

Lead Management & Task Tracking System

Phase 4: Automation (Workflows, Process Builder, Flows)

1. Introduction

This phase focuses on automating critical business processes in Salesforce to improve efficiency in **lead management, task assignment, and tracking**. Automation helps sales teams focus on selling rather than manual updates, reduces errors, ensures timely follow-ups, and improves reporting accuracy.

Key Objectives:

- Automate lead assignment and follow-ups.
- Ensure timely notifications for tasks and approvals.
- Reduce repetitive manual work for sales reps and managers.
- Maintain accurate lead and task data.

2. Validation Rules

Validation rules enforce data integrity. They prevent incorrect or incomplete data from being saved.

Examples:

- Lead email must be in a valid format.
- Lead phone number cannot be blank.
- Task due date cannot be in the past.

Benefits:

- Ensures clean data for reporting and analysis.
- Reduces manual errors in lead and task management.

Lead

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Lead Validation Rule

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Validation Rule Detail			
Rule Name	Lead_Source_Required	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISPICKVAL(LeadSource, "")		
Error Message	"Lead Source must be filled"	Error Location	Lead Source
Description			
Created By	Shaheen - 9/28/2025, 2:47 AM	Modified By	Shaheen - 9/28/2025, 2:47 AM

3. Workflow Rules

Workflow rules automate **simple, repetitive tasks** such as sending emails, creating tasks, or updating fields.

Examples:

- When a new lead is created → send an email alert to the assigned sales rep.
- If a lead is marked as “Hot” → create a task to call the lead within 24 hours.
- When a task is completed → update lead status to “Contacted.”

Benefits:

- Automates routine tasks.
- Improves timely engagement with leads.
- Ensures consistent sales process.

4. Process Builder

Process Builder enables **multi-step automation with conditions**. It is more advanced than Workflow Rules.

Examples:

- When a lead is converted → automatically create an opportunity and assign a follow-up task to the account manager.
- When a task is overdue → change lead priority to “High” and notify the manager.

Benefits:

- Reduces manual updates across multiple objects.
- Improves task follow-up and lead conversion efficiency.

5. Approval Process

Approval processes are optional but useful for **high-value leads or special discounts**.

Examples:

- Lead discount requests → require manager approval before applying in Salesforce.
- Opportunity approval → for deals above a certain amount, require director approval.

Benefits:

- Enforces business rules for approvals.
- Ensures accountability in decision-making.

6. Flow Builder

Flow Builder allows **more complex automation**, including screen flows, auto-launched flows, scheduled flows, and record-triggered flows.

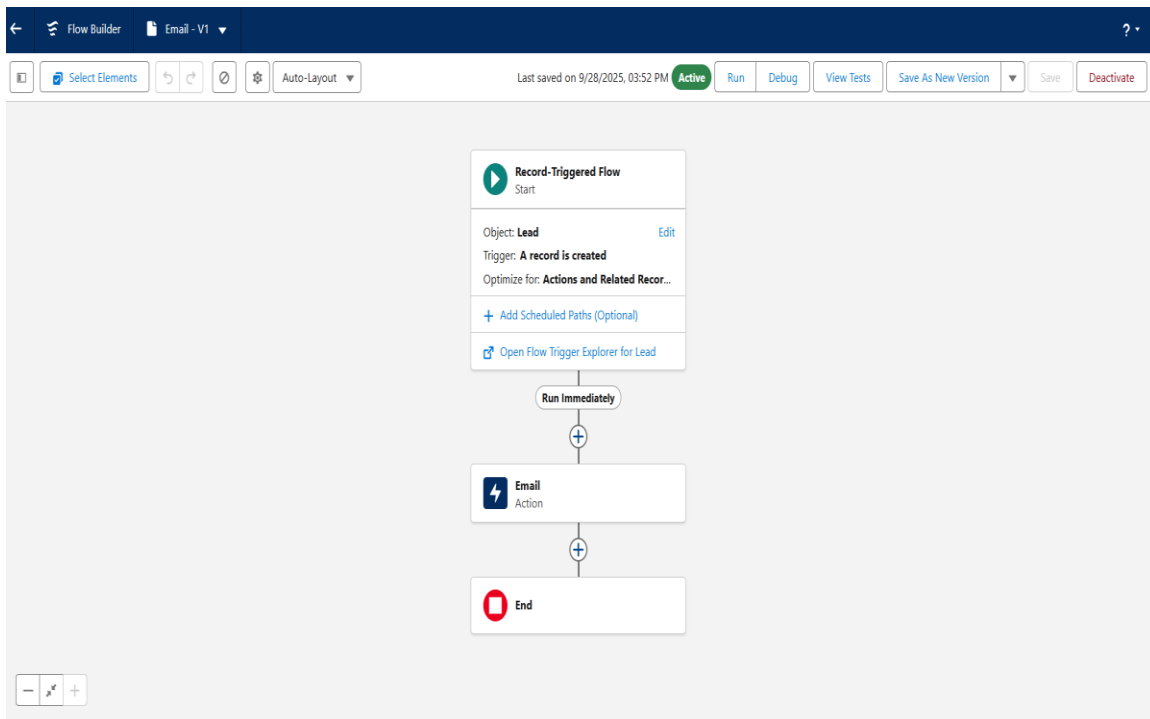
Types & Examples:

- **Screen Flow:** Guided input for adding new leads to ensure all required data is collected.
- **Record-Triggered Flow:** When a lead is updated to “Qualified,” automatically assign the next task to the sales rep.
- **Scheduled Flow:** Weekly reminders for pending follow-up tasks.

- **Auto-Launched Flow:** Automatically assign tasks to reps based on lead territory or priority.

Benefits:

- Handles complex automation scenarios.
- Ensures real-time or scheduled actions without manual intervention



7. Email Alerts

Email alerts send **automatic messages** to sales reps, managers, or leads when certain events occur.

Examples:

- Notify reps when a high-priority lead is assigned.
- Send follow-up reminders to leads after an initial contact.
- Inform managers when a lead hasn't been contacted for X days.

