

MACK Stores Salesforce CRM Project

Phase 4: Process Automation (Admin)

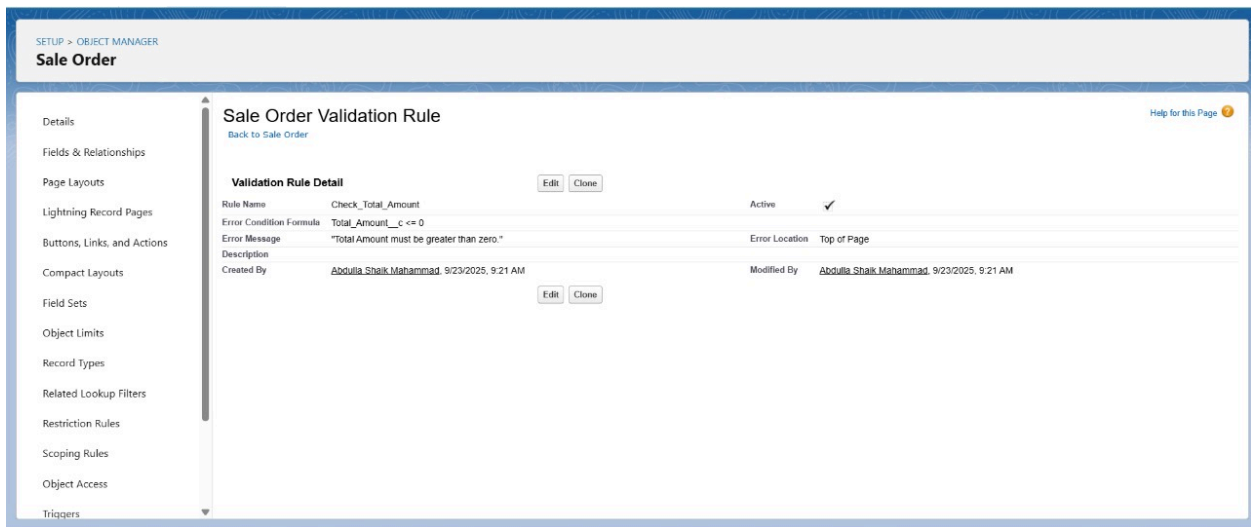
Objective:

Automate business processes using **Salesforce declarative tools** like Validation Rules, Workflow Rules, Process Builder, Flows, and Approval Processes to improve operational efficiency, enforce business logic, and reduce manual errors in MACK Stores' CRM.

1. Validation Rules

Steps:

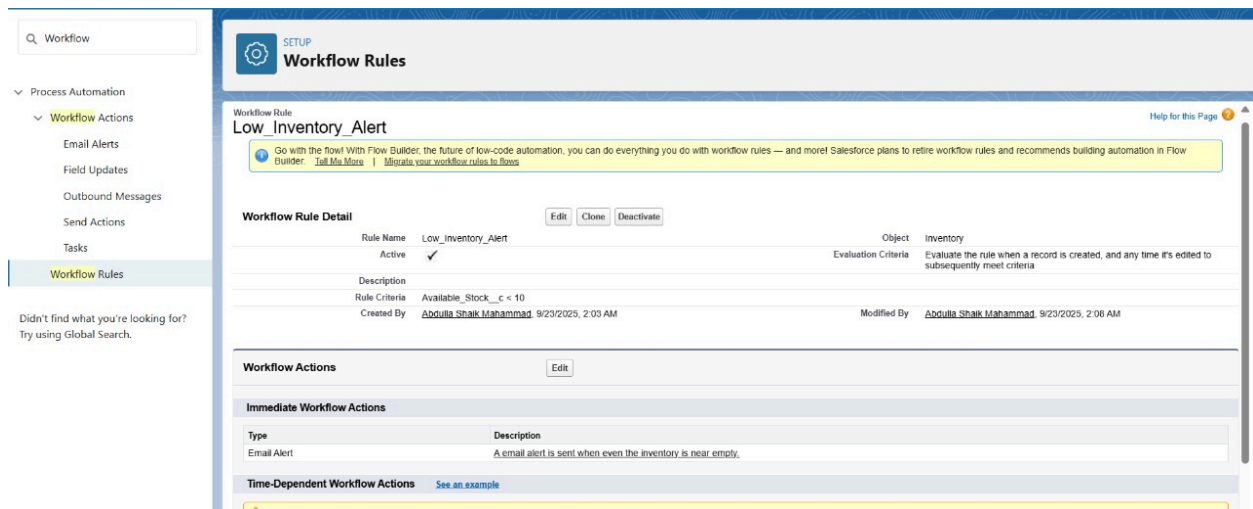
- Go to **Setup** → **Object Manager** → **Sale_Order__c**
- Click **Validation Rules** → **New**
- **Rule Name:** **Check_Total_Amount**
- **Formula:**
Total_Amount__c <= 0
- **Error Message:** **"Total Amount must be greater than zero."**
- Set error location: top of page.
- **Save and Activate**



2. Workflow Rules

Steps:

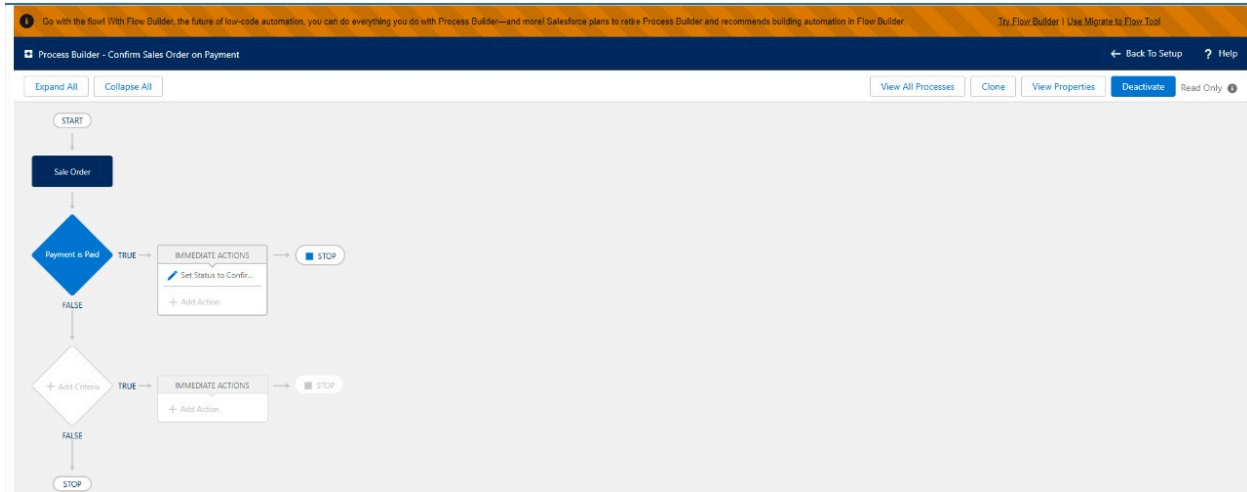
- Go to **Setup** → **Workflow Rules**
- Click **New Rule** → Select **Inventory__c**
- **Rule Criteria:**
Available_Stock__c < 10
- Add **Email Alert** or **Field Update** as action.
- **Save** and **Activate**



3. Process Builder

Steps:

- Go to **Setup** → **Process Builder**
- Click **New** → Select object: **Sales_Order__c**
- Add **criteria:**
[Sales_Order__c].Payment_Status__c == "Paid"
- Add **Field Update** action: Set **Status__c** = "Confirmed"
- **Save** and **Activate**



4. Approval Process

Steps:

- Go to **Setup** → **Approval Processes**
- Choose **Sales_Order__c** as the object
- Define **entry criteria**:
Discount__c > 0.2
- Set up **approval steps**, assign to manager.
- Configure **initial submission actions**, **approval actions**, and **rejection actions**
- Activate process

Approval Processes

Sale Order: Discount Approval

Process Definition Detail

Process Name	Discount Approval	Active	<input type="checkbox"/>
Unique Name	Discount_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	Approval required for discounts > 20%		
Entry Criteria	Sale Order: Discount GREATER THAN 0.2		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Sales: New Customer Email		
Initial Submitters	Sale Order Owner		
Created By	Abdulla Shaik Mahammad	Modified By	Abdulla Shaik Mahammad

Initial Submission Actions

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited

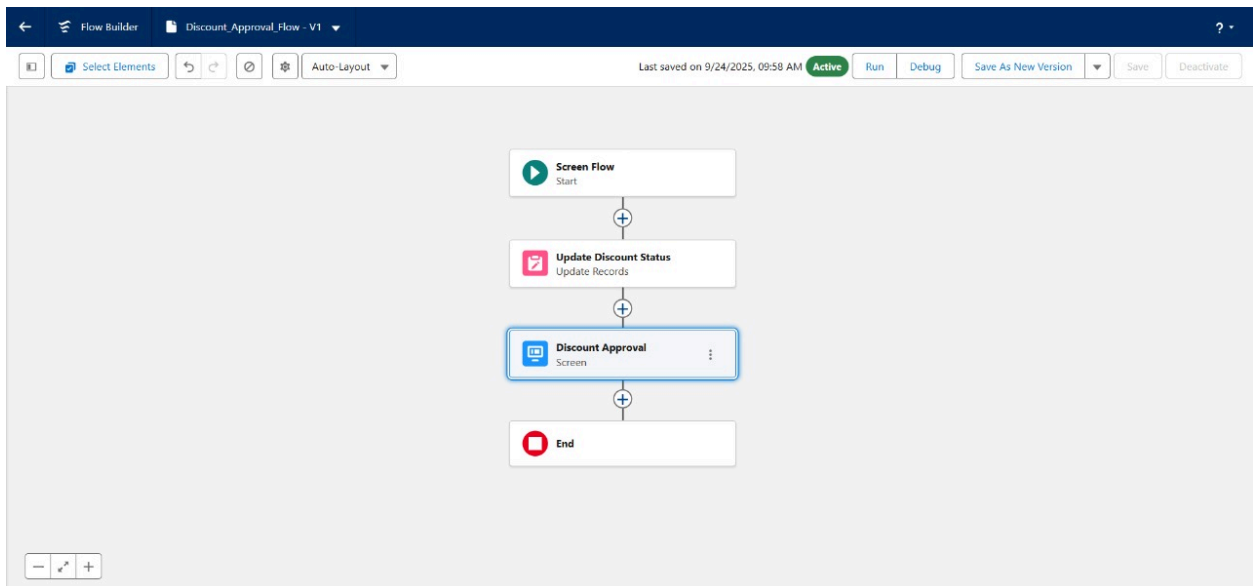
Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Discount	1	Discount			Manager	Final Rejection

5. Flow Builder

Steps:

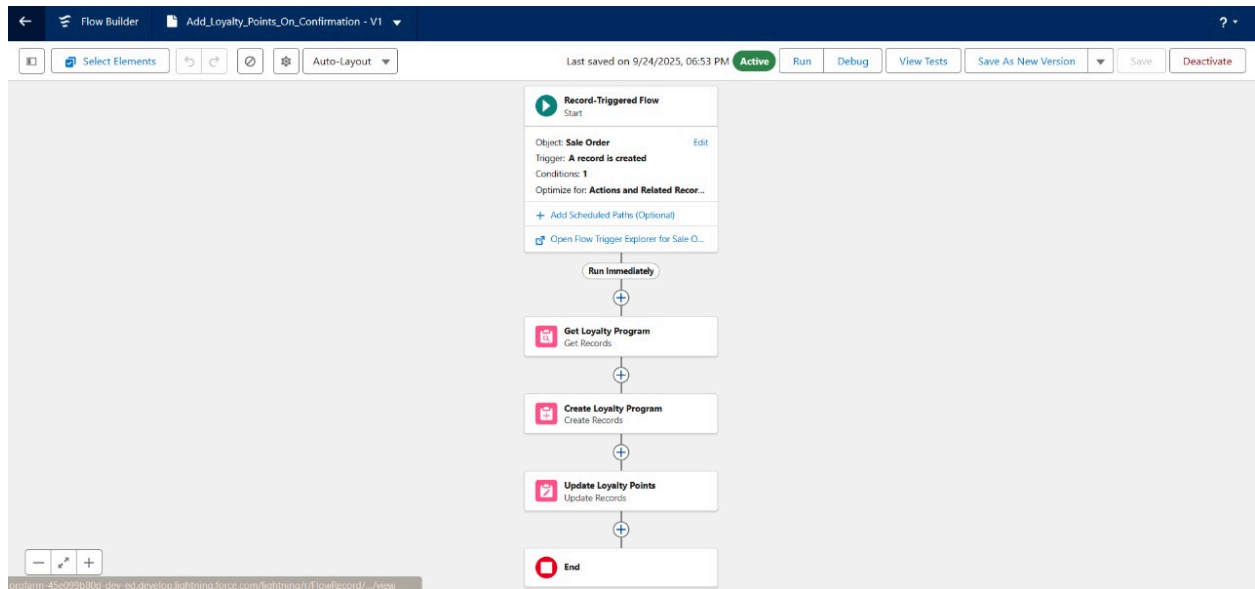
- Go to **Setup** → **Flow** → **New Flow** → Select **Screen Flow**
- Add **Get Records** element to fetch `Sales_Order__c`
- Add **Screen** with:
 - Display text: "Discount Approval ?"
 - Radio buttons: Approve / Reject
- Add **Update Records** to modify `Approval_Status__c` based on input
- Connect: Start → Get Records → Screen → Update Records → End
- **Debug**, **Save**, and **Activate**



b. Record-Triggered Flow

Steps:

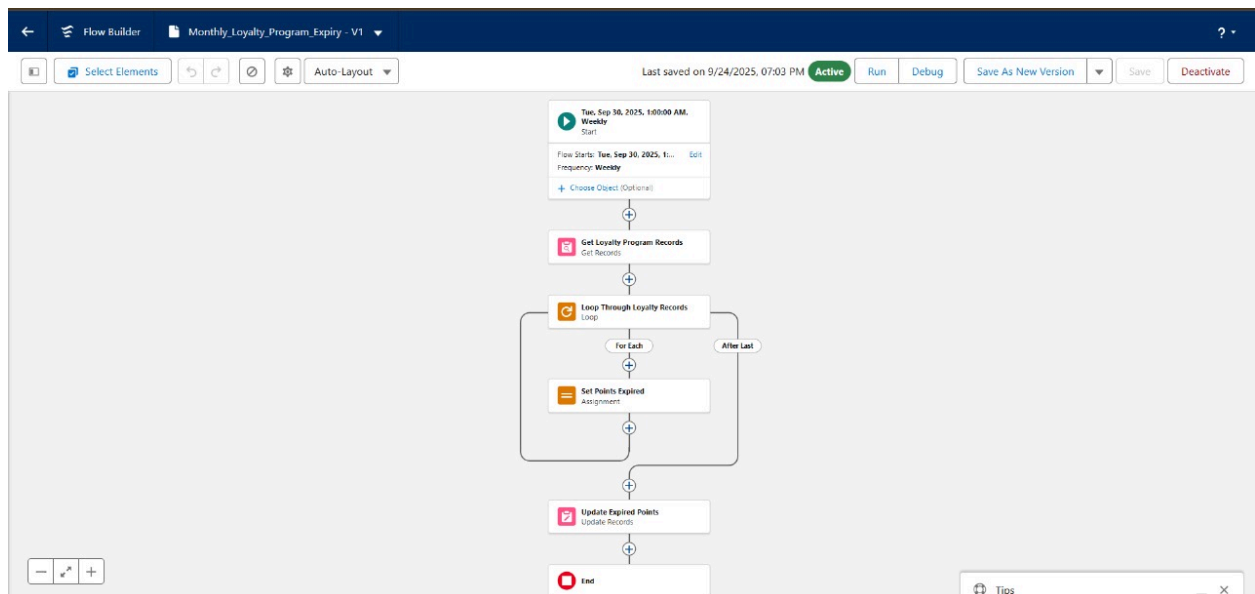
- New **Record-Triggered Flow** on `Sales_Order__c`
- Trigger condition: `Status__c == "Confirmed"`
- Action: Create or update `Loyalty_Program__c` record



c. Scheduled Flow

Steps:

- New **Scheduled Flow**
- Frequency: Weekly
- Query: `Loyalty_Program__c` records
- Action: Update `Points_Expired__c` or notify users



6. Custom Notifications & Tasks

- **Use Case:** Notify store manager when a large order is placed.
 - Use **Process Builder** or **Flow** to send a **Custom Notification**.
 - Add a **Create Task** action for the follow-up.
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7. Testing & Debugging

- Use the **Debug** button in Flow Builder to simulate inputs and outputs.
 - Test each automation with sample data.
 - Review **Email Logs** and **Debug Logs** for any failures.
 - Validate business rules are enforced as expected.
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