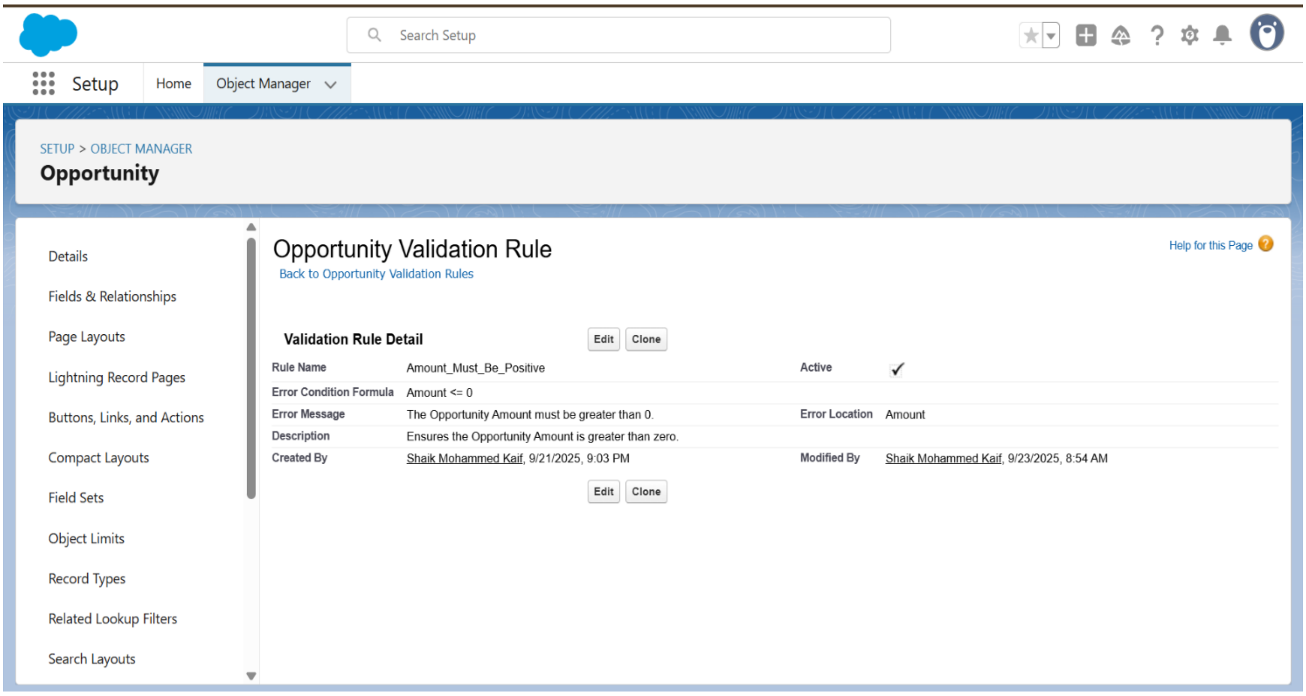
Phase 4: Process Automation (Admin)

1. Validation Rule

- **Business Problem:** Sales executives were saving Opportunities without setting a proper Amount, which caused errors in revenue reporting.
- **Solution:** Added a validation rule to ensure `Opportunity Amount > 0`.

Details:

- **Object:** Opportunity
- **Formula:**
- `OR(`
- `  ISBLANK(Amount),`
- `  Amount <= 0`
- `)`
- **Error Message:** *"Opportunity Amount must be greater than ₹0."*
- **Impact:** Prevents invalid Opportunities and ensures clean sales data.



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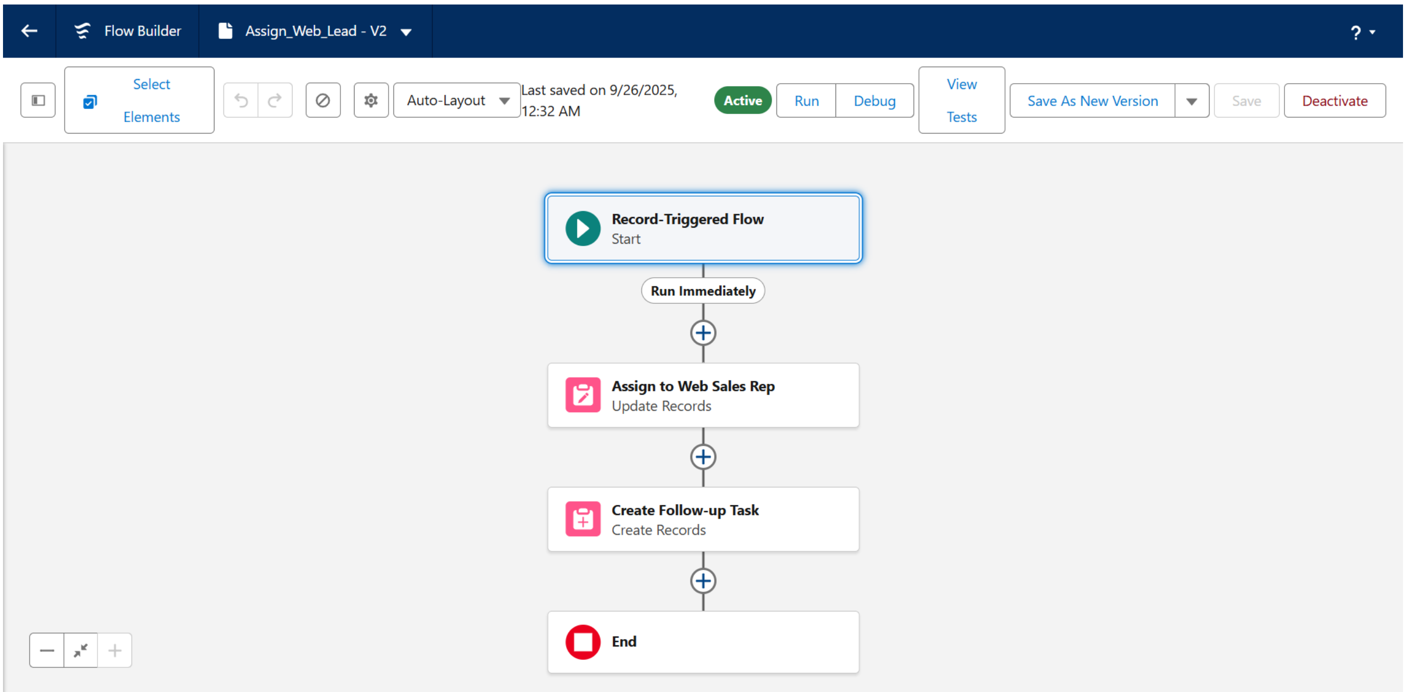
2. Lead Assignment Automation

- **Business Problem:** Leads from Website were not being assigned consistently, causing delays in follow-up.
- **Solution:** Built a **Record-Triggered Flow** to auto-assign Website leads to a specific Sales Rep.

Details:

- **Object:** Lead
- **Trigger:** When a Lead is created
- **Condition:** Lead Source = Website
- **Action:** Update OwnerId → Web Sales Rep
- **Additional Action:** Auto-create a follow-up Task for the assigned rep.
- **Impact:** Faster lead response time, no manual assignment required.

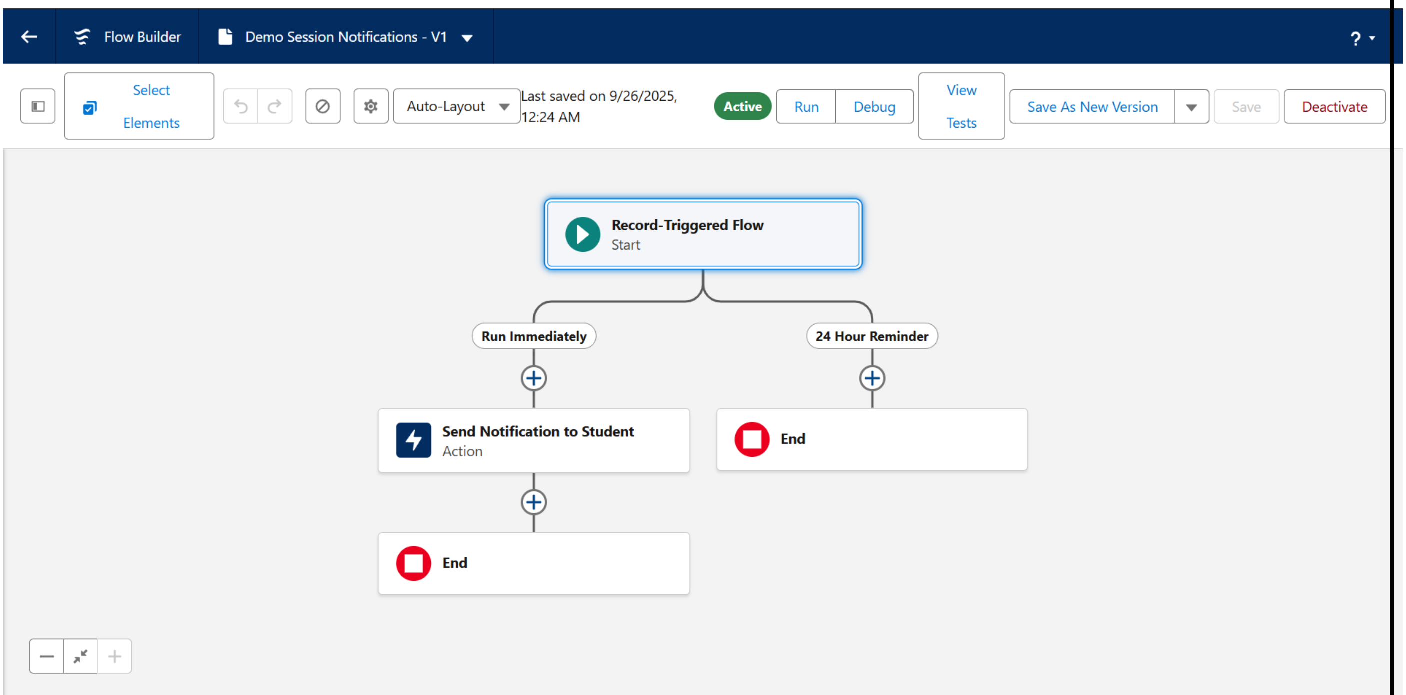


3. Demo Session Notifications

- **Business Problem:** Students often forgot about demo sessions, and sales reps were missing reminders.
- **Solution:** Created automation to send **email notifications** and **reminders**.

Details:

- **Object:** Demo Session (Custom Object)
- **Trigger:** When Status = Scheduled
- **Immediate Action:** Send Email to Student & Assigned Sales Rep
- **Scheduled Path:** 1 day before Session Date → Send Reminder Email
- **Impact:** Improved demo attendance and better rep preparation.

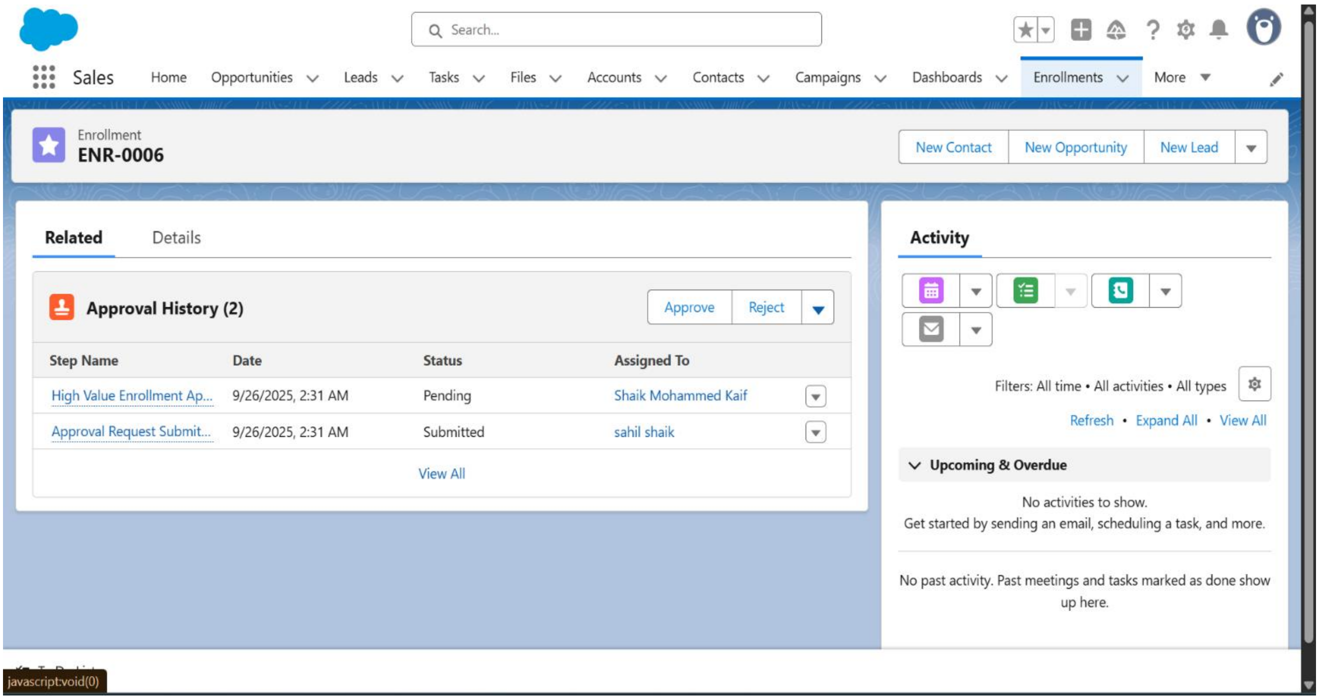


4. Approval Process for High-Value Enrollments

- **Business Problem:** Enrollments above ₹50,000 required manager approval, but there was no process to enforce it.
- **Solution:** Created an **Approval Process** on Enrollment.

Details:

- **Object:** Enrollment (Custom Object)
- **Entry Criteria:** Course Price > ₹50,000
- **Approver:** Sales Manager
- **Actions:**
  - If Approved → Enrollment Status = Approved
  - If Rejected → Enrollment Status = Rejected, Sales Rep notified
- **Impact:** Control over high-value enrollments and reduced risk of unauthorized discounts.



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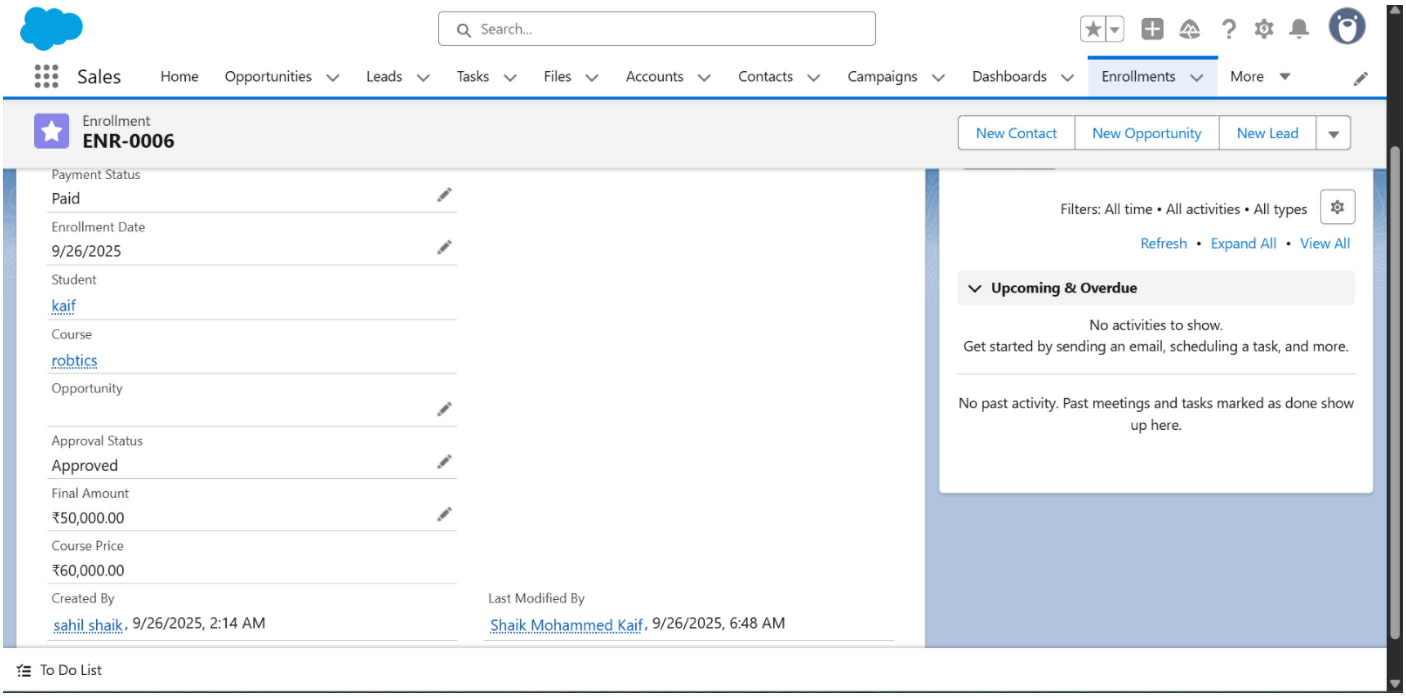

✅ Phase 4 Outcome

- Validation Rule ensures Opportunities always have valid revenue.
- Lead Assignment Flow reduces manual work and speeds up response time.
- Demo Session notifications increase attendance and efficiency.
- Approval Process enforces manager oversight for high-value enrollments.