

# Phase 4 — Process Automation

**Objective:** Automate PO approval, vendor notifications, and rating updates in Salesforce.

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## Key Automations

### 1. Validation Rule

- **Purpose:** Prevent duplicate POs for the same vendor on the same date.
  - **Rule Name:** Prevent\_Duplicate\_PO
  - **Error Message:** "Duplicate PO for the same vendor and date is not allowed."
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### 2. Workflow Rule

- **Purpose:** Auto-email vendor upon PO approval.
  - **Rule Name:** PO\_Approval\_Email
  - **Action:** Email alert to Vendor Email using PO\_Approval\_Notification template
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### 3. Process Builder

- **Purpose:** Auto-update Vendor Rating after 3 completed POs.
  - **Process Name:** Update\_Vendor\_Rating
  - **Action:** Update Vendor\_\_c.Rating\_\_c to "A"
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### 4. Approval Process

- **Purpose:** Require manager approval for high-value POs (> ₹5,00,000)
  - **Name:** High\_Value\_PO\_Approval
  - **Actions:** Approval → Status = Approved, Rejection → Status = Rejected
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### 5. Flow Builder

- **Record-Triggered Flow:** Auto-create task for Finance when PO is approved
  - **Screen Flow:** Guided PO creation wizard for users
  - **Scheduled Flow:** Daily reminders for pending approvals
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## Sample Data

PO Name	Vendor	Amount	Status	Approval Status
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PO-001	Vendor A	1,00,000	Draft	Not Submitted
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PO-002	Vendor A	6,00,000	Submitted	Pending
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PO-003	Vendor B	3,00,000	Submitted	Approved
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Vendor	Rating	Compliance
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Vendor A	A	Compliant
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Vendor B	B	Pending
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### Process Flow Overview

1. **Create PO** → Validation Rule checks for duplicates
  2. **Submit PO** → High-value PO triggers Approval Process
  3. **Approval Completed** → Workflow Rule emails Vendor → Record-triggered Flow creates task for Finance
  4. **Vendor completes 3 POs** → Process Builder updates Vendor Rating
  5. **Scheduled Flow** → Sends reminders for pending approvals
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### Deliverable

- Fully automated PO approval and notification system in Salesforce
  - Ensures data integrity, timely notifications, and automated vendor rating updates
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Setup

Home

Object Manager

work

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

User Interface

Console Settings

Workspace Page

Loading Preference

Translation Workbench

Export

Import

Translate

Translation Language Settings

Security

SETUP

Workflow Rules

All Workflow Rules

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.
[Tell Me More](#)
[Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: All Workflow Rules

Create New View

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Deactivate</a>	PO_Approved_Email	Send email to PO Owner when Purchase Order status is approved	Purchase Order	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Deactivate</a>	PO_Approved_Email_Workflow		Purchase Order	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Deactivate</a>	PO_Approved_Email_Workflow_c		Purchase Order	<input type="checkbox"/>

Quick Tips

- Useful Sample Workflow Rule
- Video Tutorial (English Only)
- Troubleshooting Workflow

Setup

Home

Object Manager

Data

Mass Transfer **Approval Requests**

Feature Settings

Approval Settings

Process Automation

**Approval Processes**

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Try using Global Search.

SETUP

Approval Processes

Open Approvals App

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the [help topic](#)
2. View the [checklist](#)
3. Create a custom user [hierarchical relationship field](#)
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For:

Purchase Order

A listing of both active and inactive approval processes for **Purchase Orders** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

Recorder

No approval processes available

Inactive Approval Processes

Action	Approval Process Name	Description
<a href="#">Edit</a>   <a href="#">Del</a>	High_Value_PO_Approval	

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Purchase Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Page Layouts

1 Items, Sorted by Page Layout Name

Q, Quick FindNewPage Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Purchase Order Layout	Om Pote, 9/18/2025, 3:14 AM	Om Pote, 9/24/2025, 7:11 AM

SetupHomeObject Manager

Lightning Bolt

Flow Category

Einstein

Einstein Generative AI

Flow Creation with Einstein

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Paused And Failed Flow

Interviews

Process Builder

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Identity

SETUP

Flows

Flow Trigger ExplorerNew Flow

Flow Definitions

All Flows

50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Temp...	Package State	Packa...	Last M...	Last Modified Date
CMS: Check Whether Any Step is Completed	Evaluation Flow	✓	✓	Managed-Installed			
CMS: Notify Content Author	Screen Flow	✓	✓	Managed-Installed			
CMS: Review Content	Screen Flow	✓	✓	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	✓	✓	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	✓	✓	Managed-Installed			
Create a Case	Screen Flow	✓	✓	Managed-Installed			
Create Draft Flow Approval Process	Screen Flow	✓		Managed-Installed			
Create Finance Task	Autolaunched Flow	✓		Unmanaged		Om Pote	9/24/2025, 7:34 AM
Create Order Summary Flow	Autolaunched Flow		✓	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow		✓	Managed-Installed			
Create Sales Contact Record	Autolaunched Flow	✓		Managed-Installed			
Create Sales Lead Record	Autolaunched Flow	✓		Managed-Installed			
Create Sales Person Account Record	Autolaunched Flow	✓		Managed-Installed			