

# 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.

The screenshot shows the Salesforce Object Manager interface for the 'Complaint' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows two items: 'Priority\_for\_New' and 'Require\_Customer'. The 'Require\_Customer' rule has a formula of 'ISBLANK(Customer\_\_c)' and an error message of 'Customer must be selected.' Both rules are active and were modified by Katigandla Sowmya on November 3, 2025.

Rule Name	Error Location	Error Message	Active	Modified By
Priority_for_New	Top of Page	When status is New, set Priority.	✓	Katigandla Sowmya, 11/3/2025, 6:46 AM
Require_Customer	Top of Page	Customer must be selected.	✓	Katigandla Sowmya, 11/3/2025, 6:45 AM

### 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**

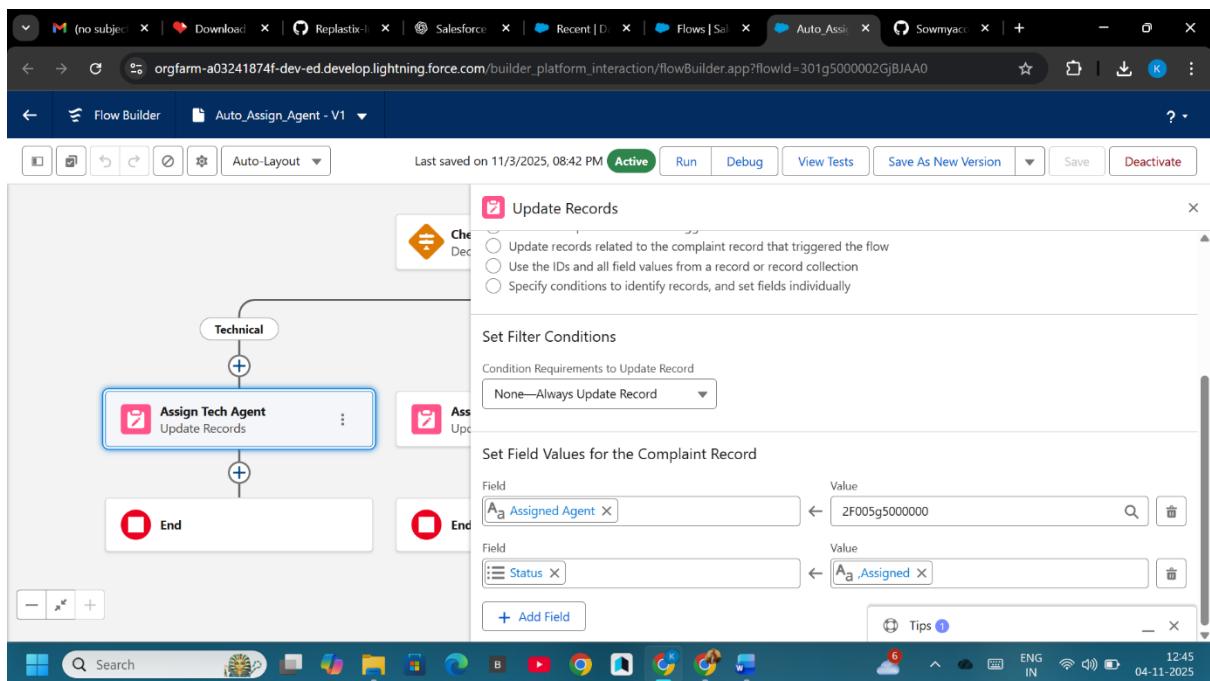
Triggered automatically when a record is created or updated.

#### 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.

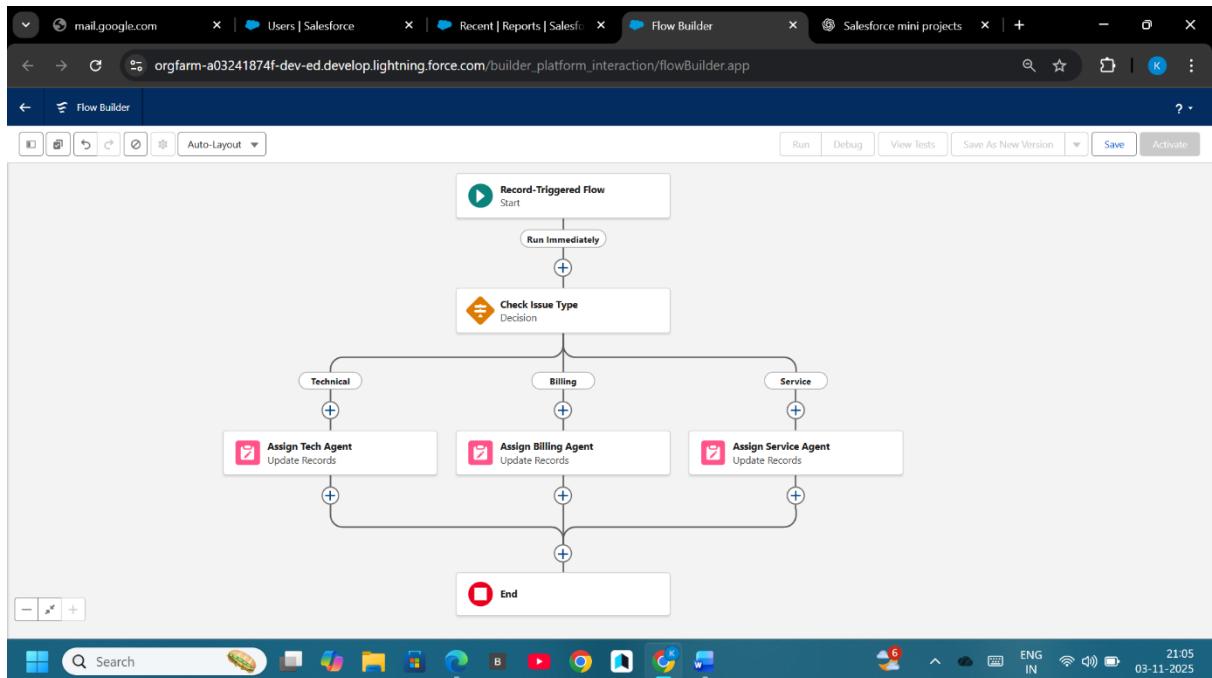
### **d. Auto-Launched Flow**

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.