

Phase 4 Report: Must-Have Process Automation (Admin)

Goal

Automate critical telecom workflows in Salesforce to reduce manual work, improve service turnaround, and keep customers informed in real time.

1. Validation Rules

Purpose: Ensure data integrity and prevent incomplete/incorrect records.

- **Customer Email Validation**

- Formula: NOT(CONTAINS>Email, "@")
- Error: "Enter a valid Email Address."

The screenshot shows the Salesforce Setup interface for the Customer object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Triggers. The main content area is titled 'Customer Validation Rule' and displays the details of a rule named 'Email_Format_Check'. The rule is active and has the formula 'NOT(CONTAINS>Email, "@")'. The error message is 'Please enter a valid email address.' The rule was created by 'savitri koparde' on 9/22/2025, 8:32 PM and modified by the same user on the same date and time.

Validation Rule Detail	
Rule Name	Email_Format_Check
Error Condition Formula	NOT(CONTAINS>Email, "@")
Error Message	'Please enter a valid email address.'
Description	
Created By	savitri koparde, 9/22/2025, 8:32 PM
Modified By	savitri koparde, 9/22/2025, 8:32 PM

- **Service Request Priority Validation**

- Formula: AND(ISPICKVAL(Request_Type__c, "Network Issue"), ISBLANK(TEXT(Priority__c)))
- Error: "Priority is required for Network Issues."

Impact: Prevents bad customer data and enforces business rules.

The screenshot shows the 'Service Request Validation Rule' configuration page in the Salesforce Object Manager. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Validation Rule Detail' for 'Priority_Required_For_Network_Issues'. The rule is active and has the formula: AND(ISPICKVAL(Request_Type__c, "Network Issue"), ISBLANK(TEXT(Priority__c))). It includes an error message: "Priority is required when Request Type = Network Issue." and is associated with the 'Priority' error location. The rule was created by Savitri Koparde on 9/22/2025 at 8:34 PM.

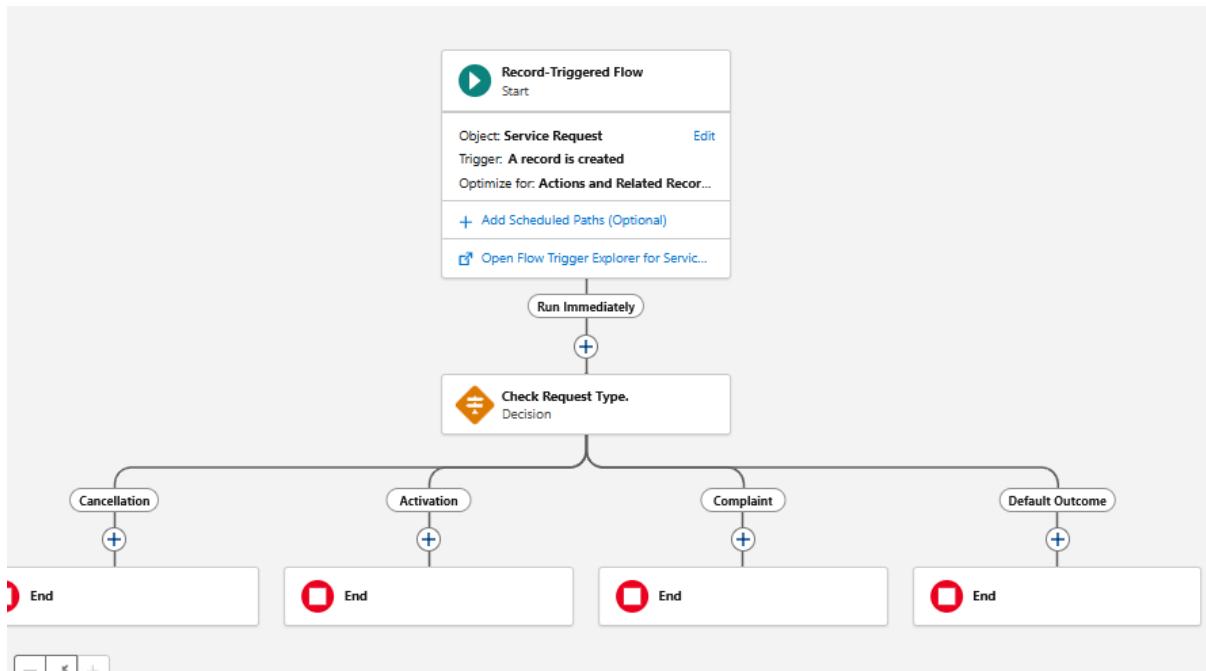
Field	Value
Rule Name	Priority_Required_For_Network_Issues
Error Condition Formula	AND(ISPICKVAL(Request_Type__c, "Network Issue"), ISBLANK(TEXT(Priority__c)))
Error Message	"Priority is required when Request Type = Network Issue."
Description	
Created By	savitri koparde, 9/22/2025, 8:34 PM
Modified By	savitri koparde, 9/22/2025, 8:34 PM

2. Flow Builder (Record-Triggered)

Purpose: Automate request handling and SIM status updates.

- **Round-Robin Assignment Flow**

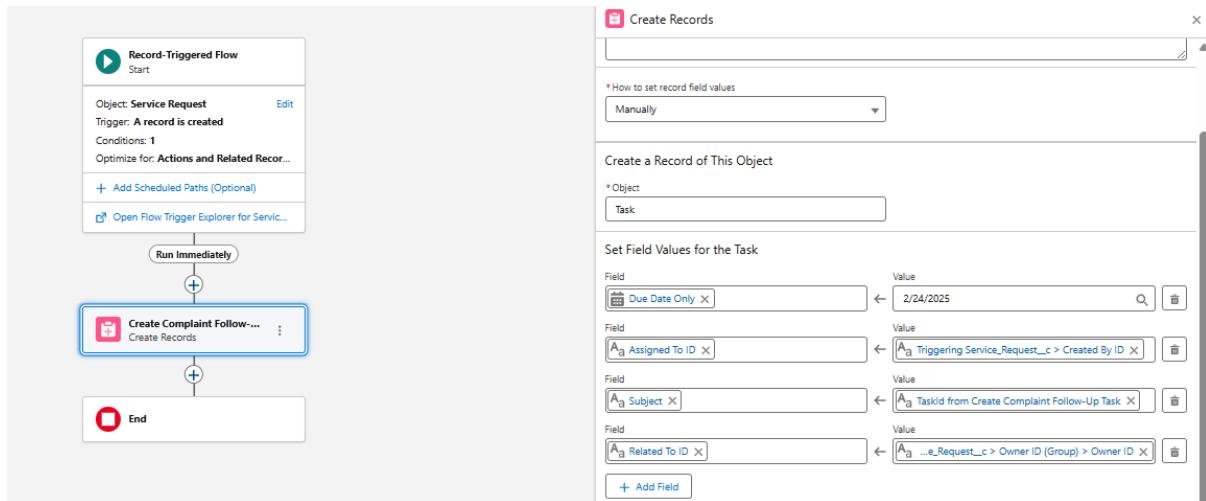
- Trigger: On ServiceRequest__c creation.
- Logic: Distributes requests evenly among active Agents.
- Outcome: No manual assignment needed, balanced workload.



- **SIM Cancellation Flow**

- Trigger: When Request_Type = Cancellation.
- Logic: Auto-updates Customer__c.Status = Inprogress.
- Outcome: SIM instantly deactivated, no agent action required.

Impact: Fast response, reduced manual errors, higher customer satisfaction.



3. Email Alerts

Purpose: Keep customers informed automatically.

- **Activation Confirmation** → “Your SIM {SIM Number} has been activated successfully.”
- **Cancellation Confirmation** → “Your SIM has been deactivated.”

Impact: Customers receive real-time updates, boosting trust.

The screenshot shows two separate screenshots from the Salesforce Setup interface.

Top Screenshot: Classic Email Templates

This screenshot shows the creation of a new email template named "SIM_Cancellation_Notification". The template details are as follows:

Email Template Detail	Value
Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	SIM_Cancellation_Notification
Template Unique Name	SIM_Cancellation_Notification
Encoding	Unicode (UTF-8)
Author	savitri koparde [Change]
Description	
Created By	savitri koparde 9/25/2025, 12:42 AM
Available For Use	✓
Last Used Date	
Times Used	

Bottom Screenshot: Email Alerts

This screenshot shows the creation of a new email alert named "Notify customer on SIM Cancellation". The alert details are as follows:

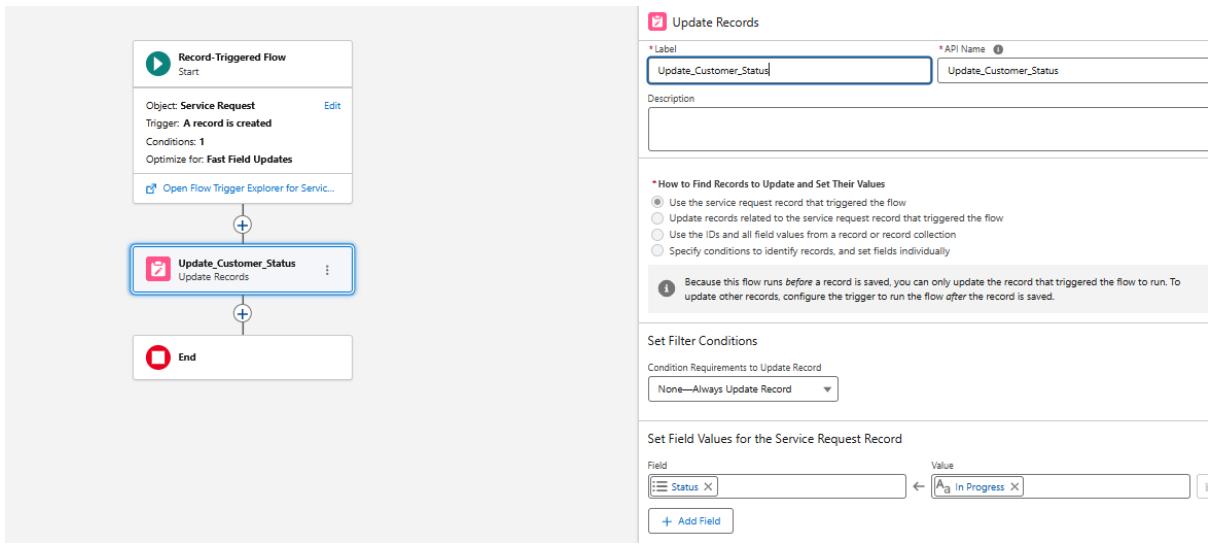
Email Alert Detail	Value
Description	Notify customer on SIM Cancellation
Unique Name	Notify_customer_on_SIM_Cancellation
From Email Address	Current User's email address
Recipients	User_Agent1_Telcom User_Agent2_Telcom
Additional Emails	savitrikoparde12@gmail.com
Created By	savitri koparde 9/25/2025, 12:59 AM
Email Template	SIM_Cancellation_Notification
Object	Service Request
Modified By	savitri koparde 9/25/2025, 5:13 AM

4. Field Updates

Purpose: Maintain accurate record states automatically.

- **Resolved Request Auto-Close**
 - Condition: When ServiceRequest__c.Status = Resolved.
 - Action: Update Status = Closed.

Impact: Ensures consistent lifecycle tracking of service requests.



5. Tasks

Purpose: Drive timely follow-ups for customer complaints.

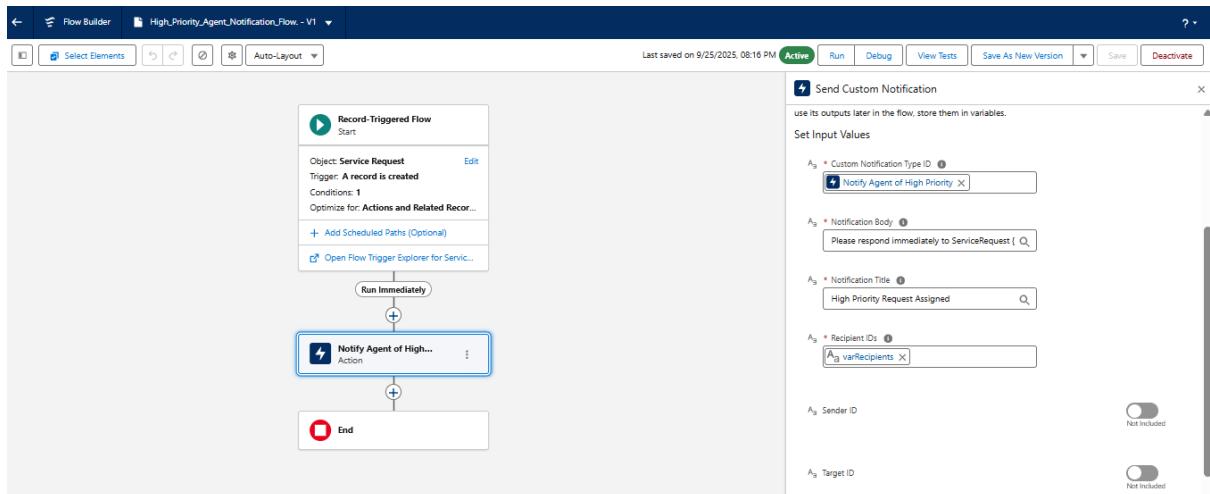
- **Complaint Follow-Up Task**
 - Trigger: When Request_Type = Complaint.
 - Auto-created Task:
 - Subject: “Follow up with Customer”
 - Due Date: 2 hours from request creation.

Impact: Agents act quickly on complaints, reducing churn risk.

6. Custom Notifications

Purpose: Escalate critical service requests to Agents/Managers.

- **Agent Notification:**
 - Trigger: When High Priority Service Request assigned.
 - Message: “⚠️ High Priority Request Assigned: Please respond immediately.”



- Manager Notification:

- Trigger: When approval or escalation required.
- Message: "Approval required for ServiceRequest #{!Id}."

Impact: Ensures immediate attention to high-risk cases.

