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 = '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 = '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 = '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 != NULL
>>
>> Action:
>>
>>> If Sentiment__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.