Phase 4: Process Automation (Admin)

In this phase, we automate different processes in Salesforce to reduce manual effort, improve accuracy, and ensure smooth reduce manual effort, improve accuracy, and ensure smooth workflow. The automation involves Validation Rules, Workflow Rules, Approval Process, and Flow Builder.

A. Validation Rule

Objective: Ensure data accuracy before saving a record.

Example: A lead must have a budget greater than 0 and a lead date that is

not in the past

1. Navigate to Setup → in Quick Find, search for Object Manager .

2. Select the object (e.g., Lead).

3. Click on Validation Rules in the left panel.

4. Click New .

5. Enter Rule Name : Lead_Date_Validation .

6. Enter Error Condition Formula :

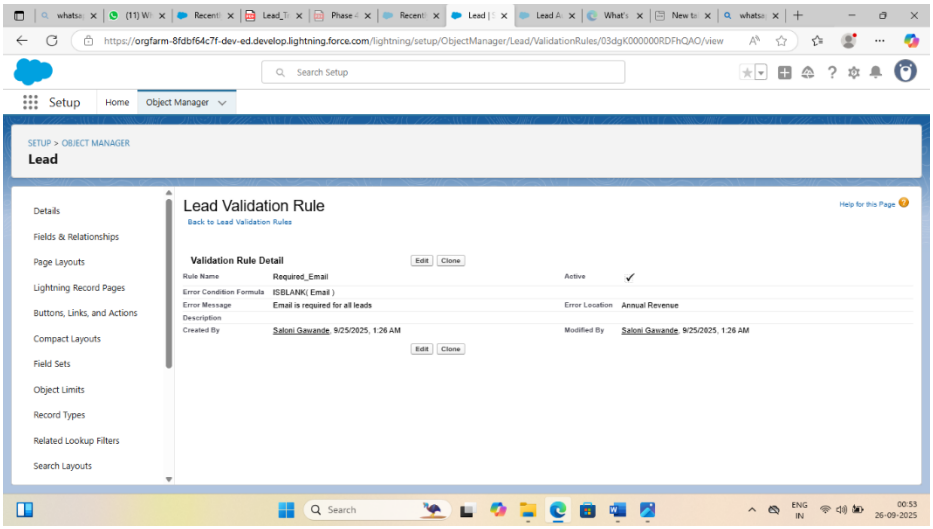
Start_Date_c__c < TODAY()

Enter Error Message :

"Lead date cannot be in the past. ."

7. Error Location → Start_Date_c

8. Click Save .



B. Workflow Rule

Objective: Automatically send a welcome email when a new lead is created.

Steps:

1. Go to Setup → in Quick Find, search for Workflow Rules .

2. Click New Rule .

3. Select Lead object.

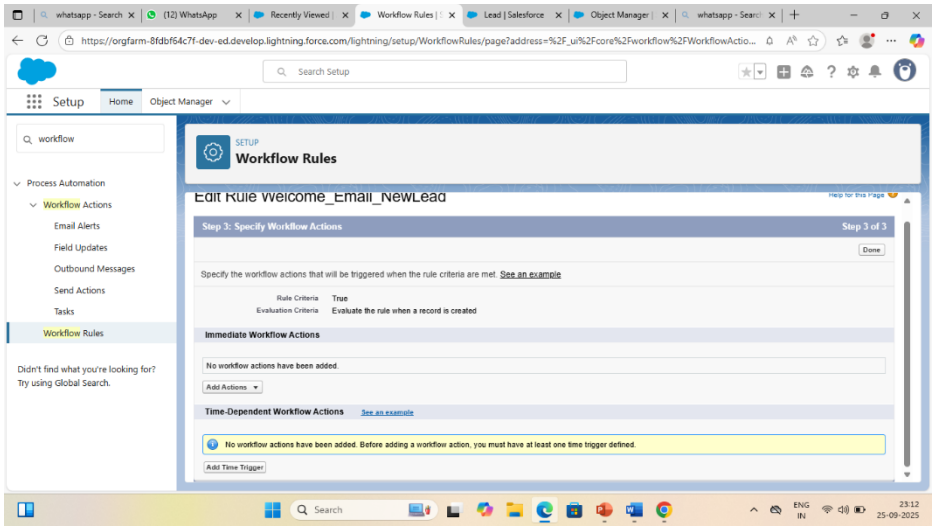
4. Enter Rule Name: Welcome_Email_NewLead .

5. Set Evaluation Criteria : Created.

6. Rule Criteria: TRUE (apply to all new leads).

7. Click Save & Next .

8. Under Immediate Workflow Actions → click Add Workflow Action → select



9. New Email Alert .

10. Create email alert:

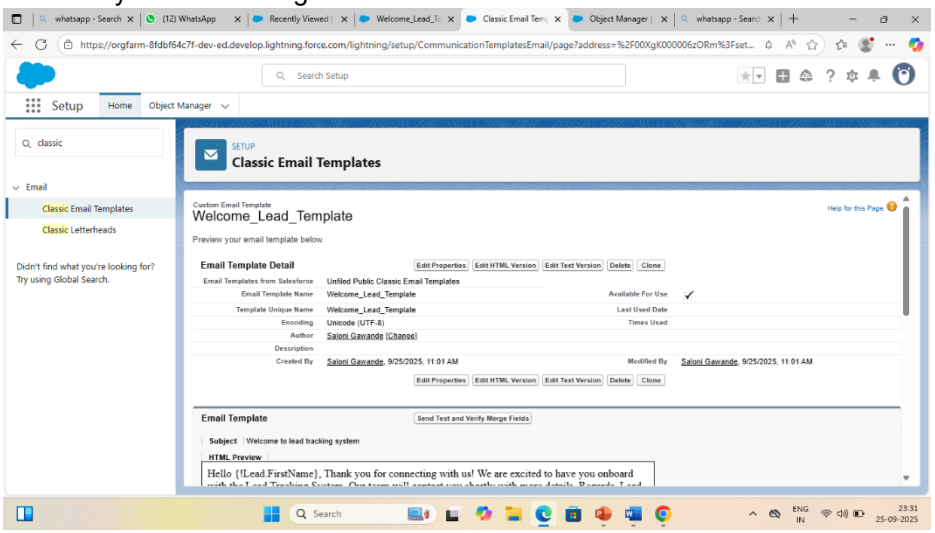
o Description: Welcome Lead Template o Select Email Template

(create one beforehand like “Welcome to Smart LeadConnect!”).

o Recipient: Lead Email .

10. Save & Activate the Workflow Rule.

Now every new lead will get an automatic welcome email.



C. Approval Process

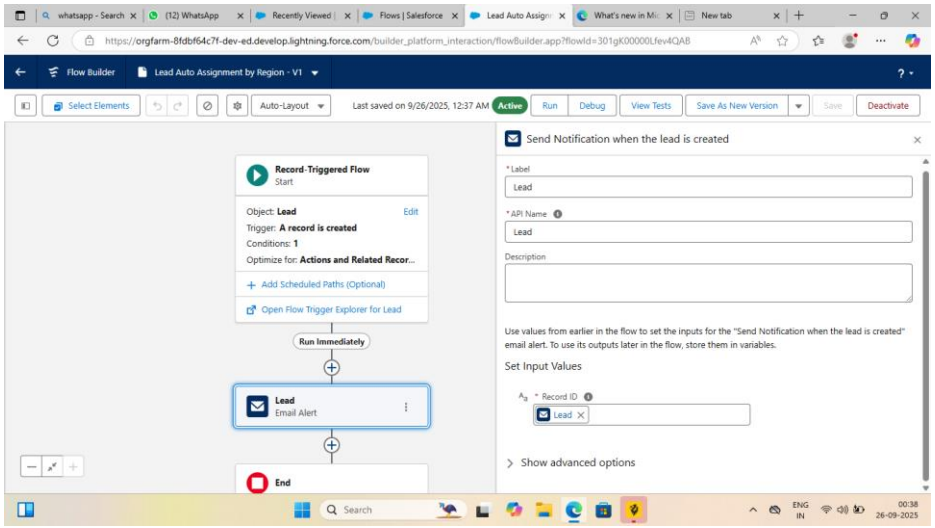
1. Go to Setup → search for Approval Processes .
2. Click New Approval Process → choose Lead object.
3. Select Use Jump Start Wizard .
4. Enter Name: High_Value_Lead_Approval .
5. Entry Criteria: Lead_Amount__c > 500000 .
6. Approver: Admin User .
7. Specify Initial Submission Actions → Lock the record.
8. Specify Final Approval Actions → Update field Status = Approved .
9. Specify Final Rejection Actions → Update field Status = Rejected .
10. Save & Activate.
11. D. Flow Builder (Automation with Flows)

Objective: Automate multiple emails.

Example Flow: Auto -assign leads based on region (pincode).

Steps:

1. Go to Setup → search for Flows .
2. Click New Flow → select Record -Triggered Flow .
3. Choose Lead object → Trigger on Create .


Flow Builder
Lead Auto Assignment by Region - V1
Select Elements
Auto-Layout
Last saved on 9/26/2025, 12:37 AM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
Run Immediately
Lead
Email Alert
End
Send Notification when the lead is created
* Label
Lead
* API Name
Lead
Description
Use values from earlier in the flow to set the inputs for the "Send Notification when the lead is created" email alert. To use its outputs later in the flow, store them in variables.
Set Input Values
* Record ID
Lead
Show advanced options
Search
ENG
IN
00:38
26-09-2025