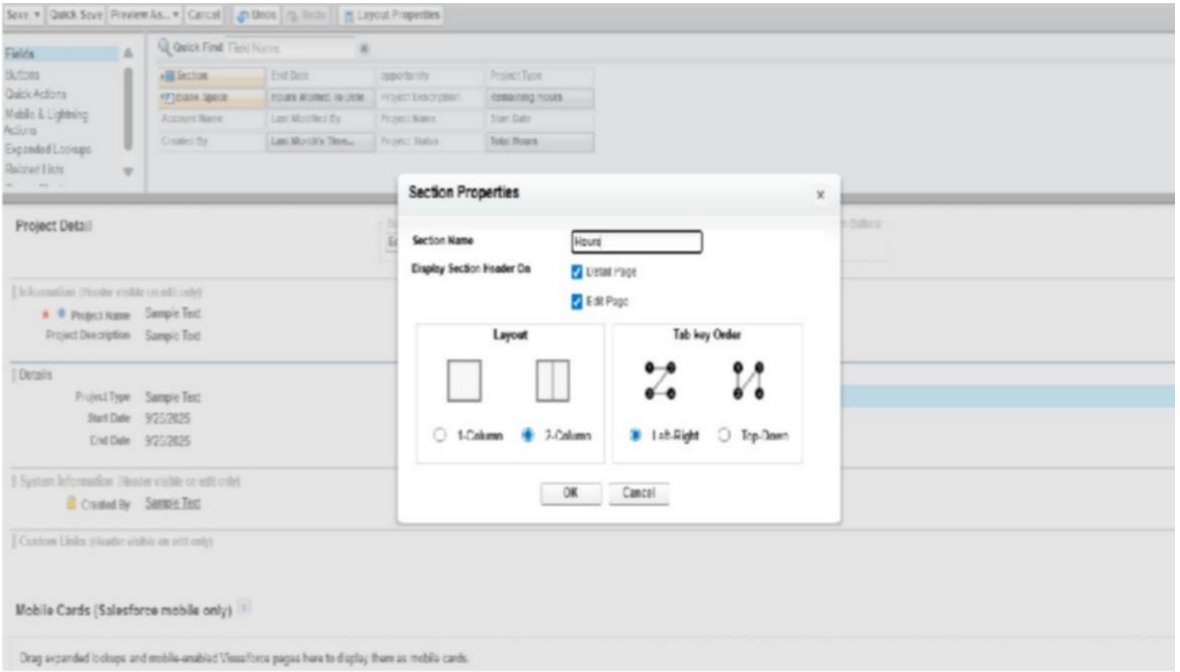
# PROJECT MANAGEMENT APP

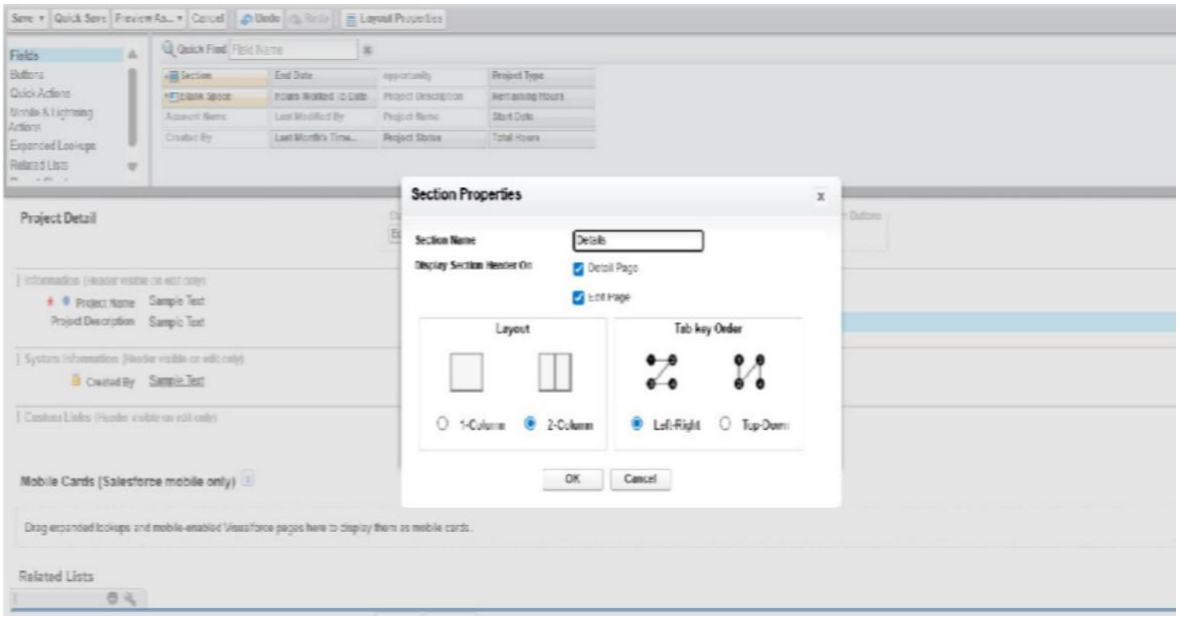
YELURI SAHITHI NAVYA

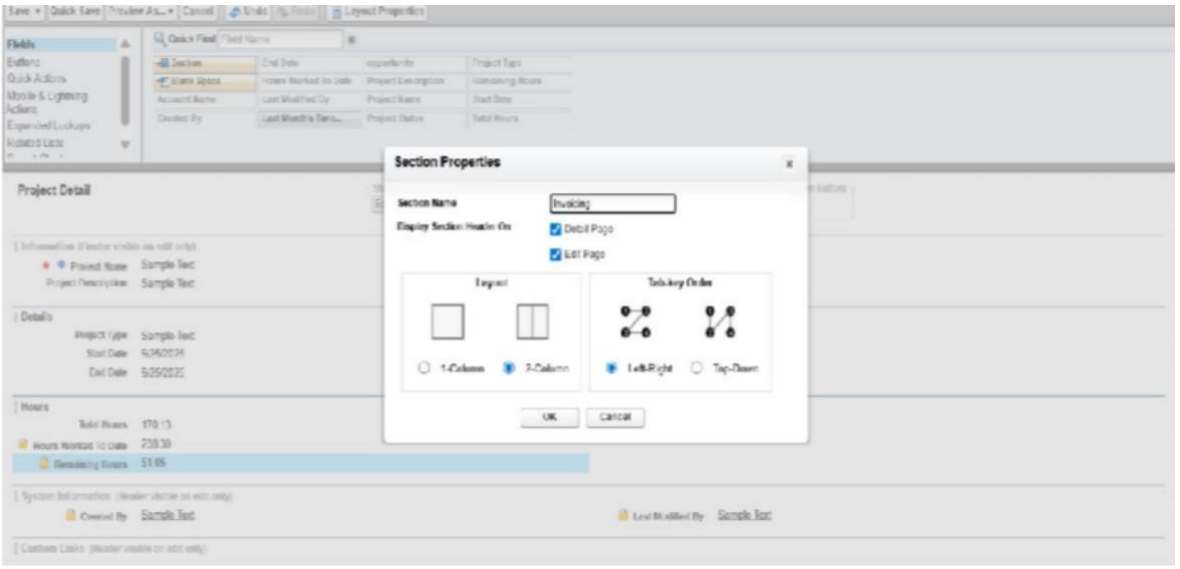
## Phase 4: Process Automation (Admin)

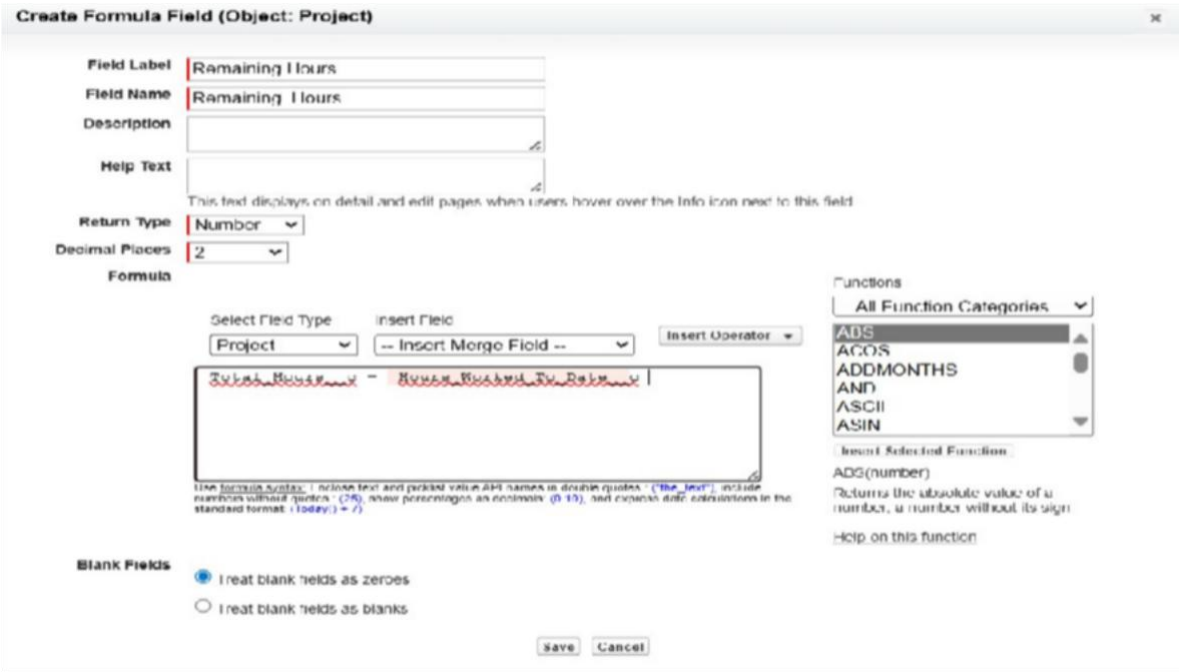
Goal: Automate recurring processes and enforce validations.

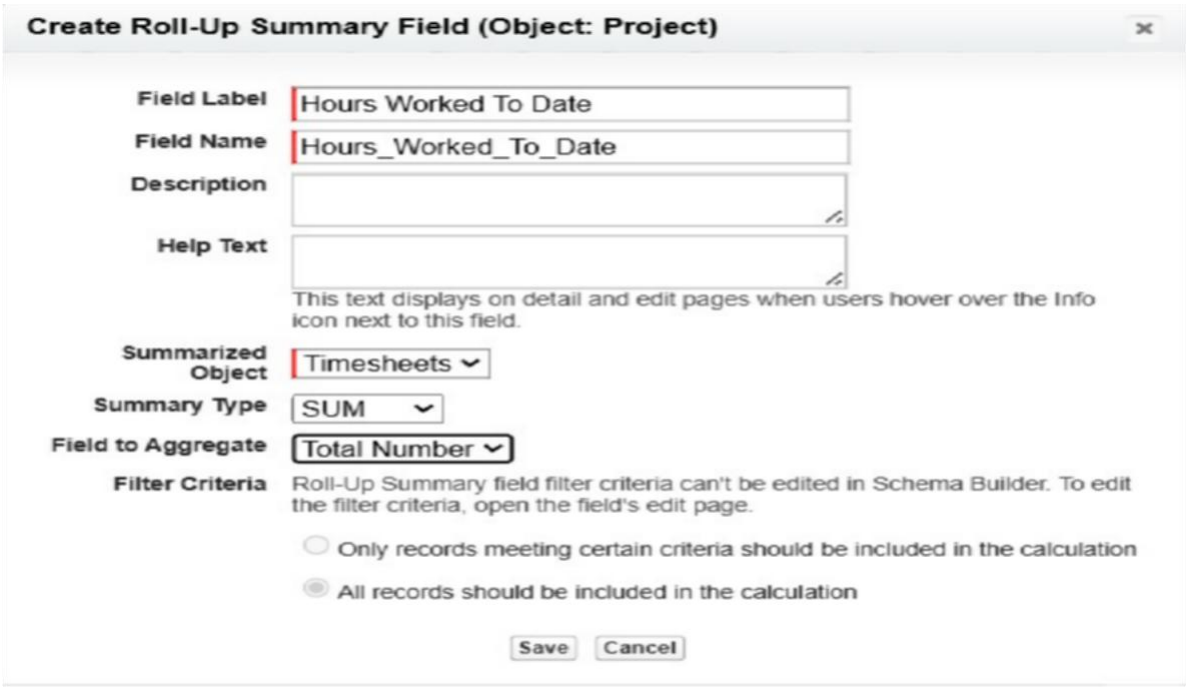
- Create validation rules (e.g., Task end date must be after start date).
- Use Flow Builder for auto-assigning tasks to resources.
- Implement record-triggered flows for project updates.
- Define approval process for high-priority project tasks.
- Set up email notifications for task assignments and completions.
- Configure custom notifications for in-app alerts.
- Automate reminders for deadlines through scheduled flows.
- Assign follow-up tasks automatically after project phase completion.
- Use conditional logic to update project statuses dynamically.




Section Properties
Section Name
Details
Display Section Header On
Detail Page
Edit Page
Layout
Tab key Order
1-Column
2-Column
Left-Right
Top-Down
OK
Cancel
Project Detail
Mobile Cards (Salesforce mobile only)
Related Lists


Section Properties
Project Detail


Create Formula Field (Object: Project)
Field Label
Ramaining Hours
Field Name
Ramaining_Hours
Description
Help Text
Return Type
Number
Decimal Places
2
Formula
Select Field Type
Project
Insert Field
-- Insert Merge Field --
Insert Operator
Functions
All Function Categories
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Blank Fields
Treat blank fields as zeroes
Treat blank fields as blanks
Save
Cancel


Create Roll-Up Summary Field (Object: Project)
Field Label
Hours Worked To Date
Field Name
Hours_Worked_To_Date
Description
Help Text
This text displays on detail and edit pages when users hover over the Info icon next to this field.
Summarized Object
Timesheets
Summary Type
SUM
Field to Aggregate
Total Number
Filter Criteria
Roll-Up Summary field filter criteria can't be edited in Schema Builder. To edit the filter criteria, open the field's edit page.
Only records meeting certain criteria should be included in the calculation
All records should be included in the calculation
Save
Cancel