

# LegalAid Connect – Phase 4: Process Automation (Admin) Report

**Project Title:** LegalAid Connect – Legal Case Management CRM

**Phase:** 4 – Process Automation (Admin)

**Date:** 26 September 2025

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## 1. Introduction

- Phase 4 focused on automating business processes to reduce manual effort, enforce rules, and ensure data accuracy.
- Automation tools used: Validation Rules, Workflow Rules, Process Builder, Approval Processes, Flows, Escalation Rules, and Scheduled Flows.

## 2. Validation Rules

Ensure data integrity and prevent invalid entries across the system:

- Case Dates:** Prevent End\_Date\_\_c from being before Start\_Date\_\_c in Legal\_Case\_\_c.
- Mandatory Client Name:** Prevent blank Client\_\_c field in Legal\_Case\_\_c.
- Case Priority:** Ensure Priority\_\_c is set to High, Medium, or Low.
- Fee Amount:** Ensure Fee\_\_c is greater than zero in Billing\_\_c.
- Lawyer Assignment:** Prevent saving a case without an assigned lawyer.

Validation Rules					New
2 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
<a href="#">Case_Open_Date_Check</a>	Top of Page	Case open date cannot be in the future.	✓	GOWNI SRJITHA, 9/25/2025, 11:39 PM	▼
<a href="#">Lawyer_Assignment_Mandatory</a>	Top of Page	A lawyer must be assigned to the case.	✓	GOWNI SRJITHA, 9/25/2025, 11:57 PM	▼

## 3. Workflow Rule

- Object:** Legal\_Case\_\_c
- Rule Name:** Notify\_Client\_On\_Case\_Update
- Purpose:** Automatically notify clients when their case status is updated.
- Evaluation Criteria:** Created and every time it's edited to meet criteria
- Rule Criteria:** All records or specific status changes (e.g., "Filed," "Hearing Scheduled")
- Action:** Email Alert to Related\_Client\_\_c
  - Email Template Example:
  - Hello {!\$Record.Related\_Client\_\_c.Name},
  - Your case {!\$Record.Case\_Name\_\_c} has been updated.
  - Current Status: {!\$Record.Status\_\_c}
  - Please review any instructions or documents shared by your lawyer.

## 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 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.

### Quick Tips

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

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](#)

New Rule				
Action	Rule Name +	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	LegalAid_Case__c		Legal Case	<input type="checkbox"/>

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. Process Builder

**Object:** Legal\_Case\_\_c

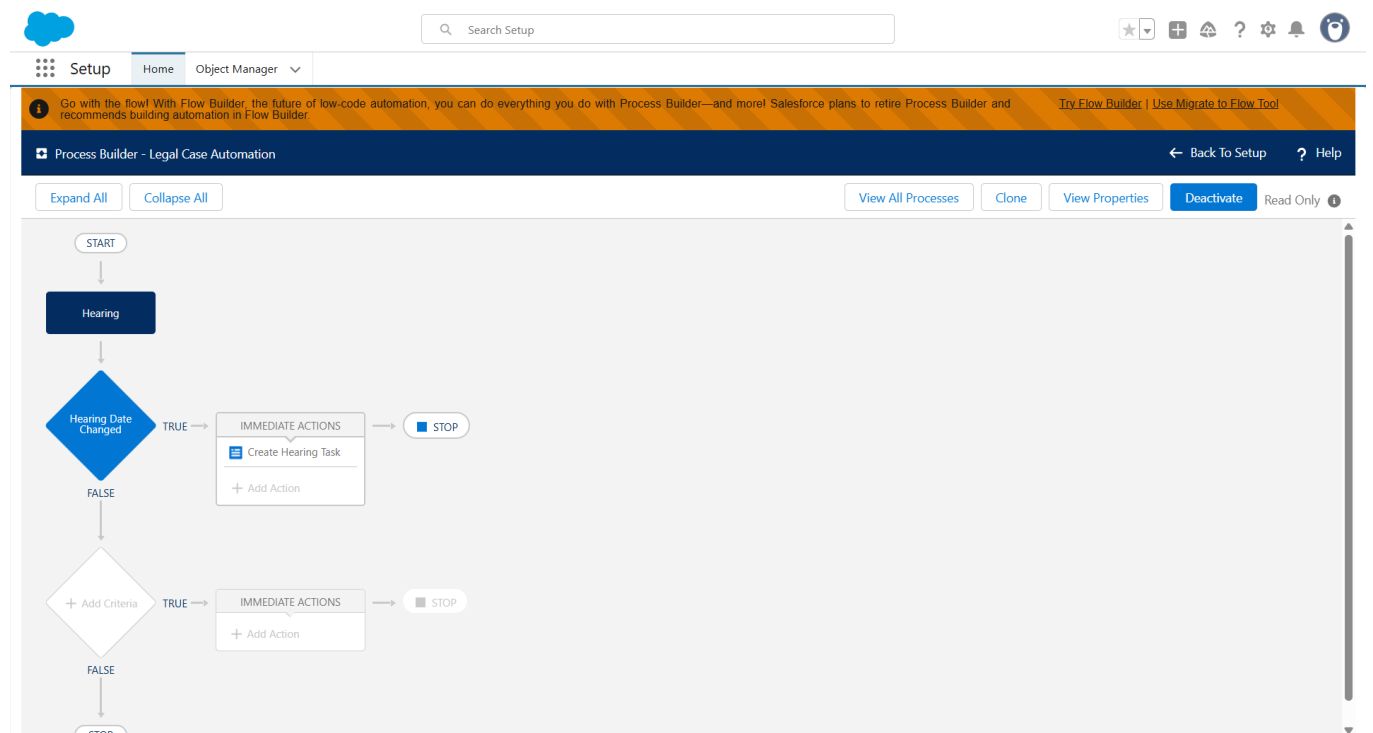
**Process Name:** Create\_Task\_On\_Case\_Update

**Purpose:** Automatically create a Task whenever a case is updated with important information.

**Criteria:** Status\_\_c is changed AND is not null

**Immediate Action:** Create Task

- Subject: "Follow-up on Case Update"
- Assigned To: Case Owner or Assigned Lawyer
- Due Date: Today or based on Status
- Related To: Legal\_Case\_\_c record



## 5. Approval Process

**Object:** Billing\_\_c

**Approval Process Name:** Client\_Bill\_Approval

**Purpose:** Ensure all client bills are approved by a Senior Lawyer before sending.

**Entry Criteria:** Status\_\_c = "Submitted"

- **Steps:**
  - Submission → Approver: Assigned Lawyer or Senior Lawyer
  - Approved → Update record / notify client
  - Rejected → Update record / notify client

**Approval Processes**

Get started with Flow Approval Processes in the Approval app where you can manage approval submissions, approval work items, and flow approval processes in one location.

[Open Approvals App](#)

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. [Create an approval process using either the Jump Start or Standard Wizard](#)
6. [Add Approval History Related List to all page layouts](#)
7. [Activate the process to deploy to your users](#)

Manage Approval Processes For: **Court Order**

A listing of both active and inactive approval processes for **Court Orders** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

[Create New Approval Process](#)

**Active Approval Processes**

Action	Process Order	Approval Process Name	Description
<a href="#">Edit</a>   <a href="#">Deactivate</a>	1	<a href="#">Court_Order_Approval</a>	Approves court orders above 10,000 or submitted status.

**Inactive Approval Processes**

Action	Approval Process Name	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Rejected_Action</a>	

## 6. Flow 1 — Procurement → Traceability Ledger

**Object:** Legal\_Case\_\_c

**Trigger:** Record-created

**Action:** Automatically create a Case\_Ledger\_\_c record

**Field Mapping:**

- Related Case → {!\$Record.Id}
- Stage → “Created”
- Record Date → {!\$Flow.CurrentDateTime}

**Purpose:** Logs case entries automatically for auditing and traceability.

Flow Builder

Flow on Buying - V2

Select Elements

Auto-Layout

Last saved on 23/9/2025, 11:06 pm

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow Start

Run Immediately

Create Traceability Ledger Create Records

End

Create Records

Label

Create Traceability Ledger

API Name

Create\_Traceability\_Ledger

Description

How to set record field values

Manually

Create a Record of This Object

Object

Traceability Ledger

Set Field Values for the Traceability Ledger

Field

Movement Date

Value

Running Flow Interview > CurrentDateTime

Field

Traceability Ledger Name

Value

ggering Procurement\_c > Procurement Name

Field

Notes

Value

Any Suggestions will be given here

## 7. Flow 2 — Crop\_Cycle → Advisory

**Object:** Legal\_Case\_\_c

**Trigger:** Record-created

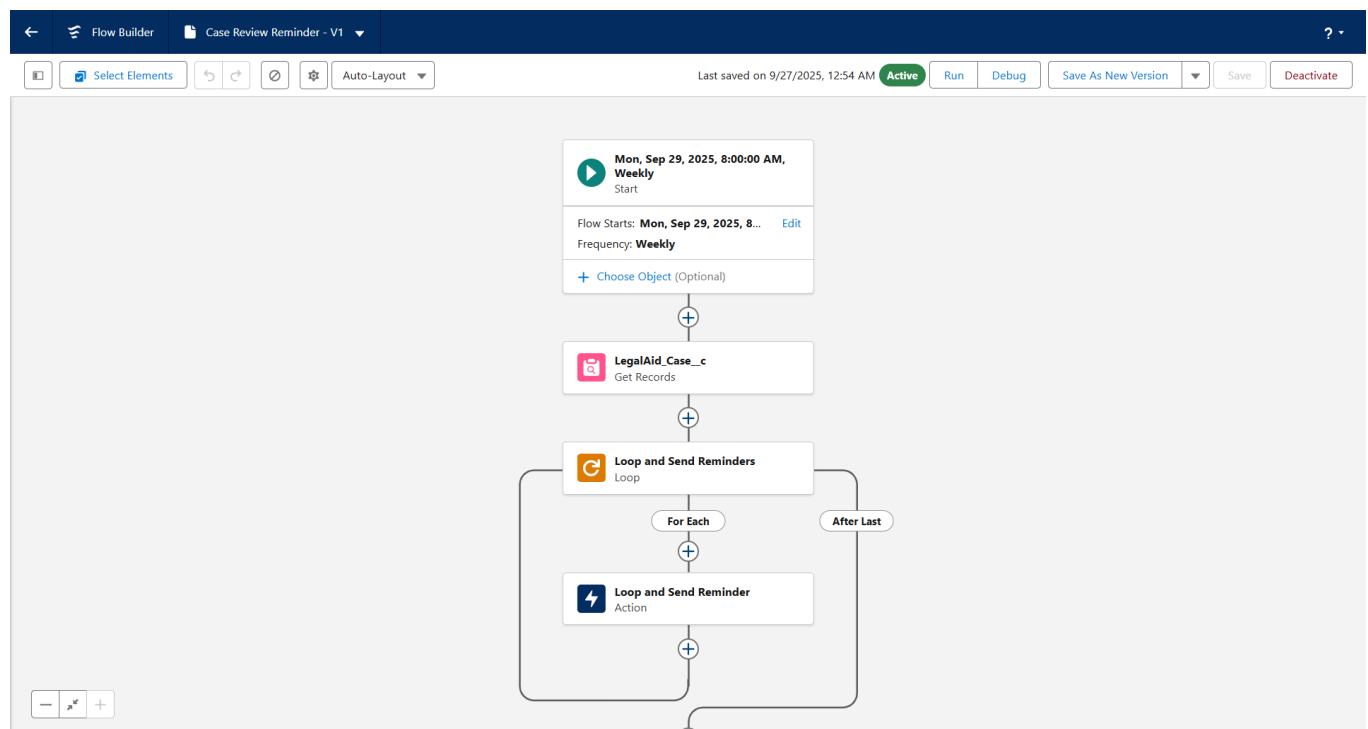
**Decision:** Case Type = "Civil"

**Action:** Create Advisory\_\_c record

**Field Mapping:**


- **Advisory Name** → "Advisory for Case " & {!\$Record.Case\_Name\_\_c}
- **Advisory Date** → {!\$Flow.CurrentDate}
- **Advisory Text** → "Please follow instructions regarding your case type."
- **Related Client** → {!\$Record.Related\_Client\_\_c}
- **Owner** → Assigned Lawyer

**Purpose:** Automates advisory suggestions for clients upon case registration.



## 8. Escalation Rules

- **Escalation Rule 1 – Advisory Not Acknowledged:**
  - Object: Case (linked to Advisory)
  - Condition: Advisory not acknowledged within 48 hours
  - Escalation: Assign to Senior Lawyer or Case Manager
- **Escalation Rule 2 – Billing Approval Pending:**
  - Object: Billing\_\_c
  - Condition: Status = Submitted for more than 72 hours
  - Escalation: Escalate to Senior Lawyer



SETUP

Escalation Rules

Case Escalation Rules

Help for this Page

Automatically determine when cases should escalate and what actions to take. After you create a rule, select it from the rules list and add rule entries.

New

Action	Rule Name	Active	Created By	Created On
<a href="#">Rename</a>   <a href="#">Del</a>	Legal Case Escalation Rule	<input checked="" type="checkbox"/>	GOWNI SRIJITHA	9/27/2025
<a href="#">Rename</a>   <a href="#">Del</a>	Standard	<input type="checkbox"/>	OrgFarm EPIC	9/19/2025

## 9.Scheduled Flows

- **Scheduled Flow 1 – Advisory Reminder:** If an advisory is not marked “Completed” within 3 days, send a reminder email to the client.
- **Scheduled Flow 2 – Court Hearing Alert:** Send notifications 7 days before the scheduled court hearing.
- **Scheduled Flow 3 – Billing Reminder:** Send a reminder to clients 5 days before bill due date.

## 10. Phase 4 Outcome

- Data integrity is enforced with **Validation Rules**
- Farmers are automatically notified via **Workflow Rule**
- Tasks for harvest follow-ups are auto-created via **Process Builder**
- Procurement requests are approved systematically via **Approval Process**
- Traceability Ledger and advisories are auto-generated via **Flows**

**Phase 4 is complete and ready for inclusion in the final project report.**