

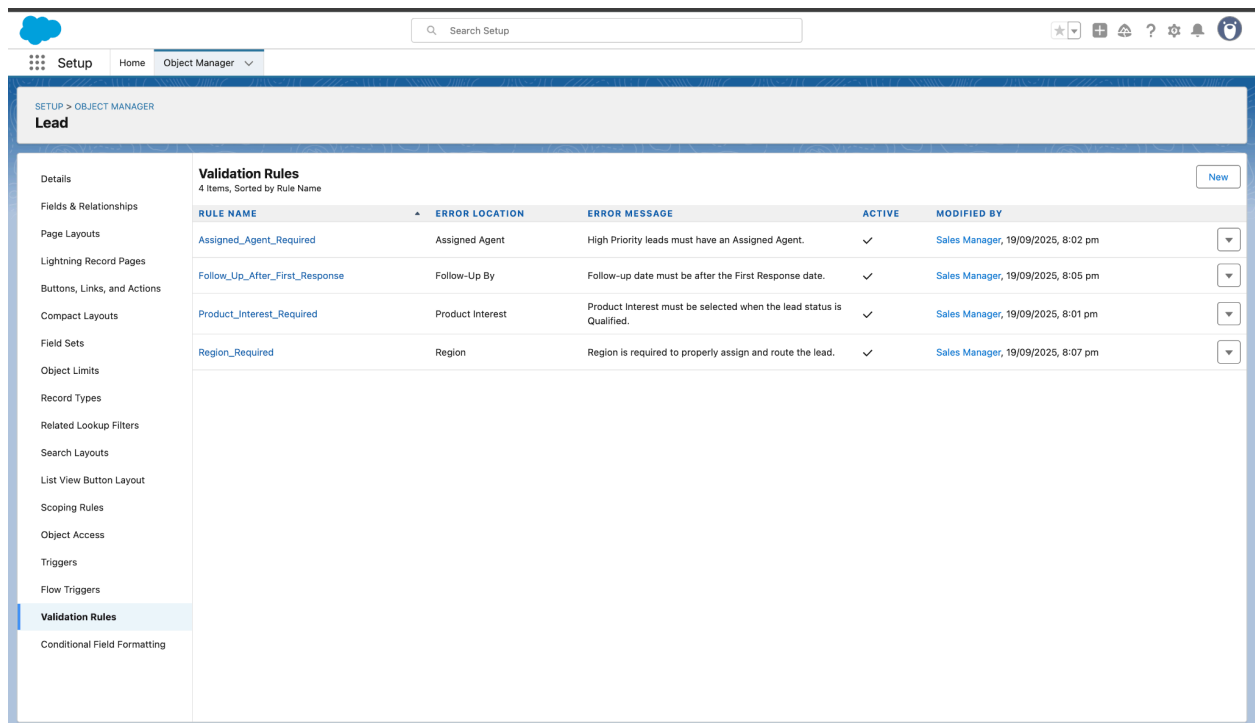
Phase 4 Report

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.



The screenshot displays the Salesforce Setup interface for the Lead object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (highlighted), and Conditional Field Formatting. The main content area is titled 'Validation Rules' and shows a table of 4 items, sorted by Rule Name. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The rules listed are Assigned_Agent_Required, Follow_Up_After_First_Response, Product_Interest_Required, and Region_Required.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Assigned_Agent_Required	Assigned Agent	High Priority leads must have an Assigned Agent.	✓	Sales Manager, 19/09/2025, 8:02 pm
Follow_Up_After_First_Response	Follow-Up By	Follow-up date must be after the First Response date.	✓	Sales Manager, 19/09/2025, 8:05 pm
Product_Interest_Required	Product Interest	Product Interest must be selected when the lead status is Qualified.	✓	Sales Manager, 19/09/2025, 8:01 pm
Region_Required	Region	Region is required to properly assign and route the lead.	✓	Sales Manager, 19/09/2025, 8:07 pm

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.

The screenshot displays the Salesforce Setup interface for Workflow Rules. The left sidebar shows the navigation menu with 'Setup' selected, and 'Workflow Rules' highlighted under 'Process Automation'. The main content area is titled 'Workflow Rules' and shows the details for a specific rule named 'Lead Nurture - High Priority Email'.

Workflow Rule Detail

Field	Value
Rule Name	Lead Nurture - High Priority Email
Active	✓
Object	Lead
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Evaluate the rule when the record is created, and any time it's edited to subsequently meet criteria.
Rule Criteria	Lead: Priority EQUALS High
Created By	Sales Manager, 22/09/2025, 10:15 am
Modified By	Sales Manager, 22/09/2025, 10:20 am

Workflow Actions

Immediate Workflow Actions

Type	Description
Email Alert	Email Assigned Agent (High Priority Lead)

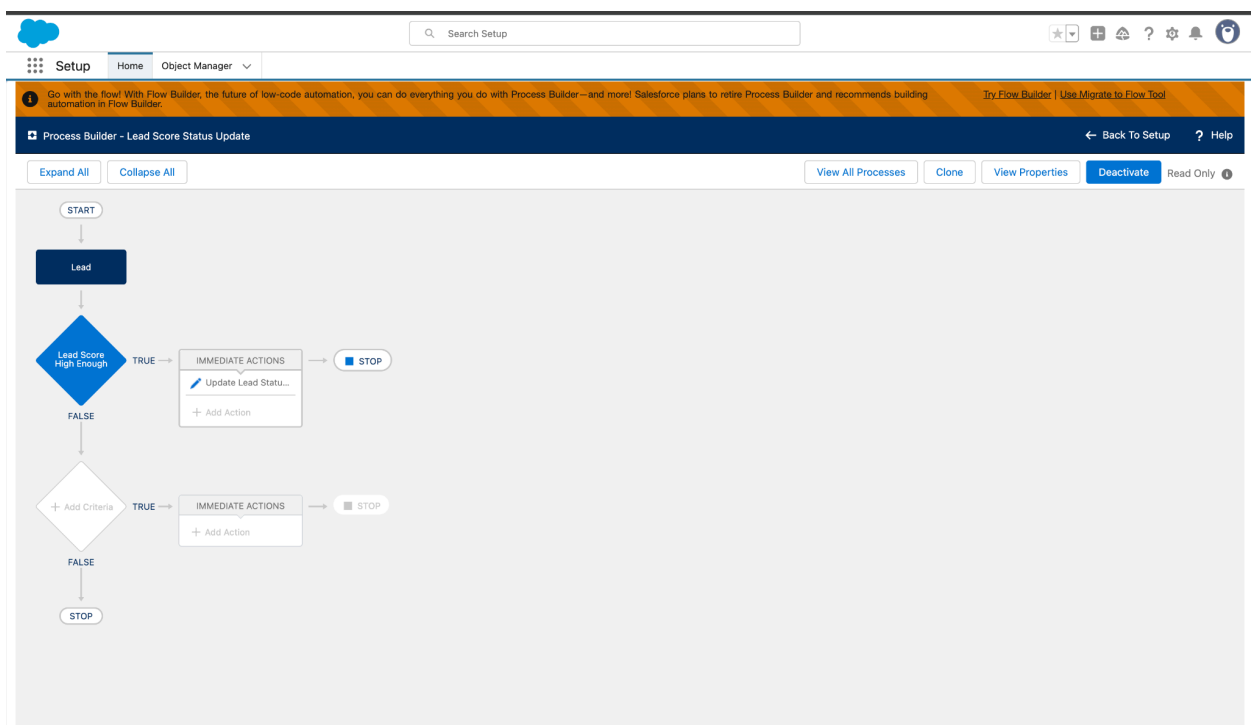
Time-Dependent Workflow Actions [See an example](#)

⚠ You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

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.



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.

Setup | Home | Object Manager ▾

Approval

Data

- Mass Transfer Approval Requests
- Feature Settings
- Approval Settings
- Process Automation
- Approval Processes**

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SETUP

Approval Processes

[← BACK TO APPROVAL PROCESS LIST](#)

Process Definition Detail

Edit ▾ Clone Deactivate

Process Name	Lead Conversion Approval Process	Active	✓
Unique Name	Lead_Conversion_Approval_Process	Next Automated Approver Determined By	
Description			
Entry Criteria	Lead: Lead Score GREATER THAN 80		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Scheduled Service Appointment Confirmation Email		
Initial Submitters	Lead Owner		
Created By	Sales Manager: 22/09/2025, 1:46 pm	Modified By	Sales Manager: 22/09/2025, 1:55 pm

Initial Submission Actions ¹

Add Existing Add New ▾

Action Type	Description
Record Lock	Lock the record from being edited

Approval Steps ¹

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User:Sales Manager	Final Rejection

Final Approval Actions ¹

Add Existing Add New ▾

Action Type	Description
Edit Record Lock	Lock the record from being edited

Final Rejection Actions ¹

Add Existing Add New ▾

Action Type	Description
Edit Record Lock	Unlock the record for editing

Recall Actions ¹

Add Existing Add New ▾

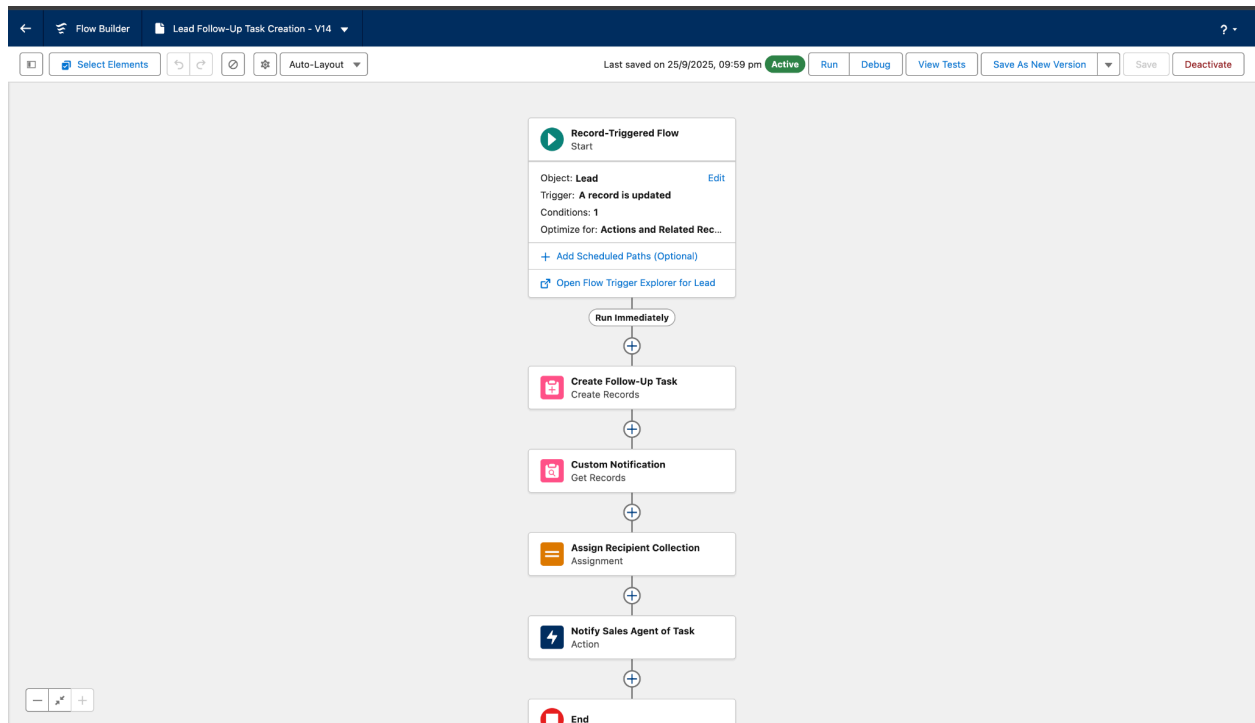
Action Type	Description
Record Lock	Unlock the record for editing

5. Flow Builder

Record-Triggered Flows

Use Case:

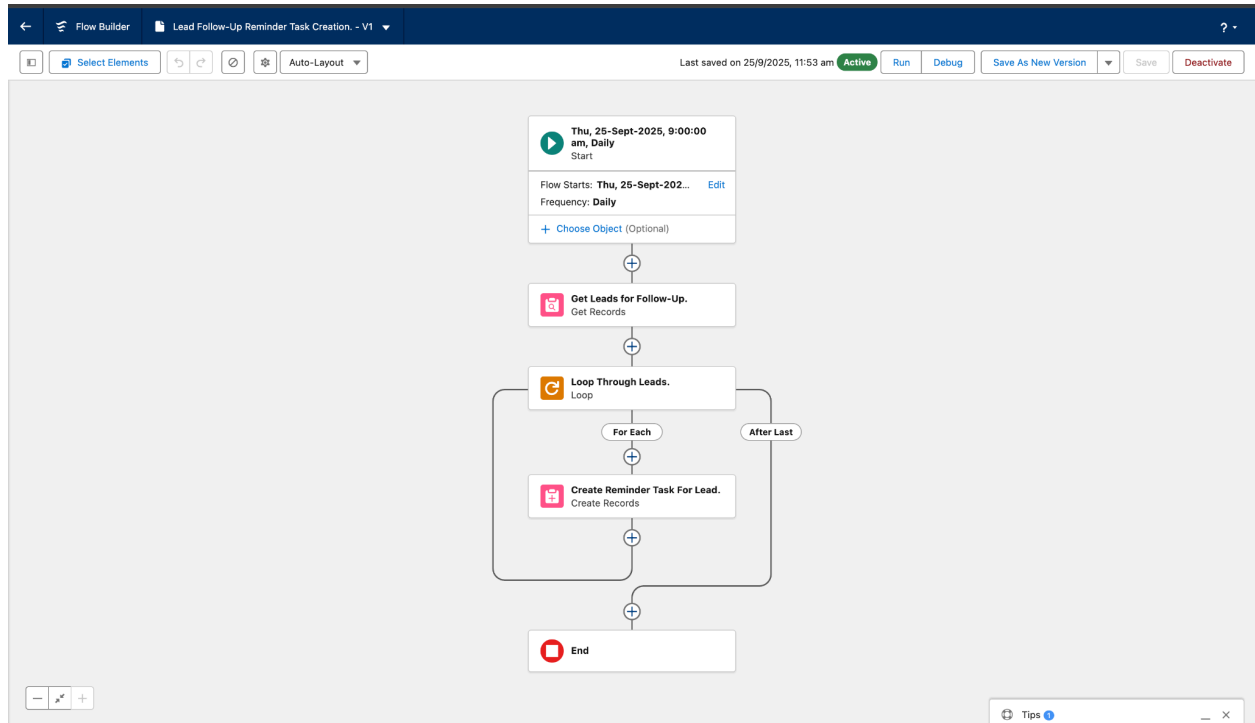
A Record-Triggered Flow was used to instantly create a standardized follow-up task whenever a Lead's status is changed to "Working - Contacted." This flow ensures that a clear next step is always created for the sales agent, reducing manual task creation and improving response time.



Scheduled Flows

Use Case:

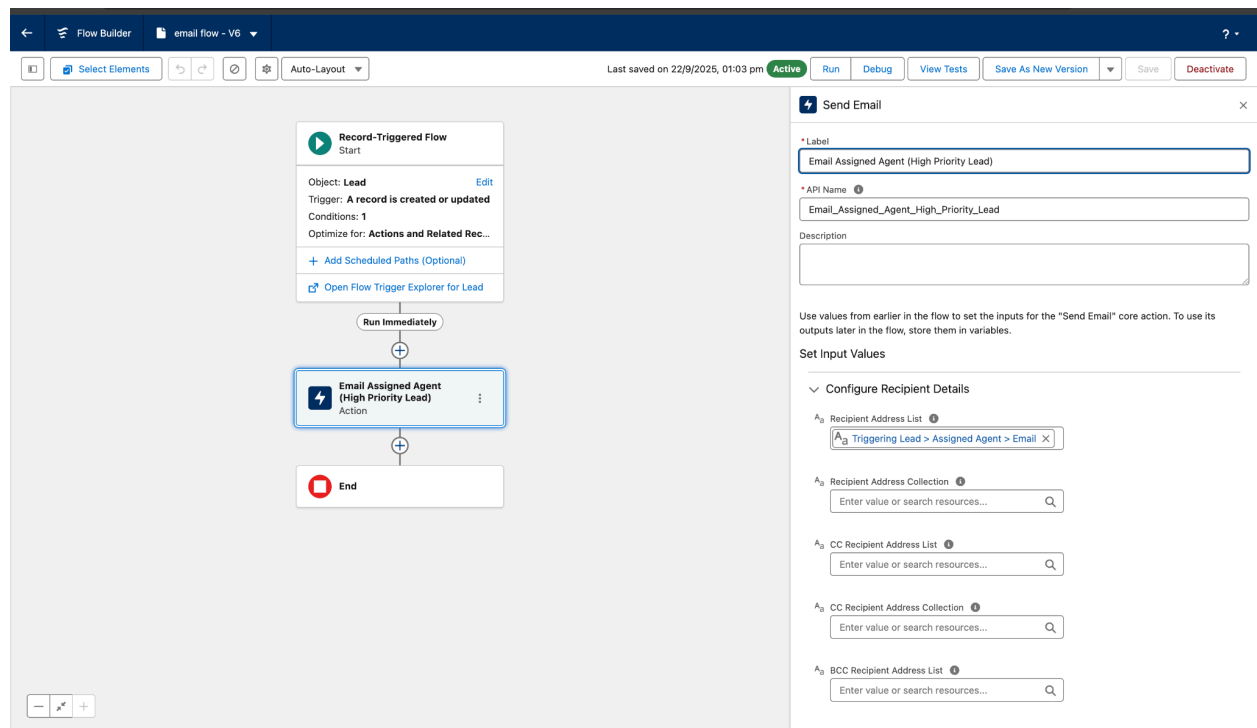
A Scheduled Flow runs daily to perform a batch check on all open tasks. The flow identifies tasks that are overdue by more than 24 hours and automatically updates their priority to "High," creates a new reminder task, and sends an internal notification to the task owner.



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.

The screenshot shows the Salesforce Setup interface for Field Updates. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Field Updates" and displays details for a specific field update named "Changes the case priority to high." The details include the Name, Unique Name, Description, Object, Field to Update, Field Data Type, and Re-evaluate Workflow Rules after Field Change. Below the details are sections for Rules Using This Field Update, Approval Processes Using This Field Update, and Entitlement Processes Using This Field Update. The Entitlement Processes section shows a table with one process named "Standard Case" that is active.

Field Update Detail

Name	Changes the case priority to high.
Unique Name	ChangePriorityToHigh
Description	
Object	Case
Field to Update	Case: Priority
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	
New Field Value	High

Rules Using This Field Update

This field update is currently not used by any rules

Approval Processes Using This Field Update

This field update is currently not used by any approval processes

Entitlement Processes Using This Field Update

Action	Entitlement Process Name	Description	Entitlement Process Type	Active
Edit Del	Standard Case	Runs the standard SLA process for Case.	Case	✓

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.

The screenshot displays the Salesforce 'Tasks' page. The top navigation bar includes a search bar and various utility icons. The left sidebar shows the 'Recently Viewed' list with 5 items, updated a few seconds ago. The main content area is divided into two sections: a task list on the left and a detailed view of a selected task on the right.

Task List (Recently Viewed):

Task	Assigned To	Due Date
Follow up with qualified Lead	Bm pramo	28/09/2025
Reminder: Follow up with Lead	bm praveen	28/09/2025
Reminder: Follow up with Lead	Bm pramo	28/09/2025
Follow up with qualified Lead	bm praveen	25/09/2025
Follow up with qualified Lead	Bm pramo	

Task Details View:

Task: Follow up with qualified Lead

Buttons: Mark Complete, Edit Comments, Change Date, Create Follow-Up Task

Name: Bm pramo

Related To:

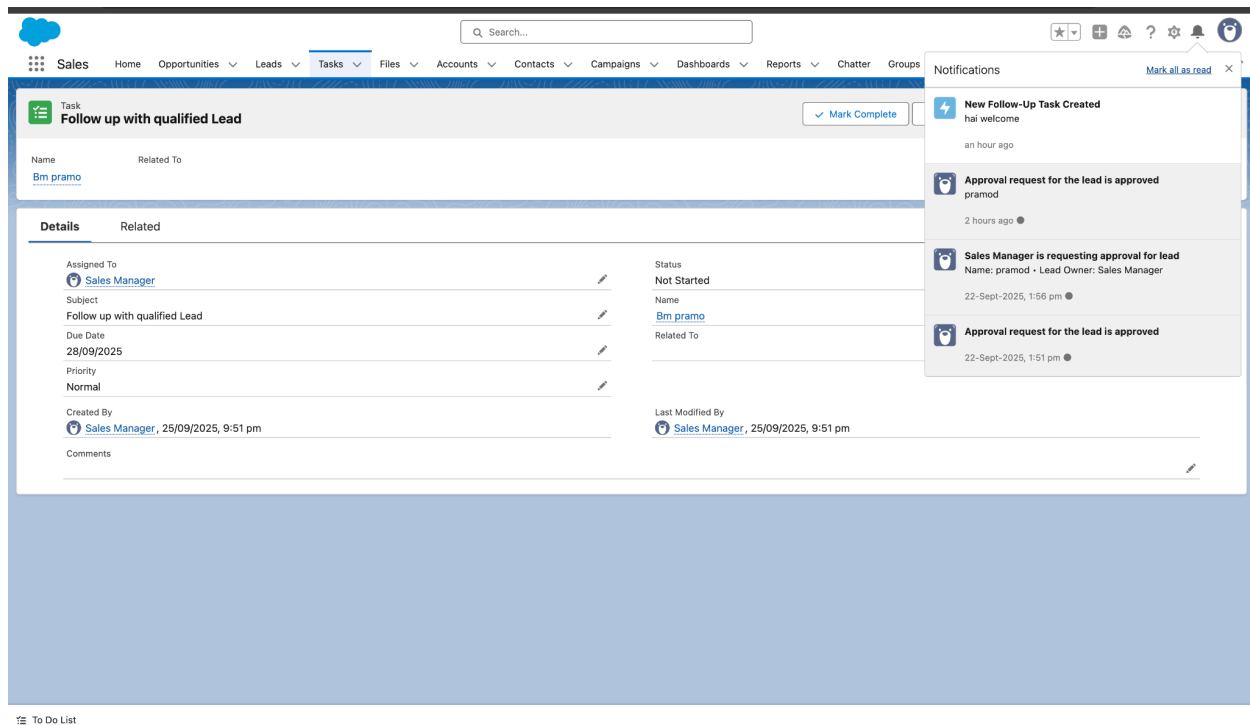
Details:

Field	Value
Assigned To	Sales Manager
Status	Not Started
Subject	Follow up with qualified Lead
Name	Bm pramo
Due Date	28/09/2025
Related To	
Priority	Normal
Created By	Sales Manager, 25/09/2025, 9:51 pm
Last Modified By	Sales Manager, 25/09/2025, 9:51 pm
Comments	

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.



The screenshot displays the Salesforce user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a main navigation menu with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and Groups. The 'Tasks' tab is currently selected.

The main content area shows a task titled 'Follow up with qualified Lead'. The task details include:

- Name: Bm pramo
- Related To: (link to related record)
- Assigned To: Sales Manager
- Subject: Follow up with qualified Lead
- Due Date: 28/09/2025
- Priority: Normal
- Created By: Sales Manager, 25/09/2025, 9:51 pm
- Status: Not Started
- Name: Bm pramo
- Related To: (link to related record)
- Last Modified By: Sales Manager, 25/09/2025, 9:51 pm

On the right side, there is a 'Notifications' panel. It contains several notification items:

- New Follow-Up Task Created**: hai welcome, an hour ago.
- Approval request for the lead is approved**: pramod, 2 hours ago.
- Sales Manager is requesting approval for lead**: Name: pramod • Lead Owner: Sales Manager, 22-Sept-2025, 1:56 pm.
- Approval request for the lead is approved**: 22-Sept-2025, 1:51 pm.

At the bottom left, there is a 'To Do List' icon.

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.