

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 displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Service_Appointment__c' and shows the 'Validation Rule Detail' for the '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. The 'Error Location' is set to 'Appointment_Date'. The 'Created By' and 'Modified By' fields both show 'Suryansh Singh' with the timestamp '9/20/2025, 3:22 AM'.

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

Setup

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Approval Processes

Approval Processes

Opportunity: Discount_Approval_Process

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Process Definition Detail			
Process Name	Discount_Approval_Process		Active <input checked="" type="checkbox"/>
Unique Name	Discount_Approval_Process		Next Automated Approver Determined By Manager of Record Submitter
Description			
Entry Criteria	Opportunity: Discount GREATER THAN 0.10		
Record Editability	Administrator ONLY		Allow Submitters to Recall Approval Requests <input checked="" type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Opportunity Owner		
Created By	Suryansh Singh	9/20/2025, 4:21 PM	Modified By Suryansh Singh, 9/20/2025, 4:27 PM

Initial Submission Actions	
Action Type	Description
Record Lock	Lock the record from being edited

Approval Steps						
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Manager_Approval	Step for approving discounts greater than 10% by Manager.	Opportunity: Discount GREATER THAN 0.10 , else Approve	MANAGER	Final Rejection

Approvers

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Approval Request

Items to Approve | A... | Test Opportunity Ap...

Opportunity Approval

Pending

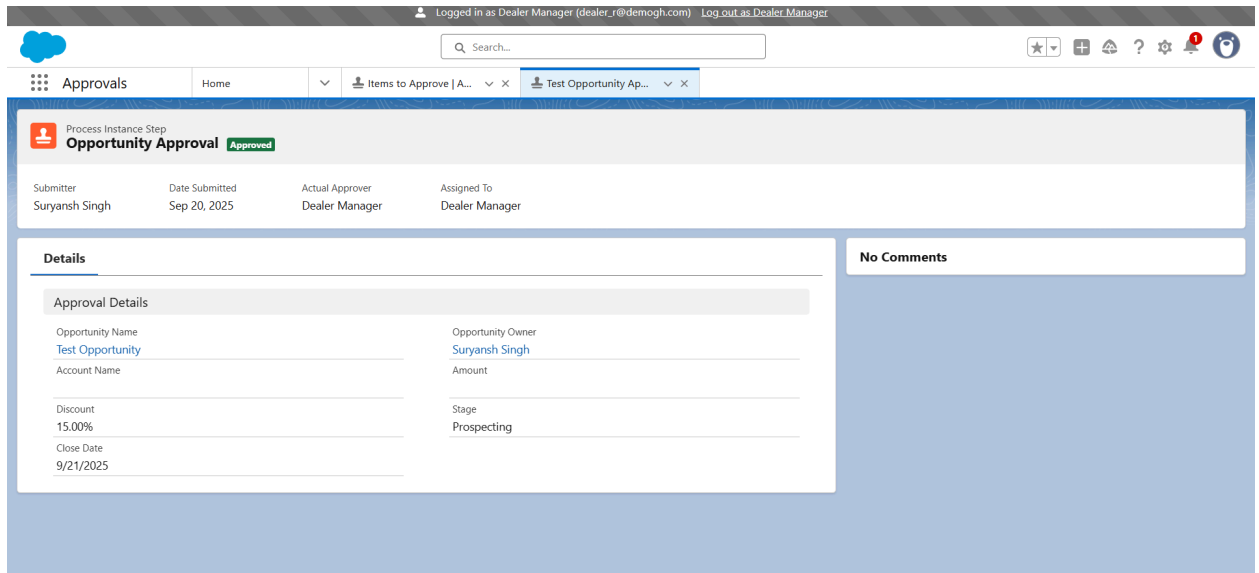
Submitter	Date Submitted	Actual Approver	Assigned To
Suryansh Singh	Sep 20, 2025	Dealer Manager	Dealer Manager

Details

Approval Details

Opportunity Name	Opportunity Owner
Test Opportunity	Suryansh Singh
Account Name	Amount
Discount	Stage
15.00%	Prospecting
Close Date	
9/21/2025	

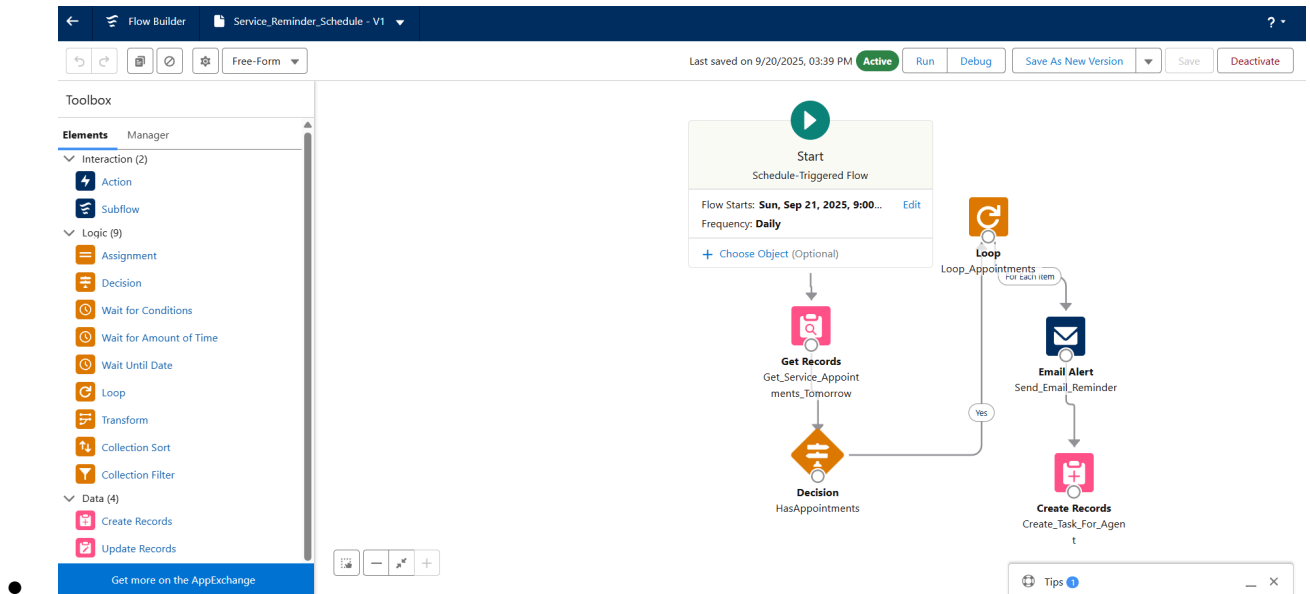
No Comments



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:**

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2 items • Updated a few seconds ago

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"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

To Do List

Compose

Inbox 982

Starred

Snooded

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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.

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