

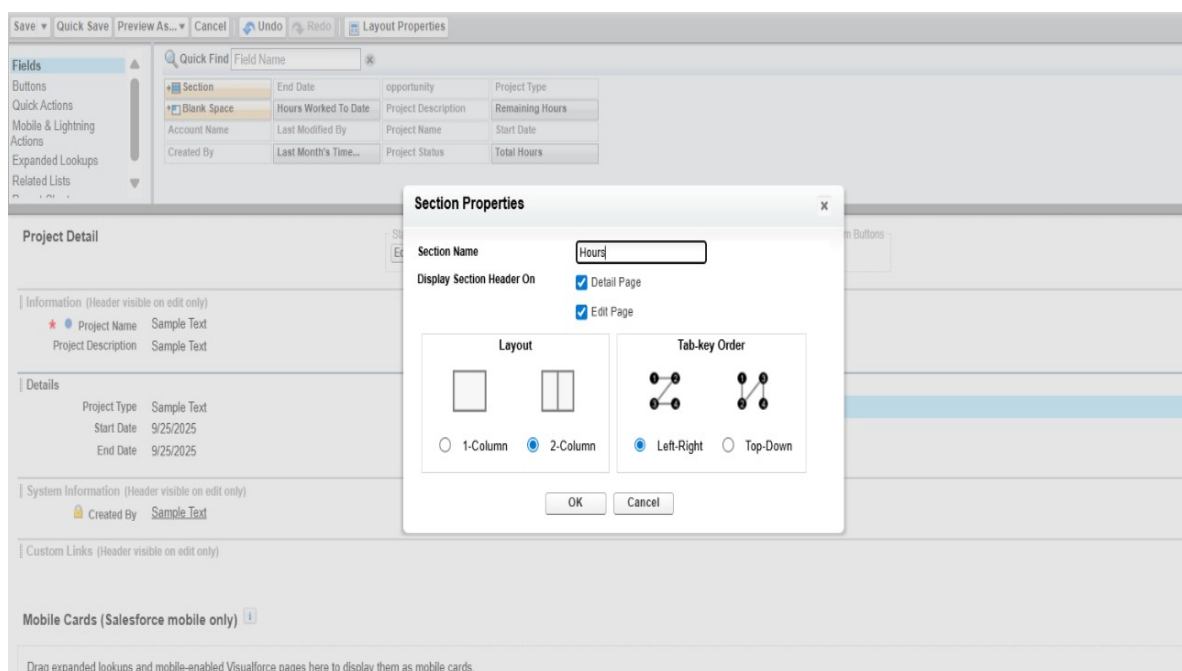
PROJECT MANAGEMENT APP

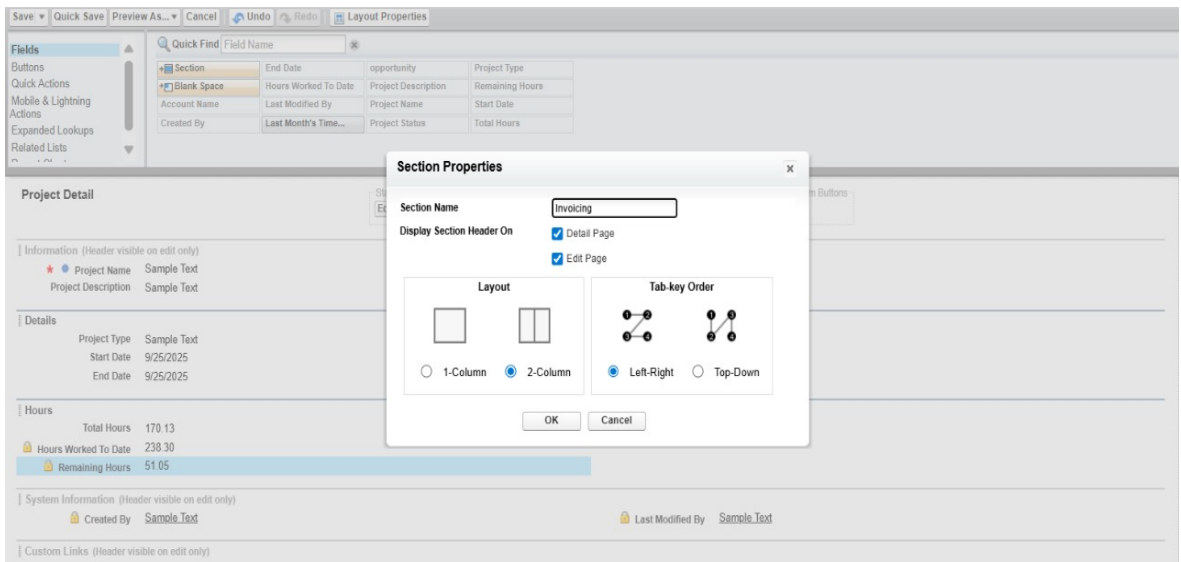
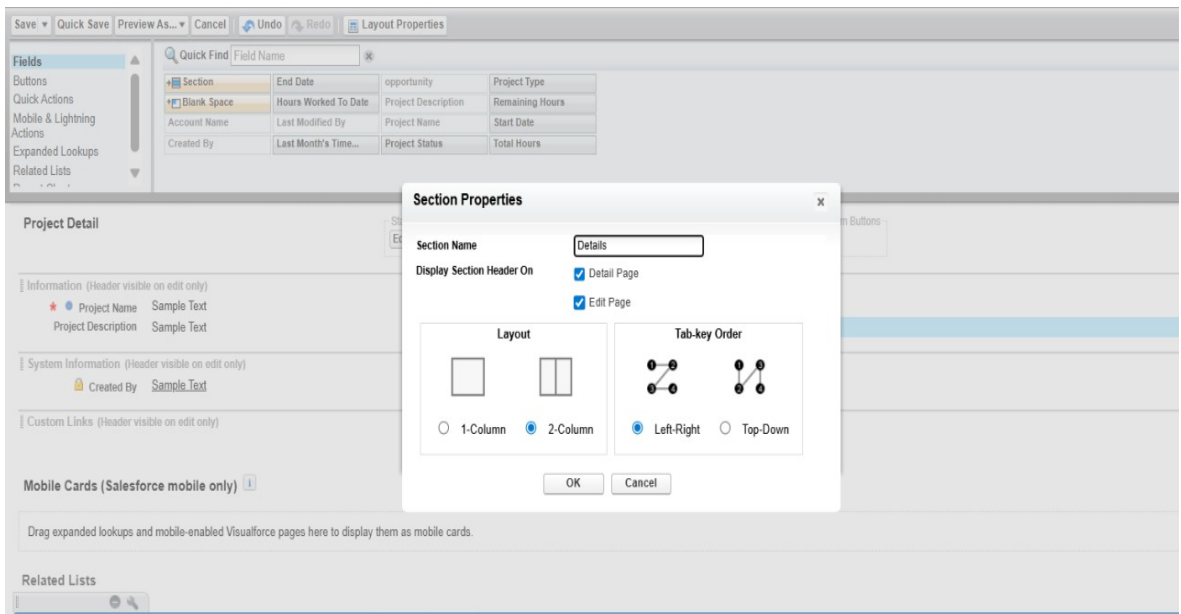
KULDEEP UPADHYAY

Phase 4: Process Automation (Admin)

Goal: Automate recurring processes and enforce validations.

- Create validation rules (e.g., Task end date must be after start date).
- Use Flow Builder for auto-assigning tasks to resources.
- Implement record-triggered flows for project updates.
- Define approval process for high-priority project tasks.
- Set up email notifications for task assignments and completions.
- Configure custom notifications for in-app alerts.
- Automate reminders for deadlines through scheduled flows.
- Assign follow-up tasks automatically after project phase completion.
- Use conditional logic to update project statuses dynamically.





Create Formula Field (Object: Project)

Field Label

Field Name

Description

Help Text

This text displays on detail and edit pages when users hover over the info icon next to this field.

Return Type

Decimal Places

Formula

Select Field Type: Insert Field: Insert Operator:

Use formula syntax. Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

Blank Fields

☒ Treat blank fields as zeroes

☐ Treat blank fields as blanks

Save Cancel

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Create Roll-Up Summary Field (Object: Project)



Field Label

Field Name

Description

Help Text

This text displays on detail and edit pages when users hover over the Info icon next to this field.

Summarized Object

Summary Type

Field to Aggregate

Filter Criteria Roll-Up Summary field filter criteria can't be edited in Schema Builder. To edit the filter criteria, open the field's edit page.

- ☐ Only records meeting certain criteria should be included in the calculation
- ☒ All records should be included in the calculation