Phase 4: Process Automation (Admin)

The goal of this phase is to **automate repetitive tasks** such as lead assignment, visit scheduling, deal closure updates, and customer communication. Salesforce provides powerful admin tools like **Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flow Builder** to achieve this.

1. Validation Rules

Ensure data accuracy when agents or managers enter records.

- **Lead Object**
  - Rule: Interest Score must be between 0–100.
  - Rule: Email field must contain “@” symbol.
- **Property Object**
  - Rule: Property Price > 0 (no negative or blank entries).
  - Rule: Status cannot be “Sold” unless linked to a closed deal.
- **Booking Object**
  - Rule: Booking Amount must be > 0.
  - Rule: Agreement Date must be greater than or equal to Deal Closing Date.

2. Workflow Rules ***(legacy, but still used in simple cases)***

Basic automations triggered by field changes.

- **Deal Closure Notification**
  - Condition: When Deal Stage = “Closed Won”
  - Action: Send automated email to the customer with booking confirmation.
- **Lead Assignment Notification**
  - Condition: When Lead is assigned to a Sales Agent
  - Action: Send email to agent: “A new lead has been assigned to you.”

3. Process Builder ***(used for record updates & cross-object actions)***

- **Lead Qualification**
  - If Interest Score ≥ 70 → Update Status = “Qualified.”
  - Auto-create a follow-up task for the assigned Sales Agent.

- **Property Availability Update**
    - If a Deal is closed on a property → Update Property Status = "Sold."

4. Approval Process

Critical for real estate deals where manager approval is required.

- **Booking/Agreement Approval**
    - When a booking is submitted → send approval request to Sales Manager.
    - If Approved → Status = "Confirmed" & trigger document checklist.
    - If Rejected → Notify Sales Agent with reason.

5. Flow Builder *(modern replacement for Workflow + Process Builder)*

Salesforce Flows are the **most powerful automation tool** and can handle complex scenarios:

Screen Flows (interactive, guided forms)

- **Property Visit Scheduling Form**
    - Fields: Date, Time, Assigned Agent, Customer Name
    - Auto-create a Visit record linked to Property & Lead

Record-Triggered Flows (auto-fire on record creation/update)

- **Lead Capture Flow**
    - Trigger: New lead created from website/social form
    - Action: Assign to agent by territory + send SMS acknowledgment
- **Deal Closure Flow**
    - Trigger: Deal stage → "Closed Won"
    - Action: Auto-generate Booking record + send booking confirmation email

Scheduled Flows

- **Daily Follow-up Tasks**
    - Run every morning at 9 AM
    - Create tasks for agents to follow up with leads not updated in 3 days

Auto-Launched Flows (called from buttons/processes)

- **"Convert Lead to Deal" Button**
    - Auto-create Opportunity, Contact, and Property Visit records from a lead

6. Email Alerts & Notifications

- Send SMS/email to customers when property visits are scheduled.
- Notify sales managers when high-value deals are in negotiation.
- Send thank-you emails when deals close successfully.

7. Tasks & Reminders

- Auto-create **tasks** for agents:
  - "Call customer before scheduled visit"
  - "Send property brochure after inquiry"
- Set reminders with due dates & priority levels.

8. Custom Notifications

- Mobile push notifications to agents when:
  - New lead is assigned
  - Property visit is scheduled for them
  - Approval request is approved/rejected