

Phase 4 — Process Automation (Admin)

Validation Rules — stop bad data at the source

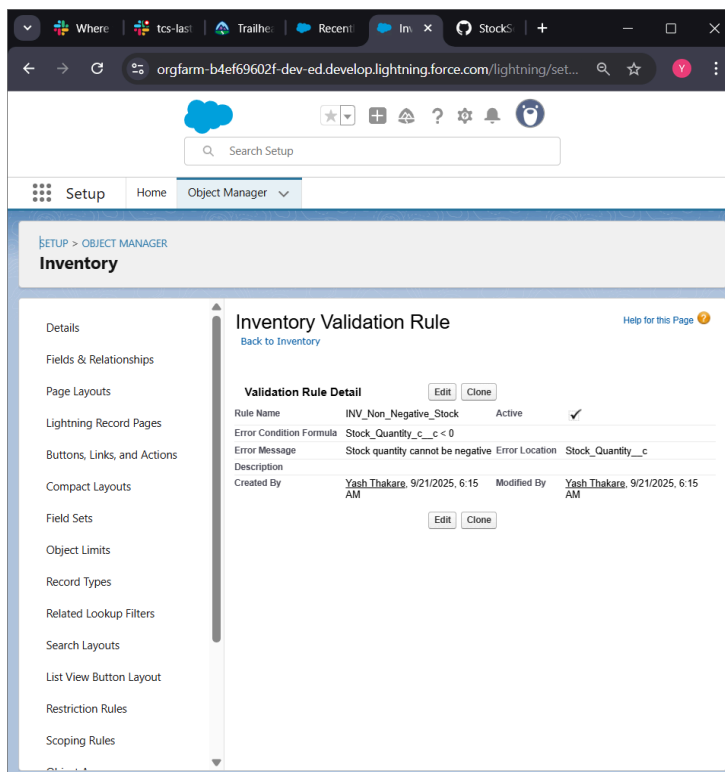
1. Inventory: prevent negative stock

- Rule Name: **INV_Non_Negative_Stock**
- Error Condition Formula:

$\text{Stock_Quantity_c} < 0$

Error Message: **Stock quantity cannot be negative.**

Error Location: Field **Stock_Quantity__c**



2.Procurement Request: Expected Delivery >= Request Date

- Rule Name: **PR_Valid_Expected_Date**
- Formula:

Expected_Delivery_Date__c < Request_Date__c

- Error Message: **Expected Delivery Date cannot be earlier than Request Date.**

The screenshot displays the Salesforce Object Manager interface for a validation rule. The browser address bar shows the URL: `orgfarm-b4ef69602f-dev-ed.develop.lightning.force.com/lightning/set...`. The page title is "Procurement Request Validation Rule". Below the title, there is a "Back to Procurement Request" link and a "Help for this Page" icon. The "Validation Rule Detail" section includes the following information:

Validation Rule Detail	
Rule Name	PR_Valid_Expected_Date
Error Condition Formula	Expected_Delivery_Date__c < Request_Date__c
Error Message	Expected Delivery Date cannot be earlier than Request Date
Error Location	Expected_Delivery_Date__c
Description	
Created By	Yash Thakare, 9/21/2025, 6:17 AM
Modified By	Yash Thakare, 9/21/2025, 6:17 AM

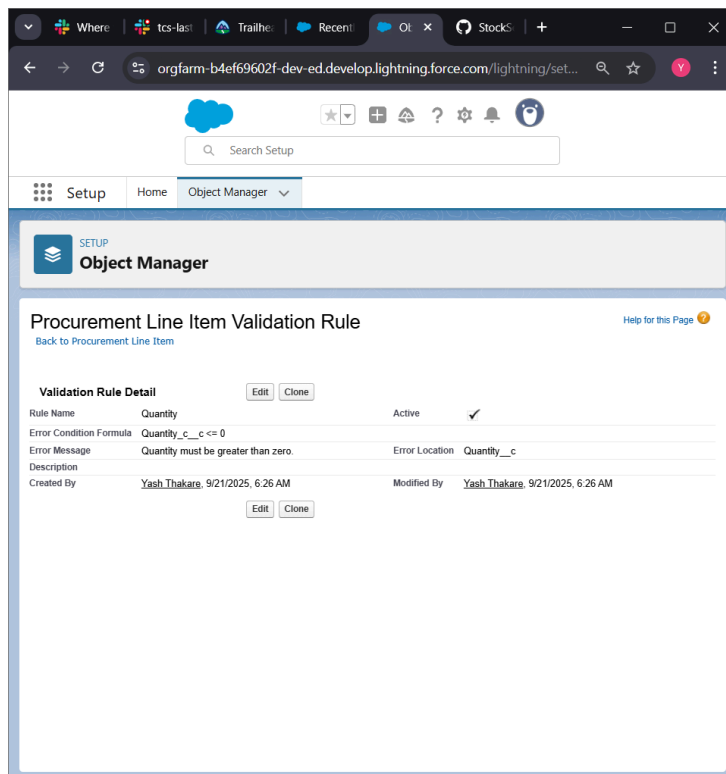
Buttons for "Edit" and "Clone" are visible next to the Rule Name and Description fields. The rule is marked as "Active" with a checkmark icon.

3. Procurement Line Item: Quantity > 0

- Rule Name:- Quantity
- Formula

Quantity__c <= 0

- Message: Quantity must be greater than zero.



Workflow Rules (legacy) — short, use only if needed:-

Workflow (legacy) steps (UI clicks & names)

1. Setup → search Workflow Rules → Workflow Rules → New Rule.

2. Object: select **Procurement_Request** → **Next**.

3. Rule properties:

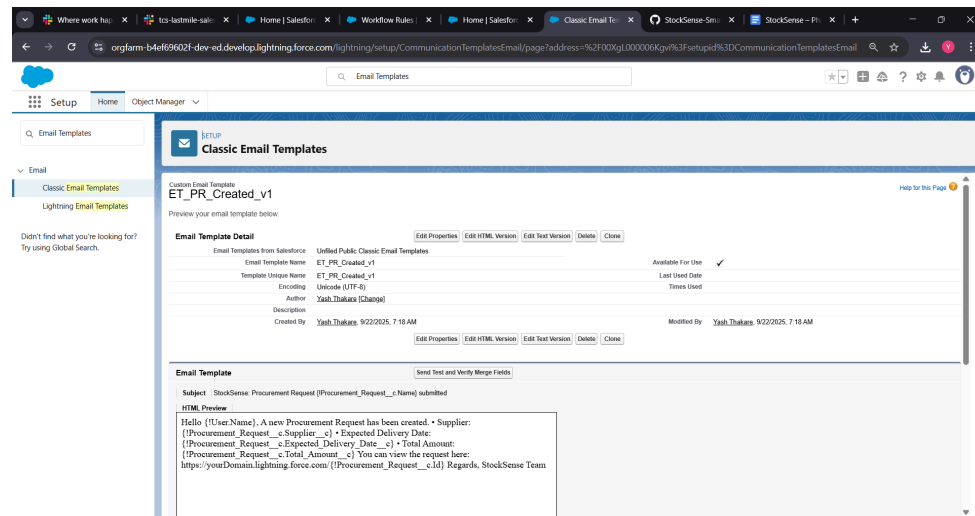
- Rule Name: **WF_PR_AutoEmail_OnCreate_v1**
- Description: **Send email to Inventory/Procurement when a PR is created.**
- Evaluation Criteria: **created** (so it fires only at creation).
- Rule Criteria: **Run this rule if:** Criteria are met → Field **Id not equal null** (or **Status__c != 'Draft'** if you have draft states).
Better: Status__c = 'Submitted' if you set that on creation.

4. Click **Save & Next**.

5. **Immediate Workflow Actions** → **Add Workflow Action** → **New Email Alert** (or add existing).

- Email Alert Name: **EA_PR_Created_v1**

- Email Template:



- Recipients: **Inventory Manager user or Role.**

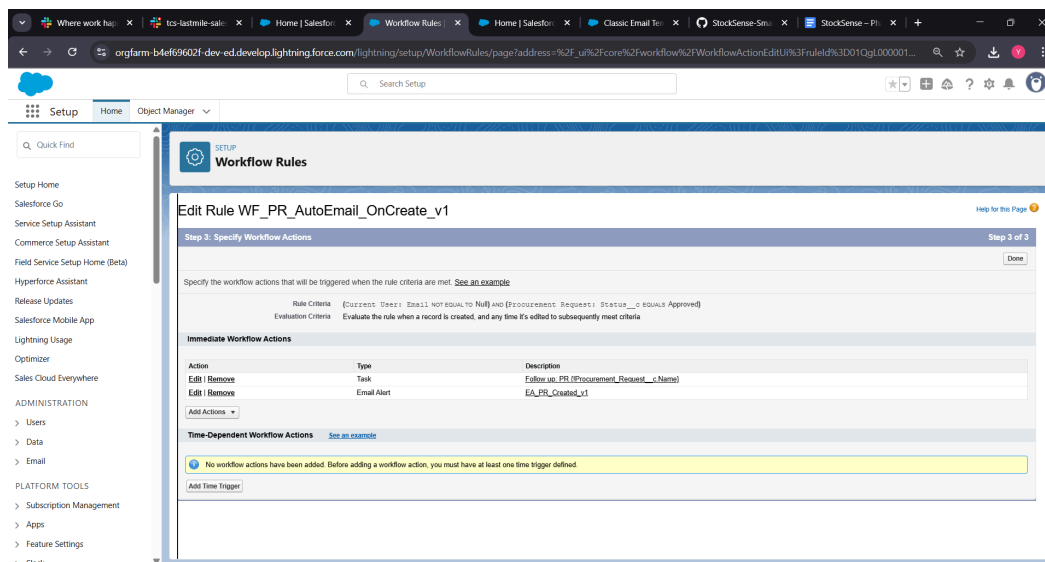
6. (Optional) Add Workflow Action → New Task

- Subject: **Follow up: PR** `{!Procurement_Request__c.Name}`
- Assigned To: Procurement Team or specific user.

7. (Optional) Time-dependent Workflow: 3 days after Created → reminder email/task if PR still **Status = Ordered** not Received.

8. Activate the Workflow Rule.

9. Test in Sandbox: create PR → check email + task.



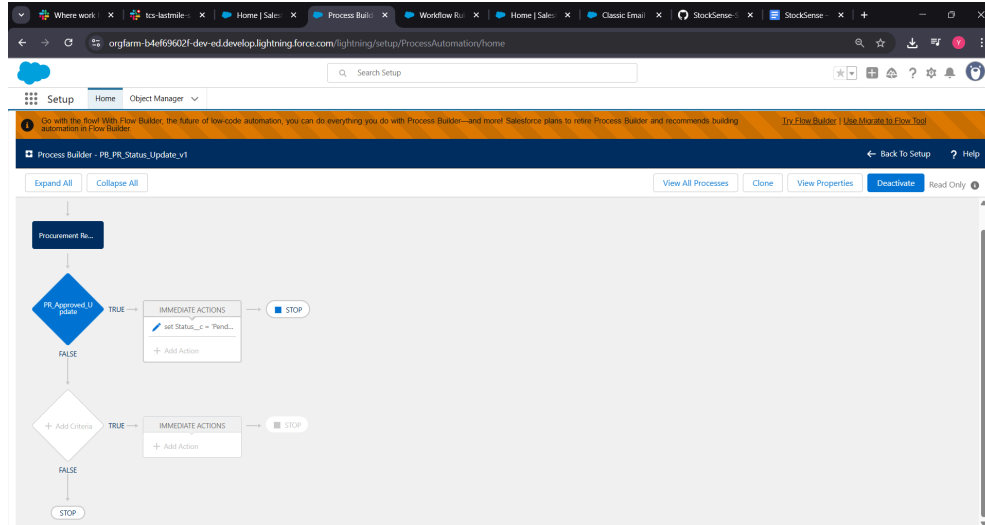
Process Builder (legacy) — example + Flow replacement:-
Setup → **Process Builder** → **New** → Name: **PB_PR_Status_Update_v1**.

Object: Procurement_Request__c → Start the process when a **record is created or edited**.

Add criteria node: **Criteria Name = PR_Approved_Update** → Condition: **Total_Amount__c >= 50000** (example).

Immediate Action → **Update Records**: set `Status__c = 'Pending Approval'` or other fields.

Activate.



Approval Process:-

Setup → **Approval Processes** → Under **Procurement Request** object → **Create New Approval Process** → choose **Use Standard Setup Wizard**.

Name: `AP_PR_HighValue_v1`

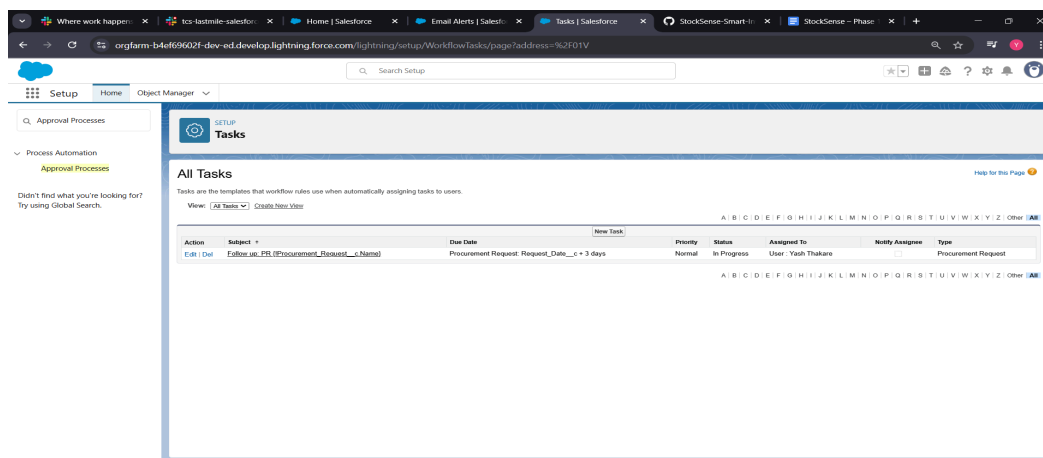
Entry Criteria: `Total_Amount__c >= 50000 AND Status__c = 'Submitted'`

Specify Approver:

- Option A: **Use a specific user or role** → choose **Role: Finance Manager** or user `finance.manager@yourorg.com`.
- Option B: **Use a field** → `Requested_By__r.ManagerId` (dynamic).

Initial Submission Actions:

- **Email Alert:** email the approver
(EA_PR_SubmittedForApproval_v1).
- **Lock Record:** add action **Lock Record** (so edits are blocked).
- And other



Flow Builder — detailed patterns:-

Setup → **Flows** → **New Flow** → choose **Record-Triggered Flow**.

Trigger object: **Inventory__c** → When: **A record is created or updated**.

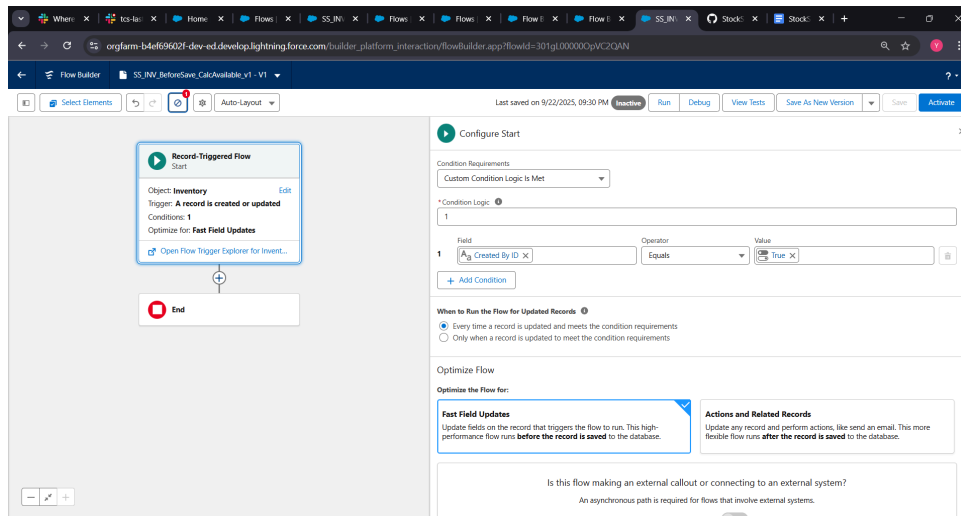
Optimize for: **Fast Field Updates (Before Save)**.

Entry condition (optional): `ISCHANGED(Stock_Quantity__c) || ISCHANGED(Reserved_Quantity__c)`

Assignment element: set `$Record.Available_Quantity__c = $Record.Stock_Quantity__c - $Record.Reserved_Quantity__c`.

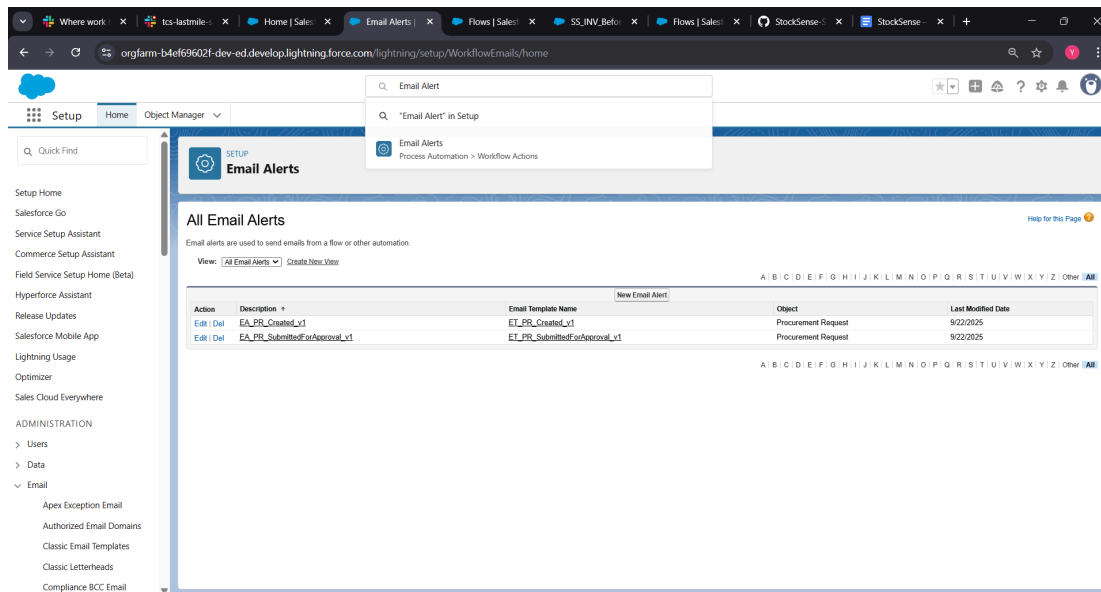
Save → Name: SS_INV_BeforeSave_CalcAvailable_v1 → Activate.

Test: edit Inventory.Stock_Quantity → Available updates instantly.



Email Alerts & Templates:-

First up on we create a Email Templates then alerts the email

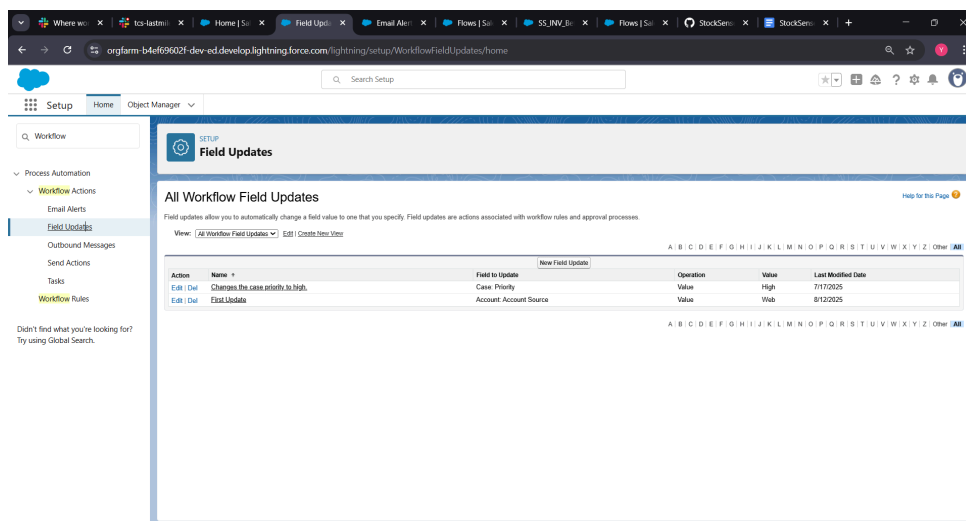


Field Updates:-

Use via Flow (preferred) or Workflow Field Update (legacy).

Example: After approval set `Status__c = 'Confirmed'`.

- In a Flow: Update Records → choose record to update (Procurement Request) → set `Status__c = 'Confirmed'`.
- If you want a Workflow Field Update (legacy): create Workflow → New Field Update → Field `Status__c = 'Confirmed'`.



Tasks:-Subject = Prepare goods for PR
{!Procurement_Request__c.Name}

OwnerId = Warehouse Manager user/role

WhatId = {!Procurement_Request__c.Id} (links task to PR)

Priority = High

Status = Not Started

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Workflow' entered. The main content area is titled 'Tasks' and shows a task named 'Prepare goods for PR (!Procurement_Request__c.Name)'. The task details are as follows:

Object	Procurement Request	Status	Not Started
Assigned To	User: Yash Thakara	Priority	High
Subject	Prepare goods for PR (!Procurement_Request__c.Name)		
Unique Name	Prepare_goods_for_PR_Procurement_Request__c_Name		
Due Date	Rule Trigger Date + 55 days		
Comments			
Created By	Yash Thakara, 9/22/2025, 9:16 AM	Modified By	Yash Thakara, 9/22/2025, 9:16 AM

Below the task details, there are sections for 'Rules Using This Task', 'Approval Processes Using This Task', and 'Entitlement Processes Using This Task', all of which are currently not used by any rules, processes, or entitlements respectively.

Custom Notifications:-

Setup → Notification Builder → Custom Notifications → New.

Name: CN_SS_Reorder_Alert_v1

Channels: check Desktop and Mobile as needed → Save.

The screenshot shows the Salesforce Setup interface for Custom Notifications. The left sidebar has a search bar with 'Notification Builder' entered. The main content area is titled 'Custom Notifications' and shows a table of custom notification types.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
CN_SS_Reorder_Alert_v1	CN_SS_Reorder_Alert_v1		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	