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.
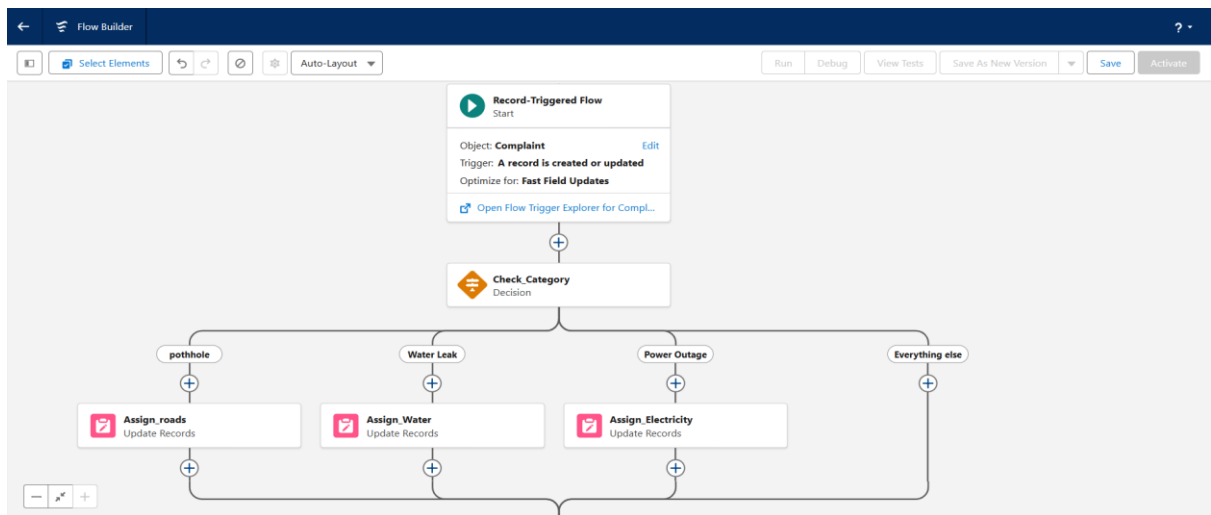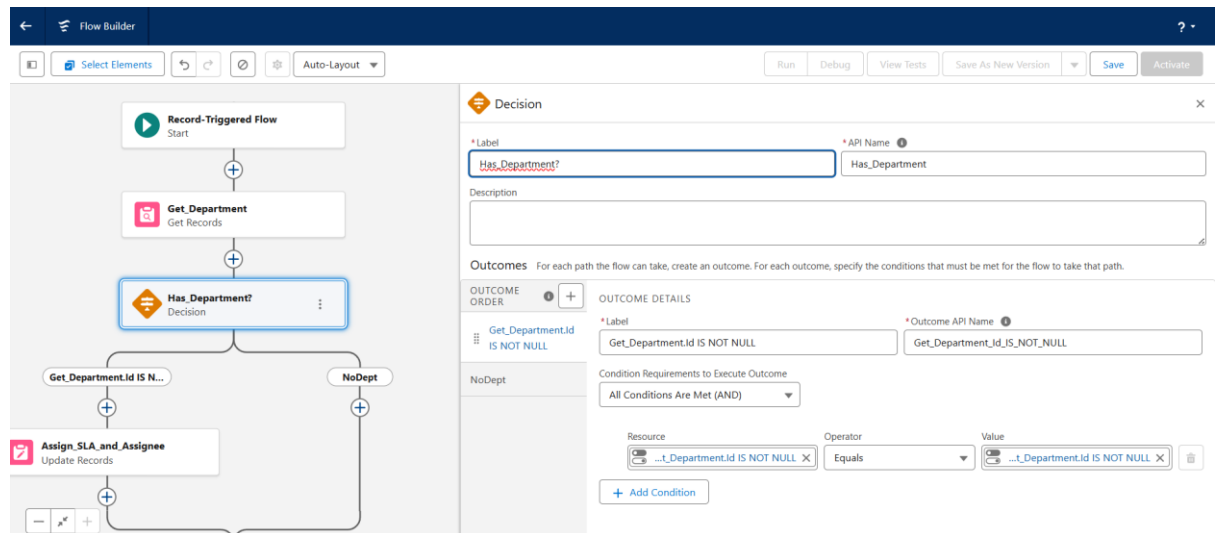
Implementation:

- **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
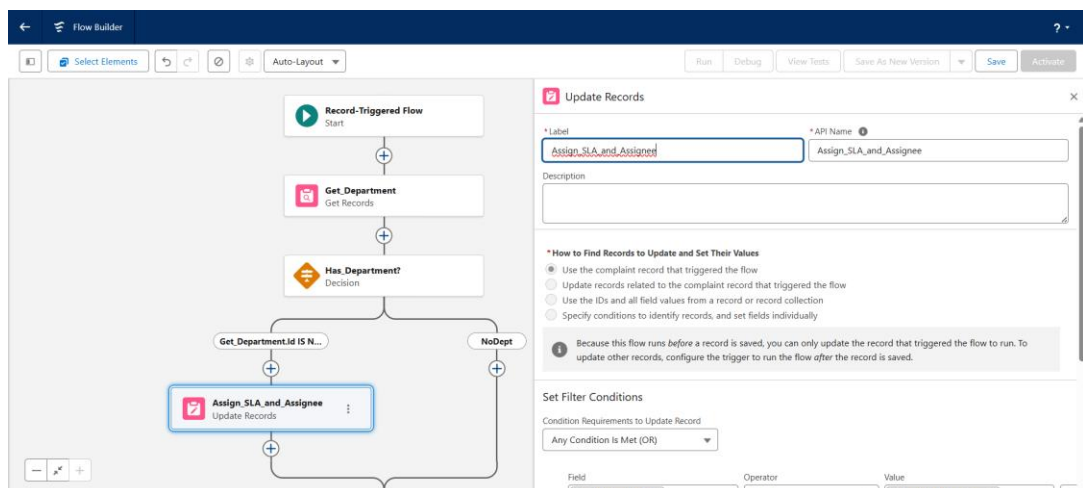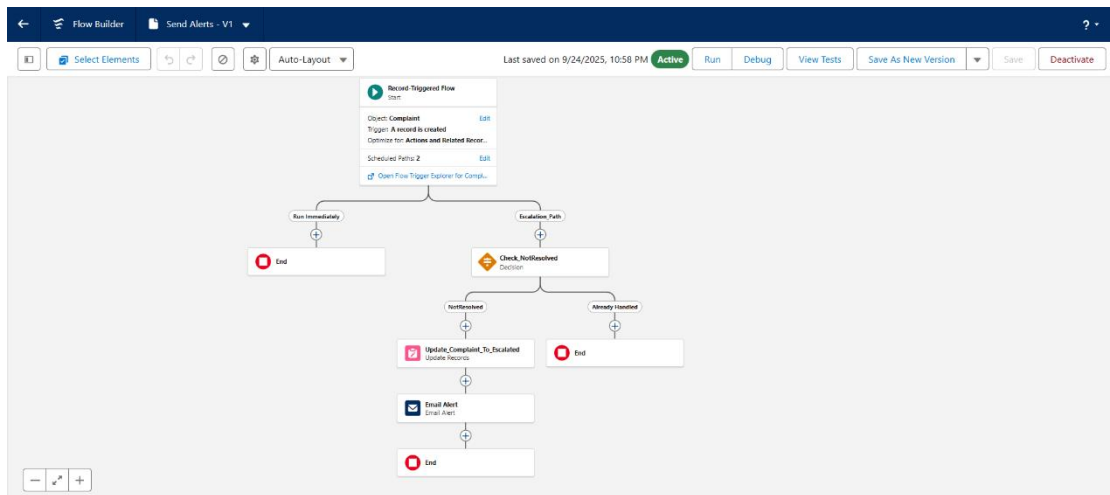
2. Email Alerts

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

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."

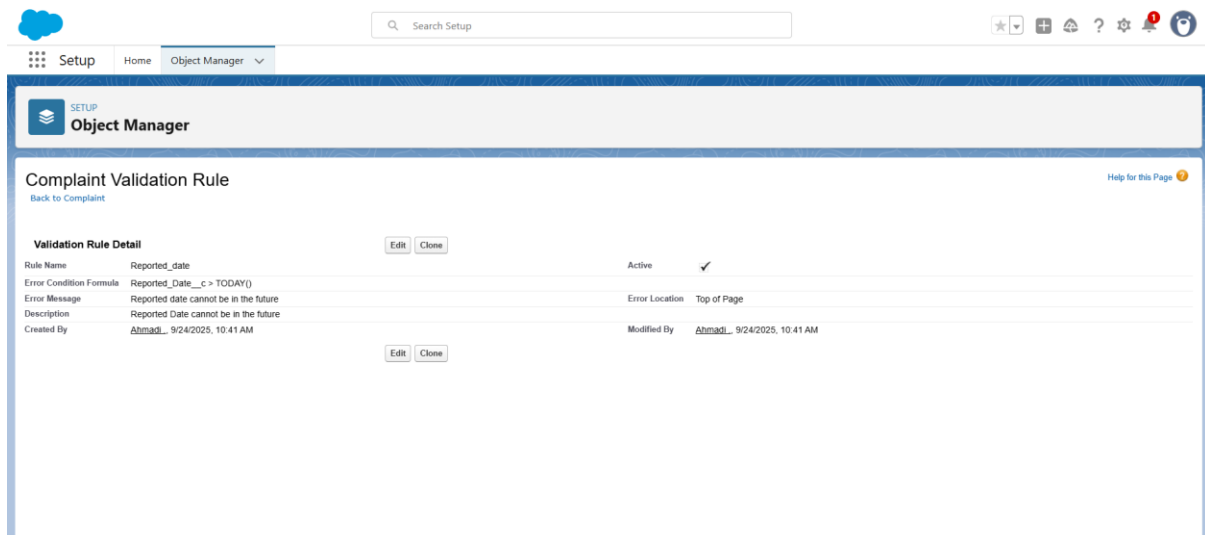3. **Reported Date cannot be in the future:**

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

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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 →

    o Subject: "Supervisor to review high priority complaint"

    o Assigned To: Supervisor

    o Related To: Complaint record

    o Due Date: Today + 1 day

Deliverables:

- Screenshot of Process Builder