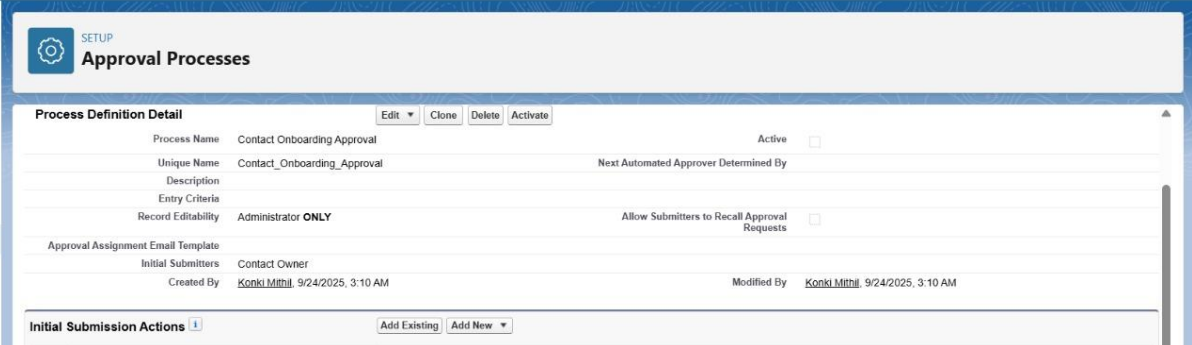


# Phase 4 – Automation & Workflows

## Approval Process Configuration

An automated approval process was implemented to manage **new contact onboarding**, ensuring data quality before customers are activated.

- **Approval Status Field:** A new picklist field (Approval\_Status\_\_c) was added to the Contact object with values: Draft, Submitted, Approved, Rejected.
- **Automated Submission:** Logic was built to automatically submit Contacts for approval when criteria are met (e.g., Contact Status = Prospect).
- **Approval Actions:** Upon approval, Contacts are automatically set to *Active*. Upon rejection, the approval status is updated accordingly, and follow-up tasks are created for the Sales Rep.



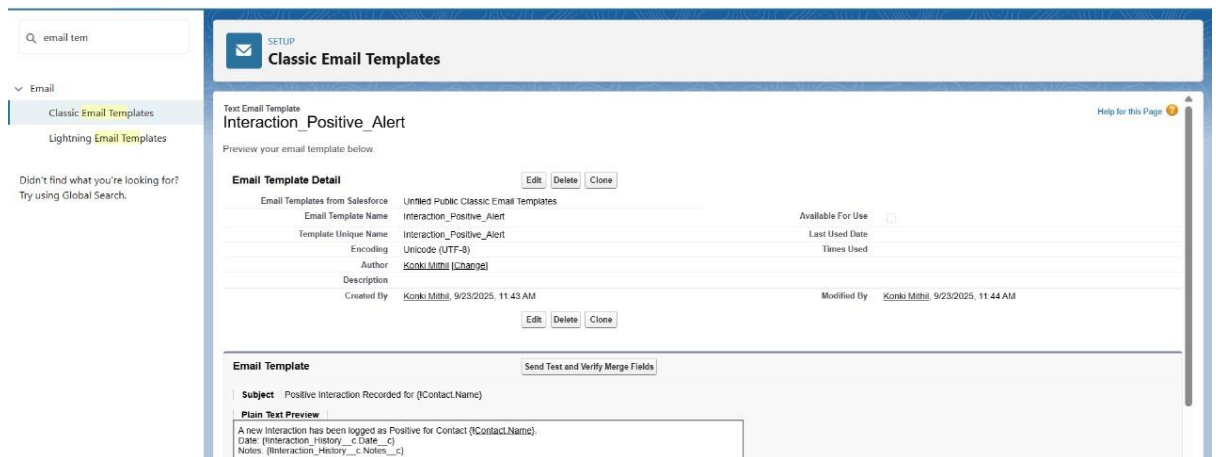
The screenshot displays the 'Approval Processes' configuration page in Salesforce Setup. The page title is 'Approval Processes' with a 'SETUP' icon. Below the title, there are buttons for 'Edit', 'Clone', 'Delete', and 'Activate'. The main section is 'Process Definition Detail' for the 'Contact Onboarding Approval' process. It includes fields for 'Process Name', 'Unique Name', 'Description', 'Entry Criteria', 'Record Editability', 'Approval Assignment Email Template', 'Initial Submitters', 'Created By', and 'Modified By'. The 'Active' checkbox is checked. The 'Next Automated Approver Determined By' field is set to 'Contact Owner'. The 'Allow Submitters to Recall Approval Requests' checkbox is unchecked. The 'Initial Submission Actions' section at the bottom has buttons for 'Add Existing' and 'Add New'.

Field	Value
Process Name	Contact Onboarding Approval
Unique Name	Contact_Onboarding_Approval
Description	
Entry Criteria	
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Contact Owner
Created By	Konki Mithal, 9/24/2025, 3:10 AM
Modified By	Konki Mithal, 9/24/2025, 3:10 AM

## Email Notification System

A comprehensive notification service was developed to keep Sales Reps and Managers informed throughout the process.

- **Follow-Up Reminders:** Automated emails are sent to Sales Reps when an Interaction History record includes a Next Follow-Up Date.
- **Approval Alerts:** Automated notifications are sent to managers when a new Contact requires their review and approval.
- **Interaction Confirmations:** Automated emails are sent to customers confirming scheduled meetings or calls.



## Scheduled Data Maintenance

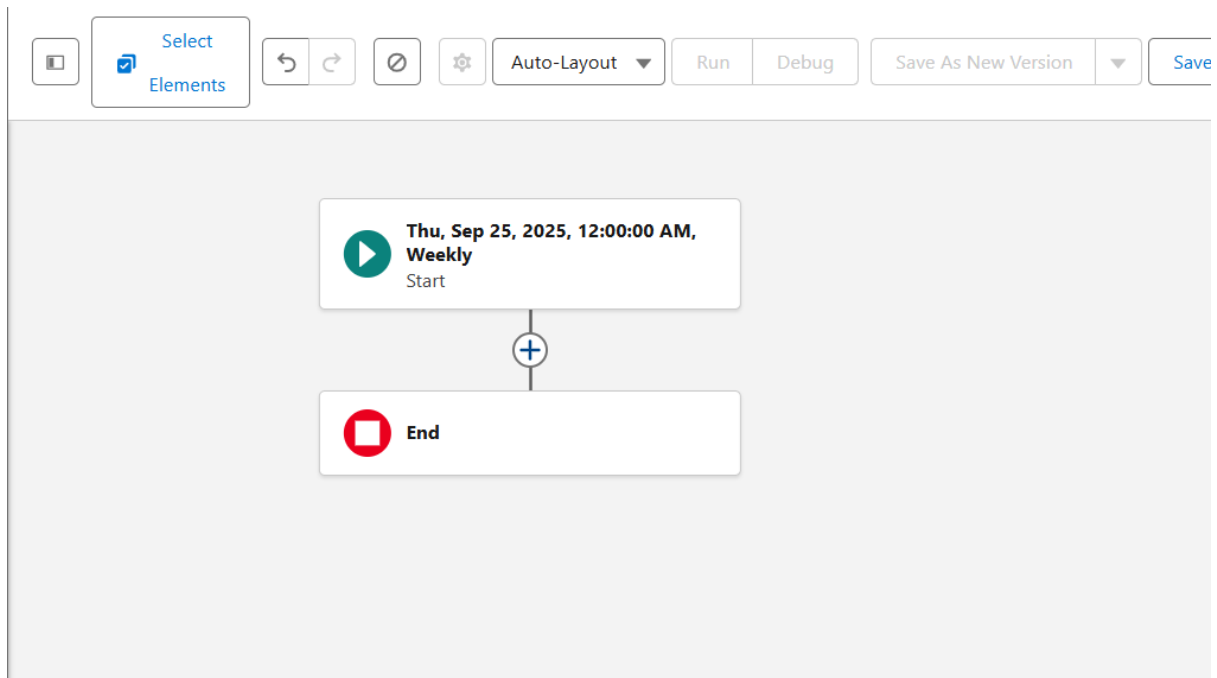
A scheduled automation process was implemented to maintain clean and accurate customer records.

- **Scheduled Flow:** A monthly flow runs to identify Contacts with no interactions in the last 12 months.
- **Automated Updates:** These Contacts are flagged as *Dormant* and follow-up tasks are assigned to the Contact Owner.
- **Completion Notification:** An email is sent to the system administrator with the list of updated/dormant Contacts.

## Contact Assignment Flow

A declarative automation flow was created to streamline assignment of new Contacts.


- **Flow Definition:** A record-triggered flow (Contact\_Assignment\_Flow) was created to trigger upon new Contact creation.
- **Territory Logic:** The flow incorporates region or industry logic so Contacts are routed to the correct Sales Rep.
- **Task Creation:** A “Welcome Call” task is automatically created for the assigned Sales Rep.



## **Data Validation & Triggers**

Robust validation rules and triggers were implemented to enforce data integrity and automate processes.

- **Email Validation:** A rule ensures Contact emails are valid (must contain “@” and domain format).
- **Mandatory Fields:** Phone, Email, and Source must be provided before saving a Contact.
- **Interaction Validation:** A trigger prevents Interaction History records from being created without an Outcome and Date.
- **Process Automation:** Triggers and Flows automatically handle approvals, reminders, and updates.



SETUP

Email Alerts

Email Alert

Notify Manager when Interaction Outcome is Positive

[Rules Using This Email Alert \(0\)](#) | 
 [Approval Processes Using This Email Alert \(0\)](#) | 
 [Entitlement Processes Using This Email Alert \(0\)](#)

Help for this Page

Email Alert Detail

Edit

Delete

Clone

Description	Notify Manager when Interaction Outcome is Positive	Email Template	Sales: New Customer Email
Unique Name	Notify_Manager_when_Interaction_Outcome_Is_Positive	Object	Interaction History
From Email Address	Current User's email address		
Recipients	Role: Sales Manager		
Additional Emails	projectmanager@company.com		
Created By	Konki Mithil	Modified By	Konki Mithil
	9/24/2025, 2:46 AM		

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
-----------	---------	-------------	--------	--------

## Next Steps: Phase 5

With the core automation and business logic complete, the next phase will focus on the user interface and experience:

- **Lightning Web Components (LWC):** Build a custom Interaction Timeline component for an enhanced view of customer engagement.
- **Experience Cloud:** Configure a customer portal so customers can update their details and view interaction history.
- **Mobile Optimization:** Ensure the Contact Management System is fully functional on Salesforce Mobile.
- **Dashboards & Analytics:** Develop executive dashboards for customer engagement and follow-up efficiency.