Phase 4: Process Automation (Admin)

1. Introduction

Process automation in Salesforce reduces manual effort, improves accuracy, and ensures timely actions. In the Leave Management System, automation ensures:

- Employees' leave requests are validated correctly.

- Short-duration leaves are automatically approved.

- Managers are notified about pending leave requests.

This phase leverages Validation Rules, Flows, and Email Alerts to automate the leave management process.
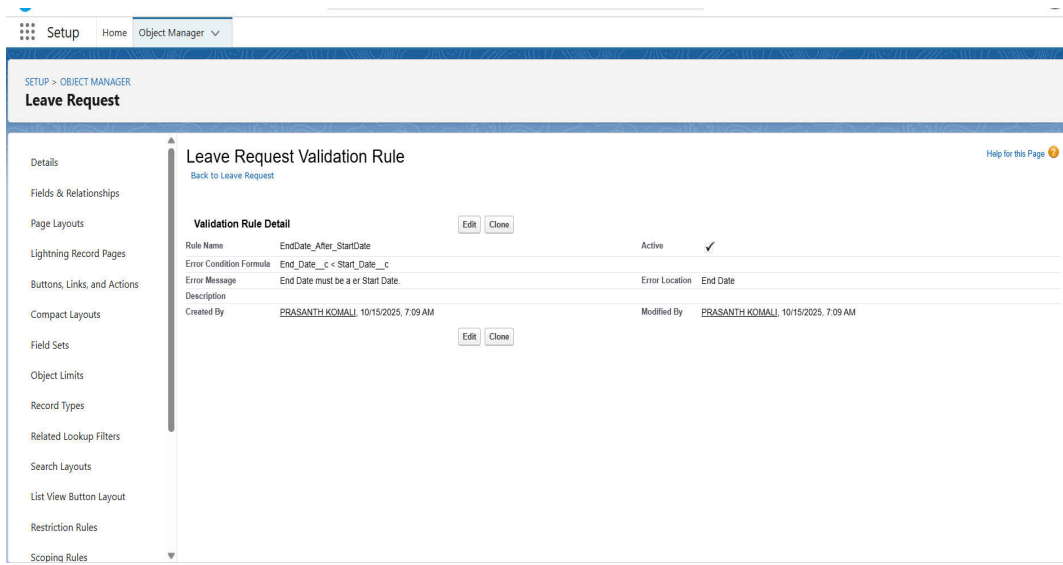
2. Validation Rule: End Date After Start Date

Purpose:

To prevent employees from entering an invalid leave period (End Date earlier than Start Date).

Steps Implemented:

1. Go to Setup → Object Manager → Leave_Request__c → Validation Rules → New.

2. Enter:

   - Rule Name: EndDate_After_StartDate

   - Error Condition Formula:

     End_Date__c < Start_Date__c

   - **Error Message:** "End Date must be after Start Date."
   - **Error Location:** Field = End Date

SETUP > OBJECT MANAGER
Leave Request

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Validation Rule Detail   Edit Clone

Rule Name	EndDate_After_StartDate		Active	✓
Error Condition Formula	End_Date__c < Start_Date__c			
Error Message	End Date must be a er Start Date.		Error Location	End Date
Description				
Created By	PRASANTH KOMALI, 10/15/2025, 7:09 AM		Modified By	PRASANTH KOMALI, 10/15/2025, 7:09 AM

Edit Clone

3. Record-Triggered Flow: Auto-Approve Short Leaves

Purpose:

Automatically approve leave requests that are **2 days or less**.

Steps Implemented:

1. Go to **Setup → Flows → New Flow → Record-Triggered Flow**.

2. Select **Object:** Leave_Request__c.

3. **Trigger:** When record is **created or updated**.

4. **Condition:**

   o Formula to calculate number of days:

     (End_Date__c - Start_Date__c + 1) <= 2

5. **Action:**

- **Update Record → Field:** Status = Approved

6. Save the Flow → Activate.
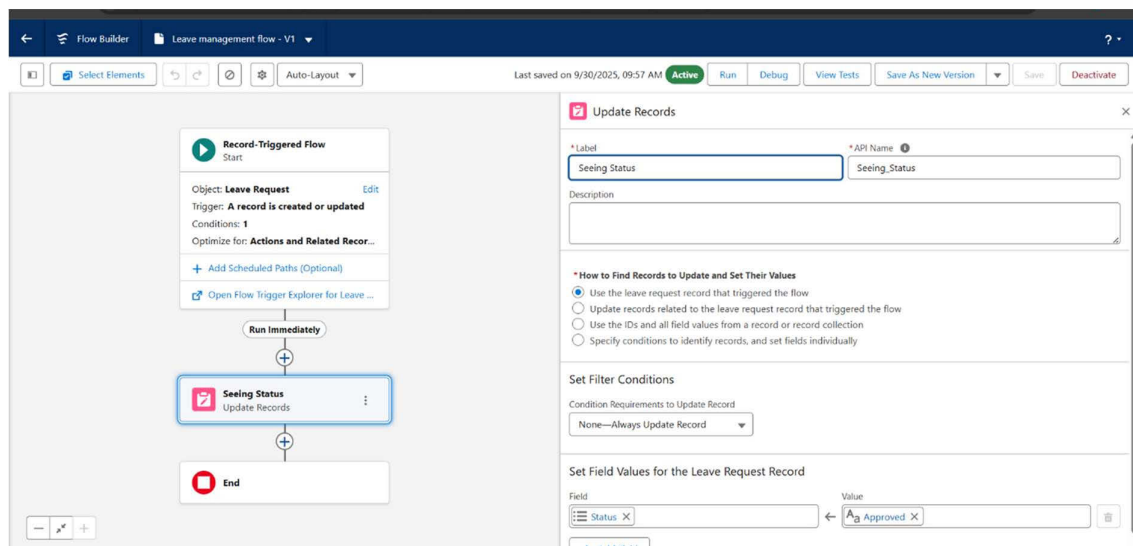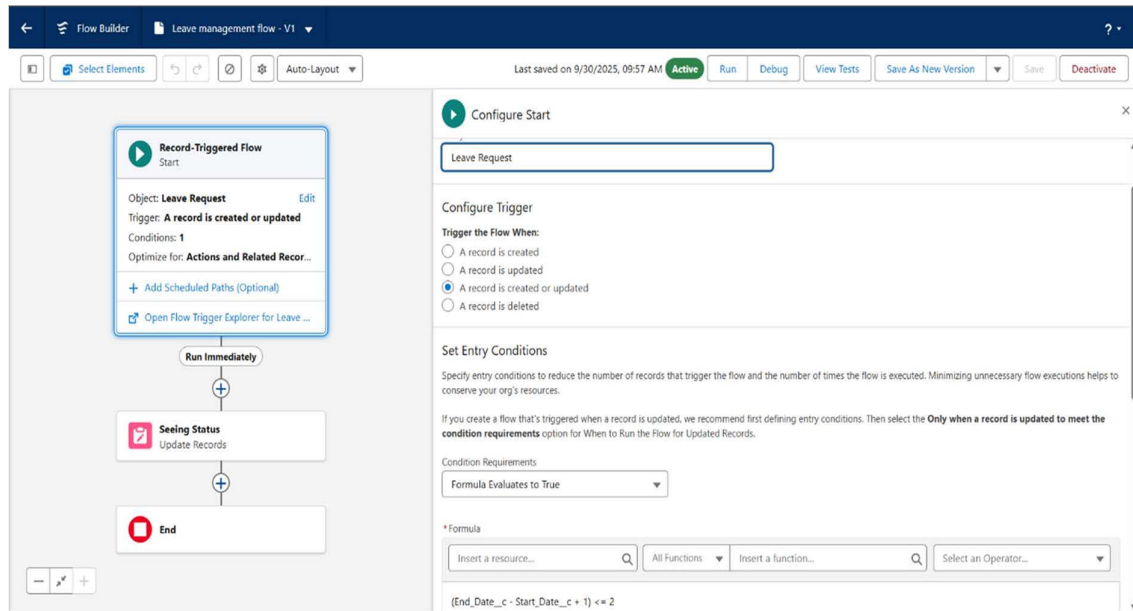
4. Email Alert

Purpose:

Notify the manager whenever a new leave request is submitted (Status = New).

Steps Implemented:

1. Go to **Setup → Workflow Rules → New Email Alert** (or Flow email action).

2. Select **Object:** Leave_Request__c.

3. **Recipient:** Manager (lookup from Role or User).

4. **Email Template:** Create a template with:

 6. Outcome of Phase 4

- **Validation Rule** ensures correct leave dates.

- **Record-Triggered Flow** automates approvals for short leaves.

- **Email Alerts** notify managers of pending leave requests.

- Employees can submit leaves confidently, knowing automation handles simple approvals and checks.

7. Conclusion

Phase 4 automation reduces manual work, ensures accurate leave processing, and makes the system professional and user-friendly.