Phase 4: Process Automation (Admin) — Learn Smart CRM Project

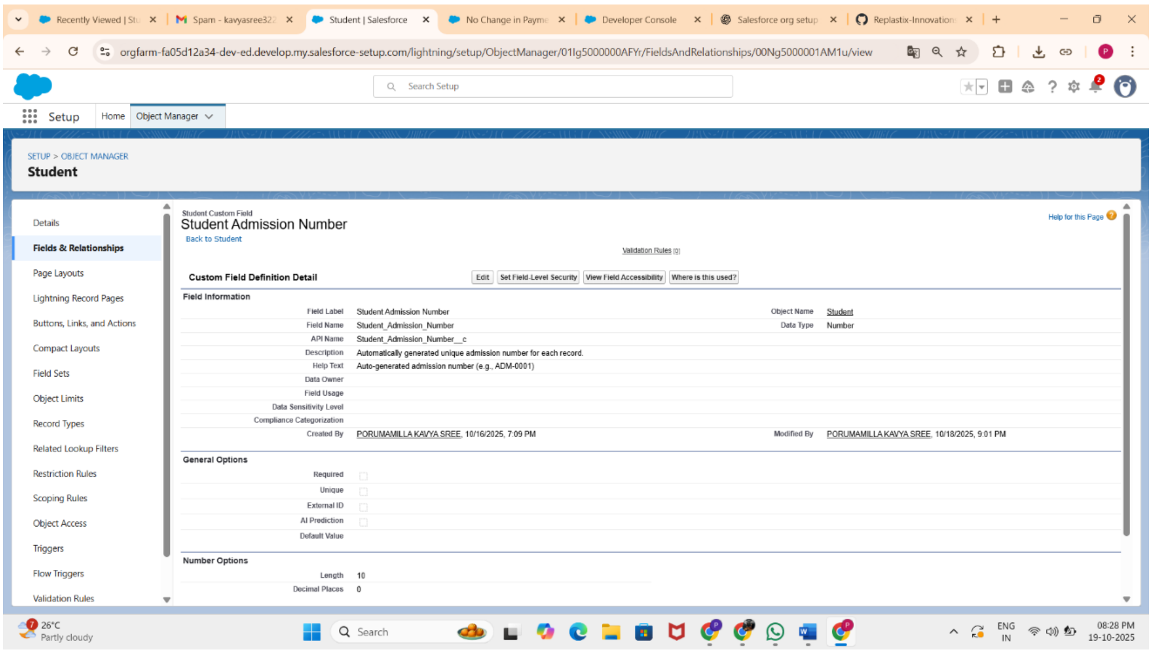
Process Automation in Salesforce helps streamline business operations, enforce business rules, and save time by automating repetitive tasks.

1️⃣ Validation Rules

- Validation Rules ensure **data integrity** by enforcing conditions before a record is saved.
- Example: Prevent a Student from being enrolled without an Admission Number.

Step-by-Step

1. Setup → Object Manager → Select object (e.g., **Student**).
2. Click **Validation Rules** → **New**.
3. Enter **Rule Name** (e.g., AdmissionNumber_Required).
4. Enter **Error Condition Formula**:
5. ISBLANK(Admission_Number__c)
6. Enter **Error Message**: "Admission Number cannot be blank."
7. Select **Error Location** (Field or Top of Page).
8. Click **Save**.



2 Workflow Rules (Classic Automation)

- Automates **actions** like emails, field updates, tasks when conditions are met.
- Example: Send an email to admin when a new Student record is created.

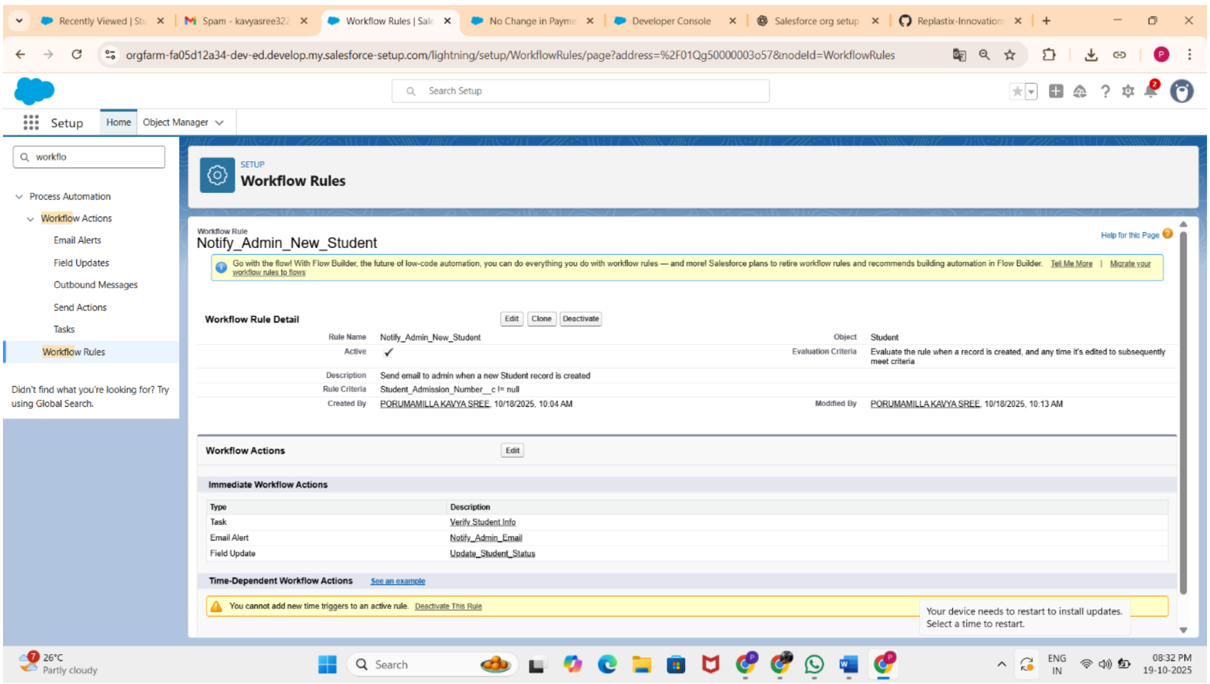
Step-by-Step

1. Setup → Workflow Rules → **New Rule**.
2. Select Object (e.g., Student) → **Next**.
3. Enter **Rule Name** → Set **Evaluation Criteria** (Created, Created & Edited).
4. Enter **Rule Criteria** (e.g., Admission_Number__c != null).
5. Click **Save & Next**.

Add Workflow Actions

- **Email Alert**: Notify admin.
- **Field Update**: Update a field automatically.
- **Task**: Assign a task to a user.

6. Activate the workflow.

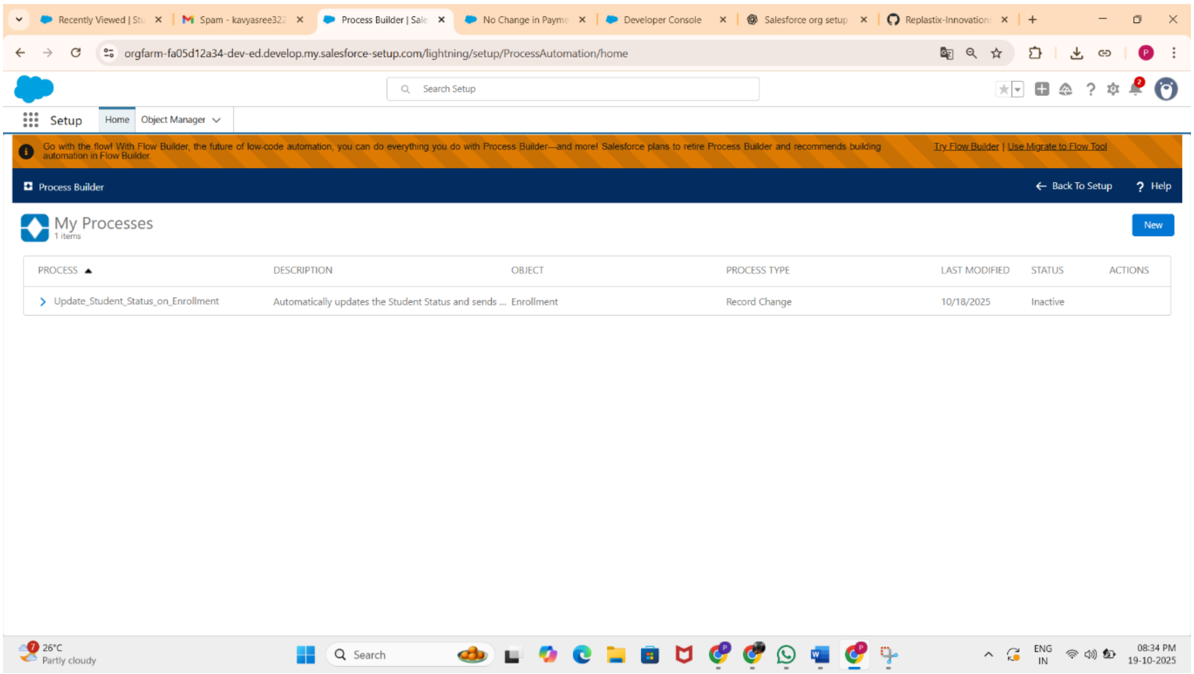


3 Process Builder (Point-and-Click Automation)

- More advanced than Workflow Rules. Allows multiple **if-then actions**.
- Example: Automatically update Student status when Enrollment is created.

Step-by-Step

1. Setup → Process Builder → **New** → Enter Name & Description → **Save**.
2. Add **Object** (e.g., Enrollment) → Start the process **when a record is created or edited**.
3. Define **Criteria** (e.g., Enrollment_Status__c = "Completed").
4. Add **Immediate Actions**:
    - Field Update: Update Student Status to "Enrolled".
    - Email Alert: Notify Student or Admin.
5. Click **Activate**.



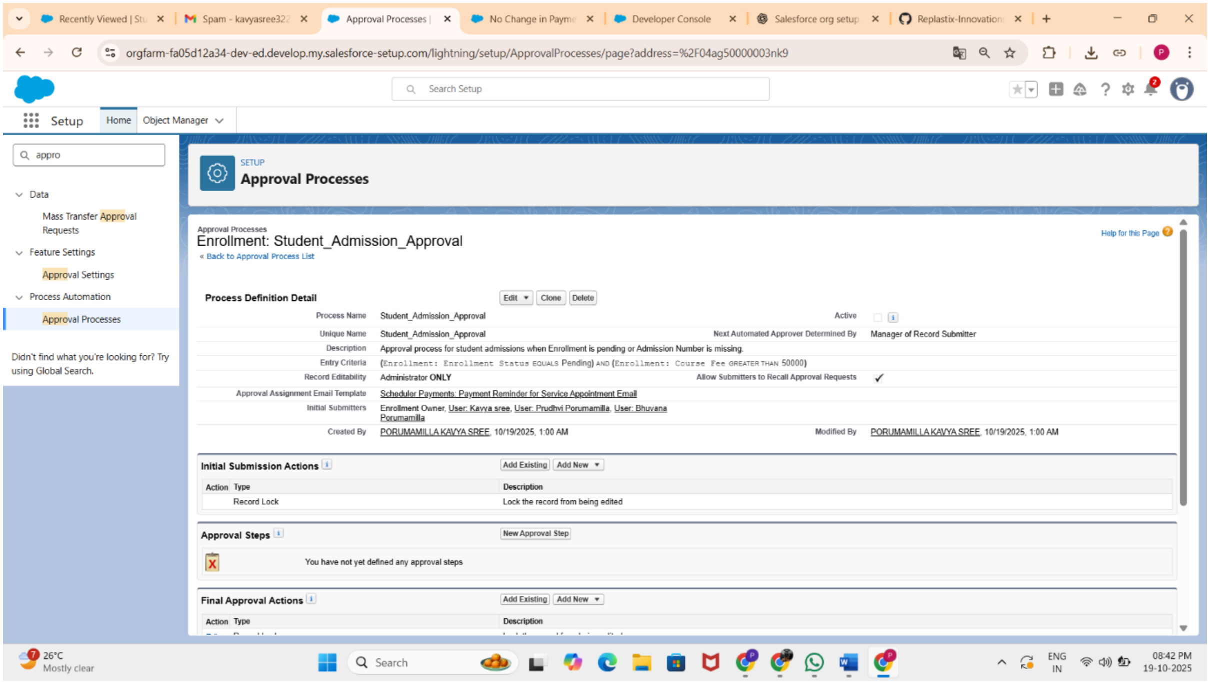
4 Approval Process

What & Why

- Automates record approvals based on conditions.
- Example: Approval required when Student Admission Number is missing or special approval for high-value courses.

Step-by-Step

1. Setup → Approval Processes → **Create New Approval Process** → Use **Standard Setup Wizard**.
2. Select Object (e.g., Student).
3. Define:
    - Name of approval process
    - Entry criteria (e.g., Enrollment_Status = "Pending")
4. Assign **Approver** (User or Queue).
5. Define **Approval Actions** (Field Updates, Email Alerts) and **Rejection Actions**.
6. Activate process.



5️⃣ Flow Builder

- Powerful Salesforce automation tool. Handles **complex multi-step automations**.

Types of Flows

1. **Screen Flow** → Interactive user flow (e.g., Student registration wizard).
2. **Record-Triggered Flow** → Triggered when a record is created/updated.
3. **Scheduled Flow** → Run at a specific date/time (e.g., daily updates).

4. **Auto-launched Flow** → Triggered by other flows, processes, or Apex.

Step-by-Step for Record-Triggered Flow

1. Setup → Flows → **New Flow** → Select **Record-Triggered Flow** → Create.
2. Select Object (e.g., Student) → Trigger **on Create or Update**.
3. Define **Conditions** (e.g., Admission_Number__c is not null).
4. Add **Actions**:
   - Update Records: Set Status = "Enrolled".
   - Send Email Alert.
   - Create Task for admin.
5. Connect elements → **Save** → **Activate**.

6️⃣ Email Alerts

- Sends email notifications automatically based on Workflow, Process Builder, or Flow.

Step-by-Step

1. Setup → Email Alerts → **New Email Alert**.
2. Select Object (e.g., Student).
3. Enter **Name, Description**.
4. Choose **Email Template** (create if needed).
5. Select **Recipients** (User, Role, or Field).
6. Save → Use in Workflow/Process/Flow.

7️⃣ Field Updates

- Automatically updates field values based on conditions.

Step-by-Step

1. Workflow → Field Update → **New**.
2. Enter Name → Choose Field (e.g., Student Status).
3. Set **New Value** (e.g., "Enrolled").
4. Save and activate.

8️⃣ Tasks

- Automatically assigns tasks to users. Example: Admin to verify Student info.

Step-by-Step

1. Workflow/Process/Flow → **New Task Action**.
2. Enter **Assigned To, Subject, Due Date, Priority**.
3. Save → Activate.

9️⃣ Custom Notifications

- Sends in-app notifications to users. Works in Lightning Experience and Mobile App.

Step-by-Step

1. Setup → **Notification Builder** → **Custom Notifications** → **New**.
2. Enter **Name, API Name, Supported Channels** (Desktop, Mobile).
3. Save → Use in Flow, Process, or Workflow to notify users when needed