Phase 4: Process Automation (Admin)

In this phase, we automated the key business processes of the Salesforce CRM using declarative tools. The goal was to reduce manual work for sales executives, service agents, and managers, while ensuring timely follow-ups, email notifications, approvals, and record updates across Admin, Development, and Community modules.

1) Validation Rules

Use: Ensure data quality before records are saved.

Implementation in Project:
- Rule on Lead: At least one of Phone or Email must be provided when the Lead Status = New.

Formula:
```
AND(
  ISPICKVAL(Status, "New"),
  ISBLANK(Phone),
  ISBLANK(Email)
)
```

Result: Prevents saving incomplete leads and ensures accurate customer data.

2) Workflow Rules

Use: Automate legacy actions like email alerts, field updates, and tasks.

Implementation in Project:
- Workflow Rule on Lead: When a Lead is created with Status = New.

Immediate Action: Trigger New Lead Email Alert.

Result: Ensures the assigned user (sales executive/counselor) is instantly notified.

3) Process Builder

Use: Automates processes with point-and-click (now replaced by Flow).

Implementation in Project:
- Auto-update a custom field (e.g., Lead Source = 'Website' if created via web form).

Result: Demonstrated automation capability but replaced by Flow for production.

4) Approval Process

Use: Standardize approvals before a record can proceed.

Implementation in Project:
- Created Approval Process for Partner Discounts or Special Price Requests.

Steps:
1. Sales Executive submits discount request.
2. Approval goes to Manager.
3. If approved → Discount applied; If rejected → Status updated as Rejected.

Result: Prevents unauthorized approvals and enforces accountability.

5) Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

Use: Modern automation tool for Salesforce.

Implementation in Project:
- Record-Triggered Flow: On Lead creation → Creates Follow-up Task.
- Auto-assignment Flow: Assigns Service Agent based on Case Category.
- Auto-launched Flow: Integrated with Email Alerts for notifications.
- Screen Flow: For guided customer/partner onboarding in Community.

Result: End-to-end automation of lead, case, and partner handling without manual steps.

6) Email Alerts

Use: Automatically notify users of key events.

Implementation in Project:
- Created Email Template (New_Record_Notification).
- Triggered Email Alert via Workflow and Flow.

Result: Users get instant notification when new leads/cases are created.

7) Field Updates

Use: Auto-update record fields.

Implementation in Project:
- Example: When Case is resolved, set Status = Closed.
- Example: When Opportunity is Won, update Stage = Closed Won.

Result: Saves time and ensures consistent data quality.

8) Tasks

Use: Assign work automatically to users.

Implementation in Project:
- Flow creates a Follow-up Task whenever a Lead is created.

Task Fields: Subject = 'Follow up: {Lead Name}', Due Date = Next Day, Owner = Lead Owner.

Result: Ensures no follow-up is missed.

9) Custom Notifications

Use: Send in-app and push notifications instead of email.

Implementation in Project:
- Configured a Custom Notification Type for 'New Lead/Case Alert'.
- Flow Action sends real-time alerts to user devices.

Result: Improved user experience with instant in-app alerts.

✅ Overall Result

Phase 4 ensured smooth automation of leads, opportunities, and cases. Sales executives and service agents are guided by system-generated tasks and notifications, managers approve critical requests, and data quality is enforced through validation rules. This automation minimized manual effort and increased productivity across Admin, Development, and Community modules.