## Phase 4: Process Automation (Admin)

### Validation Rules

Case: A validation rule will prevent a case from being closed if the Resolution\_Notes\_\_c field is empty.

ServiceRequest: Ensure that the LoanAmount\_\_c field is a positive number before saving.

### Approval Process

Case Escalation: An approval process will automatically send a case to the team lead for approval if its status changes to "Escalated."

### Flow Builder

Record-Triggered Flow: A flow will automatically update the Status of a case to "In Progress" when a service agent starts working on it.

Screen Flow: A guided screen flow will walk a service agent through the process of creating a new case, ensuring all necessary information is captured.

Email Alert: A flow will send a custom email to the customer every time their case status is updated.

## Phase 5: Apex Programming (Developer)

### Apex Triggers

Case: A trigger will automatically create a ServiceRequest record and associate it with the Case if the Sub-Category is "Loan Application." This ensures that loan-related cases follow a specific, documented process.

### SOQL & SOSL

Case History: Use SOQL queries to retrieve a customer's entire case history to display on the Account page.

### Scheduled Apex

A scheduled Apex job will run every night to identify and automatically close cases that have been in a "Resolved" state for more than 7 days, if the customer has not responded.

### Test Classes

Write Apex test classes to cover the trigger logic, ensuring that a ServiceRequest record is correctly created for loan applications and that the scheduled job functions as expected.