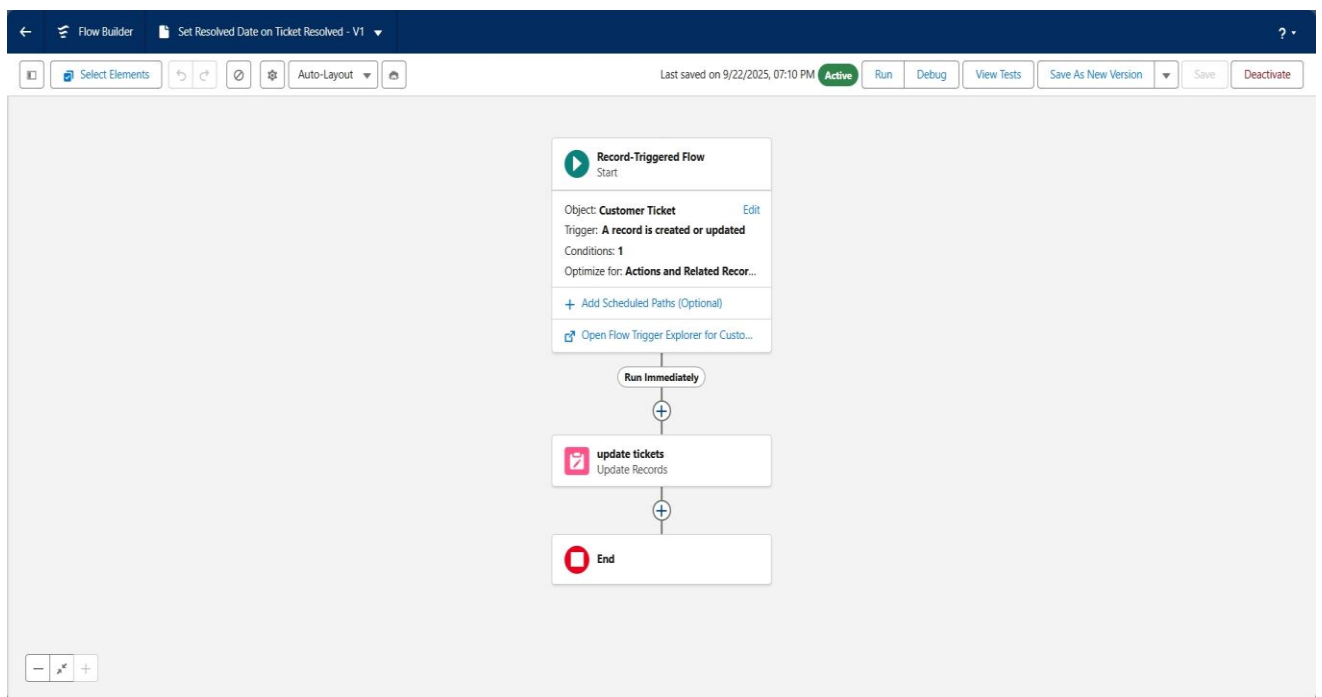# Customer Support Ticketing System

PHASE 4: Process Automation (Admin)

1. **Flow Builder**

   Flow Implementations

   a. Setup → Flow → New Flow
   b. Choose **Flow Type**: Record-Triggered / Screen / Scheduled
   c. Select **Object**: Ticket
   d. Define **Trigger Criteria**: e.g., Ticket created or updated
   e. Add **Elements**:
      Update Records
   f. Save → Activate

2. Email Alerts

Send automated emails based on workflows, processes, or flows.

- A ticket is assigned to an agent.

- **Who gets it:** The assigned support agent (User).
- **Purpose:** Notify the agent that they have a new ticket to work on.
- **Message content:** Ticket number, subject, customer name, priority, link to the record.
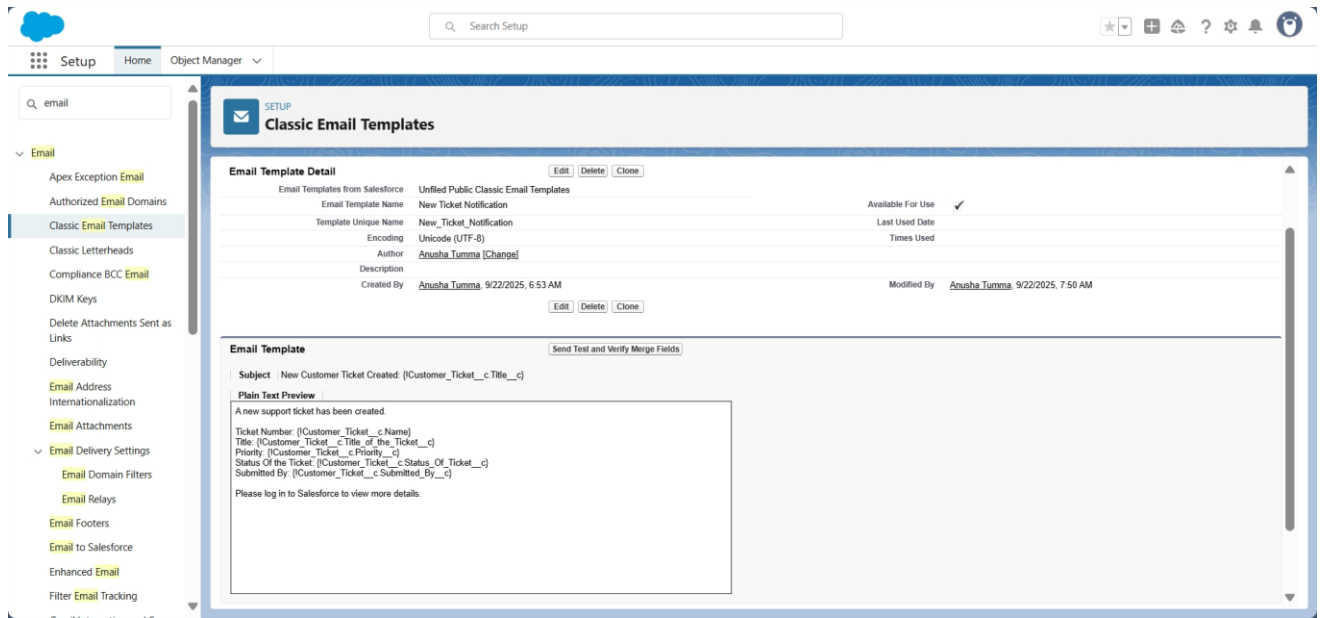
3. Apex Email Notifications

- When a **ticket is created/updated.**
- An **email notification** is sent to either the **customer** or the **support agent.**
- The email contains the **essential ticket details**.
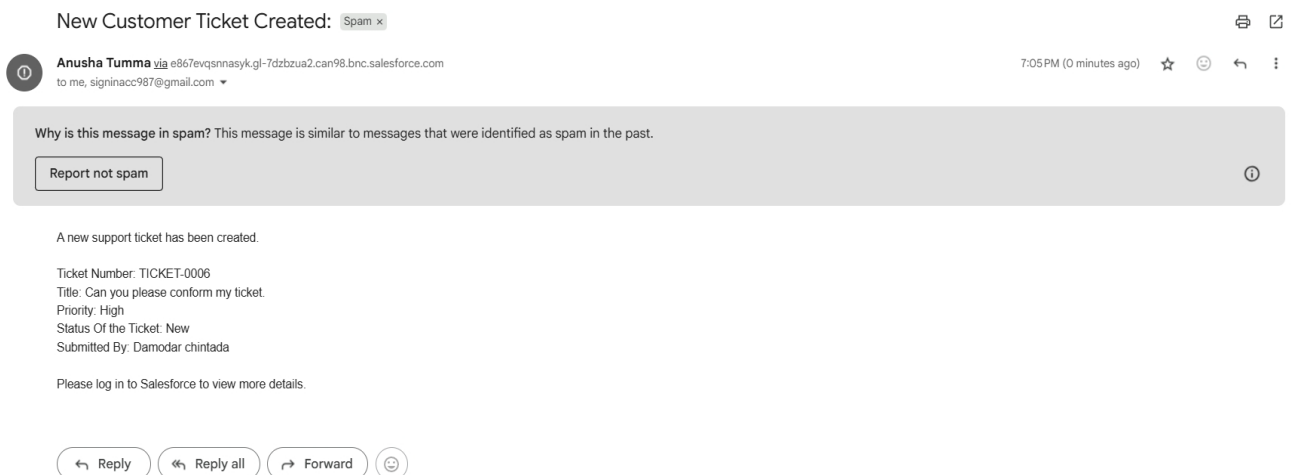
4. Profiles, Roles & Sharing

a. Role Hierarchy

- Support Manager
- Support Agent
- Customer

b. Profiles

- **Support Manager Profile**
  - Full access to **Tickets, Accounts, Contacts**.
  - Can approve/reassign tickets.
  - Has access to management dashboards & reports.
- **Support Agent Profile**
  - Read/Create/Edit access to **Tickets assigned to them**.
  - Read-only access to **Accounts & Contacts**.

c. Sharing Settings

- **Tickets**:
  - Default → Private.
  - Role hierarchy allows managers to see subordinate's tickets.