

Phase 4 — Process Automation (Admin)

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS

Prepared for: Ijjapureddy Parvathi Devi

Status: Completed

1. Executive Summary

This document records all automations created in Phase 4: **Process Automation (Admin)**.

It includes validation rules, flows, an approval process, and supporting deliverability settings. Each item lists the purpose, where to find it in Salesforce, and how to test it. This document can be submitted as proof of work and a guide for mentor review.

2. Automations Implemented

2.1 Validation Rule

Name: VR PaymentMode Required

Object: Order

Logic: Prevents saving an Order if Payment Mode is blank.

- **Formula:** ISBLANK(Payment_Mode__c)
 - **Error Message:** *Payment Mode must be selected before saving Order*
 - **Error Location:** Top of Page
 - **Verify:** Setup → Object Manager → Order → Validation Rules

Test: Try saving an Order without Payment Mode → error shown.



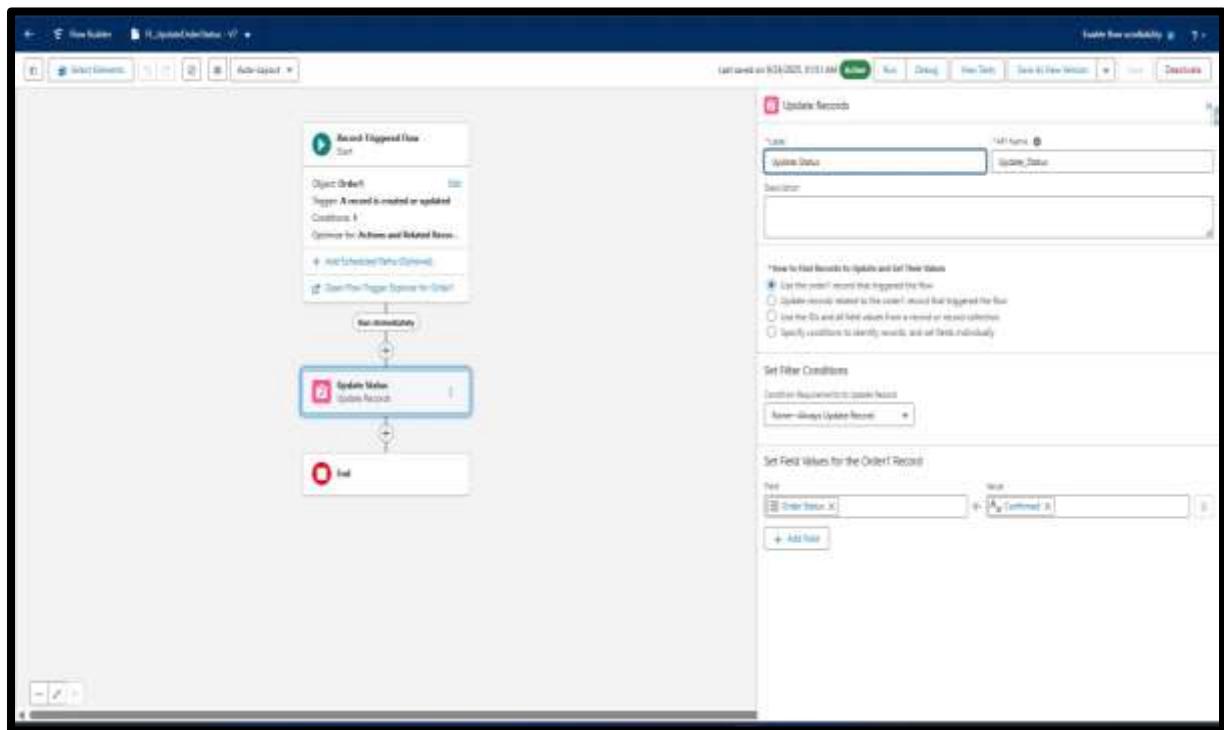
2.2 Flow: FL_UpdateOrderStatus

Type: Record-Triggered Flow (After Create/Update)

Object: Order__c

- Trigger Criteria: Payment_Mode__c = Online
- Action: Update current Order record → Order_Status__c = Confirmed
- Verify: Setup → Flows → FL_UpdateOrderStatus

Test: Create Order with Payment Mode = Online → Status auto-updates to Confirmed.



2.3 Flow: FL_SendOrderShippedEmail

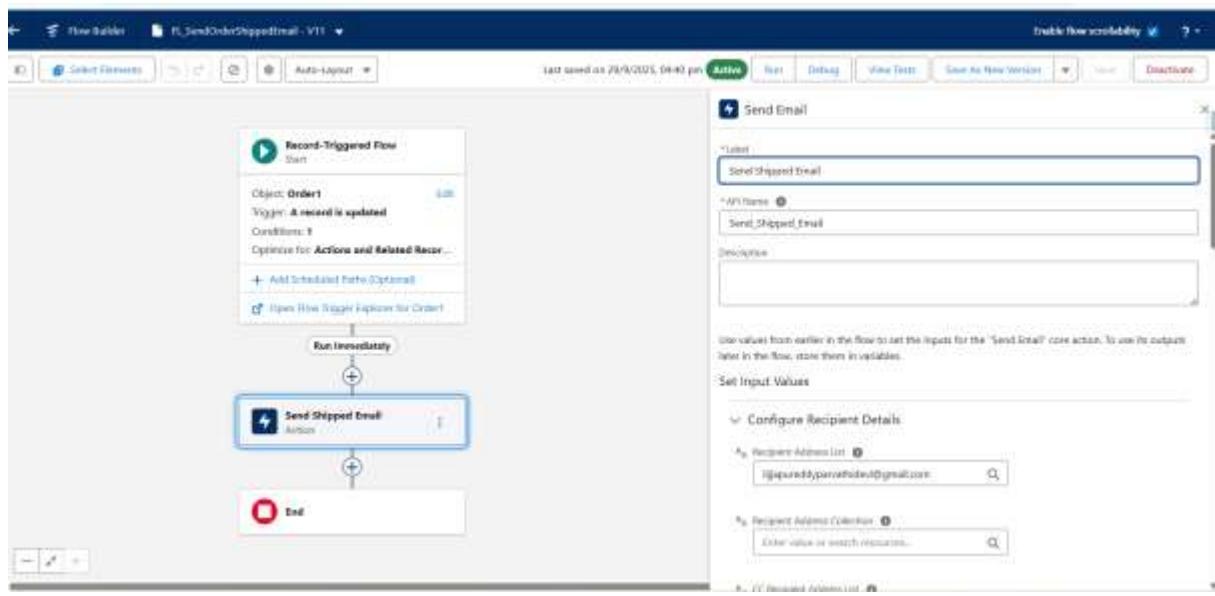
Type: Record-Triggered Flow (After Update)

Object: Order__c

- Trigger Criteria: Order_Status__c = Shipped
- Action: Send Email (demo configured with Additional To Address = your email)
- Deliverability: Setup → Email → Deliverability → All email
- Verify: Setup → Flows → FL_SendOrderShippedEmail

Test: Update an Order's Status to Shipped → email received at configured address.

Note: Direct customer email caused access error. Workaround = fixed Additional To Address for demo. For production, map Customer Email into Order and use that field.



Classic Email Templates

ET_OrderConfirmed

Email Template Detail

From: IJAPUREDDY Parvathi Devi <ijapureddy.parvathi@gmail.com>

To: IJAPUREDDY Parvathi Devi <ijapureddy.parvathi@gmail.com>

Last Used Date: 2019-09-25 4:32 pm

Last Used By: IJAPUREDDY Parvathi Devi

Email Template

Subject: Order Confirmation

Message Body:

Hello [Order__r.Fomer__r.FirstName] your order is confirmed and will be processed soon.

Your Order is Confirmed

IJAPUREDDY Parvathi Devi <ijapureddy.parvathi@gmail.com> Mon, Sep 29, 4:32 PM (1 day ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

Hello , your order is confirmed and will be processed soon.

Reply Forward Delete

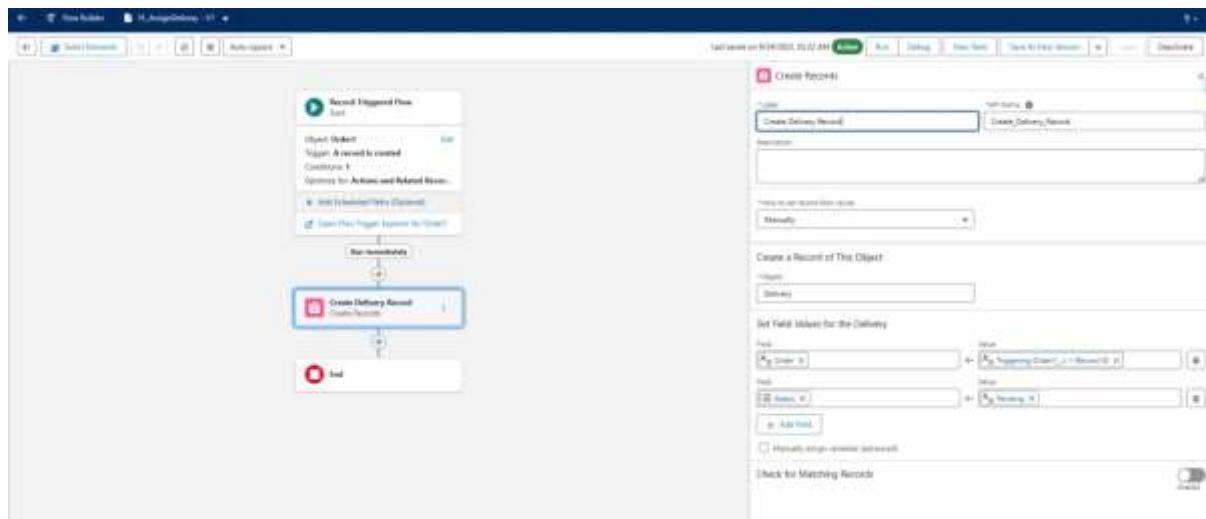
Flow: FL_AssignDelivery

Type: Record-Triggered Flow (After Create)

Object: Order__c

- **Trigger Criteria:** Order_Status__c = Confirmed
- **Action:** Create a Delivery__c record with:
 - Order__c = \$Record.Id
 - Status__c = Pending
- **Verify:** Setup → Flows → FL_AssignDelivery

■ **Test:** Create Confirmed Order → Delivery record auto-created.



2.4 Approval Process: BulkOrderApproval

Object: Order__c

Entry Criteria: Record Type = Bulk Order

- **Approver:** System Administrator (demo)
- **Final Approval:** Set Status = Approved
- **Final Rejection:** Set Status = Rejected
- **Verify:** Setup → Approval Processes → Order → BulkOrderApproval

■ **Test:** Submit Bulk Order for approval → Approver receives request → Approve/Reject → Status updated.

Process Definition Detail

Initial Submission Actions:

- Action Type: Reject
- Description: Lock the record from being edited.

Approval Stage Actions:

- Action: Approve
- User: Manager
- Date: One Day
- Description: Assign Approval Manager
- Assigned Approval Manager: Parvathi Devi
- Action: Reject
- User: Manager
- Date: One Day
- Description: Assign Rejection Manager
- Assigned Rejection Manager: Parvathi Devi

Final Approval Actions:

- Action: Approve
- User: Manager
- Date: One Day
- Description: Lock the record from being edited.
- Locked Record ID: 006000000000000000

Final Rejection Actions:

- Action: Reject
- User: Manager
- Date: One Day
- Description: Unlock the record for editing.
- Unlocked Record ID: 006000000000000000

Approval Needed:

Parvathi Devi (parvathi.devi@salesforce.com) Mon, Sep 29, 4:23 PM (23 hours ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

Hello IJAPUREDDY,

A Bulk Order (1) has been submitted and requires your approval.
Click here to review.

Thanks,
Salesforce System

Reply Forward

3. Deliverability Settings

- **Setting:** Email Deliverability = All email
- **Location:** Setup → Email → Deliverability

Required to allow flows to send test emails.



Deliverability

Deliverability

Configure the settings on this page to improve your organization's email deliverability. Some settings apply to emails sent through Salesforce and emails sent through external accounts that you can connect to Salesforce. Other settings apply to emails sent through Salesforce or Email Relay Only.

Deliverability

Save

View details

Access to Send Email (All Email Services)

Access level: All email

Bounce Management (Email from Salesforce or Email Relay Only)

If Bounce Management is activated and a user sends an email to an invalid email address, the email bounces back to Salesforce and the user is prevented from sending email to that address until it is validated.

Activate bounce management

Return bounced emails to sender

Data Protection and Privacy

Enforce email privacy settings

Email Security Compliance (Emails from Salesforce or Email Relay Only)

Enable these options to improve the deliverability of the email you send to recipients who use email security and authentication mechanisms.

Enable compliance with standard email security mechanisms

Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only)

Configure TLS settings for outbound emails.

TLS Setting: **Preferred**

Resend TLS to these domains:

Email Sending Domain Ownership (Emails from Salesforce or Email Relay Only)

Verify the ownership of email sending domains by DKIM keys