**Phase 4: Automation & Logic**

**Objective:**

The goal of this phase was to automate the key business processes defined in the project's requirements document, handling case management from initial routing to final escalation to improve efficiency and enforce business rules.

**Completed Actions:**

* **Case Queues for Team-Based Assignment:** Two **Case Queues** were created (Card Support Queue and Loan Support Queue) to function as shared inboxes for the different support teams. This ensures that cases are owned by a team rather than an individual, preventing delays.
* **Automated Case Routing with Flow:** A **Record-Triggered Flow** was built to automate the routing of new cases. The flow checks the Case Sub-Category and automatically assigns the case to the appropriate queue, fulfilling the requirement to route cases to the right department without manual intervention.
* **Automated Escalation for Urgent Cases:** An **Escalation Rule** was created to handle sensitive and urgent cases, specifically "Transaction Disputes". The rule automatically reassigns any high-priority dispute case to the "Bank Manager" if it is not resolved within 3 hours, ensuring compliance with service level agreements (SLAs).





