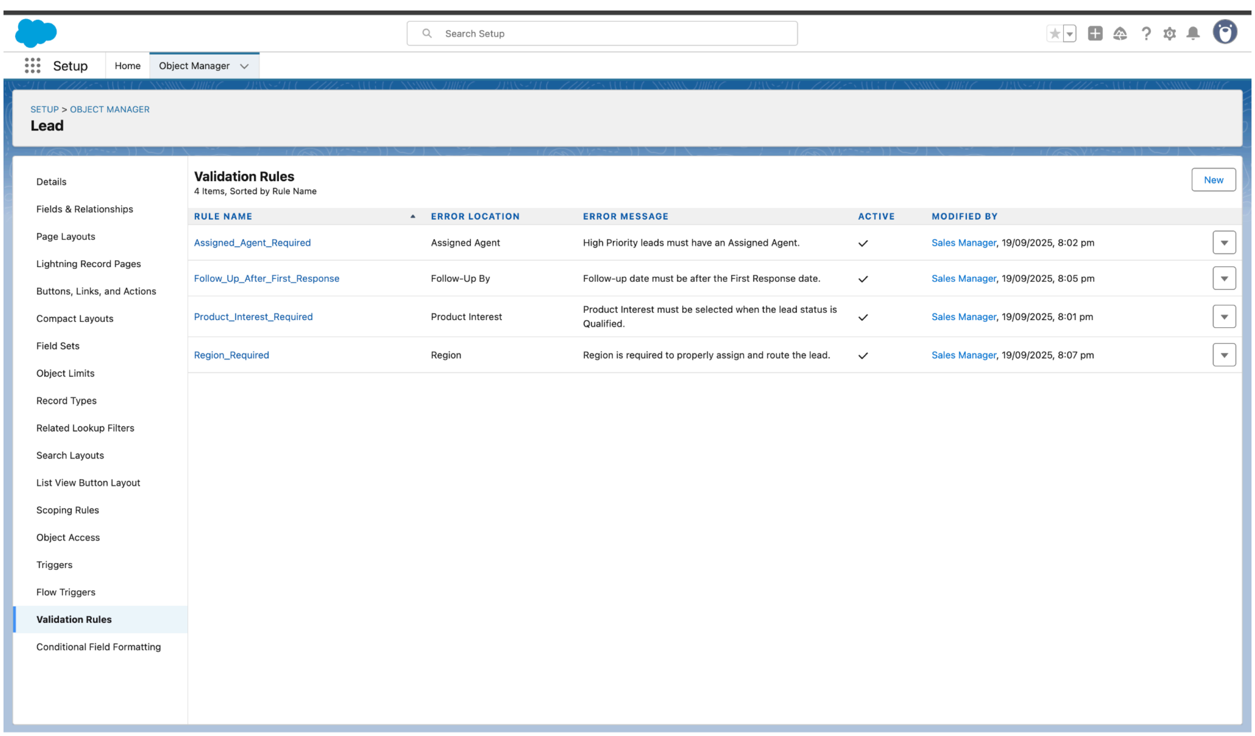
Phase 4 Report

Salesforce Automation Documentation

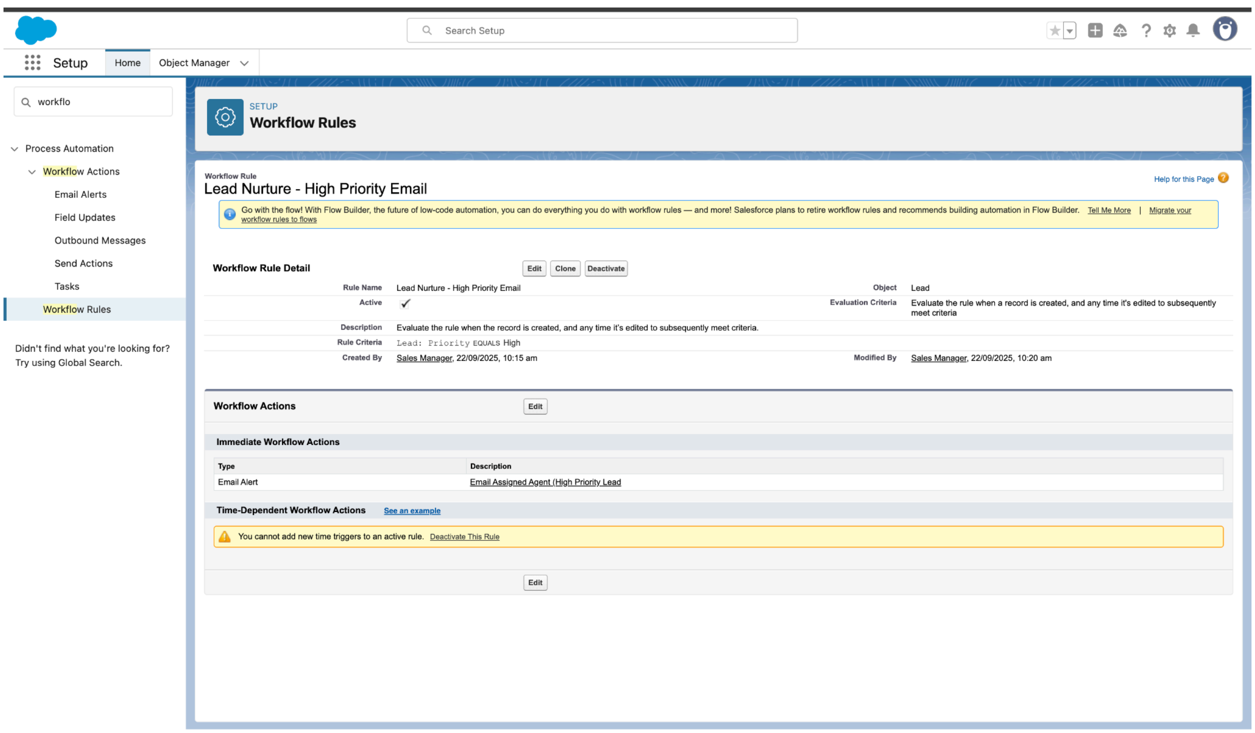
1. Validation Rules

Use Case:
Validation Rules were implemented to enforce data integrity on the Lead object. A specific rule was configured to prevent sales agents from creating follow-up tasks on Leads that have not been properly qualified. The rule checks if the Lead Status field is a value other than "Qualified" and, if true, prevents the record from being saved, displaying a custom error message to guide the user. This ensures that the sales team only invests time in Leads that meet the minimum qualification criteria.



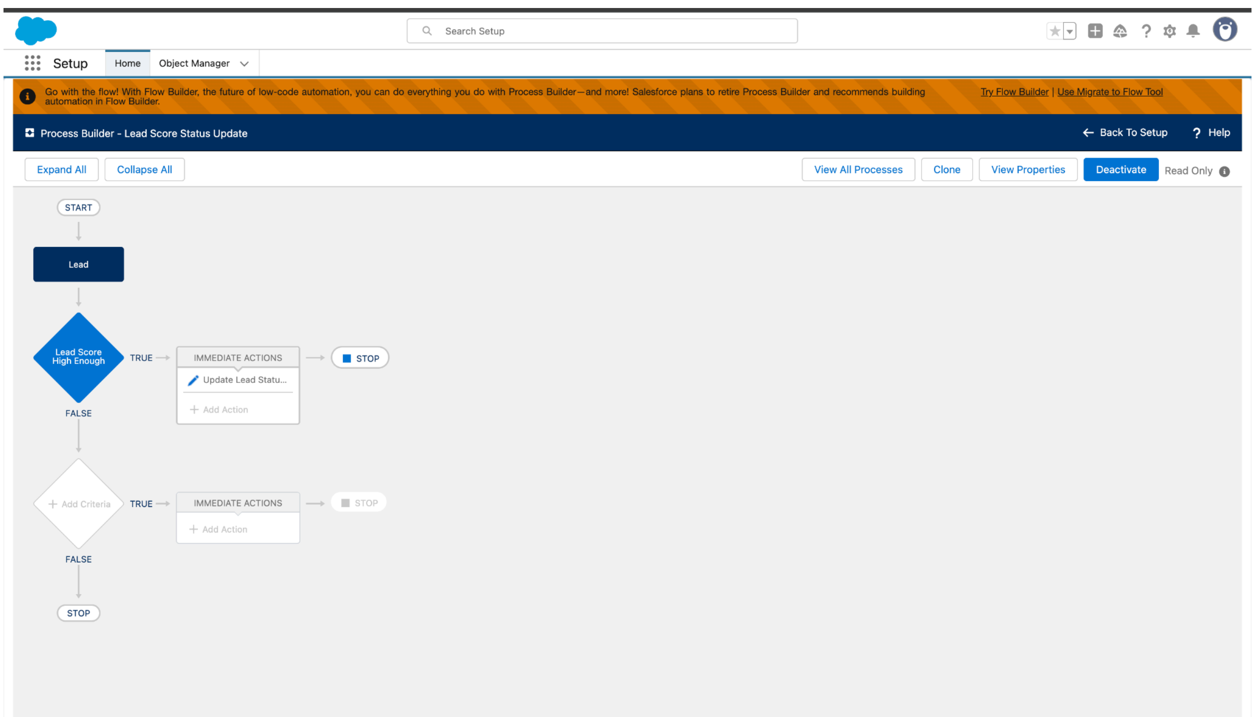
2. Workflow Rules

Use Case:
Workflow Rules were used to automate a key internal sales process. When a sales agent completes a follow-up task on a Lead, a Workflow Rule automatically updates the Lead's status to "Working - Contacted." Additionally, a time-dependent action within a separate rule sends an automated email alert to the assigned sales agent if a follow-up task is marked as overdue, prompting them to take immediate action.



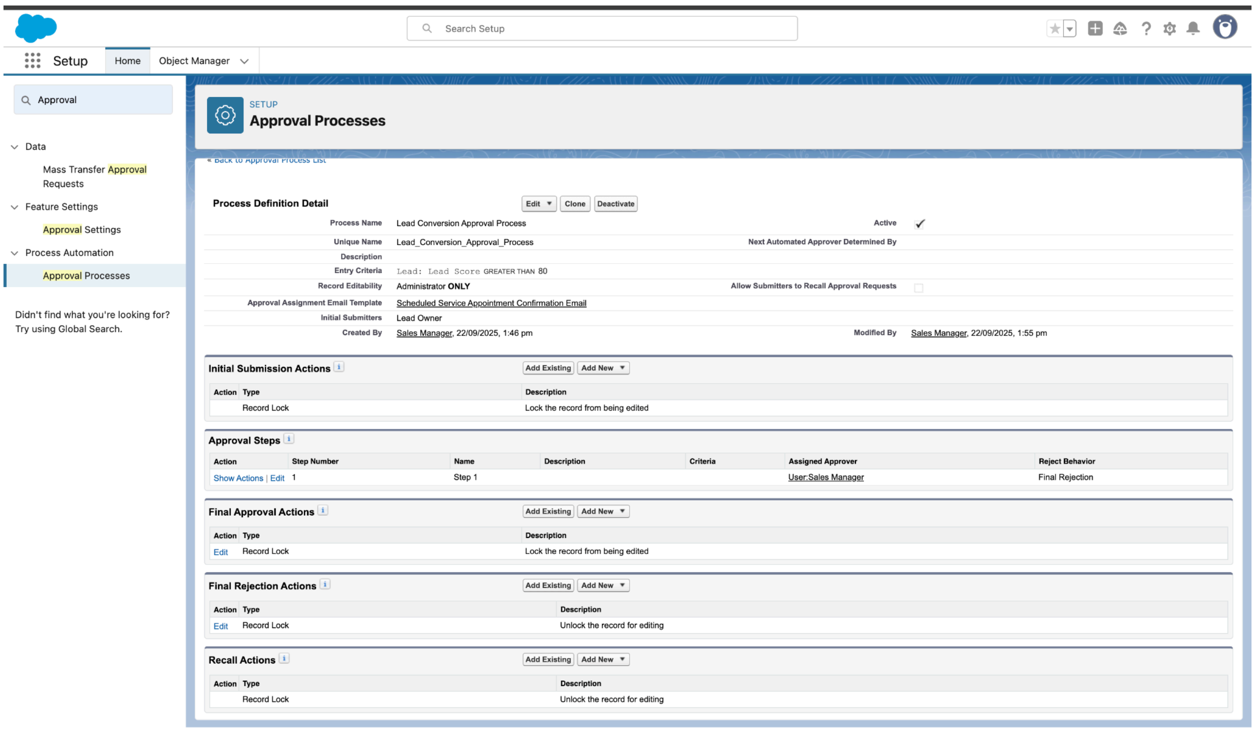
3. Process Builder

Use Case:
Process Builder was leveraged for more complex, multi-step automation. For this project, a process was created that triggers whenever a Lead's status is updated to "Working - Contacted." This single process performs multiple actions: it creates a new follow-up task for the Lead owner and simultaneously updates a custom "Last Contact Date" field on the Lead record. This consolidated automation streamlines the follow-up process and maintains accurate lead history.



4. Approval Process

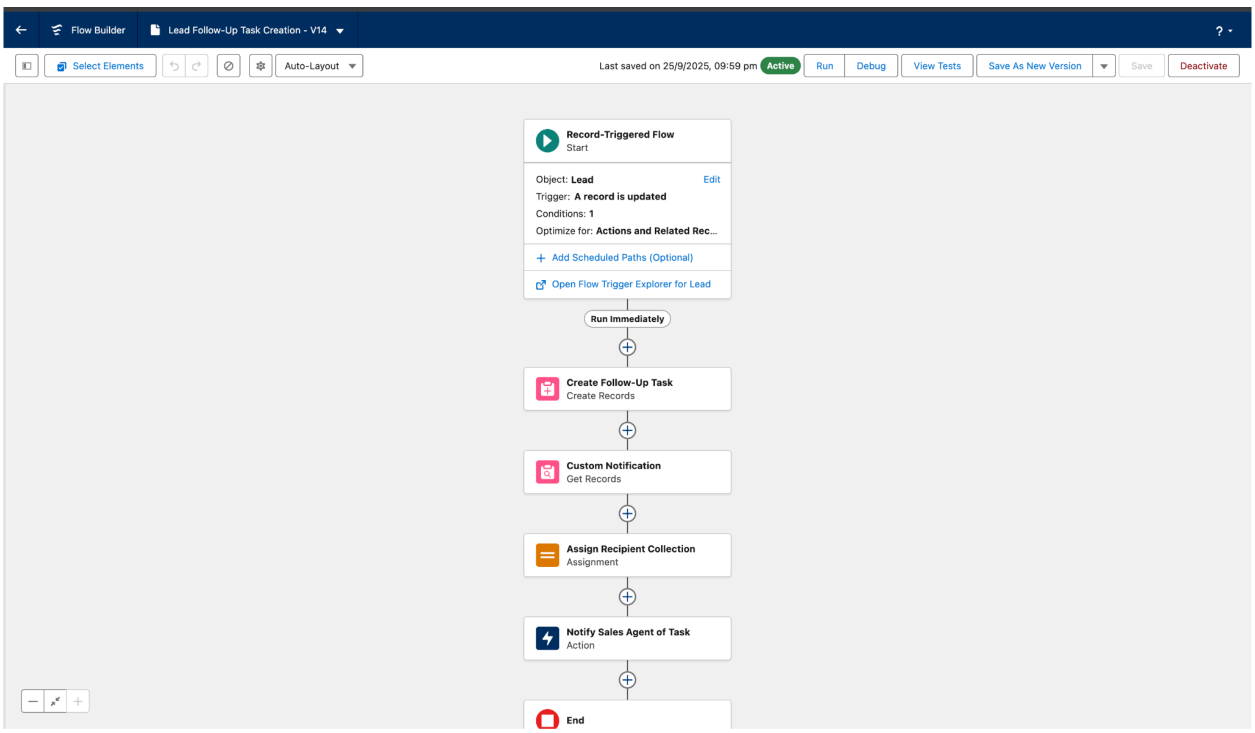
Use Case:
An Approval Process was designed to manage the approval of special discounts and deals for certain Leads. When a sales agent proposes a discount that exceeds a predetermined threshold, the Lead record is submitted for approval. The process automatically routes the request to the sales manager, who can then approve or reject the request. The approval status is tracked on the Lead record, providing a clear audit trail for all deal-related decisions.



5. Flow Builder

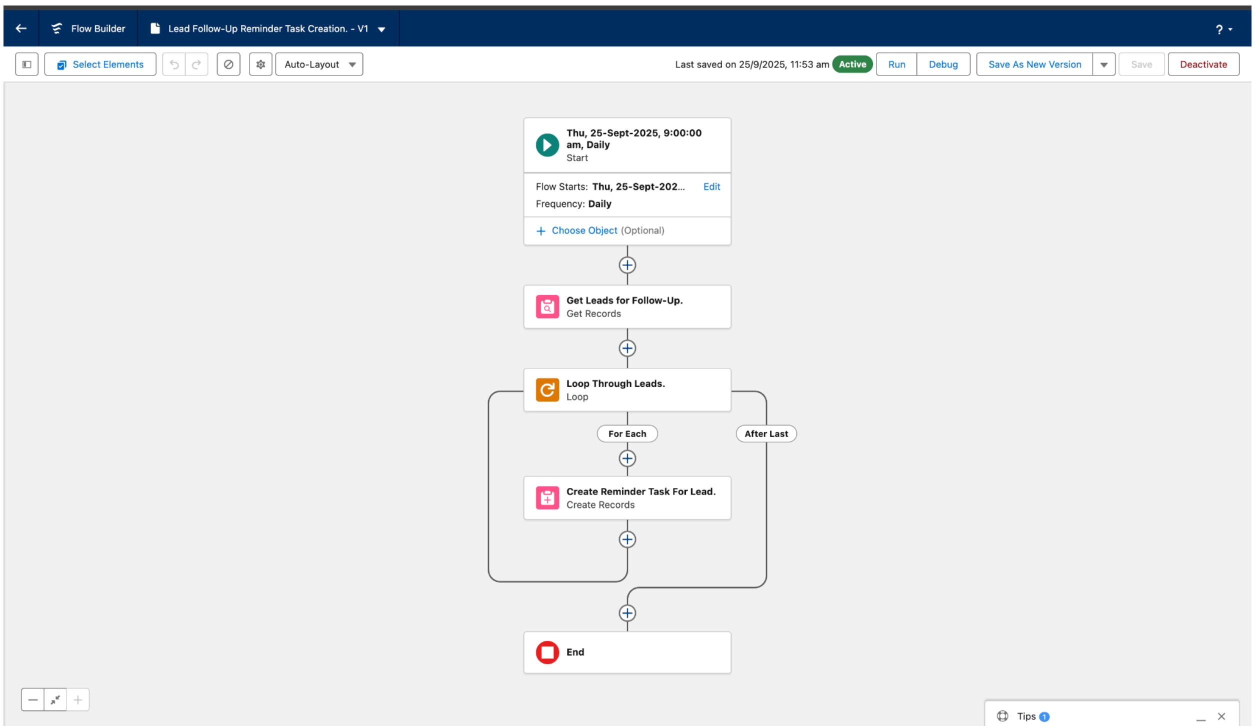
Record-Triggered Flows

Use Case:
A Record-Triggered Flow was used to instantly create a standardized follow-up task whenever a Lead's status is changed to “Working - Contacted.” This flow ensures that a clear next step is always created for the sales agent, reducing manual task creation and improving response time.



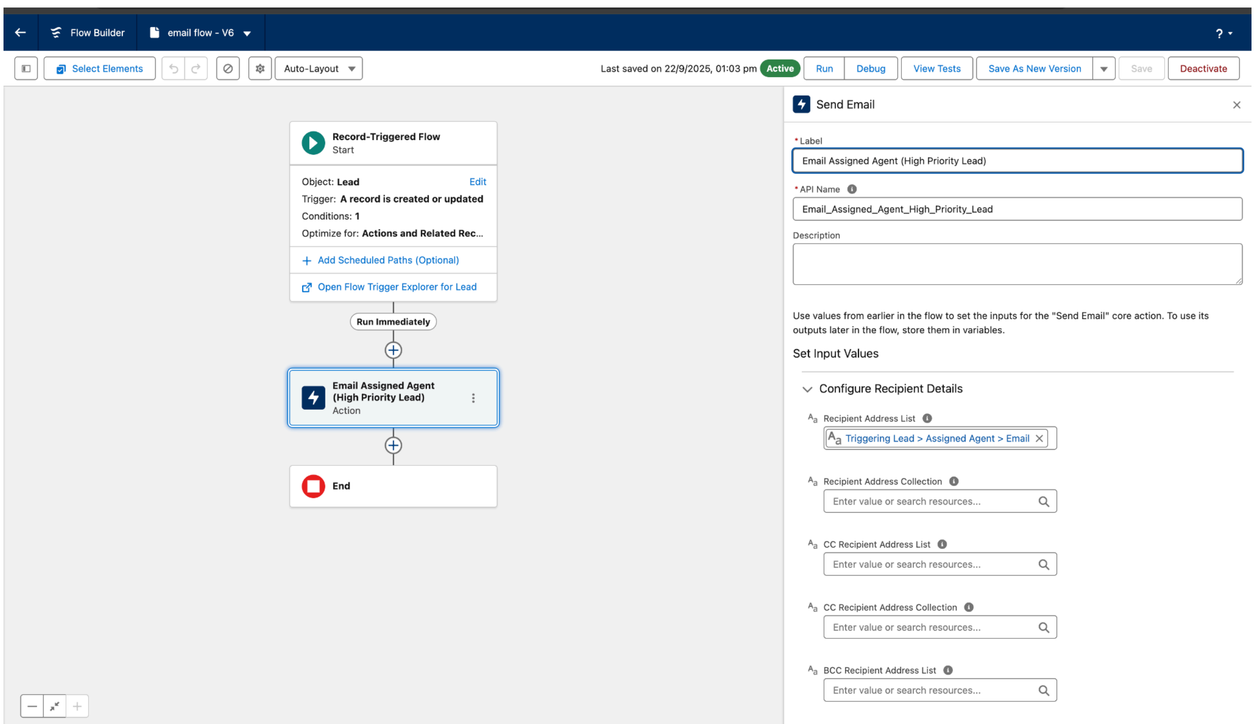
Scheduled Flows

Use Case:
A Scheduled Flow runs daily to perform a batch check on all open tasks. The flow identifies tasks that are overdue by more than 24 hours and automatically updates their priority to "High," creates a new reminder task, and sends an internal notification to the task owner.



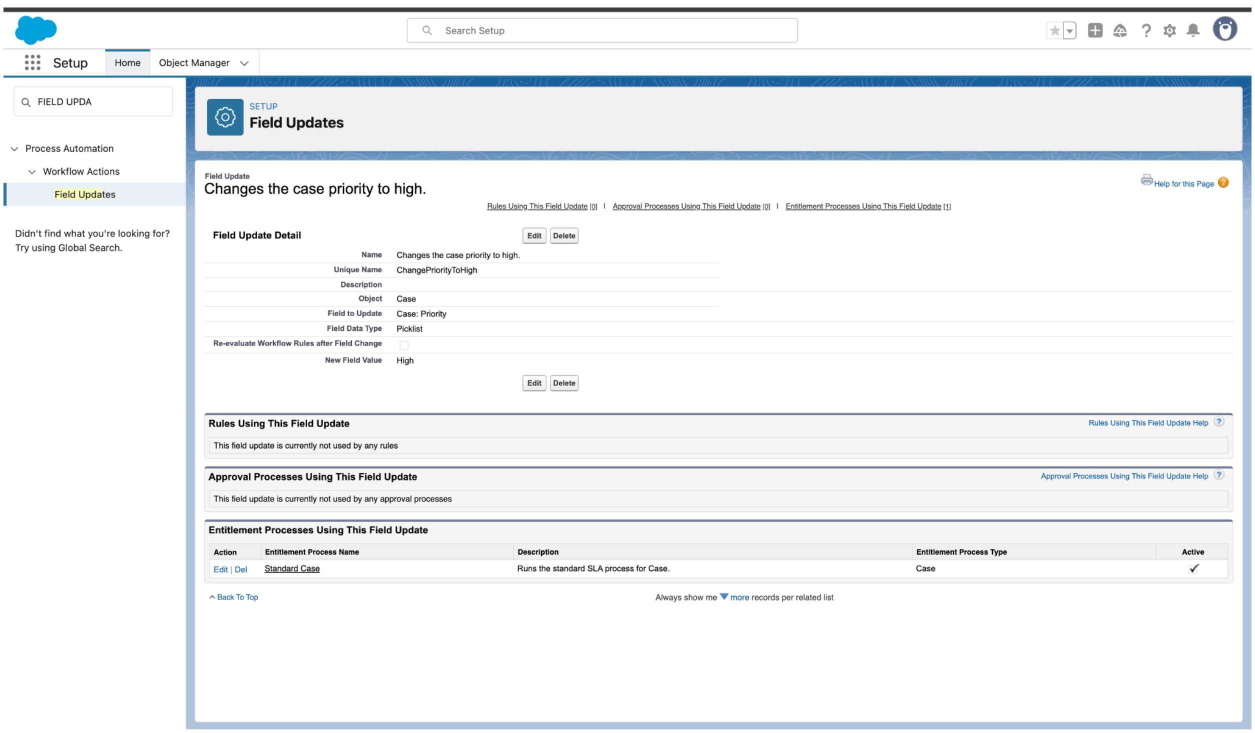
6. Email Alerts

Use Case:
Email Alerts were configured to provide crucial notifications to key stakeholders. An alert is triggered when a new follow-up task is assigned to a sales agent, ensuring they are immediately aware of their new responsibility. Another alert is configured to notify the sales manager when a high-priority Lead has been neglected for too long, as identified by a Scheduled Flow.



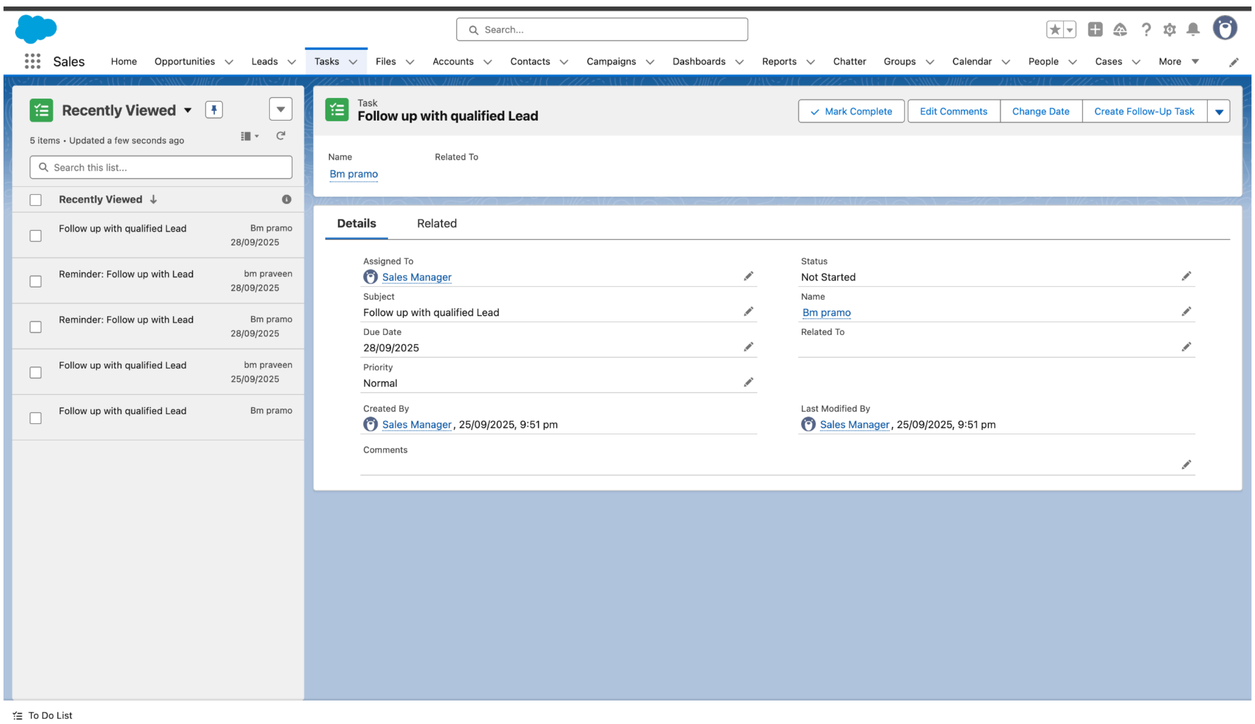
7. Field Updates

Use Case:
Field Updates were used extensively within Workflow Rules and Processes to maintain data consistency. For example, a Field Update action was used to automatically set the "Follow-up Priority" field on a task record to "High" when an overdue condition is met, as part of the scheduled flow logic. This ensures that the most urgent tasks are easily identified.



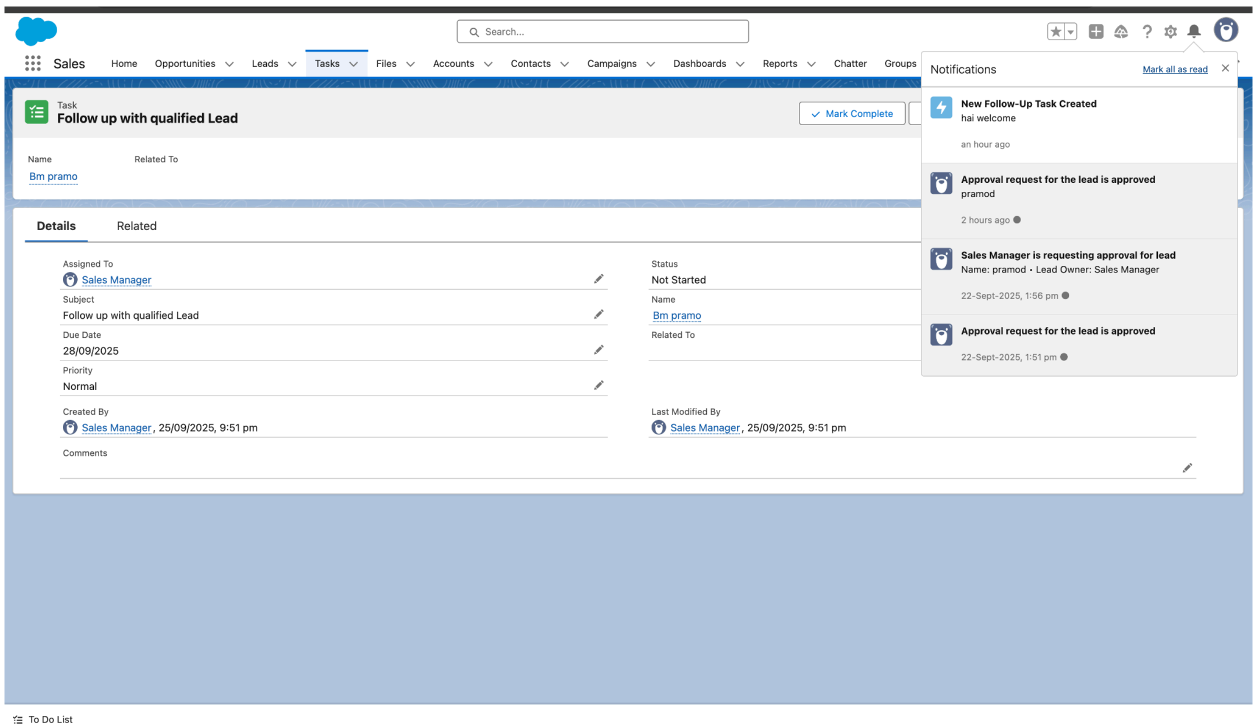
8. Tasks

Use Case:
Tasks serve as the central action items for managing and tracking Lead follow-ups. In this project, tasks are automatically generated by a variety of automation tools, including flows and processes. They provide a standardized way for sales agents to manage their work and for sales managers to monitor progress.



9. Custom Notifications

Use Case:
Custom Notifications were implemented to provide real-time alerts to sales agents. When a new high-priority follow-up task is created, a custom notification appears directly within the Salesforce desktop and mobile apps, ensuring that the sales agent sees the alert immediately, without needing to check their email.



Conclusion

This documentation outlines the core Salesforce configuration and automation implemented in Phase 4 of the project. The strategic use of Validation Rules, Workflow Rules, Process Builder, and advanced Flows has significantly enhanced Lead follow-up efficiency, improved data integrity, and increased sales agent engagement.