Title: Integrated Sales ansd Service Management System

Phase 4: Process Automation (Admin)

Objective:
Automate business processes in Salesforce to ensure efficiency, accuracy, and timely action. This phase focuses on using **Flow Builder**, **Email Alerts**, and **automated record updates** to streamline Case handling.

Automation in Phase 4 ensures:

- SLA deadlines are automatically set.

- Support team is notified for high-priority cases.

- Users see and interact with records based on their role (Sales vs Support).

1. Record-Triggered Flow: Case SLA & Feedback Automation

Purpose:

- Automatically calculate and update the SLA Due Date for Cases.

- Generate Feedback records linked to the Case and Account.

- Notify the Support Team when a Case is High Priority.

Steps Implemented:

1. **Create Flow**

   o Go to: **Setup → Flows → New Flow → Record-Triggered Flow**

   o Select Object: **Case**

   o Trigger: **A record is created or updated**

   o Run the Flow: **After the record is saved**

2. **Add Flow Elements**

   A. Update SLA Due Date

   o Click + → **Update Records**

   o Label: Update SLA Due Date

   o Select **Use the Case record that triggered the flow**

   o Field to Update: SLA Due Date

   o Formula: CreatedDate + 2 (Adds 2 days to the creation date of the Case)

o Click Done

B. Decision Element – Check Case Priority

o Click + → **Decision**

o Label: Check Case Priority

o Outcome: High Priority → Condition: Priority Equals High

o Default Outcome: Other priorities

o Click Done

C. Create Feedback Record

o Click + → **Create Records**

o Label: Create Feedback

o Object: Feedback

o How Many Records to Create: One

o Field Values:

  ▪ Linked Case → {!$Record.Id}

  ▪ Account → {!$Record.AccountId}

  ▪ Comments → "Auto-generated feedback"

  ▪ Rating → Leave blank or default

o Click Done

D. Send Email Notification (High Priority Only)

o Click + → **Action** → **Send Email**

o Label: High Priority Case Alert

o Recipient: (Support User)

o Sender Type: Default Workflow User

o Subject: "High Priority Case Alert: {!$Record.CaseNumber}"

o Body (Rich Text):

o Case Number: {!$Record.CaseNumber}

o Subject: {!$Record.Subject}

o Priority: {!$Record.Priority}

o Status: {!$Record.Status}

o Account: {!$Record.AccountId}

  o Related Record ID: {!$Record.Id}

  o Click Done

3. **Connect Flow Elements**

Start → Update SLA Due Date → Decision: High Priority
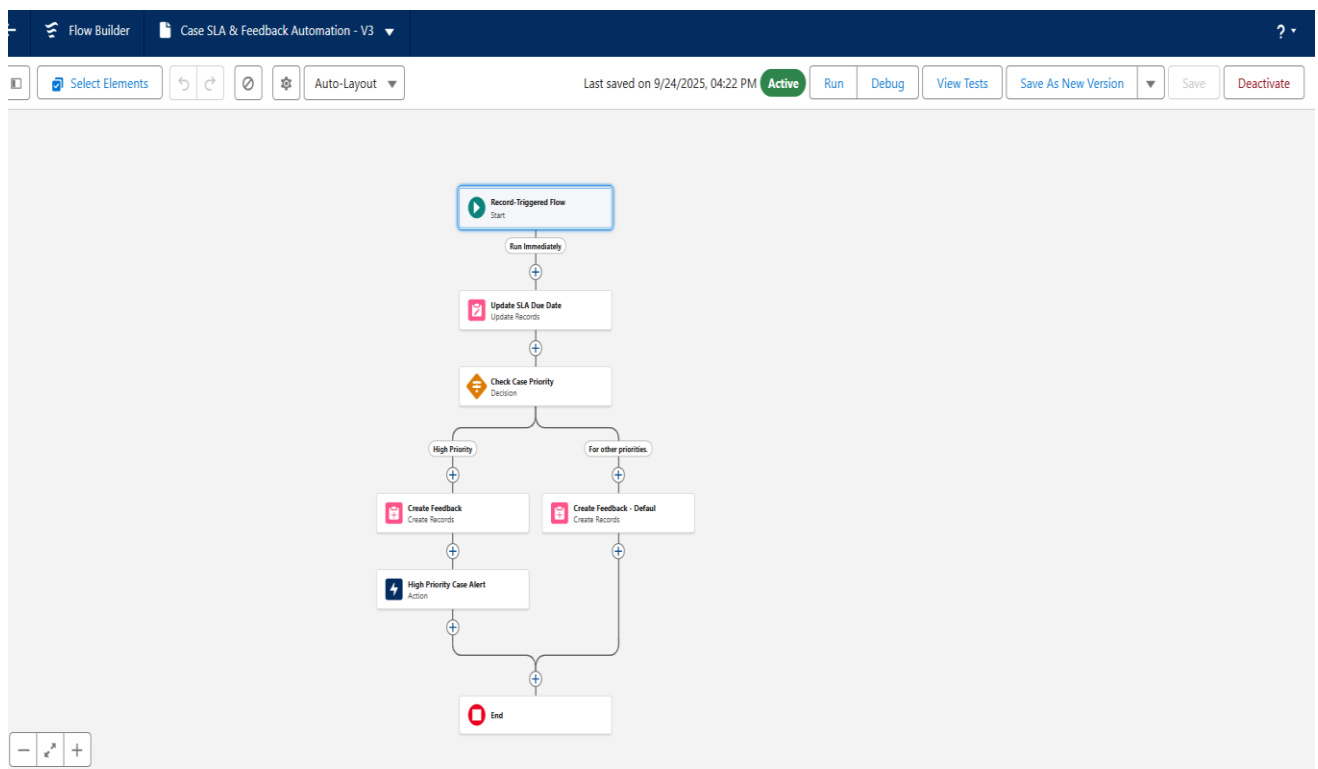
├── High Priority → Create Feedback → Send Email → End

└── Default → Create Feedback → End

4. **Save & Activate Flow**

  o Name: "Case SLA & Feedback Automation"

  o Click Save → Click Activate

Explanation:

- This flow ensures **every case has an SLA Due Date** automatically set.

- High priority cases **trigger email alerts**, so support users respond immediately.

2. Email Notifications

Purpose:
Keep the Support Team informed about High Priority Cases for timely action.

Implementation in Flow:

- Only triggers when **Priority = High**.

- Recipient: (assigned support user in project)

- Sender: Default Workflow User (System admin)

- Body: Includes Case Number, Subject, Priority, Status, Account

Why:

- Automates communication.

- Reduces manual checking of cases.

- Ensures SLA compliance.

3. Feedback Creation Automation

Purpose:
Automatically record customer feedback for every case.

Implementation:

- Executed via **Flow after Case creation/update**

- Links Feedback to Case and Account automatically

- Predefined values:

    o Comments → "Auto-generated feedback"

    o Rating → Default or blank

Benefit:

- Centralizes feedback collection without manual intervention

- Ensures Feedback is always linked correctly

4. SLA Due Date Automation

Purpose:
Automatically calculate and assign a due date for resolving the case.

Implementation:

- Executed in Flow immediately after case creation

- Formula used: CreatedDate + 2 (adds 2 days)

Benefit:

- Avoids manual errors

- Standardizes SLA tracking

Details

Case Owner	**Status**
📷 Ravi Sree Pappireddy	New
Case Number	**Priority**
00001033	High
Contact Name	**Contact Phone**
Ravi Kumar	09493426562
Account Name	**Contact Email**
Acme Corporation	ramyasreepappireddy2005@gmail.com
Type	**Case Origin**
.	Email
Case Reason	
Time Spent	
SLA Due Date ⓘ	
9/26/2025, 3:38 AM	
Customer Priority	