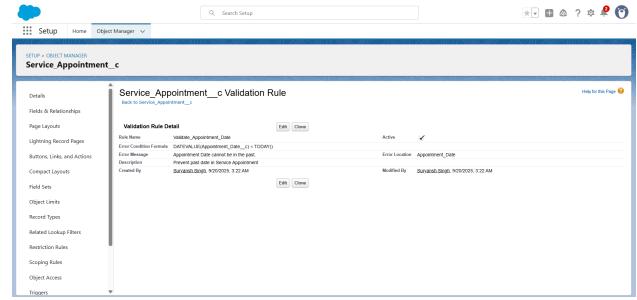# Phase 4 – Process Automation (Ashok Motors Capstone)

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.
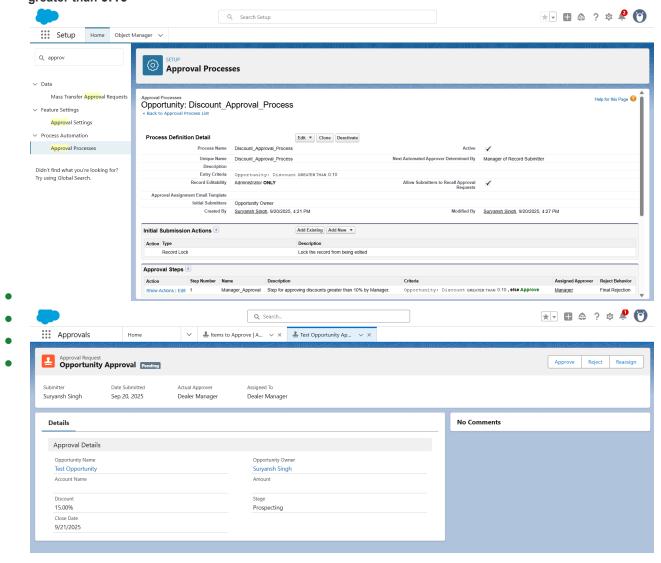

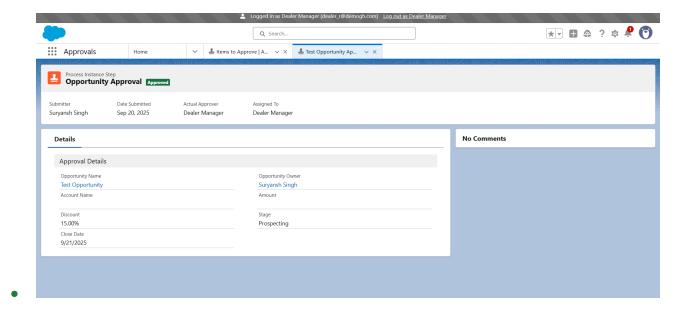## 1. Validation Rules

- **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.

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`

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:**

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

Status
Not Started

Name

Related To
suryansh ji

Last Modified By
OrgFarm EPIC, 9/20/2025, 8:36 PM

Comments

To Do List

Gmail

Compose

Mail
Chat
Meet

Inbox — 982
Starred
Snoozed
Sent
Drafts
More

Labels

Search mail

Active — Google

Service Appointment: October 10, 2025 — Inbox

1 of 1,404

Suryansh Singh via kd2kg5j16xlyz0.gl-bmdfjual.can98.bnc.salesforce.com
to me

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-e1fabafb8e-dev-ed.develop.my.salesforce.com/00TgL000002I0Rd