

## Phase 4:

### Process Automation (Admin)

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#### 1) Why Automation?

Without automation, users would have to manually calculate CO<sub>2</sub> saved, assign badges, and send notifications. That's error-prone and boring. Automation ensures **consistency, efficiency, and engagement**.

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#### 2) Validation Rules

**Purpose:** Prevent bad data entry.

Example: **Trees must be > 0 for Tree Plantation**

- Go to: **Setup** → **Object Manager** → **Eco Activity** → **Validation Rules** → **New**
- Rule Name: **Validate\_Trees\_Planted**

Formula:

```
AND(  
  ISPICKVAL(Activity_Type__c, "Tree Plantation"),  
  OR(ISBLANK(Trees_Planted__c), Trees_Planted__c <= 0)  
)
```

- Error Message: *"Please enter a valid number of trees planted."*

Similarly, for Waste Recycled: must be > 0 when Activity Type = Recycling.

SETUP > OBJECT MANAGER

Eco Activity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Validation Rules

3 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
<a href="#">Validate_Awareness_Description</a>	Description	Please provide a description for the Awareness Drive.	✓	<a href="#">Jatin Awankar</a> , 9/19/2025, 5:37 AM
<a href="#">Validate_Trees_Planted</a>	Trees Planted	Please enter a valid number of trees planted.	✓	<a href="#">Jatin Awankar</a> , 9/18/2025, 2:44 AM
<a href="#">Validate_Waste_Recycled</a>	Waste Recycled	Please enter a valid Waste Recycled amount (must be greater than 0).	✓	<a href="#">Jatin Awankar</a> , 9/19/2025, 5:28 AM

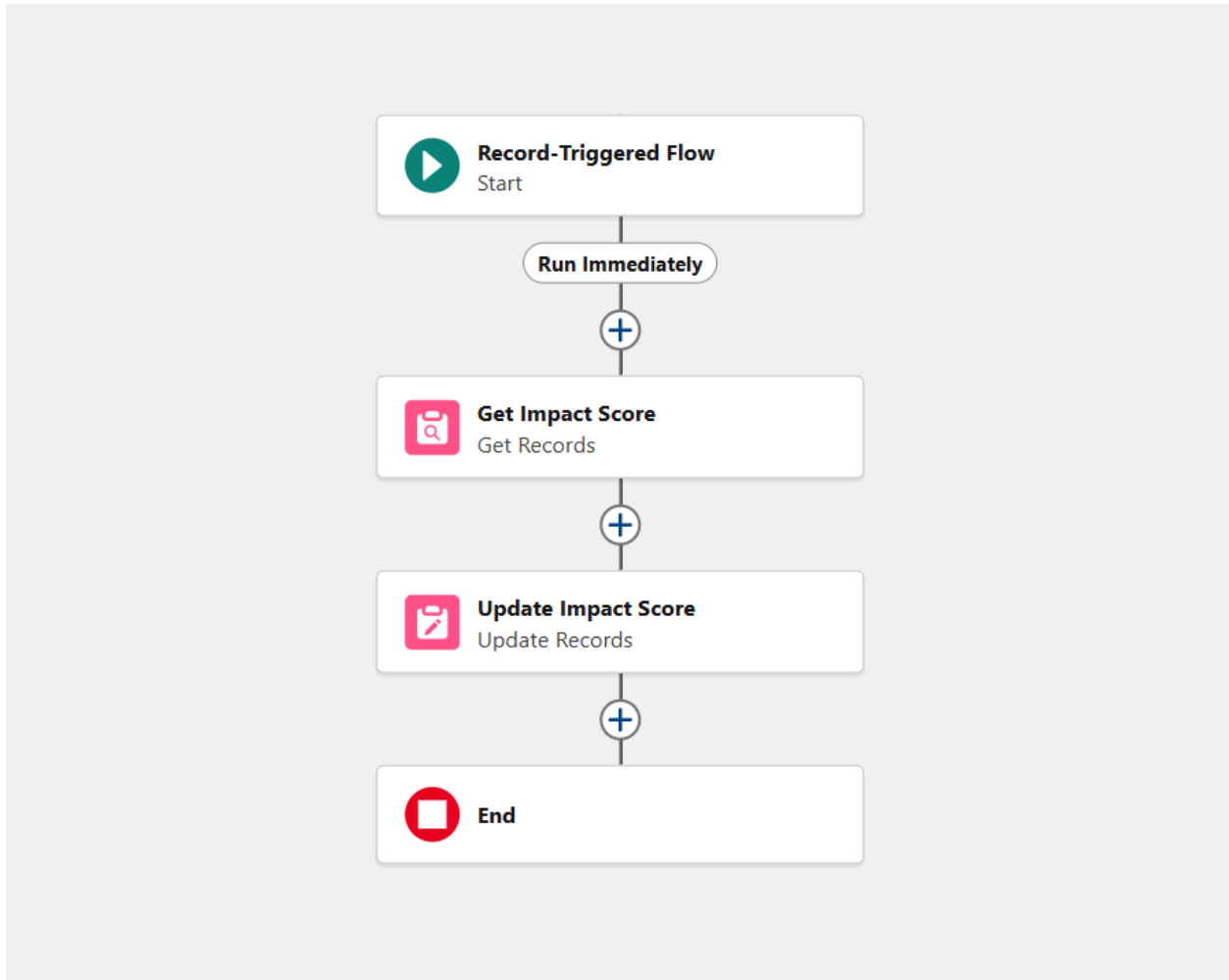
### 3) Flow Builder – CO<sub>2</sub> Calculation

**Purpose:** Auto-calculate CO<sub>2</sub> saved when an Eco Activity is created.

- Go to: **Setup** → **Flow** → **New Flow** → **Record-Triggered Flow**
- Object: **Eco Activity**
- Trigger: *When record is created or updated*
- Logic:

Formula for CO<sub>2</sub> saved =  $(\text{Trees\_Planted\_c} * 21) + (\text{Waste\_Recycled\_c} * 1.5)$

- Update field **CO2\_Saved\_\_c** in **Impact Score**.



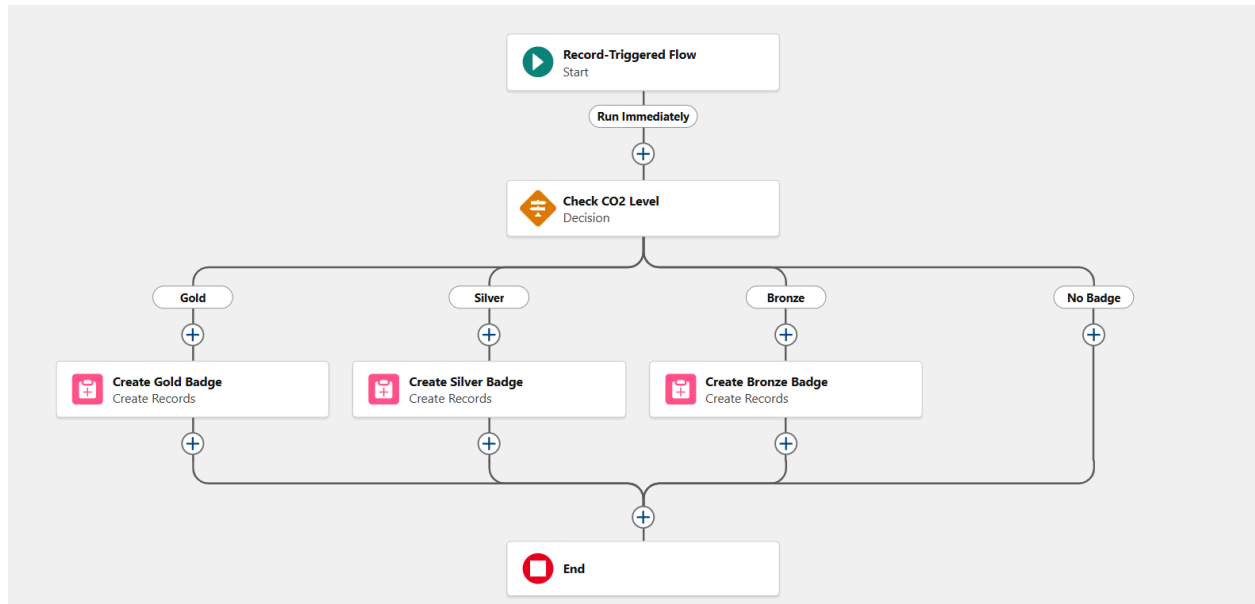
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#### 4) Flow Builder – Badge Assignment

**Purpose:** Award badges automatically when thresholds are met.

- Go to: **Flow** → **New Flow** → **Record-Triggered Flow**
- Object: **Impact Score**
- Trigger: *When record updated*
- Logic:
  - IF CO<sub>2</sub> Saved ≥ 1000 → Create Badge (Gold)

- IF CO<sub>2</sub> Saved ≥ 500 → Create Badge (Silver)
- ELSE IF CO<sub>2</sub> Saved ≥ 100 → Create Badge (Bronze)
- Assign the Badge to related User.




## 5) Email Alerts & Custom Notifications

**Purpose:** Motivate users.

### 1. Email Alert:

- Setup → Email Alerts → New.
- Example: Send email “Congrats! You earned a badge” to the Participant when a Badge record is created.


SETUP
**Classic Email Templates**

Text Email Template  
**Badge Earned**
Help for this Page ?

Preview your email template below.

**Email Template Detail**
Edit Delete Clone

Email Templates from Salesforce		Unfiled Public Classic Email Templates	
Email Template Name	Badge Earned	Available For Use	<input type="checkbox"/>
Template Unique Name	Badge_Earned	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Manager_GT [Change]		
Description			
Created By	Jatin Awankar, 9/19/2025, 6:54 AM	Modified By	Jatin Awankar, 9/19/2025, 6:55 AM

**Email Template**
Send Test and Verify Merge Fields

**Subject** 🚩 Congrats! You earned a badge

**Plain Text Preview**

Hi {Recipient\_Name},  
Congratulations! You just earned the {fBadge\_\_c.Badge\_Name\_\_c} badge for your contribution to GreenTrack 🌱  
Keep up the great work!

## 2. Custom Notification (Lightning):


- Setup → Notification Builder → Custom Notifications.
- Create “GreenTrack Milestone Reached.”
- Trigger via Flow → When a new Badge is assigned, send notification.

## 6) Workflow Rules / Process Builder

Note: Salesforce is moving away from Workflow Rules & Process Builder in favor of Flows.

Still, for academic completeness:

- Workflow Rule Example: Send email to NGO Manager when an Eco Activity > 500 Trees is logged.



**Workflow Rules**

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Workflow Rule

Gold Bagger

Help for this Page ?


 Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.
 [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

Edit

Clone

Deactivate

Rule Name	Gold Bagger	Object	Eco Activity
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Eco Activity: Trees Planted GREATER OR EQUAL 500		
Created By	Jatin Awankar, 9/19/2025, 7:01 AM	Modified By	Jatin Awankar, 9/19/2025, 7:02 AM

## 7) Approval Process (Optional)

- Example: Big activities (e.g., more than 1000 trees logged) → Require Manager approval before Impact Score updates.
- Setup → Approval Processes → New Approval Process.

## 8) Deliverables for Phase 4

1. **Validation Rules:** Tree Plantation, Recycling, etc.
2. **Flows:**
  - CO<sub>2</sub> Calculation Flow.
  - Badge Assignment Flow.
  - Notification Flow.
3. **Email Alerts & Custom Notifications.**
4. **Optional Workflow Rule / Approval Process.**

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## 9) Testing Checklist

- Log in as a Participant → Create Activity (Tree Plantation, 10 trees).
  - Verify CO<sub>2</sub> saved auto-calculated = 210kg.
- Log activity with 600 trees → Verify Silver Badge auto-assigned + email sent.
- Try entering invalid values → Validation Rule blocks.
- NGO Manager receives notification for large activity.