

Phase 4: Problem Understanding & Industry Analysis — ERM for Hybrid Workforce

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					
<div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div>	<div>Validation Rules</div> <div>3 Items, Sorted by Rule Name</div> <div>New</div>				
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	Prevent_Duplicate_Schedules_for_Same_Dat	Schedule Date	"Schedule already exists for this employee on this date."	✓	Venkata Balaji Sai R, 9/23/2025, 7:27 AM
	Prevent_Scheduling_in_the_Past	Schedule Date	"Schedule date cannot be in the past."	✓	Venkata Balaji Sai R, 9/23/2025, 7:19 AM
	Restrict_Remote_Office_Field_Selection	Work Mode	"Please select a work type: Remote or Office."	✓	Venkata Balaji Sai R, 9/23/2025, 7:39 AM
	Restrict_Scheduling_on_Weekends	Schedule Date	"Office schedule cannot be on weekends."	✓	Venkata Balaji Sai R, 9/23/2025, 7:33 AM
	Start_Time_End_Time_Status	Start Time	"End Time must be after Start Time, and Status must be either Scheduled or Confirmed."	✓	Venkata Balaji Sai R, 9/23/2025, 7:46 AM

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					
<div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div>	<div>Validation Rules</div> <div>3 Items, Sorted by Rule Name</div> <div>New</div>				
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	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.

Employee Status					
Validation Rules					
6 Items, Sorted by Rule Name					
New					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
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.

SETUP

Workflow Rules

All Workflow Rules

Help for this Page

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 Flow](#)

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

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	Rule Name	Description	Object	Active
Edit Del Deactivate	Analytics Metric Verified Notification		Analytics Metric	✓
Edit Del Deactivate	Employee Schedule Approval Notification		Employee Status	✓
Edit Del Deactivate	Employee Status Missing Schedule Alert		Employee Status	✓
Edit Del Deactivate	Pulse Survey Submission Alert		Pulse Survey	✓
Edit Del Deactivate	Well-Being Critical Alert Notification		Well-being Alert	✓

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

Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

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

Help for this Page

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

View: All Email Alerts 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	Description	Email Template Name	Object	Last Modified Date
Edit Del	Analytics Metric Verified Notification	Analytics Metric Verified Notification	Analytics Metric	9/23/2025
Edit Del	Critical Well-Being Alert Notification	Well-Being Critical Alert Notification	Well-being Alert	9/23/2025
Edit Del	Employee Schedule Approval Notification	Employee Status Missing Schedule Alert	Employee Status	9/23/2025
Edit Del	Missing Schedule Alert	Employee Status Missing Schedule Alert	Employee Status	9/23/2025
Edit Del	Pulse Survey Submission Alert	Pulse Survey Submission Alert	Pulse Survey	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

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.

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](#)

New Field Update					
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

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.

All Tasks

Tasks are the templates that workflow rules use when automatically assigning tasks to users.


View: [All Tasks](#) [Create New View](#)

New Task							
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

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