

PROCESS AUTOMATION – PHASE 4

1. Validation Rules

Crop listing

SETUP > OBJECT MANAGER

Crop Listing

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Validation Rules

3 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Availability_Date_Not_Past	Availability Date	Availability date cannot be in the past.	✓	Makkena Vighnasri, 9/26/2025, 8:14 AM	▼
Crop_Price_NonNegative	Price	Price cannot be negative	✓	Makkena Vighnasri, 9/26/2025, 8:10 AM	▼
Crop_Quantity_Positive	Location	Quantity must be greater than 0.	✓	Makkena Vighnasri, 9/26/2025, 8:09 AM	▼

Buyer Requirement

SETUP > OBJECT MANAGER

Buyer Requirement

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Budget_NonNegative	Budget Price	Budget price cannot be negative.	✓	Makkena Vighnasri, 9/26/2025, 8:20 AM	▼
Requirement_Quantity_Positive	Quantity Needed	Please enter a positive required quantity.	✓	Makkena Vighnasri, 9/26/2025, 8:19 AM	▼

Farming order

SETUP > OBJECT MANAGER

Farming Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Validation Rules

2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Order_Amount_Positive	Total Amount	Total Amount must be zero or positive.	✓	Makkena Vighnasri, 9/26/2025, 8:25 AM	▼
Order_Crop_Required	Crop	Please select a Crop before saving the Order.	✓	Makkena Vighnasri, 9/26/2025, 8:23 AM	▼

Shipment

SETUP > OBJECT MANAGER

Shipment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

Rule Name

Error Location

Error Message

Active

Modified By

ETA_Not_Before_Shipment

Top of Page

ETA cannot be earlier than Shipment Date.

✓

Makkena Vighnasri, 9/26/2025, 8:27 AM

Payment

SETUP > OBJECT MANAGER

Payment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

Rule Name

Error Location

Error Message

Active

Modified By

Payment_Amount_Positive

Amount

Payment amount must be greater than zero.

✓

Makkena Vighnasri, 9/26/2025, 8:42 AM

Feedback

SETUP > OBJECT MANAGER

Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Validation Rules

1 Items, Sorted by Rule Name

Rule Name

Error Location

Error Message

Active

Modified By

Feedback_Rating_Valid

Rating

Please enter a rating between 1 and 5.

✓

Makkena Vighnasri, 9/26/2025, 8:46 AM

2. WorkFlow Rules

Q workflow

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP

Workflow Rules

Workflow Rule

Payment_Reminder_Email

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

Rule Name

Payment_Reminder_Email

Active

✓

Description

ISPICKVAL(Payment_Status__c, "Pending")

Created By

Makkena Vighnasri, 9/27/2025, 10:34 AM

Object

Payment

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Modified By

Makkena Vighnasri, 9/27/2025, 11:47 AM

Workflow Actions

Immediate Workflow Actions

Type

Email Alert

Description

Email Alert

3. Process Builder

SetupHomeObject Manager

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.

Try Flow Builder | Use Migrate to Flow Tool

Process BuilderBack To SetupHelp

My Processes1 items

New

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Update Order on Payment		Payment	Record Change	9/28/2025	Active	

4. Approval Process

Approval

✓ Data

Mass Transfer Approval Requests

✓ Feature Settings

Approval Settings

✓ Process Automation

Approval Processes

Didn't find what you're looking for?
Try using Global Search.

Approval Processes

Buyer Requirement: Buyer_Requirement_Approval

Back to Approval Process List

Process Definition Detail

EditCloneDeactivate

Process Name	Buyer_Requirement_Approval	Active	✓
Unique Name	Buyer_Requirement_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Quantity_Needed__c > 0		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Buyer Requirement Owner		
Created By	Makkena Vignnassi	9/28/2025, 2:59 AM	Modified By Makkena Vignnassi 9/28/2025, 3:05 AM

5. Flow Builder

Flow BuilderAuto_Create_Shipment_On_Order_Confirmed - V1

Select Elements

Auto-Layout

Last saved on 9/28/2025, 11:10 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: Farming Order

Trigger: A record is updated

Conditions: 1

Optimize for: Actions and Related Recor...

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Farmin...

Run Immediately

+ Create Shipment

Create Records

Create Records

*Object

Shipment

Set Field Values for the Shipment

Field	Order	Value	\$Record.Id
Field	Status	Value	Packed
Field	Shipment Date	Value	TodayDate

+ Add Field

☐ Manually assign variables (advanced)

6. Email Alerts

The screenshot shows the 'Classic Email Templates' setup page in Salesforce. The left sidebar contains a search bar with 'Email' and a list of navigation items: Email (selected), Apex Exception Email, Authorized Email Domains, Classic Email Templates, Classic Letterheads, Compliance BCC Email, DKIM Keys, Delete Attachments Sent as Links, Deliverability, and Email Address. The main content area is titled 'SETUP Classic Email Templates' and shows a 'Text Email Template' named 'Pending_Payment_Reminder'. Below the title, it says 'Preview your email template below.' and provides buttons for 'Edit', 'Delete', and 'Clone'. The 'Email Template Detail' section includes a table with the following data:

Email Templates from Salesforce		Unified Public Classic Email Templates
Email Template Name	Pending_Payment_Reminder	Available For Use <input checked="" type="checkbox"/>
Template Unique Name	Pending_Payment_Reminder	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Makkena Vighnassi (Change)	
Description		
Created By	Makkena Vighnassi, 9/27/2025, 11:36 AM	Modified By: Makkena Vighnassi, 9/27/2025, 11:36 AM

Buttons for 'Edit', 'Delete', and 'Clone' are located at the bottom of the detail section.

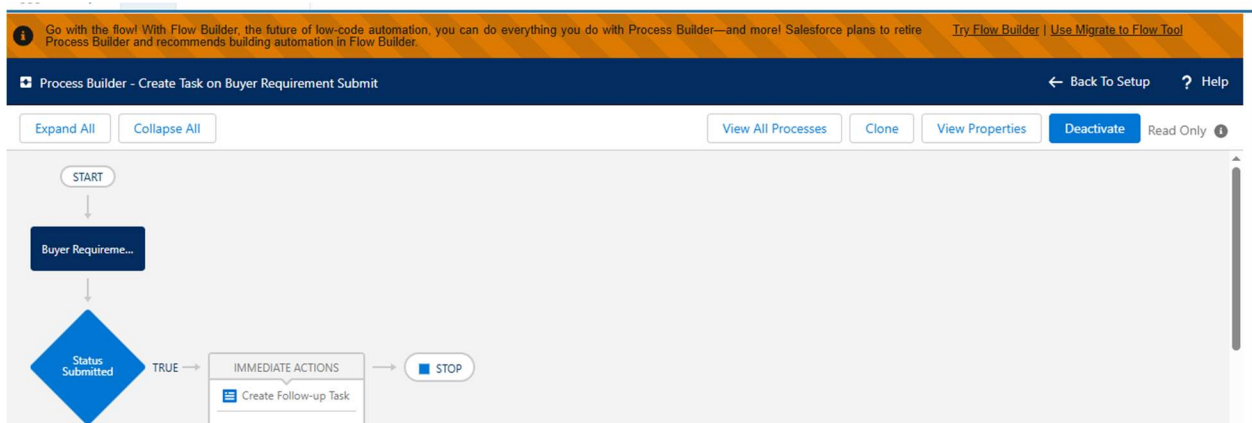
7. Field Updates

The screenshot shows the 'Workflow Rules' setup page in Salesforce. The left sidebar contains a search bar with 'work' and a list of navigation items: Process Automation (selected), Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, Workflow Rules (selected), User Interface, Console Settings, Console Workspace Page, Loading Preference, and Translation Workbench. The main content area is titled 'SETUP Workflow Rules' and shows a 'Workflow Rule' named 'Set Status Under Review'. Below the title, it says '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.' and provides buttons for 'Edit', 'Clone', and 'Deactivate'. The 'Workflow Rule Detail' section includes a table with the following data:

Workflow Rule Detail	
Rule Name	Set Status Under Review
Active	<input checked="" type="checkbox"/>
Object	Buyer Requirement
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	
Rule Criteria	Buyer Requirement: Status EQUALS Submitted
Created By	Makkena Vighnassi, 9/28/2025, 10:59 AM
Modified By	Makkena Vighnassi, 9/28/2025, 11:03 AM

Buttons for 'Edit', 'Clone', and 'Deactivate' are located at the top of the detail section. Below the detail section, there is a 'Workflow Actions' section with an 'Edit' button, and an 'Immediate Workflow Actions' section.

8. Tasks



9. Custom Notifications

orgfarm-1d4ec8c730-dev-ed.develop.lightning.force.com/lightning/r/FlowRecord/2aFgK000005T2BxUAK/view

All Bookmarks

Q Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Order Shipped Notification More

Flow

Order Shipped Notification

Open Flow Open Latest Version Sharing

Type

Record—Run After Save

Associated Record

Progress Status

Activated

Last Modified Date

9/29/2025, 10:25 AM

Flow Owner

Makkena Vighnasri

Related

Details

Information

Flow Label

Order Shipped Notification

API Name

Order_Shipped_Notification

Description

Flow Type

Record-Triggered After Save Flow

Associated Record

Segment

Created By

Makkena Vighnasri, 9/29/2025, 10:24 AM

Created Date

9/29/2025, 10:24 AM

Last Modified

Makkena Vighnasri, 9/29/2025, 10:25 AM

Last Modified Date

9/29/2025, 10:25 AM