

Phase 4

Salesforce Automation & Configuration Report – FoodieConnect Pvt. Ltd.

Validation Rules

Purpose: Ensure data integrity by preventing invalid records from being saved.

Implemented Rules:

- **Order_Total_Positive**

- **Object:** Order
- **Formula:** Total_Amount__c <= 0
- **Error Message:** "Order Total Amount must be greater than 0."
- **Status:** Active 

Order Validation Rule

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Validation Rule Detail

Rule Name	Order_Total_Positive	Active	
Error Condition Formula	Total_Amount__c <= 0		
Error Message	Order Total Amount must be greater than 0	Error Location	Total Amount
Description			
Created By	mudhuluri lakshminarayananarma , 14/09/2025, 5:39 pm	Modified By	mudhuluri lakshminarayananarma , 14/09/2025, 5:39 pm

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✓

Payment Validation Rule

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Validation Rule Detail

Rule Name	Payment_Amount_Positive	Active	
Error Condition Formula	Amount__c <= 0		
Error Message	Payment amount must be greater than zero.	Error Location	Amount
Description			
Created By	mudhuluri lakshminarayananarma , 19/09/2025, 4:55 pm	Modified By	mudhuluri lakshminarayananarma , 19/09/2025, 4:55 pm

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Menu Item Validation Rule

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Validation Rule Detail

Rule Name	MenuItem_Price_Positive	Active	
Error Condition Formula	Price__c < 0		
Error Message	Menu Item Price cannot be negative	Error Location	Price
Description			
Created By	mudhuluri lakshminarayananarma , 14/09/2025, 5:42 pm	Modified By	mudhuluri lakshminarayananarma , 14/09/2025, 5:42 pm

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Outcome: Users cannot create Orders with zero or negative amounts, maintaining accurate financial data.

Email Alerts

Purpose: Automatically notify customers when key actions occur.

Implemented Alerts:

- **Payment Received Email Alert**
 - **Object:** Payment
 - **Email Template:** Payment Received - Customer
 - **Recipients:** Customer email (configured for testing to owner email)

The screenshot displays two pages from the Salesforce Setup interface:

- Email Alerts**: Shows a single alert configuration for "Send email to customer when payment is received". The alert details include:
 - Description: Send email to customer when payment is received
 - Unique Name: Send_email_to_customer_when_payment_is_received
 - From Email Address: Current User's email address
 - Recipients: User_mudhuluri.lakshminarayana@gmail.com
 - Additional Emails: mudhuluri.lakshminarayana@gmail.com, 19/09/2025, 4:22 pm
 - Email Template: Payment Received - Customer
 - Object: Payment
 - Modified By: mudhuluri.lakshminarayana@gmail.com, 19/09/2025, 4:22 pm
- Classic Email Templates**: Shows a template named "Payment Received - Customer". The template details include:
 - Email Template Name: Payment Received - Customer
 - Template Unique Name: Payment_Received_Customer
 - Encoding: Unicode (UTF-8)
 - Author: mudhuluri.lakshminarayana@gmail.com [Change]
 - Description: Sends a confirmation email to customer when payment is received.
 - Created By: mudhuluri.lakshminarayana@gmail.com, 19/09/2025, 4:17 pm
 - Available For Use: ✓
 - Last Used Date: Times Used
 - Modified By: mudhuluri.lakshminarayana@gmail.com, 19/09/2025, 4:17 pm

The "Email Template" section shows the template content with merge fields and preview text:

```
Subject: Your Payment #:{Payment.Payment_Number__c} for Order #:{Payment.Order__c} has been received
Hello {!NullValue(Payment.Order__r,"Sir or Madam")}.
We have successfully received your payment.
Payment Details:
- Payment Number: {Payment.Payment_Number__c}
- Order Number: {Payment.Order__c}
- Amount: {Payment.Amount__c}
- Payment Method: {Payment.Payment_Method__c}
- Payment Date: {Payment.Payment_Date__c}

Thank you for choosing FoodieConnect!
We're excited to continue serving you.
Best regards,
FoodieConnect Support Team
```

Outcome: Customers receive timely confirmation when a payment is received.

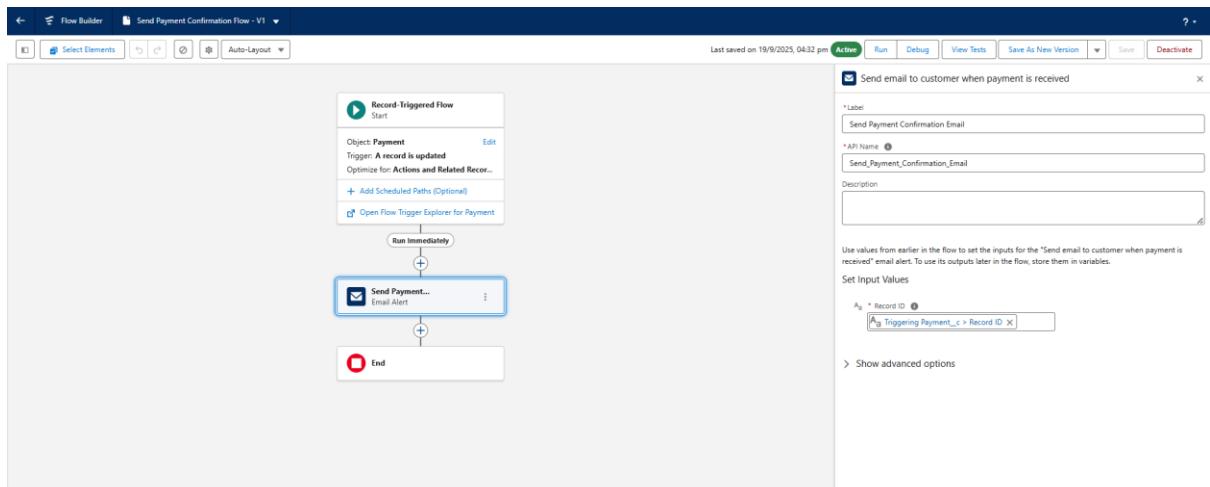
Flow Builder (Record-Triggered Flows)

Purpose: Automate actions based on record changes.

Implemented Flows:

- **Payment Confirmation Flow**

- Triggered when a **Payment** record is created.
- Automatically sends the **Payment Received Email Alert**.



Field Updates via Flow:

- Updating **Order Status** after Payment creation to reduce manual work.

Outcome: Automation is live; emails and record updates occur without manual intervention.

Approval Process

Purpose: Require manager approval for Payments.

Implemented Process:

- **Payment Approval Process**
 - **Object:** Payment
 - **Approver:** Operations Manager (automatically assigned)
 - **Email Notifications:** Sent to approver when a Payment needs approval and to submitter when approved/rejected.
 - **Submit for Approval Button:** Added to Payment page layout
 - **Status:** Active

The screenshot shows the Approval Processes page in Salesforce. At the top, there's a header with a gear icon labeled "SETUP" and the title "Approval Processes". Below the header, the specific process is identified as "Payment: Payment_Approval" with a link to "Back to Approval Process List".

Process Definition Detail

Process Name	Payment_Approval	Active	<input type="checkbox"/>
Unique Name	Payment_Approval	Next Automated Approver Determined By	<input type="checkbox"/>
Description			
Entry Criteria	Payment : Amount GREATER THAN 1000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Payment Owner	Modified By	mudhuluri lakshminarayana varma 19/09/2025, 5:06 pm
Created By	mudhuluri lakshminarayana varma 19/09/2025, 5:06 pm		

Initial Submission Actions

Action Type	Description
Record Lock	Lock the record from being edited

Outcome: Payments are automatically routed for approval before processing.

Custom Notifications

Purpose: Send in-app notifications to Salesforce users.

Implemented Notifications:

- **Delivery_Assigned Notification**
 - **Object:** Delivery
 - **Trigger:** Record-Triggered Flow on creation
 - **Recipient:** Assigned Rider
 - **Title:** "New Delivery Assigned"
 - **Body:** "You have a new delivery for Order {!Delivery.Order__r.Order_Number__c}"
 - **Status:** Active

The screenshot shows the Custom Notifications page in Salesforce. At the top, there's a header with a gear icon labeled "SETUP" and the title "Custom Notifications".

Custom Notification Types

Send custom notifications using [Flows](#) or [Process Builder](#).

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Delivery_Assigned	Delivery_Assigned		✓	✓

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Messaging or Apple Push Notification Service.