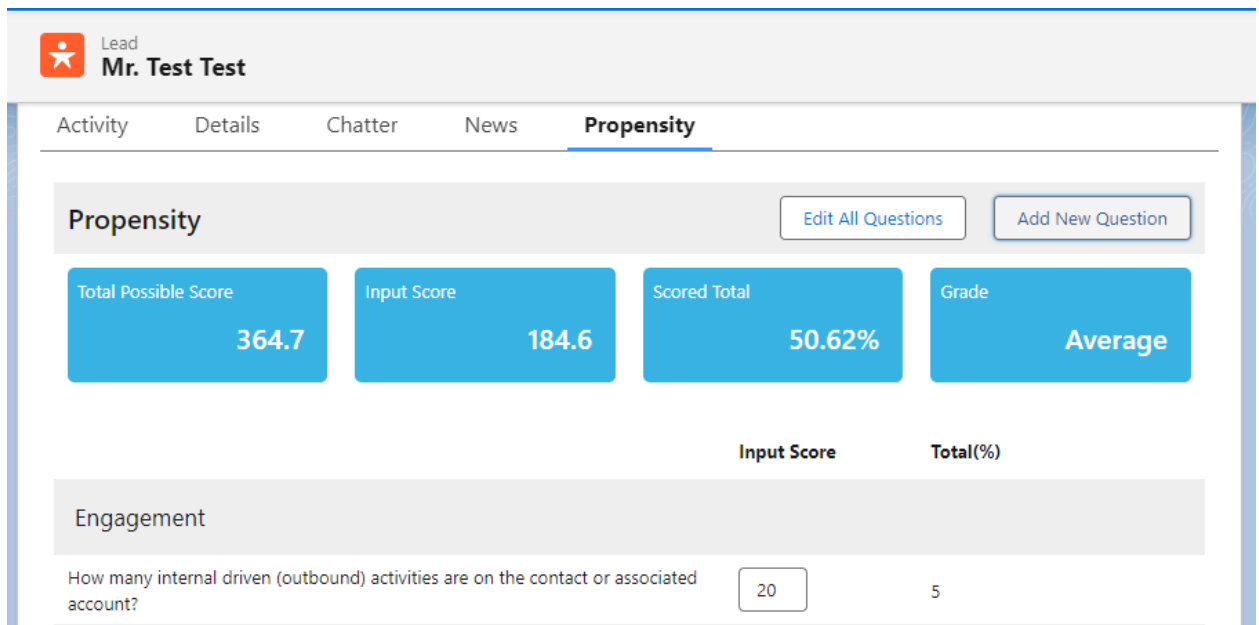


Brief description of the Propensity Model:

The go-to tool for identifying the most promising leads, accounts, and opportunities. This app uses intelligent scoring models to help you make data-driven decisions and maximise your sales potential.



The screenshot shows the 'Propensity' tab for a lead named 'Mr. Test Test'. The interface includes a header with navigation tabs (Activity, Details, Chatter, News, Propensity) and buttons for 'Edit All Questions' and 'Add New Question'. Below the header, there are four blue boxes displaying key metrics: Total Possible Score (364.7), Input Score (184.6), Scored Total (50.62%), and Grade (Average). At the bottom, there is an 'Engagement' section with a question: 'How many internal driven (outbound) activities are on the contact or associated account?'. The input field shows '20' and the total percentage is '5'.

Propensity	
Total Possible Score	364.7
Input Score	184.6
Scored Total	50.62%
Grade	Average

Input Score	Total(%)
20	5

The Propensity Model has some Role Based Actions. The Roles are selected based on the standard Salesforce Roles.

The Salesforce Admin: When a user is a Salesforce Admin with the property PermissionsModifyAllData as checked, then only the user is able to edit, add or delete any question along with the editing of Input Score.



In the Edit All Questions

Templates				
▼	Weightage	▼	Category	▼
How many internal driven (outbound) activities ar...	25		Engagement	Edit Delete
Industry	20		Fit into our Ideal Customer	Edit Delete
Revenue	40		Fit into our Ideal Customer	Edit Delete
Number of employees	60		Fit into our Ideal Customer	Edit Delete
Region	25		Fit into our Ideal Customer	Edit Delete
Locations	30		Fit into our Ideal Customer	Edit Delete
Title	20		Fit into our Ideal Primary Decision Maker	Edit Delete
Length at company	25		Fit into our Ideal Primary Decision Maker	Edit Delete
Status	30		Fit into our Ideal Primary Decision Maker	Edit Delete

This pop up emerges. The admin can delete any question from here or click on the Edit button then

Edit Templates	
Question	How many internal driven (outbound) activities are on the contact or associated account?
Weightage	25
*Total Possible Score	50
Category	Engagement
Lead Field	--None--
Cancel Save	

Here the admin can edit the question, weightage, total possible score, category and the Lead Field.

In Add New Question the admin is able to add a new question along with the weightage, total possible score, category and the Lead Field.

Add New Template

Question

Weightage

* Total Possible Score

0

Category

--None--

Lead Field

--None--

Cancel

Save

For inserting a new Question in the Propensity Model:

The Question Template needs to be created next and the Lead Field (from which it should take value) is a must to populate.

Next, the admin needs to add that condition (for the newly created field) in both the Scheduler and as well as the Record Triggered Flow and also create a sub-flow for that newly created custom field of the Lead.

The subflow needs to be called from both the Scheduler and Record Triggered Flows.

Then finally the Record Triggered Flow needs to be stopped and the Scheduler flow should be activated.

After the successful run of the Scheduler flow the flow needs to be deactivated and the Record Triggered flow needs to be activated.