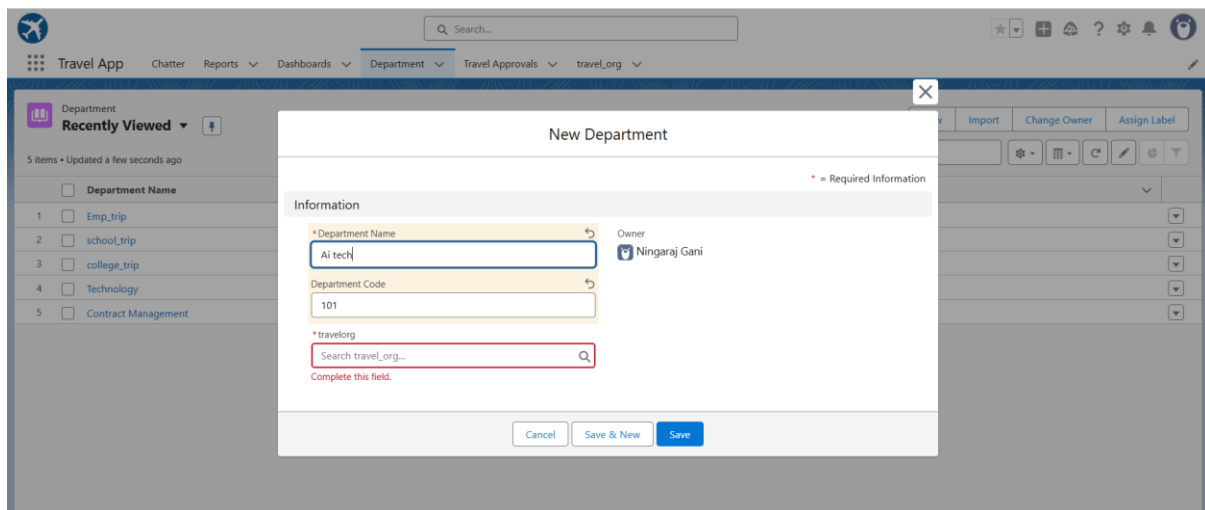# Phase 4: Process Automation (Admin)
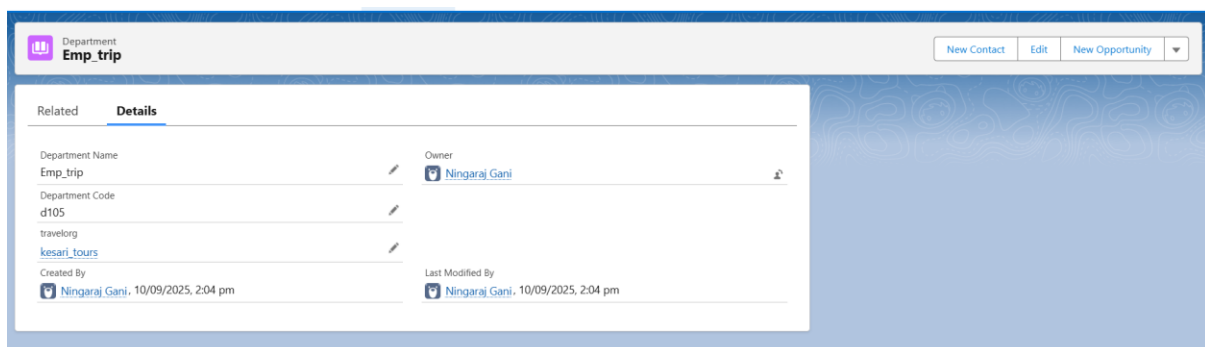
1. Validation Rules

- **Use Case:** Ensure data entered by users meets specific criteria before saving.

    o 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.

    o 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.
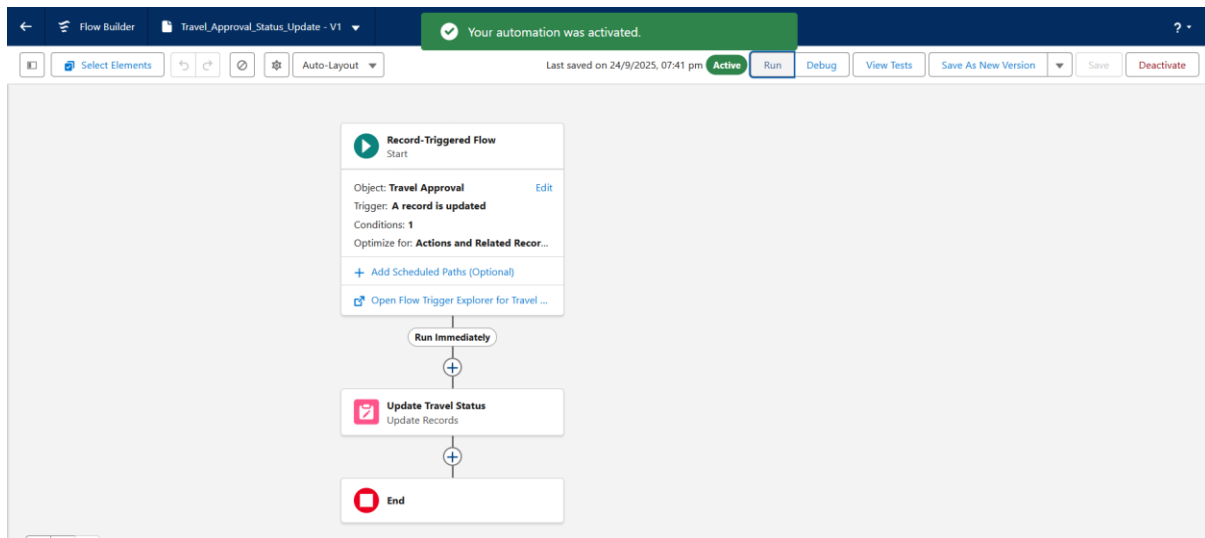

4. Approval Process

- **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.

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.
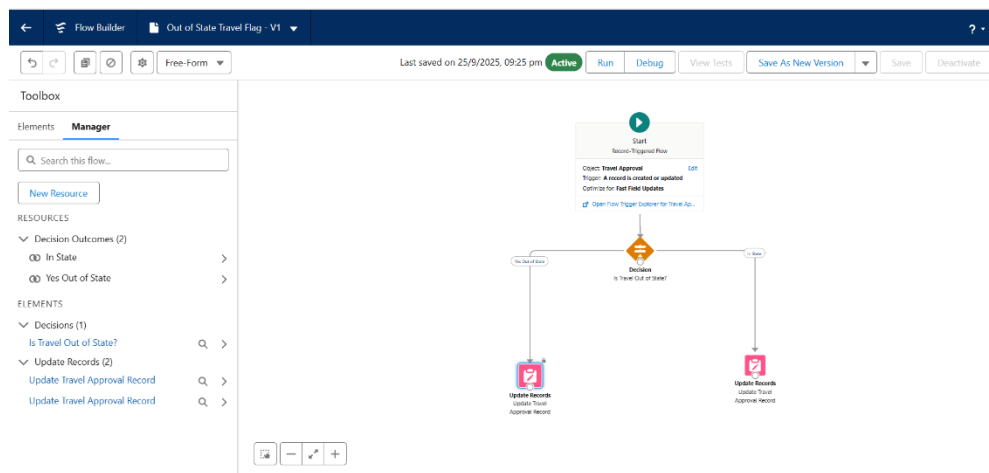
6. Email Alerts

- **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.
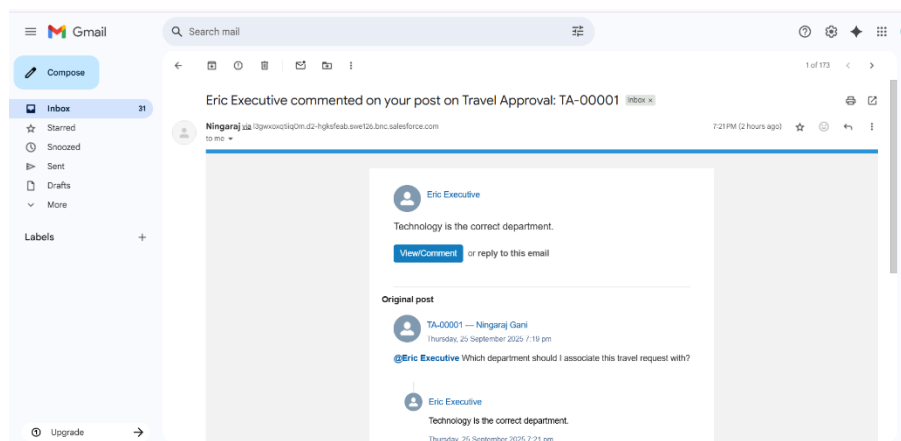
7. Field Updates

- **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.

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.

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.