Phase 4: Process Automation(admin)

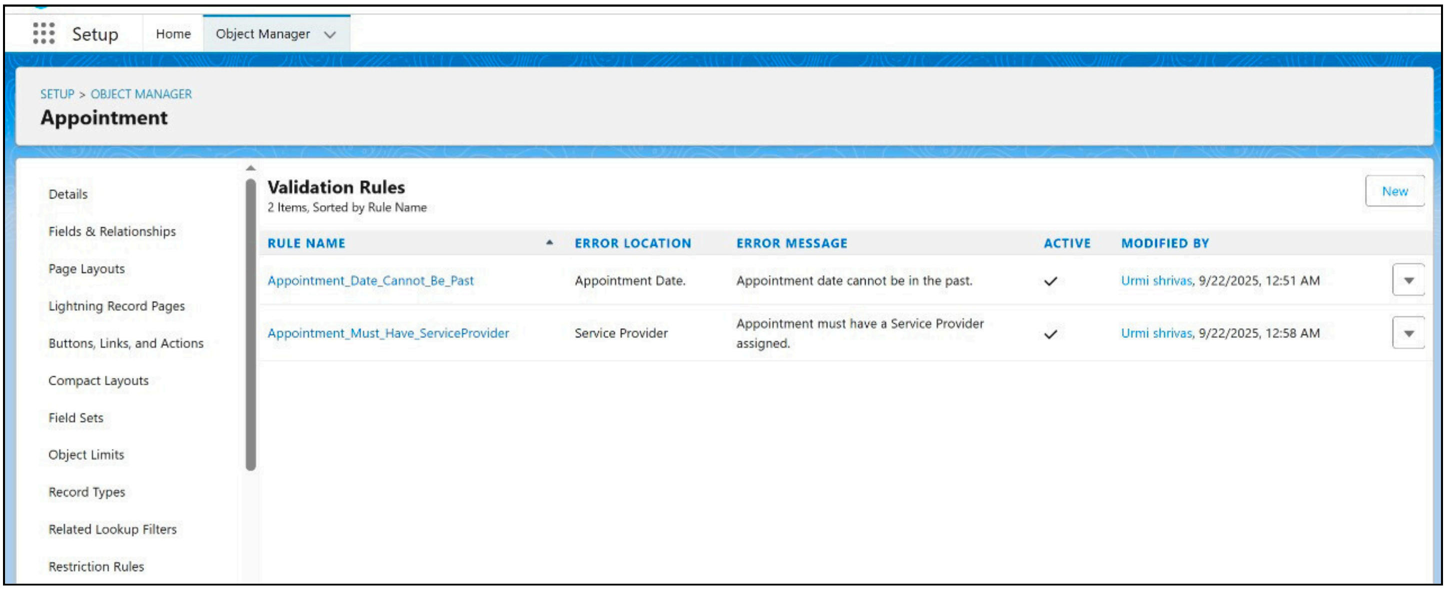
1. Validation rules

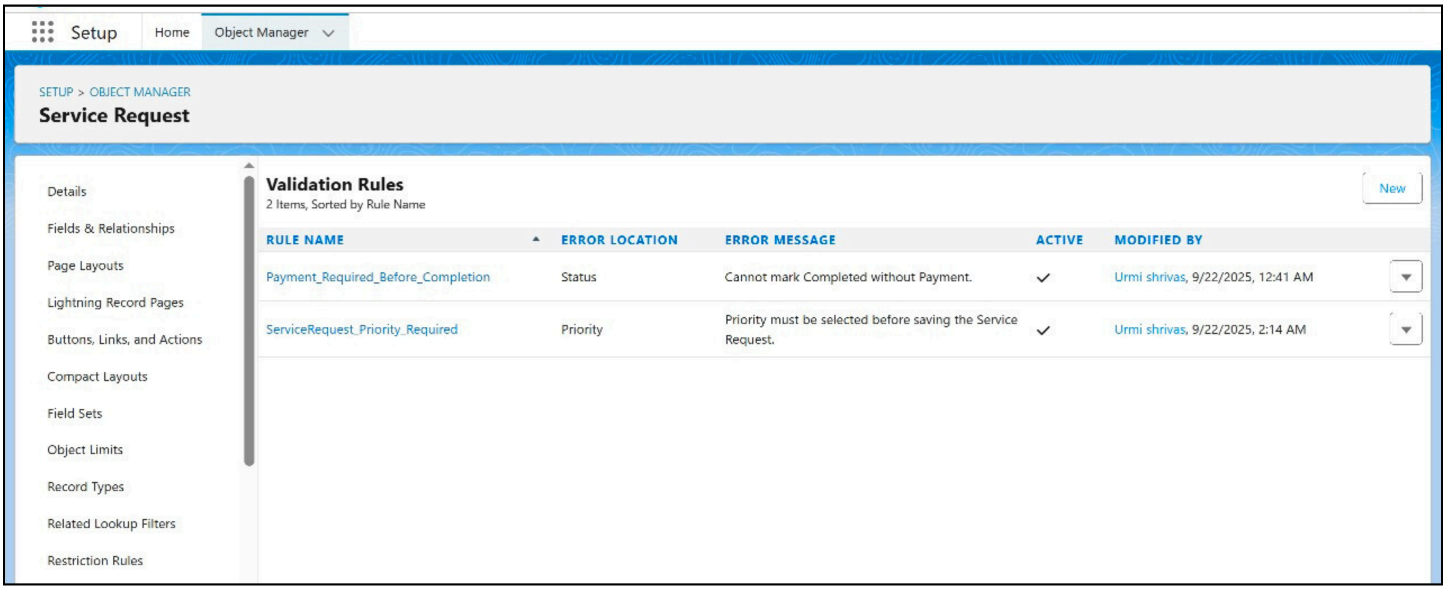
Service Request

- Mandatory fields validation (like Service Type, Customer Name).
- Restricted invalid data entry (e.g., date cannot be in the past).

Appointment

- Appointment Date must be greater than or equal to today.
- Prevented blank values in key fields (like Service Provider).





2. Workflow Rules

- No active workflow rules implemented in the project.
- Instead, Flows were used to automate processes as per Salesforce best practices.

3.Process Builder

- No active Process Builder implemented.
- Automation was handled using **Flows** (as Salesforce recommends migrating from Process Builder to Flows).

4· Approval Process

Implemented for **Payment Object** to validate payment requests.

Step 1: Service Provider submits payment for approval.

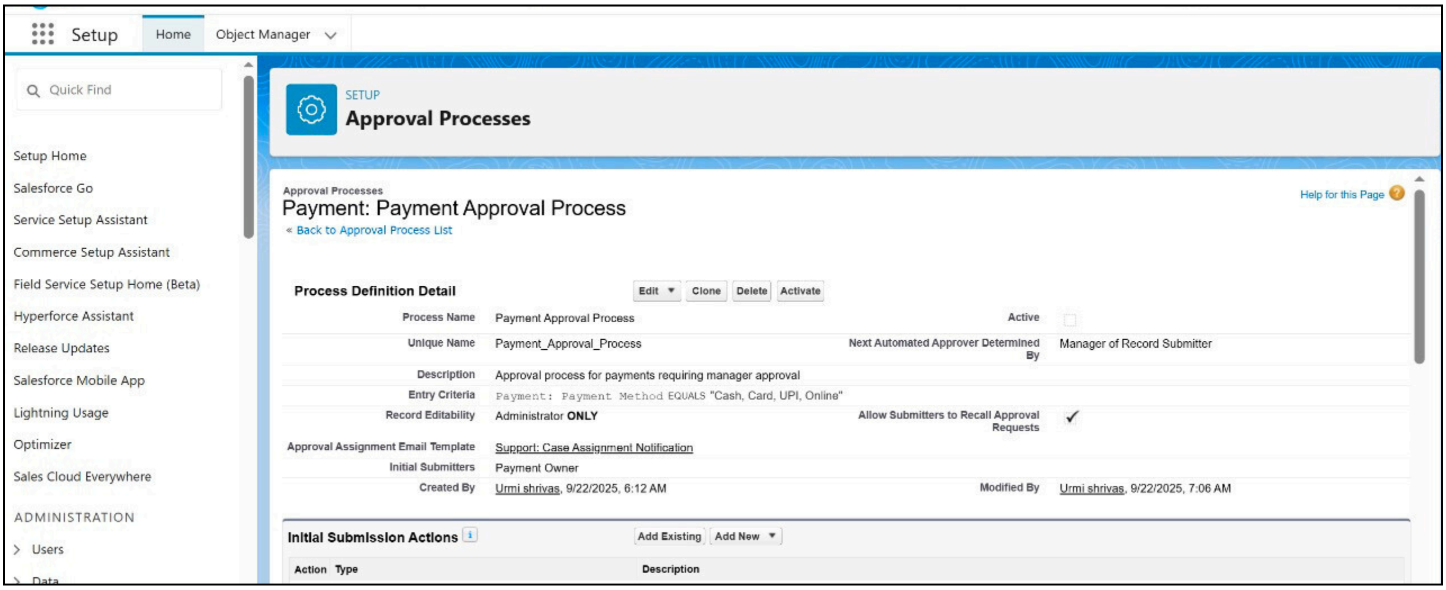
Step 2: Request goes to **Admin** for decision.

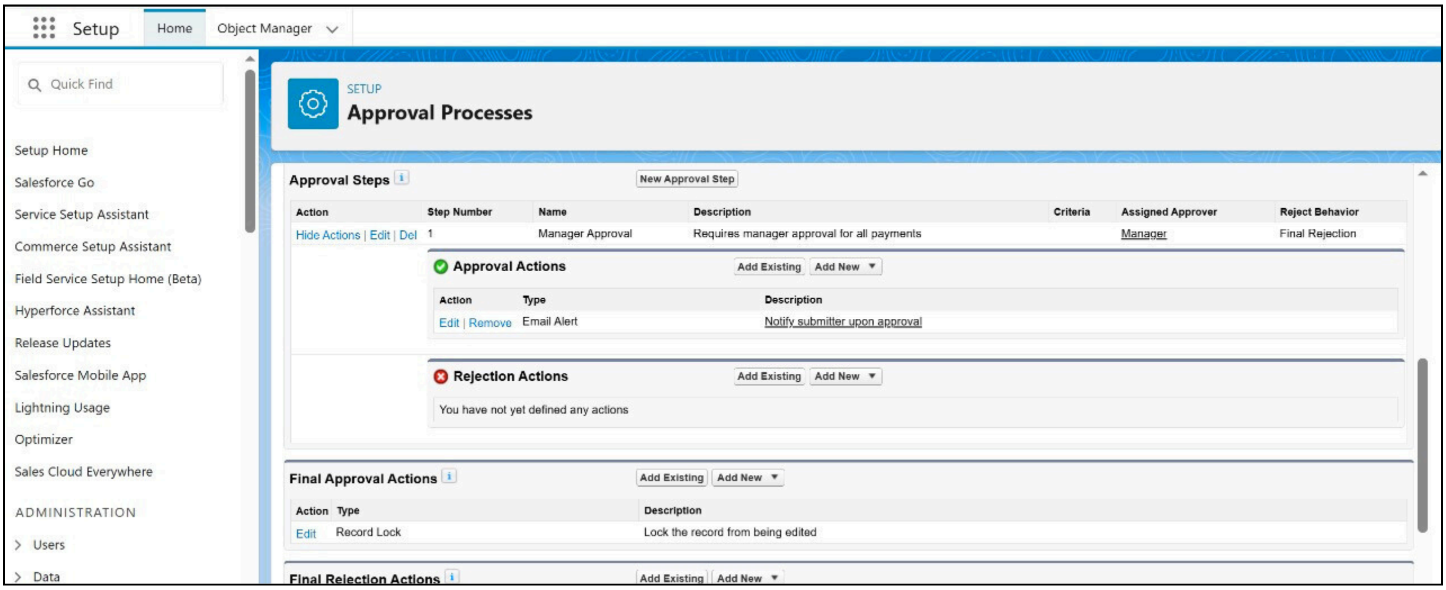
On Approval:

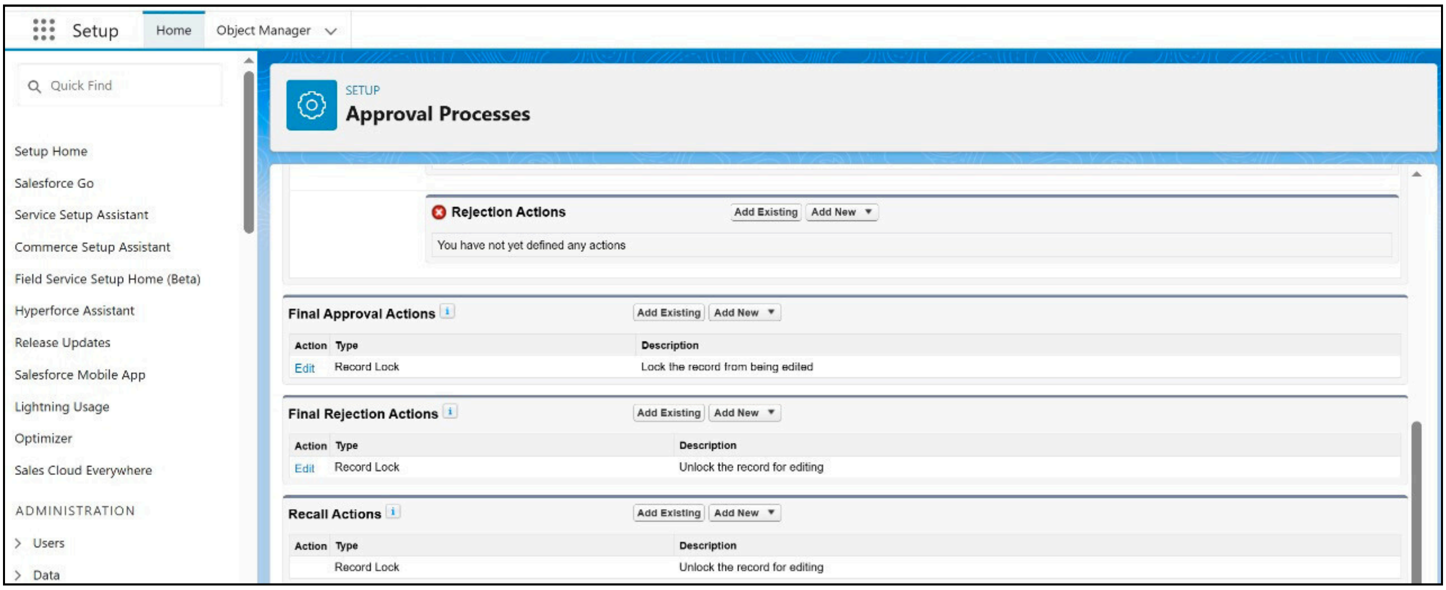
- Payment Status → “Approved”
- Record becomes eligible for further processing.

On Rejection:

- Payment Status → “Rejected”
- Service Provider notified to recheck or update payment details.


Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
SETUP
Approval Processes
Approval Processes
Payment: Payment Approval Process
« Back to Approval Process List
Help for this Page
Process Definition Detail
Edit
Clone
Delete
Activate
Process Name
Payment Approval Process
Active
Unique Name
Payment_Approval_Process
Next Automated Approver Determined By
Manager of Record Submitter
Description
Approval process for payments requiring manager approval
Entry Criteria
Payment: Payment Method EQUALS "Cash, Card, UPI, Online"
Record Editability
Administrator ONLY
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Support: Case Assignment Notification
Initial Submitters
Payment Owner
Created By
Urmi shrivas, 9/22/2025, 6:12 AM
Modified By
Urmi shrivas, 9/22/2025, 7:06 AM
Initial Submission Actions
Add Existing
Add New
Action
Type
Description

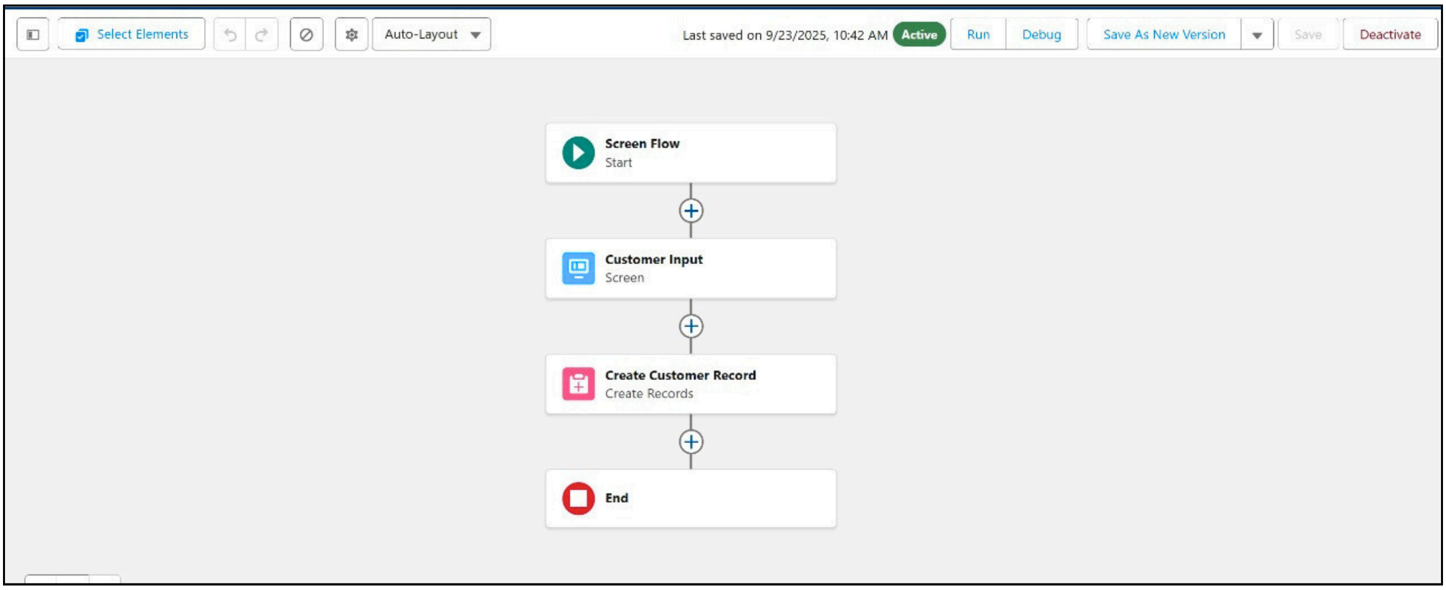

Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
SETUP
Approval Processes
Approval Steps
New Approval Step
Action
Step Number
Name
Description
Criteria
Assigned Approver
Reject Behavior
Hide Actions | Edit | Del
1
Manager Approval
Requires manager approval for all payments
Manager
Final Rejection
Approval Actions
Add Existing
Add New
Action
Type
Description
Edit | Remove
Email Alert
Notify submitter upon approval
Rejection Actions
Add Existing
Add New
You have not yet defined any actions
Final Approval Actions
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Lock the record from being edited
Final Rejection Actions
Add Existing
Add New


Setup
Home
Object Manager
Quick Find
Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
SETUP
Approval Processes
Rejection Actions
Add Existing
Add New
You have not yet defined any actions
Final Approval Actions
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Lock the record from being edited
Final Rejection Actions
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Unlock the record for editing
Recall Actions
Add Existing
Add New
Action
Type
Description
Record Lock
Unlock the record for editing

5· Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

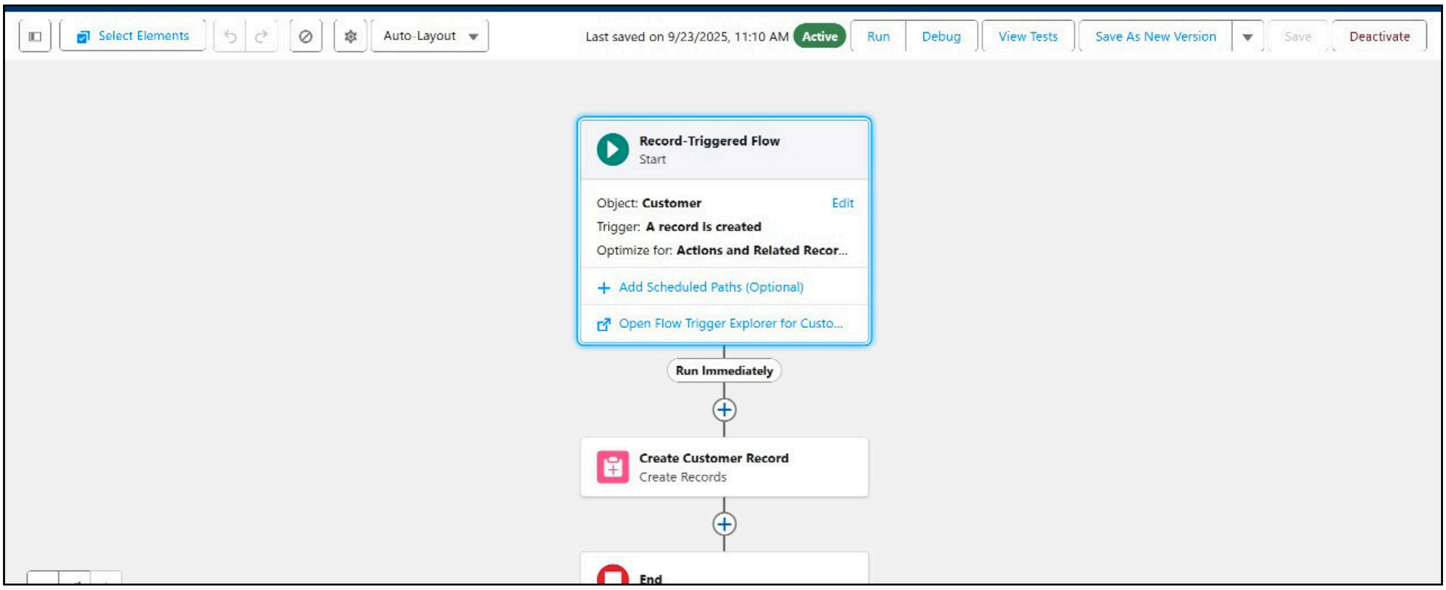
Screen Flow

- Created for **Appointment Booking**.
- User selects Service, Date, and Service Provider.
- Appointment record is created automatically in the system.



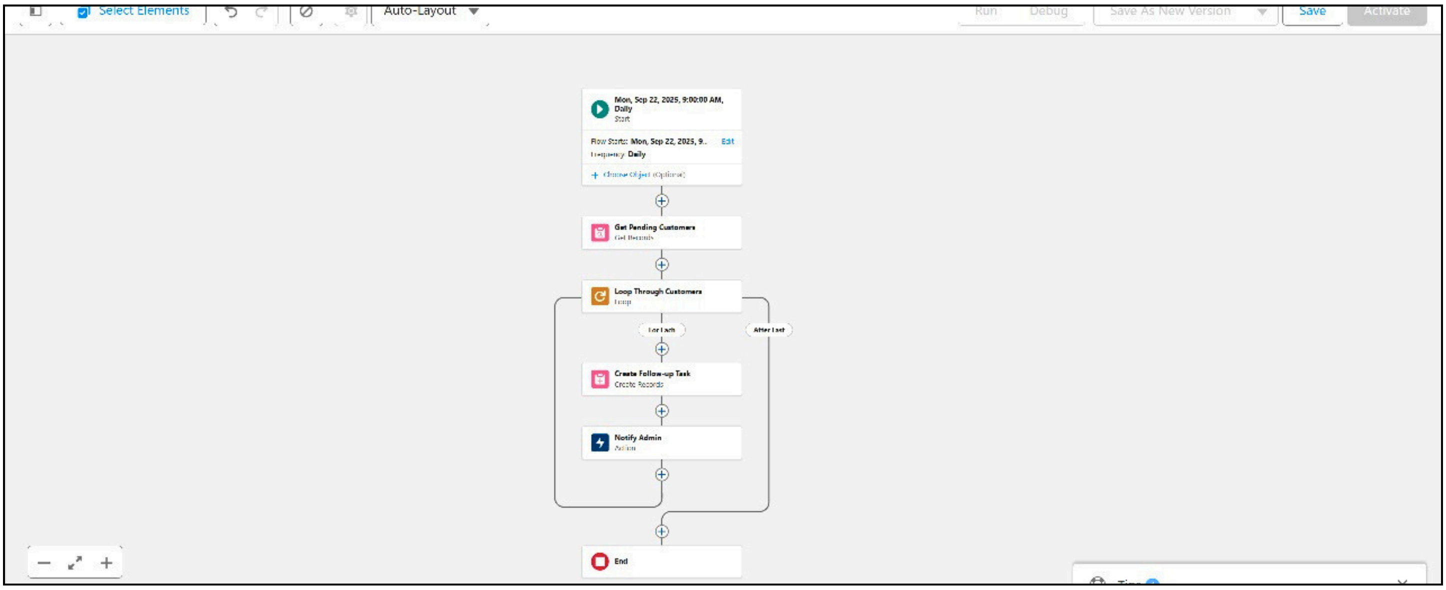
Record-Triggered Flow

- Created on **Service Request** object.
- When a new Service Request is created → Status is automatically set to “Pending”.
- When updated → Admin is notified.



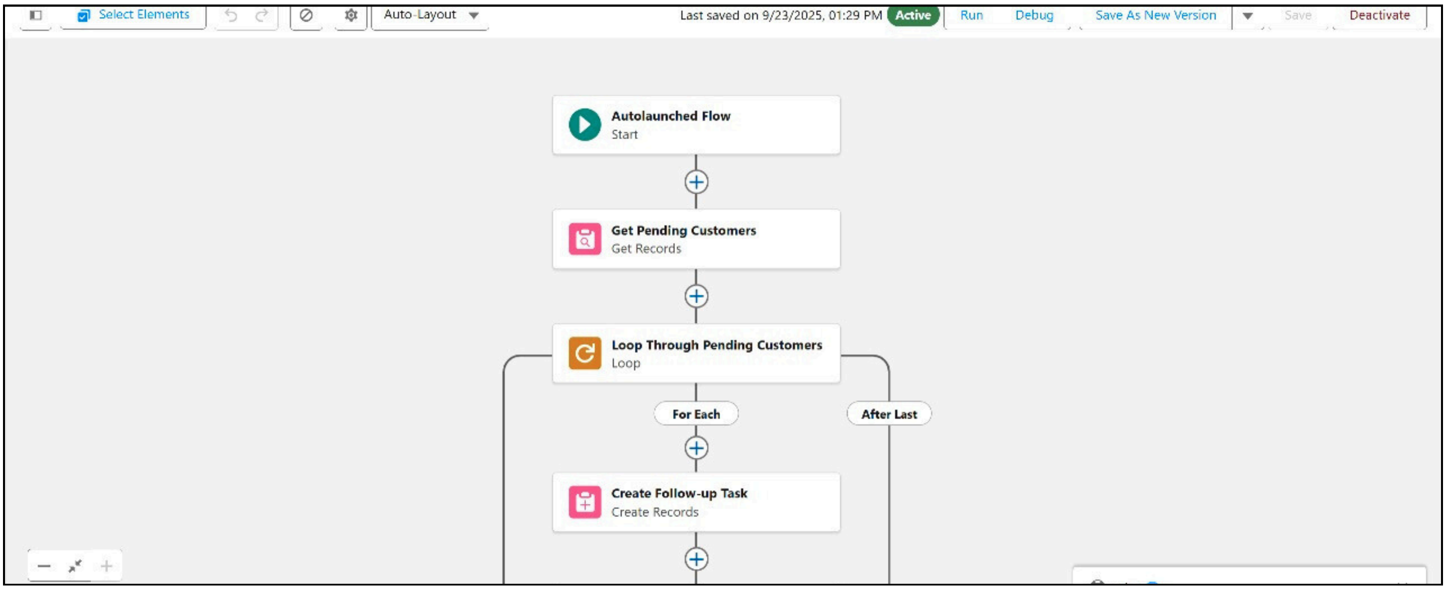
Scheduled Flow

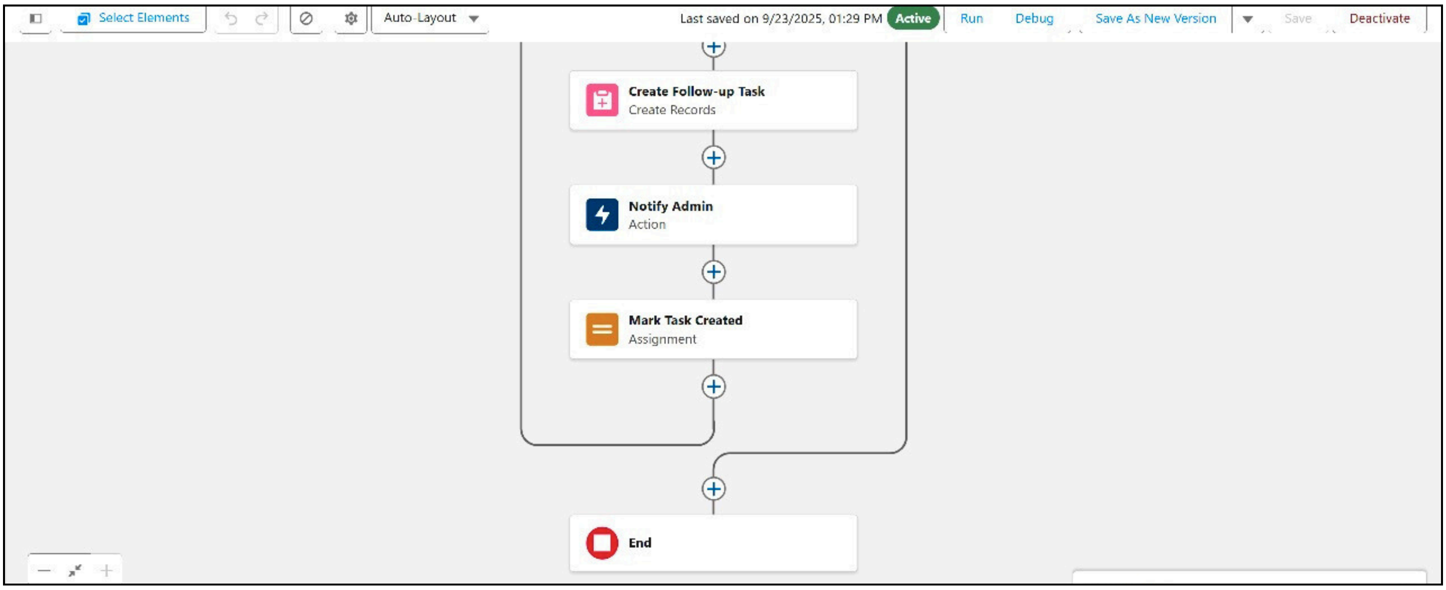
- Created for **Appointment Reminders**.
- Runs daily at a fixed time → Sends reminders before Appointment Date.



Auto-Launched Flow

- Created to handle **Payment Approval Automation**.
- Triggered automatically during the **Payment Approval Process**.
- Updates **Payment Status** field based on Admin decision:
- **Approved** → Status set to “Approved”
- **Rejected** → Status set to “Rejected”
- Ensures system automatically processes payment status without manual updates.





6· Email Alerts

Customer Follow-Up Notification

- Triggered when follow-up is required for a customer.
- Sends automated email to assigned user for action.

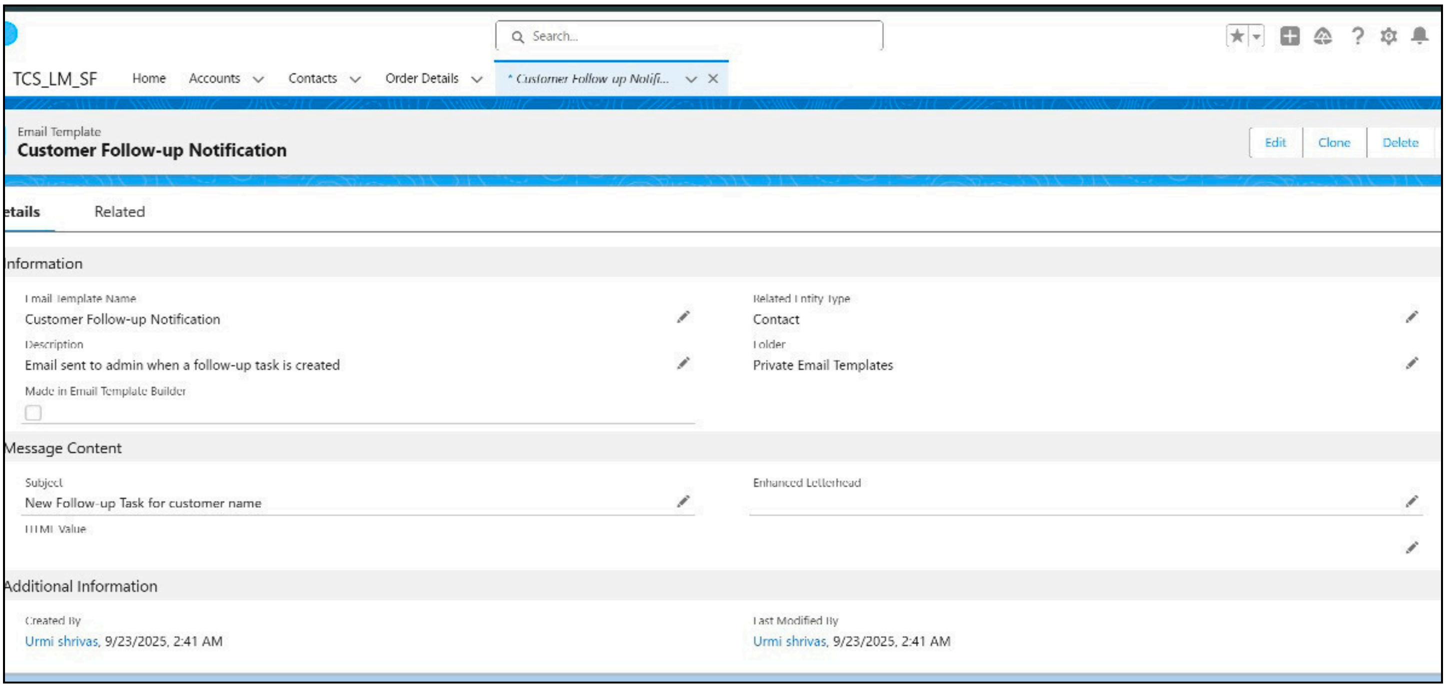
Customer Task Assigned Notification

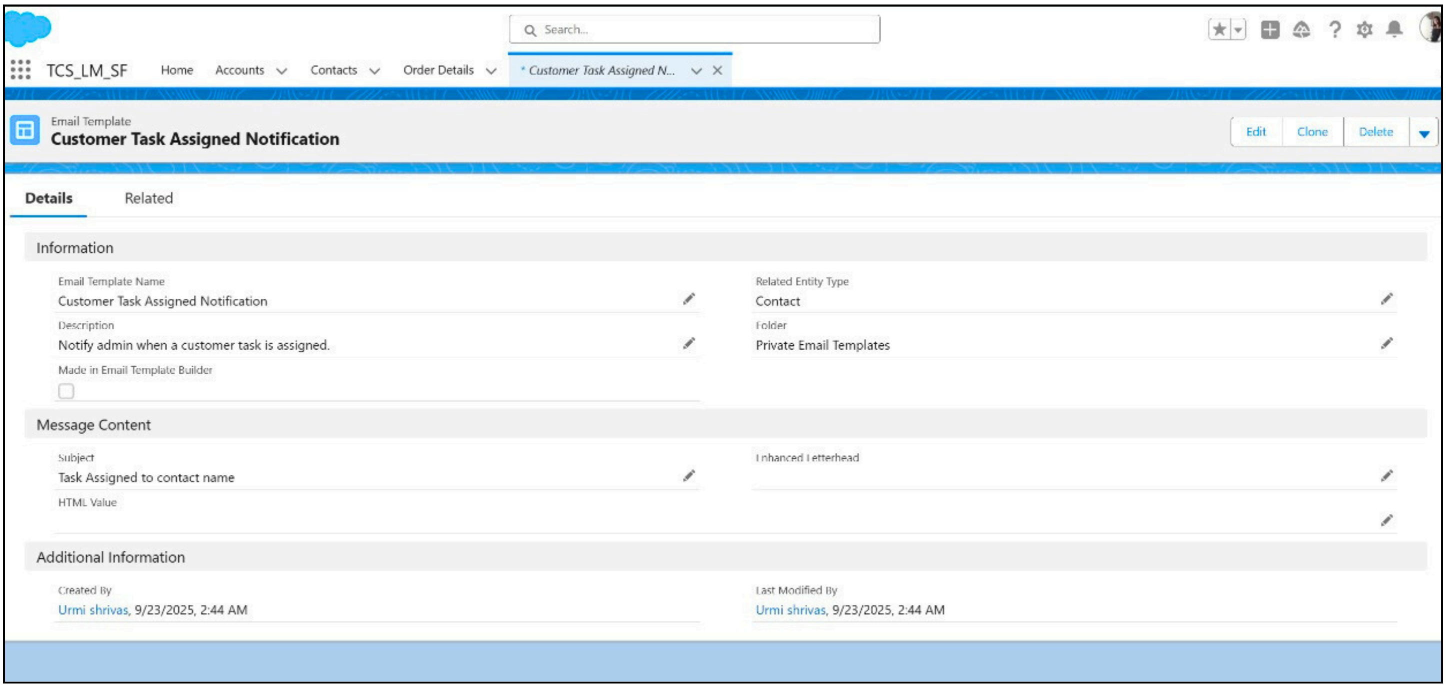
- Triggered when a new task is assigned to a user.
- Notifies the user via email with task details.

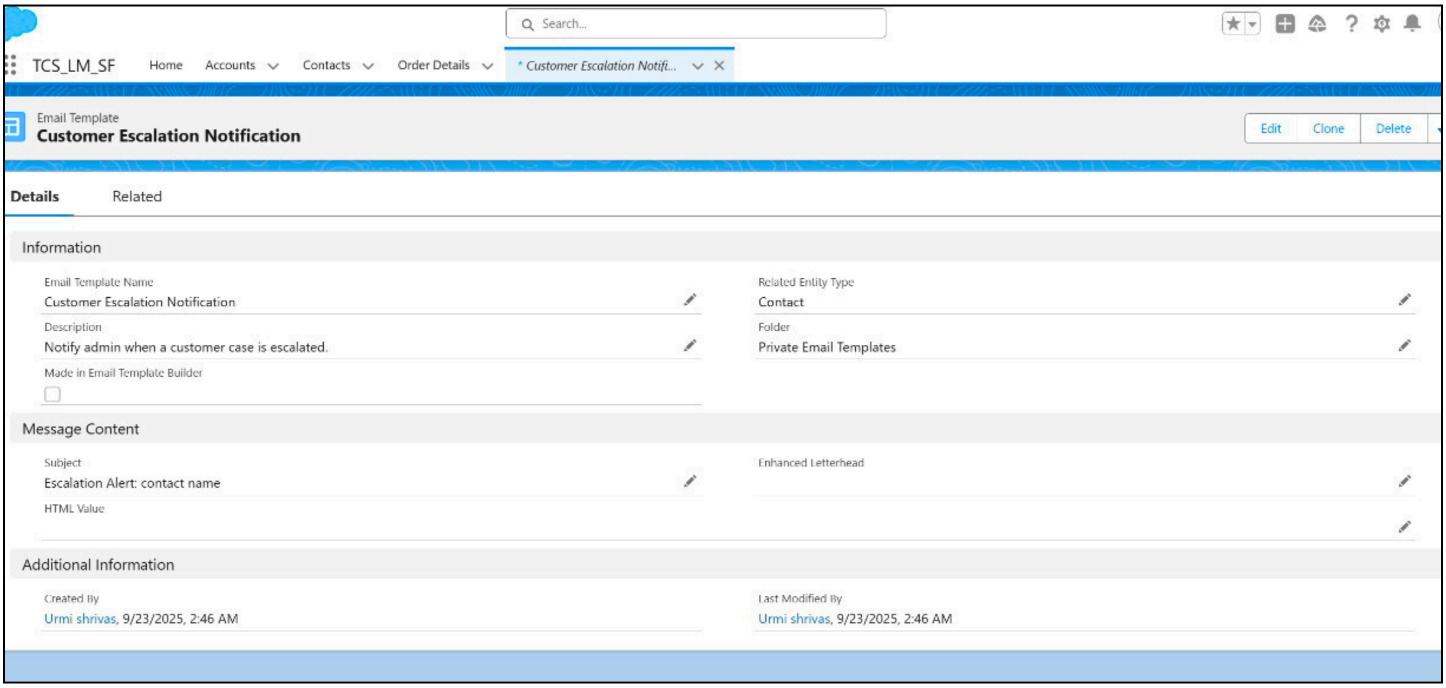
Customer Escalation Notification

- Triggered when a customer issue is escalated.
- Sends email to higher-level authority (Admin/Manager) for immediate attention.

All alerts automate communication, ensuring timely actions and follow-ups.

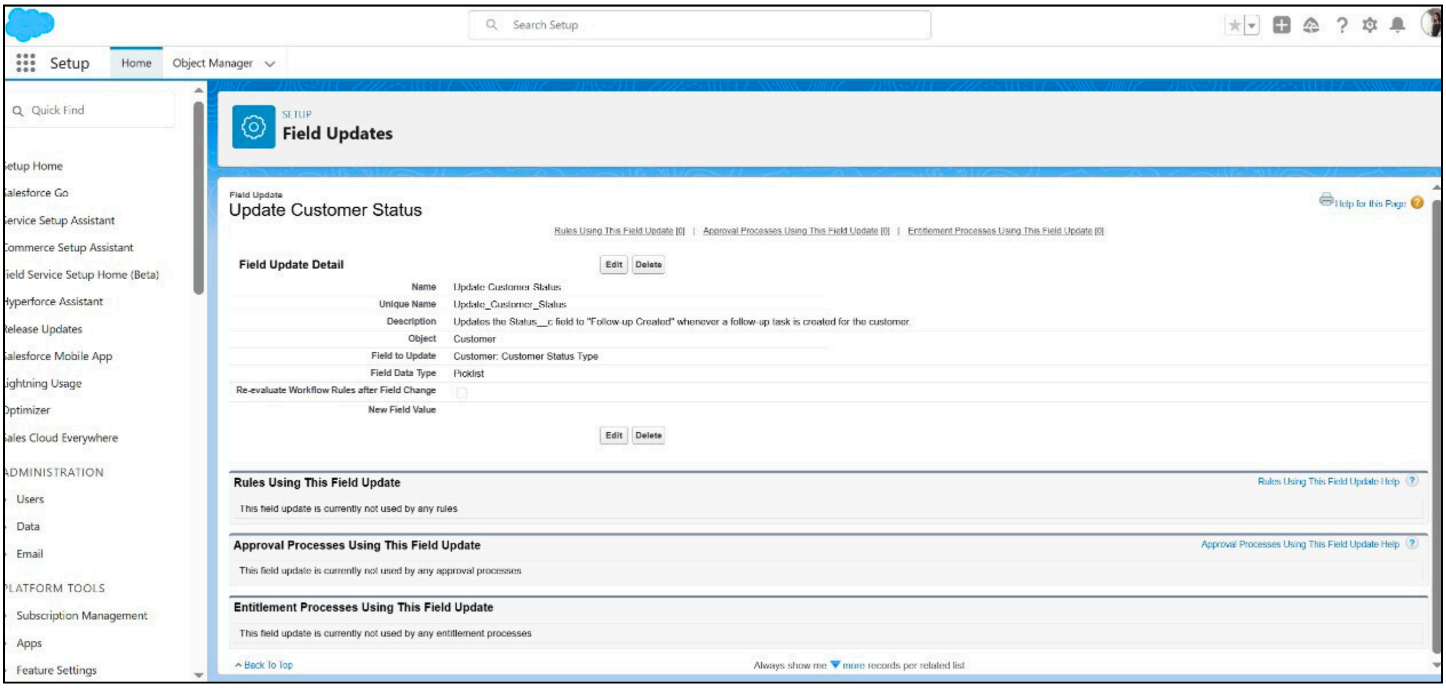

Search...
TCS_LM_SF
Home
Accounts
Contacts
Order Details
* Customer Follow up Notifi...
Email Template
Customer Follow-up Notification
Edit
Clone
Delete
etails
Related
nformation
Email Template Name
Customer Follow-up Notification
Related Entity Type
Contact
Description
Email sent to admin when a follow-up task is created
Folder
Private Email Templates
Made in Email Template Builder
Message Content
Subject
New Follow-up Task for customer name
Enhanced Letterhead
HTML Value
Additional Information
Created By
Urmi shrivas, 9/23/2025, 2:41 AM
Last Modified By
Urmi shrivas, 9/23/2025, 2:41 AM


Search...
TCS_LM_SF
Home
Accounts
Contacts
Order Details
* Customer Task Assigned N...
Email Template
Customer Task Assigned Notification
Edit
Clone
Delete
Details
Related
Information
Email Template Name
Customer Task Assigned Notification
Related Entity Type
Contact
Description
Notify admin when a customer task is assigned.
Folder
Private Email Templates
Made in Email Template Builder
Message Content
Subject
Task Assigned to contact name
Enhanced Letterhead
HTML Value
Additional Information
Created By
Urmi shrivas, 9/23/2025, 2:44 AM
Last Modified By
Urmi shrivas, 9/23/2025, 2:44 AM


Search...
TCS_LM_SF
Home
Accounts
Contacts
Order Details
* Customer Escalation Notifi...
Email Template
Customer Escalation Notification
Edit
Clone
Delete
Details
Related
Information
Email Template Name
Customer Escalation Notification
Related Entity Type
Contact
Description
Notify admin when a customer case is escalated.
Folder
Private Email Templates
Made in Email Template Builder
Message Content
Subject
Escalation Alert: contact name
Enhanced Letterhead
HTML Value
Additional Information
Created By
Urmi shrivas, 9/23/2025, 2:46 AM
Last Modified By
Urmi shrivas, 9/23/2025, 2:46 AM

7. Field updates

- **Customer Status Update**
- Implemented to automatically update **Customer Status** based on actions in the system.
- Example:
  - When Service Request is completed → Customer Status changes to “Service Completed”.
  - During Payment Approval → Customer Status updates to “Payment Approved” or “Payment Rejected”.
- Ensures data consistency and reduces manual updates.

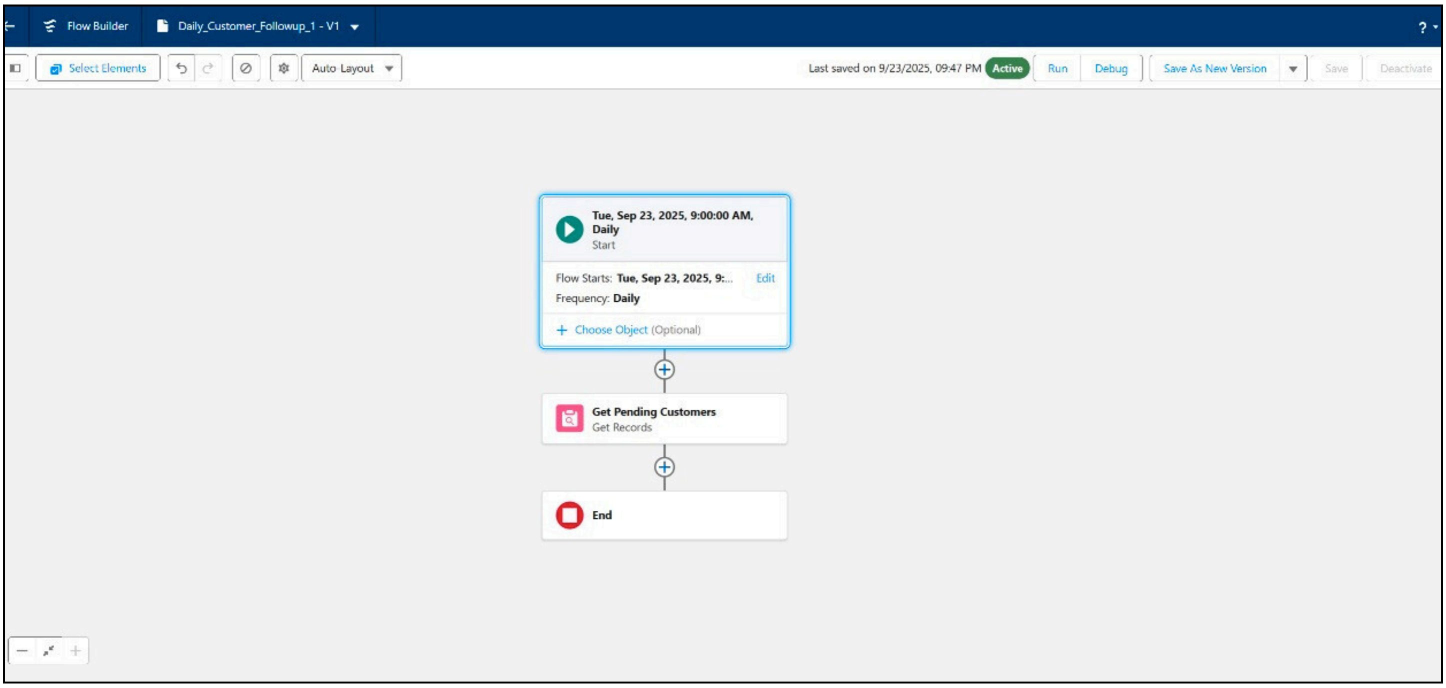


---

8. Task

Scheduled Tasks for Appointments

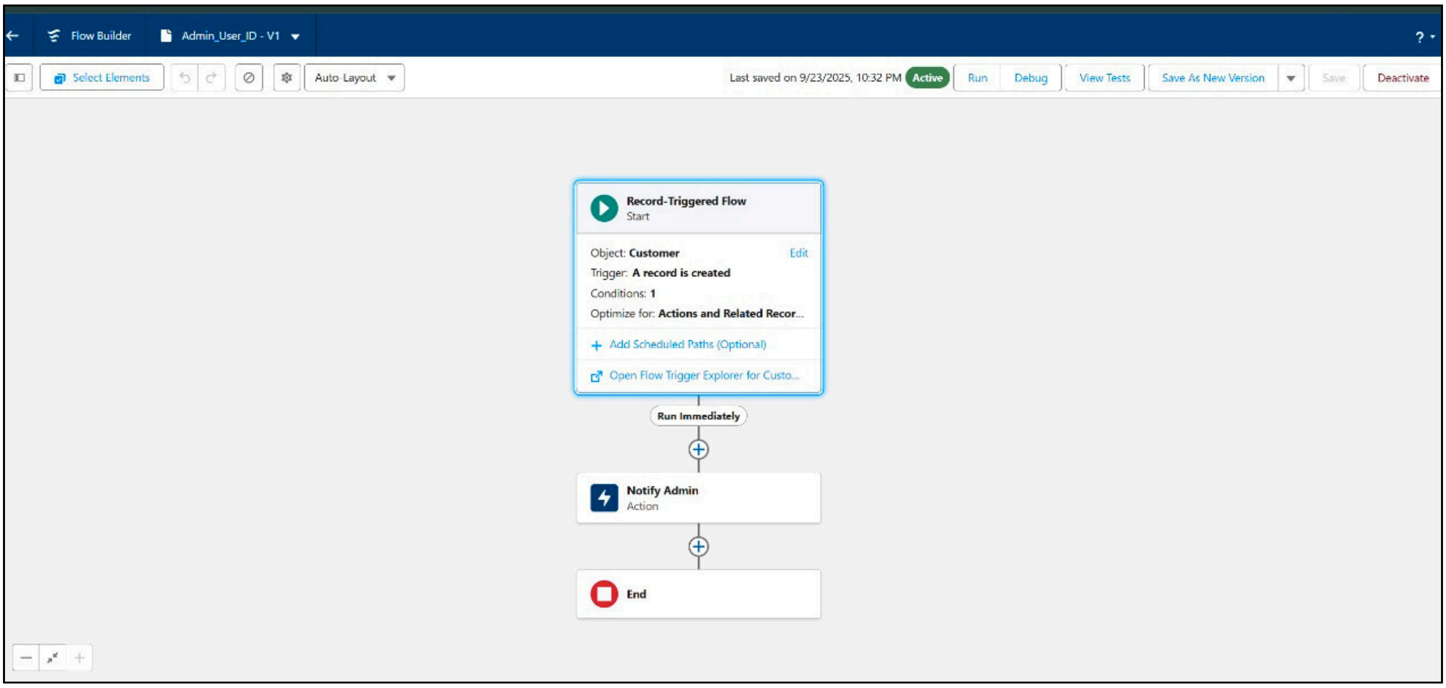
- Created tasks using **Scheduled Flow** to remind users about upcoming appointments.
- Tasks automatically generated daily before the Appointment Date.
- Assigned to respective users to ensure timely follow-up.
- Reduces missed appointments and improves customer service.



---

9. Custom notifications

- Implemented using **Record-Triggered Flow**.
- **Customer Service Notifications**:
- Triggered when a new **Service Request** is created or updated.
- Notifies assigned user immediately about new or updated records.
- Helps users stay informed in real-time without checking the records manually.
- Improves task management and response time for customer requests.


Flow Builder
Admin_User_ID - V1
Select Elements
Auto Layout
Last saved on 9/23/2025, 10:32 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Object: Customer
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Custo...
Run Immediately
Notify Admin
Action
End