

Recipe & Meal Planning manager

Phase 4: Process Automation (Admin)

- Validation Rules
- Workflow Rules
- Process Builder
- Approval Process
- Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)
- Email Alerts
- Field Updates
- Tasks
- Custom Notifications

Validation Rules:

What are Validation Rules?

Validation rules verify that the data entered into a record meets specific criteria before the record can be saved.

- They help maintain **data quality**.
- They prevent users from entering incorrect or incomplete data.
- When conditions are not met, an **error message** is displayed.

Validation Rules Implemented in this Project

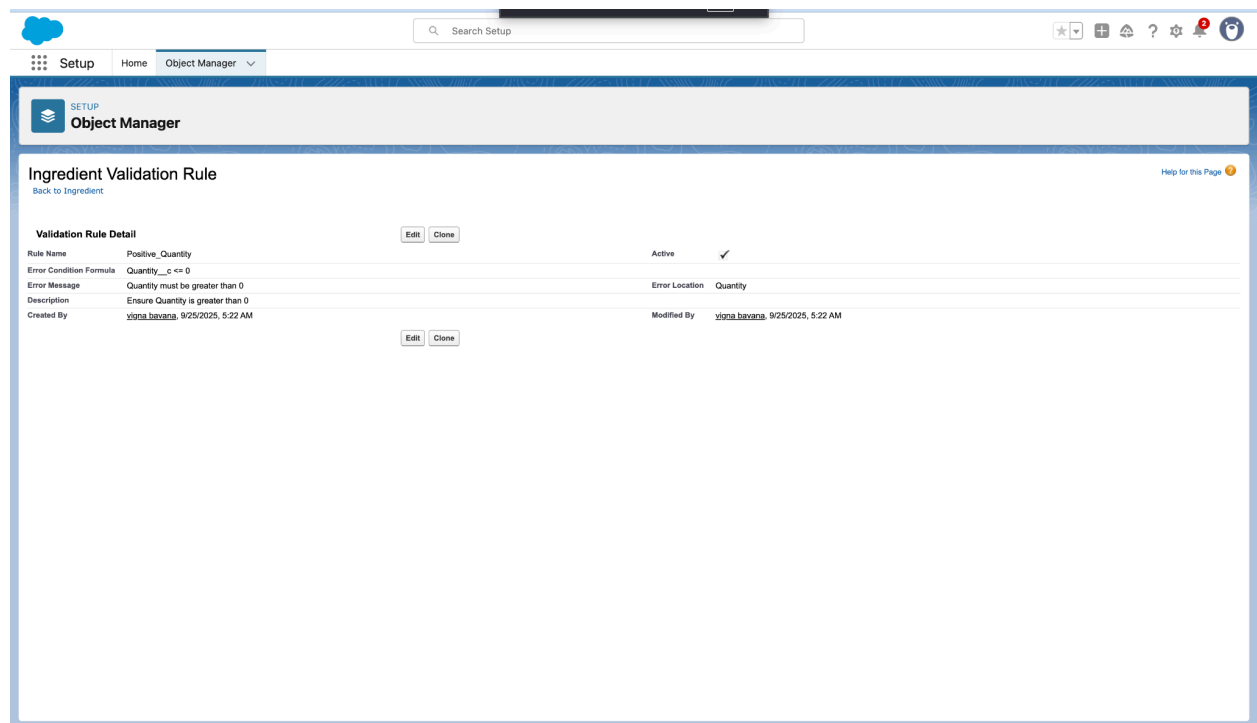
1. Ingredient – Positive Quantity

- **Rule Name:** `Positive_Quantity`
- **Object:** Ingredient

Error Condition Formula:

`Quantity__c <= 0`

-
- **Error Message:** Quantity must be greater than zero.
- **Error Location:** Field → Quantity
- **Purpose:** Prevents users from entering zero or negative ingredient quantities.



2. Meal Plan – End Date Check

- **Rule Name:** `EndDate_After_StartDate`
- **Object:** Meal Plan

Error Condition Formula:

`End_Date__c < Start_Date__c`

- **Error Message:** End Date cannot be earlier than Start Date.
- **Error Location:** Field → End Date
- **Purpose:** Ensures meal plans always have valid date ranges.

The screenshot shows the Salesforce Object Manager interface for a 'Meal Plan' object. The 'Validation Rule' tab is selected, displaying the configuration for a rule named 'Valid_Dates'. The rule is active and has the formula 'End_Date__c < Start_Date__c'. The error message is 'End Date cannot be earlier than Start Date', and the error location is 'End Date'. The rule was created by 'yiona.bayana' on 9/25/2025 at 5:31 AM.

Validation Rule Detail		Active	✓
Rule Name	Valid_Dates		
Error Condition Formula	End_Date__c < Start_Date__c		
Error Message	End Date cannot be earlier than Start Date	Error Location	End Date
Description	Should follow the dates		
Created By	yiona.bayana, 9/25/2025, 5:31 AM	Modified By	yiona.bayana, 9/25/2025, 5:31 AM

Process Automation – Workflow Rules

Object: Meal Plan

Rule Name: MealPlan_Notification

Description: Sends an email alert to the selected users when a new Meal Plan is created.

Evaluation Criteria:

- Evaluate the rule **when a record is created**.

Rule Criteria:

- Meal Plan Name **not equal to null**

Immediate Workflow Actions:

- **Email Alert:** New Meal Plan Notification
 - **Recipients:** Selected users (e.g., Admin, End User)
 - **Template Used:** Email template “New Meal Plan Notification”
 - **From Email Address:** Current user’s email

Testing / Verification:

1. Go to **Meal Plan** → **New Meal Plan**.
2. Enter sample data (e.g., **Weekly Healthy Plan**).
3. Save the record.
4. Verify that the selected recipients receive the email notification.

Notes:

- Workflow rules are now considered legacy; Salesforce recommends using **Flow Builder** for future automation.
- Works with **time-dependent actions**, **field updates**, **tasks**, and **custom notifications**.

SetupHomeObject Manager

Search Setup

StarAddRefreshHelpSettingsNotificationsProfile

email te

Email

- Classic Email Templates
- Lightning Email Templates

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SETUP

Classic Email Templates

Text Email Template

New Meal Plan Notification

Help for this Page

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce

Unified Public Classic Email Templates

Email Template Name

New Meal Plan Notification

Template Unique Name

New_Meal_Plan_Notification

Encoding

Unicode (UTF-8)

Author

vigna.bavana (Change)

Description

Created By

vigna.bavana, 9/25/2025, 5:44 AM

Available For Use

☐

Last Used Date

Times Used

Modified By

vigna.bavana, 9/25/2025, 5:44 AM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

New Meal Plan Created

Plain Text Preview

A new Meal Plan "[Meal_Plan__c:Meal_Plan_Name__c]" has been created by ("User.Name").

Attachments

Attach File

No records to display.

mealtime

Search...

StarAddRefreshHelpSettingsNotificationsProfile

Recipe & Meal Plan...RecipesIngredientsMeal PlansShopping ListsChatterReports

Meal Plan

cheat day

New ContactEditNew Opportunity

RelatedDetails

Meal Plan Name

cheat day

Start Date

9/27/2025

End Date

9/30/2025

Created By

vigna.bavana, 9/25/2025, 5:56 AM

Owner

vigna.bavana

Last Modified By

vigna.bavana, 9/25/2025, 5:56 AM

Activity

CalendarTasksEmailChatter

Filters: All time • All activities • All types

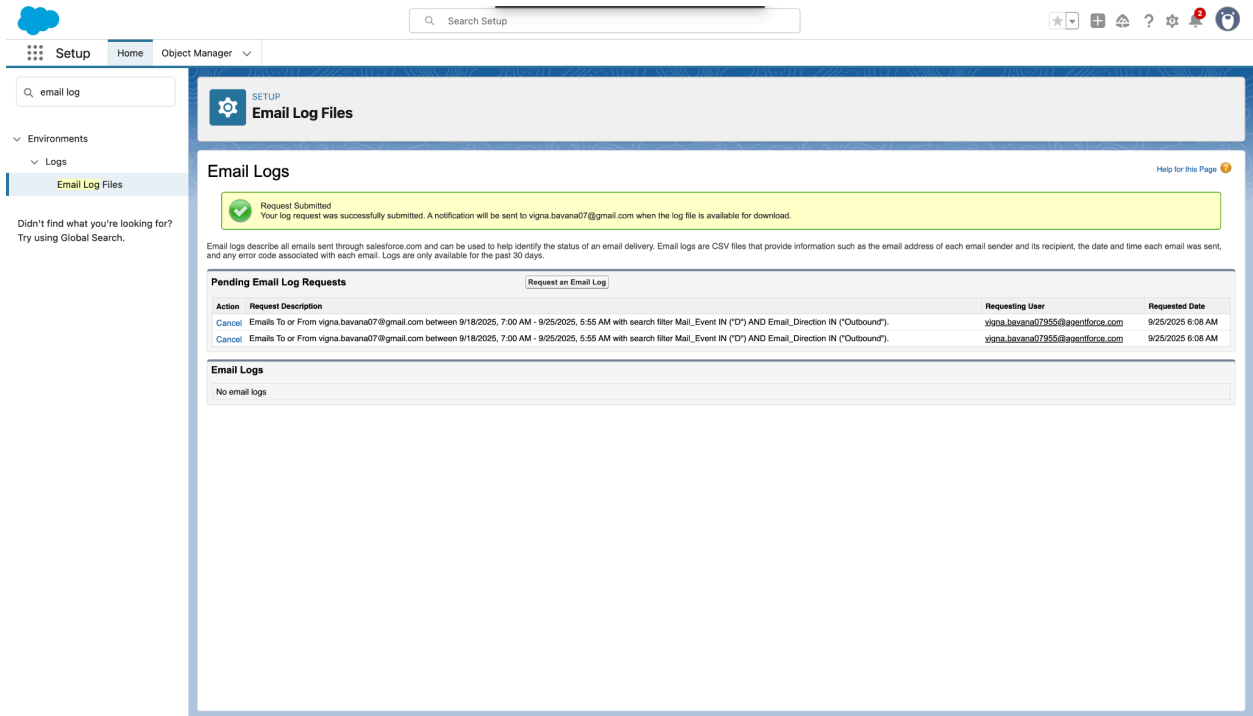
RefreshExpand AllView All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.



Process Builder: Notify Admin on New Meal Plan

1. Purpose

Automatically notify the admin (or selected users) whenever a new Meal Plan is created in Salesforce. This ensures timely awareness and oversight for Meal Plans.

2. Object

- Meal Plan

3. Process Name

- Notify Admin - New Meal Plan

4. Criteria

- Condition: Meal Plan Name is not null
- Evaluation: Evaluate the rule when a record is created

5. Immediate Actions

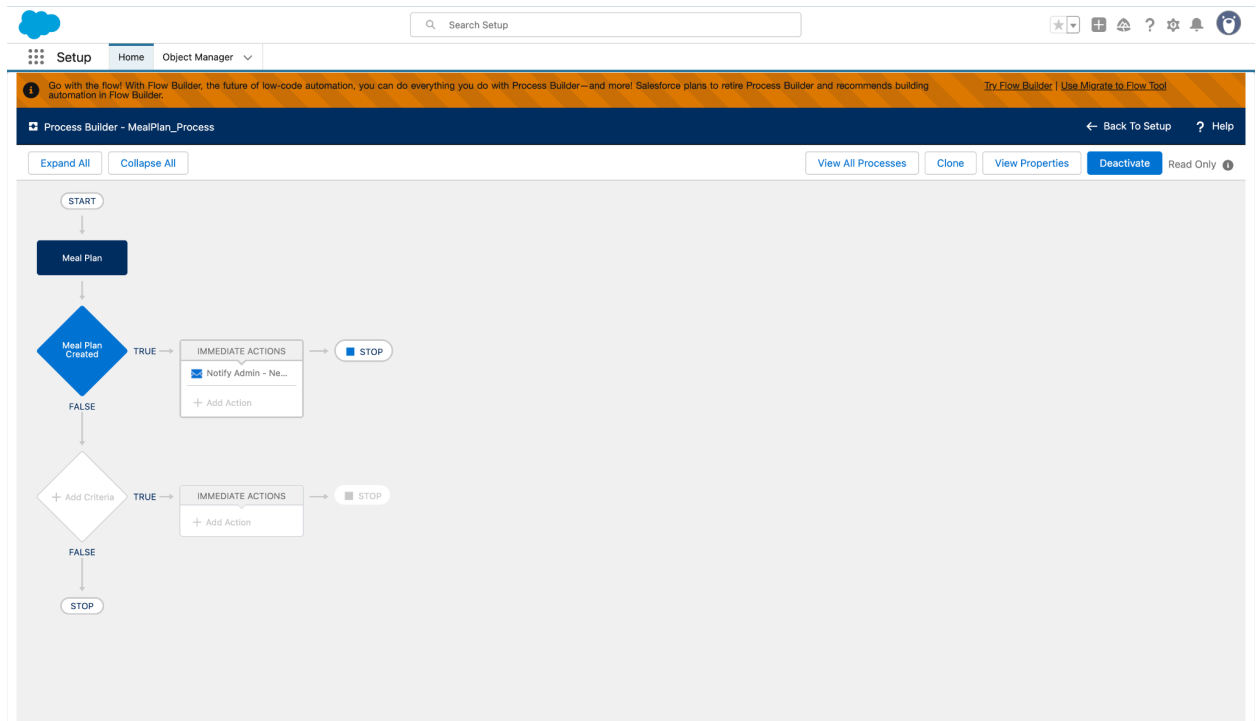
- **Action Type:** Email Alert
- **Action Name:** Notify Admin - New Meal Plan
- **Email Alert Used:** MealPlan_Notification
 - **Email Template:** New_Meal_Plan_Created
 - **Recipients:** User: vigna bavana (or any valid admin/user)
 - **From Email Address:** Current User's email

6. Activation

- The process is **activated** and ready to trigger automatically when a new Meal Plan is created.

7. Testing

1. Go to **Meal Plans** → **New**
2. Create a sample Meal Plan, e.g., Weekly Healthy Plan
3. Save the record
4. Check if the **selected recipient receives the email**
5. Confirm email template content is correct



Approval Process – Meal Plan Approval

1. Purpose

Ensure that any new **Meal Plan** created is **reviewed and approved** by an admin or designated approver before it is used or shared with users. This helps maintain quality and prevents mistakes in planning.

2. Object

- **Meal Plan**

3. Create Approval Process

1. Go to **Setup** → **Process Automation** → **Approval Processes**.
2. Select **Meal Plan** as the object.
3. Click **Create New Approval Process** → **Use Standard Setup Wizard**.

4. Step 1: Enter Approval Process Information

- **Name:** `Meal Plan Approval`
- **Unique Name:** auto-generated
- **Entry Criteria:**
 - `Meal Plan Name` is not null (or any specific criteria if needed)
- **Specify Approver:** Choose **User/Manager/Queue** who will approve Meal Plans.
 - Example: **Project Admin** or **Recipe Manager**.

5. Step 2: Specify Initial Submitters

- **Who can submit records for approval:** All users who can create Meal Plans.
- Optionally, limit to specific roles or profiles.

6. Step 3: Specify Approval Steps

- **Step Name:** `Admin Approval`
- **Assigned Approver:** Select **Project Admin** (or a specific user/queue)
- **Record Editability:** Decide if the user can edit while pending:
 - Usually: **Read-Only** until approved/rejected.

7. Step 4: Specify Final Approval Actions

- **Actions on Approval:**
 - Email Alert: Notify creator that the Meal Plan is approved.

- Field Update: Set a checkbox like `Approved__c = TRUE`.
- **Actions on Rejection:**
 - Email Alert: Notify creator that the Meal Plan is rejected.
 - Field Update: Optional comments field or `Approved__c = FALSE`.

8. Step 5: Specify Recall Actions

- If the submitter recalls a Meal Plan, define actions:
 - Example: Notify approver that submission was recalled.

9. Activate the Approval Process

- Once all steps and actions are defined, click **Activate**.
- Only **active** approval processes can be used for submission.

10. Testing

1. Create a new Meal Plan (e.g., `Weekly Healthy Plan`).
2. Click **Submit for Approval**.
3. Login as the approver and verify:
 - The Meal Plan appears in **My Approvals**.
 - Approver can approve or reject.
4. Confirm email notifications are received correctly.
5. Check that field updates (like `Approved__c`) work.

The screenshot displays the Salesforce Setup interface for configuring an Approval Process. The left sidebar shows the navigation menu with 'Approval Processes' selected. The main content area is titled 'Approval Processes' and shows the configuration for the 'Meal Plan: Meal Plan Approval' process.

Process Definition Detail

Process Name	Meal Plan Approval	Active	<input type="checkbox"/>
Unique Name	Meal_Plan_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	This approval process ensures that all Meal Plans submitted by users are reviewed and approved by the designated approver before they are finalized. Only Meal Plans with a valid name can be submitted, preventing incomplete or blank records from entering the approval workflow. This helps maintain data accuracy and ensures that only verified meal plans are available to end users.		
Entry Criteria	Meal_Plan: Meal_Plan_Name NOT EQUAL TO null		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	New_Meal_Plan_Created		
Initial Submitters	Meal Plan Owner		
Created By	yvona.bayana, 9/25/2025, 7:17 AM	Modified By	yvona.bayana, 9/25/2025, 7:23 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
Manager Approval Step	1	Manager Approval Step	Approver step for manager to review submitted Meal Plans.		Manually Chosen	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Final Rejection Actions

Action	Type	Description
Record Lock		Unlock the record for editing

Recall Actions

Action	Type	Description
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Flow Builder

Purpose:

To automate sending email notifications to users when a new Meal Plan is created in Salesforce.

Flow Type:

Record-Triggered Flow (fires when a new Meal Plan record is created)

Flow Properties:

- **Flow Label:** Meal Plan Notification Flow
- **Flow API Name:** Meal_Plan_Notification_Flow
- **Description:** Automates sending an email notification using the MealPlan_Notification email alert whenever a new Meal Plan is created.

Steps in Flow:

1. **Start:**

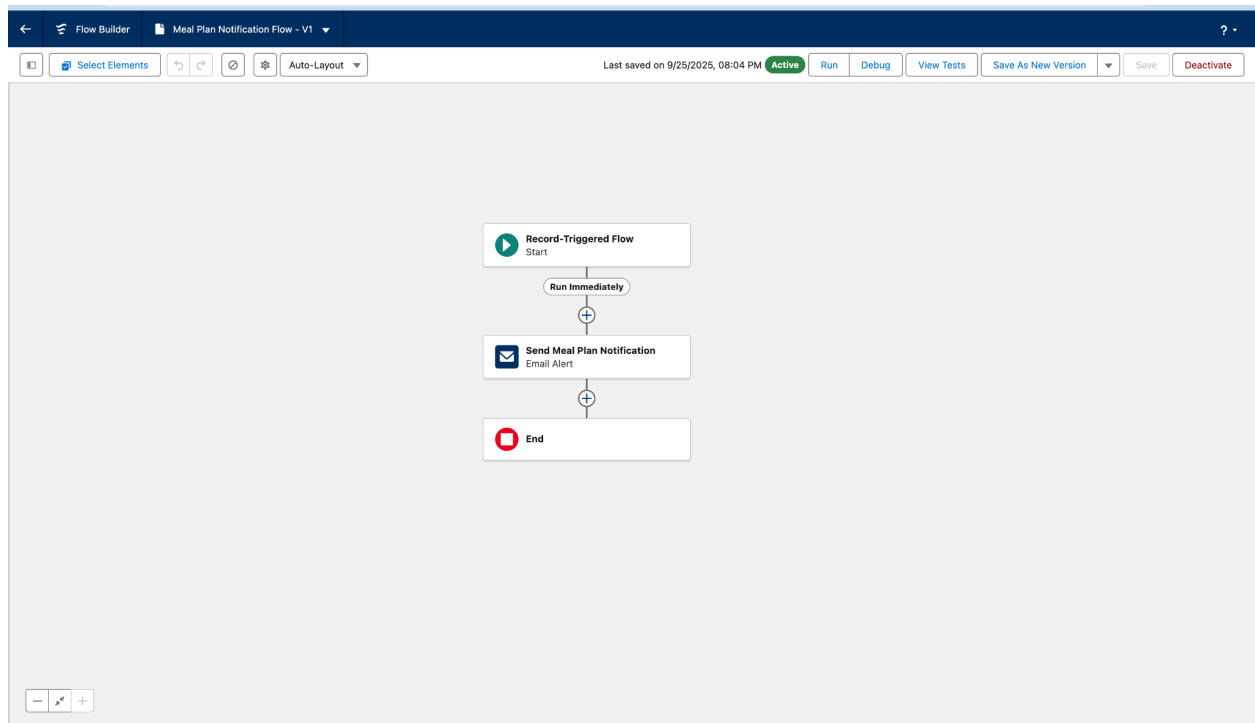
- Trigger: When a record is created
- Object: Meal Plan
- Condition Requirements: None (fires for every new Meal Plan)

2. Action – Email Alert:

- Action Type: Email Alert
- Action Name: `emailAlert-Meal_Plan__c.MealPlan_Notification`
- Email Alert: `MealPlan_Notification`
- Record ID: `$Record.Id` (so that the email contains the details of the newly created Meal Plan)

3. Save & Activate:

- Ensure the flow is **activated**, so it runs automatically whenever a new Meal Plan record is created.

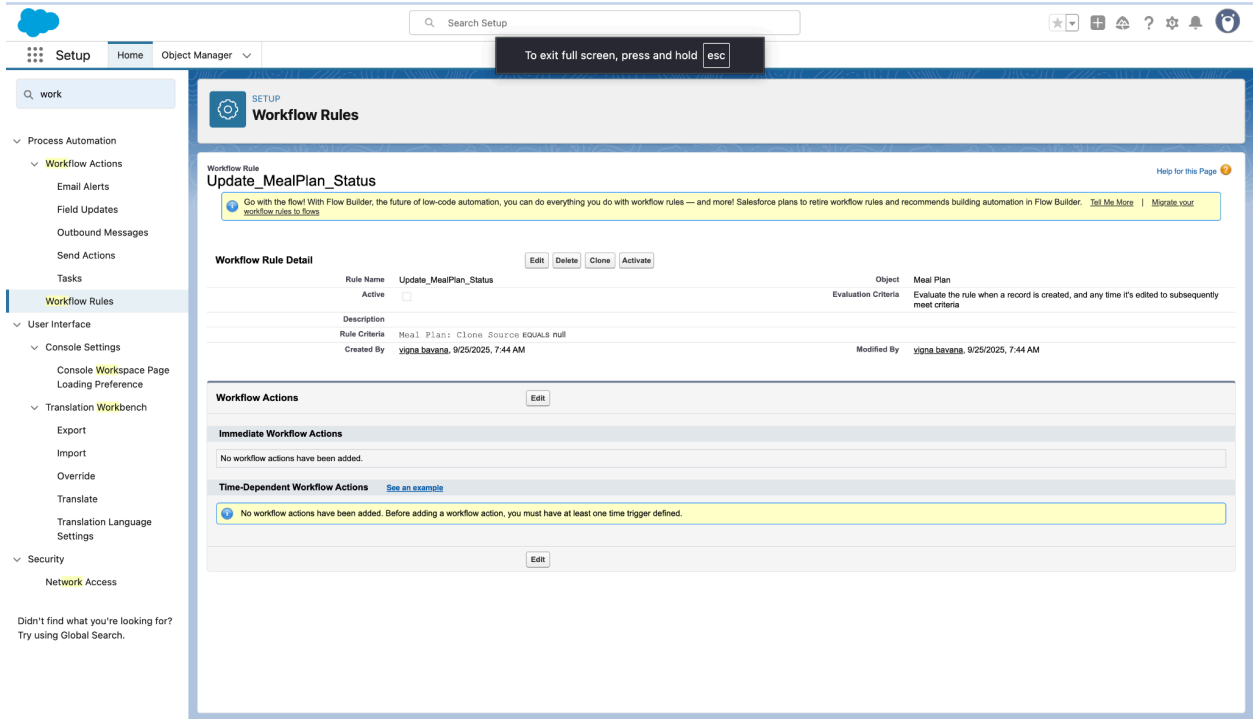


Email Alerts

- **Purpose:** Notify users when specific events happen (e.g., new Meal Plan created).
- **Implementation:**
 - Created **Email Alert:** `MealPlan_Notification`
 - Email Template: `New_Meal_Plan_Created`
 - Recipient: `vigna bavana` (or other users)
 - Triggered via **Workflow Rule**, **Process Builder**, or **Flow**.
- **Verification:** Create a new Meal Plan → Check if email received.

Field Updates

- **Purpose:** Automatically update a field when certain criteria are met.
- **Example for Project:**
 - **Object:** Meal Plan
 - **Field to Update:** Status__c (Picklist: Pending → Approved)
 - **Criteria:** Approval step completed
 - **Implementation:**
 - Create a **Field Update** action in Workflow or Flow
 - Select the field and set the new value
- **Benefit:** Reduces manual updates, ensures data consistency.



Tasks

- **Purpose:** Create automated tasks for users based on events.
- **Example for Project:**
 - **Object:** Meal Plan
 - **Task Name:** Review Meal Plan
 - **Assigned To:** Meal Plan Owner / Admin
 - **Due Date:** 2 days from creation
 - **Priority:** Normal
 - **Implementation:**
 - Add **Task Action** in Workflow, Process Builder, or Approval Process
 - Task automatically appears in the assigned user's task list.

Custom Notifications

- **Purpose:** Notify users in-app (Lightning Experience) about important events.
- **Example for Project:**
 - **Object:** Meal Plan
 - **Notification Name:** New Meal Plan Alert
 - **Recipient:** Admin / Chef User / Recipe Owner
 - **Implementation:**
 - Go to **Setup** → **Custom Notifications** → **New**
 - Assign notification to a Flow or Process Builder action
 - Users receive in-app pop-up notification in Salesforce.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Troubleshooter, Service, Knowledge, Einstein, Process Automation, User Interface, Environments, Notification Builder, and Security. The 'Custom Notifications' option under 'Notification Builder' is selected. The main content area is titled 'Custom Notifications' and includes a warning message about third-party systems. Below this is a table titled 'Custom Notification Types' with columns for Notification Name, API Name, Namespace, Desktop, and Mobile. Two notification types are listed: 'enablement_coaching_feedback_ready' and 'MealPlan_Notification_Type'. A 'New' button is visible in the top right corner of the table area.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
MealPlan_Notification_Type	MealPlan_Notification_Type		✓	✓ ▼