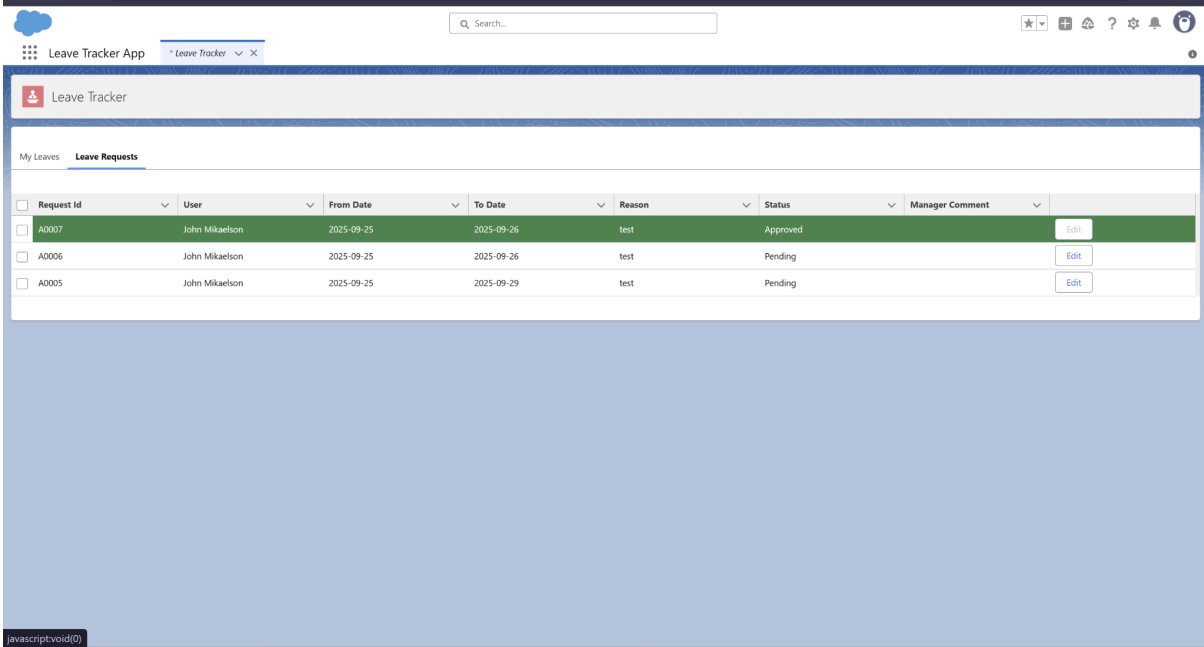


Phase 4: Process Automation (Admin)

1. Validation Rules

Ensures correct data entry and prevents invalid records.

- **Date Validation**
End Date must always be later than Start Date.
 $\text{End_Date_c} < \text{Start_Date_c}$
→ Error message: "End Date cannot be before Start Date."
- **Reason Required**
Employees must provide a reason before submitting their leave request.



The screenshot shows a web application titled "Leave Tracker App" with a search bar and navigation icons. The main content area is titled "Leave Tracker" and contains a tabbed interface with "My Leaves" and "Leave Requests". The "Leave Requests" tab is active, displaying a table with the following data:

<input type="checkbox"/>	Request Id	User	From Date	To Date	Reason	Status	Manager Comment	
<input type="checkbox"/>	A0007	John Mikaelson	2025-09-25	2025-09-26	test	Approved		Edit
<input type="checkbox"/>	A0006	John Mikaelson	2025-09-25	2025-09-26	test	Pending		Edit
<input type="checkbox"/>	A0005	John Mikaelson	2025-09-25	2025-09-29	test	Pending		Edit

2. Workflow Rules

Automatically handles updates when a leave request is created.

- **Auto-update Status:**
On submission, the request status is set to "Under Review."
- **Actions:**
 - Send email notification to the Manager.
 - Update Status field to "Submitted."

3. Process Builder

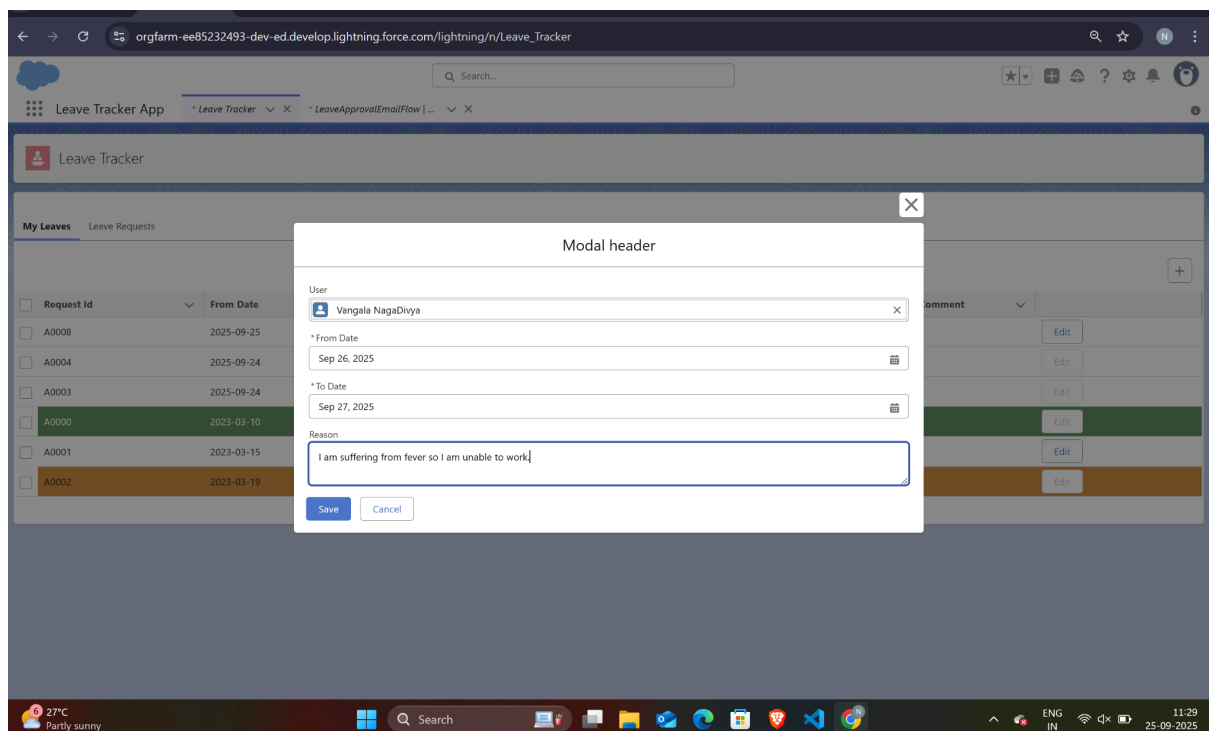
Handles conditional automation beyond workflow rules.

- If Status = **Approved** → Send email to employee with approval confirmation.
- If Status = **Rejected** → Send email with rejection reason and manager comments.

4. Flow Builder

Screen flows guide employees through leave request submission.

- **Steps:**
 1. Select Leave Type.
 2. Choose Start and End Dates.
 3. Provide Reason for leave.
 4. Review details & Submit.

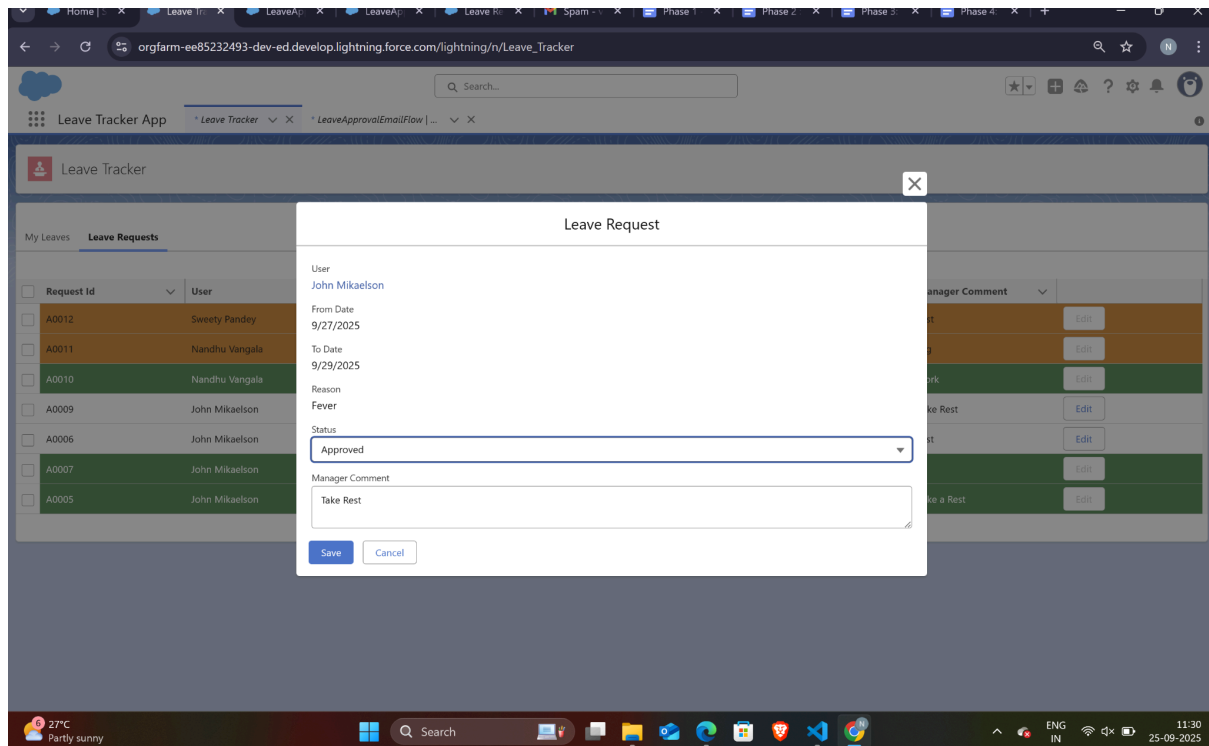


5. Approval Process

Streamlines request approval.

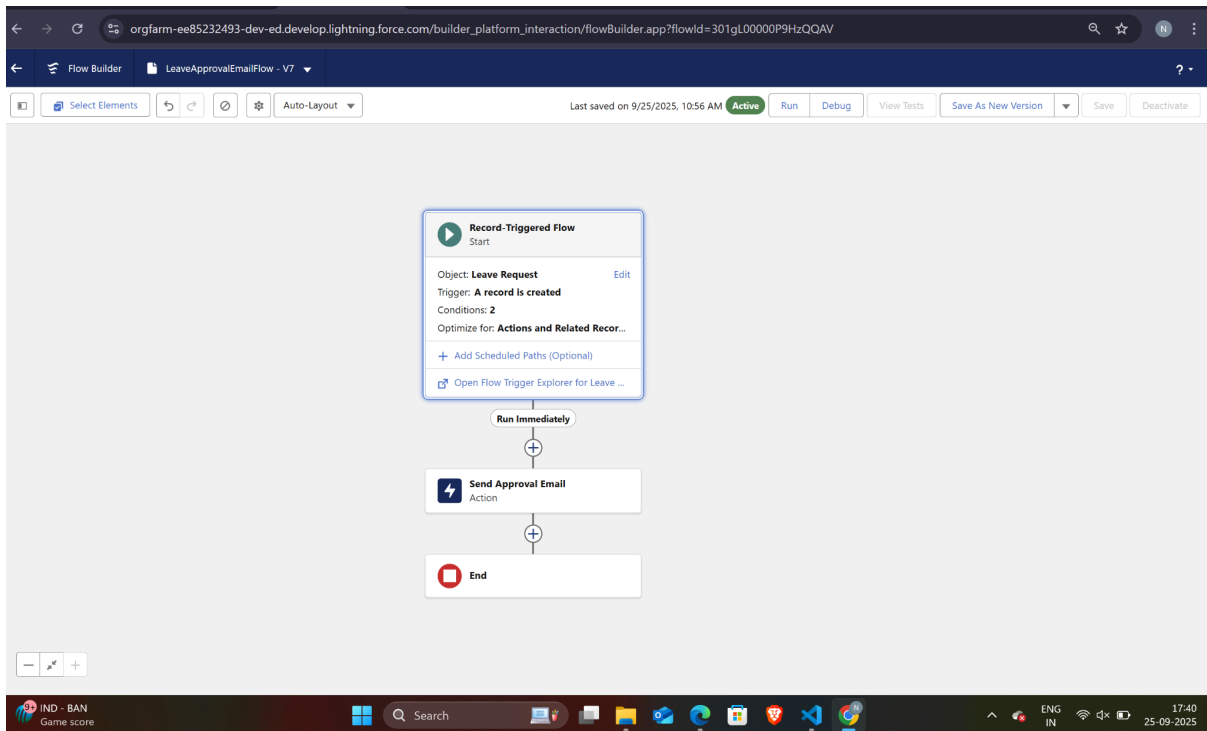
1. Employee submits request → Status = **Pending**.
2. Manager receives approval request.
3. Manager approves or rejects.
4. If approved → Email sent to employee.

5. If rejected → Rejection email sent to employee.



6.Email Flows

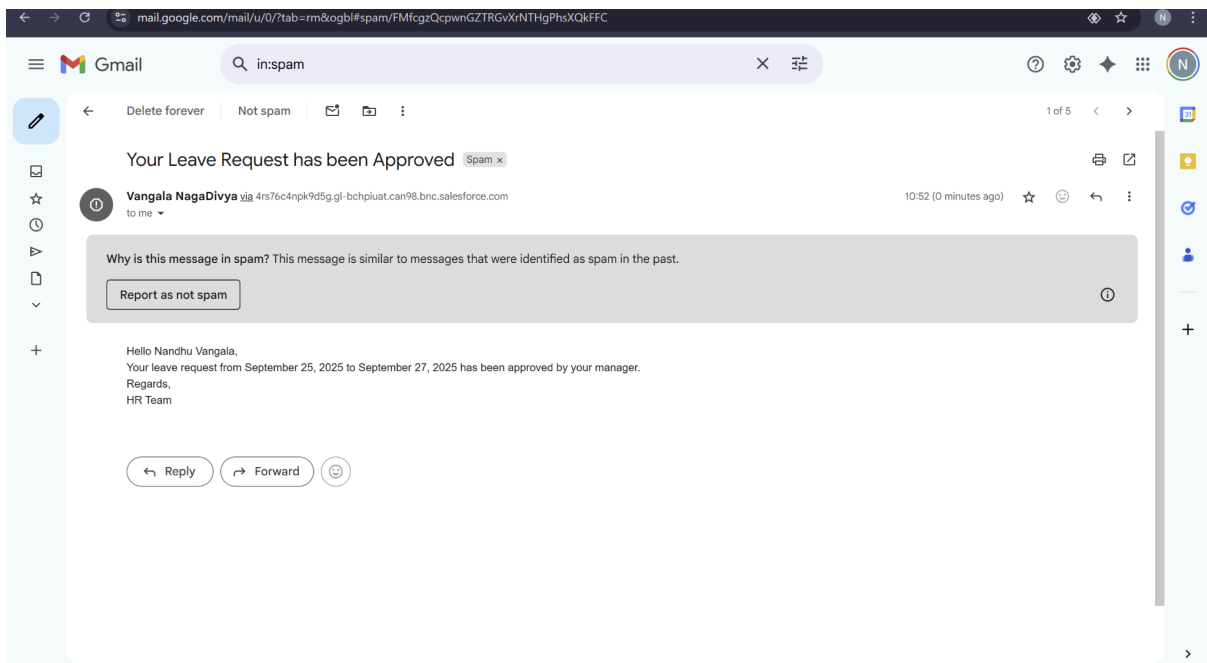
- Click Setup ()→ Quick Find→ Flows New Flow.
- Select Record-Triggered Flow.
- Choose Object: Leave_Request_Status_Notification → Trigger: When record is created→ After Save.
- Add Action Send Email Select Welcome Email Template.
- Save and Activate.



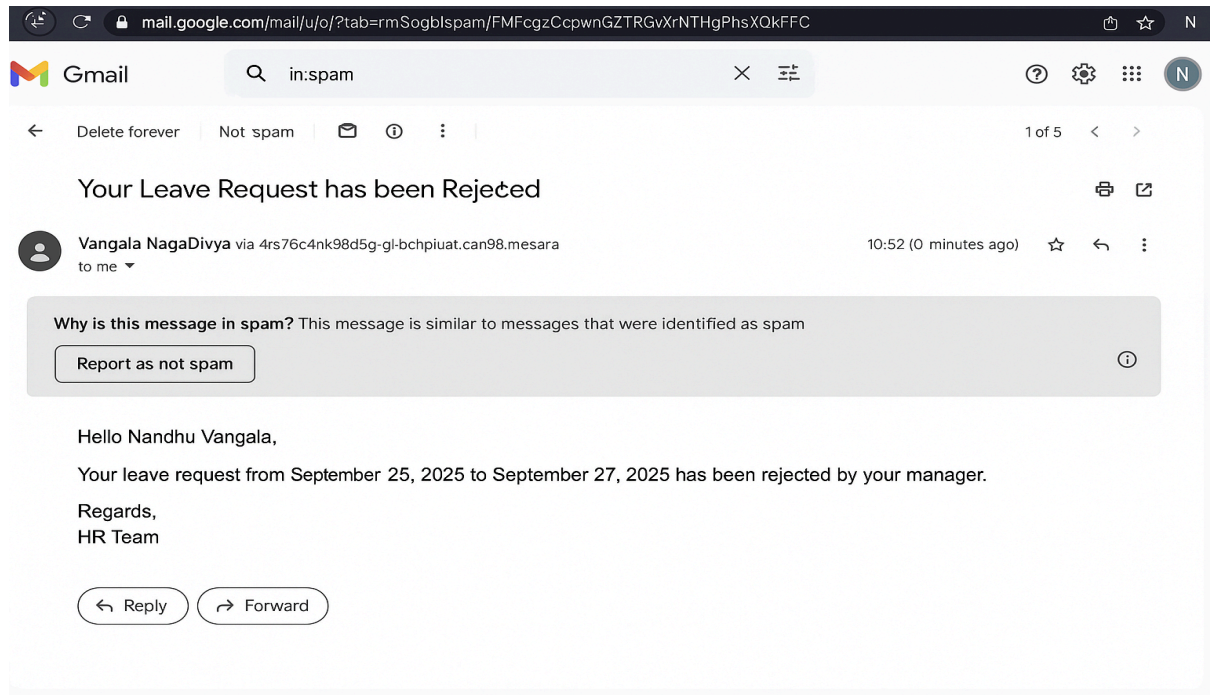
7. Email Alerts

Automated notifications keep everyone updated.

- Leave Request Submitted → Sent to Manager.
- Leave Request Approved → Sent to Employee.



- Leave Request Rejected → Sent to Employee.



- Leave Balance Reminder → Monthly email to Employee.

8. Field Updates

Ensures status fields stay in sync with actions.

- On Approval: **Status** → **Approved**.
- On Rejection: **Status** → **Rejected**.
- On Cancellation: **Status** → **Cancelled**.

9. Tasks & Custom Notifications

Keeps managers and employees on track.

- Task auto-created for managers to review requests.
- Custom Notification (via Salesforce App) → Push notification when a request is assigned.

Phase 4 Outcome:

- All leave management processes (submission, approval, rejection, cancellation) automated.
- Real-time notifications for employees and managers.
- HR/Admin enjoy complete visibility with minimal manual work.