

**Project Title:** AgriTrust Connect – Sustainable Agriculture CRM  
**Phase:** 4 – Process Automation (Admin)  
**Date:** 23 September 2025  
**Prepared By:** SRI VAISHNAVI B

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**.

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

SETUP > OBJECT MANAGER

Crop Cycle

Details

Fields & Relationships

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**

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Crop_Cycle_Dates	Top of Page	End date cannot be before start date	✓	Sri Vaishnavi B, 23/09/2025, 9:42 pm
Mandatory_Crop_Type	Top of Page	Crop type is required.	✓	Sri Vaishnavi B, 23/09/2025, 9:49 pm

**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  
  
 Fields & Relationships  
  
 Page Layouts  
  
 Lightning Record Pages  
  
 Buttons, Links, and Actions  
  
 Compact Layouts  
  
 Field Sets  
  
 Object Limits  
  
 Record Types  
  
 Related Lookup Filters  
  
 Search Layouts  
  
 List View Button Layout  
  
 Hierarchy Columns  
  
 Scoping Rules  
  
Object Access

### Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
<a href="#">Farmer_ID_Number_Format</a>	Top of Page	Farmer ID cannot be NULL.	✓	<a href="#">Sri Vaishnavi B</a> , 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
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	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

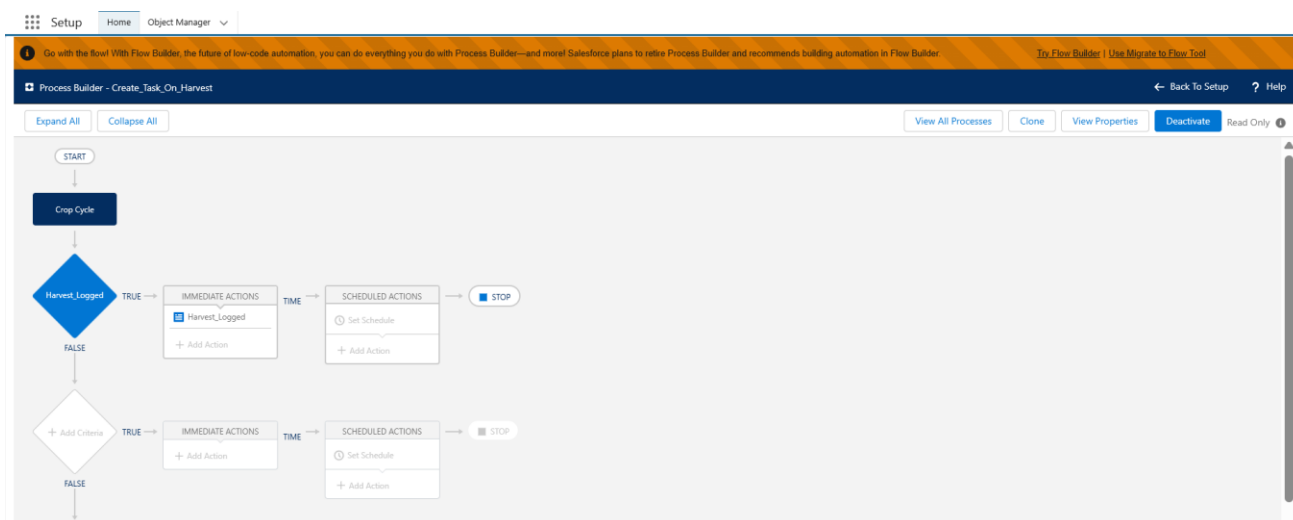
**Process Name:** Create\_Task\_On\_Harvest

**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

The screenshot shows the 'Approval Processes' setup page in Salesforce. At the top, there's a 'SETUP' header and a 'Approval Processes' title. Below this, there's a section for 'Approval Processes' with a list of features: 'Detailed Logging' (Ensure compliance with comprehensive audit trails) and 'Dynamic Routing' (Route approvals based on data and business rules). A note states: '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.' There's a button 'Open Approvals App'. Below this, a yellow box contains a list of steps to get 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. A dropdown menu 'Manage Approval Processes For:' is set to 'Procurement'. Below this, a section 'Active Approval Processes' shows 'No approval processes available'. A section 'Inactive Approval Processes' shows a table with one entry: 'Buyer\_Request\_Approval'.

## 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.

The screenshot shows the Salesforce Flow Builder interface. The flow is titled 'Flow on Buying - V2'. It starts with a 'Record-Triggered Flow' event, followed by a 'Run Immediately' step, then a 'Create Traceability Ledger' action (Create Records). The flow ends with an 'End' step. On the right, the 'Create Records' configuration panel is open. It shows the label 'Create Traceability Ledger' and the API Name 'Create\_Traceability\_Ledger'. The description is empty. The 'How to set record field values' is set to 'Manually'. The 'Object' is 'Traceability Ledger'. The 'Set Field Values for the Traceability Ledger' section shows three fields: 'Movement Date' (Value: Running Flow Interview > CurrentDateTime), 'Traceability Ledger Name' (Value: Generating Procurement\_\_c > Procurement Name), and 'Notes' (Value: Any Suggestions will be given here).

## 7. Flow 2 — Crop\_Cycle → Advisory

**Object:** Crop\_Cycle\_\_c

**Trigger:** Record-created

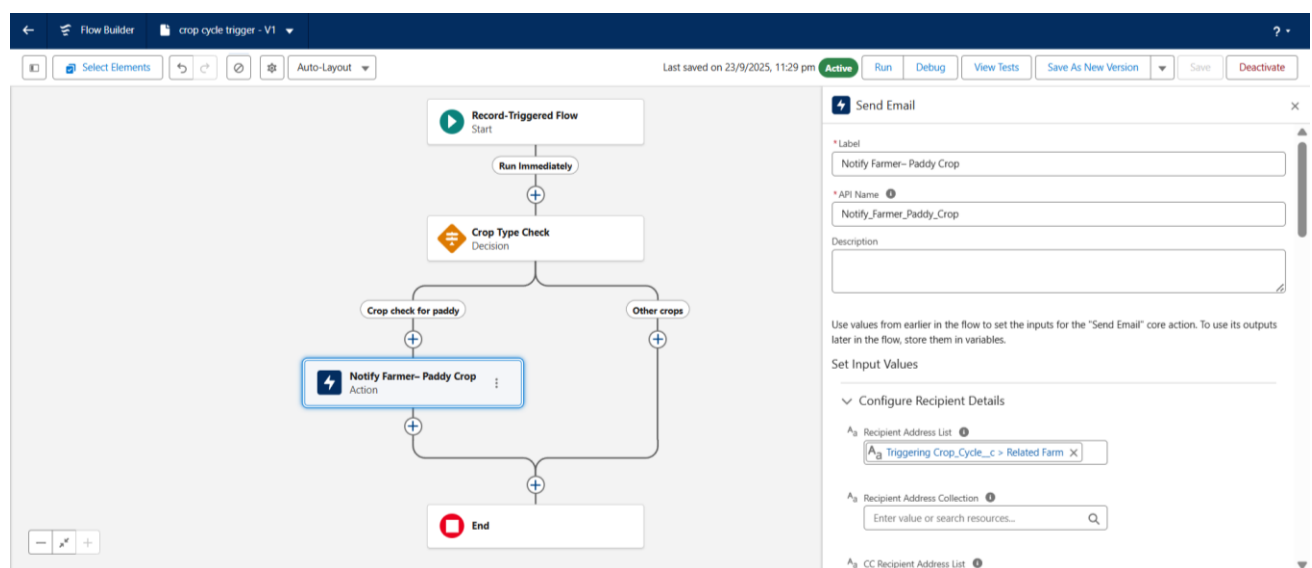
**Decision:** Crop type = Paddy (optional: extend for other crops)

**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. 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.**