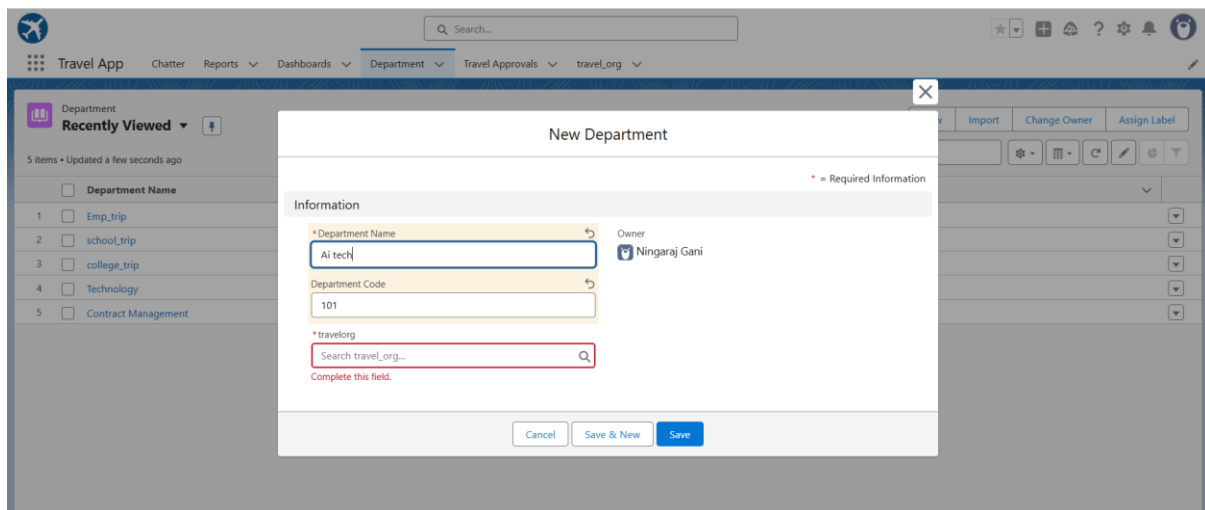


Phase 4: Process Automation (Admin)

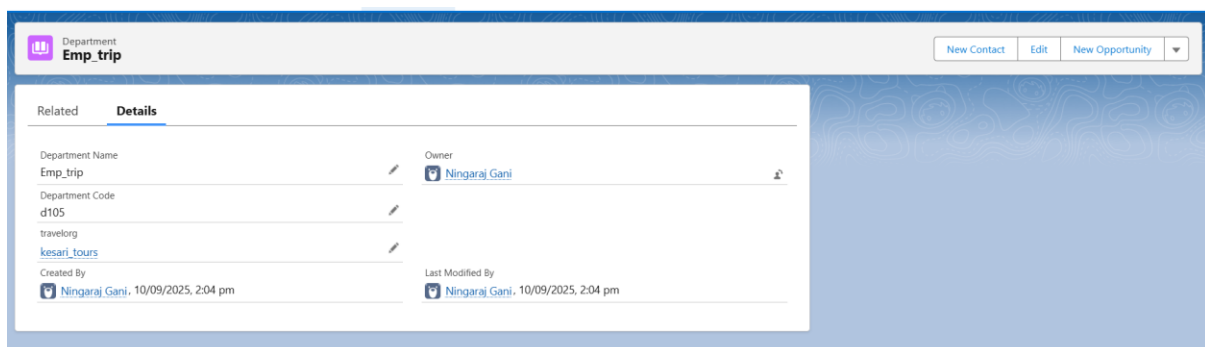
1. Validation Rules

- **Use Case:** Ensure data entered by users meets specific criteria before saving.
 - Example: A travel request cannot be submitted if the travel department does not add travel Organizer name.
- **Implementation:** Create a validation rule on the Travel Request object.



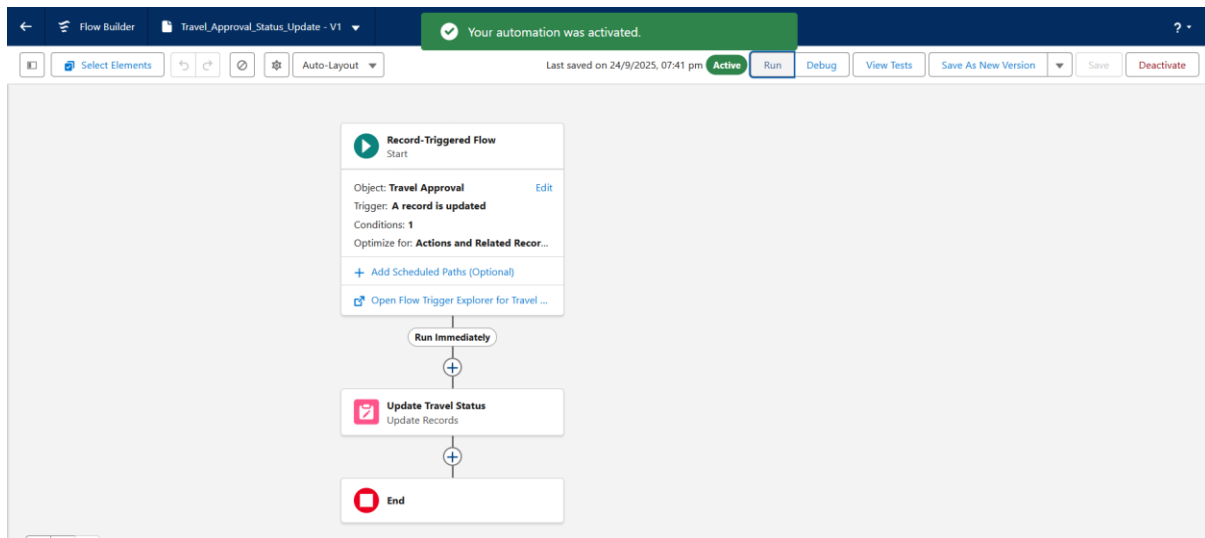
2. Workflow Rules

- **Use Case:** Automate standard actions when certain criteria are met.
 - Example: When a travel request is approved, automatically send an email to the employee.
- **Implementation:** Set up a workflow on the Travel Request object, with a condition like Status = Approved.
- **Actions:** Email alerts, field updates, tasks.



3. Process Builder

- **Use Case:** Automate complex processes with multiple if-then conditions.
 - Example: If a travel request exceeds \$1000, notify both the manager and finance team.
- **Implementation:** Build a process on the Travel Request object, define criteria and actions.



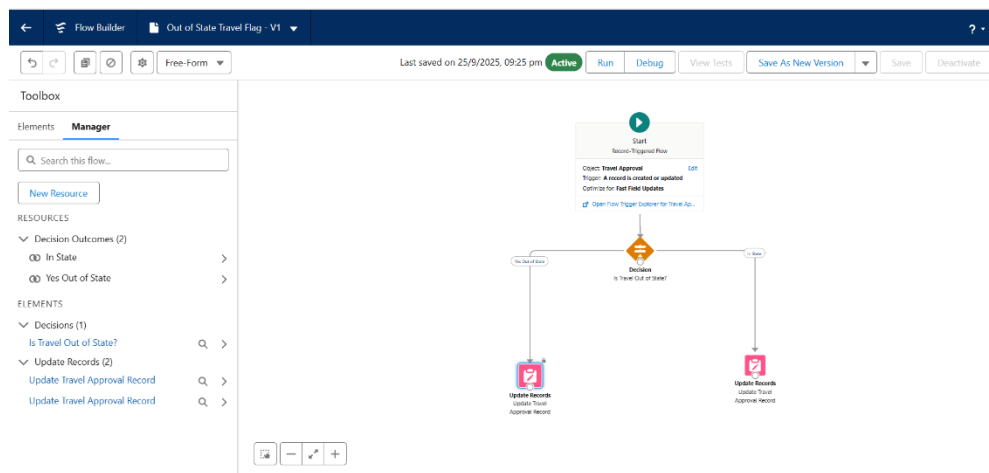
4. Approval Process

- **Use Case:** Route requests for approval based on specific conditions.
 - Example: Travel requests above a certain budget require manager approval before submission.
- **Implementation:** Configure an approval process on the Travel Request object. Define entry criteria, approval steps, and final actions.

The screenshot shows the Salesforce Setup page for "Approval Processes". The page title is "Approval Submission: Travel Request Approval". Below the title, there are links for "Back to Approval Process List" and "Help for this Page". The "Process Definition Detail" section includes fields for "Process Name" (Travel Request Approval), "Unique Name" (Travel_Request_Approval), "Description", "Entry Criteria" (Approval Submission: Status EQUALS Approved), "Record Editability" (Administrator OR Current Approver), "Approval Assignment Email Template" (Sales: New Customer Email), "Initial Submitters" (Approval Submission Owner), "Created By" (Ningaraj Ganji, 24/09/2025, 7:57 pm), and "Modified By" (Ningaraj Ganji, 24/09/2025, 7:57 pm). The "Initial Submission Actions" section shows a table with one action: "Record Lock" with the description "Lock the record from being edited". The "Approval Steps" section shows a message: "You have not yet defined any approval steps".

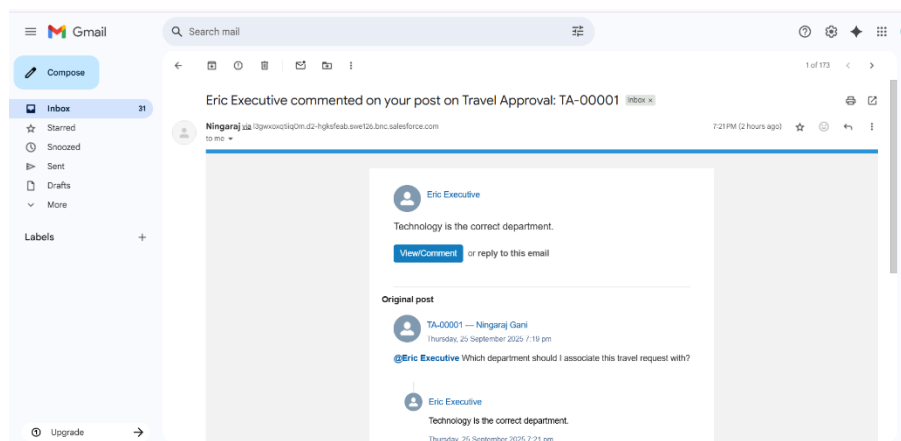
5. Flow Builder

- **Use Case:** Automate both simple and complex business processes.
 - **Types of Flows in your project:**
 1. **Screen Flow:** Employee submits a travel request using a guided form.
 2. **Record-Triggered Flow:** Automatically update request status when a manager approves it.
 3. **Scheduled Flow:** Send weekly summary emails of all pending travel requests.
 4. **Auto-launched Flow:** Update related records automatically, e.g., update employee travel balance.



6. Email Alerts

- **Use Case:** Notify users automatically via email.
 - Example: Notify the manager when a travel request is submitted.
- **Implementation:** Create an email alert and associate it with workflow, process, or flow.



7. Field Updates

- **Use Case:** Automatically update fields based on conditions.
 - Example: Change the status of travel request from Submitted to Approved after manager approval.
- **Implementation:** Use workflow or process builder to update the field.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', and 'ADMINISTRATION' (with sub-items 'Users', 'Data', and 'Email'). The main content area is titled 'Field Updates' and contains a form for 'Edit Field Update' with the title 'Set Status to Approved'. Below the title is a descriptive text: 'Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.' The form has three main sections: 'Identification', 'Specify New Field Value', and 'Picklist Options'. The 'Identification' section includes fields for 'Name' (Set Status to Approved), 'Unique Name' (Set_Status_to_Approved), 'Description', 'Object' (Travel Approval), 'Field to Update' (Status), 'Field Data Type' (Picklist), and a checkbox for 'Re-evaluate Workflow Rules after Field Change'. The 'Specify New Field Value' section is currently empty. The 'Picklist Options' section is also empty. At the top right of the form are buttons for 'Save', 'Save & New', and 'Cancel'. A red error message 'Required Information' is visible next to the 'Name' and 'Unique Name' fields.

8. Tasks

- **Use Case:** Automatically create tasks for users.
 - Example: Assign a follow-up task to the finance team after a travel request is approved.
- **Implementation:** Use workflow or process builder to create a task.

The screenshot shows the 'New Task' form in Salesforce. The form has a title bar with a menu icon, the text 'New Task', and window control icons (minimize, maximize, close). The form contains several input fields: 'Subject' (a text field with a search icon), 'Due Date' (a date picker), 'Name' (a text field with a user icon and a search icon), and 'Related To' (a dropdown menu showing 'TA-00001' with a close icon). At the bottom of the form is a red asterisk followed by the text '* Assigned To' and a blue 'Save' button.

9. Custom Notifications

- **Use Case:** Alert users within Salesforce without emails.
 - Example: Notify an employee instantly when their travel request is approved or rejected.
- **Implementation:** Configure custom notifications and trigger them using process builder or flow.

