

Phase 4: Process Automation (Admin)

Project: Customer Complaint Management System

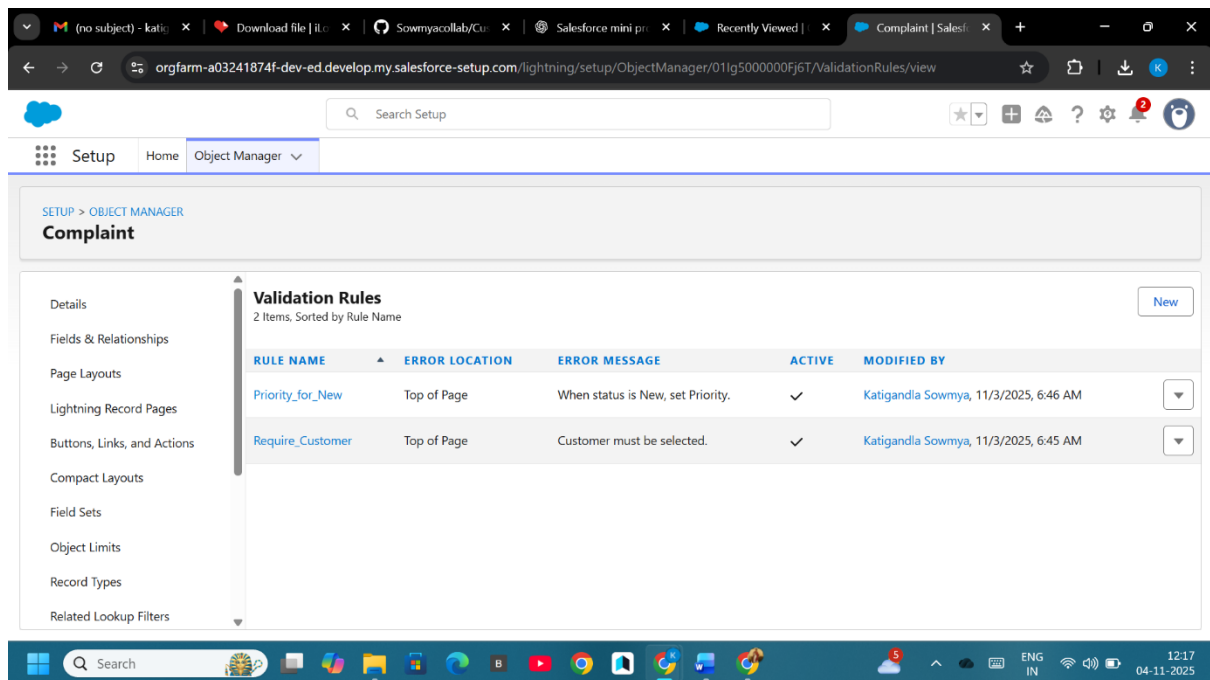
1. Validation Rules

Purpose: Ensure data quality and prevent incorrect entries.

Example 1 – Require Customer for Complaint

- **Object:** Complaint__c
- **Rule Name:** Require_Customer
- **Formula:**
- ISBLANK(Customer__c)
- **Error Message:** Customer must be selected before saving the complaint.

✓ **Use:** Ensures every complaint is linked to a valid customer.



Example 2 – Priority Required When Status = New

- **Rule Name:** Priority_for_New
- **Formula:**
- AND(ISPICKVAL(Status__c, "New"), ISBLANK(TEXT(Priority__c)))
- **Error Message:** Priority must be set when complaint is new.

✓ **Use:** Enforces proper prioritization before submission.

2. Workflow Rules (Legacy Automation)

Workflow rules perform simple automation tasks like sending email alerts or updating fields when conditions are met.

Example – Auto Email When Complaint Is Assigned

- **Object:** Complaint__c
- **Rule Criteria:**
- Status__c = "Assigned"
- **Action:** Send Email Alert → to Assigned Agent
- **Email Template:** Complaint Assigned Notification

✓ **Use:** Automatically notifies the assigned agent about a new complaint.

3. Process Builder (Advanced Point-and-Click Automation)

Process Builder lets you build more complex, multi-step automation flows.

Example – Auto Update Status When Complaint Resolved

- **Object:** Complaint__c
- **Trigger:** When record is edited and Status__c = "Resolved"
- **Immediate Action:**
 - Update Field: Resolution_Notes__c → "Complaint successfully resolved."
 - Send Email Alert → to Customer thanking them for their patience.

✓ **Use:** Automatically completes follow-up steps when a complaint is resolved.

4. Approval Process

Used when certain records (like refunds or escalations) need manager approval.

Example – Approval for Complaint Closure

- **Object:** Complaint__c
- **Entry Criteria:** Status__c = "Resolved" AND Priority__c = "High"
- **Steps:**
 1. Submitted by Agent → goes to Manager for approval.
 2. If Approved → Status changes to "Closed".
 3. If Rejected → Status changes back to "In Progress".

✓ **Use:** Ensures high-priority complaints are verified before closure.

5. Flow Builder (Modern Automation Tool)

Flow Builder is Salesforce's most powerful automation tool — replacing both Process Builder and Workflow Rules.

You can create different types of flows:

a. Record-Triggered Flow

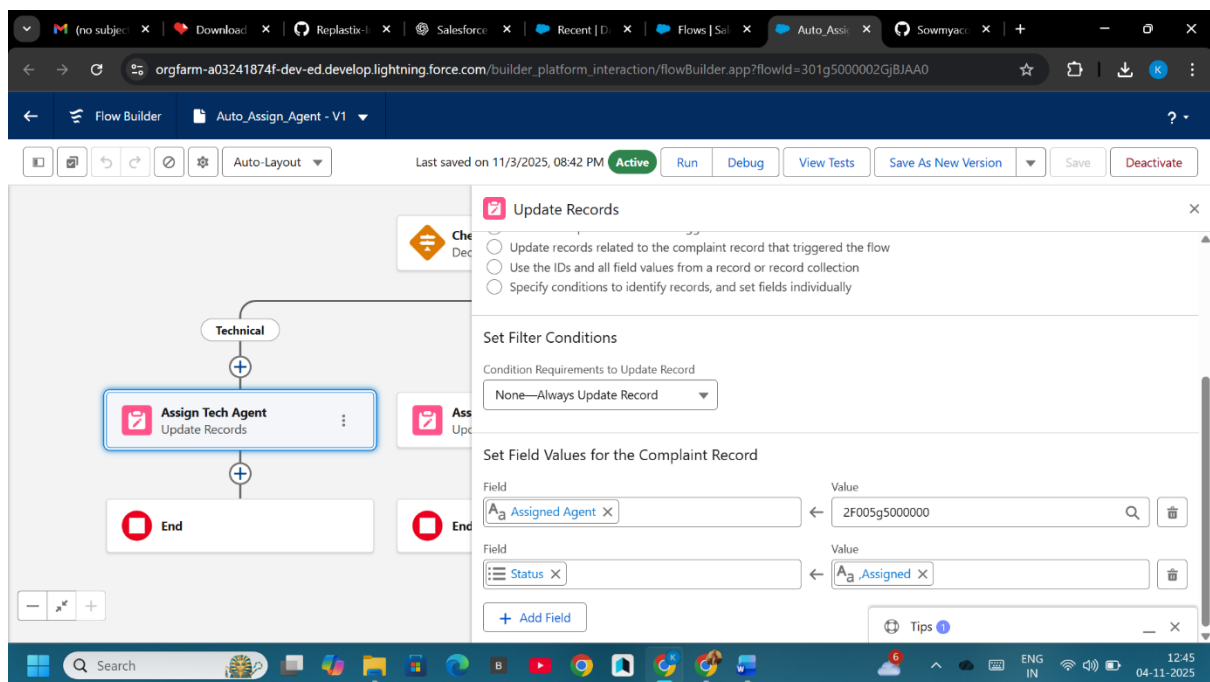
Triggered automatically when a record is created or updated.

Example:

When a new Complaint is created → Automatically assign an agent and send acknowledgment email.

- Object: Complaint__c
- Trigger: A record is created
- Actions:
 - Update Assigned_Agent__c
 - Update Status__c = “Assigned”
 - Send Email to Customer

✓ **Use:** Fully automates the complaint creation process.



b. Screen Flow

Used for user interactions — shows forms or screens to collect data.

Example:

Customer Service Agent uses a Screen Flow to:

- Search a customer
- Log a complaint
- Choose issue type and priority
→ Flow then creates a Complaint record automatically.

✓ **Use:** Guided data entry for non-technical users.

c. Scheduled Flow

Runs at specific intervals (daily, weekly).

Example:

Every night → Check complaints with **SLA_Target_Date__c < Today** and **Status ≠ Closed** → send escalation email to Manager.

✓ **Use:** Automates SLA tracking and escalations.

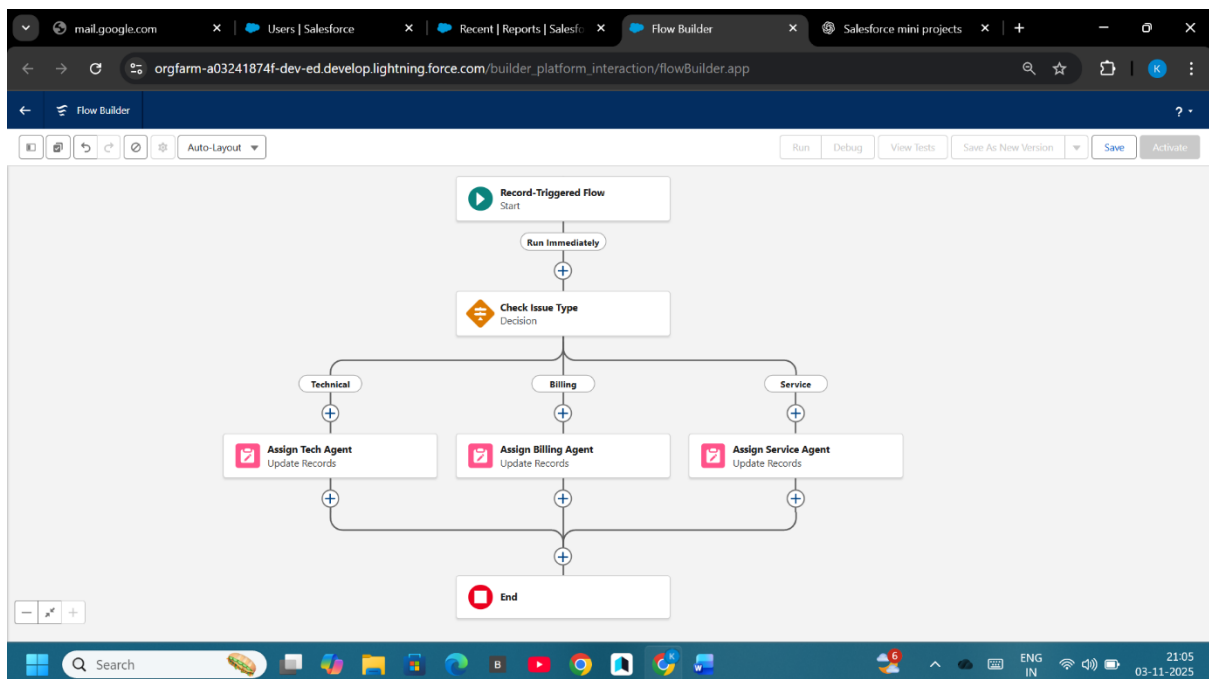
d. Auto-Launched Flow

No user interaction; triggered by another automation or Apex.

Example:

Triggered by Process Builder or Approval Process to update related customer metrics (like “Total Complaints”).

✓ **Use:** Background logic or reusable processes.



6. Email Alerts

Send pre-defined email templates automatically based on triggers or flows.

Example Templates:

- “Complaint Received” → Sent to Customer when new complaint created.
- “Complaint Assigned” → Sent to Agent when assigned.
- “Complaint Resolved” → Sent to Customer on closure.

✓ **Use:** Keeps both customer and support team informed.

7. Field Updates

Automatically change field values based on conditions.

Example:

- When Complaint is resolved, update **Resolution_Date__c = TODAY()**

- When Status = “Closed”, update **Priority__c** = “Low”

✓ **Use:** Reduces manual updates and maintains accurate records.

8. Tasks

Automatically assign tasks to users.

Example:

- When complaint created → create a Task for Assigned Agent:
 - **Subject:** “Follow up with Customer”
 - **Due Date:** TODAY() + 2

✓ **Use:** Ensures agents track and resolve issues within SLA.

9. Custom Notifications

Send in-app or mobile push notifications to Salesforce users.

Example:

When a complaint is escalated → send a **Custom Notification** to Manager saying:

“A high-priority complaint needs your attention!”

✓ **Use:** Real-time alerts inside Salesforce without using email.

Conclusion

In Phase 4, we built a **smart, automated system** that:

- Ensures **data accuracy** (Validation Rules)
- Automates **emails, status updates, and task creation**
- Provides **approval workflows** for high-priority issues
- Uses **Flow Builder** for complete automation
- Keeps teams notified and customers updated

This makes the **Customer Complaint Management System** more efficient, reduces manual work, and improves customer satisfaction.