

# Phase 4: Process Automation (Admin)

## 1. Validation Rules

**Purpose:** Ensure data quality and prevent incorrect or incomplete complaint records.

**Usage:**

- Mandatory fields like **Customer Name**, **Complaint Type**, and **Status** were validated.
- Prevented automation errors in flows and emails due to missing information.

**Validation Rules**  
4 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
<a href="#">Complaint_Type_Required</a>	Complaint Type	Please select a Complaint Type	✓	<a href="#">Somya Nema</a> , 9/21/2025, 3:13 AM	▼
<a href="#">Customer_Name_Required</a>	Customer Name	Customer Name cannot be blank	✓	<a href="#">Somya Nema</a> , 9/21/2025, 3:12 AM	▼
<a href="#">Priority_Required</a>	Priority	Select Priority	✓	<a href="#">Somya Nema</a> , 9/21/2025, 3:14 AM	▼
<a href="#">Require_Resolution_On_Close</a>	Resolution	Resolution must be provided before closing a complaint.	✓	<a href="#">Somya Nema</a> , 9/20/2025, 9:47 AM	▼

## 2. Workflow Rules

Not used in this project. Replaced by **Flows** for modern automation.

## 3. Process Builder

Not used. All automation is implemented with **Record-Triggered Flows**.

## 4. Approval Process

**Purpose:** Ensure managerial approval before resolving complaints.

**Usage:**

- Created **Complaint\_Resolution\_Approval**.
- Entry Criteria: Complaint **Status** = **Resolved**.
- Initial Submitter: Complaint Owner.
- Assigned Approver: Manager (Somya Nema).

- Final Actions: Lock record on approval, unlock on rejection.
- Email Alerts sent to notify approver.

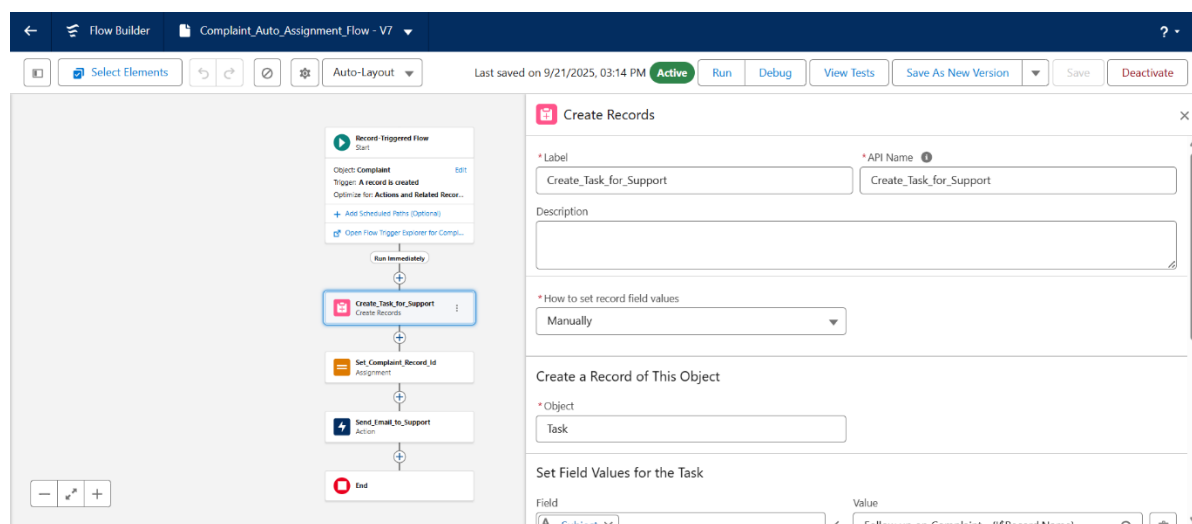
## 5. Flow Builder

**Type Used:** Record-Triggered Flows.

**Usage:**

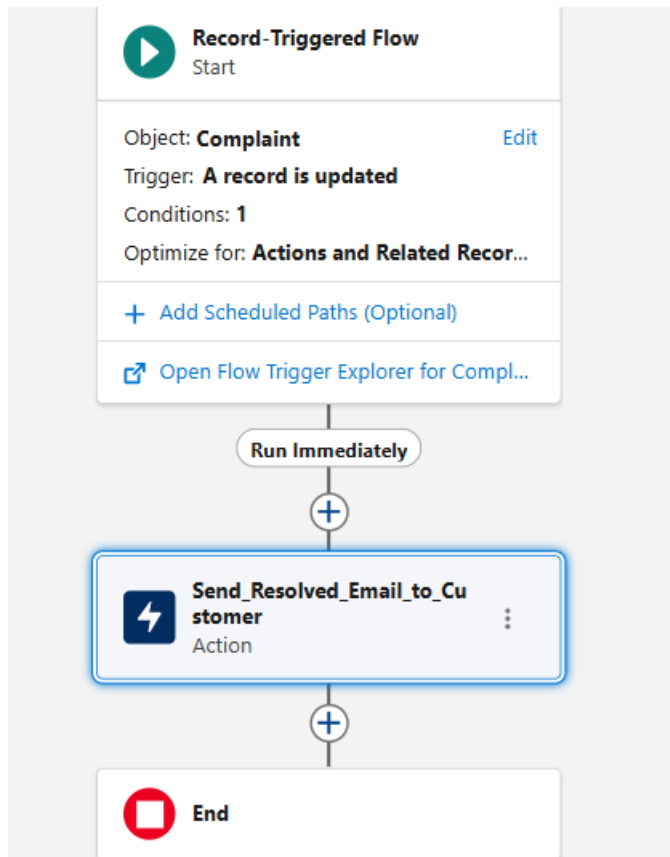
### 1. Flow 1 – Auto Assignment & Support Notification

- Triggered on complaint creation.
- Assigns complaint to **Support Queue**.
- Sends email to support with complaint details.
- Creates a follow-up **Task** automatically.



### 2. Flow 2 – Email to Customer

- Triggered when complaint status changes to **Resolved**.
- Sends email to customer notifying them of complaint resolution.



## 6. Email Alerts

**Purpose:** Automate communication to stakeholders.

**Usage:**

- Alert sent to **Support Team** when a new complaint is created.
- Alert sent to **Manager** on pending approval.
- Emails include complaint details: ID, Name, Type, and Status.





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## 7. Field Updates

**Purpose:** Automate record updates based on flow actions.

**Usage:**

- Updated **Complaint Owner/Assigned To** via flow to assign to Support Queue.
- Updated **Task fields** automatically for follow-up actions.

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## 8. Tasks

**Purpose:** Automate follow-up and track complaint progress.

**Usage:**

- **Task created automatically** when complaint is assigned.
- Fields set: Subject, Status (Not Started), Priority (High), Assigned To (Support Queue), Related To (Complaint record).

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## 9. Custom Notifications

**Purpose:** Internal alerts for immediate awareness.

**Usage:**

- Notifies **Support Team** when a complaint is assigned.
- Notification Title: **New Complaint Assign**
- Body: "Complaint CMP-XXXX has been created and assigned to you."