

Phase 4 : Process Automation (Admin)

1. Validation Rules

Validation Rules enforce data integrity by preventing users from saving records with invalid values.

Purpose: Ensure data integrity and prevent incorrect data entry.

Examples for Contact Training Tracker:

- Attendance cannot exceed session capacity:
 - Object: **Training Session**
 - Rule: $\text{Number_of_Attendees_c} \leq \text{Session_Capacity_c}$
 - Error Message: "Attendees cannot exceed session capacity."
- Certificate cannot be issued without attendance:
 - Object: **Certificate**
 - Rule: $\text{ISBLANK(Attendance_c)}$
 - Error Message: "Cannot issue certificate without attendance record."

SETUP

Object Manager

Training Session Validation Rule

Back to Training Session

Help for this Page

Validation Rule Detail

Edit

Clone

Active

✓

Rule Name	Attendees_Cannot_Exceed_Capacity	Error Condition Formula	Number_of_Attendees__c > Session_Capacity__c
Error Message	The number of attendees cannot exceed the session capacity.		Error Location
Description	Top of Page		
Created By	Vansh Balli	9/23/2025, 6:10 AM	Modified By
			Vansh Balli
			9/23/2025, 6:10 AM

Edit

Clone

SETUP

Object Manager

Certificate Validation Rule

Back to Certificate

Validation Rule Detail

Edit

Clone

Active

✓

Rule Name	Certificate_Requires_Attendance	Error Condition Formula	ISBLANK(Attendance__c)
Error Message	A certificate cannot be issued without an attendance record.		Error Location
Description	Top of Page		
Created By	Vansh Balli	9/23/2025, 6:18 AM	Modified By
			Vansh Balli
			9/23/2025, 6:18 AM

Edit

Clone

2. Workflow Rules

Purpose: Automate simple actions when certain criteria are met.

Example:

Send email reminder 1 day before training session

- Object: **Training Session**
- Criteria: `Start_Date__c = TODAY() + 1`
- Actions:
 - Email Alert to Contact/Trainer

Steps :

- Setup → Workflow Rules → New Rule → Select Object
- Define Criteria
- Add Workflow Action (Email Alert / Field Update / Task)
- Activate

The screenshot shows the Salesforce 'Workflow Rules' setup page for a rule named 'Training Session Reminder'. The page includes a 'Workflow Rule Detail' section with fields for Rule Name, Object (Training Session), Active status, Description, Rule Criteria (`Start_Date__c = TODAY() + 1`), and Created/Modified by information. Below this is the 'Workflow Actions' section, which shows 'Immediate Workflow Actions' with one action: 'Email Alert' with the description 'Training_Session_Reminder_Alert'. A message at the bottom states: 'You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited".' The page also features a 'Go with the flow' banner at the top and an 'Edit' button at the bottom.

3. Process Builder

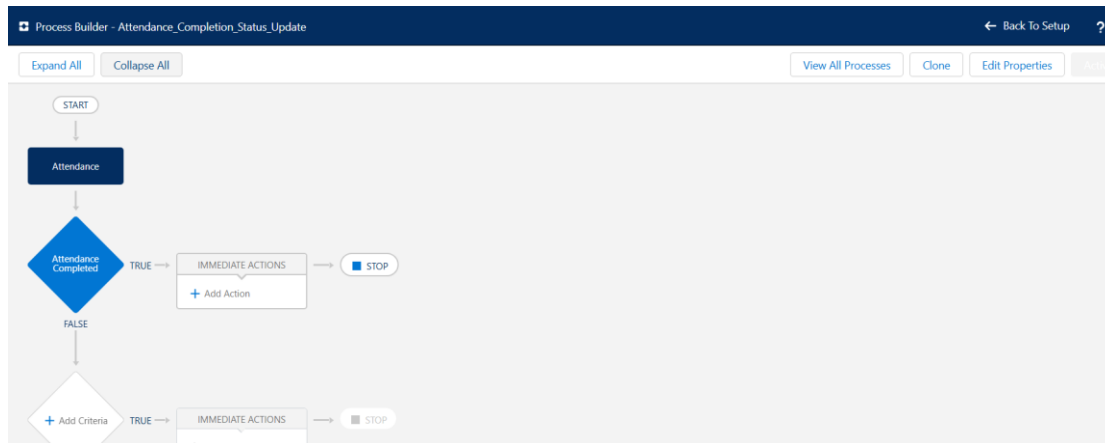
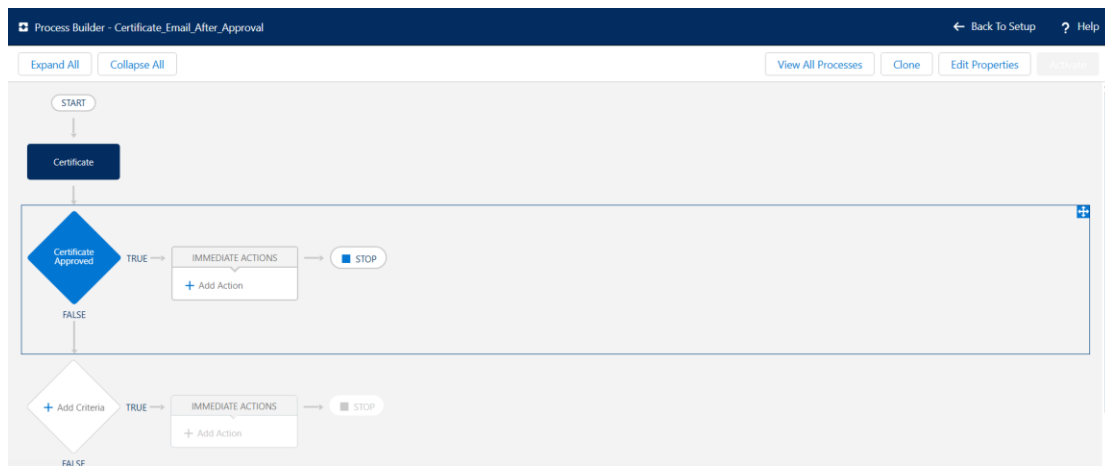
Purpose: Automate multi-step processes based on record changes.

Example:

- Update training status when attendance is recorded
 - Object: **Attendance**
 - Criteria: Record is created/updated & Status__c = 'Completed'
 - Action: Update related **Contact Training Record** → Training_Status__c = 'Completed'

Steps :

- Setup → Process Builder → New
- Select Object & Trigger
- Add Criteria & Actions
- Activate



4. Approval Process

Purpose: Automate approvals (e.g., certificate issuance).

- Certificate issuance requires manager approval if score < 50%

- Object: **Certificate**
- Criteria: Score__c < 50
- Approval Steps: Manager approval → Notify trainee → Final approval → Issue certificate

Steps :

- Setup → Approval Processes → New Approval Process
- Select Object → Use Standard Setup Wizard
- Define Entry Criteria, Approvers, Actions
- Activate

Approval Processes

Account: Certificate_Approval_Process

Process Definition Detail

Process Name	Certificate_Approval_Process	Active	<input type="checkbox"/>
Unique Name	Certificate_Approval_Process	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Account Owner	Modified By	Yansh Ball: 9/23/2025, 7:51 AM
Created By	Yansh Ball: 9/23/2025, 7:50 AM		

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

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

5. Flow Builder

Flows are **modern, flexible automation tools**.

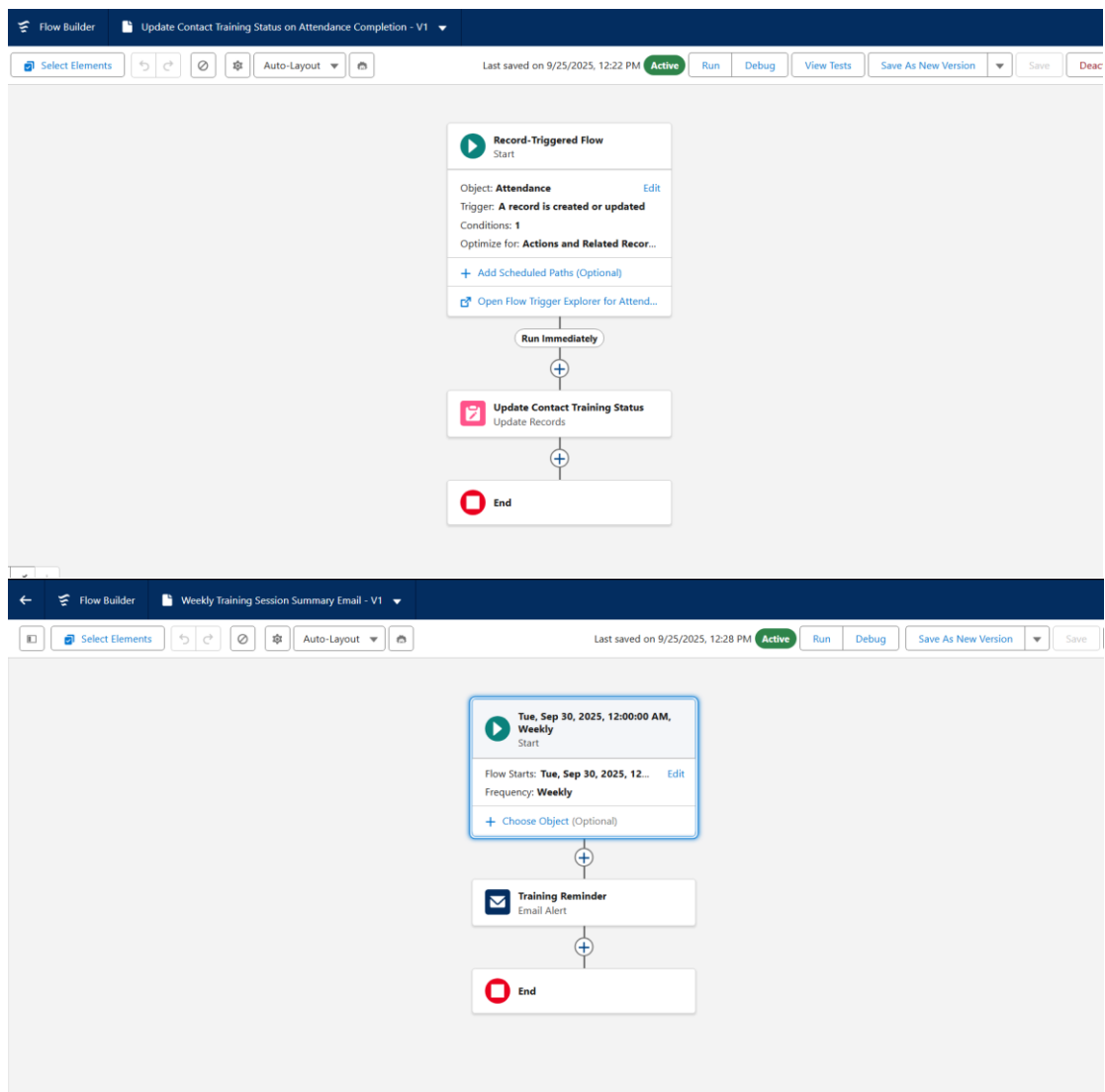
Types:

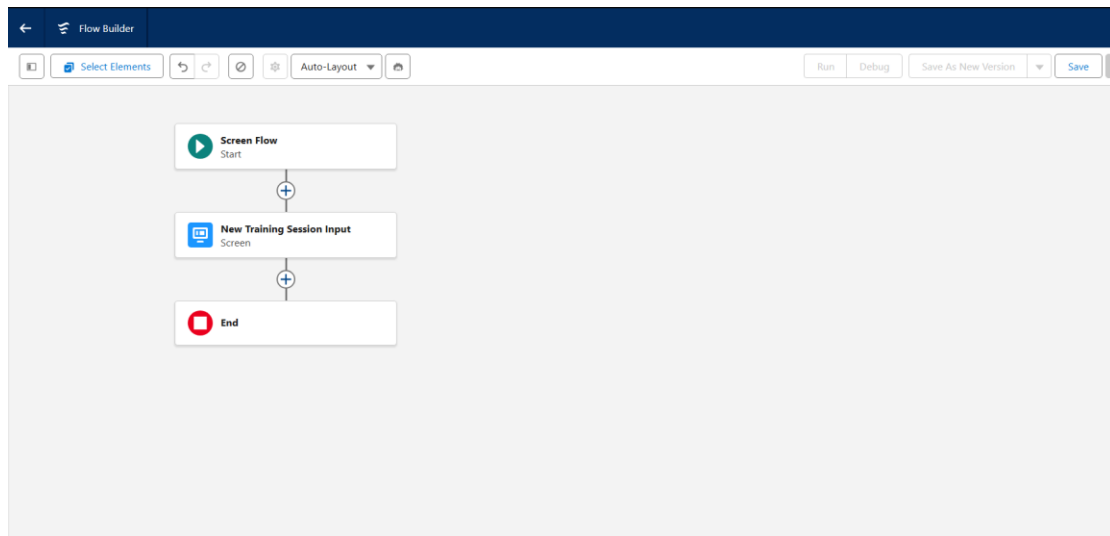
- **Screen Flow:** User-guided forms (e.g., manually add a training session)
- **Record-Triggered Flow:** Automatically triggers on create/update/delete
 - Example: Mark **Contact** as “Trained” when Attendance is recorded
- **Scheduled Flow:** Runs at a set time

- Example: Weekly summary report emailed to training manager
- **Auto-launched Flow:** Can be triggered by Process Builder or Apex
 - Example: Auto-create a Certificate when training is completed

Steps for Record-Triggered Flow Example:

- Setup → Flow → New Flow → Record-Triggered Flow
- Select **Object** = Attendance
- Trigger = **A record is created or updated**
- Define **Criteria** = Status__c = 'Completed'
- Action = Update **Contact Training Record** → Training_Status__c = 'Completed'
- Save → Activate





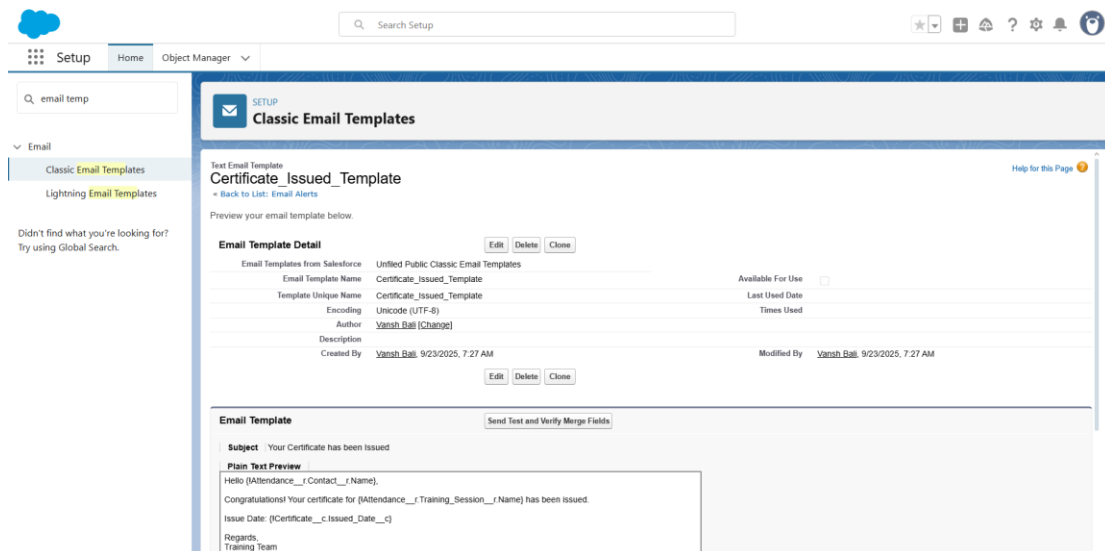
6. Email Alerts

Purpose: Notify users automatically.

- Email trainee a confirmation after registering for a session
- Email trainer when attendance is marked as complete

Steps :

- Create Email Template → Setup → Classic Email Templates / Lightning Email Templates
- Use Workflow/Process Builder/Flow → Add Email Alert



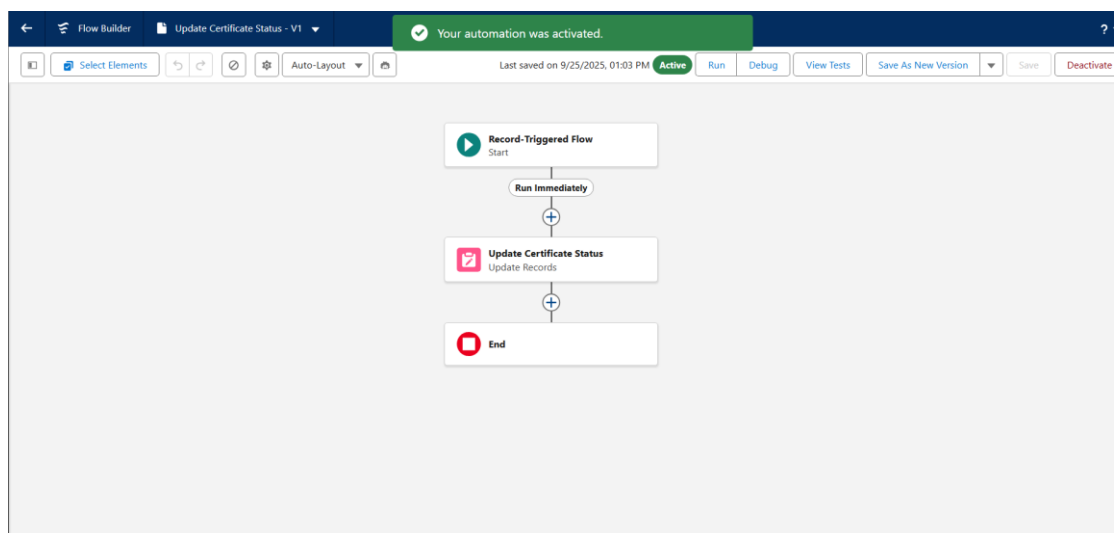
7. Field Updates

Purpose: Automatically update fields based on criteria.

- Update **Training Status** on Contact when Attendance = Completed
- Mark **Certificate Status** as “Issued” once approval is complete

Steps :

- Use Workflow, Process Builder, or Flow → Action → Update Records



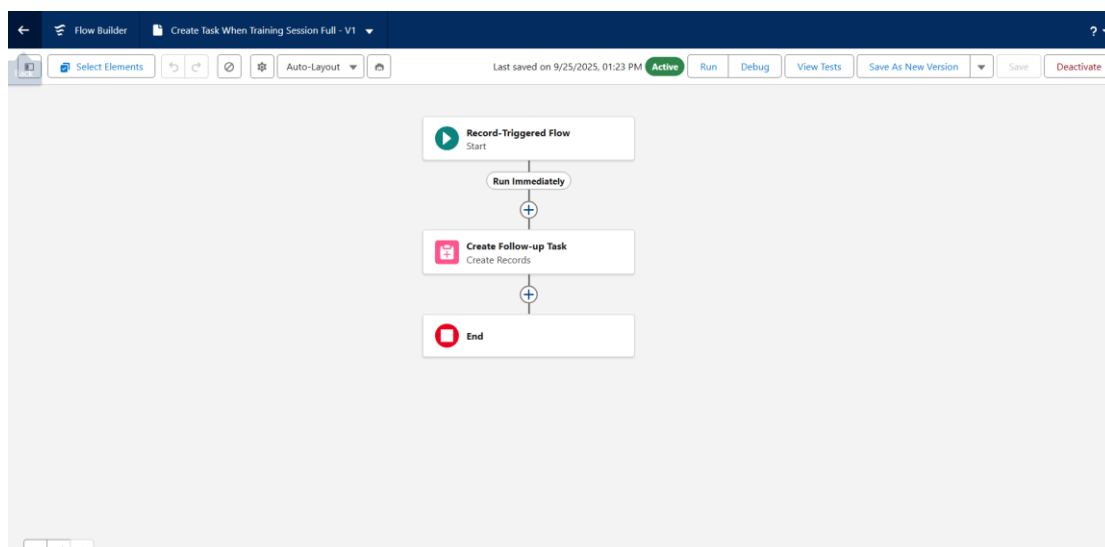
8. Tasks

Purpose: Automatically create tasks for users.

- Task for trainer to **follow up** after a training session
- Task for manager to **approve certificate**

Steps :

- Workflow / Process Builder / Flow → Action → Create Task



9. Custom Notifications

Purpose: Send alerts inside Salesforce.

- Notify training manager when a new Attendance record is logged
- Notify trainee when certificate is issued

Steps :

- Setup → Custom Notifications → New
- Create Flow / Process Builder → Action = Send Custom Notification