Phase 4 Report: Process Automation (Admin)

Project: Return Flow – Efficient Reverse Logistics and Return Management System

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1. Introduction

This phase focuses on implementing business process automation using Salesforce's declarative tools. Automation improves efficiency, reduces manual errors, and ensures consistent data handling. For this project, we utilized **Salesforce Flow** to automate the return request process, enhancing the experience for both administrators and customers.

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2. Objectives

- Identify key business processes in reverse logistics suitable for automation.
- Design and build a **Record-Triggered Flow** to handle return approvals and notifications.
- Ensure the flow triggers only when specific conditions are met (e.g., high-value returns or status updates).
- Test the flow thoroughly to verify its functionality and impact on related records.

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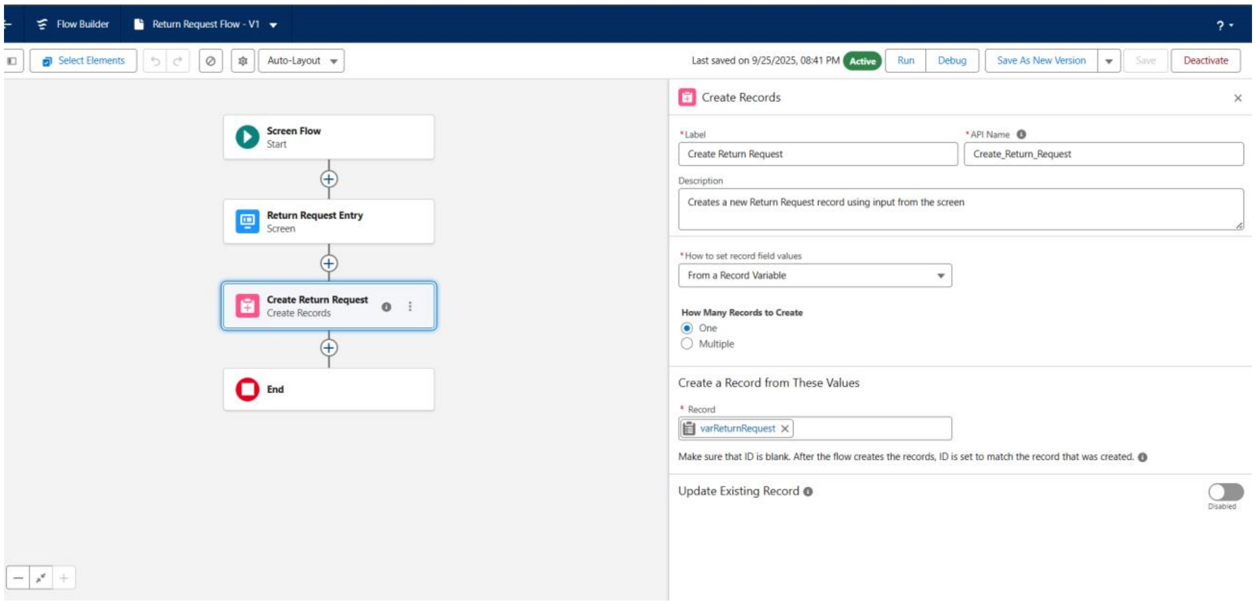
3. Automation Scenario: Customer Notification on Return Approval or Rejection

Description: In the Return Flow system, when a Return Request is updated to **Approved** or **Rejected**, customers need to be notified immediately. Manual notifications are prone to delays or errors, affecting customer satisfaction.

Solution: A **Record-Triggered Flow** was built to automatically detect updates to the Return Request status. When the Status field changes to **Approved** or **Rejected**, the Flow sends an email or custom notification to the customer with relevant details.



Create Records

*Label: Create Return Request

*API Name: Create_Return_Request

Description: Creates a new Return Request record using input from the screen

*How to set record field values: From a Record Variable

How Many Records to Create: [✓ One] Multiple

Create a Record from These Values

* Record: varReturnRequest

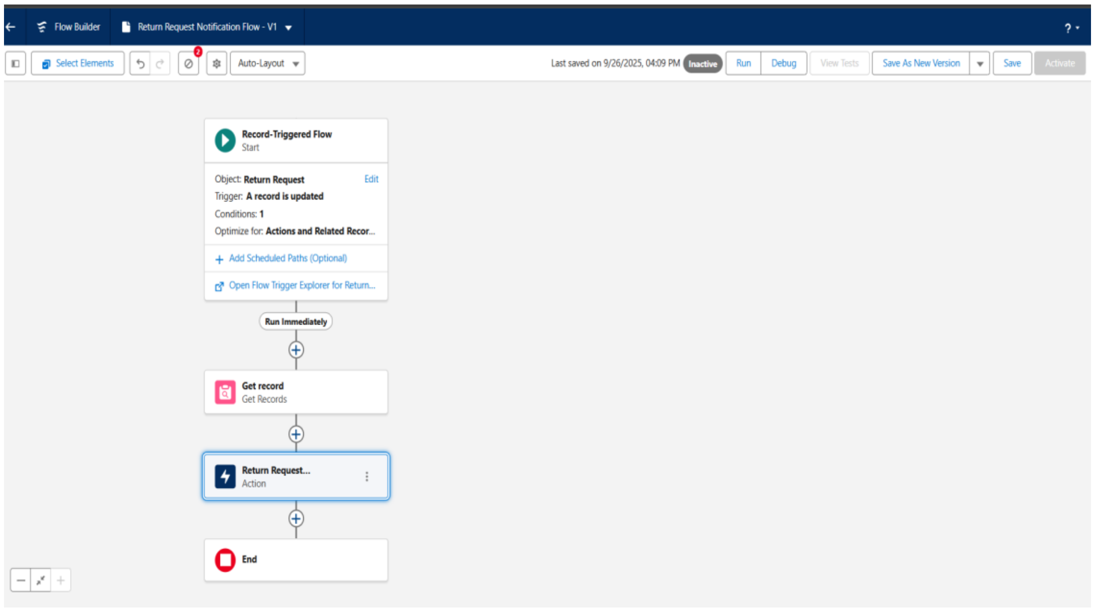
Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.

Update Existing Record: Disabled

4. Steps Performed

4.1 Flow Trigger Configuration

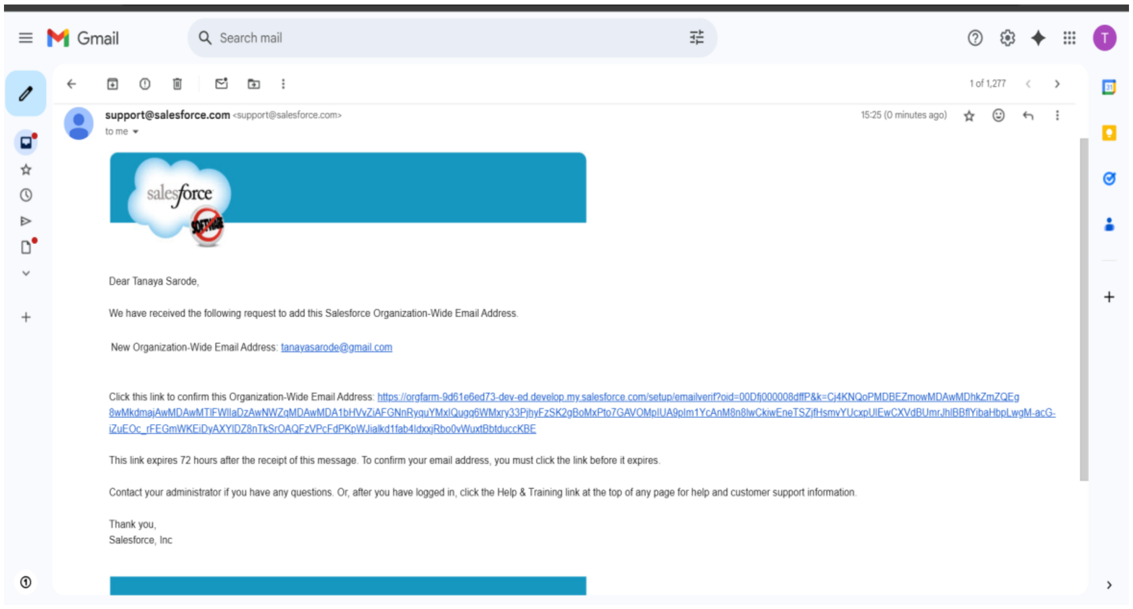
- The Flow is triggered when a **Return_Request__c** record is updated.
- Entry criteria ensure the Flow only executes when the **Status__c** field changes to **Approved** or **Rejected**, optimizing performance and avoiding unnecessary execution.
- The Flow is optimized for **Actions and Related Records** to allow notifications and email delivery.



Object: Return Request
Trigger: A record is updated
Conditions: 1
Optimize for: Actions and Related Recor...

4.2 Send Email / Notification Action

- A **Send Email** action was added to the Flow, using a template containing:
  - Return Request number
  - Status (Approved/Rejected)
  - Reason for return and next steps
- Optionally, a **Send Custom Notification** action was configured to alert internal users (e.g., warehouse team or admin) about the status update.
- The recipient is the customer linked to the Return Request, ensuring timely communication.



support@salesforce.com <support@salesforce.com>

Dear Tanaya Sarode,

We have received the following request to add this Salesforce Organization-Wide Email Address.

New Organization-Wide Email Address: tanayasarode@gmail.com

Click this link to confirm this Organization-Wide Email Address: https://orgfarm-9d61e6ed73-dev-ed.develop.my.salesforce.com/setup/emailverif?oid=00Dfj000008dffP&k=Cj4KNQoPMDBEZmowMDAwMDhkZmZQEg8wMkdmajAwMDAwMTlFWllaDzAwNWZqMDAwMDA1bHVvZiAFGNnRyquYMxlQugg6WMxry33PjhyFzSK2gBoMxPto7GAVOMplUA9plm1YcAnM8n8lwCkiwEneTSZjfHsmvYUcxpUlEwCXVdBUmrJhlBBflYibaHbpLwgM-acG-iZuEOc_rFEGmWKEiDyAXYlDZ8nTkSrOAQFzVPcFdPKpWJialkd1fab4ldxxjRbo0vWuxtBbtduccKBE

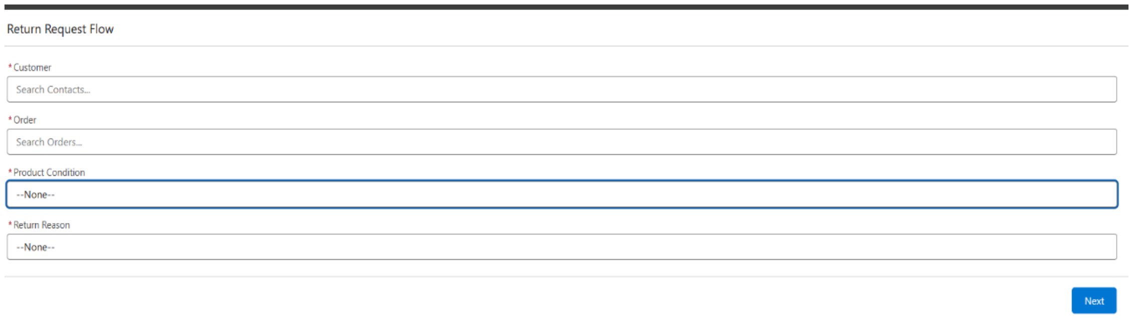
This link expires 72 hours after the receipt of this message. To confirm your email address, you must click the link before it expires.

Contact your administrator if you have any questions. Or, after you have logged in, click the Help & Training link at the top of any page for help and customer support information.

Thank you,
Salesforce, Inc

4.3 Final Flow and Activation

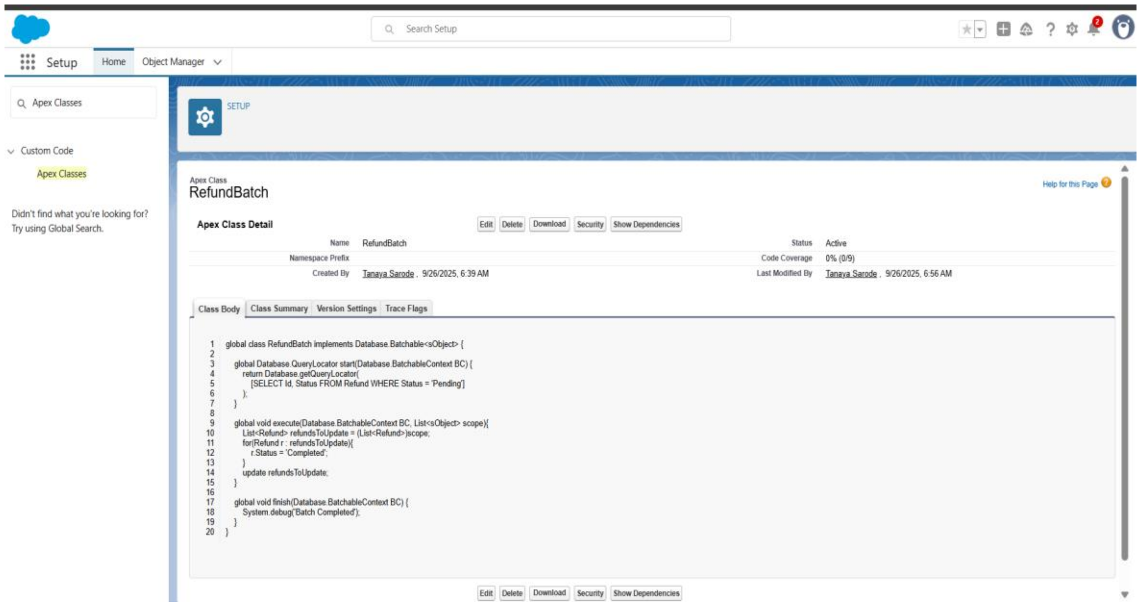
- The Flow was saved with a descriptive label and **activated**, making it live in the Salesforce org.
- The Flow canvas provides a clear visual path: **Start → Decision → Send Email/Notification → End**, showing an efficient automation logic.


Return Request Flow

* Customer	Search Contacts...
* Order	Search Orders...
* Product Condition	--None--
* Return Reason	--None--

5. Testing and Verification

- Sample Return Request records were created and updated to **Approved** and **Rejected** statuses.
- The Flow successfully triggered for each test case.
- Emails and notifications were delivered correctly, confirming that the automation works as designed.



Apex Class
RefundBatch

Apex Class Detail

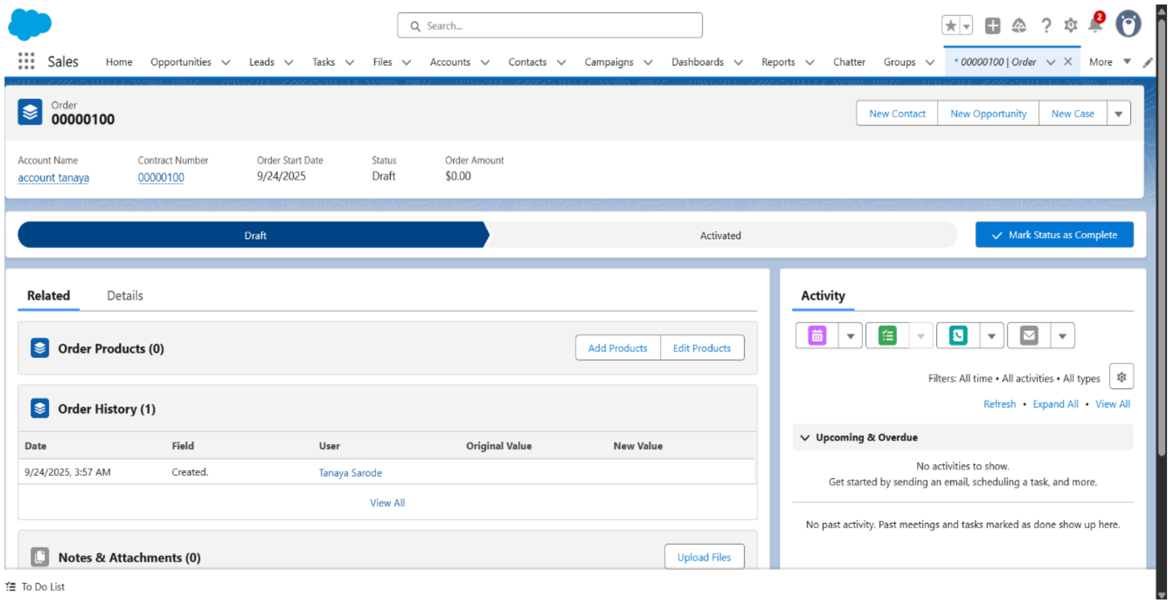
Name	RefundBatch	Status	Active
Namespace Prefix		Code Coverage	0% (0/9)
Created By	Tanaya Sarode , 9/26/2025, 6:39 AM	Last Modified By	Tanaya Sarode , 9/26/2025, 6:56 AM

```
global class RefundBatch implements Database.Batchable<sObject> {

  global Database.QueryLocator start(Database.BatchableContext BC) {
    return Database.getQueryLocator(
      [SELECT Id, Status FROM Refund WHERE Status = 'Pending']
    );
  }

  global void execute(Database.BatchableContext BC, List<sObject> scope){
    List<Refund> refundsToUpdate = (List<Refund>)scope;
    for(Refund r : refundsToUpdate){
      r.Status = 'Completed';
    }
    update refundsToUpdate;
  }

  global void finish(Database.BatchableContext BC) {
    System.debug('Batch Completed');
  }
}
```

6. Expected Outcomes

- **Reduced Manual Effort:** Eliminates the need for administrators to manually notify customers.

- **Improved Data Accuracy:** Ensures notifications correspond precisely to return request statuses.
- **Enhanced Customer Experience:** Immediate updates improve trust and satisfaction.
- **Streamlined Process:** Creates an efficient and reliable return management workflow.



Order
00000100

Account Name	Contract Number	Order Start Date	Status	Order Amount
account tanaya	00000100	9/24/2025	Draft	$0.00

Order Products (0)

Order History (1)

Date	Field	User	Original Value	New Value
9/24/2025, 3:57 AM	Created.	Tanaya Sarode		

View All

Notes & Attachments (0)

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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7. Conclusion

Phase 4 successfully demonstrated the power of Salesforce Flow in automating the Return Request process. By building and activating this Flow, the Return Flow system is now more intelligent, efficient, and customer-friendly. This foundational automation sets the stage for more complex enhancements, which can be addressed in **Phase 5: Apex Programming**.