

Phase 4 – Process Automation (Ashok Motors Capstone)

Objective:

Automate business processes in Ashok Motors using Salesforce Admin tools like Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flow Builder to improve efficiency and reduce manual effort.

1. Validation Rules

- **Purpose:** Ensure data integrity during record creation or update.
- **Examples:**
 1. Vehicle__c: Price__c must be greater than 0
 2. Test_Drive__c: Preferred_Date__c cannot be in the past
- **Screenshot:** * A service appointment cannot be scheduled in the past.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options: 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, and Triggers. The main content area is titled 'Service_Appointment__c' and displays a 'Validation Rule Detail' for 'Service_Appointment__c Validation Rule'. The rule is active and has the following details:

Validation Rule Detail	
Rule Name	Validate_Appointment_Date
Error Condition Formula	DATEVALUE(Appointment_Date__c) < TODAY()
Error Message	Appointment Date cannot be in the past.
Description	Prevent past date in Service Appointment
Created By	Suryansh Singh, 9/20/2025, 3:22 AM
Modified By	Suryansh Singh, 9/20/2025, 3:22 AM

The rule is active, as indicated by the 'Active' checkbox being checked. There are 'Edit' and 'Clone' buttons next to the rule name and at the bottom of the details section. The error location is specified as 'Appointment_Date'.

4. Approval Processes

- **Purpose:** Automate approvals for critical operations like discounts or invoice approval.
- **Example:**
 - Invoice__c with Amount__c > 5,00,000 requires Regional_Manager approval
- **Screenshot:** Opportunity: Discount_Approval_Process opportunity: Discount greater than 0.10

Setup

Home

Object Manager

Search Setup

Approval Processes

Opportunity: Discount_Approval_Process

Process Definition Detail

Initial Submission Actions

Approval Steps

Approvals

Home

Items to Approve | A...

Test Opportunity Ap...

Approval Request

Opportunity Approval

Pending

Approve

Reject

Reassign

Submitter

Suryansh Singh

Date Submitted

Sep 20, 2025

Actual Approver

Dealer Manager

Assigned To

Dealer Manager

Details

Approval Details

Opportunity Name

Test Opportunity

Account Name

Discount

15.00%

Close Date

9/21/2025

Opportunity Owner

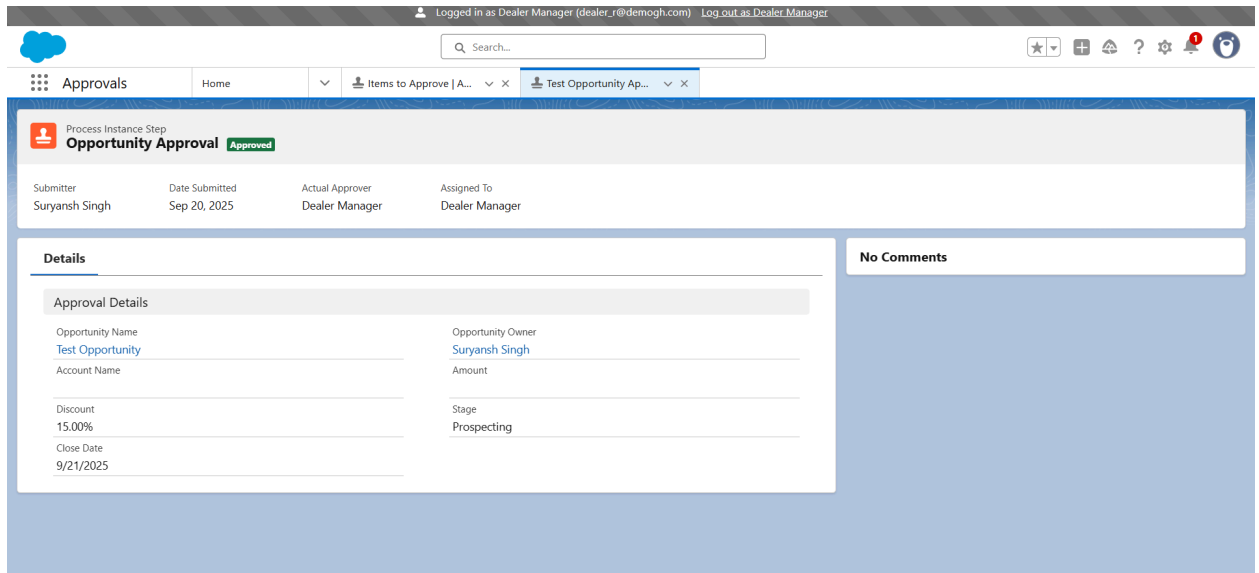
Suryansh Singh

Amount

Stage

Prospecting

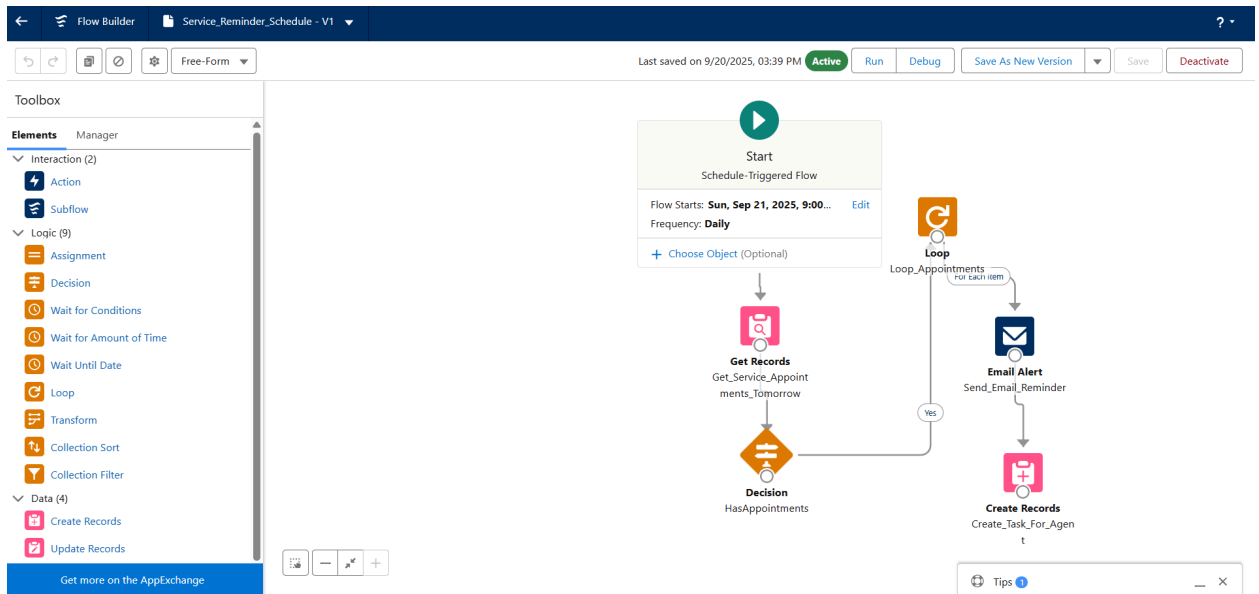
No Comments



Next Automated Approver Determined By Manager of Record Submitter

5. Flow Builder

- **Types Used:**
 - **Screen Flows:** Customer registration and test drive request form
 - **Record-Triggered Flows:** Auto-update Vehicle__c status when Test_Drive__c completed
 - **Scheduled Flows:** Weekly follow-up reminders to SalesReps
- **Email Alerts & Tasks:** Integrated within flows for notifications
- **Screenshot:**



6. Custom Notifications & Field Updates

- **Purpose:** Notify users about important actions via Salesforce notifications and update key fields automatically.
- Example: Update `Vehicle__c.Status__c` to "Available" after `Test_Drive__c` completion
- **Screenshot:**

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Search...

Star

Grid

Help

Settings

2

Profile

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Recently Viewed

"Service Appointment Reminder"

suryansh ji

9/21/2025

[No subject]

suryansh ji

9/21/2025

Task

"Service Appointment Reminder"

Mark Complete

Edit Comments

Change Date

Create Follow-Up Task

Name

Related To

suryansh ji

Details

Related

Assigned To

Suryansh Singh

Subject

"Service Appointment Reminder"

Due Date

9/21/2025

Priority

Normal

Created By

OrgFarm EPIC, 9/20/2025, 8:36 PM

Comments

Status

Not Started

Name

Related To

suryansh ji

Last Modified By

OrgFarm EPIC, 9/20/2025, 8:36 PM

92+

Mail

Chat

Meet

Compose

Inbox 982

Starred

Snooded

Sent

Drafts

More

Labels

Search mail

Active

Google

Service Appointment: October 10, 2025

Suryansh Singh

kd2kg5j16xlyz0.gi-bmddfjua1.can98.bnc.salesforce.com

12:47 PM (1 minute ago)

Be careful with this message.

This message appears to be sent from your account but Gmail couldn't verify this. Someone might be impersonating your account. If you're not sure the message is from you, use caution when clicking links, downloading attachments, or replying with personal information.

Report spam

Looks safe

New Task

To: Sales Rep

Suryansh Singh has assigned you the following new task:

Subject: Service Appointment: October 10, 2025

Contact: santosh singh

Priority: Normal

Comments: Service appointment for 003gL00000CusV3QAJ on October 10, 2025

For more details, click the following link:

https://orgfarm-e1fabaf8e-dev-ed.develop.my.salesforce.com/00Tgl_0000020Rd