

## Phase 4: Business Process Automation

In this phase, we automate customer support processes to ensure faster resolution, SLA tracking, and consistent customer experience across all channels.

### 1. Case Assignment Automation

- **Assignment Rules:**
  - Automatically assign cases to the correct **queue or agent** based on channel or case priority.
  - Example: WhatsApp cases → WhatsApp Support Queue, High Priority Email cases → Senior Support Queue.
- **Queues Setup:**
  - WhatsApp Queue, Email Queue, Chat Queue, Social Queue.

The screenshot shows the Salesforce Queue setup page. The left sidebar has a search bar and navigation links for Users (Queues selected), Environments, and Jobs. The main area has a header 'Queues' with a sub-header 'Queues'. It includes a help link 'Help for this Page' and a view selector 'View: All'. A table lists the five queues:

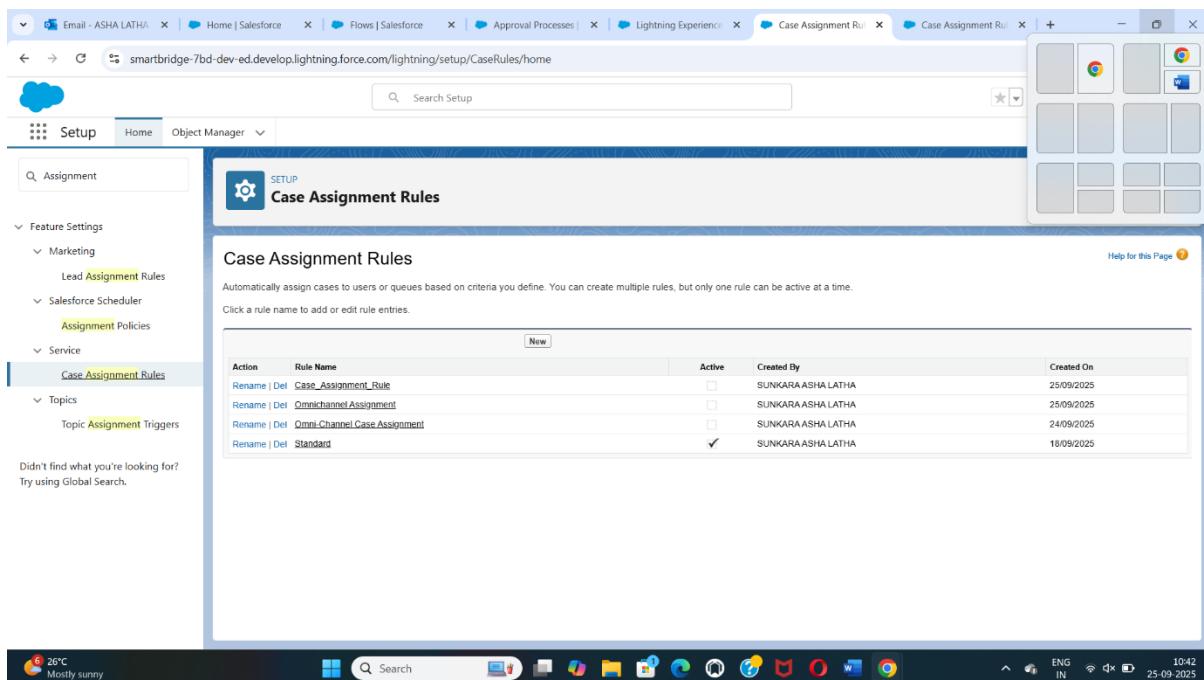
Action	Label	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit   Del	Chat Queue	Chat_Queue		Case	ASHALATHA_SUNKARA	24/09/2025, 10:58 pm
Edit   Del	Email Queue	Email_Queue		Case	ASHALATHA_SUNKARA	24/09/2025, 10:59 pm
Edit   Del	Social Queue	Social_Queue		Case	ASHALATHA_SUNKARA	24/09/2025, 10:59 pm
Edit   Del	WhatsApp Queue	WhatsApp_Queue		Case	ASHALATHA_SUNKARA	25/09/2025, 10:08 am
Edit   Del	WhatsApp Support Queue	WhatsApp_Support_Queue		Case	ASHALATHA_SUNKARA	24/09/2025, 10:57 pm

The bottom status bar shows the date and time as 25-09-2025, 10:42.

## 2. Case Escalation Rules

- **Escalation Policies:**

- If a case is not resolved within **SLA Due Date**, automatically escalate.
  - Example:
    - Level 1: If SLA breach in 4 hrs → Escalate to Supervisor.
    - Level 2: If still unresolved in 8 hrs → Escalate to Support Manager.



### 3. Workflow Rules & Process Builder

- Automations to update fields, send alerts, or create tasks.
  - Examples:
    - If **Sentiment = Negative**, send email alert to supervisor.
    - Auto-update case **Status = In Progress** when assigned to an agent.

## 4. Email Alerts & Notifications

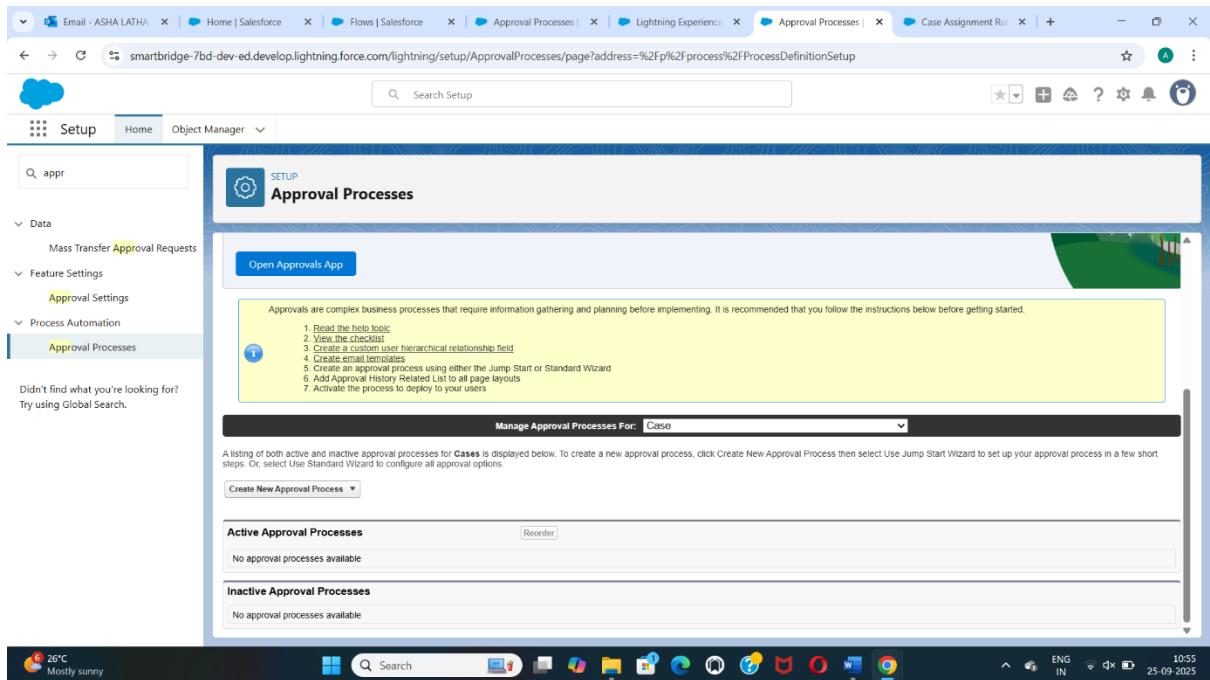
- Send auto-replies to customers when cases are created (per channel).
- Notify agents on assignment or escalation.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Email - ASHA LATHA, Home | Salesforce, Flows | Salesforce, Approval Processes, Lightning Experience, Email Alerts | Salesforce, Case Assignment Rules.
- Search Bar:** Search Setup.
- Left Sidebar:** Workflow Actions (Email Alerts is selected), Field Updates, Outbound Messages, Send Actions, Tasks, Workflow Rules.
- Main Content:**
  - Email Alert Detail:** Unique Name: aa, Description: aa, Sentiment, From Email Address: Current User's email address, Recipients: User: SUNKARAASHALATHA, Additional Emails, Created By: SUNKARAASHA LATHA, 25/09/2025, 10:50 am, Modified By: SUNKARAASHA LATHA, 25/09/2025, 10:50 am.
  - Rules Using This Email Alert:** This alert is currently not used by any rules.
  - Approval Processes Using This Email Alert:** This alert is currently not used by any approval processes.
  - Entitlement Processes Using This Email Alert:** This alert is currently not used by any entitlement processes.
  - Flows Using This Email Alert:** (empty)
- Bottom Bar:** Weather (26°C, Mostly sunny), Search bar, various icons (File, Home, etc.), Date (25-09-2025), Time (10:50), Language (ENG IN).

## 5. Approval Processes

- For cases needing manager intervention (e.g., refund requests).
- Steps:
  - Customer requests refund → Case status changes to “Pending Approval.”
  - Approval routed to Manager → On approval, automation triggers refund workflow.



## 6. Macros (For Agents)

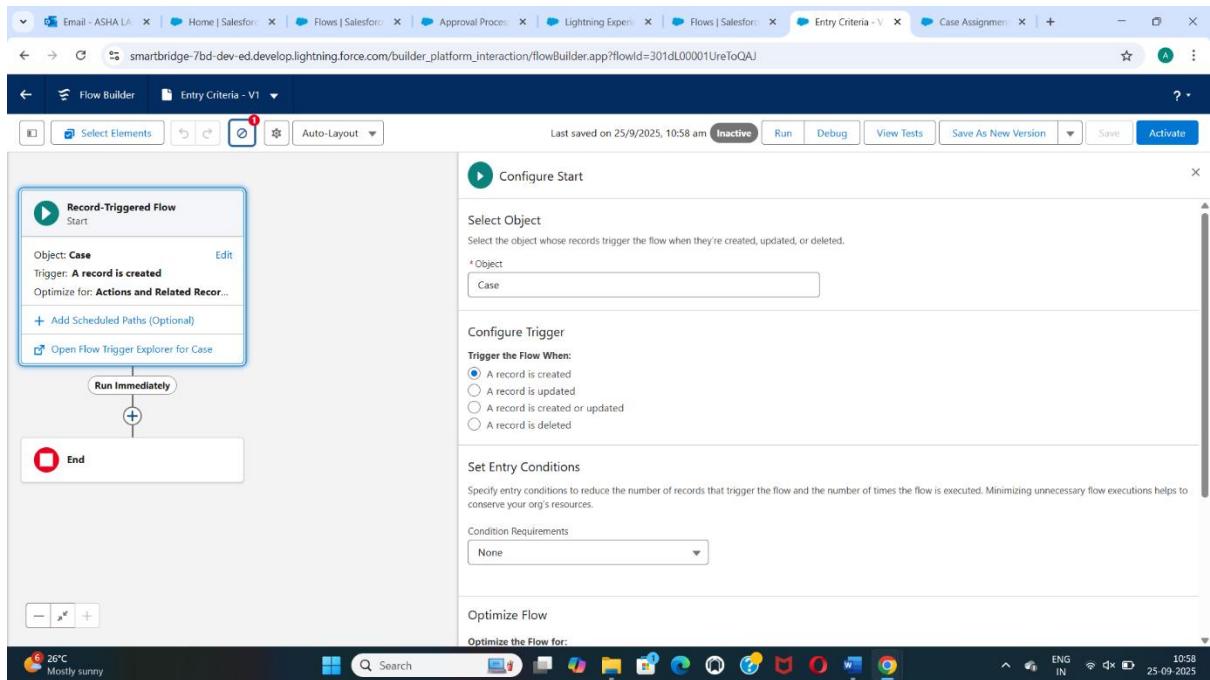
- Define macros for repetitive actions in Service Console.
- Example:
  - “Send Standard WhatsApp Reply” macro.
  - “Close Case with Thank You Message” macro.

## 7. SLA & Milestones (Entitlements)

- Define **entitlement processes** to track SLA timelines.
- Milestones:
  - **First Response within 2 hrs.**
  - **Resolution within 24 hrs.**

## 8. Flow Automations (Lightning Flows)

- **Screen Flows** for agents (to capture additional details while closing a case).
- **Record-Triggered Flows** for automations:
  - Auto-create **Escalation Log record** when SLA is breached.
  - Auto-send **WhatsApp message** using integration.



#### Output of Phase 4:

- Cases auto-routed to correct queues.
- SLA escalations happen automatically.
- Customers get timely notifications.
- Agents save time using macros and flows.