Phase 4 — Process Automation

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

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

Sample Data

PO Name	Vendor	Amount	Status	Approval Status
PO-001	Vendor A	1,00,000	Draft	Not Submitted
PO-002	Vendor A	6,00,000	Submitted	Pending
PO-003	Vendor B	3,00,000	Submitted	Approved

Vendor	Rating	Compliance
Vendor A	A	Compliant
Vendor B	B	Pending

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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Screenshots

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

Quick Find   New   Page 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	▼

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 Explorer   New 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				▼