

AgriTrust Connect – Phase 4: Process Automation (Admin) Report

Project Title: AgriTrust Connect – Sustainable Agriculture CRM

Phase: 4 – Process Automation (Admin)

Date: 23 September 2025

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1. Introduction

Phase 4 focused on automating business processes in AgriTrust Connect. The objective was to reduce manual effort, ensure data accuracy, enforce process rules, and provide timely notifications to stakeholders. Automation was implemented using **Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flows**.

2. Validation Rules

Purpose: Ensure data integrity and prevent invalid entries across the system.

| # | Rule Name | Object | Formula | Error Message |
|---|-------------------------|---------------------|-----------------------------|---|
| 1 | Crop Cycle Dates | Crop_Cycle__c | End_Date__c < Start_Date__c | End date cannot be before start date. |
| 2 | Soil pH Range | Crop_Cycle__c | 0 > pH__c < 14 | pH has to stay within the range |
| 3 | Mandatory Crop Type | Crop_Cycle__c | ISBLANK(Crop_Type__c) | Crop type is required. |
| 4 | Buyer Order Quantity | Procurement__c | Order_Qty__c <= 0 | Order quantity must be greater than zero. |
| 5 | Buyer Order Price Check | Procurement__c | Price__c <= 0 | Price must be greater than zero. |
| 6 | Farmer id Number | Contact / Farmer__c | Isnull(Farmer__c) | Farmer ID cant be empty |

| | | | | |
|-----------------------------|------------------------------|----------------|--------------------------------------|--------|
| SETUP > OBJECT MANAGER | | | | |
| Crop Cycle | | | | |
| Details | Validation Rules | | | |
| Fields & Relationships | 2 Items, Sorted by Rule Name | | | |
| Page Layouts | | | | |
| Lightning Record Pages | | | | |
| Buttons, Links, and Actions | | | | |
| Compact Layouts | | | | |
| Field Sets | | | | |
| Object Limits | | | | |
| Record Types | | | | |
| Related Lookup Filters | | | | |
| Restriction Rules | | | | |
| Scoping Rules | | | | |
| Object Access | | | | |
| Triggers | | | | |
| Flow Triggers | | | | |
| Validation Rules | | | | |
| | RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE |
| | Crop_Cycle_Dates | Top of Page | End date cannot be before start date | ✓ |
| | Mandatory_Crop_Type | Top of Page | Crop type is required. | ✓ |

Validation Rules

2 Items, Sorted by Rule Name

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|---|----------------|---|--------|--------------------------------------|
| Buyer_Order_Price_Check | Top of Page | Price must be greater than zero. | ✓ | Sri Vaishnavi B, 23/09/2025, 9:53 pm |
| Buyer_Order_Quantity | Top of Page | Order quantity must be greater than zero. | ✓ | Sri Vaishnavi B, 23/09/2025, 9:52 pm |

SETUP > OBJECT MANAGER
Contact

Details

| Validation Rules <small>1 Items, Sorted by Rule Name</small> | | | | |
|--|----------------|---------------------------|--------|---------------------------------------|
| Rule Name | Error Location | Error Message | Active | Modified By |
| Farmer_ID_Number_Format | Top of Page | Farmer ID cannot be NULL. | ✓ | Sri Vaishnavi B, 23/09/2025, 10:01 pm |

AgriTrust Connect.

Setup Home Object Manager

Search Setup

Quick Find

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management

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 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

| Action | Rule Name | Description | Object | Active |
|---|---|-------------|----------|--------------------------|
| Edit Del Activate | Email Farmer When Advisory is Published | | Advisory | <input type="checkbox"/> |

Quick Tips

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

4. Process Builder

Object: Crop_Cycle__c

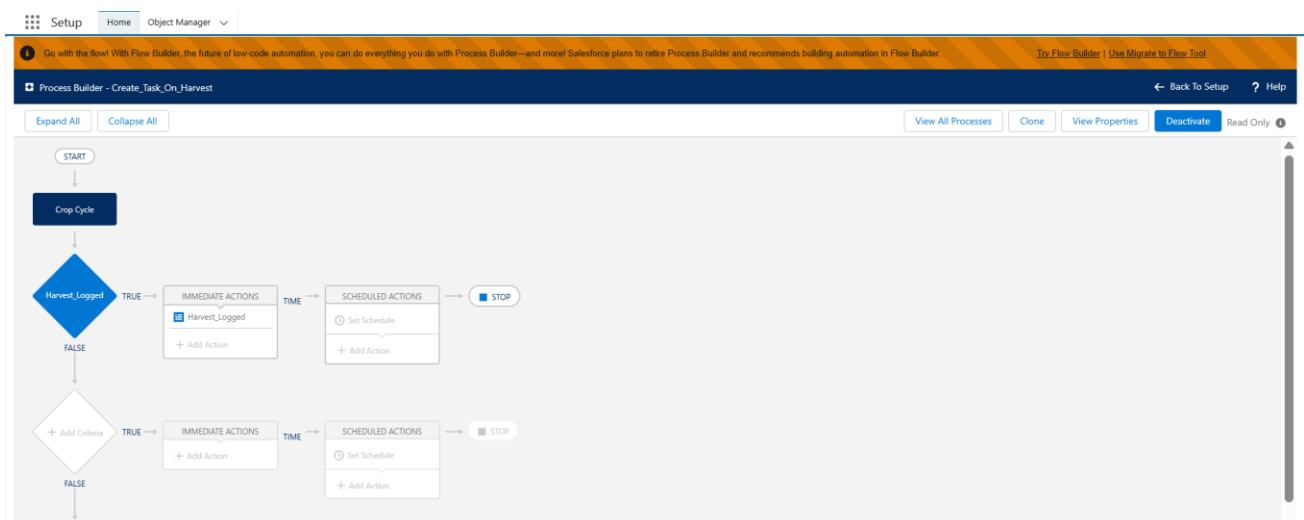
Process Name: Create_Task_On_Harvest

Purpose: Automatically create a Task whenever a harvest date is logged.

Criteria: Harvest_Date__c is changed AND is not null

Immediate Action: Create Task

| Field | Value |
|-------------|------------------------------|
| Subject | "Harvest Logged – Follow Up" |
| Assigned To | Owner or Agronomist |
| Due Date | Today or Harvest_Date__c |
| Related To | Crop_Cycle__c record |



5. Approval Process

Object: Procurement__c

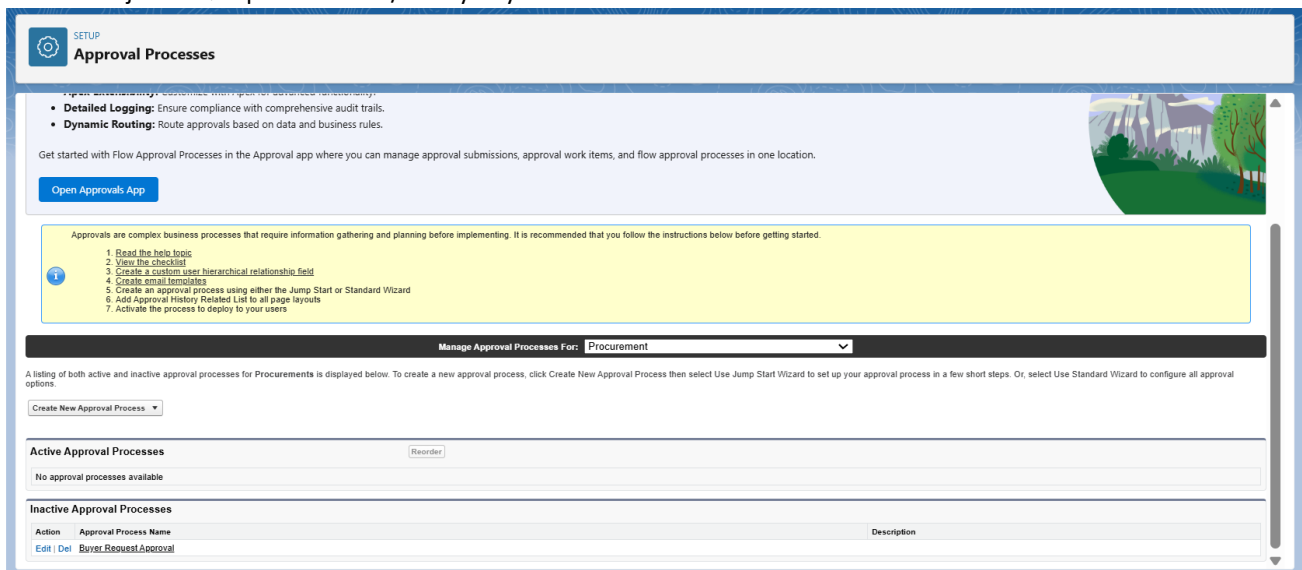
Approval Process Name: Buyer_Request_Approval

Purpose: Ensure all buyer requests are approved by an Agronomist before processing.

Entry Criteria: Status__c = "Submitted"

Steps:

- Submission → Approver: Related Farmer
- Approved → Update record / notify buyer
- Rejected → Update record / notify buyer



6. Flow 1 — Procurement → Traceability Ledger

Object: Procurement__c

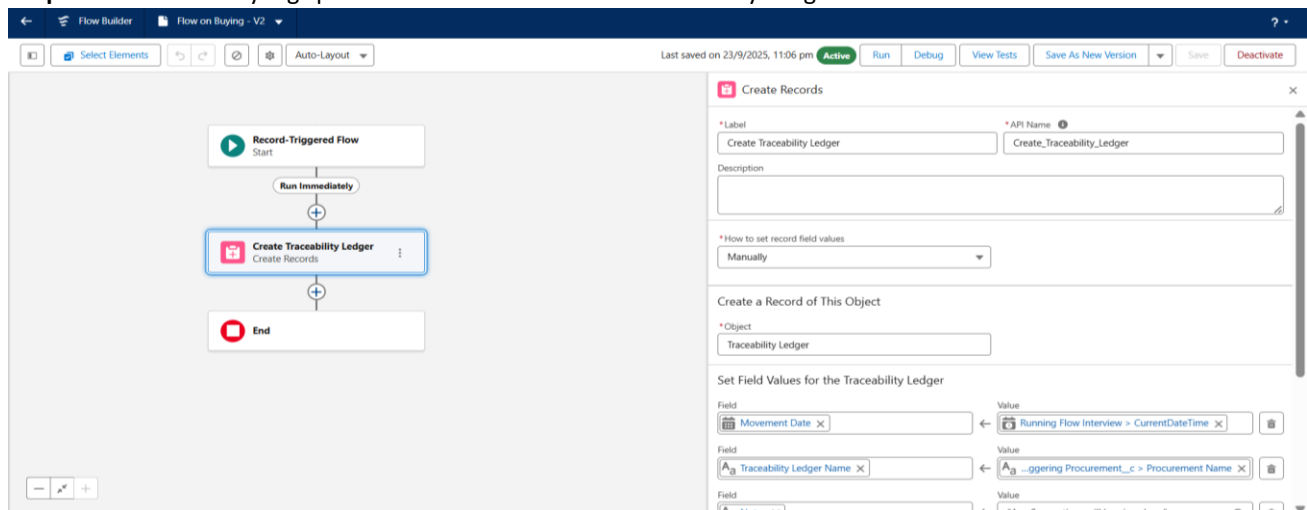
Trigger: Record-created

Action: Create a Traceability_Ledger__c record automatically

Field Mapping:

| Field | Value |
|---------------------|---------------------------|
| Related Procurement | {!\$Record.Id} |
| Stage | "Created" |
| Movement Date | {!\$Flow.CurrentDateTime} |

Purpose: Automatically logs procurement entries into the Traceability Ledger.



7. Flow 2 — Crop_Cycle → Advisory

Object: Crop_Cycle__c

Trigger: Record-created

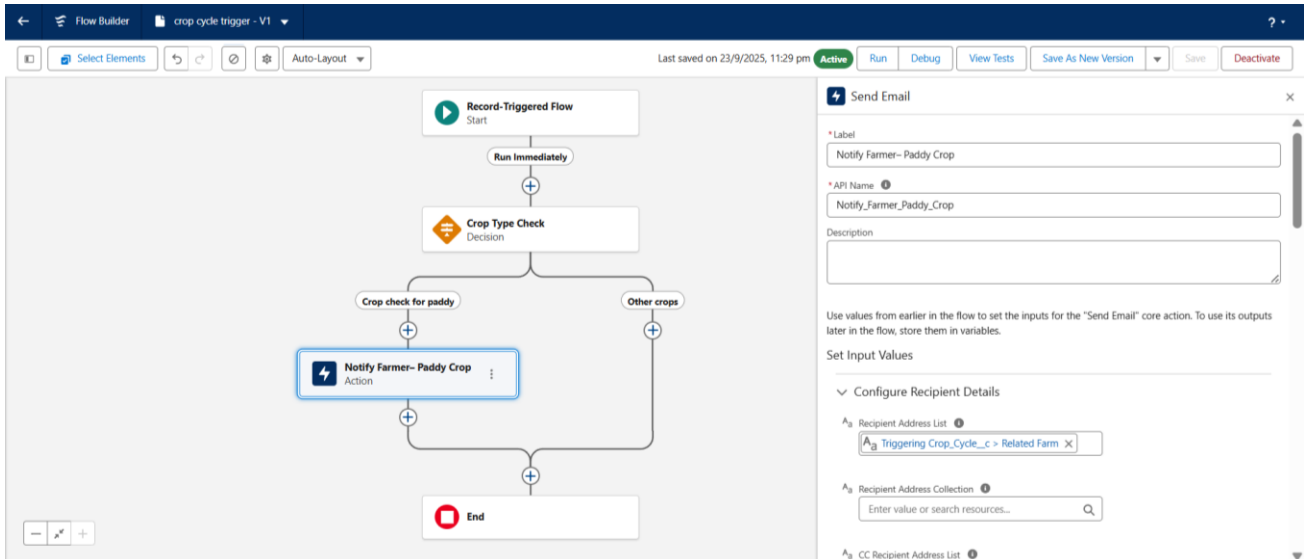
Decision: Crop type = Paddy (optional: extend for other crops)

Action: Create Advisory__c record

Field Mapping:

| Field | Value |
|---------------------|--|
| Advisory Name | "Advisory for " & {!\$Record.Name} |
| Advisory Date | {!\$Flow.CurrentDate} |
| Advisory Text | "Please follow best practices for " & {!\$Record.Crop_Name__c} |
| Related Farmer | {!\$Record.Related_Farm__c} |
| Owner / Office User | Assign to Agronomist |

Purpose: Automates advisory suggestions for farmers upon crop submission.



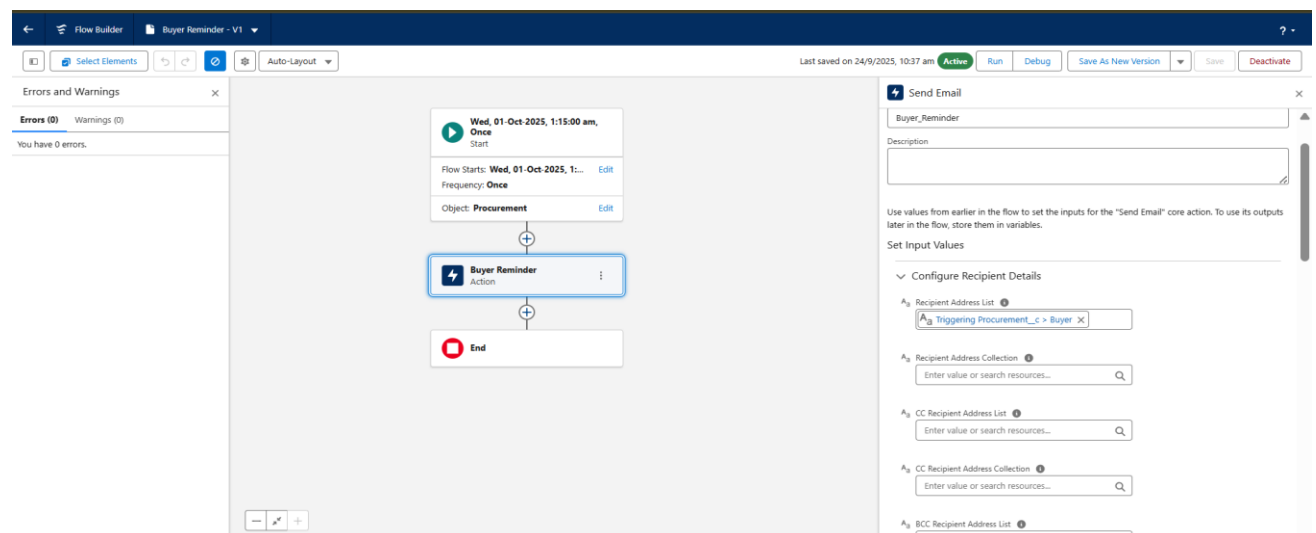
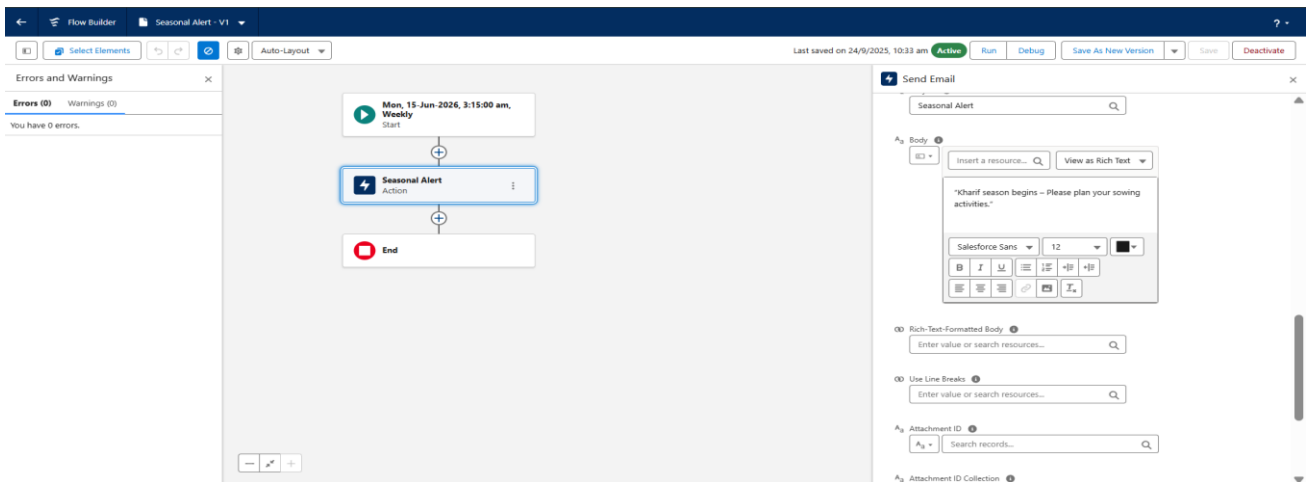
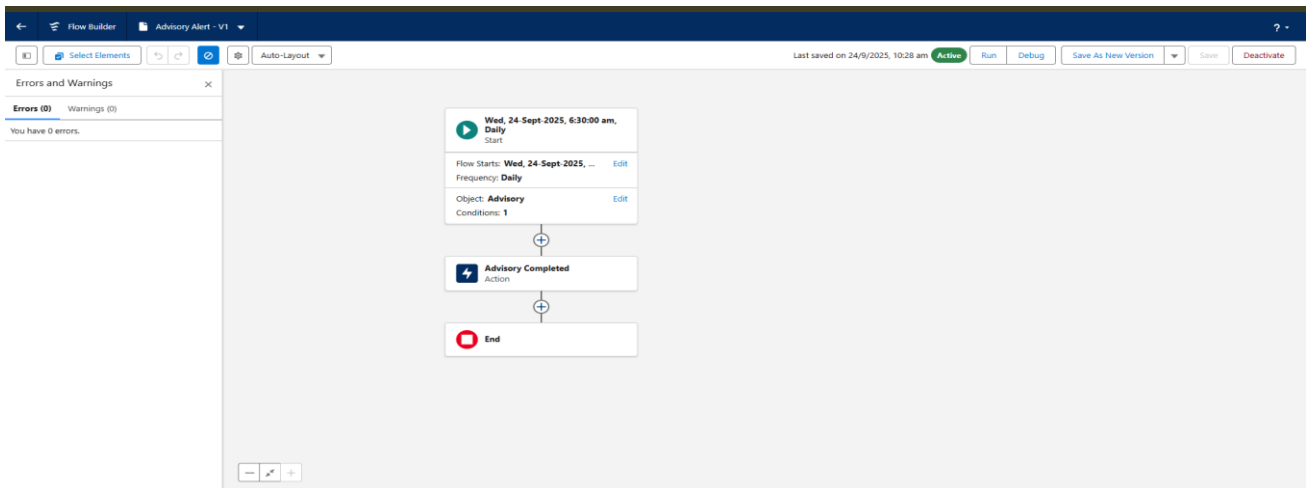
8.Escalation Rules

- Escalation Rule 1 – Advisory Not Acknowledged
 - Object: Case (linked to Advisory)
 - Condition: Advisory not acknowledged within 48 hours
 - Escalation: Assign to Extension Officer
- Escalation Rule 2 – Procurement Approval Pending
 - Object: Procurement__c
 - Condition: Status = Submitted for more than 72 hours
 - Escalation: Escalate to Procurement Manager

| SETUP Escalation Rules | | | | |
|---|--|--------------------------|-----------------|------------|
| Case Escalation Rules | | | | |
| Automatically determine when cases should escalate and what actions to take. After you create a rule, select if from the rules list and add rule entries. | | | | |
| New | | | | |
| Action | Rule Name | Active | Created By | Created On |
| Rename Del | Advisory Escalation | <input type="checkbox"/> | Sri Vaishnavi B | 24/09/2025 |
| Rename Del | Procurement Escalation | <input type="checkbox"/> | Sri Vaishnavi B | 24/09/2025 |
| Rename Del | Standard | <input type="checkbox"/> | OrgFarm EPIC | 18/09/2025 |

9. Scheduled Flows

- Scheduled Flow 1 – Advisory Reminder
 - If an advisory is not marked as “Completed” within 3 days → Send reminder email to farmer.
- Scheduled Flow 2 – Seasonal Alert
 - On June 15 (start of Kharif) → Send notification to farmers: “Kharif season begins – Please plan your sowing activities.”
- Scheduled Flow 3 – Buyer Reminder
 - 7 days before Procurement “Delivery Date” → Send email reminder to buyer.



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.