Phase 4: Process Automation (Admin)

Project: Smart Property Portal – Real Estate Customer Engagement & Lead Conversion System

1. Overview of Process Automation

Process automation in Salesforce streamlines repetitive tasks, reduces manual errors, and improves efficiency. In the Smart Property Portal, automation was crucial to ensure timely lead follow-ups, accurate deal tracking, and consistent customer communications. Admin tools such as **Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flow Builder** were used extensively.

2. Validation Rules

Validation rules enforce data integrity by preventing incorrect or incomplete records from being saved. Key validation rules implemented:

- **Deal Booking Amount Validation:** Ensures booking amount is greater than zero before saving a Deal record.

- **Visit Scheduling Validation:** Prevents scheduling a visit on non-working days or outside business hours.

- **Mandatory Customer Feedback:** Forces agents to provide feedback after completing a visit.

These rules reduce data errors and maintain high-quality information for reporting and analytics.
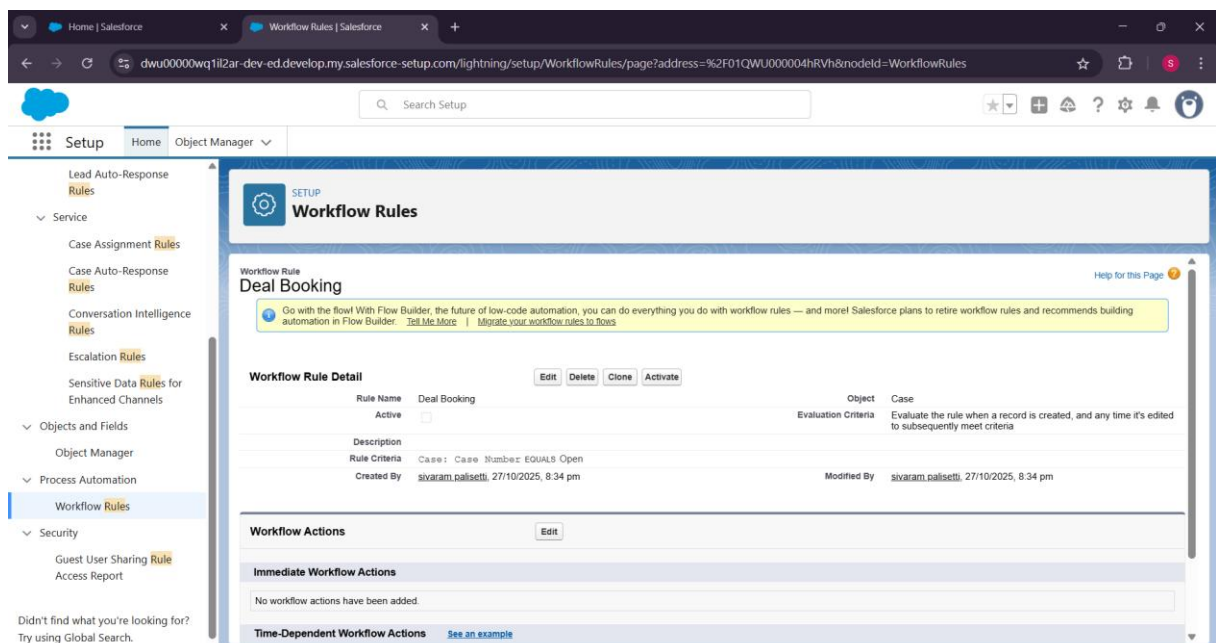
3. Workflow Rules & Process Builder

Automation was designed to trigger key actions based on events:

- **Workflow Rules:**
    - Send email notifications when a Lead is marked as Qualified.
    - Trigger task creation for follow-up calls after a visit.
- **Process Builder:**

Process Builder
Lead Conversion Automation

```
            ┌──────────────┐
            │     Lead     │
            └──────────────┘
                   │
                   ▼
              ╱─────────╲
             ╱ Status =  ╲
             ╲ Interested ╱
              ╲─────────╱
                   │
                   ▼
        ┌────────────────────────┐
        │ Create new Opportunity │
        └────────────────────────┘
                   │
                   ▼
        ┌────────────────────────┐
        │ Send Email Notification│
        │     to Sales Rep       │
        └────────────────────────┘
                   │
                   ▼
```
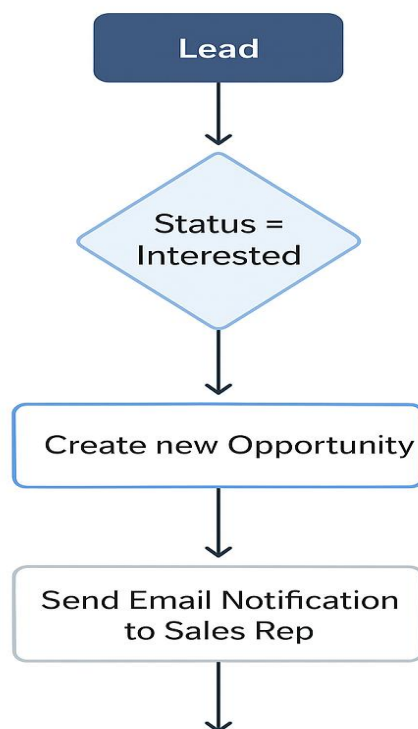
- o   Automatically assign Leads to agents based on geographic region.

- o   Update property availability when a Deal is Closed Won.

- o   Notify managers when high-value deals are created.

These automations ensure timely follow-up, reduce manual errors, and improve agent productivity.

4. Approval Processes

Approval processes ensure proper checks before critical actions are finalized:

- **Deal Closure Approval:** When an agent marks a deal as Closed Won, it triggers a manager approval process.

- **Property Listing Approval:** New property entries require admin approval before they become active.

- **Conditional Approvals:** Workflow rules can trigger escalations if approvals are delayed.

These processes maintain compliance, accuracy, and accountability in business operations.

5. Flow Builder

Salesforce **Flow Builder** provides advanced automation with both screen flows and record-triggered flows:

- **Record-Triggered Flows:** Automatically create Visit__c records when a customer requests a property tour.

- **Screen Flows:** Agents log visit feedback, update deal status, and schedule follow-ups via guided screens.

- **Flow Logic:** Includes decision elements to route visits, assignment rules, and email notifications based on criteria.

Flows enhance user experience and reduce the need for manual data entry.

[New Property Inquiry Logged]

   |

[Time Trigger: 2 Days]

   |

[Send Reminder Email to Sales Rep]

   |

[Update Inquiry Status = Contacted]

6. Summary

Phase 4 focused on automating critical processes in the Smart Property Portal:

- Implemented **validation rules** to maintain data integrity.

- Used **Workflow Rules and Process Builder** for timely lead assignment and property updates.

- Designed **Approval Processes** for deal closure and property listings to ensure compliance.

- Created **Screen and Record-Triggered Flows** for guided agent actions and visit logging.

- Configured **Email and SMS alerts** for customers and agents.

These automations reduce manual effort, improve data quality, and ensure consistent business processes across the Salesforce org.

Lead → Opportunity → Property → Client

| Process Builder: Lead Conversion

| Workflow Rule: Follow-Up Email

| Flow: Update Availability

| Approval Process: Listing Approval