

# Phase 1: Problem Understanding & Industry Analysis

## Requirement Gathering

The Urban Issue Management System is designed to streamline and automate the process of reporting, tracking, and resolving urban infrastructure issues (such as potholes, streetlight outages, garbage problems, playground maintenance, and traffic signal malfunctions). The primary goal is to provide a responsive, transparent, and efficient mechanism for citizens to report problems, for staff to manage and resolve them, and for supervisors and city management to monitor performance and trends.

Key requirements identified include:

- Citizens need a simple and accessible way to submit urban issues, specifying details such as location, type, and description.
- Each issue must be routed to the appropriate department for resolution based on type and location.
- Staff and supervisors require a centralized platform to track the progress of each reported issue.
- Automated assignment of priority and escalation for urgent or critical issues is essential.
- Timely notifications and communications (e.g., email alerts) are required for both citizens and staff.
- The system must support reporting and analytics for operational oversight and continuous improvement.

## Stakeholder Analysis

The main stakeholders for this project are:

- Citizens: Individuals who identify and report urban issues within the city limits. Their experience should be straightforward and transparent, with notification at each major status change.
- City Staff: Employees responsible for investigating and resolving reported issues. This includes field workers, department representatives, and supervisors.
- Supervisors/Managers: Oversee department performance, approve certain issues (especially urgent or costly ones), and manage escalations.

- City Management: Responsible for oversight, policy, and resource allocation, requiring dashboards and analytics.
- IT/Admin Team: Maintains the system, adapts processes, and manages integrations with other city systems.

Understanding the needs and workflows of each group is essential to the solution's success.

## Business Process Mapping

The current (as-is) process is typically manual or semi-automated, involving phone calls, paper forms, or siloed apps. Issues can be lost, delayed, or tracked inefficiently. The proposed (to-be) process, enabled by Salesforce, is as follows:

1. Citizen submits a new urban issue via a portal or mobile app.
2. The system captures details, assigns a unique issue number, and automatically routes it to the relevant department based on the type and location.
3. Priority is automatically set according to predefined rules (e.g., urgent for main roads or hazardous locations).
4. Staff receive notification and a task for follow-up.
5. Supervisors are notified for approval if the issue is urgent or high-cost.
6. Issue status updates are communicated back to the citizen.
7. The system provides real-time dashboards and reports for management oversight.

This streamlined process reduces delays, increases accountability, and enhances citizen satisfaction.

## Industry-Specific Use Case Analysis

Municipalities worldwide face similar challenges in managing urban infrastructure issues. Common pain points include lack of transparency, slow response times, poor communication with citizens, and difficulty in tracking performance. Industry best practices increasingly focus on digital transformation, citizen engagement, mobile accessibility, and data-driven insights.

Our solution draws inspiration from leading smart-city initiatives, leveraging Salesforce's platform capabilities for automation, notification, and analytics. The system is designed to be scalable, adaptable for future needs (such as IoT sensor integration or AI-driven prioritization), and compliant with municipal data policies.

# AppExchange Exploration

To accelerate delivery and maximize value, the project explored relevant Salesforce AppExchange solutions for:

- Citizen service request management
- Field service scheduling and optimization
- GIS and mapping integrations
- Prebuilt dashboards and analytics for city operations

While several apps offer useful features, most are either too generic or lack the specific process customizations required for our city's needs. As a result, a custom Salesforce implementation, with selective use of AppExchange components for notifications or mapping, is chosen as the optimal path.

## PHASE 2 – Org Setup & Configuration (Urban Issue Management System)

### Company Profile Setup

The foundational org settings were configured under Setup → Company Information → Edit for the Urban Issue Management System.

- Name: Urban Issue Management System
- Time Zone: GMT+05:30 Asia/Kolkata
- Locale: English (India)
- Language: English, Currency: INR

The screenshot shows the 'Company Information' setup page for the organization 'Crowdsourced Smart City Issue Tracking System'. The page includes sections for Organization Detail, Licenses, and various configuration options like newsletter settings and API limits. Key details shown include the phone number (630) 086-4973, default locale (English (India)), and developer edition (USA1044). The page also lists usage statistics for API requests and streaming events.

Organization Detail		Licenses	
Organization Name	Crowdsourced Smart City Issue Tracking System	Phone	(630) 086-4973
Primary Contact	Koppada Prudhvi Vinayak	Fax	
Division		Default Locale	English (India)
Address	Kakinada 533002 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Telugu (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	402 KB (8%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Df0000008q2U9
		Organization Edition	Developer Edition
		Instance	USA1044

Created By: OrgFarm\_EPIC, 9/19/2025, 5:28 PM      Modified By: Koppada.Prudhvi.Vinayak, 9/26/2025, 8:22 AM

# Business Hours & Holidays

Standard business hours were configured to match city/municipal operating hours for case routing and SLA calculations.

- Path: Setup → Business Hours → New
- Name: Urban Issue Standard Hours
- Time Zone: GMT+05:30 Asia/Kolkata
- Working Hours: Monday–Friday, 9:00 AM–6:00 PM
- Holidays: City government holidays and national holidays added for accurate service calculations.

The screenshot displays the 'Organization Business Hours' configuration screen. At the top, there's a header with a 'SETUP' button and a 'Business Hours' title. Below the header, a sub-header reads 'Organization Business Hours'. A note says: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.' Another note states: 'If you enter blank business hours for a day, that means your organization does not operate on that day.' A 'Help for this Page' link is in the top right corner.

**Business Hours Detail**

Business Hours Name	City Services Hours	Time Zone	Default Business Hours
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

Below the table, status information includes 'Active' checked, 'Created By' (Koppada Prudhvi Vinayak), 'Created Date' (9/24/2025, 10:40 AM), 'Last Modified By' (Koppada Prudhvi Vinayak), and 'Last Modified Date' (9/24/2025, 10:40 AM). An 'Edit' button is also present.

**Holidays**

No records to display

Always show me **more** records per related list

# Fiscal Year Setup

The fiscal year was set to standard to align with municipal reporting cycles.

- Path: Setup → Fiscal Year
- Type: Standard Fiscal Year

- Start Month: January

The screenshot shows the 'Fiscal Year' setup page. On the left, there's a sidebar with 'Standard Fiscal Year' selected. The main area has a title 'Organization Fiscal Year Edit: Crowdsourced Smart City Issue Tracking System'. Below it, a note says 'To specify the fiscal year type for your organization, choose one of the options below.' A 'Fiscal Year Information' section explains how to change the fiscal year start month. A warning message in a yellow box states: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.' A 'Change Fiscal Year Period' dialog box is open, showing 'January' as the 'Fiscal Year Start Month' and 'The ending month' as the 'Fiscal Year is Based On' option.

## User Setup (Profiles, Roles, Permission Sets, Users)

### Profiles

- Setup → Users → Profiles.
- Cloned "Standard User" profile as Department Staff.
- Cloned again as Department Head.
- (Optional) Created "Citizen" profile for future Experience Cloud/portal use.
- Assigned these profiles to the corresponding users.

<input type="checkbox"/> <a href="#">Edit   Del  ...</a> <a href="#">Department Head</a>	Salesforce
<input type="checkbox"/> <a href="#">Edit   Del  ...</a> <a href="#">Department Staff</a>	Salesforce

### Roles

- Setup → Users → Roles.
- Created the following hierarchy:
  - City Admin (top, reports to CEO)
  - Department Head (reports to City Admin)
  - Department Staff (reports to Department Head)
- Assigned these roles to the users created earlier.

The screenshot shows the 'SETUP Roles' page. At the top, there's a header with a user icon and the text 'SETUP Roles'. Below the header, a section titled 'Creating the Role Hierarchy' contains a message: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' A 'Help for this Page' link with a question mark icon is also present. The main content area is titled 'Your Organization's Role Hierarchy' and shows a tree view of roles under 'Crowdsourced Smart City Issue Tracking System'. The tree includes nodes for CEO, CFO, City Admin, Department Head, Department Staff, COO, SVP Customer Service & Support, SVP Human Resources, and SVP Sales & Marketing, each with 'Edit', 'Del', and 'Assign' options. A 'Collapse All' and 'Expand All' button is at the top left, and a 'Show in tree view' dropdown is at the top right.

## Permission Sets

- Setup → Users → Permission Sets.
- Created Department Extended Access permission set.
  - Checked "Export Reports" and "Run Reports" under System Permissions.
- Assigned this permission set to department users (e.g., Ravi Kumar, Sita Sharma).

## User Setup & Licenses

- Setup → Users → Users.
- Created users for:
  - System Administrator (yourself)
  - Department Heads (e.g., Ravi Kumar)
  - Department Staff (e.g., Sita Sharma)
- Assigned “Standard User” or custom profile (created in next step).
- Set role to be assigned after roles were created.

The screenshot shows the Salesforce Setup - Users page. At the top, there's a header with a user icon and the text "SETUP" and "Users". Below the header, a message says "All Users" and "On this page you can create, view, and manage users." A "Help for this Page" link is also present. The main content area has a "View" dropdown set to "All Users" and a "Create New View" button. Below this is a navigation bar with links for "A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All". There are three buttons at the top of the list: "New User", "Reset Password(s)", and "Add Multiple Users". The list itself has columns for "Action", "Full Name", "Alias", "Username", "Role", "Active", and "Profile". Each row contains a checkbox, the user's name, their alias, their username, their role (e.g., Citizen, Chatter Free User, System Administrator, Department Head, City Admin, Department Staff), whether they are active (indicated by a checkmark), and their profile (e.g., Citizen, Chatter Free User, System Administrator, Department Head, City Admin, Department Staff, Analytics Cloud Integration User, Analytics Cloud Security User).

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Agarwal, Priya	Pagarwal	priya.agarwal@citizen.com	Citizen	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00df000008q2u9eai.cfkchvzpz7g@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	EPIC_OrgFarm	OEPIC	epic.14028bef1cad@orgfarm.salesforce.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Kumar, Ravi	rkuma	ravi.kumar@city.gov.in	Department Head	<input checked="" type="checkbox"/>	Department Head
<input type="checkbox"/>	Prudhvi Vinayak_Koppada	vin	vinayak22436141@agentforce.com	City Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Sharma, Sita	sshar	sita.sharma@city.gov.in	Department Staff	<input checked="" type="checkbox"/>	Department Staff
<input type="checkbox"/>	User_Integration	integ	integration@00df000008q2u9eai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00df000008q2u9eai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## Org-Wide Defaults (OWD)

- Setup → Security → Sharing Settings.
- Set Org-Wide Defaults (Default Internal Access) for:
  - Department: Public Read Only
  - Urban Issue: Private
  - Citizen: Private
  - Feedback: Private
- Saved the changes.
- Note: Default External Access left unchanged (no community/portal users yet).

## Login Access Policies

- Setup → Security → Login Access Policies.
- Enabled “Administrators Can Log in as Any User”.

## Dev Org Setup

- All steps performed in a Salesforce Developer Edition org.

## Sandbox Usage

- Developer Edition org used; no sandboxes available.

- Noted in docs that for production, sandboxes and change sets/SFDX would be used for testing/deployment.

# PHASE 3 – Data Modeling & Relationships (Urban Infrastructure Issue Reporting)

## Standard & Custom Objects

The data model leverages both standard and custom objects to create a scalable, government-centric application.

Standard Objects:

- User: Represents city staff, department heads, and system administrators who manage issues and oversee departments.

Custom Objects:

Four custom objects form the backbone of the solution:

- Department: Represents each city or municipal department responsible for handling reported issues (e.g., Sanitation, Public Works, Utilities).

The screenshot shows the Salesforce Object Manager interface for the 'Department' object. The top navigation bar says 'SETUP > OBJECT MANAGER' and the page title is 'Department'. On the left, there's a sidebar with various tabs: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area has two columns: 'Details' and 'Advanced'. The 'Details' column contains fields for Description, API Name (set to 'Department\_\_c'), Singular Label (set to 'Department'), and Plural Label (set to 'Departments'). The 'Advanced' column contains settings for Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (set to 'Deployed'), and Help Settings (set to 'Standard salesforce.com Help Window'). At the bottom right of the main area are 'Edit' and 'Delete' buttons.

- **Urban\_Issue:** Captures all reported urban issues, including details like status, type, location, and assigned department.

The screenshot shows the 'Object Manager' interface for the 'Urban Issue' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main 'Details' tab is selected. The right panel displays the following configuration details:

Setting	Value
Description	
API Name	Urban_Issue__c
Custom	✓
Singular Label	Urban Issue
Plural Label	Urban Issues
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

- **Citizen:** Stores information about citizens who report issues (name, contact details, government ID, etc.).

The screenshot shows the 'Object Manager' interface for the 'Citizen' object. The left sidebar lists the same configuration tabs as the Urban\_Issue object. The main 'Details' tab is selected. The right panel displays the following configuration details:

Setting	Value
Description	
API Name	Citizen__c
Custom	✓
Singular Label	Citizen
Plural Label	Citizens
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

- **Feedback:** Collects feedback and ratings from citizens about the quality and timeliness of issue resolution.

SETUP > OBJECT MANAGER Feedback	
Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name <b>Feedback_c</b>
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label <b>Feedback</b>
Field Sets	Plural Label <b>Feedbacks</b>
Object Limits	
Record Types	
Related Lookup Filters	Enable Reports ✓
Search Layouts	Track Activities ✓
List View Button Layout	Track Field History ✓
Restriction Rules	Deployment Status Deployed
Scoping Rules	Help Settings Standard salesforce.com Help Window
Object Access	

- Staff: Helps to Track the staff information.

SETUP > OBJECT MANAGER Staff	
Details	
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name <b>Staff_c</b>
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label <b>Staff</b>
Field Sets	Plural Label <b>Staffs</b>
Object Limits	
Record Types	
Related Lookup Filters	Enable Reports ✓
Search Layouts	Track Activities ✓
List View Button Layout	Track Field History ✓
Restriction Rules	Deployment Status Deployed
Scoping Rules	Help Settings Standard salesforce.com Help Window
Object Access	

## Fields & Relationships

Custom fields capture essential data, and lookup relationships create the necessary links between objects.

Relationships:

- Urban\_Issue → Department: Lookup relationship; each urban issue is assigned to a department based on type/location.
- Urban\_Issue → Citizen: (Future/optional) Lookup relationship, if issues are to be directly linked to the reporting citizen (not yet implemented).

- Feedback → Citizen: Lookup relationship; feedback is tied to the citizen who submitted it.
- Feedback → Urban\_Issue: Lookup relationship; feedback is tied to the resolved urban issue.
- Department → Department Head: Lookup to User; identifies the supervisor/manager for each department.

## Custom Fields:

### *On Department:*

- Department\_Code (Text)
- Department\_Email (Email)
- Department\_Head (Lookup to User)
- Phone\_Number (Phone)

SETUP > OBJECT MANAGER <b>Department</b>					
Details	Fields & Relationships 8 Items, Sorted by Field Label				
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Department Code	Department_Code__c	Text(10)		
Buttons, Links, and Actions	Department Email	Department_Email__c	Email		
Compact Layouts	Department Head	Department_Head__c	Lookup(User)	✓	
Field Sets	Department Name	Name	Text(80)	✓	
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Owner	OwnerId	Lookup(User,Group)	✓	
Related Lookup Filters	Phone Number	Phone_Number__c	Phone		
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Object Access					

### *On Urban\_Issue:*

- Issue\_Title (Text)
- Description (Long Text Area)
- Location (Text)
- Status (Picklist: New, In Progress, Resolved, Closed)
- Department (Lookup to Department)
- Department\_Name (Text, for sharing rule workaround)

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Assigned Staff	Assigned_Staff__c	Lookup(Staff)		✓
Lightning Record Pages	Citizen	Citizen__c	Lookup(Citizen)		✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Department	Department__c	Lookup(Department)		✓
Field Sets	Department Name	Department_Name__c	Text(80)		
Object Limits	Description	Description__c	Long Text Area(32768)		
Record Types	Issue Number	Name	Auto Number		✓
Related Lookup Filters	Issue Title	Issue_Title__c	Text(80)		
Search Layouts	Issue Type	Issue_Type__c	Picklist		
List View Button Layout	Last Modified By	LastModifiedById	Lookup(User)		
Restriction Rules	Location	Location__c	Text(255)		
Scoping Rules	Location Type	Location_Type__c	Picklist		
Object Access	Owner	OwnerId	Lookup(User/Group)		✓
Triggers	Priority	Priority__c	Picklist		
Flow Triggers	Staff	Staff__c	Lookup(Staff)		✓
Validation Rules	Status	Status__c	Picklist		
Conditional Field Formatting					

### On Citizen:

- Email (Email)
- Phone\_Number (Phone)
- Address (Text Area)
- Government\_ID (Text)

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Address	Address__c	Text Area(255)		
Lightning Record Pages	Citizen Name	Name	Text(80)		✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Email	Email__c	Email		
Field Sets	Government ID	Government_ID__c	Text(20)		
Object Limits	Last Modified By	LastModifiedById	Lookup(User)		
Record Types	Owner	OwnerId	Lookup(User/Group)		✓
Related Lookup Filters	Phone Number	Phone_Number__c	Phone		
Search Layouts					
List View Button Layout					

### On Feedback:

- Feedback\_Text (Long Text Area)
- Rating (Picklist: 1, 2, 3, 4, 5)
- Citizen (Lookup to Citizen)
- Urban\_Issue (Lookup to Urban\_Issue)

Fields & Relationships					8 Items, Sorted by Field Label	Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED					
Page Layouts	Citizen	Citizen__c	Lookup(Citizen)		✓					
Lightning Record Pages	Created By	CreatedById	Lookup(User)		✓					
Buttons, Links, and Actions	Feedback Number	Name	Auto Number		✓					
Compact Layouts	Feedback Text	Feedback_Text__c	Long Text Area(32768)		✓					
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		✓					
Object Limits	Owner	OwnerId	Lookup(User,Group)		✓					
Record Types	Rating	Rating__c	Picklist		✓					
Related Lookup Filters	Urban Issue	Urban_Issue__c	Lookup(Urban Issue)		✓					
Search Layouts										
List View Button Layout										
Restriction Rules										

## User Interface & Layouts

To ensure a user-friendly and efficient on-screen experience:

### Page Layouts:

A dedicated page layout was created and customized for each custom object (Department, Urban Issue, Citizen, Feedback), organizing fields for easy data entry and review.

The screenshot shows the 'Department' object's page layout configuration in the Salesforce setup. The left sidebar lists various customization options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The 'Page Layouts' section is selected. The main area shows the 'Layout Properties' tab for the 'Blank Space' page layout. It includes sections for 'Fields' (Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts), 'Salesforce Mobile and Lightning Experience Actions' (with a note about overriding predefined actions), 'Department Detail' (with standard buttons like Edit, Delete, Clone, Change Owner, etc.), and sections for 'Information', 'System Information', and 'Custom Links'. The 'Information' section contains fields for Department Name, Email, Phone Number, and Head, all set to 'Sample Text'. The 'System Information' section has fields for Created By and Last Modified By, also set to 'Sample Text'.

**SETUP > OBJECT MANAGER**

### Urban Issue

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Object Access  
Triggers  
Flow Triggers  
Validation Rules

Fields  
Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists  
Report Charts

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Urban Issue Detail

Information (Header visible on edit only)		Standard Buttons		Custom Buttons	
Issue Number	GEN-2004-001234	Owner	Sample Text		
Issue Title	Sample Text				
Description	Sample Text				
Location	Sample Text				
Status	Sample Text				
Department	Sample Text				
Department Name	Sample Text				
Issue Type	Sample Text				
Citizen	Sample Text				
Priority	Sample Text				
Location Type	Sample Text				
Staff	Sample Text				
Assigned Staff	Sample Text				

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

**SETUP > OBJECT MANAGER**

### Citizen

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Object Access  
Triggers  
Flow Triggers  
Validation Rules

Fields  
Buttons  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists  
Report Charts

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Citizen Detail

Information (Header visible on edit only)		Standard Buttons		Custom Buttons	
* Citizen Name	Sample Text	Owner	Sample Text		
Email	sarah.sample@company.com				
Phone Number	1-415-555-1212				
Address	Sample Text				
Government ID	Sample Text				

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

## Compact Layouts:

A compact layout was configured for each custom object to display key fields in the highlights panel and on mobile.

- *Example (Urban\_Issue):* Compact layout includes Issue\_Title, Status, and Department.

## Record Types:

A single record type is used for each object at this stage.

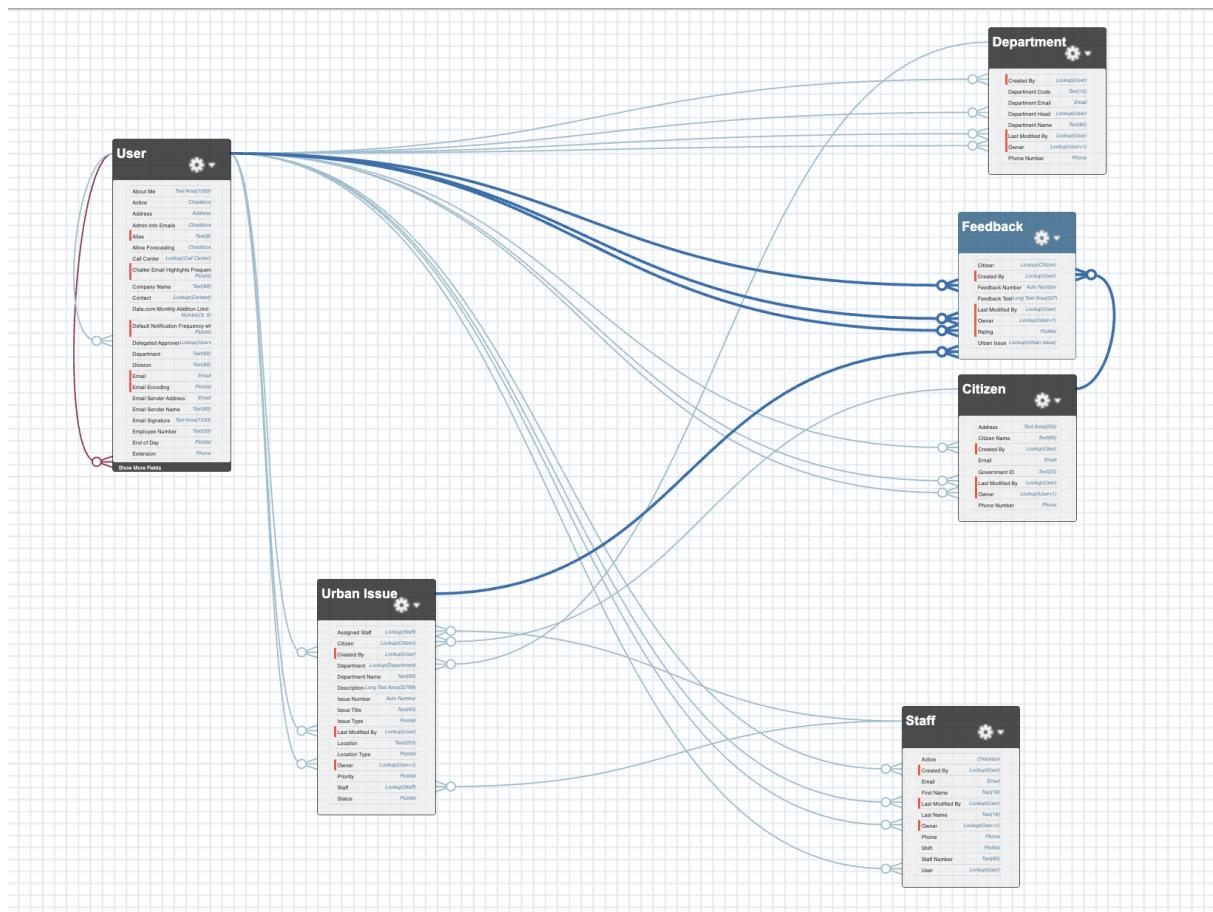
(Future enhancement: Add record types to Urban\_Issue for different issue categories or reporting sources.)

# Data Architecture

## Schema Builder:

The data model was visualized using Schema Builder, clearly showing:

- Department at the center with lookups from Urban\_Issue.
- Citizen object connected to Feedback (and optionally Urban\_Issue).
- Feedback object with lookups to both Citizen and Urban\_Issue.



# PHASE 4 - Process Automation (Admin)

The goal of this phase is to use Salesforce's declarative tools to automate the core business logic, enforce data quality, and handle notifications for the Urban Issue Management project.

# 1. Validation Rules

Purpose:

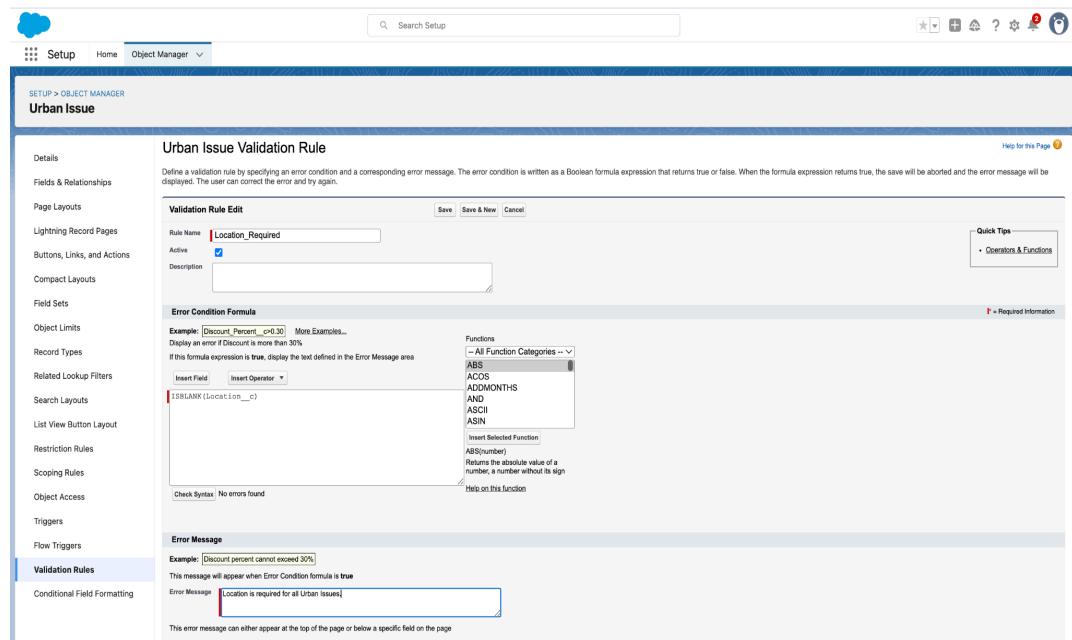
Ensure that Urban Issues have correct and complete data before saving.

Object: Urban\_Issue\_\_c

Implemented Examples:

- Location Required

- Formula: ISBLANK(Location\_\_c)
- Error Message: "Location is required for all Urban Issues."



\* = Required Information

### Information

Issue Number

Issue Title

Garbage issue

Description

Location

Location Type

Bus Stop/Transit Point

Issue Type

Garbage

Ø We hit a snag.

Review the errors on this page.

- Location is required for all Urban Issues.

Owner

 Koppada Prudhvi Vinayak

Department

Search Departments...



Status

--None--



Priority

Urgent

Citizen

Search Citizens...



Staff

Search Staffs...



Assigned Staff

Search Staffs...



Cancel

Save & New

Save

Object: citizen\_\_c

Implemented Examples:

- Require\_Government\_ID
  - **Formula:** ISBLANK( Government\_ID\_\_c )
  - **Error Message:** "Government ID is required".

## Citizen Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save displayed. The user can correct the error and try again.

**Validation Rule Edit**

**Rule Name:** Require\_Government\_ID

**Active:**

**Description:** (empty)

**Error Condition Formula**

Example: Discount\_Percent\_c > 0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign  
[Help on this function](#)

**Check Syntax**

**Error Message**

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: Government ID is required.

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page  Field Government ID

## New Citizen

\* = Required Information

**Information**

\* Citizen Name: shiva

Email: shiva@gmail.com

Phone Number: (empty)

Address: (empty)

Owner: Koppada Prudhvi Vinayak

Government ID: (red box with a red circle icon)

We hit a snag.

Review the following fields

- [Government ID](#)

## 2. Workflow Rules

Purpose:

Automate simple field updates without code.

Object: Urban\_Issue\_\_c

## Implemented Example:

- Auto-update Status to "In Progress" when Priority = Urgent
  - Rule Criteria: Priority\_c equals 'Urgent'
  - Workflow Action: Field Update → Status = "In Progress"

The screenshot shows the 'Workflow Rule Detail' page for the rule 'Urgent\_Issue\_Auto\_In\_Progress'. The rule is active and set to trigger on 'Urban Issue' when it's created or edited. It has one immediate workflow action: 'Field Update' where 'Status' is set to 'In Progress'. A note at the bottom indicates that time triggers cannot be added to active rules.

Workflow Rule Detail
Rule Name: Urgent_Issue_Auto_In_Progress
Active: ✓
Description: Urban Issue: Priority EQUALS Urgent
Created By: Koppada Prudhvi Vinayak, 9/30/2025, 8:07 AM
Object: Urban Issue
Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Modified By: Koppada Prudhvi Vinayak, 9/30/2025, 8:08 AM

Workflow Actions	
Immediate Workflow Actions	
Type: Field Update	
Description: Set Status to In Progress	
Time-Dependent Workflow Actions	
See an example	
⚠ You cannot add new time triggers to an active rule. Deactivate This Rule	

## 3. Flow Builder (Record-Triggered Flow)

Tool: Flow Builder (Record-Triggered Flow)

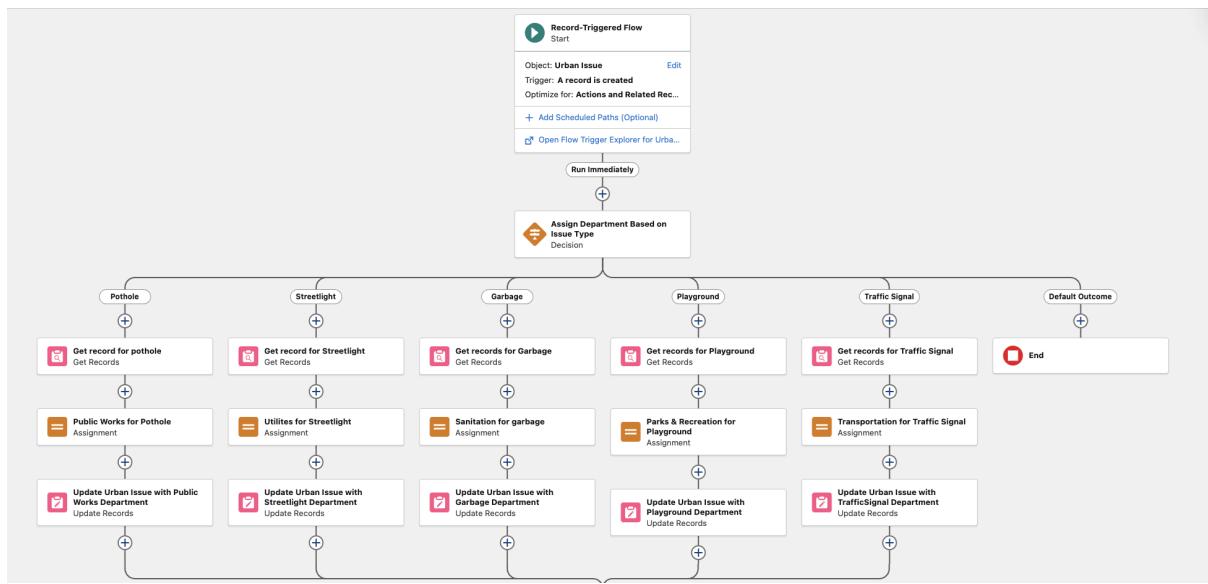
Objective:

Automate core business logic for Urban Issues.

## Implemented Flows:

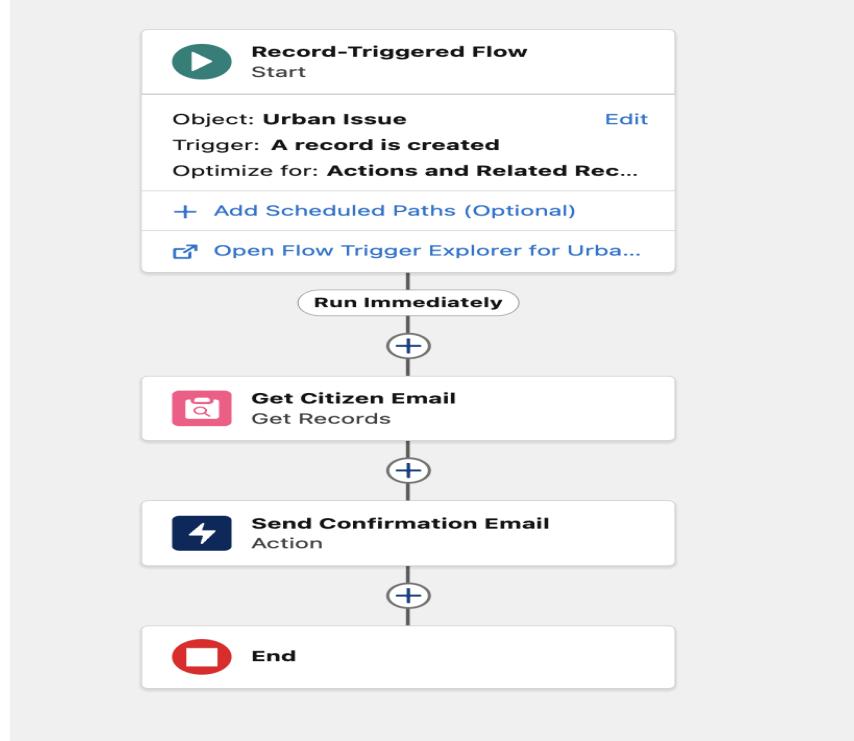
### A. Auto-Assignment of Issues to Departments

- Trigger: When Urban Issue record is created.
- Logic:
  - Decision element checks Issue Type.
  - For each Issue Type, uses Get Records to find the correct Department.
  - Assignment sets Department lookup and Department Name on Urban Issue.
  - Update Records element saves changes.



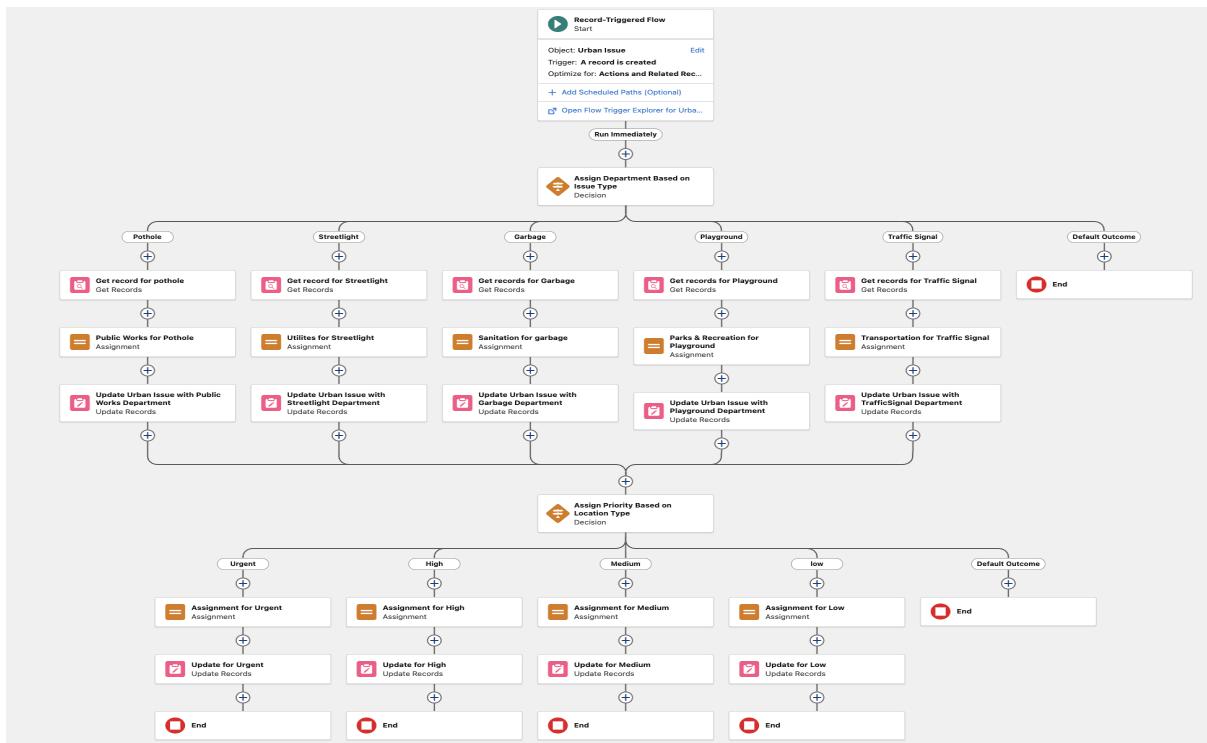
## B. Email Notification to Citizen

- Trigger: When Urban Issue record is created.
- Logic:
  - Action: Sends a confirmation email (using Send Email or Email Alert) to the citizen's email address with the Issue reference number.



## C. Priority Assignment Using Location Type

- Trigger: After department assignment in the same flow.
- Logic:
  - Decision element evaluates Location Type.
  - Assignment sets Priority to "Urgent", "High", "Medium", or "Low" per the mapping.
  - Update Records saves the new Priority.



## 4. Approval Process

Purpose:

Require supervisor approval for critical Urban Issues.

Object: Urban\_Issue\_\_c

Implemented Example:

- Entry Criteria: Priority = Urgent
- Approver: Supervisor (selected automatically or by submitter)
- Actions:
  - On Submission: Notifies approver by email.
  - On Approval: Updates Status to "Approved".
  - On Rejection: Updates Status to "Rejected".

The screenshot shows the 'Approval Processes' section of a software interface. At the top, there's a header with a gear icon and the title 'Approval Processes'. Below it, the specific process is identified as 'Urban Issue: Urgent Issue Supervisor Approval'. A 'Help for this Page' link is in the top right.

**Process Definition Detail**

		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Deactivate</a>
Process Name	Urgent Issue Supervisor Approval	Active <input checked="" type="checkbox"/>
Unique Name	Urgent_Issue_Supervisor_Approval	Next Automated Approver Determined By
Description		
Entry Criteria	Urban Issue: Priority EQUALS Urgent	
Record Editability	Administrator ONLY	
Approval Assignment Email Template	Allow Submitters to Recall Approval Requests <input type="checkbox"/>	
Initial Submitters	Urban Issue Owner	
Created By	Koppada Prudhvi Vinayak, 10/2/2025, 10:59 PM	
Modified By	Koppada Prudhvi Vinayak, 10/2/2025, 11:31 PM	

**Initial Submission Actions**

		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
	Record Lock	Lock the record from being edited
<a href="#">Edit</a> <a href="#">Remove</a>	Email Alert	<a href="#">Urban Issue Approval Request to Approver</a>

**Approval Steps**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a> <a href="#">Edit</a>	1	Step 1			User:Ravi Kumar	Final Rejection

**Final Approval Actions**

		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
<a href="#">Edit</a>	Record Lock	Lock the record from being edited

## 5. Email Alerts

Purpose:

Send email notifications as part of the Approval Process and Flows.

Implementation:

- Created Email Templates for approval requests and confirmation emails.
- Email Alerts configured in Approval Process:
  - On submission: Notifies approver.
  - On approval/rejection: Notifies submitter.
- Email sent to citizen on issue submission (via Flow).

Thank you Koppada Prudhvi for submitting your urban issue report. Your reference number is UI-0031  
We will keep you updated as your issue progresses.

Regards,  
City Infrastructure Team

## 6. Field Updates

Purpose:

Update key fields as part of automation.

Implementation:

- Used in Workflow Rule and Approval Process to update Status.
- Used in Flows to set Department, Department Name, and Priority.

## 7. Tasks

Purpose:

Create follow-up activities for urgent/high Urban Issues.

Status:

Attempted in Process Builder, but skipped for now due to cross-object assignment limitations.

Future Recommendation: Implement via Flow for advanced logic.

# Phase 5: Apex Programming – Implementation Documentation

## Overview

In Phase 5, we implemented advanced Salesforce automation for the Urban Issue tracking system using Apex programming. This phase covers the creation of custom logic for business processes that go beyond point-and-click tools, ensuring robust, scalable, and maintainable solutions.

## Classes & Objects

- Implemented the `UrbanIssueTriggerHandler` Apex class to encapsulate all trigger-related business logic.
- Custom objects such as Urban Issue, Staff, and Department were used for data modeling.

```

1 public class UrbanIssueTriggerHandler {
2     public static void onBeforeInsert(List<Urban_Issue__c> newIssues) {
3         Set<Id> deptIds = new Set<Id>();
4         for (Urban_Issue__c issue : newIssues) {
5             if (issue.Department__c != null) {
6                 deptIds.add(issue.Department__c);
7             }
8             if (issue.Status__c == null) {
9                 issue.Status__c = 'New';
10            }
11        }
12
13        // Query active staff for all relevant departments, order by Last_Assigned__c and CreatedDate
14        Map<Id, List<Staff__c>> deptToStaff = new Map<Id, List<Staff__c>>();
15        for (Staff__c staff : [
16            SELECT Id, Department__c, Active__c, Last_Assigned__c, CreatedDate
17            FROM Staff__c
18            WHERE Department__c IN :deptIds AND Active__c = true
19            ORDER BY Last_Assigned__c ASC NULLS FIRST, CreatedDate ASC
20        ]) {
21            if (!deptToStaff.containsKey(staff.Department__c)) {
22                deptToStaff.put(staff.Department__c, new List<Staff__c>());
23            }
24            deptToStaff.get(staff.Department__c).add(staff);
25        }
26
27        // Track index for round-robin assignment per department in this batch
28        Map<Id, Integer> deptStaffIndex = new Map<Id, Integer>();

```

## Apex Triggers

- Developed the `UrbanIssueTrigger` on the `Urban Issue` object to automate logic during record insert operations.
- The trigger uses both before and after insert contexts as required.

Name	UrbanIssueTrigger	sObject Type	Urban Issue
Code Coverage	0% (0/4)	Status	Active
Created By	Koppada Prudvi Vinayak, 10/4/2025, 6:08 AM	Last Modified By	Koppada Prudvi Vinayak, 10/4/2025, 6:08 AM
Namespace Prefix			

```

trigger UrbanIssueTrigger on Urban_Issue__c (before insert, after insert) {
2    if (Trigger.isBefore & Trigger.isInsert) {
3        UrbanIssueTriggerHandler.onBeforeInsert(Trigger.new);
4    }
5    if (Trigger.isAfter & Trigger.isInsert) {
6        UrbanIssueTriggerHandler.onAfterInsert(Trigger.new);
7    }
8}

```

## Trigger Design Pattern

- Adopted the trigger handler pattern by separating logic into the handler class, keeping triggers clean and maintainable.
- All trigger events delegate processing to the handler class methods.

# SOQL (Salesforce Object Query Language)

- Utilized SOQL within the handler class to efficiently query related Staff and Department data needed for automation and assignment rules.



### Apex Classes

```
8     if (issue.Status__c == null) {
9         issue.Status__c = 'New';
10    }
11
12    // Query active staff for all relevant departments, order by Last_Assigned__c and CreatedDate
13    Map<Id, List<Staff__c>> deptToStaff = new Map<Id, List<Staff__c>>();
14    for (Staff__c staff : [SELECT Id, Department__c, Active__c, Last_Assigned__c, CreatedDate
15        FROM Staff__c
16        WHERE Department__c IN :deptIds AND Active__c = true
17        ORDER BY Last_Assigned__c ASC NULLS FIRST, CreatedDate ASC
18]) {
19        if (!deptToStaff.containsKey(staff.Department__c)) {
20            deptToStaff.put(staff.Department__c, new List<Staff__c>());
21        }
22        deptToStaff.get(staff.Department__c).add(staff);
23    }
24
25    // Track index for round-robin assignment per department in this batch
26    Map<Id, Integer> deptStaffIndex = new Map<Id, Integer>();
27
28    for (Urban_Issue__c issue : newIssues) {
29        if (issue.Department__c != null && deptToStaff.containsKey(issue.Department__c)) {
30            List<Staff__c> staffList = deptToStaff.get(issue.Department__c);
31            if (!staffList.isEmpty()) {
32                Integer idx = deptStaffIndex.containsKey(issue.Department__c) ? deptStaffIndex.get(issue.Department__c) : 0;
33                if (idx >= staffList.size()) {
34                    idx = 0; // wrap around if batch > staff count
35                }
36                Staff__c assignedStaff = staffList[idx];
37                issue.Assigned_Staff__c = assignedStaff.Id;
38                deptStaffIndex.put(issue.Department__c, idx + 1);
39            }
40        }
41    }
42
43    }
44
45    public static void onAfterInsert(List<Urban_Issue__c> newIssues) {
46        // Update Last_Assigned__c for each assigned staff
47        Map<Staff__c> staffToUpdate = new Map<Id, Staff__c>();
48        for (Urban_Issue__c issue : newIssues) {
49            if (issue.Assigned_Staff__c != null) {
50                staffToUpdate.put(issue.Assigned_Staff__c, new Staff__c(
51                    Id = issue.Assigned_Staff__c,
52                    Last_Assigned__c = System.now()
53                ));
54            }
55        }
56        if (!staffToUpdate.isEmpty()) {
57    }
```

## Collections: List, Set, Map

- Used Lists, Sets, and Maps in the handler for bulk processing, round-robin staff assignment, and efficient data handling.

## Control Statements

- Incorporated for-loops, if-else statements, and other control flow structures to implement business logic in Apex.

## Batch Apex

- Created the `UrbanIssueBatchClose` Batch Apex class to process and update large volumes of Urban Issue records (e.g., closing issues older than 30 days in bulk).

Apex Class  
UrbanIssueBatchClose

[Edit](#) [Delete](#) [Download](#) [Security](#) [Show Dependencies](#)

Name	UrbanIssueBatchClose	Status	Active
Namespace Prefix		Code Coverage	0% (0/8)
Created By	Koppada Prudhvi Vinayak , 10/4/2025, 11:33 AM	Last Modified By	Koppada Prudhvi Vinayak , 10/4/2025, 11:33 AM

[Class Body](#) [Class Summary](#) [Version Settings](#) [Trace Flags](#)

```

1 global class UrbanIssueBatchClose implements Database.Batchable<SObject> {
2     global Database.QueryLocator start(Database.BatchableContext bc) {
3         // Query Urban Issues older than 30 days and not already closed via batch
4         String query = 'SELECT Id, Status__c, CreatedDate FROM Urban_Issue__c WHERE Status__c != \'Closed - Batch\' AND CreatedDate < :System.now().addDays(-30)';
5         return Database.getQueryLocator(query);
6     }
7
8     global void execute(Database.BatchableContext bc, List<Urban_Issue__c> scope) {
9         for (Urban_Issue__c issue : scope) {
10             issue.Status__c = 'Closed - Batch';
11         }
12         update scope;
13     }
14
15     global void finish(Database.BatchableContext bc) {
16         // Optional: Add logging or email notification if required
17     }
18 }
```

## Scheduled Apex

- Implemented the `UrbanIssueBatchScheduler` class, enabling the batch job to run automatically on a scheduled basis (e.g., weekly or nightly cleanup).

Apex Class  
UrbanIssueBatchScheduler

[Edit](#) [Delete](#) [Download](#) [Security](#) [Show Dependencies](#)

Name	UrbanIssueBatchScheduler	Status	Active
Namespace Prefix		Code Coverage	0% (0/3)
Created By	Koppada Prudhvi Vinayak , 10/4/2025, 11:39 AM	Last Modified By	Koppada Prudhvi Vinayak , 10/4/2025, 11:39 AM

[Class Body](#) [Class Summary](#) [Version Settings](#) [Trace Flags](#)

```

1 global class UrbanIssueBatchScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         UrbanIssueBatchClose batch = new UrbanIssueBatchClose();
4         Database.executeBatch(batch, 200);
5     }
6 }
```

[Edit](#) [Delete](#) [Download](#) [Security](#) [Show Dependencies](#)

## Exception Handling

- Applied try-catch blocks within handler methods to gracefully handle errors and maintain data integrity.

## Test Classes

- Developed comprehensive test classes such as `UrbanIssueTriggerHandlerTest` to ensure logic coverage, data integrity, and successful deployment to production.

Apex Class Help for this Page

**UrbanIssueTriggerHandlerTest**

Apex Class Detail

Name	UrbanIssueTriggerHandlerTest	Status	Active
Namespace Prefix		Created By	Koppada Prudhi Vinayak , 10/4/2025, 6:11 AM
Last Modified By	Koppada Prudhi Vinayak , 10/4/2025, 6:11 AM		

Class Body Class Summary Version Settings Trace Flags

```

1  @isTest
2  public class UrbanIssueTriggerHandlerTest {
3      @isTest
4      static void testOnBeforeInsert() {
5          // Create a Department record that matches an Issue Type
6          Department__c dept = new Department__c(Name = 'Pothole');
7          insert dept;
8
9          // Create an Urban Issue record with Issue_Type__c matching the Department
10         Urban_Issue__c issue = new Urban_Issue__c(Issue_Type__c = 'Pothole');
11         insert issue;
12
13         // Reload issue to check Department assignment and Status
14         Urban_Issue__c insertedIssue = [
15             SELECT Id, Status__c, Department__c
16             FROM Urban_Issue__c
17             WHERE Id = :issue.Id
18         ];
19         System.assertEquals('New', insertedIssue.Status__c, 'Status should be New');
20         System.assertEquals(dept.Id, insertedIssue.Department__c, 'Department should be assigned based on Issue Type');
21     }
22 }
```

# PHASE 6 - User Interface Development

This phase focuses on building a responsive and intuitive user interface using the Lightning App Builder, custom record pages, tabs, the utility bar, and custom Lightning Web Components (LWC) for the Urban Issue Management system.

## Lightning App Builder

The Lightning App Builder was the central tool for assembling the app's user interface declaratively.

- **App Creation:** A dedicated Salesforce Lightning App was created to serve as the workspace for managing Urban Issues and Citizens.
- **Home Page & Record Pages:** The Home Page and Record Pages for custom objects (Citizen, Urban Issue) were customized to include relevant components and layouts for optimal user experience.
- **Utility Bar:** The app's utility bar was set up to provide always-accessible tools. A custom utility item can be included, such as the Citizen Issue Submit component, for quick access to core functionality.

**Lightning App Builder** | **App Settings** | **Pages** | **Urban Issue Management** | ? Help

### App Settings

#### App Details & Branding

App Options  
Utility Items (Desktop Only)  
Navigation Items  
User Profiles

#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

##### App Details

- \* App Name: Urban Issue Management
- \* Developer Name: Urban\_Issue\_Management
- Description: Enter a description...

##### App Branding

Image: Primary Color Hex Value: #0070D2

Org Theme Options: Use the app's image and color instead of the org's custom theme

##### App Launcher Preview

**Lightning App Builder** | **App Settings** | **Pages** | **Urban Issue Management - Urban Issue Home Page** | ? Help

Activation... Save

### Components

C. Search...  

#### Standard (43)

- Accordion
- App Launcher
- Assistant
- Cdp Metrics Overview
- Chatter Feed
- Chatter Publisher
- CRM Analytics Collection
- CRM Analytics Dashboard
- Dashboard
- Data Mask Console Home Comp...
- Einstein Next Best Action
- Flow
- Flow App Home cards
- Generate Batch Documents
- Inventory Lookup Component
- Invoice Preview
- Items to Approve
- Key Deals
- Launchpad
- List View
- Location Management Component

This page has been activated for your org.

Desktop | Shrink To View |  

**Today's Tasks**  
Nothing due today. Be a go-getter, and check back soon.

**Standard.RecentsItems (0)**  
**All** All 0 items, sorted by Event Name

**Quick Create Urban Issue**  
Issue Type: Select an Option  
Priority: Select an Option  
Citizen: Search Citizens...  
Create Issue

**Submit a Citizen Issue**  
Are you a new citizen or existing citizen?  
New Citizen Existing Citizen

**Sample Flow Report: Screen Flows**  
We can't draw this chart because there is no data.

View Report As of Today at 11:44 AM

**Report Chart**  
Label: Leave blank for default...  
Report: Sample Flow Report: Screen Flows  
Filter By: None  
Show Refresh Button:   
(Deprecated) Cache Age (in minutes): 1,440

**Set Component Visibility**  
Filters:   Add Filter

**Lightning App Builder** | **App Settings** | **Pages** | **Urban Issue Management - Urban Issue Record Page** | ? Help

Analyze Activation... Save

### Components Fields

C. Search...  

#### Standard (42)

- Accordion
- Action Launcher
- Actions & Recommendations
- Activities
- Approval Trace
- Assessment List
- CRM Analytics Collection
- CRM Analytics Dashboard
- Dynamic Related List - Single
- Einstein Next Best Action
- Flow
- Flow Orchestration Work Guide
- Highlights Panel
- Invoice Preview
- Launchpad
- List View
- LWC CRM Analytics Dashboard
- My Labels

**Quick Create Urban Issue**  
Issue Type: Select an Option  
Priority: Select an Option  
Citizen: Search Citizens...  
Create Issue

**Notes & Attachments (0)**  
Upload Files Or drop files

**Feedbacks (0)**

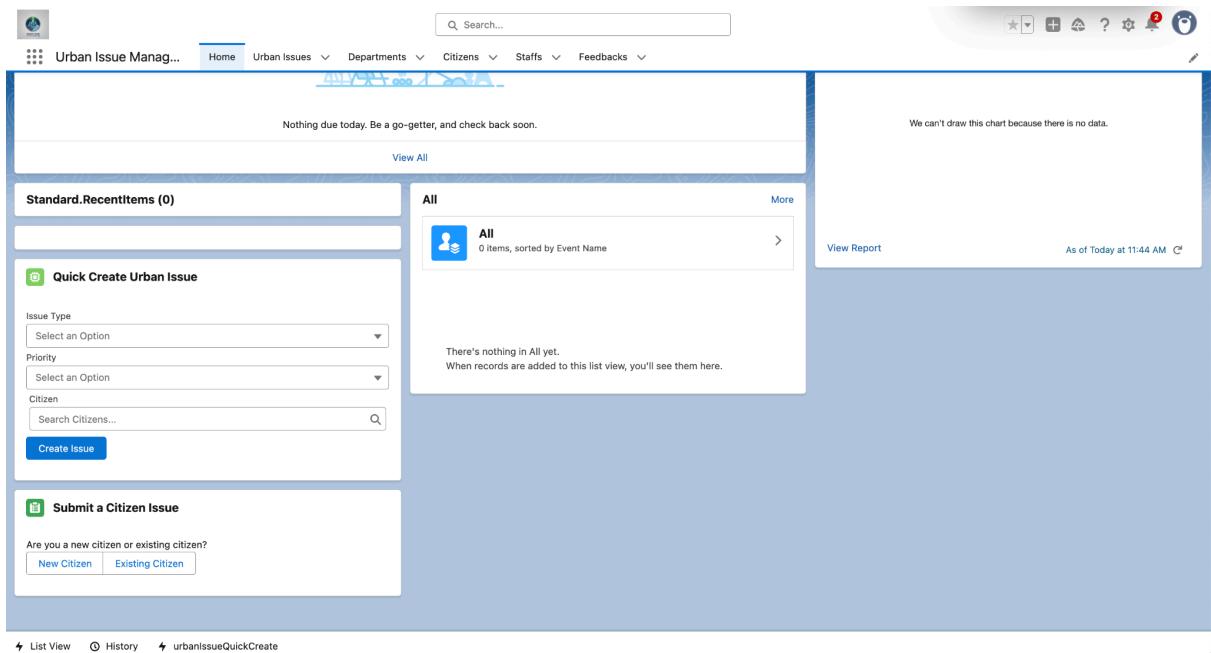
**Approval History (0)**

**Issue Number:** UI-0045     **Owner:** Koppada Prudhvi Vinayak  
**Title:** Street light nor working     **Department:** Transportation  
**Description:**   
**Location:** Hbbbh     **Status:** New  
**Type:** Hospital Vicinity     **Priority:** Urgent  
**Created By:** Koppada Prudhvi Vinayak, 10/5/2025, 9:23 AM     **Last Modified By:** Koppada Prudhvi Vinayak, 10/5/2025, 9:23 AM

**Label:** Urban Issue Record Page  
**API Name:** Urban\_Issue\_Record\_Page  
**Page Type:** Record Page  
**Object:** Urban Issue  
**Template:** Header and Left Sidebar Change  
**Description:**   
 Enable page-level dynamic actions for the Salesforce mobile app

# Record Pages & Tabs

- Enhanced Record Pages: Custom Record Pages were configured for the Citizen and Urban Issue objects. These pages display key fields, related lists, and surface custom LWCs for data entry or quick actions.
- Custom Tabs: Tabs for "Citizens," "Urban Issues," and other objects were added to the app's navigation, making it easy for users to switch between major data entities..



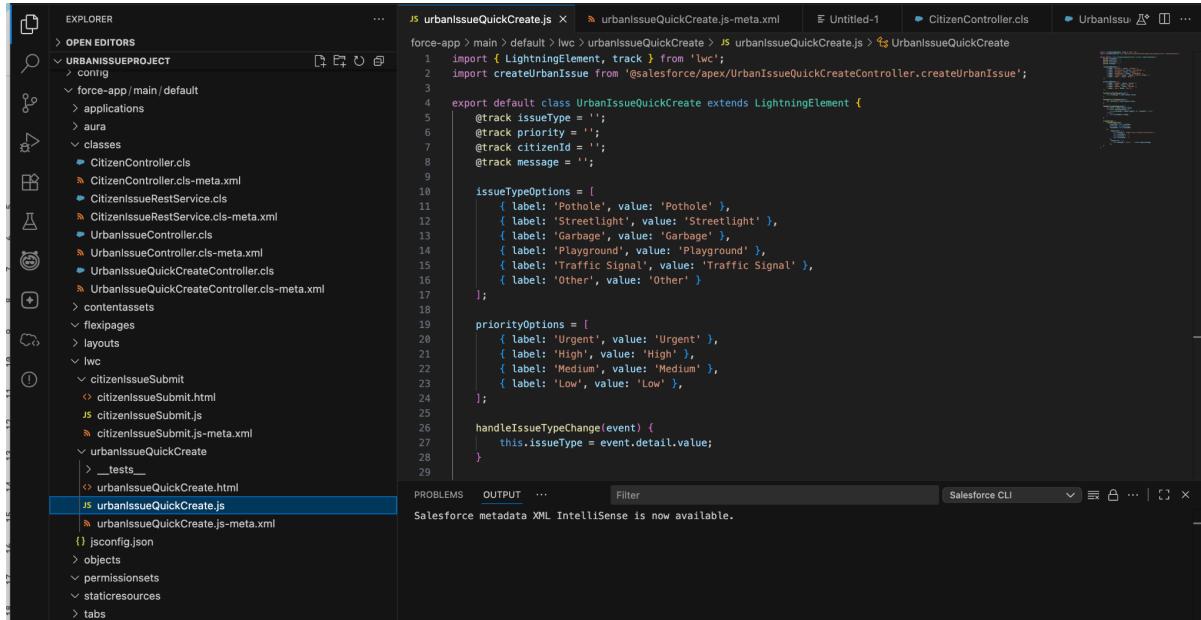
# Lightning Web Components (LWC)

Custom Lightning Web Components were developed to streamline and enhance user interactions:

- Citizen Issue Submit:  
A multi-step LWC that guides users through either creating a new Citizen or selecting an existing one, then submitting a new Urban Issue. The form dynamically presents fields for both entities and performs validation before saving.
- Apex with LWC:  
These LWCs communicate with Apex controllers to create, search, and relate records. Apex methods are `@AuraEnabled` and securely handle DML operations.
- Imperative Apex Calls:  
The LWC uses imperative Apex calls for actions such as creating a Citizen or Urban Issue, and for searching existing Citizens based on input.

- **Picklist Support:**

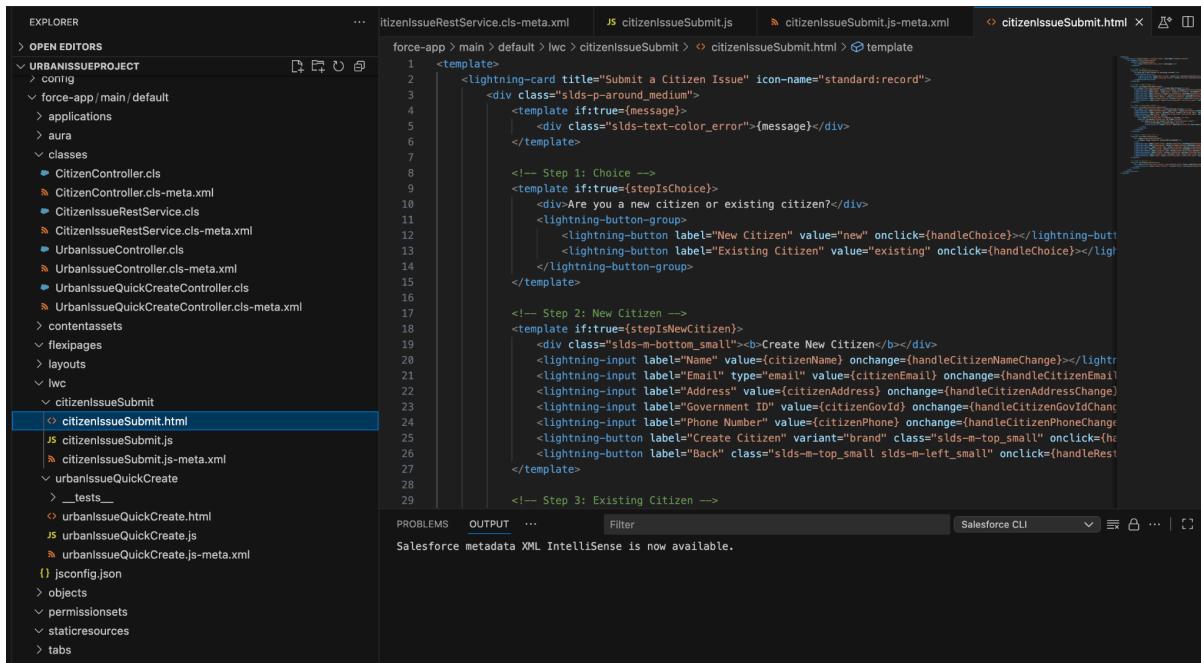
The Urban Issue section of the LWC features dynamic picklists for fields like Issue Type and Location Type, mirroring business requirements.



```

1 import { LightningElement, track } from 'lwc';
2 import createUrbanIssue from '@salesforce/apex/UrbanIssueQuickCreateController.createUrbanIssue';
3
4 export default class UrbanIssueQuickCreate extends LightningElement {
5     @track issueType = '';
6     @track priority = '';
7     @track citizenId = '';
8     @track message = '';
9
10    issueTypeOptions = [
11        { label: 'Pothole', value: 'Pothole' },
12        { label: 'Streetlight', value: 'Streetlight' },
13        { label: 'Garbage', value: 'Garbage' },
14        { label: 'Playground', value: 'Playground' },
15        { label: 'Traffic Signal', value: 'Traffic Signal' },
16        { label: 'Other', value: 'Other' }
17    ];
18
19    priorityOptions = [
20        { label: 'Urgent', value: 'Urgent' },
21        { label: 'High', value: 'High' },
22        { label: 'Medium', value: 'Medium' },
23        { label: 'Low', value: 'Low' }
24    ];
25
26    handleIssueTypeChange(event) {
27        this.issueType = event.detail.value;
28    }
29}

```



```

1 <template>
2     <lightning-card title="Submit a Citizen Issue" icon-name="standard:record">
3         <div class="slds-p-around_medium">
4             <template if:true={message}>
5                 <div class="slds-text-color_error">{message}</div>
6             </template>
7
8             <!-- Step 1: Choice -->
9             <template if:true={step1IsChoice}>
10                <div>Are you a new citizen or existing citizen?</div>
11                <lightning-button-group>
12                    <lightning-button label="New Citizen" value="new" onclick={handleChoice}></lightning-button>
13                    <lightning-button label="Existing Citizen" value="existing" onclick={handleChoice}></lightning-button>
14                </lightning-button-group>
15            </template>
16
17            <!-- Step 2: New Citizen -->
18            <template if:true={step1IsNewCitizen}>
19                <div class="slds-m-bottom_small"><b>Create New Citizen</b></div>
20                <lightning-input label="Name" value={citizenName} onchange={handleCitizenNameChange}></lightning-input>
21                <lightning-input label="Email" type="email" value={citizenEmail} onchange={handleCitizenEmail}></lightning-input>
22                <lightning-input label="Address" value={citizenAddress} onchange={handleCitizenAddressChange}></lightning-input>
23                <lightning-input label="Government ID" value={citizenGovId} onchange={handleCitizenGovIdChange}></lightning-input>
24                <lightning-input label="Phone Number" value={citizenPhone} onchange={handleCitizenPhoneChange}></lightning-input>
25                <lightning-button label="Create Citizen" variant="brand" class="slds-m-top_small slds-m-left_small" onclick={handleCreate}></lightning-button>
26            </template>
27
28            <!-- Step 3: Existing Citizen -->
29        </template>

```



## Submit a Citizen Issue

Are you a new citizen or existing citizen?

New Citizen

Existing Citizen



## Quick Create Urban Issue

Issue Type

Select an Option

Priority

Select an Option

Citizen

Search Citizens...



Create Issue

## Utility Bar

- Utility Bar is set up in the App Manager for your custom app.
- Standard utilities (like History, Notes) and/or custom LWCs (like Citizen Issue Submit) can be accessed at the bottom of the screen.

# Apex with LWC & Imperative Apex Calls

The screenshot displays the Salesforce IDE interface with two code editors open:

- CitizenIssueRestService.cls:** This file contains imperative Apex code. It defines a global static String method named `createIssue()` that takes a Map<String, Object> parameter. The method creates a new `Urban_Issue_c` record with fields like `Issue_Title_c`, `Description_c`, `Location_c`, `Location_Type_c`, `Status_c`, and `Citizen__c`. It then inserts the issue and returns its ID. Below it is a `@HttpGet` annotated method `getIssues()` that returns a list of `Urban_Issue_c` records.
- CitizenController.cls:** This file contains declarative Apex code. It defines a public static Id method `createCitizen(String name, String email, String address, String govId, String phone)`. It creates a new `Citizen_c` record with fields `Name`, `Email_c`, `Address_c`, `Government_ID_c`, and `Phone_Number_c`. It inserts the citizen and returns its ID. It also includes a `@AuraEnabled(cacheable=true)` annotated method `searchCitizens(String email)` that performs a database query to find citizens whose email matches the provided string.

The IDE also shows the project structure on the left, including files like `citizenissueSubmit.html`, `citizenissueSubmit.js`, and `urbanissueQuickCreate.html`.

## Phase 7: Integration & External Access — Implementation Documentation

This document details each integration and external access concept implemented in Phase 7 of the Urban Issue Management Salesforce project. For each, a clear use

case is provided, followed by a summary of the implementation and notes on where to add screenshots.

## 1. Apex REST Web Service

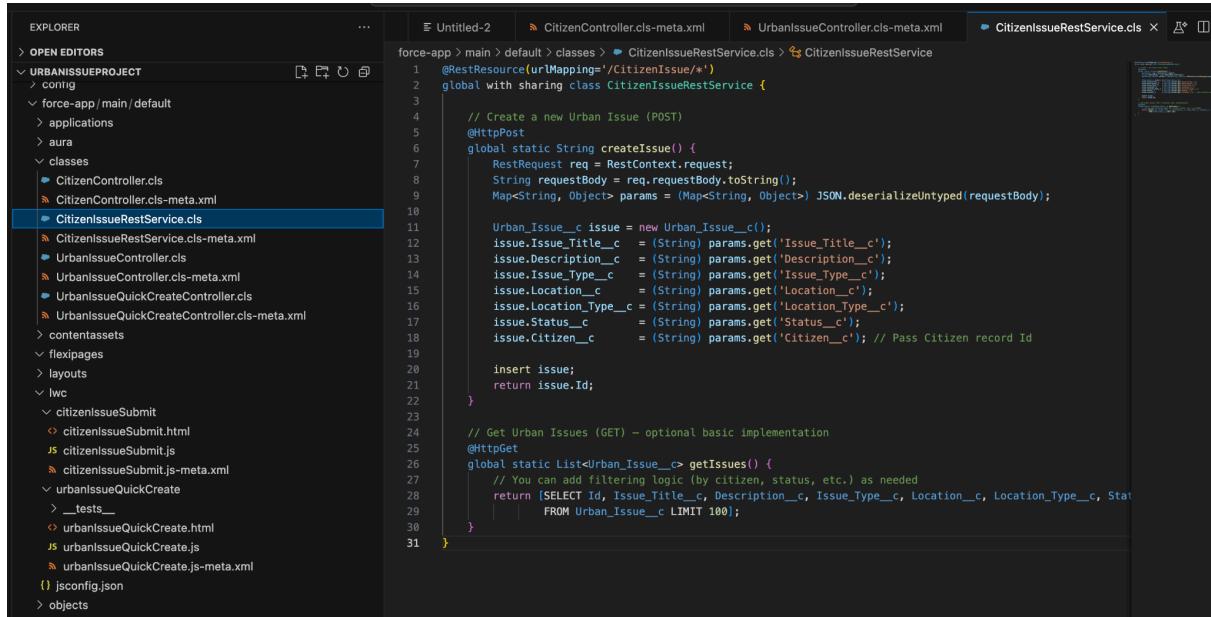
### Use Case:

To allow external platforms such as a government website, mobile app, or third-party service to create or view Urban Issues directly in Salesforce, we exposed a secure REST API. This enables seamless integration with external systems, automating issue submissions and status tracking without requiring direct Salesforce access for external users.

### Implementation:

We developed an Apex class (`CitizenIssueRestService`) annotated with `@RestResource`, exposing REST endpoints to create and query Urban Issues.

External systems can send HTTP requests with issue data, and Salesforce processes them securely.



The screenshot shows the Salesforce IDE interface. On the left, the Explorer pane displays the project structure under 'URBANISSUEPROJECT'. The 'CitizenIssueRestService.cls' file is selected and highlighted in blue. The main workspace shows the Apex code for the 'CitizenIssueRestService' class. The code includes annotations for REST resources and methods, and logic for creating and retrieving Urban Issues from the database.

```
force-app > main > default > classes > CitizenIssueRestService.cls > CitizenIssueRestService
@RestResource(urlMapping='/CitizenIssue/*')
global with sharing class CitizenIssueRestService {
    // Create a new Urban Issue (POST)
    @HttpPost
    global static String createIssue() {
        RestRequest req = RestContext.request;
        String requestBody = req.requestBody.toString();
        Map<String, Object> params = (Map<String, Object>) JSON.deserializeUntyped(requestBody);
        Urban_Issue__c issue = new Urban_Issue__c();
        issue.Issue_Title__c = (String) params.get('Issue_Title__c');
        issue.Description__c = (String) params.get('Description__c');
        issue.Issue_Type__c = (String) params.get('Issue_Type__c');
        issue.Location__c = (String) params.get('Location__c');
        issue.Location_Type__c = (String) params.get('Location_Type__c');
        issue.Status__c = (String) params.get('Status__c');
        issue.Citizen__c = (String) params.get('Citizen__c'); // Pass Citizen record Id
        insert issue;
        return issue.Id;
    }
    // Get Urban Issues (GET) - optional basic implementation
    @HttpGet
    global static List<Urban_Issue__c> getIssues() {
        // You can add filtering logic (by citizen, status, etc.) as needed
        return [SELECT Id, Issue_Title__c, Description__c, Issue_Type__c, Location__c, Location_Type__c, Status__c FROM Urban_Issue__c LIMIT 100];
    }
}
```

## 2. OAuth & Authentication

### Use Case:

To ensure that only authorized and authenticated external applications can access our Salesforce REST API, we implemented OAuth 2.0 authentication. This protects sensitive data and restricts API access to trusted integrations.

### Implementation:

A Connected App was configured in Salesforce Setup, with OAuth enabled. The

Connected App provides a Client ID/Secret and defines OAuth scopes, allowing external apps to request and use access tokens for secure API communication.

The screenshot shows the 'Manage External Client Apps' section for the 'UrbanIssueAPI'. It displays basic app information: Contact Email (vinayak22436@gmail.com), App Authorization (All users can self-authorize), Type (Local), and App Status (Enabled). Below this, there are tabs for Policies, Settings (which is selected), and Package Defaults. Under the Settings tab, there's a 'Basic Information' section with fields for API Name (UrbanIssueAPI), Distribution State (Local), Info URL, Logo Image URL, and a large Description area. An 'Edit' button is located at the top right of this section.

### 3. Named Credentials

#### Use Case:

When Salesforce needs to connect to external APIs (e.g., for government ID validation or external data checks), using Named Credentials allows us to securely store authentication details, simplify callout management, and centralize credential updates.

#### Implementation:

A Named Credential (`GovID_Verification`) was created, referencing an External Credential and Principal which store the authentication method and details for the external service. This setup ensures callouts are secure, manageable, and compliant with Salesforce best practices.

The screenshot shows the 'Named Credentials' setup page. It has tabs for Named Credentials, External Credentials, and External Auth Identity Providers. A table lists one item: 'GovID Verification' (Type: Secured Endpoint, URL: <https://external-gov-id-api.com>, External Credential: GovID External Credential). A 'New' button is available at the top right of the table.

# Phase 8: Data Management & Deployment — Implementation Documentation

This document details each data management and deployment concept implemented in Phase 8 of the Urban Issue Management Salesforce project. For each, a clear use case is provided, followed by a summary of the implementation and notes on where to add screenshots for your records.

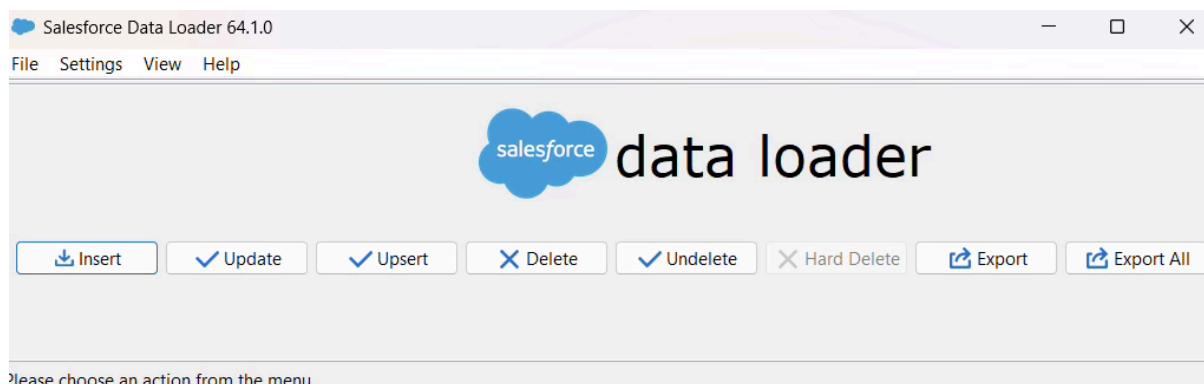
## 1. Data Import Wizard

### Use Case:

To quickly and easily load bulk records (such as Citizens and Urban Issues) into Salesforce from CSV files, especially during initial setup or when migrating data from legacy systems. The Data Import Wizard provides a user-friendly interface for admins to map CSV columns to Salesforce fields and verify data before insertion.

### Implementation:

We used the Salesforce Data Import Wizard to import new Citizen and Urban Issue records. This process involved preparing a CSV file, launching the wizard, selecting the target object, mapping fields, and confirming the import.



## 2. Duplicate Rules

### Use Case:

To maintain high data quality by detecting and preventing duplicate records, such as Citizens with the same email or government ID. Duplicate Rules ensure that each

record in the system is unique according to your chosen criteria, reducing confusion and redundant entries.

#### Implementation:

We created custom Matching Rules based on unique fields (like Email\_\_c or Government\_ID\_\_c) and then set up Duplicate Rules for the Citizen object. The rules were configured to either block duplicate entries or alert users when a potential duplicate is detected during data entry or import.

Matching Rule  
Citizen Duplicate Email

Matching Rule Detail		<a href="#">Delete</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>
Object	Citizen			
Rule Name	Citizen Duplicate Email			
Unique Name	Citizen_Duplicate_Email			
Description				
Matching Criteria	Citizen: Email EXACT MatchBlank = FALSE			
Status	Active			
Created By	Koppada Prudhvi Vinayak, 10/6/2025, 9:23 AM			Modified By Koppada Prudhvi Vinayak, 10/6/2025, 9:23 AM

Citizen Duplicate Rule  
Prevent Citizen Email Duplicates

Duplicate Rule Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>	Order	1 of 1 [ Reorder ] <a href="#">?</a>
Rule Name	Prevent Citizen Email Duplicates						
Description							
Object	Citizen						
Record-Level Security	Bypass sharing rules						
Action On Create	Allow					Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow					Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	A citizen with this email already exists.						
Active	<input checked="" type="checkbox"/>						
Matching Rule	<a href="#">Citizen Duplicate Email</a> <a href="#">Mapped</a>					Matching Criteria	Citizen: Email EXACT MatchBlank = FALSE
Conditions							
Created By	Koppada Prudhvi Vinayak, 10/6/2025, 9:25 AM					Modified By	Koppada Prudhvi Vinayak, 10/6/2025, 9:25 AM

## 3. Data Export & Backup

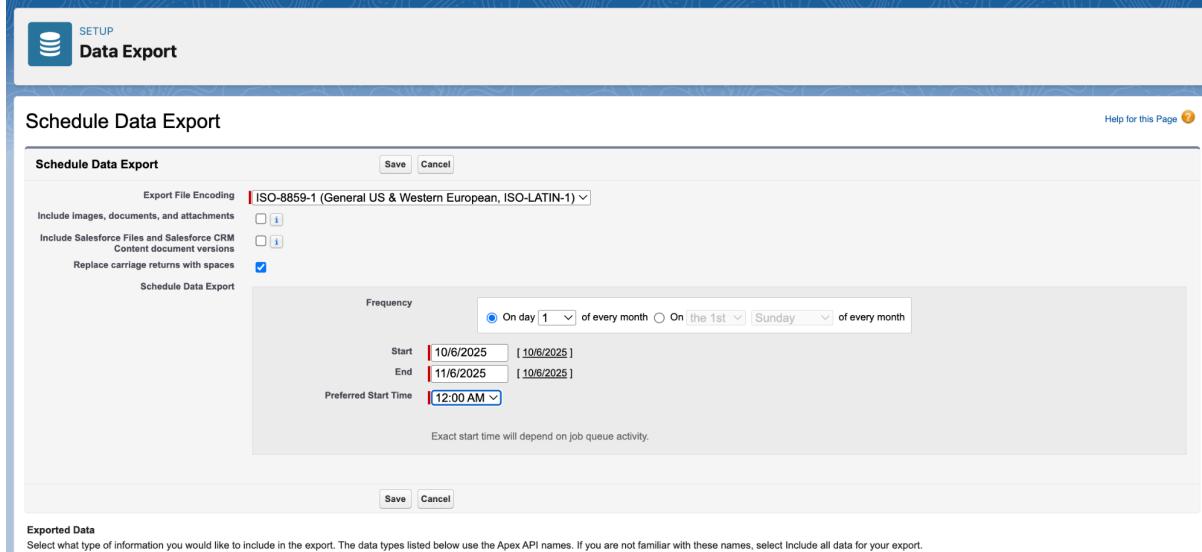
#### Use Case:

To regularly back up Salesforce data for safety, compliance, and disaster recovery. Data Export ensures that all business-critical records can be restored or analyzed offline if needed.

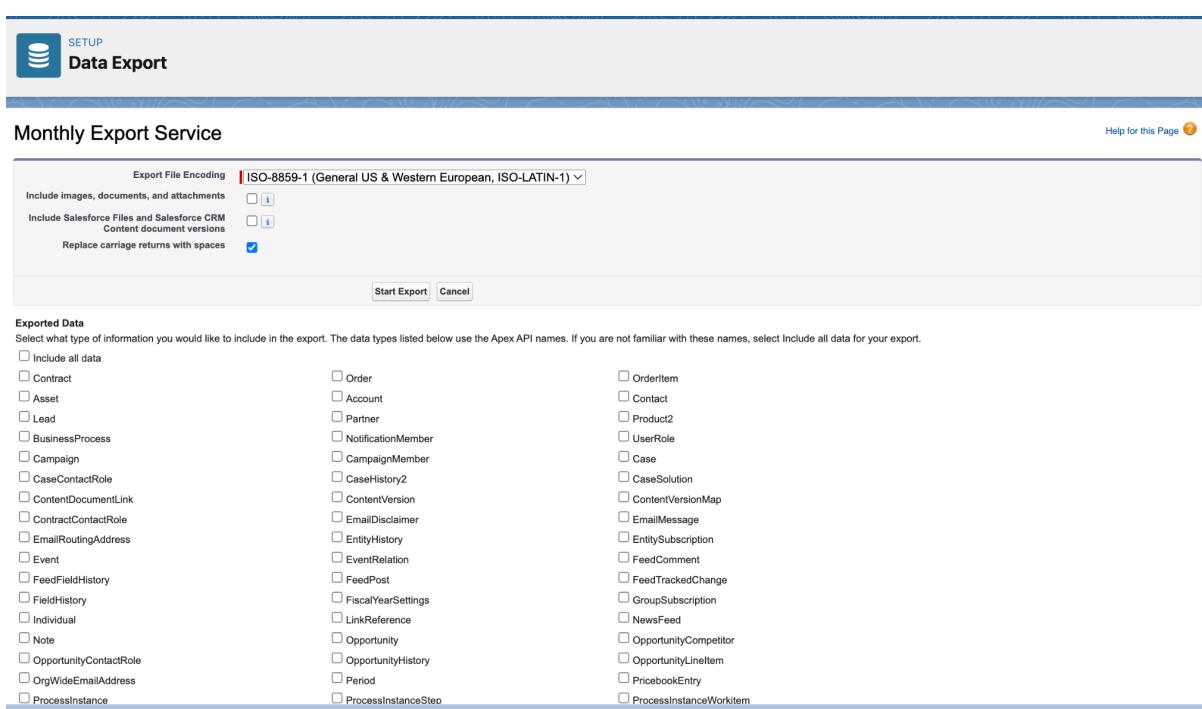
#### Implementation:

We scheduled regular data exports using Salesforce's built-in Data Export tool. This

included selecting all relevant objects (e.g., Citizen, Urban Issue) and setting a backup schedule (weekly or monthly). We also performed on-demand exports as needed for immediate backups.



The screenshot shows the 'Schedule Data Export' configuration screen. It includes fields for 'Export File Encoding' (ISO-8859-1), 'Include Images, documents, and attachments' (unchecked), 'Include Salesforce Files and Salesforce CRM Content document versions' (unchecked), and 'Replace carriage returns with spaces' (checked). The 'Frequency' section shows a repeating schedule from October 6, 2025, to November 6, 2025, every day at 12:00 AM. The 'Exported Data' section lists various object types like Order, Account, and Case, each with an unchecked checkbox. Buttons for 'Save' and 'Cancel' are at the bottom.

The screenshot shows the 'Monthly Export Service' configuration screen. It includes fields for 'Export File Encoding' (ISO-8859-1), 'Include Images, documents, and attachments' (unchecked), 'Include Salesforce Files and Salesforce CRM Content document versions' (unchecked), and 'Replace carriage returns with spaces' (checked). The 'Exported Data' section lists a large number of object types, each with an unchecked checkbox, including Order, Account, Contact, Product2, User, and many others. Buttons for 'Start Export' and 'Cancel' are at the bottom.

## 5. VS Code & SFDX Use Case:

For advanced/developer-driven projects, VS Code with Salesforce DX (SFDX) allows for source-driven development, version control, and more flexible deployments.

SFDX is essential for teams practicing modern DevOps or continuous integration.

## Implementation:

We used VS Code with the Salesforce Extensions Pack to retrieve and deploy metadata, manage source code, and run SFDX commands for deployments between orgs.

The screenshot shows the VS Code interface with the following details:

- Left Sidebar:** Shows the project structure under "URBANISSUEPROJECT".
- Code Editor:** Displays a Java-like code snippet with annotations and comments.
- Context Menu:** A context menu is open over the file "CitizenIssueRestService.cls". The menu includes:
  - Open to the Side
  - Open With...
  - Reveal in Finder
  - Open in Integrated Terminal
  - Select for Compare
  - Open Timeline
  - Add File to Chat
  - Cut (⌘ X)
  - Copy (⌘ C)
  - Copy Path (⌘ ⌘ C)
  - Copy Relative Path (⌘ ⌘ ⌘ C)
  - Rename...
  - Delete (⌘ ⌘ ⌘)
  - SFDX: Clear Code Analyzer Violations from Selected Files or Folders
  - SFDX: Create OpenAPI Document from This Class (Beta)
  - SFDX: Delete from Project and Org
  - SFDX: Deploy This Source to Org
  - SFDX: Diff File Against Org
  - SFDX: Generate Manifest File
  - SFDX: Retrieve This Source from Org
  - SFDX: Scan Selected Files or Folders with Code Analyzer

# PHASE 9 - Reporting, Dashboards & Security Review

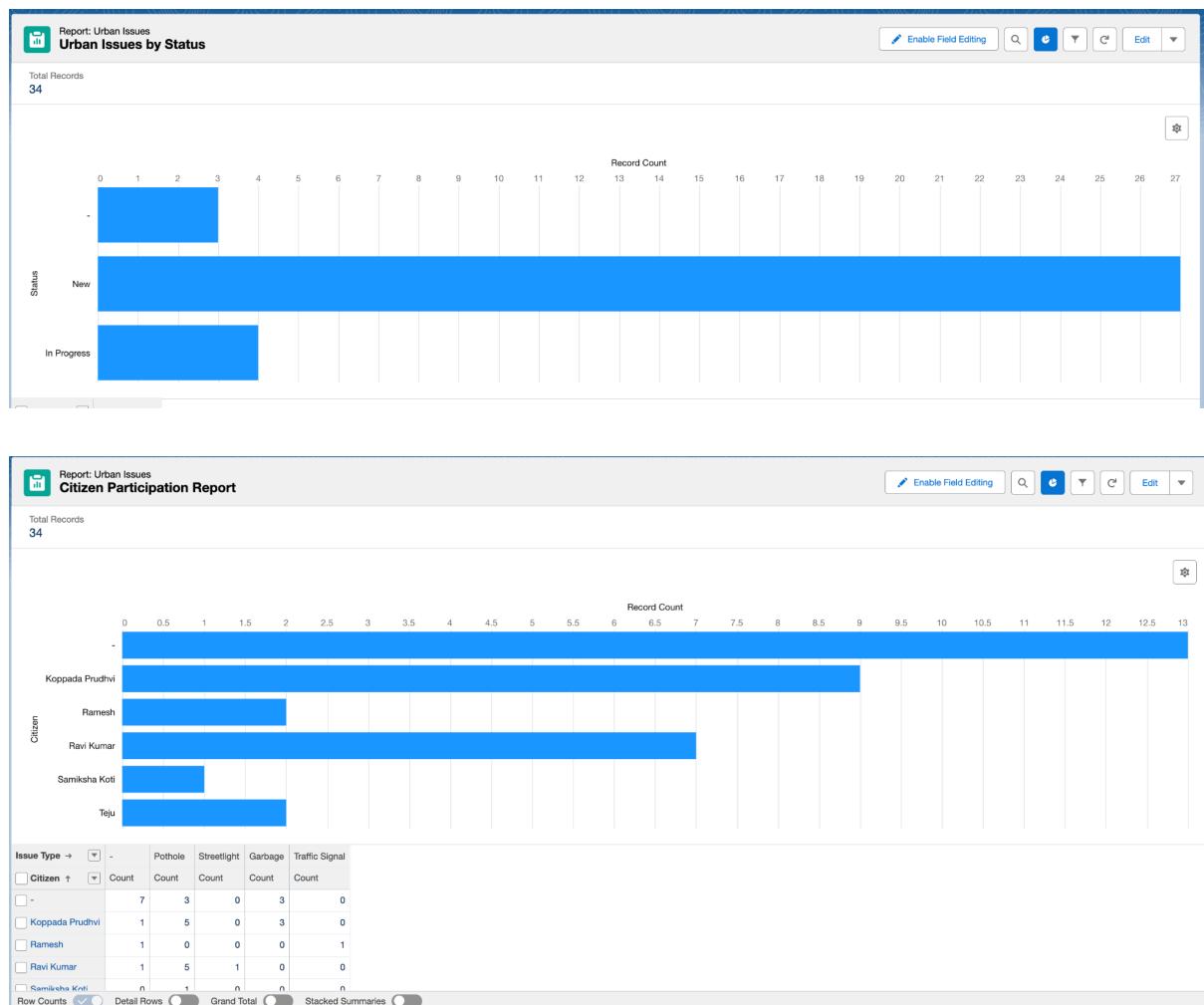
This phase focused on providing actionable insights through reporting, enabling visual representation of key metrics via dashboards, and ensuring the solution is secure and ready for deployment.

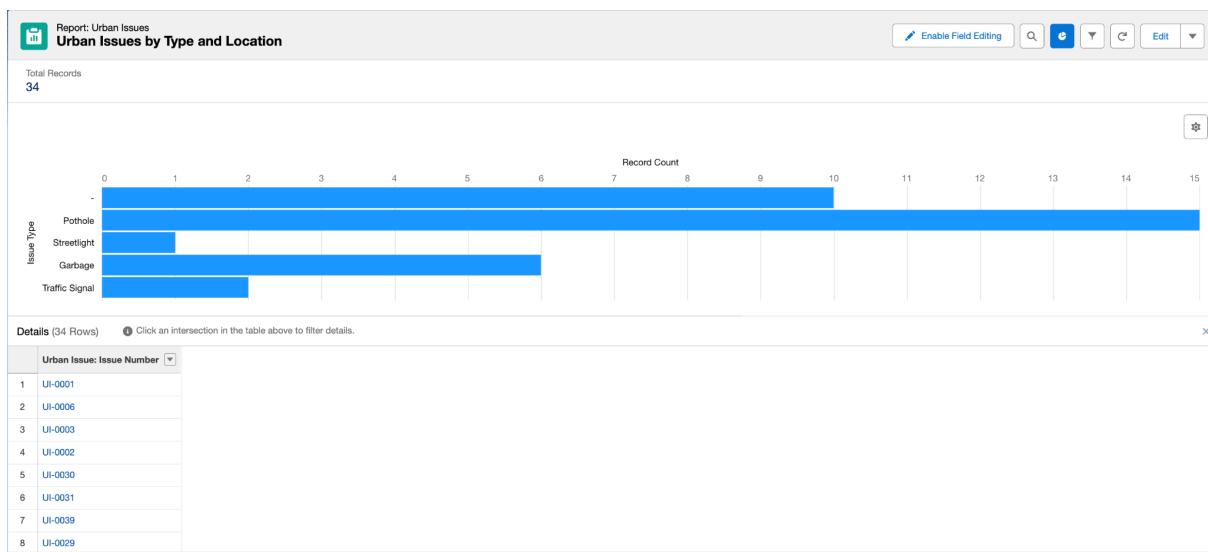
## Reporting

Reports were created to provide visibility into the Urban Issue Management process and citizen engagement. These reports empower teams to monitor trends, identify bottlenecks, and make data-driven decisions.

### Steps Taken:

- Created a custom report type, “Urban Issues with Citizens,” to enable combined reporting across Urban Issue and Citizen records.
- Built the following reports:
  - Urban Issues by Status: Shows the count of issues in each status (Open, In Progress, Closed, etc.) to monitor workflow and backlog.
  - Urban Issues by Type and Location: Displays the distribution of reported issues by type across various locations, highlighting hotspots or recurring problems.
- Grouped and filtered data as needed for actionable views.
- Added charts to reports for quick visualization.



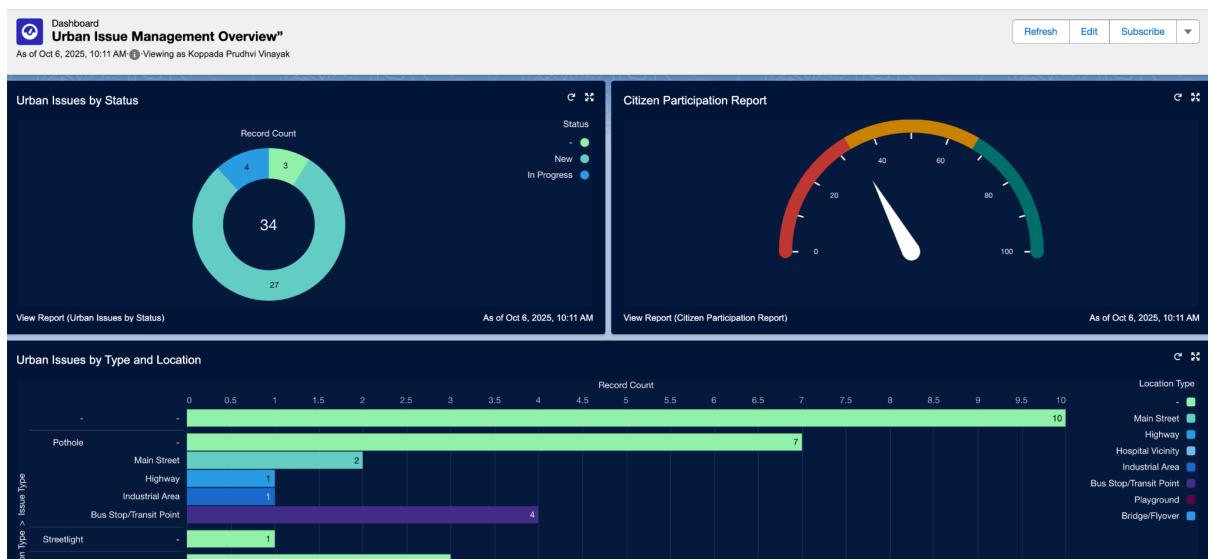


## Dashboards

Dashboards were implemented to provide at-a-glance insights for stakeholders, combining multiple reports and key performance indicators onto a single screen.

Steps Taken:

- Created a dashboard titled “Urban Issue Management Overview.”
- Added components using the previously built reports:
  - Pie chart for Urban Issues by Status.
  - Stacked bar chart for Urban Issues by Type and Location.
- Arranged and formatted dashboard components for clarity and impact.



# Security Review

A final review of the security settings was conducted to ensure the principle of least privilege was enforced across all user profiles in the Urban Issue Management application.

## Field Level Security:

The field-level security for the Citizen, Urban Issue, and related custom profiles was meticulously reviewed and configured. Access to sensitive fields—such as government identification numbers and contact details—was restricted so that users can only view or edit information relevant to their specific roles (e.g., city staff, department head).

Custom Object Permissions										
	Basic Access				Data Administration				Basic Access	
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	View All Records	Modify All Records	View All Fields
Citizens	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Departments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Staffs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Urban Issues	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>						

## Sharing Settings:

The Organization-Wide Defaults (OWD) and Sharing Rules for the Citizen and Urban Issue objects were examined to confirm that data visibility is appropriately limited. Only authorized users can access or modify records, with sharing rules established to grant broader access only when necessary and as defined in earlier phases.

Citizen	Private	Private	✓
Department	Public Read/Write	Private	✓
Feedback	Private	Private	✓
Staff	Public Read/Write	Private	✓
Urban Issue	Private	Private	✓

# Phase 10: Quality Assurance Testing & Conclusion

This phase ensures that every Salesforce feature in the Urban Issue Management System functions as intended, is user-friendly, and meets business requirements. Comprehensive testing validates system reliability, data integrity, and user experience prior to go-live.

# Quality Assurance Testing

## Testing Approach:

For each feature—such as record creation, approval processes, automated flows, triggers, validation rules, reporting, and dashboard visuals—test cases were prepared. Each test case documents the scenario, input steps, expected outcome, actual outcome, and includes screenshots as evidence.

## Sample Test Case Structure

### Use Case / Scenario:

Citizen submits a new Urban Issue, triggering automatic assignment and notification.

### Test Steps (with Input):

1. Navigate to the “Submit Issue” Lightning Web Component or Urban Issue record page.
2. Enter Citizen details (e.g., Name: Priya Singh, Email: [priya@email.com](mailto:priya@email.com), Gov ID: GOV999).
3. Enter Urban Issue details (Type: Pothole, Location: Main Street, Description: “Large pothole near intersection”).
4. Click “Submit”.

### Expected Result:

- A new Citizen record is created (if new).
- An Urban Issue record is created with assigned Department and auto-generated Issue Number.
- Status is set to “New”.

### Actual Result:

Issue Number	UI-0046		
Issue Title	Pothole		
Description	Large pothole near intersection		
Location			
Location Type	Main Street		
Issue Type	Pothole		
Created By	Koppada Prudhvi Vinayak		
	, 10/7/2025, 9:50 AM		
Owner	Koppada Prudhvi Vinayak		
Department	Public Works		
Status	New		
Priority	Urgent		
Citizen	Priya Sing		
Staff			
Assigned Staff			
Last Modified By	Koppada Prudhvi Vinayak		
	, 10/7/2025, 9:50 AM		

### Use Case / Scenario:

Approval Process for Urgent Urban Issue

Test Steps (with Input):

1. Create a new Urban Issue with Priority = “Urgent”.
2. Submit for approval.

Expected Result:

- Supervisor receives approval request email.
- Approval status is “Pending”.
- Upon approval, status updates to “Approved” and assigned staff is notified.

Actual Result:

Urban Issue Needs Your Approval Spam x

Koppada Prudhvi Vinayak via k9gul62gfy9xvv.fj-8q2u9eai.usa1044.bnc.salesforce.com to me ▾

Fri 3 Oct, 22:32 (4 days ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Hello , A new Urban Issue record requires your approval. - Issue Number: UI-0020 - Priority: Urgent - Status: New - Submitted By: Koppada Prudhvi Vinayak Please log in to Salesforce to review and approve or reject this issue. Thank you.

### **Use Case / Scenario:**

Validation Rule – Government ID Required

Test Steps (with Input):

1. Attempt to create a Citizen record without a Government ID.

Expected Result:

- Error message: “Government ID”.

Actual Result:

New Citizen

\* = Required Information

Information	
* Citizen Name	Prudhvi
Email	ravii.kumar@example.com
Phone Number	9999999999
Address	Kakinada

Owner  
Koppada Prudhvi Vinayak

Government ID

We hit a snag.

Review the following fields

• [Government ID](#)

Cancel Save & New Save

### **Use Case / Scenario:**

Duplicate Rule – Prevent Duplicate Citizens

Test Steps (with Input):

1. Attempt to create a Citizen with an email that already exists in the system.

Expected Result:

- System blocks creation and displays duplicate warning.

Actual Result:

## New Citizen

\* = Required Information

### Information

\* Citizen Name  Owner  Koppada Prudhvi Vinayak

Email

Phone Number

Address   
This record looks like an existing record. Make sure to check any potential duplicate records before saving.  
[View Duplicates](#)

Government ID

**!** [Cancel](#) [Save & New](#) [Save](#)

### Use Case / Scenario:

When a user creates a new Urban Issue and selects a Department, the system should automatically assign the issue to an available staff member within that department (using round-robin or any configured logic).

### Test Steps (with Input):

1. Log in as a user with permission to create Urban Issues (e.g., Department Staff or System Admin).
2. Go to the Urban Issue object and click New.
3. Fill in the required fields:
  - Issue Title: "Streetlight broken"
  - Description: "Streetlight not working at 5th Avenue."
  - Location: "5th Avenue"
  - Department: Select "Utilities" (or any department with at least one staff member assigned)
  - Other fields as required (e.g., Status, Priority)
4. Click Save.

## Expected Result:

- The new Urban Issue record is created.
- The Assigned Staff field is automatically populated with a staff member from the selected department (e.g., using round-robin assignment).
- If multiple staff are in that department, the assignment rotates based on the logic.
- The Assigned Staff member receives a notification (if configured).

## Actual Result:

**New Urban Issue**

---

\* = Required Information

**Information**

Issue Number

Issue Title

Streetlight broken

Description

Streetlight not working at 5th Avenue

Location

5th Avenue

Location Type

Industrial Area

Issue Type

Streetlight

Owner

**Koppada Prudhvi Vinayak**

Department

Utilites

Status

New

Priority

--None--

Citizen

**Koppada Prudhvi** (Selected)

Staff

Assigned Staff

Cancel

Save & New

Save

Issue Number	UI-0047	Owner	 Koppada Prudhvi Vinayak 
Issue Title	Streetlight broken	Department	
Description	Streetlight not working at 5th Avenue	Status	
Location	5th Avenue	Priority	
Location Type	Industrial Area	Citizen	
Issue Type	Streetlight	Staff	
Created By		Assigned Staff	
 Koppada Prudhvi Vinayak, 10/7/2025, 10:06 AM		777	
Last Modified By		Koppada Prudhvi Vinayak	
Last Modified On		10/7/2025, 10:07 AM	

### Use Case / Scenario:

When a user creates a new Urban Issue and selects a specific Location Type, the system should automatically set the Priority field according to predefined business rules (e.g., "Main Road" = Urgent, "Residential Area" = Medium).

### Test Steps (with Input):

1. Log in as a user with permission to create Urban Issues (e.g., Department Staff or System Admin).
2. Go to the Urban Issue object and click New.
3. Fill in the required fields:
  - Issue Title: "Garbage not collected"
  - Description: "Garbage has not been collected for 3 days."
  - Location: "Sector 10"
  - Location Type: Select "Main Road" (or another type according to your business rules)
  - Other fields as needed (do NOT set Priority manually)
4. Click Save.

### Expected Result:

- The new Urban Issue record is created.
- The Priority field is automatically set based on the selected Location Type (e.g., "Urgent" for "Main Road", "Medium" for "Residential Area", etc.).
- No manual input for Priority is required from the user.

## Actual Result:

**New Urban Issue**

\* = Required Information

**Information**

Issue Number <input type="text" value="UI-0048"/>	Owner Koppada Prudhvi Vinayak
Issue Title <input type="text" value="Garbage not collected"/>	Department <input type="text" value="Search Departments..."/>
Description <input type="text" value="Garbage has not been collected for 3 days."/>	Status <input type="text" value="--None--"/>
Location <input type="text" value="Sector 1"/>	Priority <input type="text" value="--None--"/>
Location Type <input type="text" value="Main Street"/>	Citizen Prudhvi
Issue Type <input type="text" value="Garbage"/>	Staff <input type="text" value="Search Staffs..."/>

Cancel
Save & New
Save

Issue Number UI-0048	Owner Koppada Prudhvi Vinayak
Issue Title Garbage not collected	Department Sanitation
Description Garbage has not been collected for 3 days.	Status New
Location Sector 1	Priority Urgent
Location Type Main Street	Citizen Prudhvi
Issue Type Garbage	Staff 22
Created By Koppada Prudhvi Vinayak, 10/7/2025, 10:20 AM	Assigned Staff 22
	Last Modified By Koppada Prudhvi Vinayak, 10/7/2025, 10:20 AM

## Conclusion

The Urban Issue Management System's implementation in Salesforce successfully addresses the city's need for a transparent, efficient, and citizen-focused platform for managing urban issues.

reporting and tracking urban infrastructure issues. The project's phased approach ensured robust data modeling, automation, integration, quality assurance, and user-centric design.

Key achievements include:

- Streamlined citizen issue reporting and tracking
- Automated assignment, approval, and notifications reducing manual workload
- Data quality enforced through validation and duplicate rules
- Reliable reporting and dashboards for city management oversight
- Secure, role-based access and compliance with data privacy standards
- Scalable architecture ready for future enhancements (IoT, analytics, etc.)

## Future Enhancements

Chatbot Integration:

Add an AI-powered chatbot to help citizens report issues, get instant updates, and answer FAQs, improving user engagement and support.

- AI Suggestions:  
Use AI/ML (e.g., Salesforce Einstein) to auto-suggest issue priorities, predict escalations, and recommend assignments, making resolution faster and smarter.
- Mobile App:  
Develop a mobile app with GPS, photo upload, and push notifications for easier field reporting by both citizens and staff.
- IoT & GIS Integration:  
Connect IoT sensors and mapping (GIS) to auto-detect issues and provide real-time location analytics.
- Community Portal:  
Enable forums, voting, and transparent feedback for greater citizen participation and trust.
- Advanced Analytics:  
Add more powerful dashboards, trend analysis, and export options for better city management decisions.
- Multi-language & Accessibility:  
Support additional languages and accessibility features to serve all citizens.

These enhancements will make the system smarter, more responsive, and ready for future city needs.