

Property Management Application

By Marthand Bhargav

Phase 4: Process Automation - Implementation Documentation

Table of Contents

1. [Overview](#)
2. [Flow Builder Implementation](#)
3. [Approval Process](#)
4. [Email Alerts & Templates](#)
5. [Workflow Rules](#)

1. Overview

1.1 Phase Objectives

This phase implements automated business processes for the Property Management System, including:

- Automated statement generation
- Payment processing workflows
- Deposit refund approvals
- Email notifications
- Scheduled maintenance tasks

Component	Type	Purpose
Update Statement on Payment	Record-Triggered Flow	Updates statement status when payment is received
Monthly Invoice Generation	Scheduled Flow	Generates invoices on scheduled basis
Deposit Refund Approval	Approval Process	Manages security deposit refund approvals
Rent Due Reminder	Email Template	Notifies tenants of upcoming payments
Payment Confirmation	Email Template	Confirms successful payment receipt
Statement Due Reminder	Workflow Rule	Triggers email alerts for due statements

2. Flow Builder Implementation

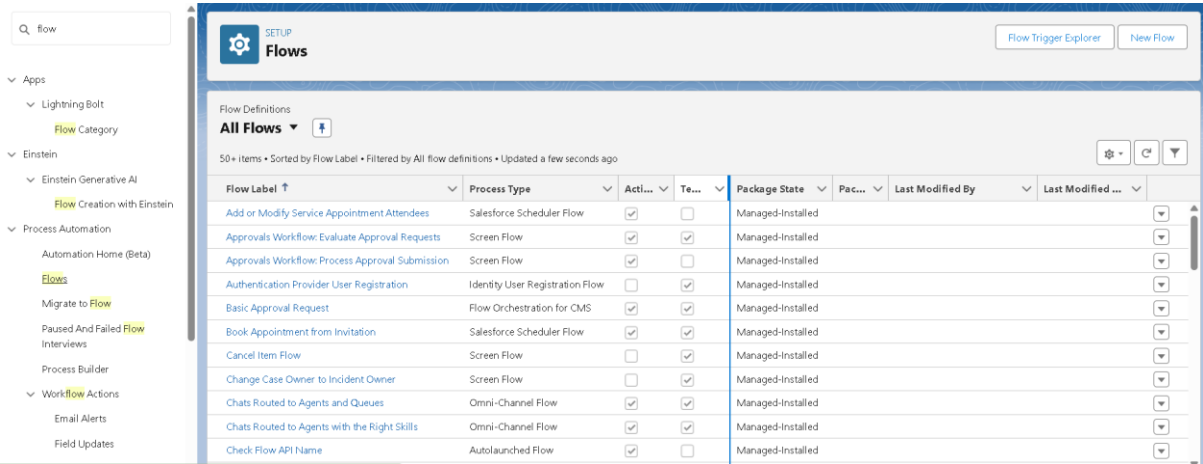
2.1 Flow 1: Generate Monthly Rent Statement

2.1.1 Purpose

Automatically generates monthly rent statements when a rental agreement becomes active or when the next statement date arrives.

2.1.2 Navigation Path

Setup → Process Automation → Flows → New Flow



2.1.3 Flow Configuration

Flow Type: Record-Triggered Flow

Trigger Object: Rental_Agreement__c

[INSERT SCREENSHOT: Flow type selection screen]

2.1.4 Start Element Configuration

Setting	Value
Object	Rental_Agreement__c
Trigger	A record is created or updated
Condition Requirements	All Conditions Are Met (AND)
Optimize For	Actions and Related Records

Entry Conditions:

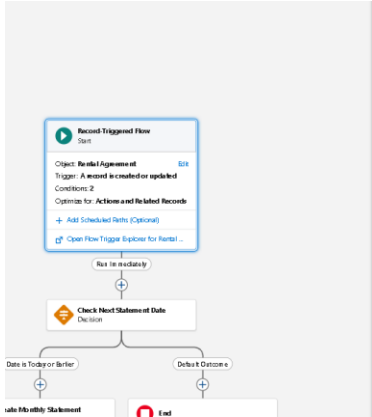
Agreement_Status__c EQUALS Active

AND

(Next_Statement_Date__c IS NULL

OR

Next_Statement_Date__c LESS OR EQUAL TODAY())



Record Triggered Flow
Start
Object: Rental Agreement
Trigger: A record is created or updated
Conditions: 2
Optimize for: Actions and Related Records
+ Add Scheduled Paths (Optional)
+ Open Flow Trigger Explorer for Rental ...

Run Immediately

Check Next Statement Date Decision

Date is Today or Earlier

Default Outcome

Info Info Info Statement

End

Configure Start

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
Agreement Status	Equals	Active
Next Statement Date	Is Null	True

+ Add Condition

When to Run the Flow for Updated Records

☒ Every time a record is updated and meets the condition requirements

☐ Only when a record is updated to meet the condition requirements

Optimize Flow

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.

Is this flow making an external callout or connecting to an external system?

An asynchronous path is required for flows that involve external systems.

Add Asynchronous Path ☐

Decision

*Label: Check Next Statement Date

*API Name: Check_Next_Statement_Date

Description:

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER: 1

Outcome Name: Date is Today or Earlier

Condition Requirements to Execute Outcome: All Conditions Are Met (AND)

Resource: rental__c > Next Statement Date

Operator: Less Than or Equal

Value: CurrentDateFormula

When to Execute Outcome: ☒ If the condition requirements are met

2.1.5 Flow Elements

Element 1: Create Monthly Statement

Element Type: Create Records

Property	Value
Label	Create Monthly Statement
API Name	Create_Monthly_Statement
Records to Create	One
Object	Statement__c

Field Mappings:

- **Rental_Agreement__c** → {!\$Record.Id}
- **Amount__c** → {!\$Record.Rental_Amount__c}
- **Statement_Date__c** → {!\$Flow.CurrentDate}
- **Due_Date__c** → {!\$Flow.CurrentDate} + 15
- **Status__c** → "Issued"
- **Statement_Type__c** → "Monthly Rent"

Outcome

Create Records

*Label

Create Monthly Statement

*API Name

Create_Monthly_Statement

Description

*How to set record field values

Manually

Create a Record of This Object

*Object

Statement

Set Field Values for the Statement

Field

Amount

Value

Triggering Rental_Agreement_c > Rental Amount

Field

Rental Agreement

Value

Triggering Rental_Agreement_c > Record ID

Field

Statement Date

Value

Running Flow Interview > CurrentDate

Field

Statement Type

Value

Monthly Rent

Field

Status

Value

Issued

+ Add Field

☒ Manually assign variables (advanced)


Element 2: Update Next Statement Date

Element Type: Update Records

Property	Value
Label	Update Next Statement Date
API Name	Update_Next_Statement_Date
Records to Update	Use the rental agreement record that triggered the flow

Field Updates:

- **Next_Statement_Date__c** → `{!$Flow.CurrentDate} + 30`

 Update Records ×

Update Next Statement Date

Update_Next_Statement_Date

Description

*How to Find Records to Update and Set Their Values

☒ Use the rental agreement record that triggered the flow

☐ Update records related to the rental agreement record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions


Condition Requirements to Update Record

None—Always Update Record ▼

Set Field Values for the Rental Agreement Record


Field

Value


 Next Statement Date

×

←

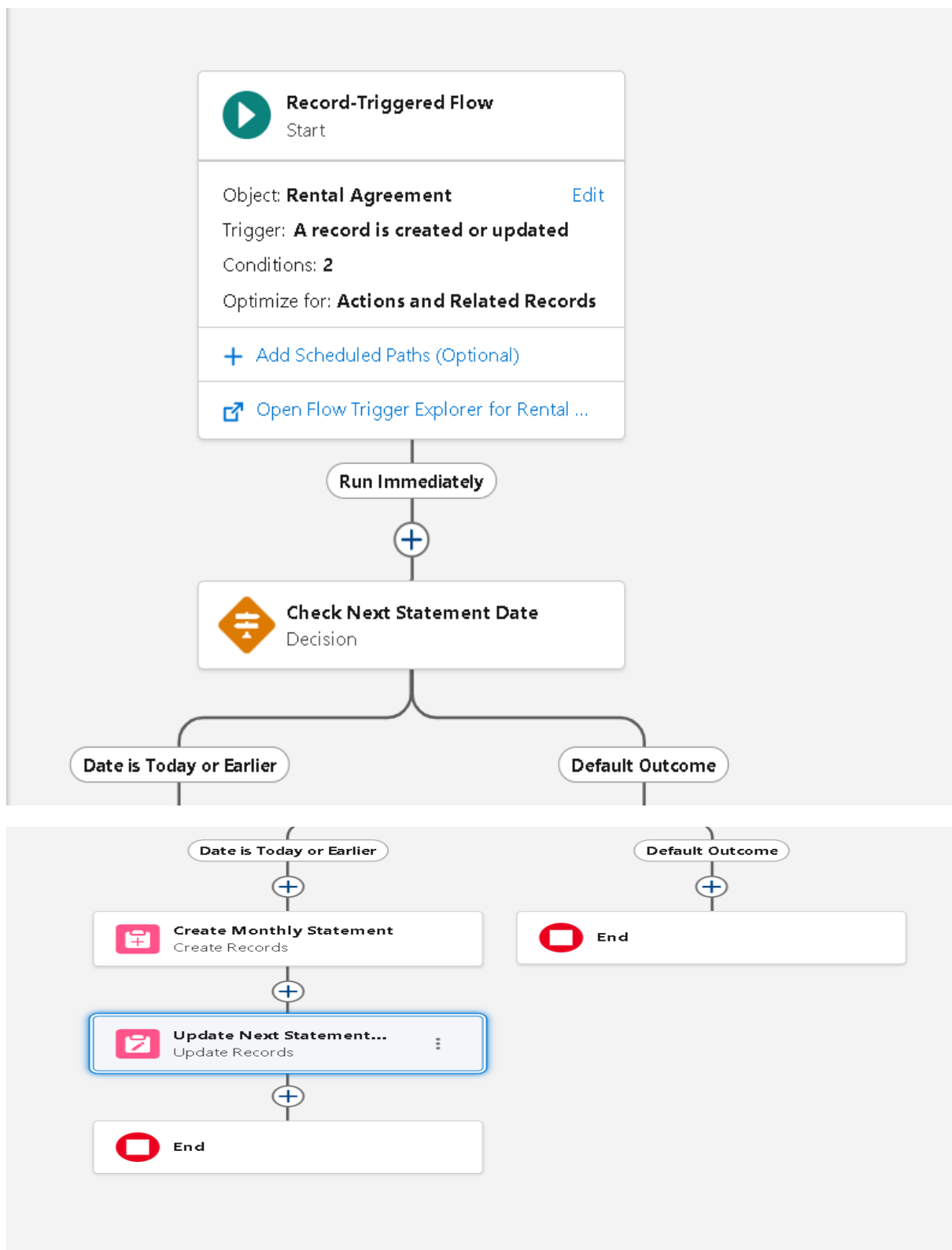
 NextStatementDate

×



+ Add Field

2.1.6 Complete Flow Diagram



2.1.7 Save and Activate

Setting	Value
Flow Label	Generate Monthly Rent Statement
Flow API Name	Generate_Monthly_Rent_Statement
Description	Automatically generates monthly rent statements for active rental agreements

Last saved on 9/26/2025, 06:25 PM

Active

Run

Debug

View Tests

Save As New Version

▼

Save

Deactivate

 Update Records

×

2.2 Flow 2: Update Statement Status on Payment

2.2.1 Purpose

Automatically updates statement status to "Paid" when full payment is received.

2.2.2 Flow Configuration

Flow Type: Record-Triggered Flow

Trigger Object: Payment__c

2.2.3 Start Element Configuration

Setting	Value
Object	Payment__c
Trigger	A record is created or updated
Entry Condition	Status__c EQUALS Paid

The image shows the 'Configure Start' configuration for a Record-Triggered Flow. On the left, a card displays the configuration: Object: Payment, Trigger: A record is created or updated, Conditions: 1, and Optimize for: Actions and Related Records. Below the card is a 'Run Immediately' button. On the right, the 'Configure Start' panel shows the 'Select Object' section with 'Payment' selected in a dropdown. The 'Configure Trigger' section shows 'Trigger the Flow When:' with three radio buttons: 'A record is created' (unselected), 'A record is updated' (unselected), and 'A record is created or updated' (selected).

2.2.4 Flow Elements

Element 1: Get Related Statement

Element Type: Get Records

Property	Value
Label	Get Related Statement
API Name	Get_Related_Statement
Object	Statement__c
Filter Condition	Id EQUALS {!\$Record.Statement__c}
Records to Store	Only the first record

Records to Store Only the first record

Fields Selected:

- Id
- Total_Amount__c
- Amount_Paid__c

Condition Requirements

Custom Condition Logic Is Met

*Condition Logic

1

1

Field

Status

Operator

Equals

Value

A Paid

+ Add Condition

When to Run the Flow for Updated Records


Element 2: Check if Fully Paid

Element Type: Decision

Property	Value
Label	Check if Fully Paid
API Name	Check_if_Fully_Paid

Outcome: Fully Paid

- Condition: {!Get_Related_Statement.Amount_Paid__c} GREATER OR EQUAL
 {!Get_Related_Statement.Total_Amount__c}


Decision

*Label

*API Name

Description

Outcomes

For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

+

Fully Paid

Fully_Paid

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

Operator

Value

+ Add Condition

When to Execute Outcome

☒ If the condition requirements are met
 ☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

Element 3: Mark Statement as Paid

Element Type: Update Records

Property	Value
Label	Mark Statement as Paid
API Name	Mark_Statement_as_Paid
Records to Update	Use IDs stored in a variable
Variable	{!Get_Related_Statement}

Field Updates:

- **Status__c** → "Paid"

Update Records

X

*Label

Mark Statement as Paid

*API Name ⓘ

Mark_Statement_as_Paid

Description

*How to Find Records to Update and Set Their Values

☐ Use the payment record that triggered the flow

☐ Update records related to the payment record that triggered the flow

☐ Use the IDs and all field values from a record or record collection

☒ Specify conditions to identify records, and set fields individually

Update Records of This Object Type

*Object

Statement

Filter Statement Records

Update Records of This Object Type

*Object

Statement

Filter Statement Records

Condition Requirements to Update Records

All Conditions Are Met (AND) ▼

Field

A Record ID X

Operator

Equals ▼

Value

A ...gering Payment_c > Statement X

+ Add Condition

Set Field Values for the Statement Records

Field

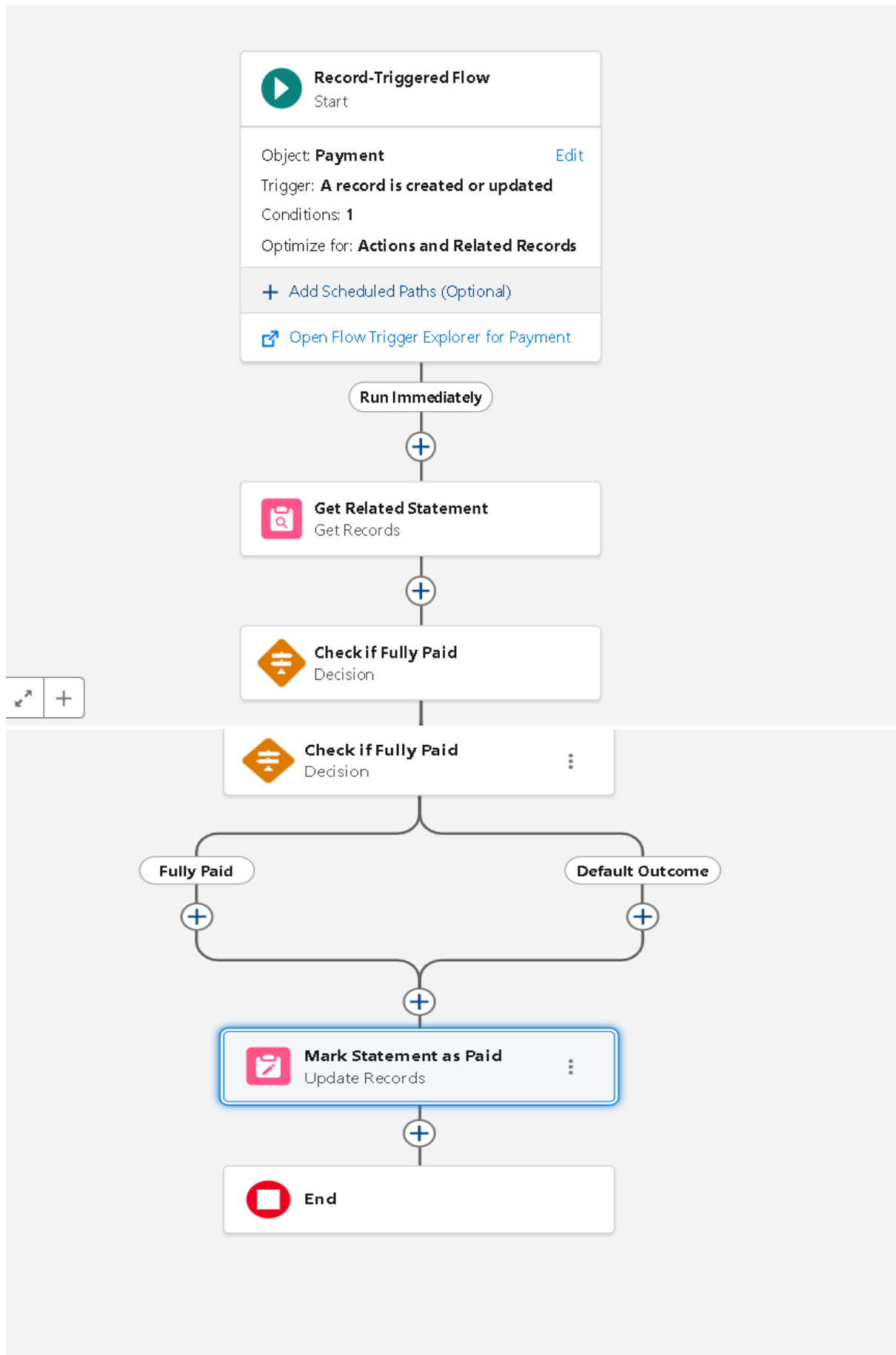
Status X

←

Value

A Paid X

+ Add Field



2.3 Flow 3: Monthly Invoice Generation (Scheduled)

2.3.1 Purpose

Generates invoices automatically on a monthly schedule for all active rental agreements.

2.3.2 Flow Configuration

Flow Type: Schedule-Triggered Flow

2.3.3 Schedule Configuration

Setting	Value
Start Date	First day of next month
Frequency	Monthly
Start Time	1:00 AM
Object	Rental_Agreement__c

Entry Conditions:

Agreement_Status__c EQUALS Active

AND

Next_Statement_Date__c EQUALS TODAY()

2.3.4 Flow Logic

Process:

- 1. Loop through all matching rental agreements
- 2. Create statement for each agreement
- 3. Send email notifications

View: All Email Alerts Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Description +	Email Template Name	Object	Last Modified Date
Edit Del	Deposit Refund Rejected	Scheduler Payments Service Appointment Cancellation Email	Rental Agreement	9/28/2025
Edit Del	Deposit Refund Submitted	Support Case Response	Rental Agreement	9/28/2025
Edit Del	Payment Confirmation Alert	Payment Confirmation	Payment	9/28/2025
Edit Del	Send Rent Due Reminder	Rent Due Reminder	Statement	9/28/2025

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

3. Approval Process

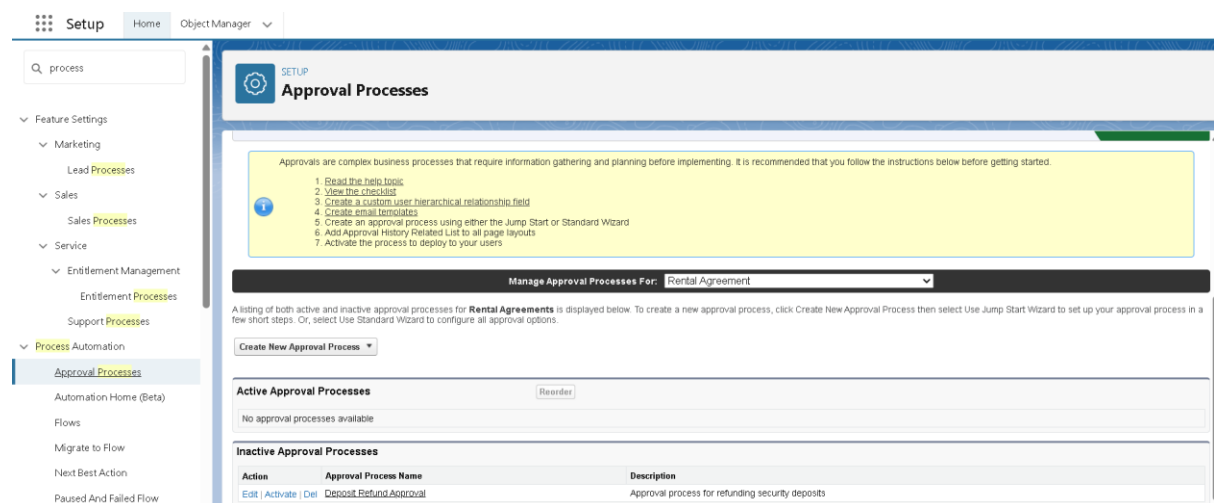
3.1 Deposit Refund Approval Process

3.1.1 Purpose

Manages the approval workflow for security deposit refunds when rental agreements are terminated.

3.1.2 Navigation Path

Setup → Process Automation → Approval Processes



3.1.3 Process Setup

Object: Rental_Agreement__c

Method: Jump Start Wizard

3.1.4 Process Definition

Setting	Value
Process Name	Deposit Refund Approval
Unique Name	Deposit_Refund_Approval
Description	Approval process for refunding security deposits

Process Definition Detail			<div>Edit</div>	<div>Clone</div>	<div>Delete</div>	<div>Activate</div>
Process Name	Deposit Refund Approval				Active	<input type="checkbox"/>
Unique Name	Deposit_Refund_Approval		Next Automated Approver Determined By			
Description	Approval process for refunding security deposits					
Entry Criteria	Rental Agreement: Agreement Status EQUALS Terminated					
Record Editability	Administrator ONLY		Allow Submitters to Recall Approval Requests		<input type="checkbox"/>	
Approval Assignment Email Template						
Initial Submitters	Rental Unit Owner					
Created By	Mathand Bhargav Jalasutram, 9/28/2025, 9:53 PM			Modified By	Mathand Bhargav Jalasutram, 9/28/2025, 10:11 PM	

3.1.5 Entry Criteria

Agreement_Status__c EQUALS Terminated

AND

Deposit_Refund_Amount__c GREATER THAN 0

3.1.6 Approver Assignment

Setting	Value
Assignment Method	Automatically assign to approver
Approver Type	User
Approver	Property Manager or Finance Manager Role

3.1.7 Approval Actions

Initial Submission Actions

Action: Email Alert

- Recipients: Submitter
- Template: Deposit Refund Submitted

Initial Submission Actions 1			Add Existing	Add New
Action	Type	Description		
	Record Lock	Lock the record from being edited		
Edit Remove	Email Alert	Deposit Refund Submitted		

Final Approval Actions

Action 1: Field Update

- Field: Deposit_Status__c
- Value: Approved

Action 2: Task

- Assigned To: Finance Team

- Subject: Process deposit refund
- Due Date: Today + 3 days

Final Approval Actions ⓘ			Add Existing Add New
Action	Type	Description	
Edit	Record Lock	Lock the record from being edited	
Edit Remove	Task	Process deposit refund	

Final Rejection Actions

Action: Email Alert

- Recipients: Submitter
- Template: Deposit Refund Rejected

Final Rejection Actions ⓘ			Add Existing Add New
Action	Type	Description	
Edit	Record Lock	Unlock the record for editing	
Edit Remove	Email Alert	Deposit Refund Rejected	

3.1.8 Additional Settings

Setting	Value
Record Editability	Administrator Only

4. Email Alerts & Templates

4.1 Email Templates

4.1.1 Navigation Path

Setup → Communication Templates → Email Templates

Setup

Home

Object Manager

email

Email

Apex Exception Email

Authorized Email Domains

Classic Email Templates

Classic Letterheads

Compliance BCC Email

DKIM Keys

Delete Attachments Sent as Links

Deliverability

Email Address

Internationalization

Email Attachments

Delivery Settings

Email Domain Filters

Email Relays

Email Footers

SETUP

Classic Email Templates

Unfiled Public Classic Email Templates

Classic Email Template Availability

Unfiled Public Classic Email Templates

Create New Folder

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New Template

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime	sfcdadm	9/13/2025
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications	sfcdadm	9/13/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels For Amazon Chime	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime	sfcdadm	9/13/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications	sfcdadm	9/13/2025
Edit Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment	sfcdadm	9/13/2025
Edit Del	Commerce Reorder Portal Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal	autocruc	9/13/2025
Edit Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment	sfcdadm	9/13/2025
Edit Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	CEPIC	9/13/2025
Edit Del	Payment Confirmation	Text	✓	Payment Confirmation	bul	9/28/2025

4.1.2 Template 1: Rent Due Reminder

Text Email Template

Rent Due Reminder

Preview your email template below.

Email Template Detail

[Edit](#) [Delete](#) [Clone](#)

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Rent Due Reminder	Last Used Date	
Template Unique Name	Rent_Due_Reminder	Times Used	
Encoding	Unicode (UTF-8)		
Author	Mathand Bhargav Jalasutram [Change]		
Description	Monthly rent due reminder for tenants		
Created By	Mathand Bhargav Jalasutram, 9/28/2025, 10:16 PM	Modified By	Mathand Bhargav Jalasutram, 9/28/2025, 10:16 PM

[Edit](#) [Delete](#) [Clone](#)

Template Configuration:

Setting	Value
Template Type	Text
Template Name	Rent Due Reminder
Description	Monthly rent due reminder for tenants
Subject	Rent Payment Due - {!Contact.Name}

Email Body:

Dear {!Contact.Name},

This is a friendly reminder that your rent payment is due.

Amount Due: \${!Statement__c.Total_Amount__c}

Due Date: {!Statement__c.Due_Date__c}

Please log into your tenant portal to make a payment or contact our office.

Thank you,

Property Management Team

Email Template

Send Test and Verify Merge Fields

Subject

Rent Payment Due - {!Contact.Name}

Plain Text Preview

Dear {!Contact.Name},
This is a friendly reminder that your rent payment is due.
Amount Due: \${!Statement__c.Total_Amount__c}
Due Date: {!Statement__c.Due_Date__c}
Please log into your tenant portal to make a payment or contact our office.
Thank you,
Property Management Team

Attachments

Attach File

No records to display

4.1.3 Template 2: Payment Confirmation

Text Email Template

Payment Confirmation

Help for this Page

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Payment Confirmation	Last Used Date	
Template Unique Name	Payment_Confirmation	Times Used	
Encoding	Unicode (UTF-8)		
Author	Mathand Bhargav Jalasutram (Change)		
Description	Payment Confirmation		
Created By	Mathand Bhargav Jalasutram, 9/28/2025, 10:17 PM	Modified By	Mathand Bhargav Jalasutram, 9/28/2025, 10:17 PM

EditDeleteClone

Template Configuration:

Setting	Value
Template Type	Text
Template Name	Payment Confirmation
Description	Payment received confirmation
Subject	Payment Received - Thank You!

Email Body:

Dear {!Contact.Name},

We have successfully received your payment.

Payment Amount: \${!Payment__c.Amount__c}

Payment Date: {!Payment__c.Payment_Date__c}

Transaction ID: {!Payment__c.AuthorizeNet_Transaction_Id__c}

Thank you for your prompt payment.

Property Management Team

Email Template

Send Test and Verify Merge Fields

SubjectPayment Received - Thank You!

Plain Text Preview

Dear {!Contact.Name},

We have successfully received your payment.

Payment Amount: \${!Payment__c.Amount__c}
Payment Date: {!Payment__c.Payment_Date__c}
Transaction ID: {!Payment__c.AuthorizeNet_Transaction_Id__c}

Thank you for your prompt payment.

Property Management Team

Attachments

Attach File

No records to display

4.2 Email Alerts

4.2.1 Navigation Path

Setup → Process Automation → Workflow Rules → Email Alerts

4.2.2 Alert 1: Send Rent Due Reminder

Setting	Value
Description	Send Rent Due Reminder
Unique Name	Send_Rent_Due_Reminder
Object	Statement__c
Email Template	Rent Due Reminder

Recipients:

- Rental Agreement: Renter (Contact)

SETUP

Email Alerts

Email Alert

Send Rent Due Reminder

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

Edit

Delete

Clone

Description

Send Rent Due Reminder

Email Template

Rent Due Reminder

Unique Name

Send_Rent_Due_Reminder

Object

Statement

From Email Address

Current User's email address

Recipients

User Integration User

Additional Emails

Created By

Mathand Bhargav Jalasutram, 9/28/2025, 10:23 PM

Modified By

Mathand Bhargav Jalasutram, 9/28/2025, 10:23 PM

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

4.2.3 Alert 2: Payment Confirmation Alert

Setting	Value
Description	Payment Confirmation Alert
Unique Name	Payment_Confirmation_Alert
Object	Payment__c
Email Template	Payment Confirmation

Recipients:

- Statement: Rental Agreement: Renter (Contact)

SETUP

Email Alerts

Email Alert

Payment Confirmation Alert

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

Description

Payment Confirmation Alert

Unique Name

Payment_Confirmation_Alert

From Email Address

Current User's email address

Recipients

User Integration User

Additional Emails

Created By Mathand Bhargav Jalasutram, 9/28/2025, 10:26 PM

Email Template

Payment Confirmation

Object

Payment

Modified By

Mathand Bhargav Jalasutram, 9/28/2025, 10:26 PM

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

5. Workflow Rules

5.1 Statement Due Reminder Workflow

5.1.1 Purpose

Sends automated email reminders 3 days before statement due date.

5.1.2 Navigation Path

Setup → Process Automation → Workflow Rules

PROCESS Automation

Approval Processes

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow Interviews

Post Templates

Process Automation Settings

Process Builder

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Environments

Monitoring

SETUP

Workflow Rules

All Workflow Rules

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

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View:

All Workflow Rules

Create New View

AB C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action

Rule Name +

Description

Object

Active

Edit | Del | Activate

Statement Due Reminder

Send email reminder when statement is due

Statement

☐

AB C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Quick Tips

- Useful Sample Workflow Rule
- Video Tutorial (English Only)
- Troubleshooting Workflow

5.1.3 Rule Configuration

Setting	Value
Object	Statement__c
Rule Name	Statement Due Reminder
Description	Send email reminder when statement is due
Evaluation Criteria	Every time a record is created or edited

SETUP

Workflow Rules

Statement Due Reminder

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

EditDeleteCloneActivate

Rule Name	Statement Due Reminder	Object	Statement
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Send email reminder when statement is due		
Rule Criteria	Statement: Status EQUALS ISSUED		
Created By	Mathand Bhargav Jalasutram, 9/28/2025, 10:36 PM	Modified By	Mathand Bhargav Jalasutram, 9/28/2025, 10:36 PM

Workflow Actions

Edit

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions

[See an example](#)

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

5.1.4 Rule Criteria

Status__c EQUALS Issued

AND

Due_Date__c EQUALS TODAY() + 3

5.1.5 Workflow Actions

Action Type: Email Alert

Selected Alert: Send Rent Due Reminder