Phase 4: Process Automation (Admin)

Goal

To automate repetitive tasks and approvals in the **Lead Management System**, improving efficiency and reducing manual work for sales agents and managers.

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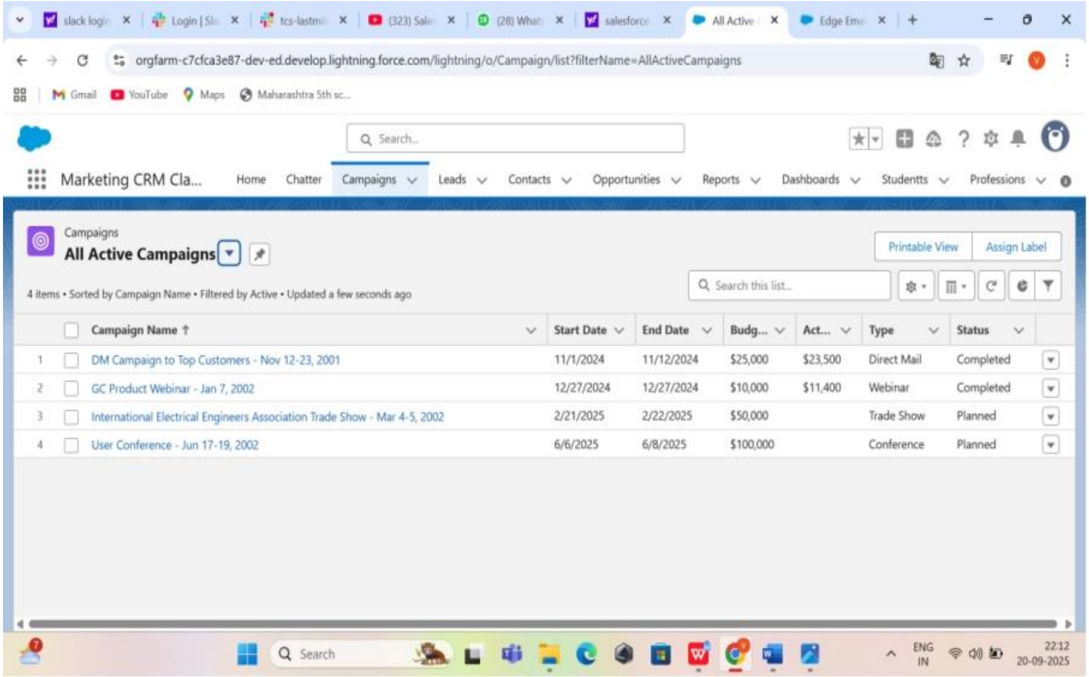
1. Validation Rules

- Ensure data accuracy by enforcing business rules.
  Examples for Lead Management:
- Lead Email must be valid.
- Lead Status cannot be changed to "Converted" unless a required field (like Company or Contact Info) is filled.
- Next Follow-up Date must be after the Lead Creation Date.
- 

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2. Workflow Rules (Legacy)

- Automatically trigger actions based on conditions (legacy tool, mostly replaced by Flow).
  Example:
- Send an email to Sales Manager when a high-priority lead is created.

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3. Process Builder (Legacy)

- Could auto-update fields or assign leads, but now **Flow Builder** is preferred.
  Example:
- Change Lead Status automatically from “New” → “Contacted” when a first follow-up task is completed.

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4. Approval Process

- Automates managerial approvals for important leads.
  Example:
- Lead with **Potential Deal Amount > ₹50,000** → automatically sent for **Manager Approval**.
- Manager approves/rejects → triggers subsequent actions like notifications or status updates.

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5. Flow Builder

- Modern Salesforce automation tool replacing Workflow and Process Builder.

Types Used:

1. **Record-Triggered Flow:**
   - Example: Automatically calculate **Lead Score** based on source, engagement, or other criteria.
2. **Screen Flow:**
   - Example: Step-by-step form for sales agents to enter lead details, assign owner, and schedule follow-up.

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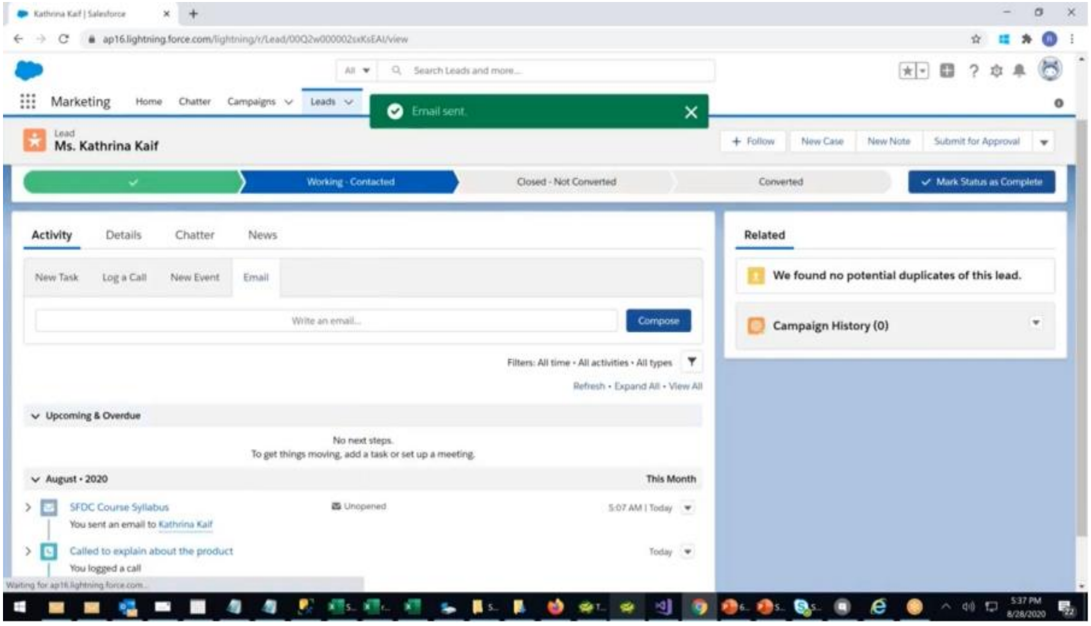
6. Email Alerts

- Automatically notify stakeholders via email.
  Examples:
- Send email to assigned Sales Agent when a new lead is created.
- Notify Manager if a high-value lead requires approval.
- Send customer acknowledgment when lead is contacted or converted.

- 

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7. Field Updates

- Automatically update fields based on actions.
  Examples:
- After Manager approval → Lead Status = "Qualified."
- After lead conversion → Opportunity Stage = "Prospecting."

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8. Tasks

- Create automatic tasks for team members to follow up or take action.
  Examples:
- Task for Sales Agent: Call the lead after creation.
- Task for Manager: Review high-value lead approval.

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9. Custom Notifications

- In-app alerts for users to ensure no task is missed.
  Examples:
- Notify Sales Agent in Salesforce when a lead is assigned.
- Notify Manager when approval is pending.