

# Salesforce Project: Service Request Management System

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## 1. Project Overview

The Service Request Management System is a custom Salesforce application designed to track and manage customer service requests. It allows customers to raise service tickets, automatically assigns them to support agents, tracks status, escalates unresolved requests, and provides dashboards for monitoring performance.

## 2. Object Design

Custom Object: Service\_Request\_\_c

- Customer\_\_c (Lookup to Contact)
- Product\_\_c (Lookup)
- Status (Picklist: New, In Progress, Resolved, Closed)
- Priority (Picklist: Low, Medium, High)
- Assigned\_To\_\_c (Lookup to User)
- Due\_Date\_\_c (Date)
- Resolution\_Notes\_\_c (Long Text)
- Escalated\_\_c (Checkbox)

Custom Object: Product\_\_c

- Name
- Serial\_Number\_\_c
- Warranty\_Expiry\_\_c
- Product\_Type\_\_c

## 3. Flow Automation

1. Record-Triggered Flow: Assigns agent on creation of Service\_Request\_\_c.
2. Scheduled Flow: Checks for overdue requests and marks Escalated\_\_c = true. Sends escalation

email.

## **4. Apex Triggers**

Before Insert Trigger:

- Validates if product is under warranty.

After Update Trigger:

- Sends resolution email if Status = 'Resolved'.

## **5. Apex Helper Class**

Class Name: ServiceRequestHelper

- Methods: assignAgent(), sendResolutionEmail(), isUnderWarranty()

## **6. Test Classes**

Test class covers:

- Valid and invalid product warranty cases
- Auto-assignment
- Resolution email
- Code coverage > 85%

## **7. Lightning Web Components (LWC)**

1. CreateServiceRequest: Form for creating service requests.
2. MyServiceRequests: Shows logged-in user's assigned requests.
3. ServiceRequestDetail: Updates status and notes.

## **8. App Creation**

App Name: Service Request Manager

- Tabs: Service Requests, Products, Contacts, Dashboards
- Custom record pages with embedded LWC components.

## **9. Reports & Dashboards**

- Open vs Closed Requests
- Requests by Product Type

- Escalated Requests per Month
- Agent Performance

