

SALESFORCE PROJECT

PROJECT TITLE: AI-Powered Smart Case Routing

PROBLEM: Customer support teams face challenges in efficiently prioritizing and routing cases. Manual triage causes delays, dissatisfied customers, and poor SLA compliance.

Phase 4: Automation

A. Validation Rules

Purpose: Ensure case data integrity.

Object: Case

Case Description Required → ISBLANK(Description) → Prevents saving a Case without a description.

Priority Required for Escalation → If Sentiment_C__c = 'Negative' then Priority_Level__c must not be blank.

B. Workflow Rules (Legacy – for explanation only)

Use Case 1: Case Priority = High → Email Alert

Criteria: Priority_Level__c = 'High'

Action: Send email to Support Manager.

Use Case 2: Case Closed → Field Update

Criteria: Status = Closed

Action: Update Escalated__c = False.

C. Process Builder (Being Deprecated)

Use Case: Automate case escalation.

Example: When Sentiment_C__c = 'Negative' AND Priority_Level__c = 'High' → Update Escalated__c = True + Notify Manager.

D. Approval Process

Use Case: Ensure only Managers approve escalations.

Object: Case

Criteria: If Sentiment_C__c = 'Negative' and Priority_Level__c = 'High'.

Steps:

Case submitted for approval.

Manager reviews escalation.

If approved → Case remains assigned to Senior Queue.

If rejected → Case reassigned to default Junior Queue.

E. Flow Builder (Recommended Approach)

Flows are the **primary automation tool** for this project.

Record-Triggered Flow → Case Routing

Object: Case

Trigger: On Create

Condition: Sentiment_C__c != NULL

Action:

If Sentiment_C__c = Negative AND Priority_Level__c = High →
Assign to Senior Agent Queue + Email Manager.

Else → Assign to Junior Agent Queue.

Scheduled Flow → SLA Monitoring

Object: Case

Schedule: Daily at 9 AM

Criteria: Case Open > 48 hours without response

Action: Escalate to Manager.

Screen Flow → Case Creation Form (optional)

Captures Subject, Description, Priority.

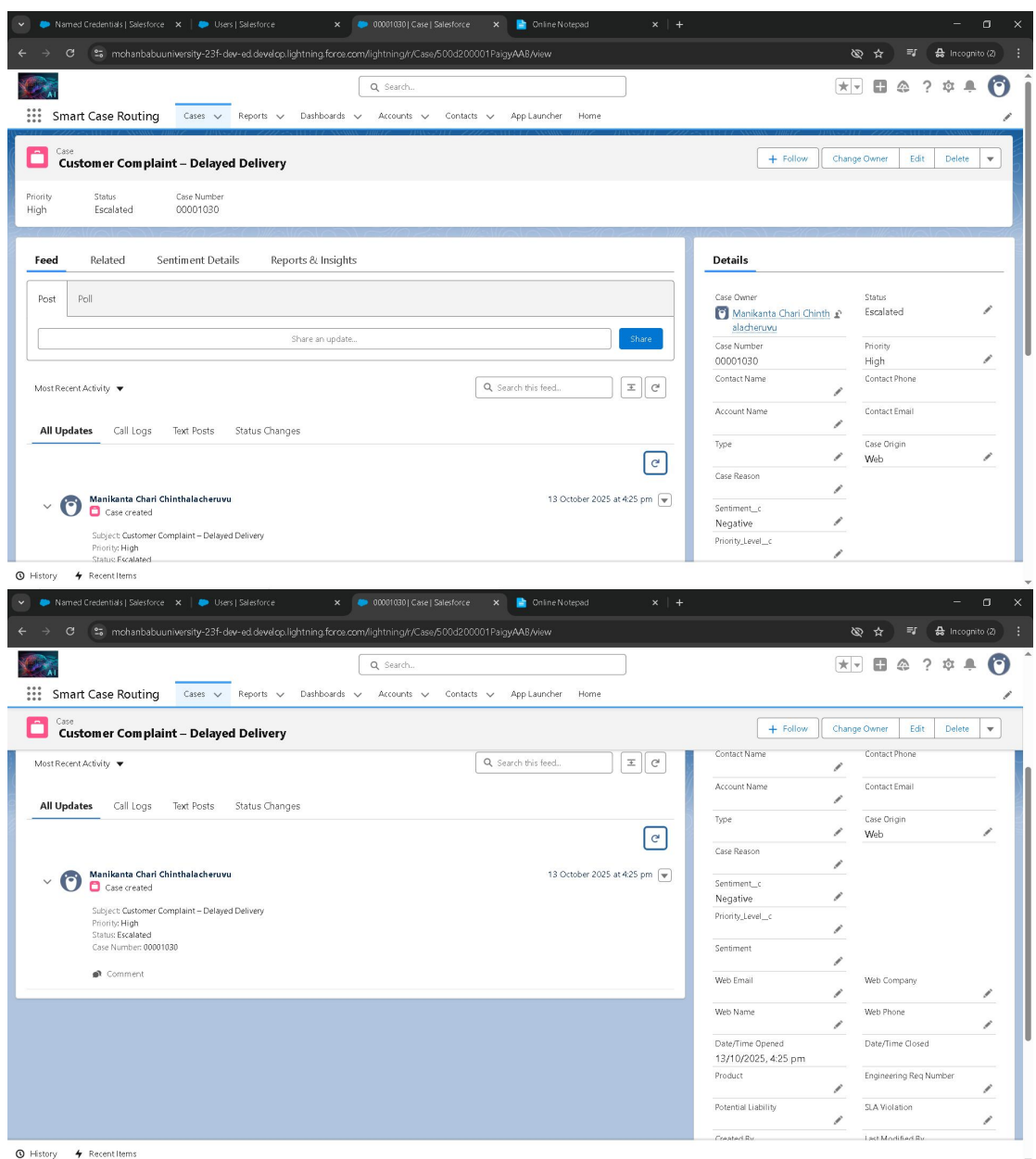
Auto-calls Apex for sentiment detection.

F. Email Alerts

Case Escalated → Email to Support Manager.

Case Assigned → Email to Agent.

Case Closed → Email to Customer with resolution summary.



Screenshot: Flow Builder canvas with Case Routing decision element