Phase 4 Summary: Process Automation

Project: Residential Maintenance Request Portal

This phase focused on building the "engine" of the application to automate tasks, enforce rules, and guide users.

1. Validation Rule: Require Issue Description

- **Purpose**: To ensure data quality by preventing users from saving a Maintenance_Request__c record if the Issue_Description__c field is empty.
- **How it Works**: A formula checks if the description is blank and displays an error message if the user tries to save without it.


## 2. Screen Flow: New Maintenance Request Wizard

- **Purpose**: To provide a simple, step-by-step wizard for users to create new maintenance requests quickly and accurately.
- **How it Works**: The flow presents a screen that captures the Property Unit, Issue Description, and Priority. It then uses this information to create a new Maintenance_Request__c record. This flow was placed on the Home Page for easy access.
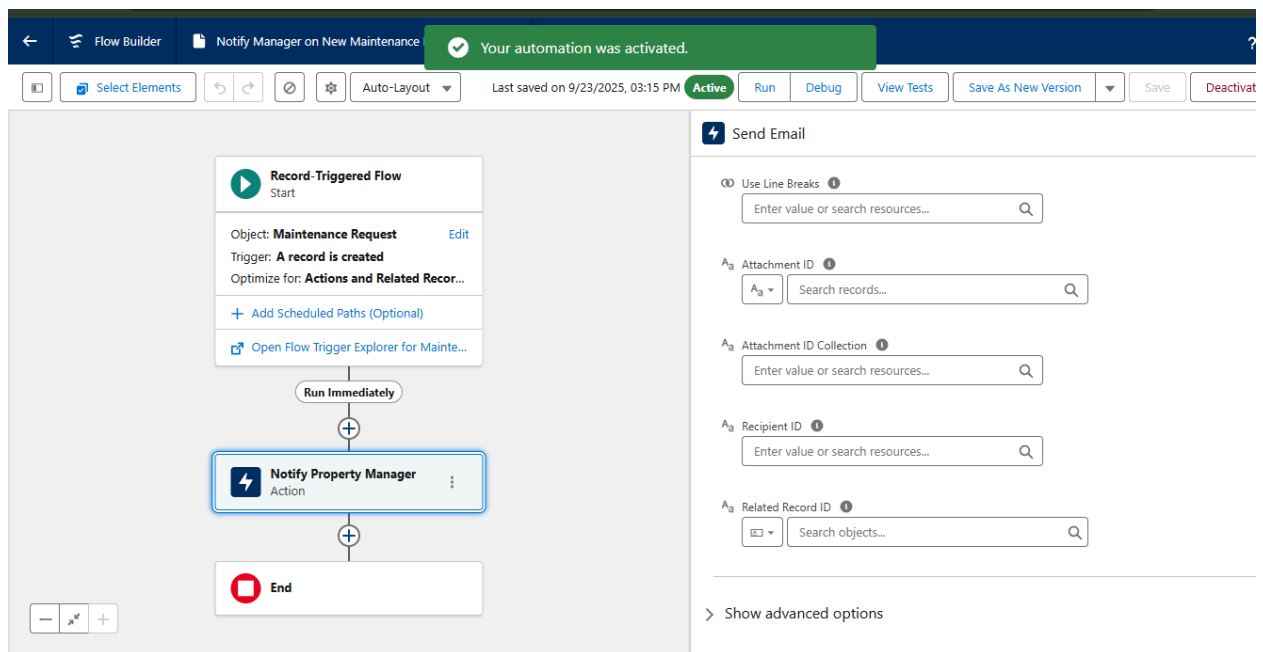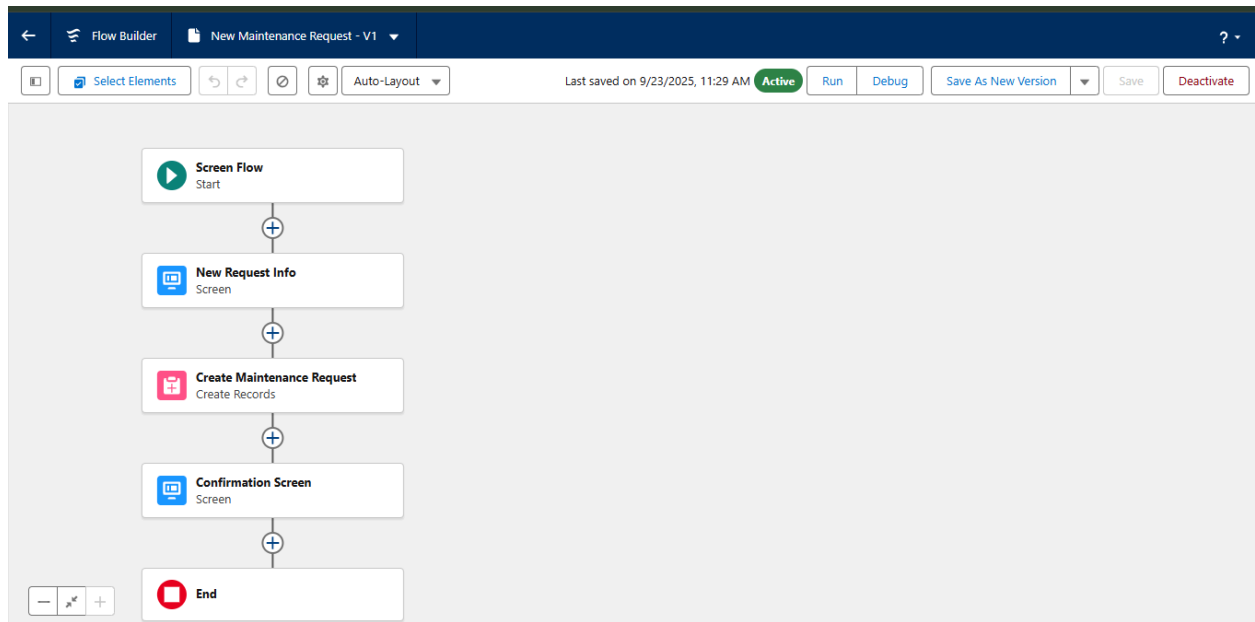
## 3. Record-Triggered Flow: Notify Manager on New Request

- **Purpose**: To instantly inform the Property Manager about new issues without requiring them to manually check for new records.
- **How it Works**: This automation runs automatically in the background whenever a

Maintenance_Request__c record is created. It sends a pre-formatted email alert directly to the manager's inbox
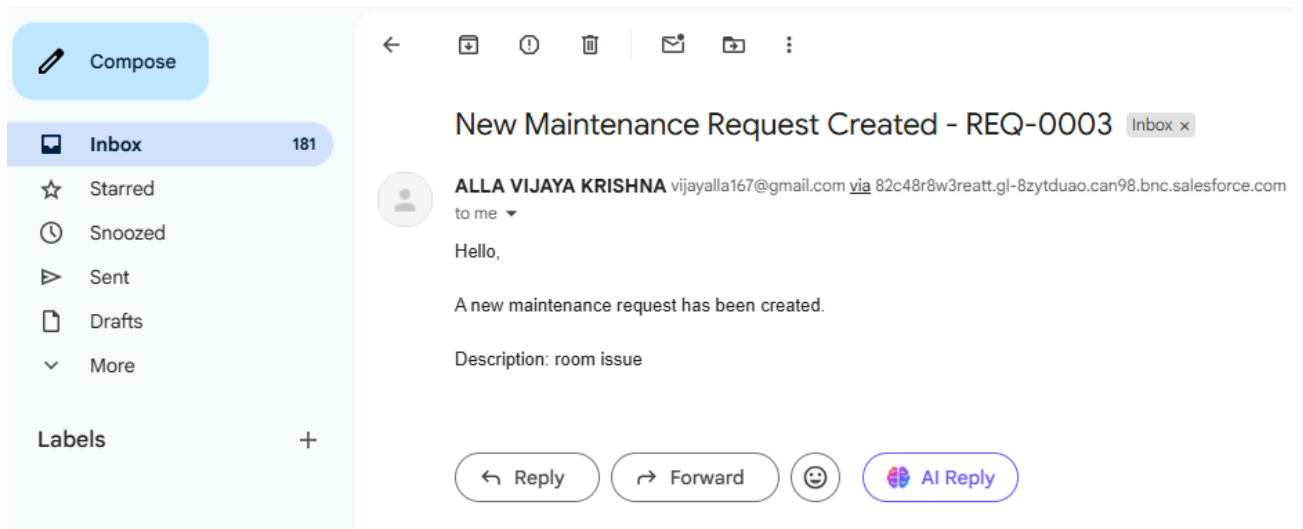
4. Approval Process: High Priority Request Approval

- **Purpose**: To create a formal review and sign-off process for high-priority issues, ensuring management oversight.
- **How it Works**: A user can click a "Submit for Approval" button on any request where the Priority is "High". This locks the record and assigns an official approval request to the Property Manager, who can then approve or reject it from their Home Page.
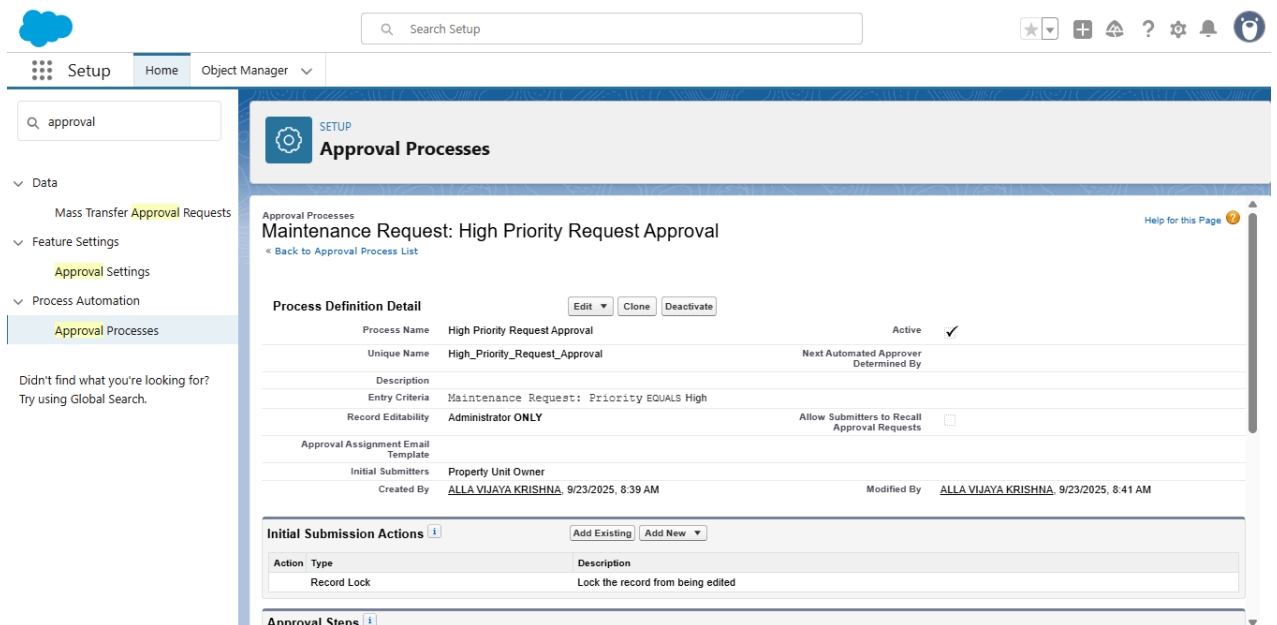
Process Instance Step
Maintenance Request Approval Approved

Submitter	Date Submitted	Actual Approver	Assigned To
ALLA VIJAYA KRISHNA	Sep 23, 2025	Krishna Manager	Krishna Manager

Details

No Comments

Approval Details

Maintenance Request ID
REQ-0004