

## 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.

### Validation Rules

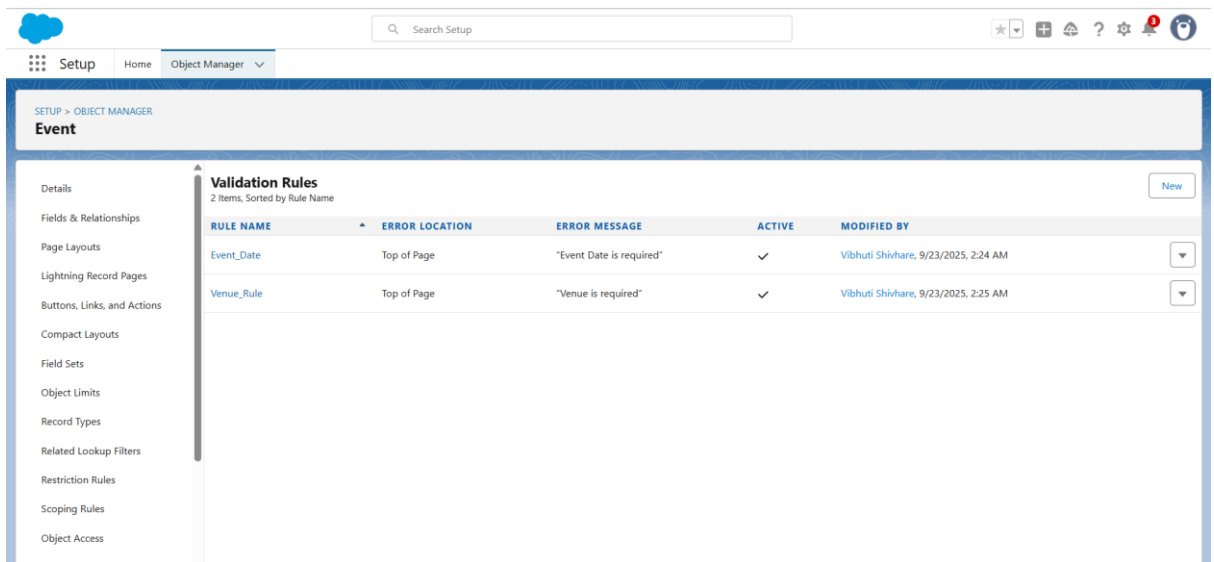
**Purpose:** Ensure data integrity by enforcing specific criteria before a record is saved.

#### 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.



The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Event. The left sidebar contains a list of setup categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Validation Rules' and shows a table with 2 items, sorted by Rule Name. The table has columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. Two validation rules are listed: 'Event\_Date' and 'Venue\_Rule', both active and located at the 'Top of Page'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Event_Date	Top of Page	"Event Date is required"	✓	Vibhuti Shrivhare, 9/23/2025, 2:24 AM
Venue_Rule	Top of Page	"Venue is required"	✓	Vibhuti Shrivhare, 9/23/2025, 2:25 AM

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Attendee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Validation Rules

4 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Attendee_Name	Top of Page	"Attendee Name is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:36 AM
Email_required	Top of Page	"Email is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:36 AM
Event_must_be_selected	Top of Page	"Attendee must be associated with an Event"	✓	Vibhuti Shivhare, 9/23/2025, 2:37 AM
Phone_number_required	Top of Page	"Phone Number is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:39 AM

SETUP > OBJECT MANAGER

Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Validation Rules

4 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Attendee	Top of Page	"Feedback must be associated with an Attendee"	✓	Vibhuti Shivhare, 9/23/2025, 2:45 AM
Event	Top of Page	"Feedback must be associated with an Event"	✓	Vibhuti Shivhare, 9/23/2025, 2:44 AM
Feedback_Title_required	Top of Page	"Feedback Title is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:42 AM
Rating	Top of Page	"Rating must be between 1 and 5"	✓	Vibhuti Shivhare, 9/23/2025, 2:43 AM

## 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**.

SETUP

Workflow Rules

Workflow Rule

WF\_Event\_NotifyManager

Help for this Page

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](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Event_NotifyManager	Object	Event
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	(Event: Event Name EQUALS Conference) AND (Event: Event picklist EQUALS Conference) AND (Event: Venue EQUALS Auditorium) AND (Event: Total Attendees GREATER THAN 0)		
Created By	Vibhuti Shivhare, 9/23/2025, 10:39 AM	Modified By	Vibhuti Shivhare, 9/24/2025, 12:58 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Sends an email to the Event Manager when a new Conference Event__c record is created, including Event Name, Event Date, Venue, and Total Attendees.
Field Update	Update Event Status

Time-Dependent Workflow Actions

See an example

SETUP

Workflow Rules

Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Attendee_Confirmation	Object	Attendee
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Attendee: Attendee Name EQUALS Conference		
Created By	Vibhuti Shivhare, 9/23/2025, 11:38 AM	Modified By	Vibhuti Shivhare, 9/24/2025, 1:07 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Send confirmation email to Attendee and notify Event Owner
Field Update	Update Attendee Status

Time-Dependent Workflow Actions

See an example

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Edit

SETUP

Workflow Rules

Workflow Rule

WF\_Feedback\_NotifyOwner

Help for this Page

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Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Feedback_NotifyOwner	Object	Feedback
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	"Notify Event Owner when new feedback is submitted and update Event Average Rating"		
Rule Criteria	Feedback: Feedback Title EQUALS XYZ		
Created By	Vibhuti Shivhare, 9/23/2025, 12:10 PM	Modified By	Vibhuti Shivhare, 9/24/2025, 1:12 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Send Email to Event Owner
Field Update	Update Feedback Comments

Time-Dependent Workflow Actions

See an example

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## 3 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**.

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## 4 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**.

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## 5 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**.
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## **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.
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## **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.
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## **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.
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## **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.

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