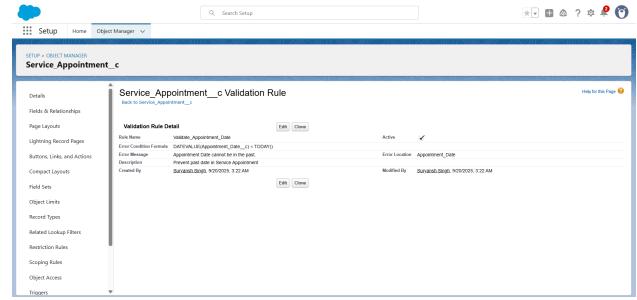# Phase 4 – Process Automation (Ashok Motors Capstone)

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.
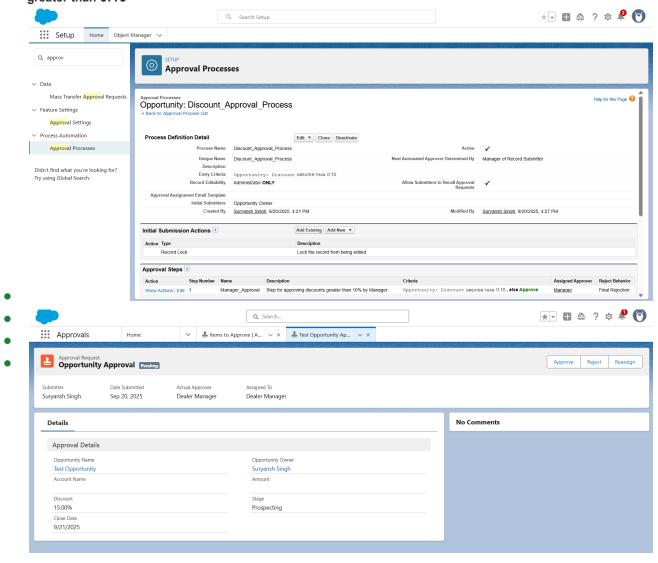
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1. Validation Rules

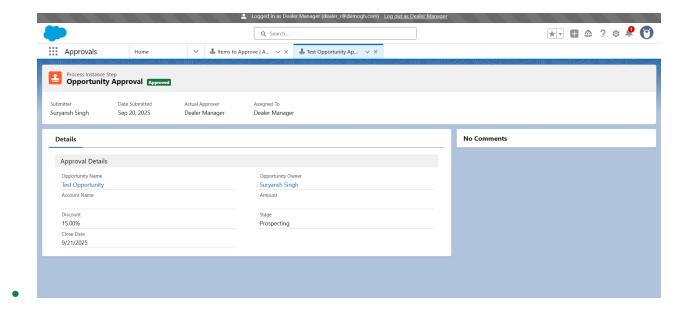- **Purpose:** Ensure data integrity during record creation or update.

- **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.

2. 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

3. 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:**

---

4. 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 ∨

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Name
Related To
suryansh ji

Details Related

Assigned To
Suryansh Singh

Status
Not Started

Subject
"Service Appointment Reminder"

Name

Due Date
9/21/2025

Related To
suryansh ji

Priority
Normal

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

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

Comments

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1 of 1,404

Service Appointment: October 10, 2025 Inbox ×

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

12:47 PM (1 minute ago) ☆ ↩ ⋮

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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