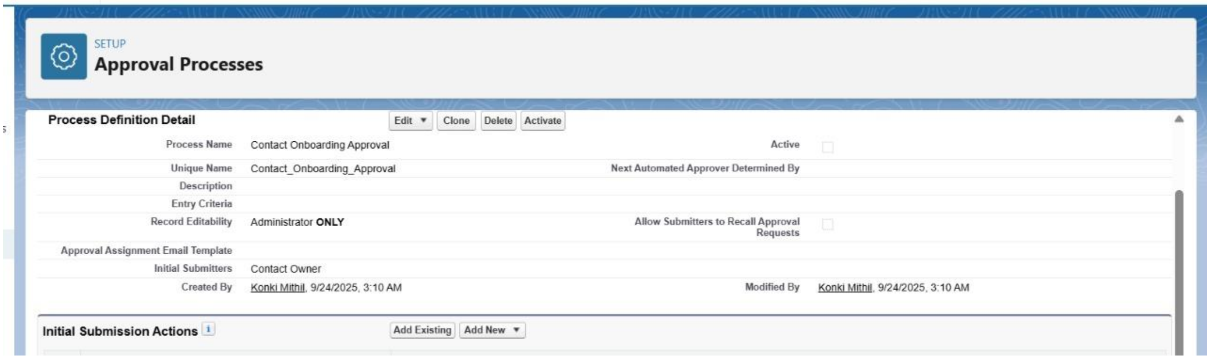
Phase 4 – Automation & Workflows

Approval Process Configuration

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

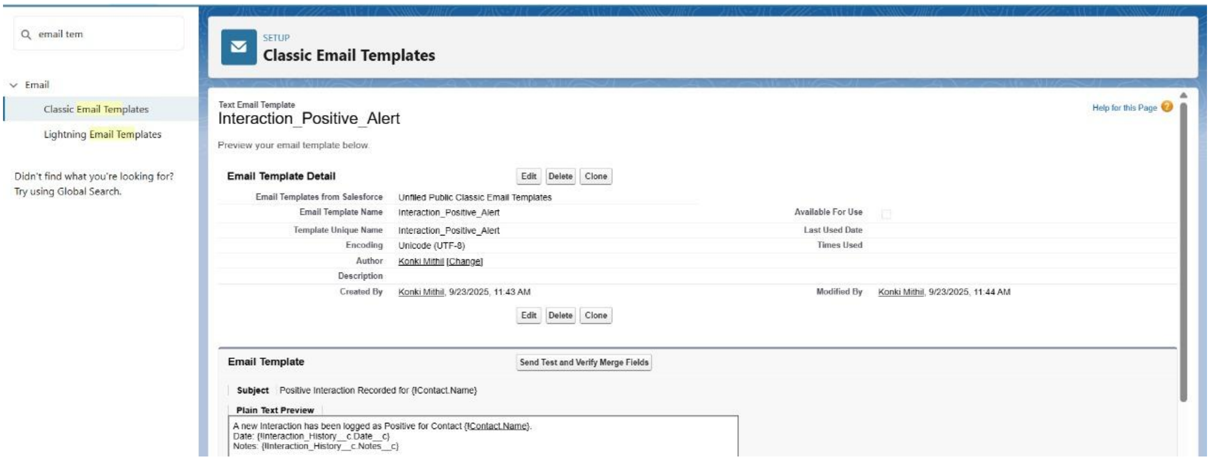
- **Approval Status Field:** A new picklist field (`Approval_Status__c`) was added to the Contact object with values: Draft, Submitted, Approved, Rejected.
- **Automated Submission:** Logic was built to automatically submit Contacts for approval when criteria are met (e.g., Contact Status = Prospect).
- **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.



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

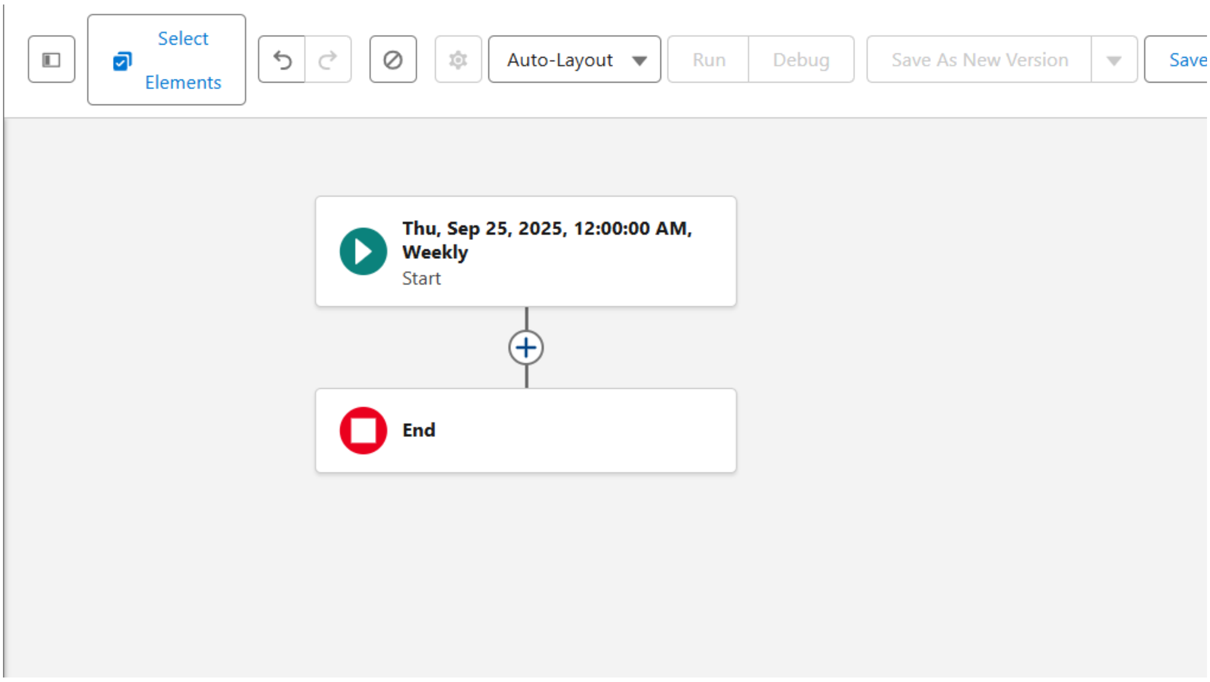
A scheduled automation process was implemented to maintain clean and accurate customer records.

- **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.

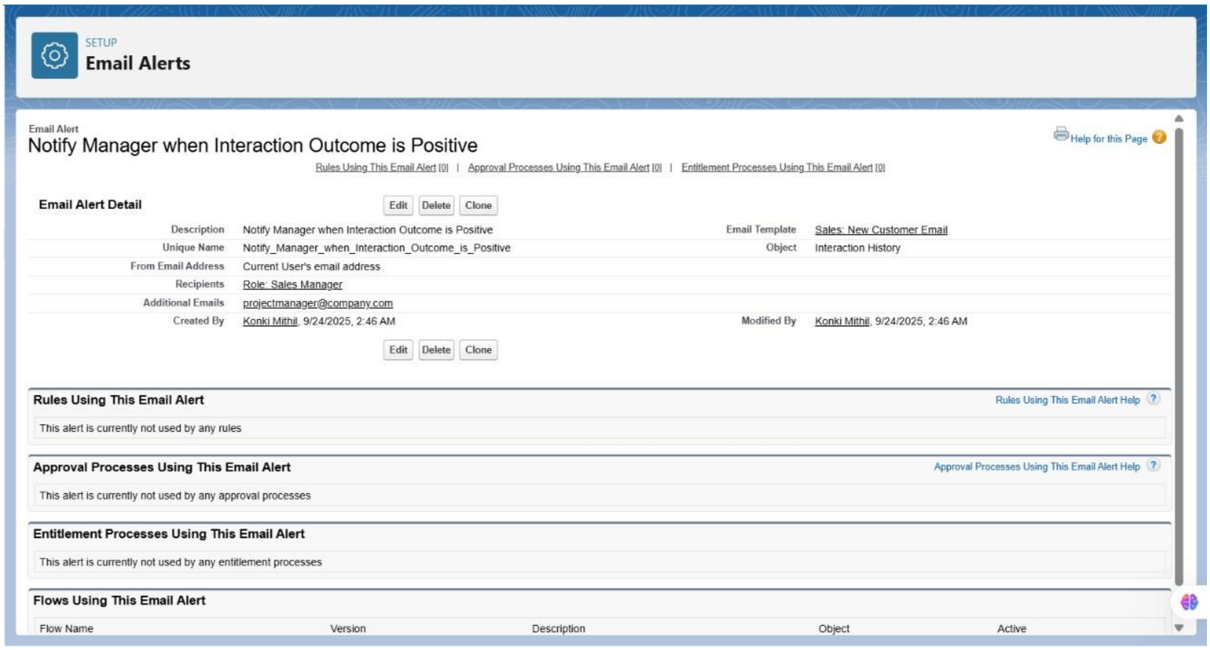
- **Flow Definition:** A record-triggered flow (`Contact_Assignment_Flow`) was created to trigger upon new Contact creation.
- **Territory Logic:** The flow incorporates region or industry logic so Contacts are routed to the correct Sales Rep.
- **Task Creation:** A "Welcome Call" task is automatically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



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.