

## Phase 4: Process Automation (Admin)

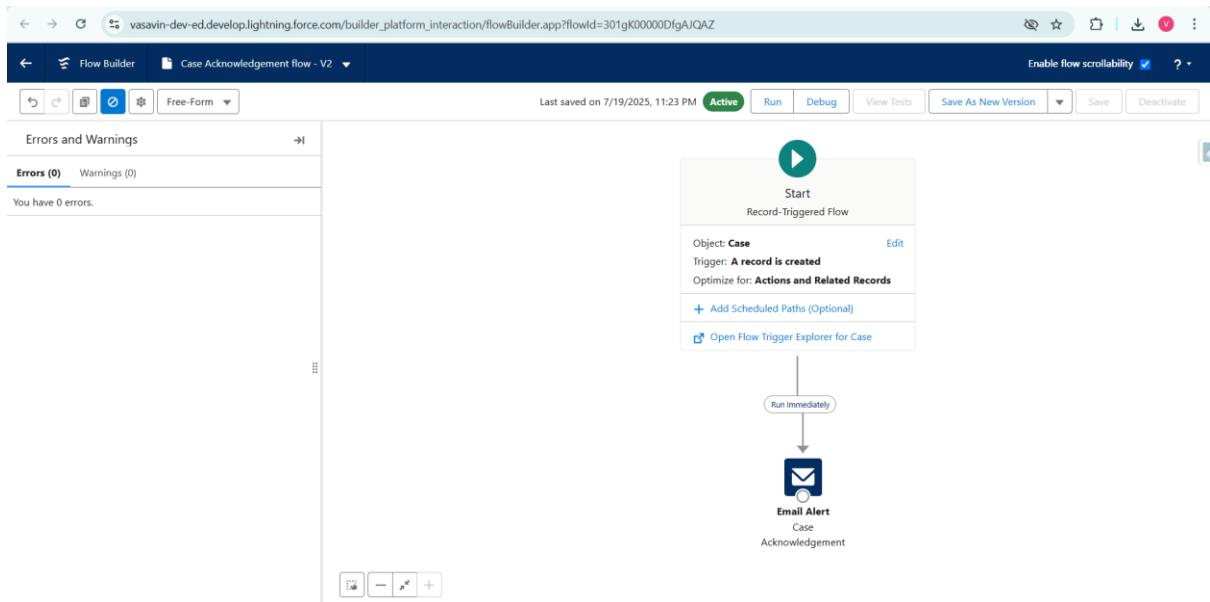
### Objective

To automate repetitive processes in Salesforce using **Flows, Validation Rules, and Email Alerts**, ensuring **efficiency, data accuracy, and timely communication** in case management without manual intervention.

### Key Flows Implemented

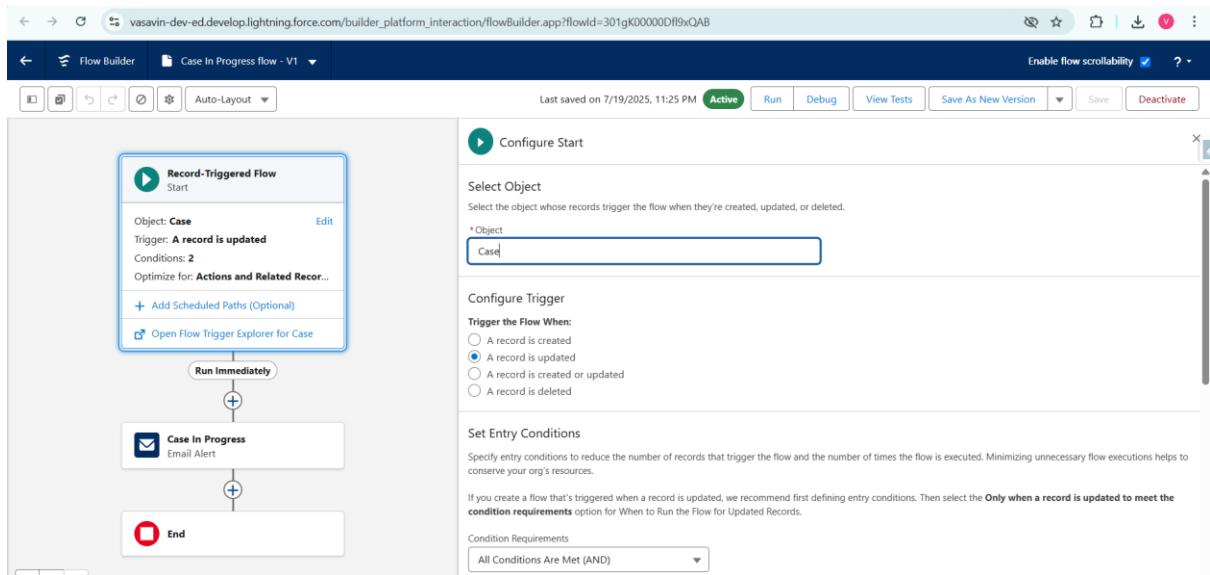
#### Flow 1: Case Acknowledgement Notification

- **Purpose:** Sends an email automatically when a new Case is created.
- **Setup Details:**
  - Flow Type: **Record-Triggered Flow**
  - Object: **Case**
  - Trigger: **When a record is created**
  - Condition Requirements: None
  - Optimize Flow For: **Actions and Related Records**
- **Action Element:**
  - Element: **Email Alert**
  - Label: Case Acknowledgement Notification
  - Email Alert Used: **Case Acknowledgement**
  - Record ID: record.Id
- **Final Steps:**
  - Save Flow as **Case\_Acknowledgement\_Flow**
  - Activate the flow



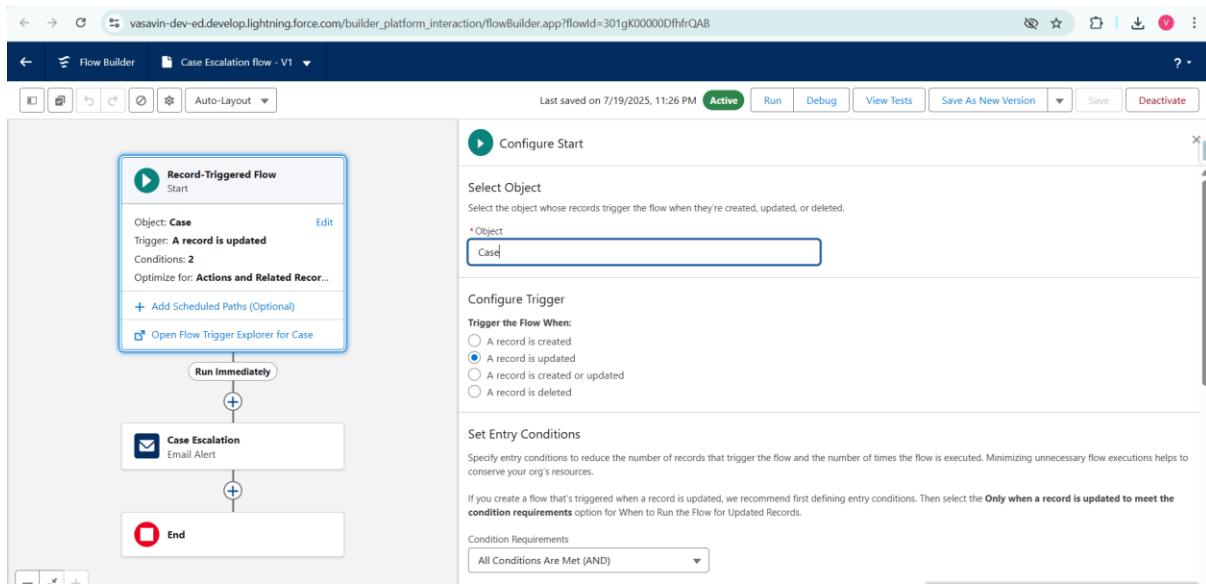
## Flow 2: Case In Progress Notification

- **Purpose:** Sends an email when a case status changes to **Working**.
- **Setup Details:**
  - Flow Type: **Record-Triggered Flow**
  - Object: **Case**
  - Trigger: **When a record is updated**
  - Condition Requirements (AND Logic):
    - Status = Working
    - ISCHANGED(Status) = True
  - Optimize Flow For: **Actions and Related Records**
- **Action Element:**
  - Element: **Email Alert**
  - Label: Case In Progress Notification
  - Email Alert Used: **Case In Progress**
  - Record ID: record.Id
- **Final Steps:**
  - Save Flow as **Case\_In\_Progress\_Flow**
  - Activate the flow



### Flow 3: Case Escalation Notification

- **Purpose:** Sends an email when a case status changes to **Escalated**.
- **Setup Details:**
  - Flow Type: **Record-Triggered Flow**
  - Object: **Case**
  - Trigger: **When a record is updated**
  - Condition Requirements (AND Logic):
    - Status = Escalated
    - ISCHANGED(Status) = True
  - Optimize Flow For: **Actions and Related Records**
- **Action Element:**
  - Element: **Email Alert**
  - Label: Case Escalation Notification
  - Email Alert Used: **Case Escalation**
  - Record ID: record.Id
- **Final Steps:**
  - Save Flow as **Case\_Escalation\_Flow**
  - Activate the flow



## Benefits of Process Automation

- Saves manual effort by automating **customer communication and notifications**.
- Improves **customer experience** with timely acknowledgments and updates.
- Standardizes communication using **reusable email templates**.
- Enhances **support team efficiency** through automated escalations and reminders.