

Project Title: Sales Performance Reporting

Phase 4: Process Automation (Admin)

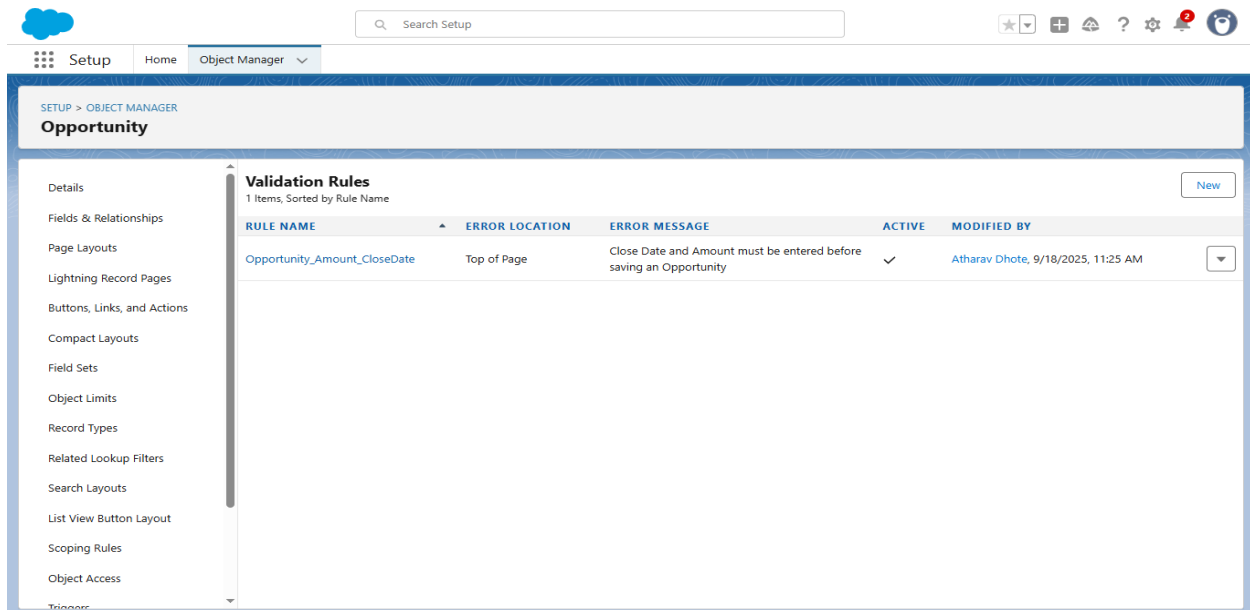
Objective:

This phase focuses on automating business processes within Salesforce to reduce manual work, enforce data quality, and provide timely notifications to sales managers and executives. By using point-and-click admin tools such as Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flow Builder, repetitive tasks are eliminated, and data consistency is maintained.

1. Validation Rules

Validation Rules ensure that only clean and complete data enters the system. For this project, a rule was implemented on the **Opportunity** object to prevent saving a record without key details.

- **Rule Name:** Opportunity_Amount_CloseDate
- **Logic:** A user cannot save an Opportunity if **Close Date** or **Amount** is blank.
- **Impact:** This enforces discipline in data entry, guaranteeing accurate reporting for revenue forecasting and dashboards.



The screenshot displays the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the Setup menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Scoping Rules, and Object Access. The main content area is titled 'Opportunity' and shows the 'Validation Rules' section. It indicates '1 Items, Sorted by Rule Name'. A table lists the validation rule 'Opportunity_Amount_CloseDate' with an error location of 'Top of Page' and an error message 'Close Date and Amount must be entered before saving an Opportunity'. The rule is active, as indicated by a checkmark in the 'ACTIVE' column. The 'MODIFIED BY' column shows 'Atharav Dhote, 9/18/2025, 11:25 AM'. A 'New' button is visible in the top right corner of the table.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Opportunity_Amount_CloseDate	Top of Page	Close Date and Amount must be entered before saving an Opportunity	✓	Atharav Dhote, 9/18/2025, 11:25 AM

2. Workflow Rules

Workflow Rules provide simple automation for field updates and notifications. A rule was created to identify **High Value Deals**:

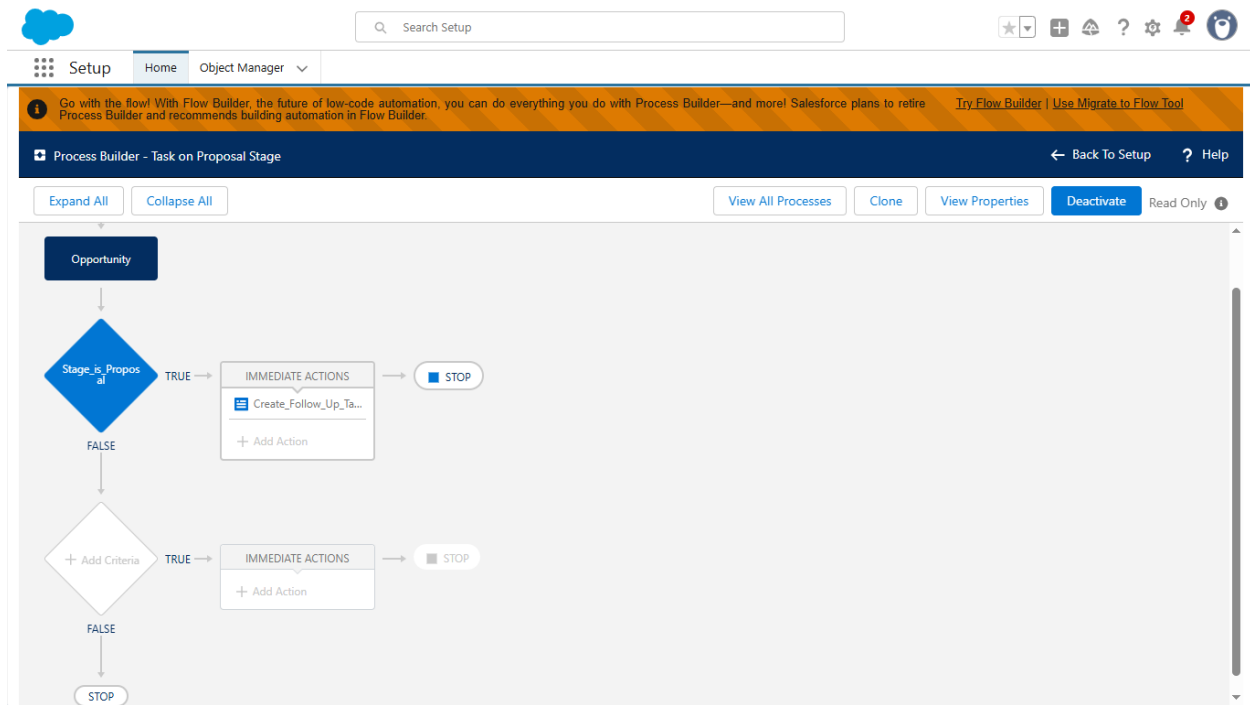
- **Rule Name:** High_Value_Deal_Flag
- **Criteria:** If Opportunity Amount > 500,000
- **Action:** Update the checkbox field **High Value Deal** = TRUE.
- **Impact:** Enables managers to easily filter and monitor large opportunities.

The screenshot displays the Salesforce Setup interface for Workflow Rules. The left sidebar shows the navigation menu with 'Workflow Rules' selected. The main content area shows the details for the 'High_Value_Deal_Flag' rule. The rule is active and has a description 'Amount > 500000'. The evaluation criteria are 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. The workflow actions include a field update 'Mark_High_Value_True'. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

3. Process Builder

Process Builder was used to automatically create tasks when Opportunities move to critical sales stages.

- **Process Name:** Task on Proposal Stage
- **Criteria:** When Opportunity Stage = Proposal/Price Quote
- **Action:** A Task is auto-assigned to the Opportunity Owner with subject *“Follow up with proposal client”*.
- **Impact:** Ensures timely follow-up and reduces missed sales opportunities.



4. Approval Process

To enforce governance on discounting, an Approval Process was configured.

- **Process Name:** Discount_Approval_Process
- **Criteria:** If Discount % > 20
- **Approver:** Sales Manager Role
- **Actions:**
 - If Approved → Stage = Approved
 - If Rejected → Stage = Rejected
- **Impact:** Prevents unauthorized discounts and ensures management visibility.

Setup | Home | Object Manager | Search Setup

Approval Processes

Process Automation | **Approval Processes**

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Approval Processes

Opportunity: Discount_Approval_Process

[Back to Approval Process List](#)

Process Definition Detail

Process Name	Discount_Approval_Process	Active	<input checked="" type="checkbox"/>
Unique Name	Discount_Approval_Process	Next Automated Approver Determined By	
Description			
Entry Criteria	Discount__c > 20	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Record Editability	Administrator ONLY		
Approval Assignment Email Template			
Initial Submitters	Opportunity Owner		
Created By	Ashley Chole	Modified By	Ashley Chole, 9/19/2025, 1:19 PM

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
Step 1	1	Step 1			User: Rahul Patel	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Mark_Accrued_Stage

Final Rejection Actions

Action	Type	Description
Record Lock		Unlock the record for editing
Field Update		Mark_Rejected_Stage

Recall Actions

5. Flow Builder

Flows provided advanced automation beyond what Workflow and Process Builder can handle.

1. Achievement % Calculation:


- Formula: $(\text{Amount} \div \text{Quota}) \times 100$
- Updates the **Achievement %** field whenever an Opportunity is created or updated.
- Provides real-time visibility of sales rep performance.








2. Automatic Task Creation:


- When an Opportunity is created, a follow-up Task is generated for the Owner.
- Improves accountability and sales discipline.

3. Closed Won Notifications:

- When an Opportunity Stage = Closed Won, a **Custom Notification** is sent to the Owner.
- Helps celebrate wins and keeps managers updated instantly.




 Setup
 Home
 Object Manager

Process Automation
 Workflow Actions
 Email Alerts

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 SETUP
Email Alerts

Email Alert
Notify Manager when Opportunity is Closed Won

[Rules Using This Email Alert \(0\)](#) |
 [Approval Processes Using This Email Alert \(0\)](#) |
 [Entitlement Processes Using This Email Alert \(0\)](#)

Edit Delete Clone

Description	Notify Manager when Opportunity is Closed Won	Email Template	Opportunity Won Notification
Unique Name	Notify_Manager_when_Opportunity_is_Closed_Won	Object	Opportunity
From Email Address	Current User's email address		
Recipients	Role, Sales Manager		
Additional Emails			
Created By	Atharav Dhote, 9/19/2025, 2:04 AM	Modified By	Atharav Dhote, 9/19/2025, 2:04 AM

Edit Delete Clone

Rules Using This Email Alert
[Rules Using This Email Alert Help ?](#)

This alert is currently not used by any rules

Approval Processes Using This Email Alert
[Approval Processes Using This Email Alert Help ?](#)

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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7. Field Updates

Field updates were used to auto-adjust values:

- Rule:** If Probability = 100, then Stage auto-updates to Closed Won.
- Impact:** Aligns system logic with the sales cycle, ensuring no manual intervention is needed.

The screenshot displays the Salesforce Setup interface for Workflow Rules. The left sidebar shows the navigation menu with 'Workflow Rules' selected. The main content area shows the details for the 'Stage_Closed_Won_Auto' rule. The rule is active and has a probability of 100. It includes a workflow action 'Update_Stage_to_Closed_Won'. A warning message states: 'You cannot add new time triggers to an active rule. Deactivate This Rule'.

Workflow Rule Detail			
Rule Name	Stage_Closed_Won_Auto		
Active	✓		
Object	Opportunity		
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria		
Description			
Rule Criteria	Probability = 100		
Created By	Atharav Dhote, 9/19/2025, 2:14 AM		Modified By: Atharav Dhote, 9/19/2025, 2:26 AM

Workflow Actions	
Type	Description
Field Update	Update_Stage_to_Closed_Won

Time-Dependent Workflow Actions [See an example](#)

⚠ You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

8. Tasks

Automated task assignments improve sales follow-through.

- A follow-up Task is automatically assigned whenever a new Opportunity is created or when it reaches the Proposal stage.
- **Impact:** Guarantees consistent customer engagement.

The screenshot displays the Salesforce Flow setup page for 'Auto Task on Opportunity Creation'. The flow is currently 'Activated'. The details section shows the following information:

Information	
Flow Label	Auto Task on Opportunity Creation
API Name	Auto_Task_on_Opportunity_Creation
Description	Record-Triggered After Save Flow
Flow Type	Record-Triggered After Save Flow
Associated Record	Segment
Created By	Atharav Dhote - 9/19/2025, 2:35 AM
Created Date	9/19/2025, 2:35 AM
Last Modified	Atharav Dhote - 9/19/2025, 2:35 AM
Last Modified Date	9/19/2025, 2:35 AM
Category	Subcategory

9. Custom Notifications

Push notifications were created for mobile and desktop Salesforce apps.

- **Notification Type:** Deal Won Notification
- **Trigger:** Stage = Closed Won
- **Recipients:** Opportunity Owner (and optionally Sales Manager).
- **Impact:** Provides real-time visibility of sales wins.



Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ * Closed Won Notification | ... ▾ * More ▾



Flow Closed Won Notification

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Type	Associated Record	Progress Status	Last Modified Date	Flow Owner
Record—Run After Save		Activated 1	9/19/2025, 3:02 AM	Atharav Dhote

Related **Details**

▼ Information

Flow Label	API Name
Closed Won Notification	Closed_Won_Notification
Description	Flow Type
	Record-Triggered After Save Flow
Associated Record	Segment
Created By	Created Date
Atharav Dhote , 9/19/2025, 2:55 AM	9/19/2025, 2:55 AM
Last Modified	Last Modified Date
Atharav Dhote , 9/19/2025, 3:02 AM	9/19/2025, 3:02 AM
Category	Subcategory

☰ To Do List