

Carbon Footprint Tracker

Phase 4: Process Automation (Admin)

1. Validation Rules

Objective: To maintain high data quality by preventing the saving of invalid data.

Path: Setup → Object Manager → Carbon_Emission__c → Validation Rules

- **Rule Name:** Amount_Must_Be_Positive
- **Error Condition:** Amount__c <= 0
- **Error Message:** "Carbon Emission Amount must be greater than zero."

Validation Rules					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Emission_Date_Not_Future	Top of Page	Emission date cannot be in the future.	✓	Vraddhi Valecha, 9/18/2025, 10:10 AM	
Positive_Emission_Amount	Top of Page	Emission Amount must be greater than 0.	✓	Vraddhi Valecha, 9/18/2025, 10:08 AM	

2. Workflow Rules (Legacy Tool)

Objective: To document the use of legacy automation (Note: Flow Builder is the recommended tool for new automation).

Path: Setup → Workflow Rules

- **Status:** No active Workflow Rules created. All new automation is built in Flow Builder.

All Workflow Rules					
Help for this Page					
<p> Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. Tell Me More Migrate your workflow rules to flows</p>					
<p>Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:</p>					
Action	Rule Name ↑	Description	Object	Active	
Edit Del Activate	High_Emission_Alert	Trigger alerts when emission amount > 1000	Carbon Emission	<input type="checkbox"/>	

3. Process Builder (Legacy Tool)

Objective: To document the use of Process Builder (Note: Being superseded by Flow Builder).

Path: Setup → Process Builder

- **Status:** No active Processes built. Flow Builder is the preferred tool for complex automation.

4. Approval Process

Objective: To automate the review and approval process for high-value carbon emissions.

Path: Setup → Approval Processes

- **Process Name:** High Value Vendor Request Approval
- **Object:** Carbon_Emission__c
- **Entry Criteria:** Amount__c greater than 1000
- **Approver:** Assigned to a specific user (e.g., VP of Procurement).
- **Final Approval Actions:**
 1. **Field Update:** Set Status to Approved
 2. **Task:** Onboard Approved Vendor

The screenshot shows the 'Approval Processes' page in the Salesforce Setup. At the top, there's a sidebar with a gear icon labeled 'SETUP'. Below it, the page title 'Approval Processes' is displayed. A sidebar on the left lists three features: 'Apex Extensibility', 'Detailed Logging', and 'Dynamic Routing'. A large blue button at the bottom of this sidebar says 'Open Approvals App'. To the right of the sidebar, there's a yellow callout box containing 7 steps for starting an approval process. The main content area has a heading 'Manage Approval Processes For: Carbon Emission'. Below this, a message states that a listing of both active and inactive approval processes for Carbon Emissions is displayed. A 'Create New Approval Process' button is available. The 'Active Approval Processes' section shows a table with one row:

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	High Value Vendor Request Approval	

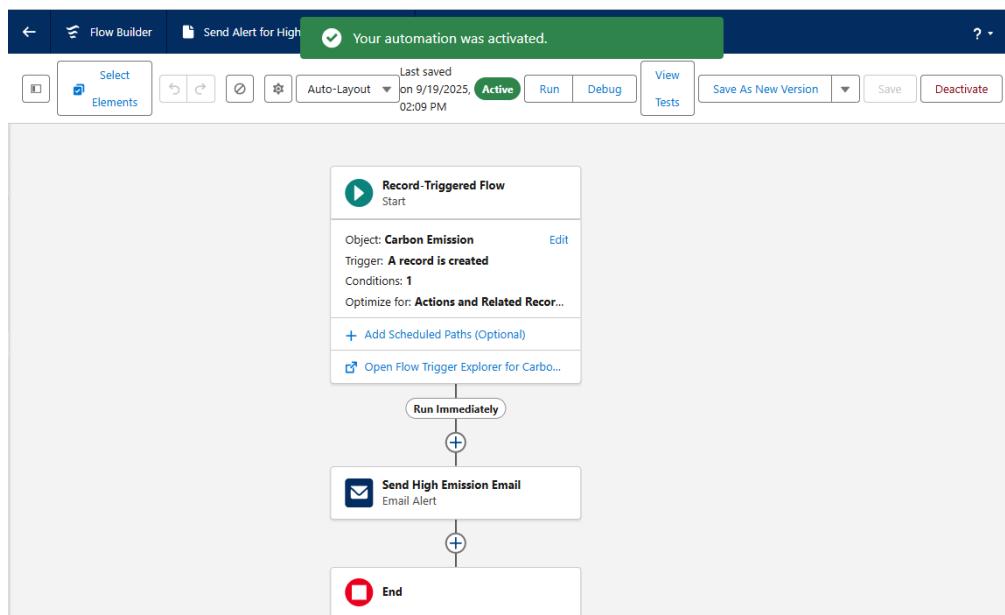
5. Flow Builder

Objective: To build powerful, modern automations for record-triggered, screen, and scheduled processes.

Path: Setup → Flows

- **Flow Types in Use:**

- **Record-Triggered Flow:** (Planned) To auto-submit records meeting criteria into the approval process.
- **Screen Flow:** (Planned) To create a guided wizard for users to report emissions.



6. Email Alerts

Objective: To send automated email notifications as part of approval and other processes.

Path: Setup → Email Alerts

- **Alert Name:** High_Emission_Alert
- **Purpose:** Email template used to notify the assigned approver in the High Value Vendor Request Approval process.

The screenshot shows the "Email Alerts" setup page under the "SETUP" tab. The title is "Email Alerts". On the right, there's a "Help for this Page" link with a question mark icon. The main area is titled "All Email Alerts". A sub-header states: "Email alerts are used to send emails from a flow or other automation." Below this are buttons for "View: All Email Alerts" and "Create New View". A navigation bar at the bottom includes links for letters A-Z and "Other".

A table lists the existing email alert. The columns are: Action, Description, Email Template Name, Object, and Last Modified Date. One entry is shown:

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Send_email_alert_to_Admin_when_Carbon_Emission > 1000	High_Emission_Alert	Carbon Emission	9/18/2025

At the very bottom, another navigation bar includes letters A-Z and "Other".

7. Field Updates

Objective: To automatically update a field on a record as part of an automated process.

Path: Setup → Approval Processes → Field Updates

- **Update Name:** Set Status to Approved
- **Object:** Carbon_Emission__c
- **Field:** Status__c
- **New Value:** Approved

The screenshot shows the 'Field Update' page in the Salesforce setup. The title is 'Set Status to Approved'. The 'Field Update Detail' section shows the following configuration:

Name	Set Status to Approved
Unique Name	Set_Status_to_Approved
Description	Carbon Emission
Object	Carbon Emission
Field to Update	Carbon Emission: Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Approved

Below the detail section are 'Edit' and 'Delete' buttons. The page also includes sections for 'Rules Using This Field Update', 'Approval Processes Using This Field Update', and 'Entitlement Processes Using This Field Update', each with their respective help links and status messages.

8. Tasks

Objective: To automatically create follow-up tasks for users upon completion of a process.

Path: Setup → Approval Processes → Tasks

- **Task Name:** Onboard Approved Vendor
- **Subject:** Onboard Approved Vendor
- **Assigned To:** Procurement Manager Role
- **Description:** "This high-value vendor has been approved. Please begin the onboarding process."

 SETUP

Approval Processes

Carbon Emission: High Value Vendor Request Approval

[Help for this Page](#)

[Back to Approval Process List](#)

Process Definition Detail

Process Name		High Value Vendor Request Approval	Active	<input checked="" type="checkbox"/>
Unique Name	High_Value_Vendor_Request_Approval	Next Automated Approver Determined By		
Description				
Entry Criteria	Carbon Emission: Amount (CO ₂ e) GREATER THAN 1000			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>	
Approval Assignment Email Template	High_Emission_Alert			
Initial Submitters	Emission Source Owner			
Created By	Vraddhi Valecha	9/19/2025, 6:01 AM	Modified By	Vraddhi Valecha, 9/19/2025, 6:36 AM

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	VP of Procurement Review			User:Vraddhi Valecha	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Set Status to Approved