Phase 4: Process Automation (Admin)

This phase covers automating business processes in Salesforce using admin tools like Validation Rules, Workflow Rules, Process Builder, Flow Builder, and more.

1️⃣Validation Rules

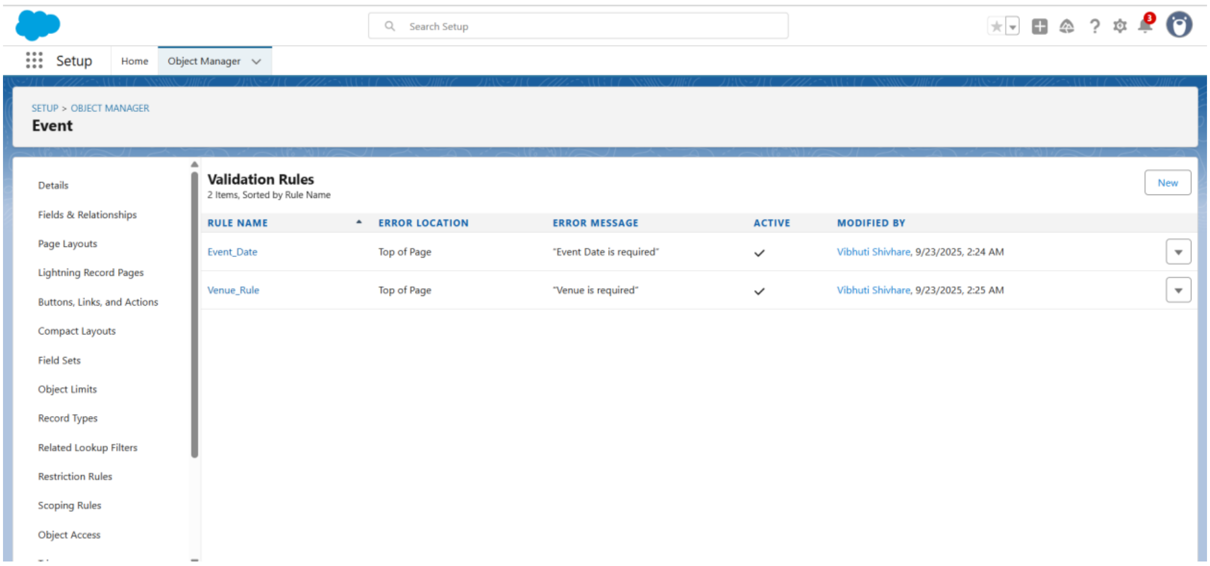
Purpose: Ensure data integrity by enforcing specific criteria before a record is saved.

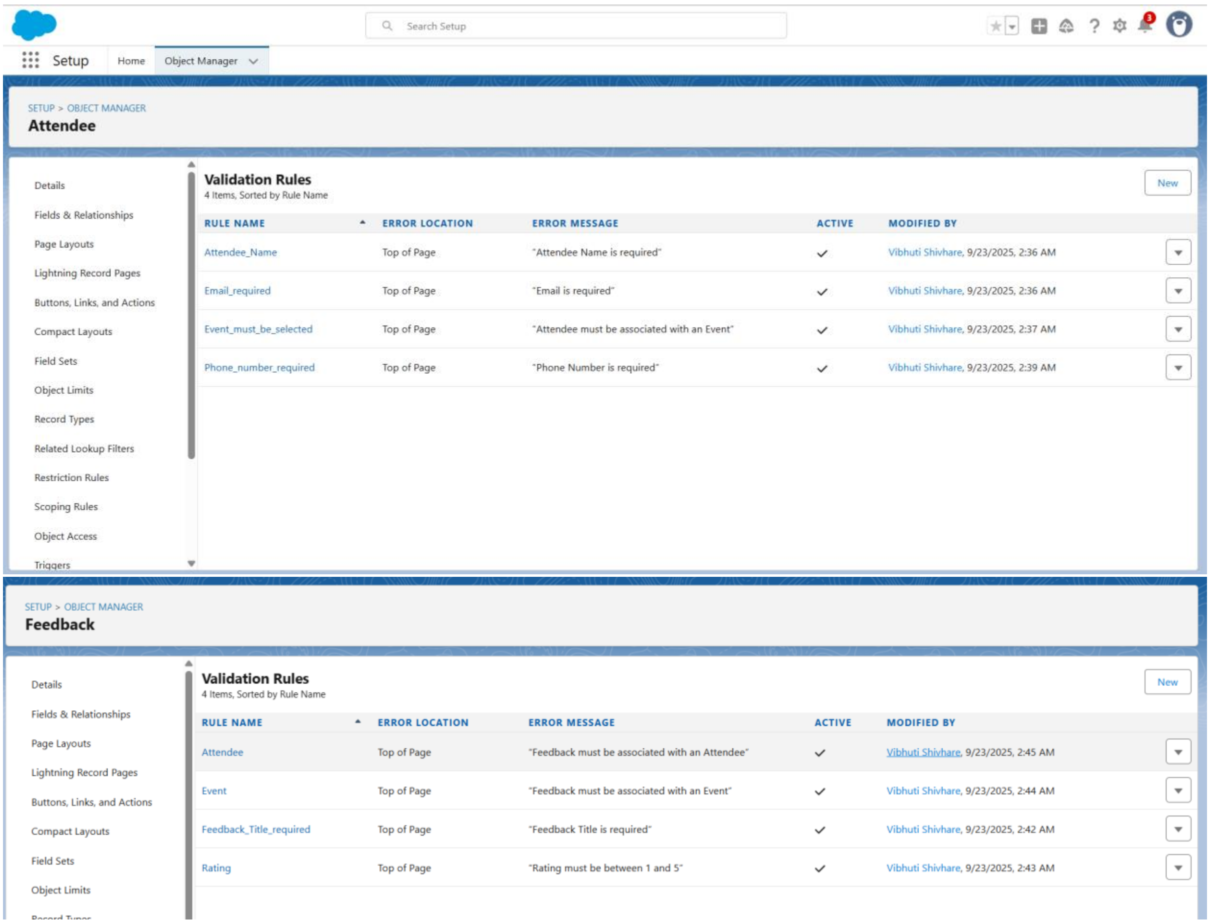
Key Points:

- Use formulas to define conditions.
- Display error messages when validation fails.
- Example: Ensure End_Date__c is after Start_Date__c.

Steps to Create:

1. Go to **Setup → Object Manager → [Object] → Validation Rules**.
2. Click **New**.
3. Enter **Rule Name** and **Description**.
4. Define the **Error Condition Formula**.
5. Enter **Error Message** and location (field-level or top of page).
6. Save and activate.





2 Workflow Rules

Purpose: Automate standard internal processes like sending emails, updating fields, or creating tasks based on record criteria.

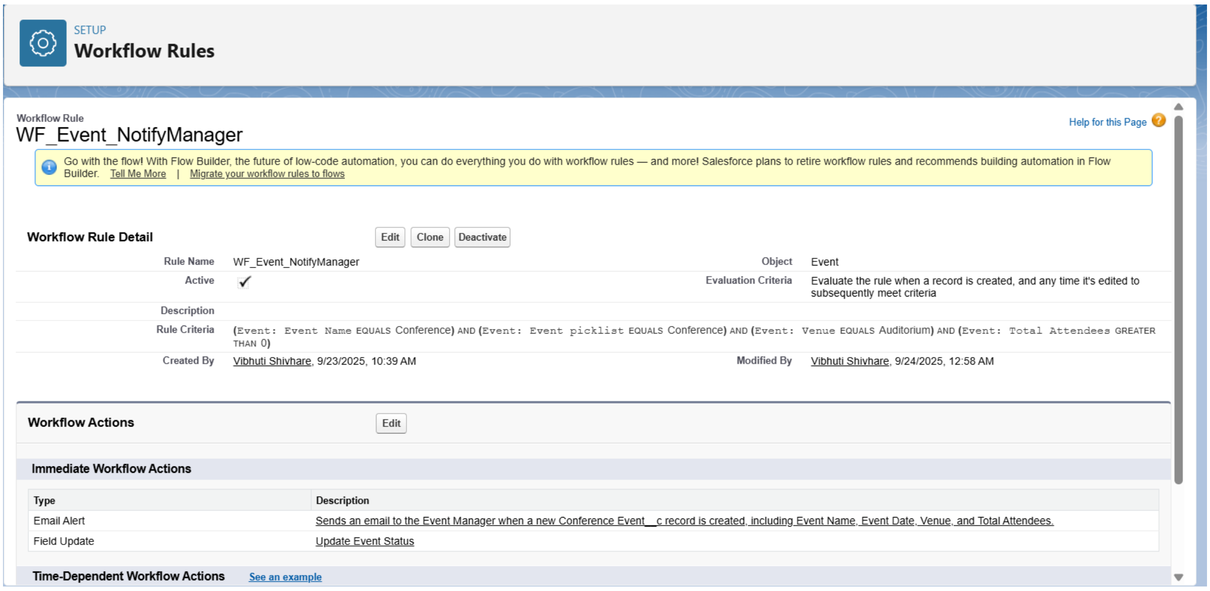
Components:

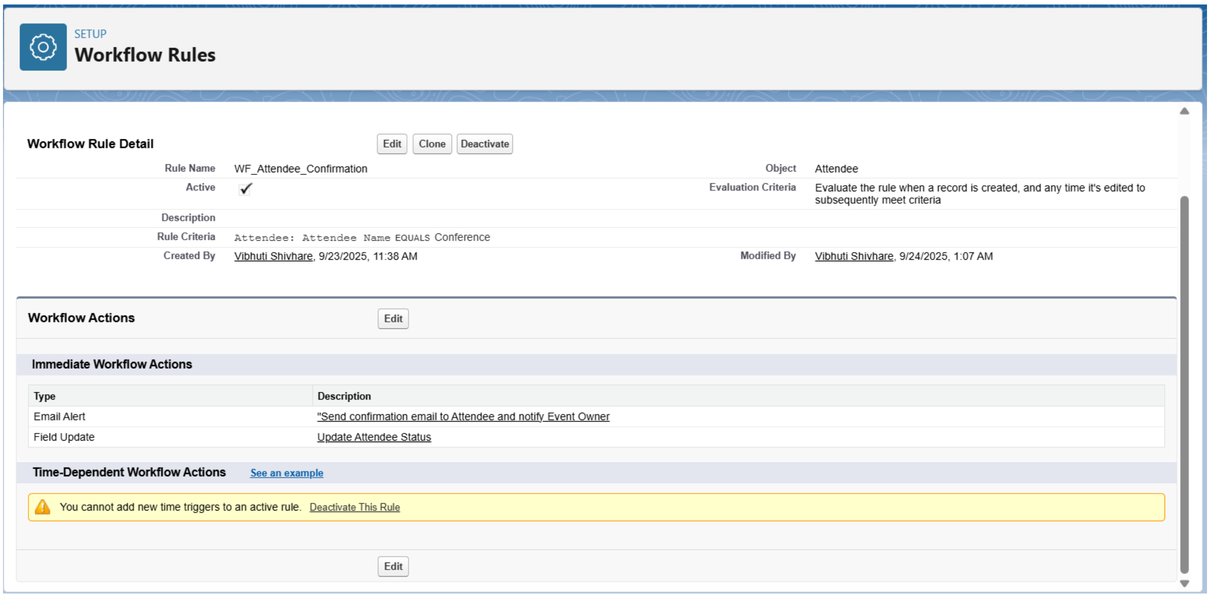
- **Rule Criteria:** When the workflow triggers.
- **Workflow Actions:** Email Alerts, Field Updates, Tasks, Outbound Messages.

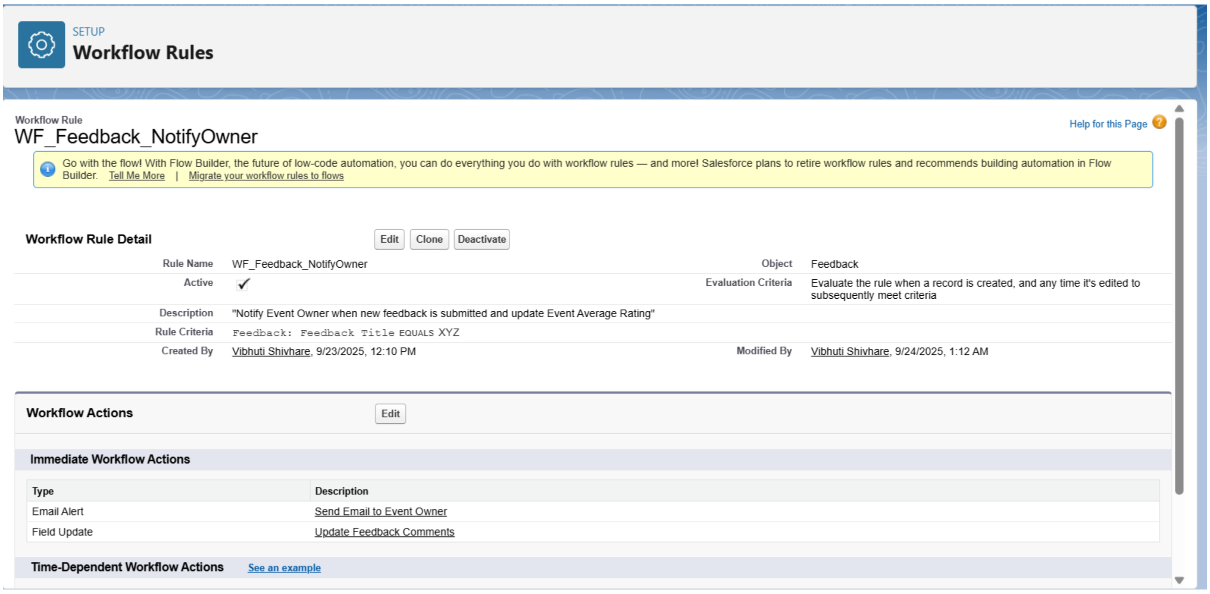
Steps to Create:

1. Go to **Setup → Workflow Rules**.
2. Click **New Rule** → Select Object → Next.
3. Define **Rule Criteria**.
4. Add **Workflow Actions**.

5. Save and **Activate**.







3️⃣ Process Builder

Purpose: Advanced automation that can update related records, launch flows, send emails, or call Apex.

Steps to Create:

1. Go to **Setup → Process Builder → New**.
2. Enter **Process Name** and select **The process starts when…**.
3. Add **Criteria** for triggering actions.
4. Add **Immediate or Scheduled Actions** (Email Alerts, Field Updates, etc.).
5. Save and **Activate**.

4️⃣ Approval Process

Purpose: Automates record approvals with defined steps and approvers.

Steps to Create:

1. Go to **Setup → Approval Processes → Create New Approval Process**.
2. Choose **Use Standard Setup Wizard**.
3. Define **Entry Criteria** and **Approvers**.
4. Specify **Approval Steps** and **Actions** (Email Alerts, Field Updates, Tasks).
5. Save and **Activate**.

5️⃣ Flow Builder

Purpose: Powerful automation tool to create **Screen Flows, Record-Triggered Flows, Scheduled Flows, and Auto-launched Flows**.

Types:

- **Screen Flow:** For user interaction.
- **Record-Triggered Flow:** Automates actions on create/update/delete.
- **Scheduled Flow:** Runs at specified intervals.
- **Auto-launched Flow:** Runs without user interaction, usually from Process Builder or Apex.

Steps to Create:

1. Go to **Setup → Flow → New Flow**.
2. Select **Flow Type** → Click **Create**.

3. Drag **Elements** to define logic (Screen, Get Records, Update Records, Decision).
4. Connect elements → Save → **Activate**.

6️⃣ Email Alerts

Purpose: Automatically send emails based on triggers.

Steps to Create:

1. Go to **Setup → Email Alerts → New Email Alert**.
2. Choose **Object**, **Recipients**, and **Email Template**.
3. Link to Workflow, Process Builder, or Flow.
4. Save.

7️⃣ Field Updates

Purpose: Automatically update field values based on conditions.

Steps to Create:

1. Can be used with Workflow, Process Builder, or Flow.
2. Define **Target Field** and **Update Logic** (Formula, Static Value, Related Field).
3. Save and activate.

8️⃣ Tasks

Purpose: Automatically create tasks for users to follow up on records.

Steps to Create:

1. Available via Workflow, Process Builder, or Flow.
2. Define **Task Subject, Due Date, Priority**, and **Assigned To**.
3. Save and activate.

9️⃣ Custom Notifications

Purpose: Send real-time notifications to users in Salesforce mobile, desktop, or in-app.

Steps to Create:

1. Go to **Setup → Custom Notifications → New**.
2. Define **Notification Name, Channels**, and **Target Object**.
3. Use Workflow, Process Builder, or Flow to trigger notifications.

4. Save.