

# ERM Hybrid Workforce Project – Phase 4

## Phase 4: Process Automation (Admin)

### 1. Validation Rules

#### Analytics Metric

- **Ensure\_all\_critical\_fields\_are\_filled** – Validates all required fields before saving.
- **Source\_Must\_Be\_Selected** – Ensures a data source is provided.
- **Status\_Cannot\_Be\_Blank** – Prevents records without a status.
- **Metric\_Name\_Cannot\_Be\_Blank** – Ensures metric is properly named.
- **Value\_Cannot\_Be\_Blank\_or\_Negative** – Validates metric value is filled and greater than zero.

SETUP > OBJECT MANAGER				
Hybrid Schedule				
Details	Validation Rules			
Fields & Relationships	5 Items, Sorted by Rule Name			
Page Layouts				
Lightning Record Pages				
Buttons, Links, and Actions				
Compact Layouts				
Field Sets				
Object Limits				
Record Types				
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE
	Prevent_Duplicate_Schedules_for_Same_Dat	Schedule Date	"Schedule already exists for this employee on this date."	✓
	Prevent_Scheduling_in_the_Past	Schedule Date	"Schedule date cannot be in the past."	✓
	Restrict_Remote_Office_Field_Selection	Work Mode	"Please select a work type: Remote or Office."	✓
	Restrict_Scheduling_on_Weekends	Schedule Date	"Office schedule cannot be on weekends."	✓
	Start_Time_End_Time_Status	Start Time	"End Time must be after Start Time, and Status must be either Scheduled or Confirmed."	✓

#### Hybrid Schedule

- **Prevent\_Duplicate\_Schedules\_for\_Same\_Date** – Stops employees from having multiple schedules on the same date.
- **Prevent\_Scheduling\_in\_the\_Past** – Disallows creating schedules in past dates.
- **Restrict\_Remote\_Office\_Field\_Selection** – Ensures valid selection between remote/office work.
- **Restrict\_Scheduling\_on\_Weekends** – Prohibits schedules on weekends.
- **Start\_Time\_End\_Time\_Status** – Validates logical order of start and end times.

SETUP > OBJECT MANAGER					
Pulse Survey					
Details	<b>Validation Rules</b> 5 Items, Sorted by Rule Name <span>New</span>				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
Compact Layouts					
Field Sets					
Object Limits					
Record Types					
	<b>RULE NAME</b>	<b>ERROR LOCATION</b>	<b>ERROR MESSAGE</b>	<b>ACTIVE</b>	<b>MODIFIED BY</b>
	Employee_Must_Be_Selected	Employee	"Please select the employee for this survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:52 AM
	Feedback_Text_Cannot_Be_Blank	Feedback Text	"Feedback text is required when submitting the survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:53 AM
	HR_Reviewer_Must_Assigned_Before_Review	HR Reviewer	"HR Reviewer must be assigned before marking the survey as Reviewed."		Venkata Balaji Sai R, 9/23/2025, 7:54 AM
	Prevent_Empty_Survey_Submission	Survey Name	All required fields must be filled to submit the survey."	✓	Venkata Balaji Sai R, 9/23/2025, 7:57 AM
	Sentiment_Score_Cannot_Be_Blank	Sentiment Score	"Sentiment Score must be calculated before marking the survey as Reviewed."	✓	Venkata Balaji Sai R, 9/23/2025, 7:55 AM

## Pulse Survey

- **Employee\_Must\_Be\_Selected** – Requires employee to be linked.
- **Feedback\_Text\_Cannot\_Be\_Blank** – Ensures feedback text is mandatory.
- **HR\_Reviewer\_Must\_Assigned\_Before\_Review** – Validates HR reviewer assignment before approval.
- **Prevent\_Empty\_Survey\_Submission** – Prevents submitting incomplete surveys.
- **Sentiment\_Score\_Cannot\_Be\_Blank** – Requires sentiment analysis score.

## Employee Status

- **Combined\_Rule** – Consolidates validation logic across employee status fields.
- **Employee\_Must\_Be\_Selected** – Requires employee reference.
- **Related\_Schedule\_Must\_Be\_Linked** – Ensures schedule is tied to status record.
- **Status\_Must\_Be\_Selected** – Prevents blank status values.
- **Team\_Manager\_Must\_Be\_Assigned\_for\_Office** – Requires manager assignment for in-office work.
- **Work\_Mode\_Must\_Be\_Selected** – Validates remote/hybrid/office work mode.

SETUP > OBJECT MANAGER					
Employee Status					
Details	<b>Validation Rules</b> 6 Items, Sorted by Rule Name <span>New</span>				
Fields & Relationships					
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
Compact Layouts					
Field Sets					
Object Limits					
Record Types					
Related Lookup Filters					
	<b>RULE NAME</b>	<b>ERROR LOCATION</b>	<b>ERROR MESSAGE</b>	<b>ACTIVE</b>	<b>MODIFIED BY</b>
	Combined_Rule	Top of Page	"End Time must be after Start Time, and Status and Work Mode must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:25 AM
	Employee_Must_Be_Selected	Employee	"Employee must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:21 AM
	Related_Schedule_Must_Be_Linked	Related Schedule	"Related Schedule must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:22 AM
	Status_Must_Be_Selected	Status	"Status must be selected."	✓	Venkata Balaji Sai R, 9/23/2025, 8:23 AM
	Team_Manager_Must_Be_Assigned_for_Office	Team Manager	"Team Manager must be assigned for Office or Hybrid work mode."		Venkata Balaji Sai R, 9/23/2025, 8:24 AM
	Work_Mode_Must_Be_Selected	Work Mode	"Work Mode must be selected (Office, Remote, Hybrid)."	✓	Venkata Balaji Sai R, 9/23/2025, 8:23 AM

## 2. Workflow Rules

- **Analytics Metric Verified Notification** – Alerts team when a metric is verified.
- **Employee Schedule Approval Notification** – Notifies employee after approval.

- **Employee Status Missing Schedule Alert** – Triggers when status record lacks a related schedule.
- **Pulse Survey Submission Alert** – Alerts manager when a survey is submitted.
- **Well-Being Critical Alert Notification** – Notifies manager/HR when a critical well-being alert is raised.

**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="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Analytics Metric Verified Notification</a>		Analytics Metric	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Employee Schedule Approval Notification</a>		Employee Status	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Employee Status Missing Schedule Alert</a>		Employee Status	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Pulse Survey Submission Alert</a>		Pulse Survey	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Well-Being Critical Alert Notification</a>		Well-being Alert	✓

## 3. Email Alerts

- **Analytics Metric Verified Notification** – Informs leadership/HR when metrics are verified.
- **Critical Well-Being Alert Notification** – Sends urgent email for critical alerts.
- **Employee Schedule Approval Notification** – Notifies employees of approved schedules.
- **Missing Schedule Alert** – Informs manager about missing schedules.
- **Pulse Survey Submission Alert** – Notifies manager when survey submitted.

### All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: **All Email Alerts** [Create New View](#)

Action	Description	Email Template Name	Object	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Analytics Metric Verified Notification</a>	<a href="#">Analytics Metric Verified Notification</a>	Analytics Metric	9/23/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Critical Well-Being Alert Notification</a>	<a href="#">Well-Being Critical Alert Notification</a>	Well-being Alert	9/23/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Employee Schedule Approval Notification</a>	<a href="#">Employee Status Missing Schedule Alert</a>	Employee Status	9/23/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Missing Schedule Alert</a>	<a href="#">Employee Status Missing Schedule Alert</a>	Employee Status	9/23/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Pulse Survey Submission Alert</a>	<a href="#">Pulse Survey Submission Alert</a>	Pulse Survey	9/23/2025

## 4. Field Updates

- **Analytics Metric Verified** – Updates metric record status; raises priority to high.
- **Employee Schedule Notification** – Updates schedule record after approval.

- **Employee Status Missing Schedule Alert** – Updates follow-up status to pending.
- **Pulse Survey Submission Alert** – Updates review status to pending.
- **Well-Being Critical Alert** – Updates follow-up field to pending for critical alerts.

SETUP Field Updates					
All Workflow Field Updates					
Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.					
View: [All Workflow Field Updates] Edit Create New View					
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All					
Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit   Del	Analytics Metric Verified	Analytics Metric: Status	Value	Active	9/23/2025
Edit   Del	Changes the case priority to high	Case: Priority	Value	High	9/17/2025
Edit   Del	Employee Schedule	Employee Status: Status	Value	On Break	9/23/2025
Edit   Del	Employee Schedule Notification	Employee Status: Status	Value	Working	9/23/2025
Edit   Del	Employee Status Missing Schedule Alert	Employee Status: Status	Value	On Break	9/23/2025
Edit   Del	Pulse Survey Submission Alert	Pulse Survey: Survey Status	Value	Submitted	9/23/2025
Edit   Del	Well-Being Critical Alert	Well-being Alert: Alert Type	Value	Workload	9/23/2025
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All					

## 5. Tasks


- **Acknowledge Approved Schedule** – Assigned to employee upon approval.
- **Follow up Missing Employee Schedule** – Assigned to manager for correction.
- **Follow-up on Critical Well-Being Alert** – Assigned to manager/HR for immediate action.
- **Review Submitted Pulse Survey** – Assigned to manager for review.
- **Review Verified Metric for Dashboard** – Assigned to analytics/HR team for validation.

SETUP Tasks							
All Tasks							
Tasks are the templates that workflow rules use when automatically assigning tasks to users.							
View: [All Tasks] Create New View							
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All							
Action	Subject	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
Edit   Del	Acknowledge Approved Schedule	Rule Trigger Date + 1 days	High	Not Started	User : Employee ERM	<input type="checkbox"/>	Employee Status
Edit   Del	Follow up Missing Employee Schedule	Current User: Last Login + 1 days	High	In Progress	User : Manager ERM	<input type="checkbox"/>	Employee Status
Edit   Del	Follow-up on Critical Well-Being Alert	Well-being Alert: Created Date	High	Not Started	User : Manager ERM	<input type="checkbox"/>	Well-being Alert
Edit   Del	Review Submitted Pulse Survey	Pulse Survey: Created Date	Normal	Not Started	User : Manager ERM	<input type="checkbox"/>	Pulse Survey
Edit   Del	Review Verified Metric for Dashboard	Rule Trigger Date	Normal	Not Started	User : HR ERM	<input type="checkbox"/>	Analytics Metric
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All							

## 6. Custom Notifications

- **Analytics Metric Verified Notification** – Instant notification for leadership/HR.

- **Employee Schedule Approval Notification** – Real-time alert to employee.
- **Employee Status Missing Schedule Alert** – Alert to manager for correction.
- **Pulse Survey Submission Alert** – Notification to manager for survey review.
- **Well-Being Critical Alert Notification** – High-priority notification for well-being issues.


**Custom Notifications**

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

**Custom Notification Types** New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
Analytics Metric Verified Notification	Analytics_Metric_Verified_Notification		✓	✓	▼
Employee Schedule Approval Notification	Employee_Schedule_Approval_Notification		✓	✓	▼
Employee Status Missing Schedule Alert	Employee_Status_Missing_Schedule_Alert		✓	✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼
Pulse Survey Submission Alert	Pulse_Survey_Submission_Alert		✓	✓	▼
Well-Being Critical Alert Notification	WellBeing_Critical_Alert_Notification		✓	✓	▼

## Phase 4 Status: Completed Successfully

### Next Steps:

- Proceed to **Phase 5: Apex Programming (Developer)**
- Begin testing Classes & Objects, Apex Triggers, Collections, SSQL & SOSL... etc

## Phase 4 Completion Document.