

Phase 4: Process Automation (Admin)

The goal of this phase was to automate complaint handling using Salesforce declarative automation tools like Flows, Approval Processes, Email Alerts, Validation Rules, and more. This ensures complaints move smoothly through the system, deadlines are met, and citizens are informed.

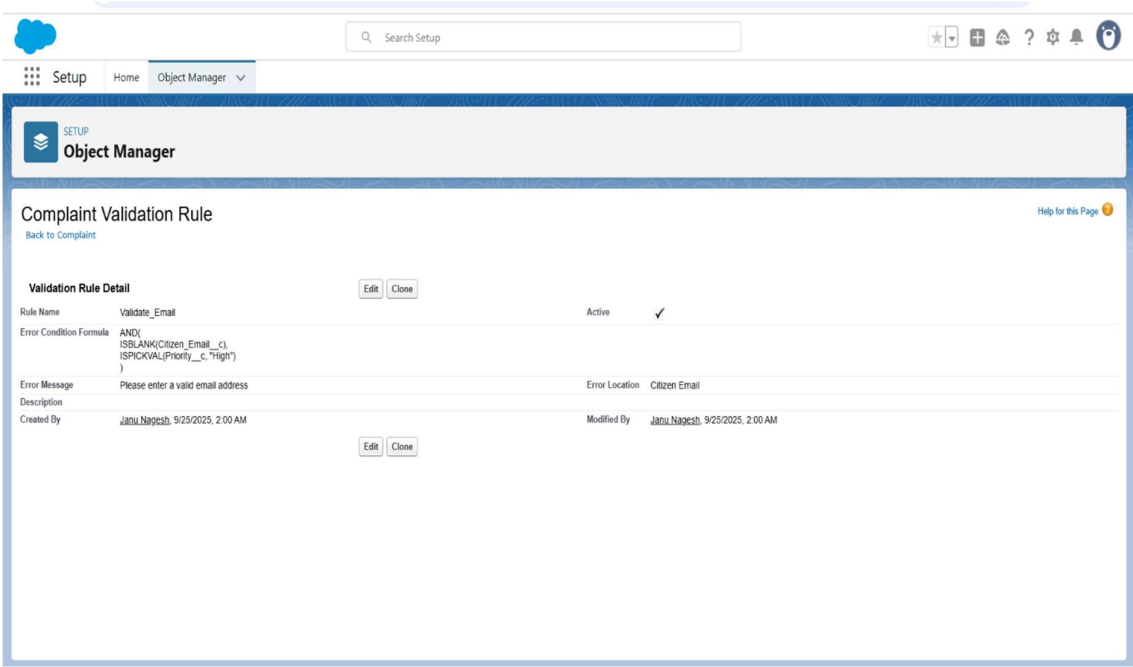
1. Validation Rules

- **Purpose:** Prevent invalid or incomplete data entry.
- **Implemented Rule:**
 - **Priority cannot be blank when Status = New.**
 - **Formula:**

```
AND(  
  ISBLANK(TEXT(Priority__c)),  
  ISPICKVAL(Status__c, "New")  
)
```

If a user tries to save a Complaint with Status = New but no Priority selected → error message is shown.

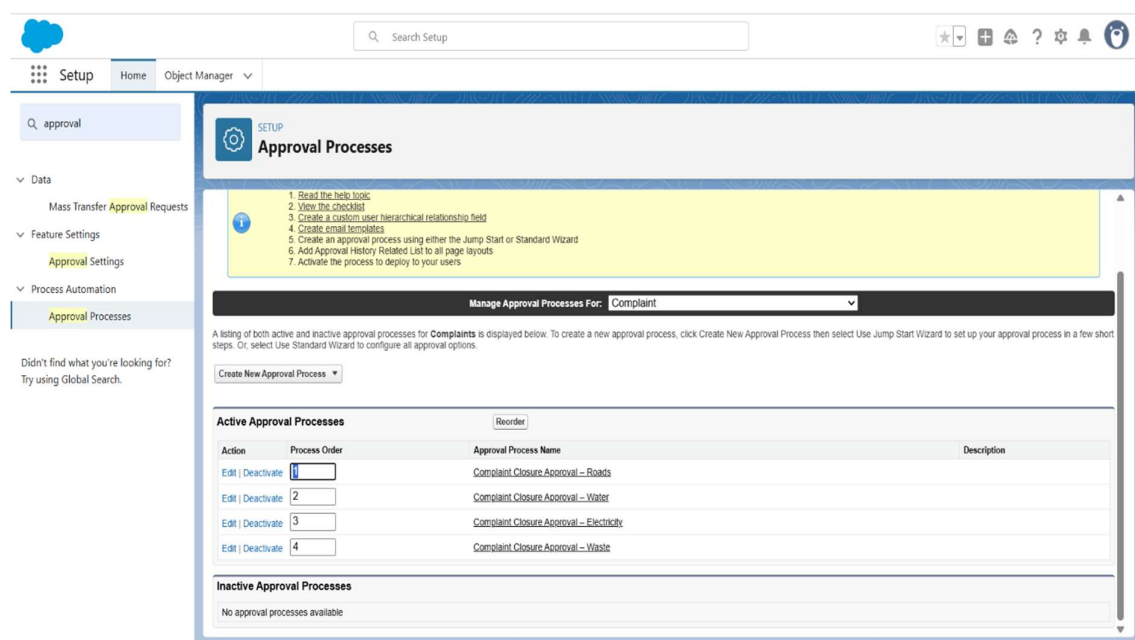
Result: Ensures important fields are filled early in the complaint lifecycle.



2.Approval Process

- **Process Name:** Complaint Closure Approval.
- **Objective:** Prevent complaints from being closed without approval.
- **Details:**
 - **Criteria:** Status = Resolved.
 - **Approver:** Department Manager Role (e.g., Roads Manager, Water Manager).
 - **Final Action:** Update Complaint Status = Closed.

Result: Adds accountability, only managers can close complaints.

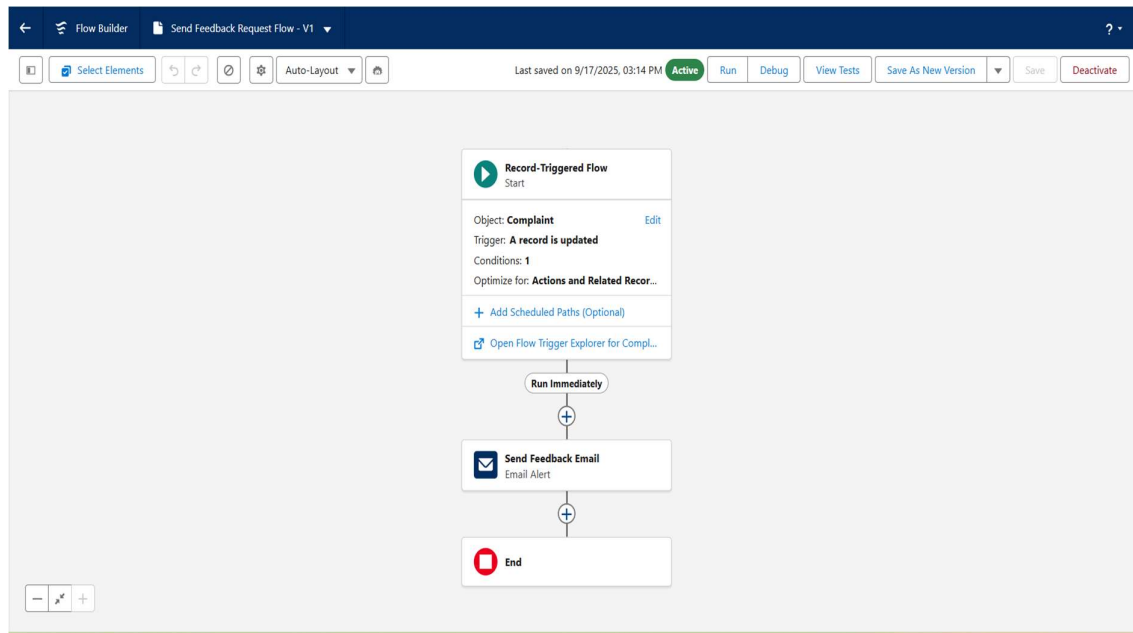


3.Flows

Flows were the main automation tool used.

Record-Triggered Flow

- **Object:** Complaint__c
- **Trigger:** On Create (Before Save).
- **Logic:** If Department = Roads, assign to Roads Queue. Same for Water, Electricity, Waste.
- **Result:** Auto-routing of complaints to correct department.



4.Email Alerts

- Templates Created:
 - Complaint Resolved Notification
 - Feedback Request (links to portal for rating & comments).
- Used inside Flows for automation.

The screenshot shows the 'Email Alerts' setup page. The main section is titled 'Email Alert' and 'Send Feedback Request on Resolution'. It includes a table with the following details:

Email Alert Detail		Email Template	
Description	Send Feedback Request on Resolution	Email Template	Complaint Resolution Feedback
Unique Name	Send_Feedback_Request_on_Resolution	Object	Complaint
From Email Address	Current User's email address		
Recipients	Email Field: Citizen Email		
Additional Emails			
Created By	Janu Nagesh	Modified By	Janu Nagesh
	9/17/2025, 2:38 AM		9/21/2025, 4:10 AM

Below the table, there are three sections:

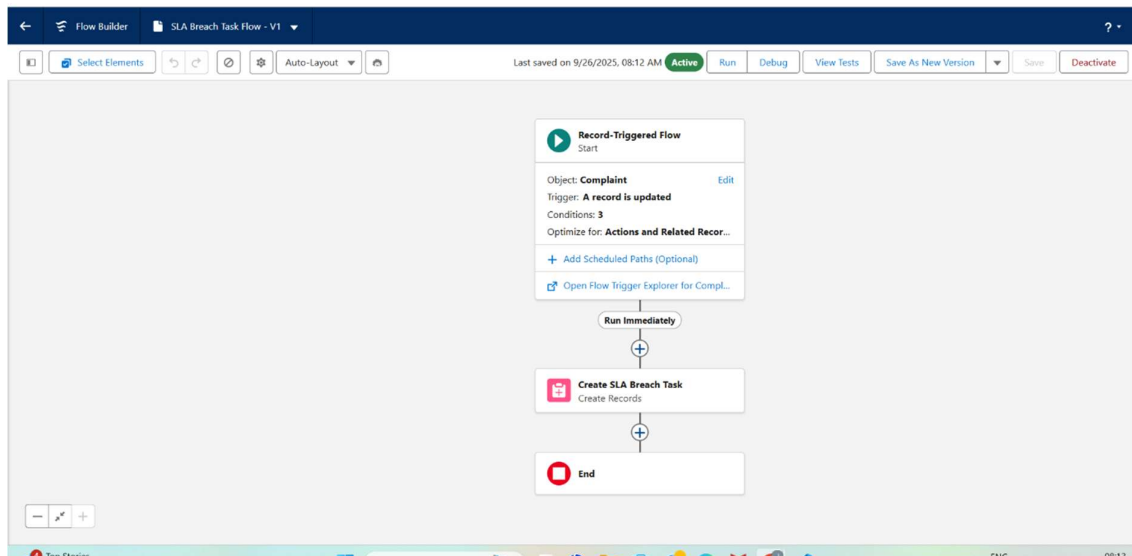
- Rules Using This Email Alert**: This alert is currently not used by any rules.
- Approval Processes Using This Email Alert**: This alert is currently not used by any approval processes.
- Entitlement Processes Using This Email Alert**: This alert is currently not used by any entitlement processes.

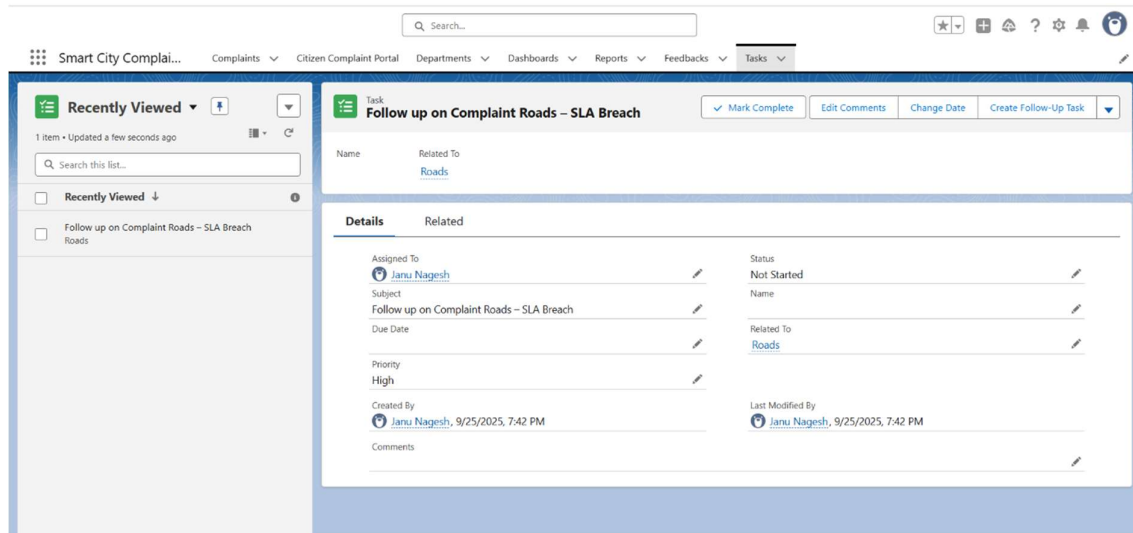
5.Field Updates

- **Automated Updates:**
 - Status auto-changes via Flows:
 - New → In Progress → Escalated → Resolved → Closed
 - SLA Due Date auto-set in Apex (dynamic based on Department/Priority).
- **Result:** Reduces manual updates and enforces complaint lifecycle.

6.Tasks

- Added **Task creation in Flow** when SLA is breached.
- Assigned Task = City Admin.
- Task includes: “Follow up on Complaint ID {n} – SLA Breach”.
- **Result:** Admins always have actionable tasks when issues are overdue.





Final Outcome of Phase 4

- Automated complaint assignment, status tracking, SLA escalation, approval before closure, and citizen communication.
- Reduced manual intervention and improved accountability.