

# Phase 4: Process Automation (Admin)

**Goal:** The goal of Phase 4 is to implement automation and business processes in Salesforce to reduce manual effort and enforce business rules. The automations cover validation, workflows, approvals, and flows that support the operations of Farmers, Buyers, and Logistics in the GreenHarvest ecosystem.


## Validation Rules

### Order Price Validation

- Rule: Price\_\_c must be greater than 0.
- Error: "Order Price must be greater than 0."

### Requirement Quantity Validation

- Rule: Quantity\_\_c must be greater than 0.
- Error: "Quantity must be greater than 0."



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Object Manager

SETUP

Object Manager

Order Validation Rule

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Validation Rule Detail


Edit

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Rule Name	Order_Price_Check	Active	✓
Error Condition Formula	Price__c <= 0		
Error Message	Order Price must be greater than 0.	Error Location	Price
Description			
Created By	Hima bindu k. 9/26/2025, 1:14 AM	Modified By	Hima bindu k. 9/26/2025, 1:14 AM

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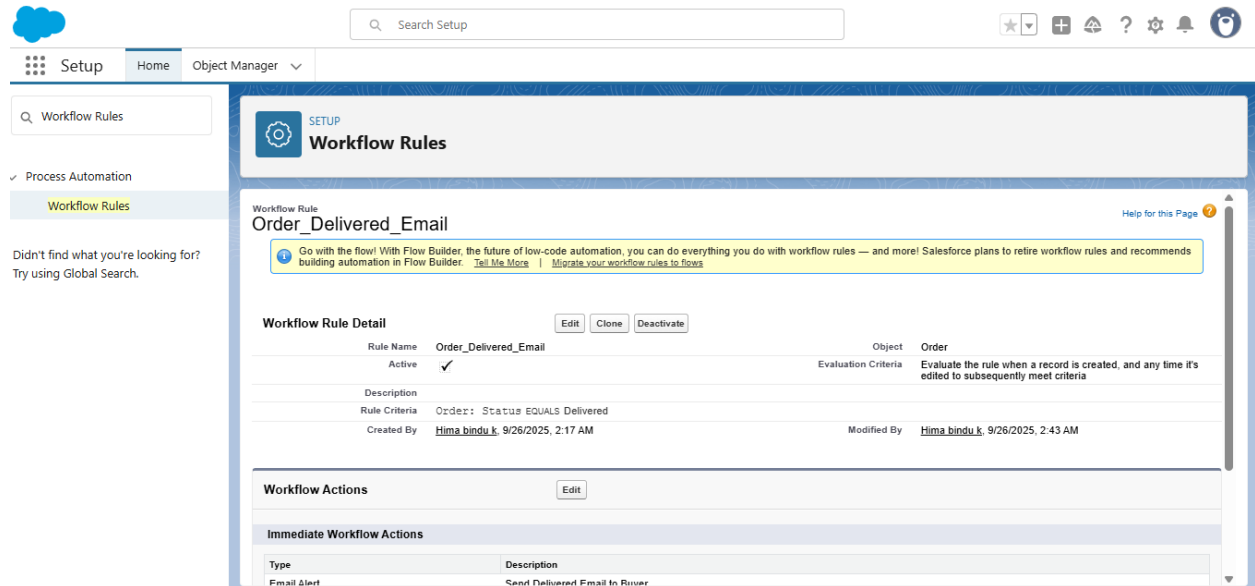
Rule Name	Requirement_Quantity_Check	Active	✓
Error Condition Formula	Quantity__c <= 0		
Error Message	Quantity must be greater than 0	Error Location	Quantity
Description			
Created By	Hima bindu k. 9/26/2025, 1:20 AM	Modified By	Hima bindu k. 9/26/2025, 1:20 AM

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## Workflow Rule & Email Alert

- Workflow Rule: On Order\_\_c → when Status = Delivered.
- Action: Send email to Buyer with “Order Delivered Notification.”
- Email Template: Includes Order details (Crop, Quantity, Price).



## Process Builder (Legacy)

- Process Builder is a **legacy automation tool** in Salesforce. It has now been replaced by Flow Builder, but it is included here for learning purposes.
- **Example Implemented:**
  - When an **Order** is submitted with Status = Delivered, Process Builder automatically updates the field **Delivery\_Date\_\_c** to TODAY.

## Approval Process

- Approval Processes in Salesforce are used to enforce **business governance** by routing records for review and approval.
- In GreenHarvest, an **Approval Process** was created for **high-value Orders**.

## Implementation Details:

- **Process Name:** High Value Order Approval
- **Criteria:** Order Price\_\_c > 50,000
- **Assigned Approver:** Role = Sales Manager
- **Final Approval Action:** Update Status\_\_c → Approved
- **Final Rejection Action:** Update Status\_\_c → Rejected

**Approval Processes**

Order: High\_Value\_Order\_Approval

Process Definition Detail

Process Name	High_Value_Order_Approval	Active	✓
Unique Name	High_Value_Order_Approval	Next Automated Approver	Determined By
Description			
Entry Criteria	Order: Price GREATER THAN "INR 50,000"		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Order Owner		
Initial Submitters	Order Owner		
Created By	Hima bindu k.	Modified By	Hima bindu k.
	9/26/2025, 3:07 AM		9/26/2025, 3:08 AM

Initial Submission Actions

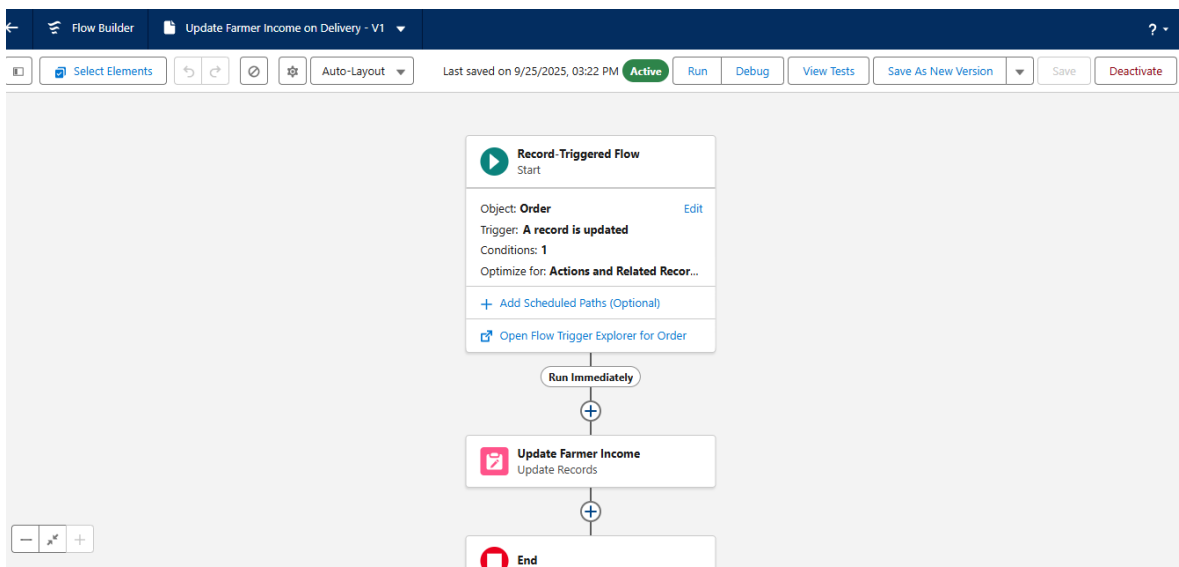
Action	Type	Description
Record Lock		Lock the record from being edited

## Flow Builder

Flows are the primary automation tool in Salesforce (replacing Workflow and Process Builder). For GreenHarvest, multiple Record-Triggered Flows were implemented:

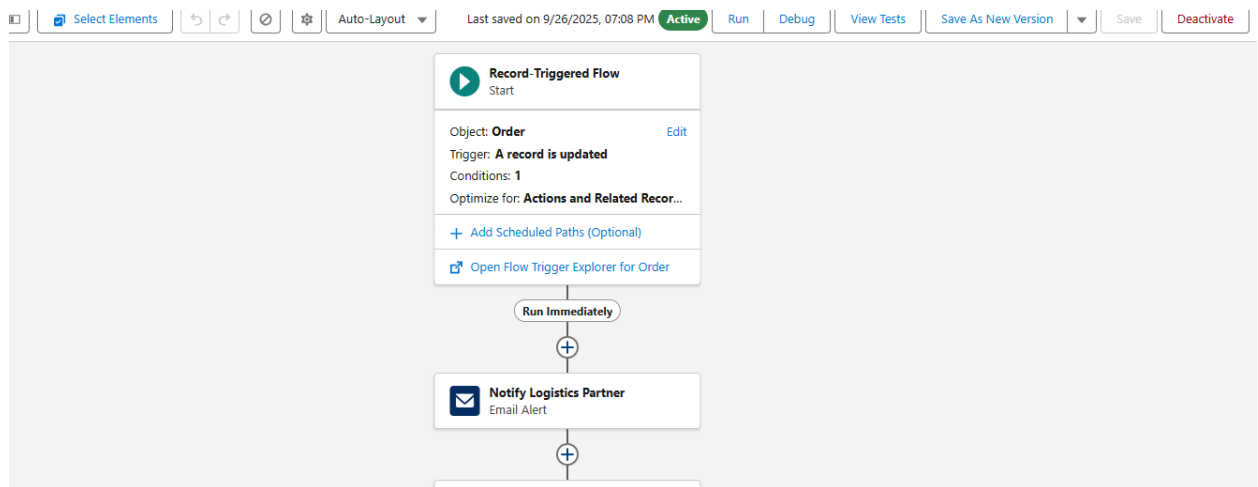
### Update Farmer Income

- **Object:** Order\_\_c
- **Trigger:** When a new Order is created
- **Action:** Update related Farmer.Total\_Income\_\_c = Total\_Income\_\_c + Order.Price\_\_c



## Notify Logistics Partner

- **Object:** Order\_\_c
- **Trigger:** When Status\_\_c = In Transit
- **Action:** Send Email Alert to Logistics Partner



## Email Alerts

Automated email notifications keep users informed.

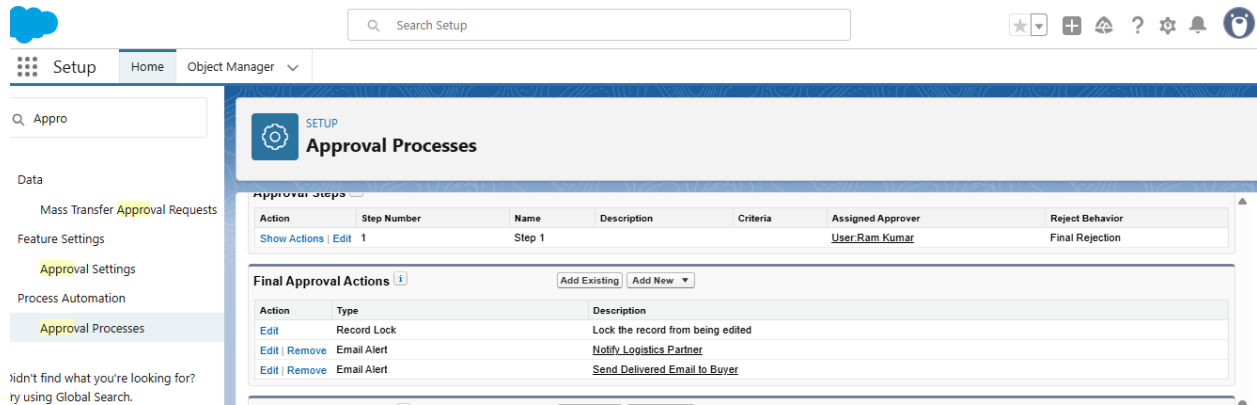
o Example: After approval, send email to Student: “Your application has been approved. Next steps will follow soon.

The screenshot shows the Salesforce Setup page for Email Alerts. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'Email Alerts' and shows the configuration for the 'Notify Logistics Partner' email alert. The configuration includes fields for Description, Unique Name, From Email Address, Recipients, Additional Emails, Email Template, Object, Created By, and Modified By. Below the configuration, there are sections for 'Rules Using This Email Alert' and 'Approval Processes Using This Email Alert', both indicating that the alert is currently not used by any rules or approval processes.

## Field Updates

In Approval Process → if Order is Approved → Status\_\_c is updated to Approved.

**Example:** If Order is Rejected → Status\_\_c is updated to Rejected.



## Custom Notifications

Custom Notifications in Salesforce deliver **real-time in-app alerts** to users, ensuring they stay updated without relying only on emails.

- When a **high-value Order (>50,000)** is approved by the Sales Manager, send a **real-time notification** to the **Logistics Partner** so they can immediately begin arranging transport.

### Implementation Steps:

1. Setup → Notification Builder → Notification Types → New.
  - **Label:** High Value Order Approved
  - **Channel:** Desktop & Mobile
2. Add this notification to the Approval Process → **Final Approval Action** → Send Custom Notification.
3. Recipients = Logistics Partner Role.