

SafeCity Salesforce Project:

Phase 4: Process Automation

Objective

To automate complaint management in SafeCity using Salesforce, ensuring SLA adherence, timely assignment, escalation, notifications, and data integrity.

1. Flow Builder (Record-Triggered & Scheduled)

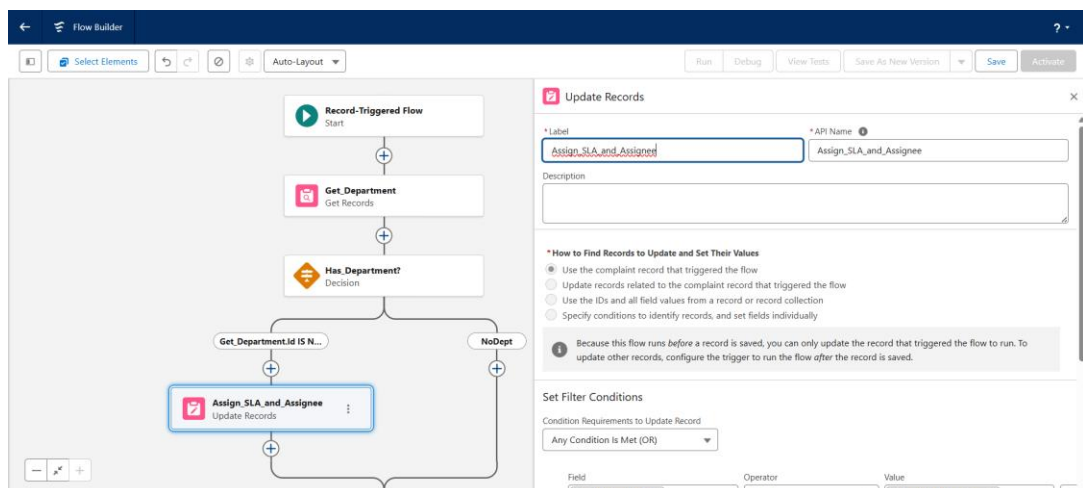
Purpose: Automate SLA calculation, complaint assignment, and escalation.

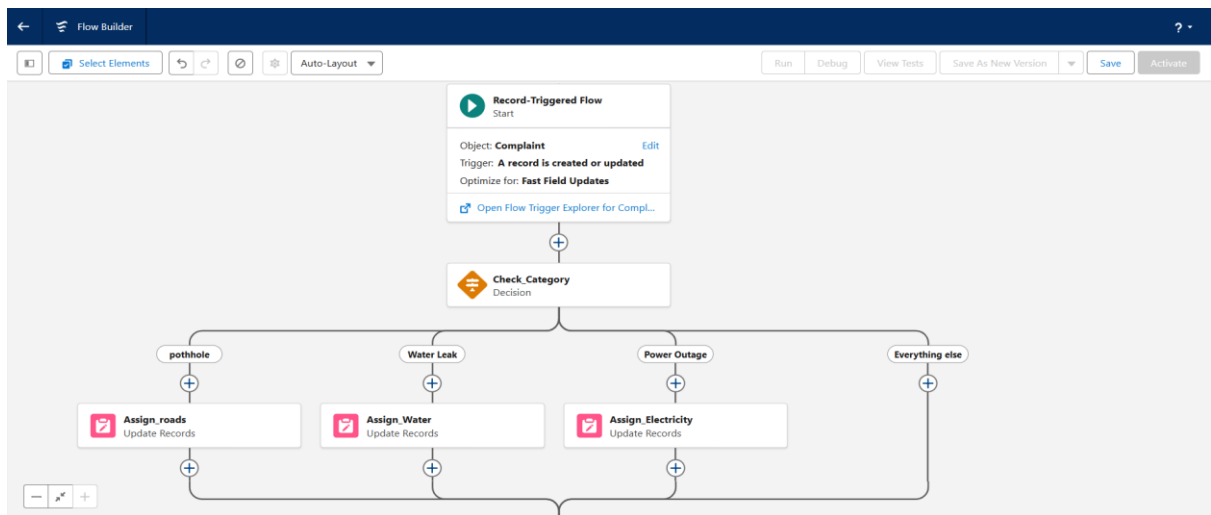
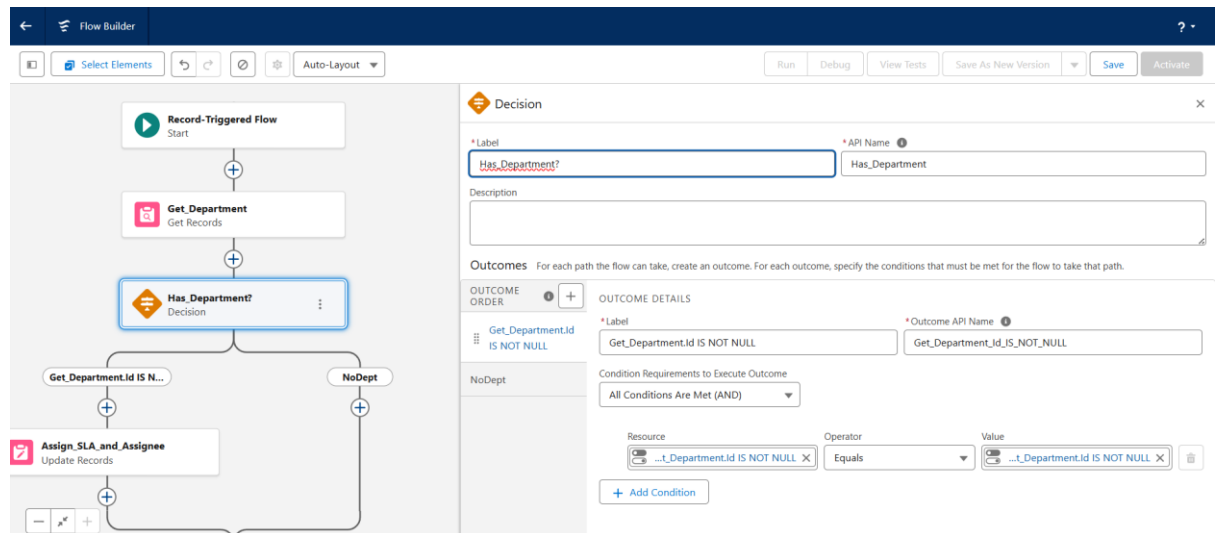
Implementation:

- **Record-Triggered Flow:**
 - Triggered when a complaint is created or updated.
 - Assigns the complaint to the relevant staff based on category.
 - Calculates **SLA Due Date** based on complaint priority.
 - Automatically escalates overdue complaints to supervisors.
- **Scheduled Flow:**
 - Runs daily to check for overdue complaints.
 - Sends notifications for escalated complaints.

Deliverables:

- Screenshot of the Flow canvas
- Test case showing automatic assignment and escalation





2. Email Alerts

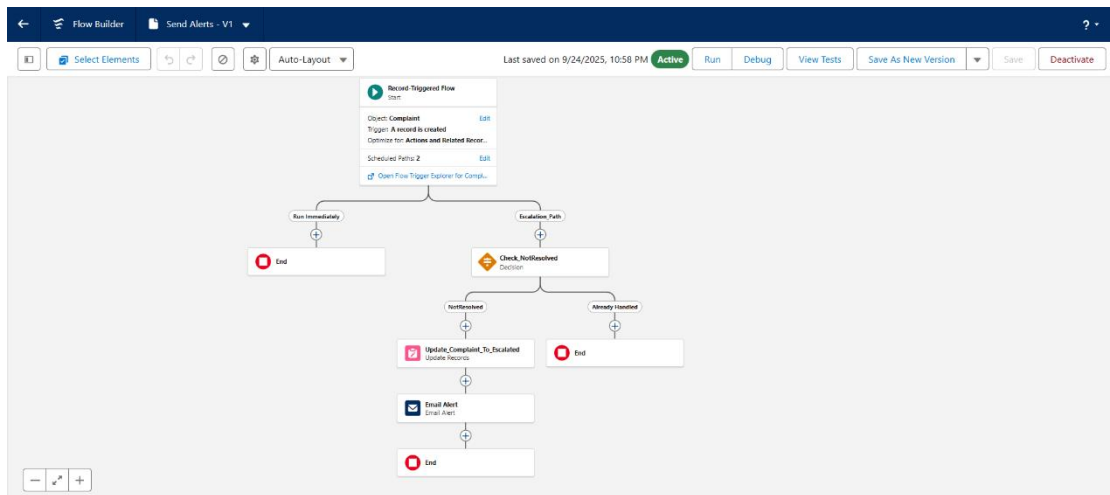
Purpose: Notify staff and supervisors about complaint status and assignments.

Implementation:

- Triggered from Flow or Workflow Rule.
- Recipients: Assigned staff and supervisors.
- Email content includes complaint details and SLA due dates.

Deliverables:

- Example email template screenshot
- Test case showing alert sent on assignment/escalation



Setup | Home | Object Manager

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Setup Home
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Commerce Setup Assistant
Field Service Setup Home (Beta)
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Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere

ADMINISTRATION
> Users
> Data
> Email

PLATFORM TOOLS

SETUP Email Alerts

Object: Complaints

From Email Address: Current User's email address
Recipients: Role: Supervisor
Additional Emails:
Created By: Ahmadi_ 9/24/2025, 10:22 AM
Modified By: Ahmadi_ 9/24/2025, 10:22 AM

Edit Delete Clone

Rules Using This Email Alert [Rules Using This Email Alert Help](#)
This alert is currently not used by any rules

Approval Processes Using This Email Alert [Approval Processes Using This Email Alert Help](#)
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

Flow Name	Version	Description	Object	Active
Send Alerts	1		01gk000002J7pR	✓

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3. Field Updates

Purpose: Automatically update key fields based on automation.

Implementation:

- **SLA Due Date:** Set when complaint is created.
- **Status → Escalated:** Updated automatically when SLA is missed.

Deliverables:

- Screenshot of field update actions in Flow

4. Validation Rules

Purpose: Ensure data quality and prevent incorrect entries.

Examples:

1. **Citizen Email must contain “@”:**
2. `NOT(CONTAINS(Email__c, "@"))`

Error: “Please enter a valid email address.”

3. **Reported Date cannot be in the future:**
4. `Reported_Date__c > TODAY()`

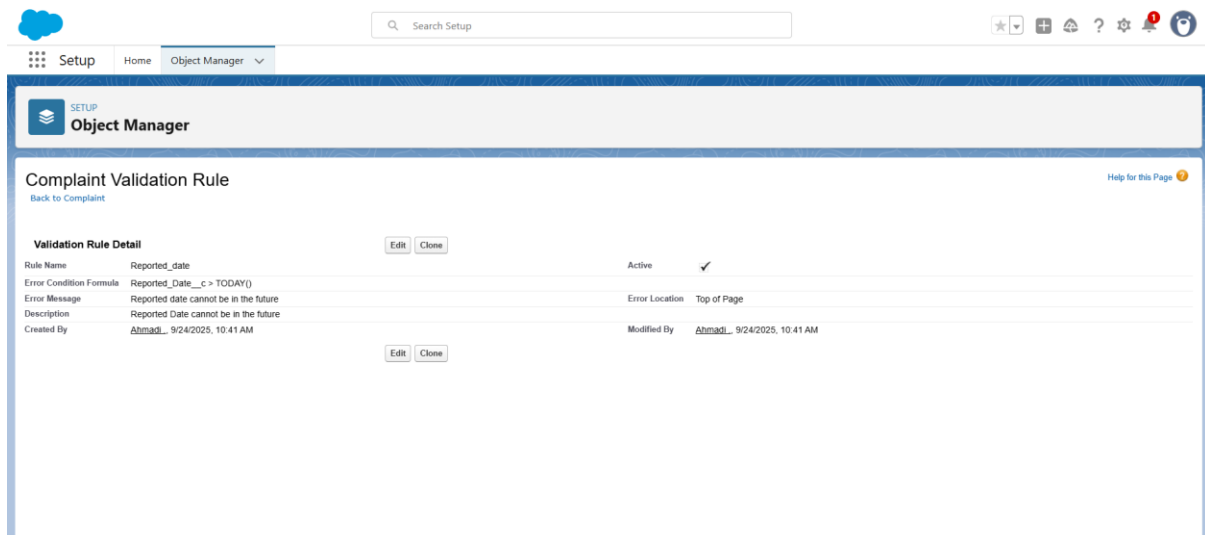
Error: “Reported date cannot be in the future.”

5. **Category is required:**
6. `ISBLANK(Category__c)`

Error: “Please select a complaint category.”

Deliverables:

- List of validation rules with purpose
- Screenshot from Salesforce setup



5. Workflow Rule (Legacy)

Purpose: Automatically set Resolved Date when a complaint is marked as resolved.

- **Object:** Complaint__c
- **Criteria:** Status__c = Resolved
- **Action:** Field Update → Resolved_Date__c = TODAY()

Deliverables:

- Screenshot of Workflow Rule setup
- Explanation of automation

6. Process Builder

Purpose: Automatically create a Task for supervisors on high-priority complaints.

- **Object:** Complaint__c
- **Trigger:** Record created or edited
- **Criteria:** Priority = High AND Status = New
- **Action:** Create Task →
 - Subject: "Supervisor to review high priority complaint"
 - Assigned To: Supervisor
 - Related To: Complaint record
 - Due Date: Today + 1 day

Deliverables:

- Screenshot of Process Builder

