

# Phase 4: Process Automation (Admin)

## Introduction

Process automation is a critical component of Salesforce that allows admins and business users to streamline repetitive tasks, enforce business rules, and ensure operational efficiency—all without writing code. In Phase 4 of the ApexHub project, we focus on leveraging Salesforce declarative automation tools to reduce manual effort, minimize errors, and improve workflow efficiency.

By automating routine processes, the team ensures that data consistency is maintained, tasks are executed on time, and critical business processes such as approvals, notifications, and assignments are handled automatically.

## Objectives

1. Enable business users and admins to automate workflows efficiently.
2. Implement declarative automation tools including Workflow Rules, Process Builder, Approval Processes, and Flows.
3. Reduce manual interventions and ensure accuracy of business processes.
4. Provide documentation and visual flow diagrams for easy understanding and maintenance.

## Activities

### 1. Workflow Rules

- **Purpose:** Automate simple, repetitive processes like sending emails, updating fields, or creating tasks based on record changes.
- **Example:** Send an email alert to the sales team when an Opportunity is marked as “Closed Won.”
- **Steps Taken:**
  - Defined criteria for triggering the workflow (e.g., Opportunity Stage = Closed Won).
  - Configured immediate actions (email alerts, field updates).
  - Tested workflow execution with sample records to ensure accuracy.

## Edit Rule Act-On Lead Score Email Alert

[Help for this Page](#) ?

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Save

Cancel

**Edit Rule**

= Required Information

Object

Lead

Rule Name

Act-On Lead Score Err

Description

Send an email alert when a lead's Act-On lead score reaches a certain number.

**Evaluation Criteria**

Evaluate the rule when a record is:

☐ created

☐ created, and every time it's edited

☒ created, and any time it's edited to subsequently meet criteria [i](#)

How do I choose?

**Rule Criteria**

Run this rule if the following

criteria are met

:

Field	Operator	Value	
Lead: Act-On Lead Score	greater or equal	50	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Save

Cancel

## 2. Process Builder

- **Purpose:** Automate more complex, multi-step processes that may involve multiple objects.
- **Example:** Automatically update the Account status to “Active” when a related Case is closed.
- **Steps Taken:**
  - Defined the object and trigger criteria.
  - Created multiple actions such as updating related records or sending notifications.
  - Verified process execution across related objects.

Email Template Edit

Save

Save & New

Cancel

Email Template Information

= Required Information

Folder

Unfiled Public Email Templates

Available For Use

☒

Email Template Name

Act-On Lead Score

Template Unique Name

Act\_On\_Lead\_Score

i

Encoding

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description

Email that sends when 'Act-On Lead Score Email Alert' workflow

Subject

New qualified lead!

Email Body

{!Lead.Name} now has an Act-On lead score of

{!Lead.Act\_On\_Lead\_Score\_\_c}.

{!Lead.Link}

Save

Save & New

Cancel

### 3. Approval Processes

- **Purpose:** Implement structured, multi-level approval mechanisms for business decisions.
- **Example:** A discount approval process requiring manager approval for discounts greater than 20%.
- **Steps Taken:**
  - Defined entry criteria for the approval process.
  - Configured approval steps with designated approvers.
  - Tested escalation rules and final approval actions.

Manage Approval Processes For:

Opportunity

inactive approval processes for **Opportunities** is displayed below. To create a new approval process, click Create New Approval P

approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Use Jump Start Wizard

Use Standard Setup Wizard

### Approval Process Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name

Unique Name  Use Approver Field of Opportunity Owner

Approval Assignment Email Template

Add the Submit for Approval button and Approval History related list to all Opportunity page layouts ☒ ?

### Specify Entry Criteria

Use this approval process if the following  :

Field	Operator	Value	
Opportunity Amount	greater than	500000	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

### Select Approver

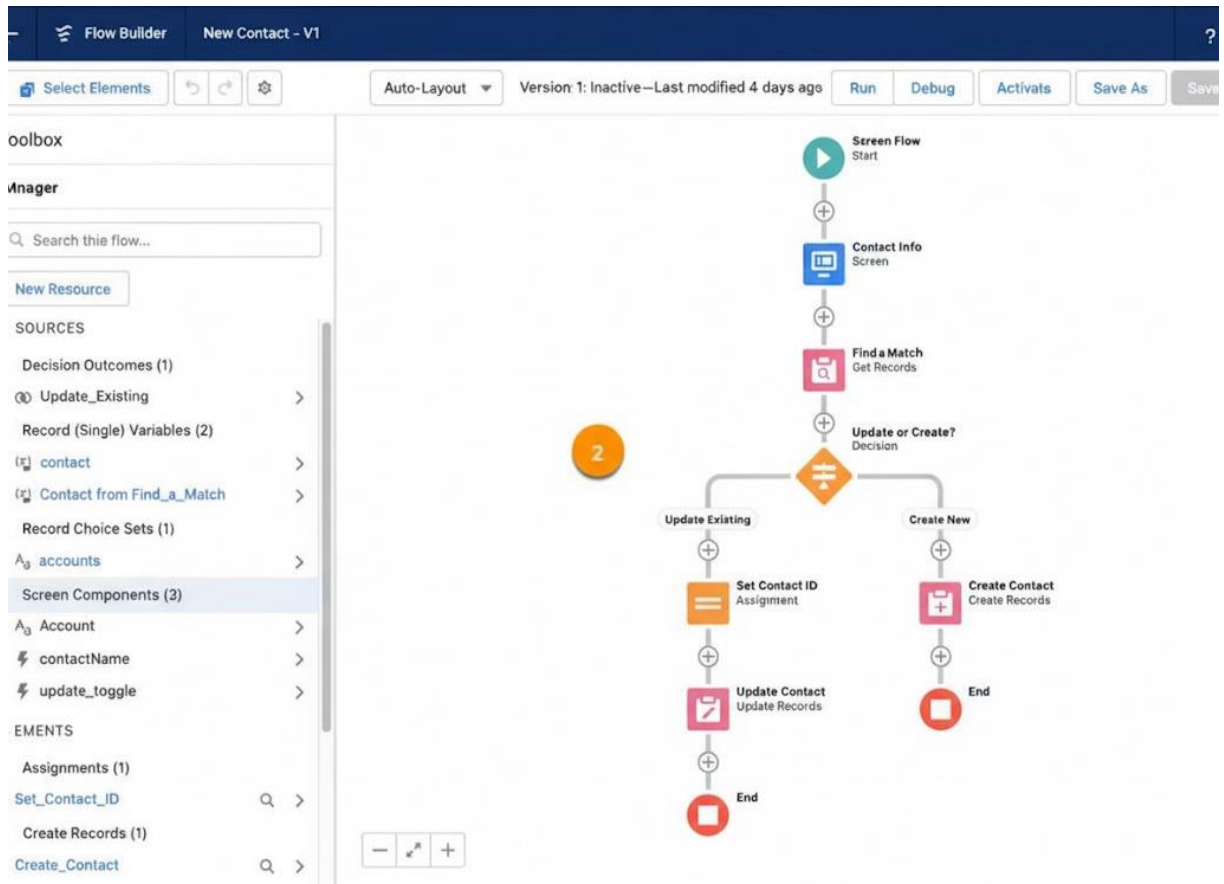
Using the options below, specify the user to whom the request should be assigned.

Description	Lock times
Lock the record	Record Lock

## 4. Flow Builder (Modern Automation Tool)

- **Purpose:** Salesforce Flow is the most versatile automation tool, supporting real-time, scheduled, and screen-based processes.
- **Types & Examples:**
  - **Record-Triggered Flow:** Automatically create a Task when a new Lead is added.
  - **Screen Flow:** Create a wizard to collect customer feedback during service calls.
  - **Scheduled Flow:** Send weekly SLA breach reminders to the team.
  - **Autolaunched Flow:** Execute automation from buttons, APIs, or Process Builder triggers.

- **Steps Taken:**
  - Designed flows using drag-and-drop interface.
  - Tested each flow using sample records to ensure correct execution.
  - Documented flow logic with diagrams for future reference.



## Deliverables

1. **Lead Assignment Flow** – Automatically assigns new leads to the appropriate sales representative based on predefined criteria.
2. **Discount Approval Process** – Multi-level approval workflow for discount requests above a certain threshold.
3. **Auto Notifications for SLA Breaches** – Sends automated email notifications when service requests exceed SLA timelines.
4. **Documentation with Flow Diagrams** – Visual representation of workflows, processes, and approvals for easy understanding and maintenance.

## **Expected Outcomes**

- Business processes are automated, reducing manual errors.
- Teams can respond faster to critical events (e.g., lead assignments, SLA breaches).
- Admins and users can maintain and update processes without relying on code.
- Complete visual documentation ensures easy handover and scalability for future enhancements.