

## Phase 4 Summary: Process Automation

**Project:** Retail Customer Complaint Hub

This phase makes the application functional by automating key business processes for managing customer complaints.

### 1. Validation Rule: Product Required for Defect Type

- **Purpose:** To ensure high-quality data by requiring a product to be specified for product-related complaints.
- **How it Works:** The rule's formula checks if the **Complaint Type** is "Product Defect" while the **Product** field is blank. If this condition is met, an error message appears, and the user cannot save the record until a product is selected.

The screenshot displays the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a breadcrumb trail shows 'SETUP > OBJECT MANAGER' followed by 'complaint'. A left-hand sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'complaint Validation Rule' with a 'Back to complaint' link. Below the title is a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons. The details are as follows:

Validation Rule Detail		Active	✓
Rule Name	Product_Required_for_Defect_Type		
Error Condition Formula	AND( ISPIICKVAL(complaint_type__c, "Product Defect"), ISBLANK(Product__c) )		
Error Message	You must select a Product when the Complaint Type is "Product Defect"	Error Location	Top of Page
Description			
Created By	Gedda Manasa, 9/24/2025, 12:00 AM	Modified By	Gedda Manasa, 9/24/2025, 12:00 AM

At the bottom of the 'Validation Rule Detail' section, there are 'Edit' and 'Clone' buttons.

### 2. Flow: Complaint Creation Automation

- **Purpose:** To automatically assign new complaints and notify the customer that their issue has been logged.
- **How it Works:** This is a record-triggered flow that runs whenever a new **Complaint** record is created. It performs two key actions:
  - It updates the record owner to the "New Complaint Queue".

- It sends a "Complaint Received" email confirmation to the customer to let them know their complaint was logged.

**Setup** Home Object Manager

Search Setup

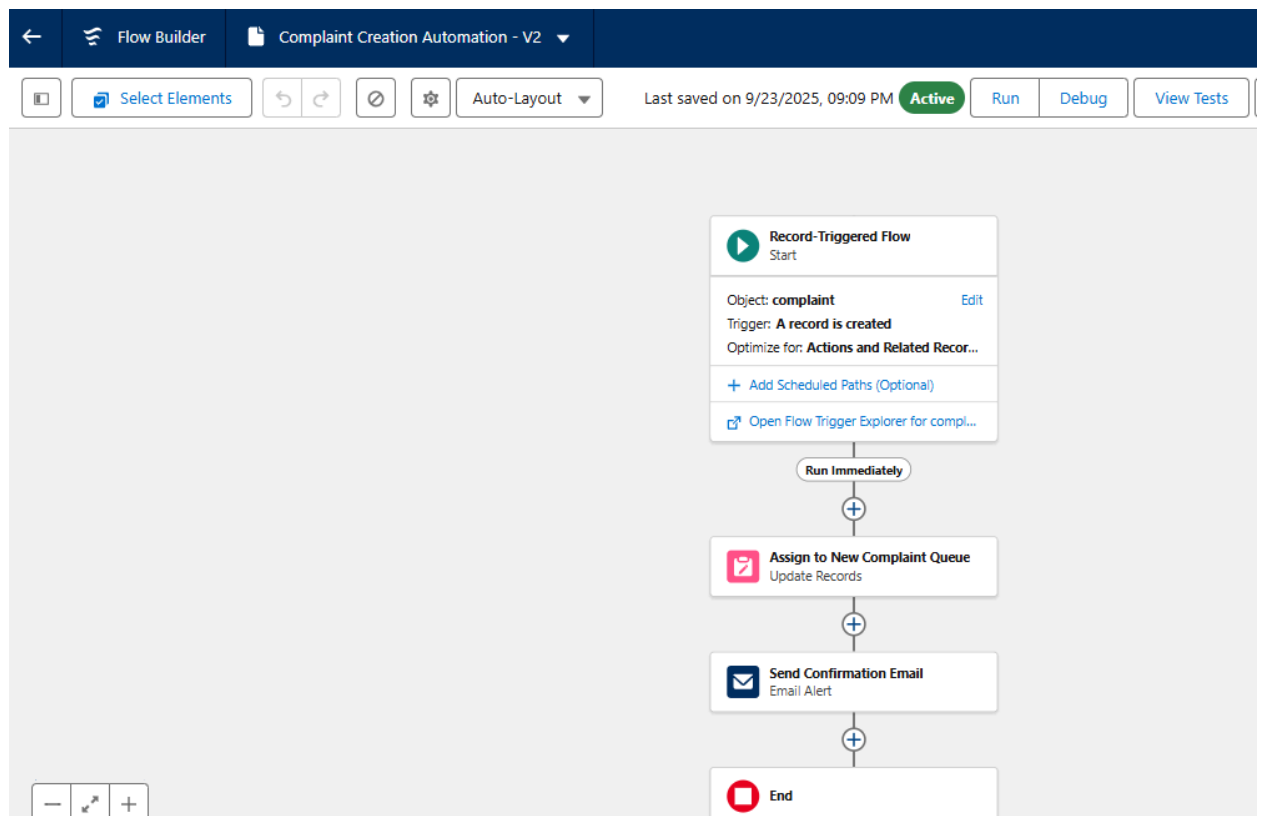
**Queues**

Queue: **New Complaint Queue**

Label	New Complaint Queue	Queue Name	New_Complaint_Queue
Queue Email		Send Email to Members	<input type="checkbox"/>
Supported Objects	complaint	Routing Configuration	
Queue Description		Created By	Gedda Manasa 9/24/2025, 12:03 AM
		Modified By	Gedda Manasa 9/24/2025, 12:03 AM

View All Users

Name	Type
Rohanu Srinija	User



### 3. Approval Process: High-Value Compensation

- **Purpose:** To create a formal review and approval process for high-value customer compensations.
- **How it Works:** The process can be started for any complaint where the **Compensation Amount** is greater than 500. When submitted:
  - The approval request is automatically assigned to the submitter's manager<sup>11</sup>.
  - An initial submission action updates the complaint's **Status** field to "Under Review".

The screenshot shows the Salesforce Setup interface for the 'High-Value Compensation' approval process. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Approval Processes' section with a search bar and a list of processes. The 'High-Value Compensation' process is selected, showing its details. The process is active and has a unique name of 'High\_Value\_Compensation'. The entry criteria is 'complaint: Compensation Amount GREATER THAN 500'. The record editability is 'Administrator ONLY'. The initial submission actions are 'Record Lock' and 'Field Update'.

**Approval Processes**

complaint: High-Value Compensation

« Back to Approval Process List

**Process Definition Detail**

Process Name: High-Value Compensation

Unique Name: High\_Value\_Compensation

Description: complaint: Compensation Amount GREATER THAN 500

Entry Criteria: complaint: Compensation Amount GREATER THAN 500

Record Editability: Administrator ONLY

Approval Assignment Email Template: complaint Owner

Initial Submitters: complaint Owner

Created By: Geddamuri Manasa, 9/24/2025, 6:20 AM

Modified By: Geddamuri Manasa, 9/24/2025, 6:22 AM

**Initial Submission Actions**

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Field Update	Field Update	Update Status to Under Review