

Phase 4: Process Automation (Admin)

Objective:

Enable business users and admins to automate workflows without coding, ensuring efficiency and accuracy.

Key Topics:

- **Workflow Rules:**

- Example: Send an email alert when an opportunity is closed.

- **Process Builder:**

- Example: Automatically update Account status when a related Case is closed.

- **Approval Processes:**

- Example: Multi-level approval for discounts > 20%.

- **Flow Builder (Modern Automation Tool):**

- **Record-Triggered Flow:** Auto-create a Task when a new Lead is added.
- **Screen Flow:** A wizard to collect customer feedback.
- **Scheduled Flow:** Auto-send reminders weekly.
- **Autolaunched Flow:** Used behind buttons or APIs.

Deliverables:

- ✓ Lead assignment flow
- ✓ Discount approval process
- ✓ Auto notifications for SLA breaches
- ✓ Documentation with flow diagrams