

Phase 4: Process Automation (Admin)

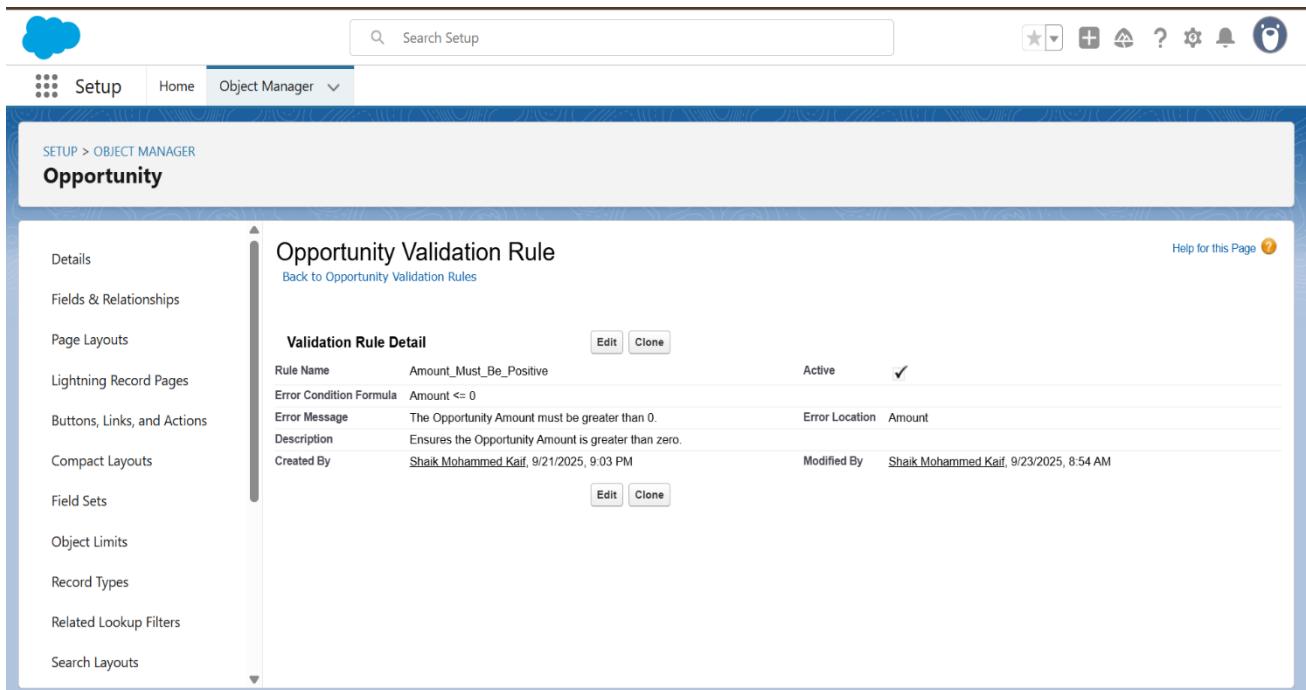
1. Validation Rule

- **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.



The screenshot shows the Salesforce Object Manager interface for the Opportunity object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays the 'Opportunity Validation Rule' configuration page. The page title is 'Opportunity Validation Rule' with a 'Back to Opportunity Validation Rules' link. The 'Validation Rule Detail' section contains the following information:

Rule Name	Amount_Must_Be_Positive	Active
Error Condition Formula	Amount <= 0	<input checked="" type="checkbox"/>
Error Message	The Opportunity Amount must be greater than 0.	Error Location
Description	Ensures the Opportunity Amount is greater than zero.	Amount
Created By	Shaik Mohammed Kaif, 9/21/2025, 9:03 PM	Modified By
		Shaik Mohammed Kaif, 9/23/2025, 8:54 AM

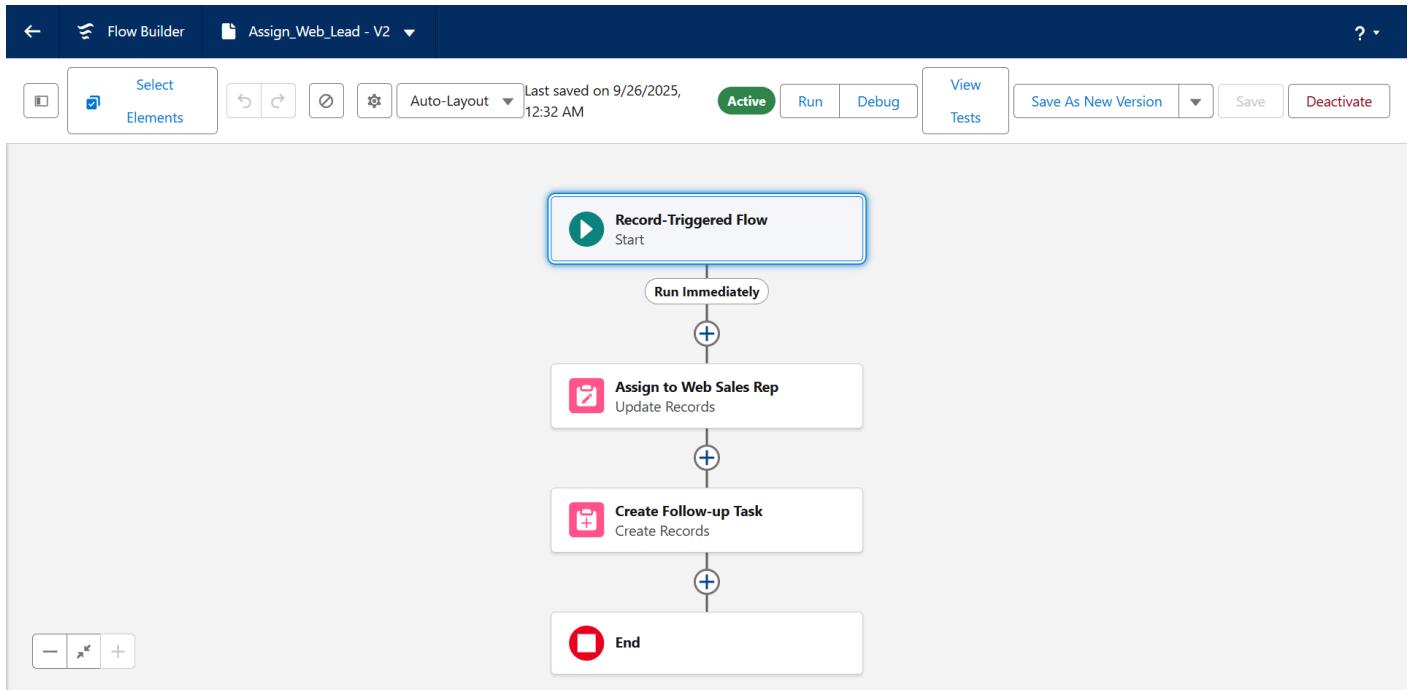
Buttons for 'Edit' and 'Clone' are located at the top right of the detail section. A 'Help for this Page' link is also present in the top right corner.

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.

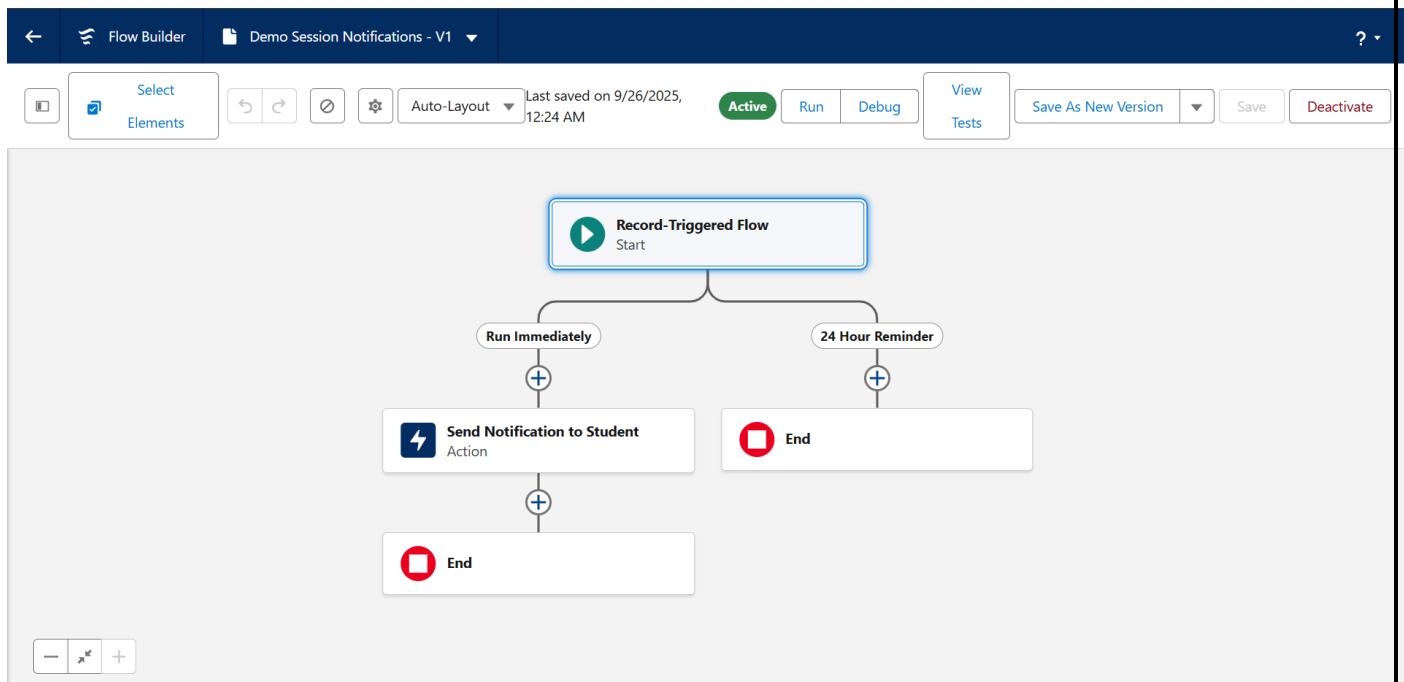


3. Demo Session Notifications

- 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.

The screenshot shows a CRM interface for an 'Enrollment' record named 'ENR-0006'. The top navigation bar includes links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Enrollments, and More. The main content area has tabs for 'Related' and 'Details'. The 'Related' tab is active, displaying the 'Approval History (2)' section. It lists two entries:

Step Name	Date	Status	Assigned To
High Value Enrollment Ap...	9/26/2025, 2:31 AM	Pending	Shaik Mohammed Kaif
Approval Request Submit...	9/26/2025, 2:31 AM	Submitted	sahil shaik

Buttons for 'Approve' and 'Reject' are visible at the top of this section. Below the table is a 'View All' link. The 'Details' tab is also present but not currently selected. To the right, there is an 'Activity' section with a header, a toolbar with various icons, and a message stating 'No activities to show. Get started by sending an email, scheduling a task, and more.' A note at the bottom says 'No past activity. Past meetings and tasks marked as done show up here.'

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The screenshot shows a CRM application interface for a sales module. At the top, there's a navigation bar with icons for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Enrollments, More, and a search bar. Below the navigation is a detailed view of an enrollment record.

Enrollment Record Details:

- Enrollment ID:** ENR-0006
- Payment Status:** Paid
- Enrollment Date:** 9/26/2025
- Student:** kaif
- Course:** robotics
- Opportunity:** (empty)
- Approval Status:** Approved
- Final Amount:** ₹50,000.00
- Course Price:** ₹60,000.00
- Created By:** sahil shaik, 9/26/2025, 2:14 AM
- Last Modified By:** Shaik Mohammed Kaif, 9/26/2025, 6:48 AM

Right Panel:

- Filters:** All time • All activities • All types
- Actions:** Refresh • Expand All • View All
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- No past activity:** Past meetings and tasks marked as done show up here.

To Do List: (empty)

✓ 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.