

Phase 4 — Process Automation (Admin)

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS

Prepared for: Sai Teja Kotipalli

Status: Completed

1. Executive Summary

This document records all automations created in Phase 4: **Process Automation (Admin)**.

It includes validation rules, flows, an approval process, and supporting deliverability settings. Each item lists the purpose, where to find it in Salesforce, and how to test it. This document can be submitted as proof of work and a guide for mentor review.

2. Automations Implemented

2.1 Validation Rule

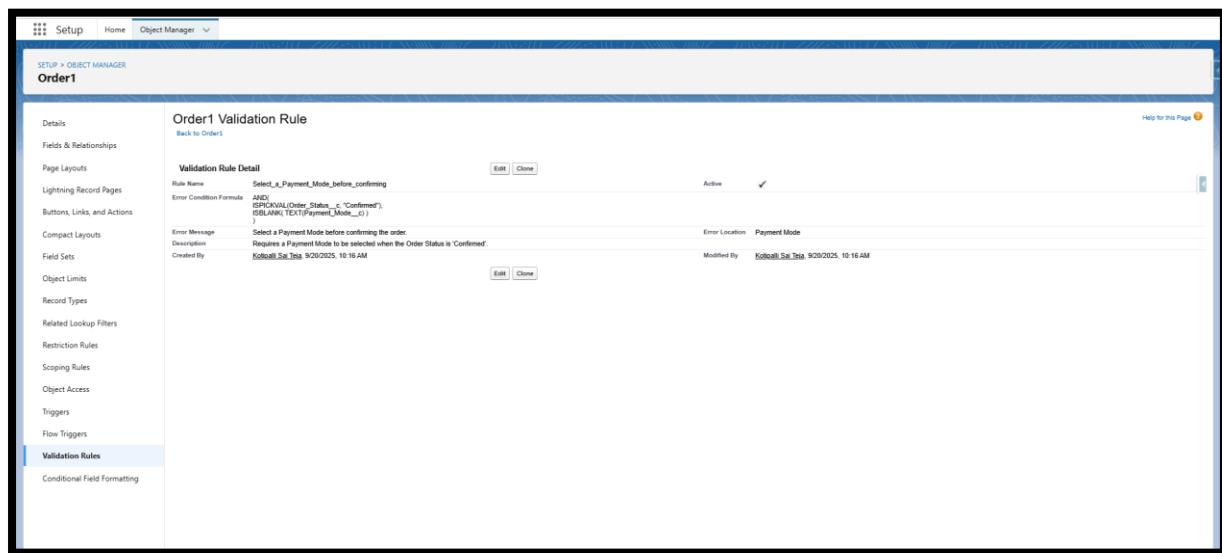
Name: VR_PaymentMode_Required

Object: Order__c

Logic: Prevents saving an Order if Payment Mode is blank.

- Formula:** ISBLANK(Payment_Mode__c)
- Error Message:** *Payment Mode must be selected before saving Order*
- Error Location:** Top of Page
- Verify:** Setup → Object Manager → Order → Validation Rules

Test: Try saving an Order without Payment Mode → error shown.



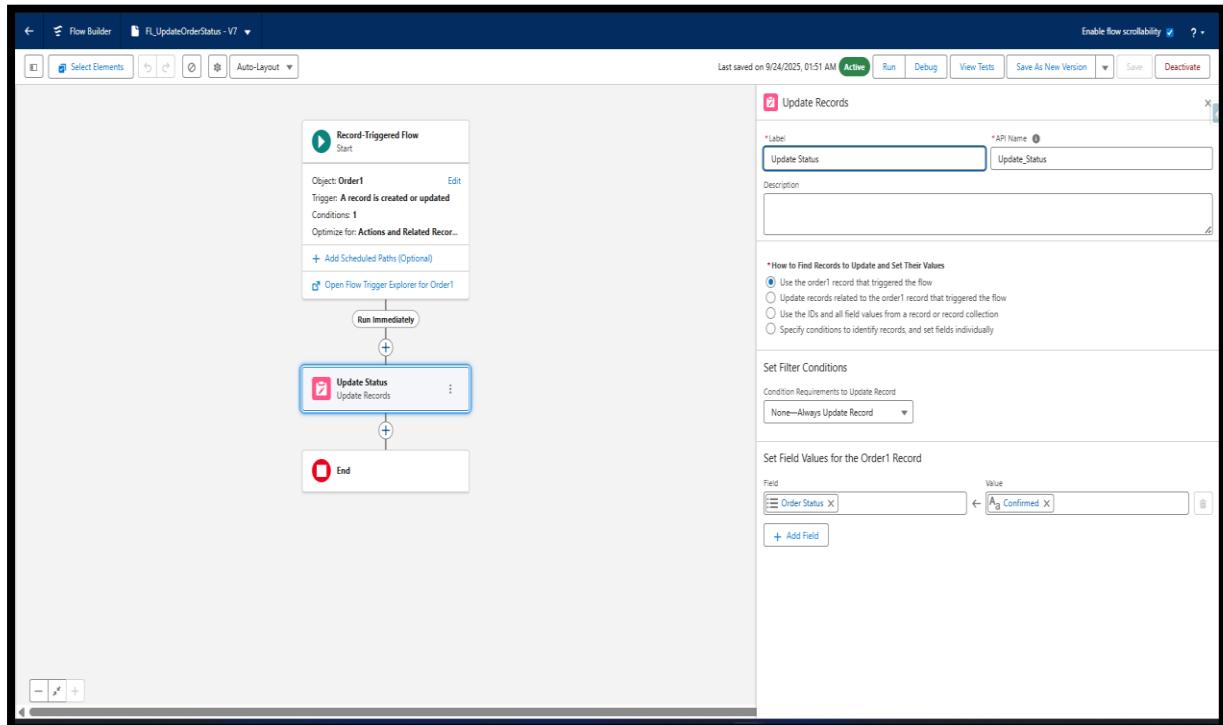
2.2 Flow: FL_UpdateOrderStatus

Type: Record-Triggered Flow (After Create/Update)

Object: Order__c

- **Trigger Criteria:** Payment_Mode__c = Online
- **Action:** Update current Order record → Order_Status__c = Confirmed
- **Verify:** Setup → Flows → FL_UpdateOrderStatus

✓ **Test:** Create Order with Payment Mode = Online → Status auto-updates to Confirmed.



2.3 Flow: FL_SendOrderShippedEmail

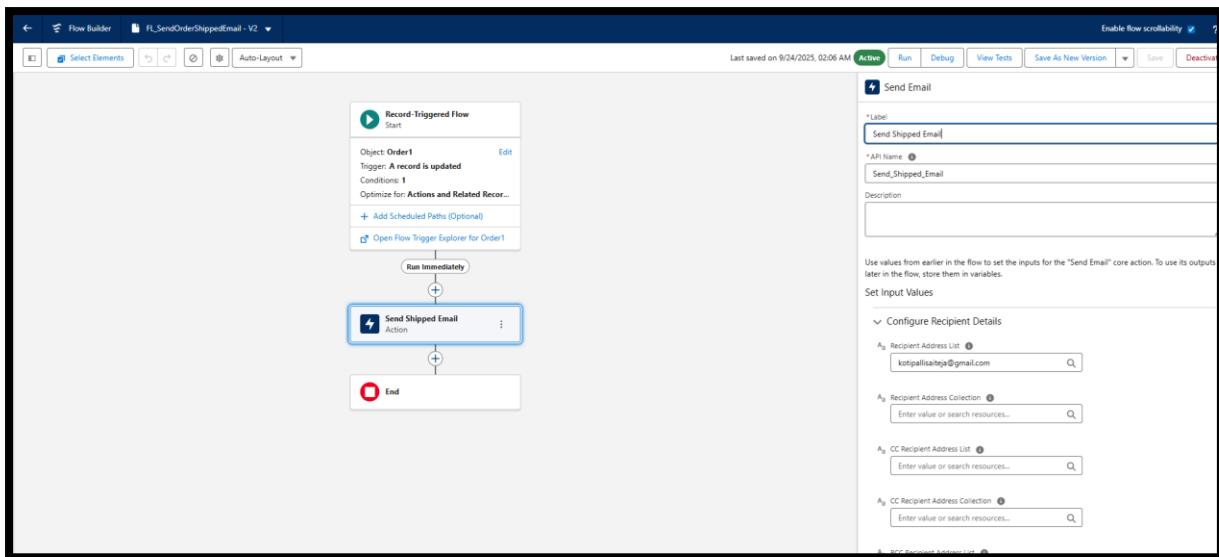
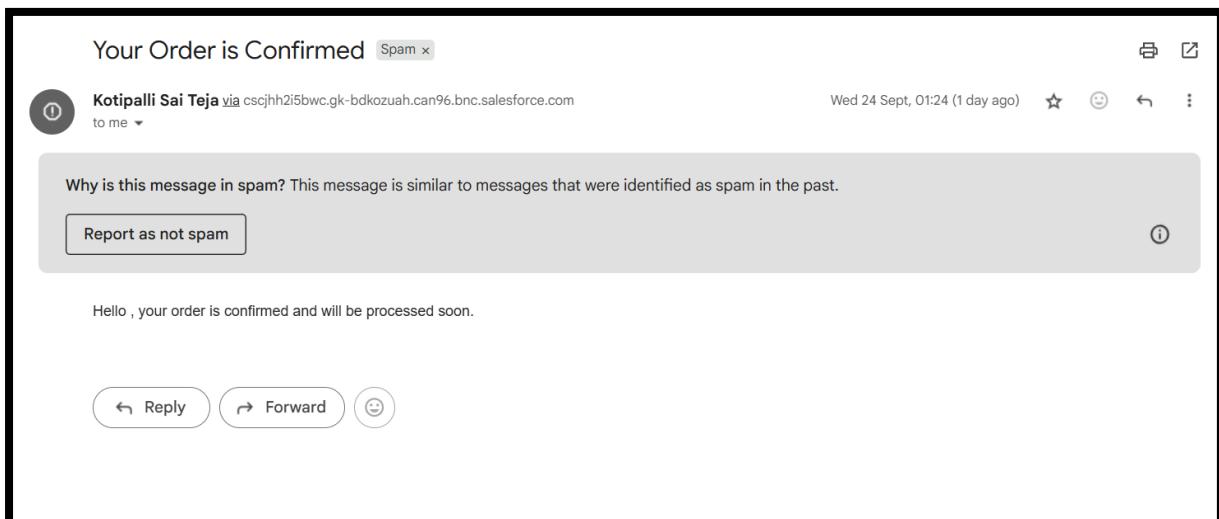
Type: Record-Triggered Flow (After Update)

Object: Order__c

- **Trigger Criteria:** Order_Status__c = Shipped
- **Action:** Send Email (demo configured with *Additional To Address* = your email)
- **Deliverability:** Setup → Email → Deliverability → All email
- **Verify:** Setup → Flows → FL_SendOrderShippedEmail

✓ **Test:** Update an Order's Status to Shipped → email received at configured address.

⚠ **Note:** Direct customer email caused access error. Workaround = fixed Additional To Address for demo. For production, map Customer Email into Order and use that field.

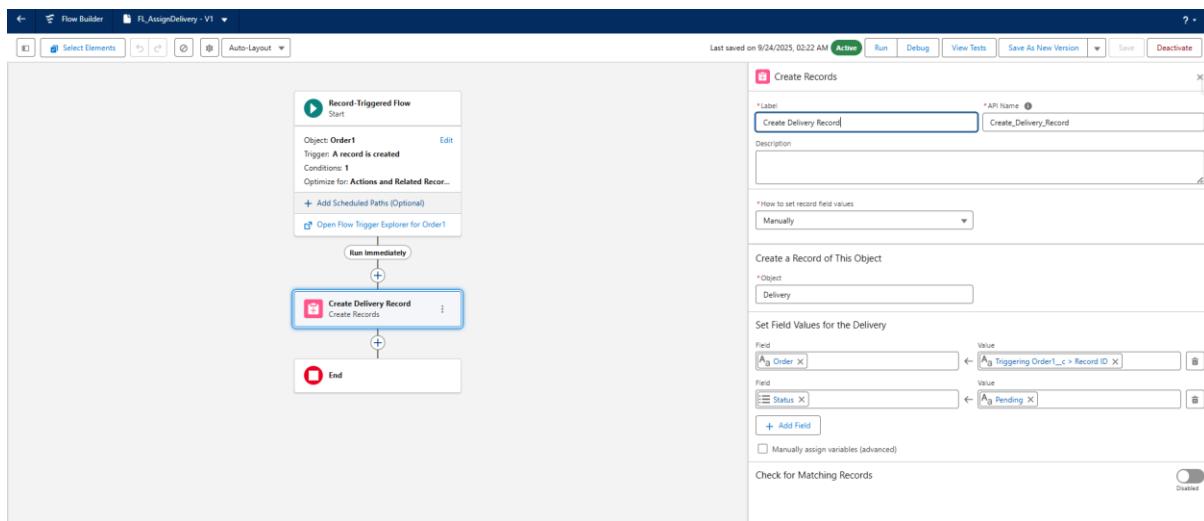
2.4 Flow: FL_AssignDelivery

Type: Record-Triggered Flow (After Create)

Object: Order__c

- **Trigger Criteria:** Order_Status__c = Confirmed
- **Action:** Create a Delivery__c record with:
 - Order__c = \$Record.Id
 - Status__c = Pending
- **Verify:** Setup → Flows → FL_AssignDelivery

✓ **Test:** Create Confirmed Order → Delivery record auto-created.



2.5 Approval Process: BulkOrderApproval

Object: Order__c

Entry Criteria: Record Type = Bulk Order

- **Approver:** System Administrator (demo)
- **Final Approval:** Set Status = Approved
- **Final Rejection:** Set Status = Rejected
- **Verify:** Setup → Approval Processes → Order → BulkOrderApproval

✓ **Test:** Submit Bulk Order for approval → Approver receives request → Approve/Reject → Status updated.

SETUP Approval Processes

Order1: BulkOrderApproval
= Back to Approval Process List

Process Definition Detail

Process Name	BulkOrderApproval	Active	<input checked="" type="checkbox"/>
Unique Name	BulkOrderApproval	Next Automated Approver Determined By	
Description			
Entry Criteria	Order1: Record Type EQUALS Bulk Order		
Record Editability	Administrator ONLY		
Approval Assignment Email Template			
Initial Submitters	Order1 Owner		
Created By	Kotipalli Sai Teja 9/23/2025, 1:45 PM		
Modified By	Kotipalli Sai Teja 9/23/2025, 1:47 PM		

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Rejected Behavior
Show Actions	Edit 1	Step 1			User Kotipalli Sai Teja	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Update Status to Approved

Final Rejection Actions

Action	Type	Description
Record Lock		Unlock the record for editing
Field Update		Update Status to Rejected

Approval Request Spam x

Kotipalli Sai Teja via bxbllr51szh0n4.gk-bdkzuah.can96.bnc.salesforce.com to me ▾

Wed 24 Sept, 10:38 (1 day ago) ☆ 😊 ↶ ⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam ⓘ

Kotipalli Sai Teja has requested your approval for the following item: <https://orgfarm-4c5183c8d1-dev-ed.develop.my.salesforce.com/p/process/ProcessInstanceWorkItemWizardStageManager?id=04Igk000000QZ2F>

Please click this link to approve or reject this record.

Thank you,
Salesforce

3. Deliverability Settings

- **Setting:** Email Deliverability = All email
- **Location:** Setup → Email → Deliverability

Required to allow flows to send test emails.

 SETUP Deliverability

Deliverability

Configure the settings on this page to improve your organization's email deliverability. Some settings apply to emails sent through Salesforce and emails sent through external accounts that you can connect to Salesforce. Other settings apply to emails sent through Salesforce or email relay only.

Deliverability

Access level Save | = Required Information

Access to Send Email (All Email Services)

Access level

Bounce Management (Emails from Salesforce or Email Relay Only)

When Bounce Management is activated and a user sends an email to an invalid email address, the email bounces back to Salesforce and the user is prevented from sending email to that address until it is validated.

Activate bounce management
 Return bounced emails to sender [i](#)

Data Protection and Privacy

Enforce email privacy settings [i](#)

Email Security Compliance (Emails from Salesforce or Email Relay Only)

Enable these options to improve the deliverability of the email you send to recipients who use email security and authentication mechanisms.

Enable compliance with standard email security mechanisms

Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only)

Configure TLS settings for outbound emails.

TLS Setting Restrict TLS to these domains:

Email Sending Domain Ownership (Emails from Salesforce or Email Relay Only)

Verify the ownership of email sending domains by DKIM keys [i](#)