

# Phase 4 – Process Automation

## 1. Validation Rules

The screenshot shows the Salesforce 'Lead Validation Rule' configuration page. The left sidebar contains navigation links: 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Lead Validation Rule' with a 'Back to Lead Validation Rules' link. Below the title is a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons. The details include: Rule Name 'Lead\_Score\_Range', Active status 'Active' with a checkmark, Error Condition Formula 'AND( NOT(\$Profile.Name = "System Administrator"), ISCHANGED(Lead\_Score\_\_c) )', Error Message 'Lead Score is system-managed. Contact admin to change.', Error Location 'Lead Score', Description, Created By 'Aanya Badoniya, 9/20/2025, 12:52 AM', and Modified By 'Aanya Badoniya, 9/20/2025, 12:55 AM'. There are also 'Edit' and 'Clone' buttons at the bottom of the details section.

- **Lead Score range:** Ensures that only the system (Flows or Apex updates) or Admins can change the score field.

## 2. Workflow Rules (Not required)

*(Optional – replaced mostly by Flows)*

## 3. Process Builder (Not required)

- *Not used in this project* (Flows are the replacement).

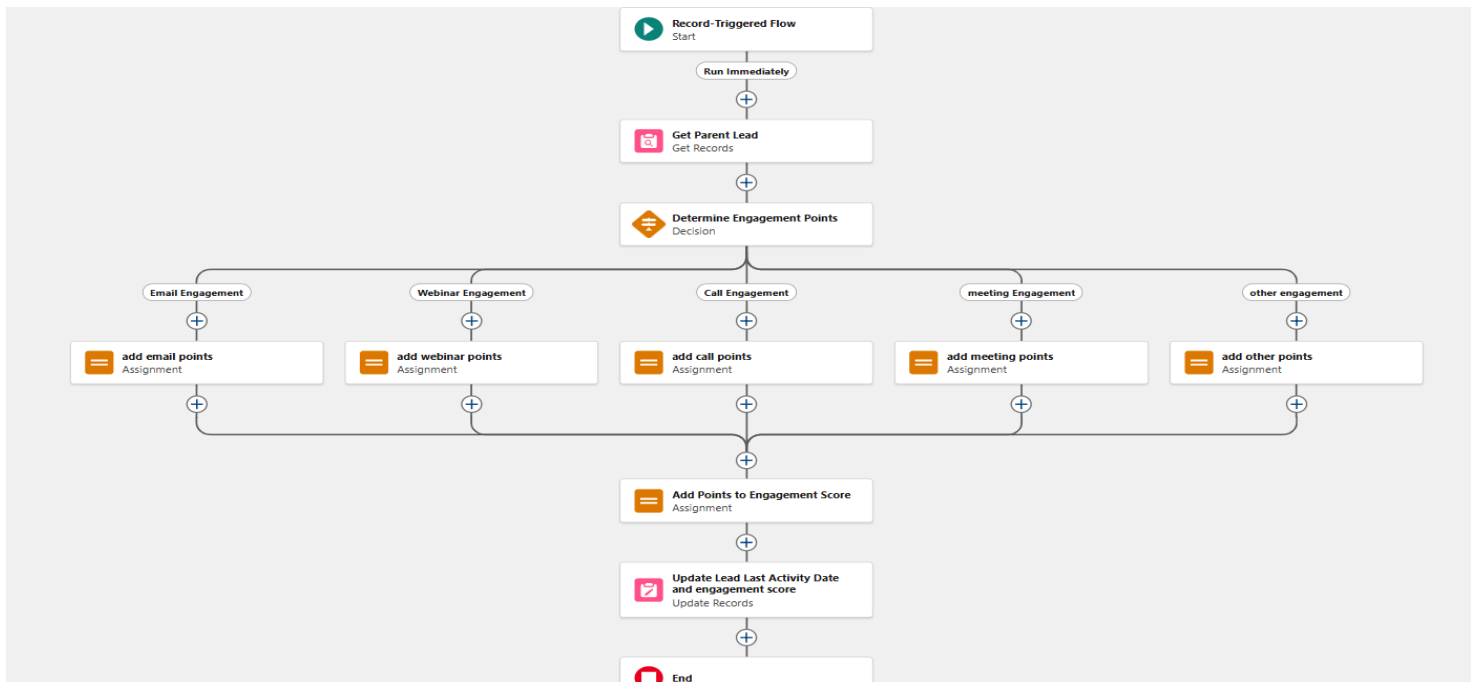
## 4. Approval Process (Not required)

- *Not required in this project but can be a future extension.*

## 5. Flow Builder

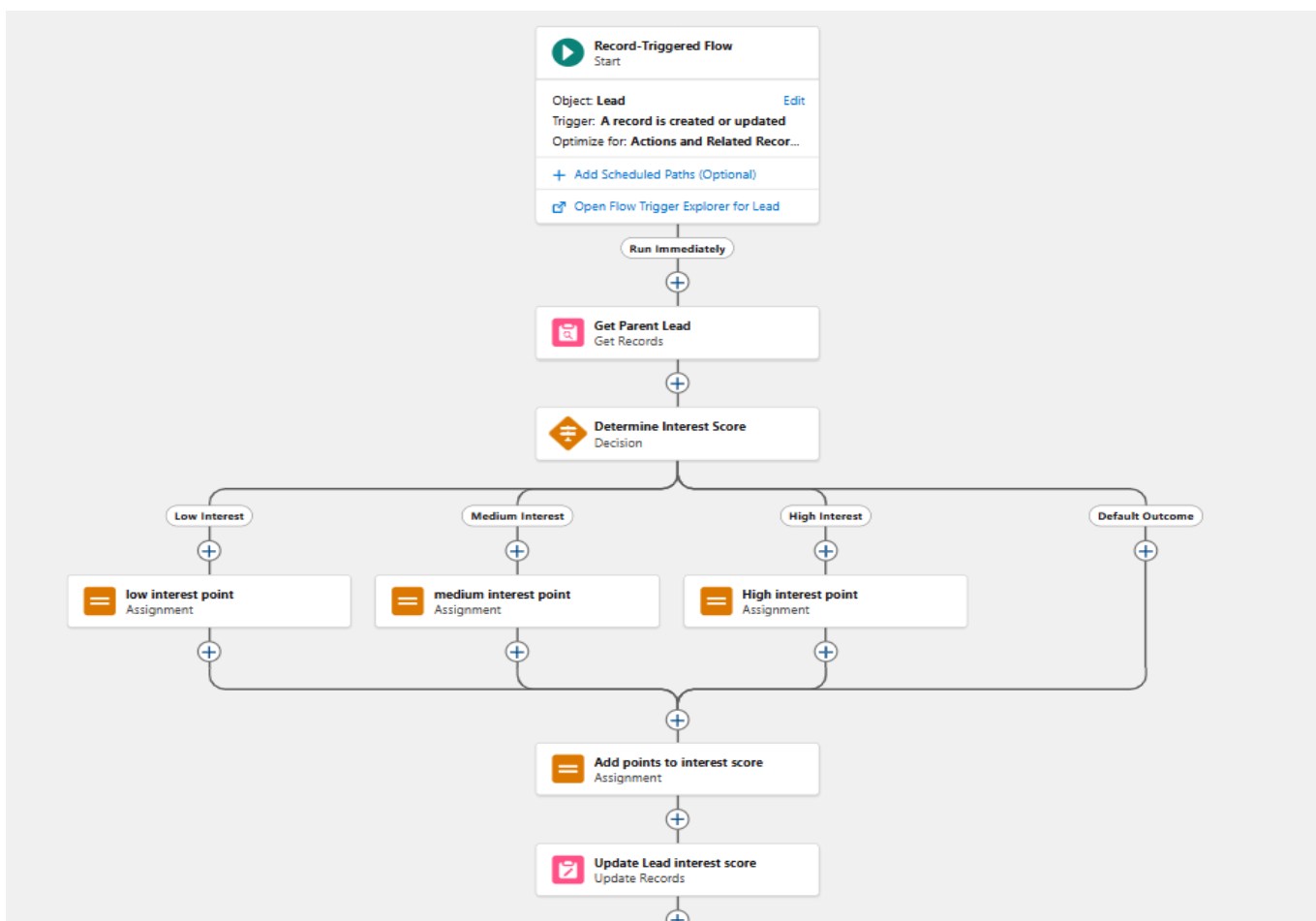
- **Engagement\_Update\_Lead\_LastActivity (Record-Triggered Flow):**
  - Runs daily.

- Updates Engagement\_Score\_\_c and lead\_lastActivity in Lead Engagement.

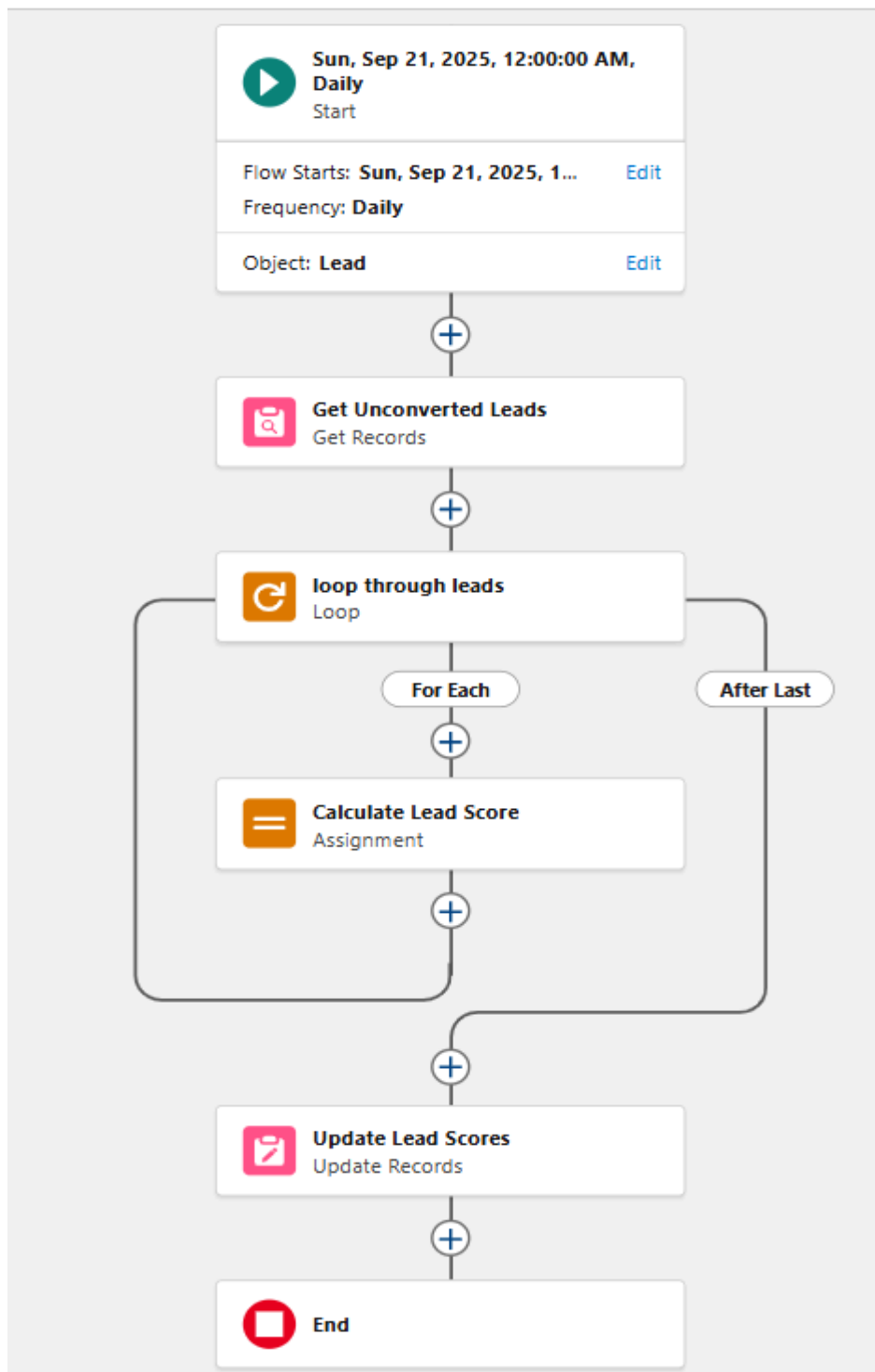


- **Interest Score Flow (Record-Trigger Flow):**

- Runs daily.
- Updates Interest\_Score\_\_c in Lead.



- **Nightly\_Lead\_Score\_Calc (Autolaunched):**




- When Engagement or Interest Score updates.
- Calculates **Lead Score = Interest Score + Engagement Score**.
- Updates Lead\_Score\_\_c field in Lead object.

## 6. Email Alerts (optional)

- It comes under workflow actions which are not required in my project

## 7. Tasks

- Automatically reminding user to follow up quickly with leads that scored high, by creating a high-priority task for you within one day of the lead being created.

 **Tasks**

Task

Follow up on High-Score Lead

Rules Using This Task (1) | Approval Processes Using This Task (0) | Entitlement Processes Using This Task (0)

Help for this Page

Workflow Task Detail

EditDeleteClone

Object	Lead	Status	Not Started
Assigned To	User : Aanya Badoniya	Priority	High
Subject	Follow up on High-Score Lead		
Unique Name	Follow_up_on_High_Score_Lead		
Due Date	Lead: Created Date + 1 days		
Comments			
Created By	Aanya Badoniya, 9/20/2025, 1:50 AM	Modified By	Aanya Badoniya, 9/20/2025, 1:50 AM

EditDeleteClone


Rules Using This Task

Rules Using This Task Help

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	HighScore_Task		Lead	<input checked="" type="checkbox"/>

## 8. Custom Notifications

- Send in-app notification to Sales Agent when high-intent lead is detected.

 **Custom Notifications**

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼
High Score Notification	High_Score_Notification		✓	✓	▼

