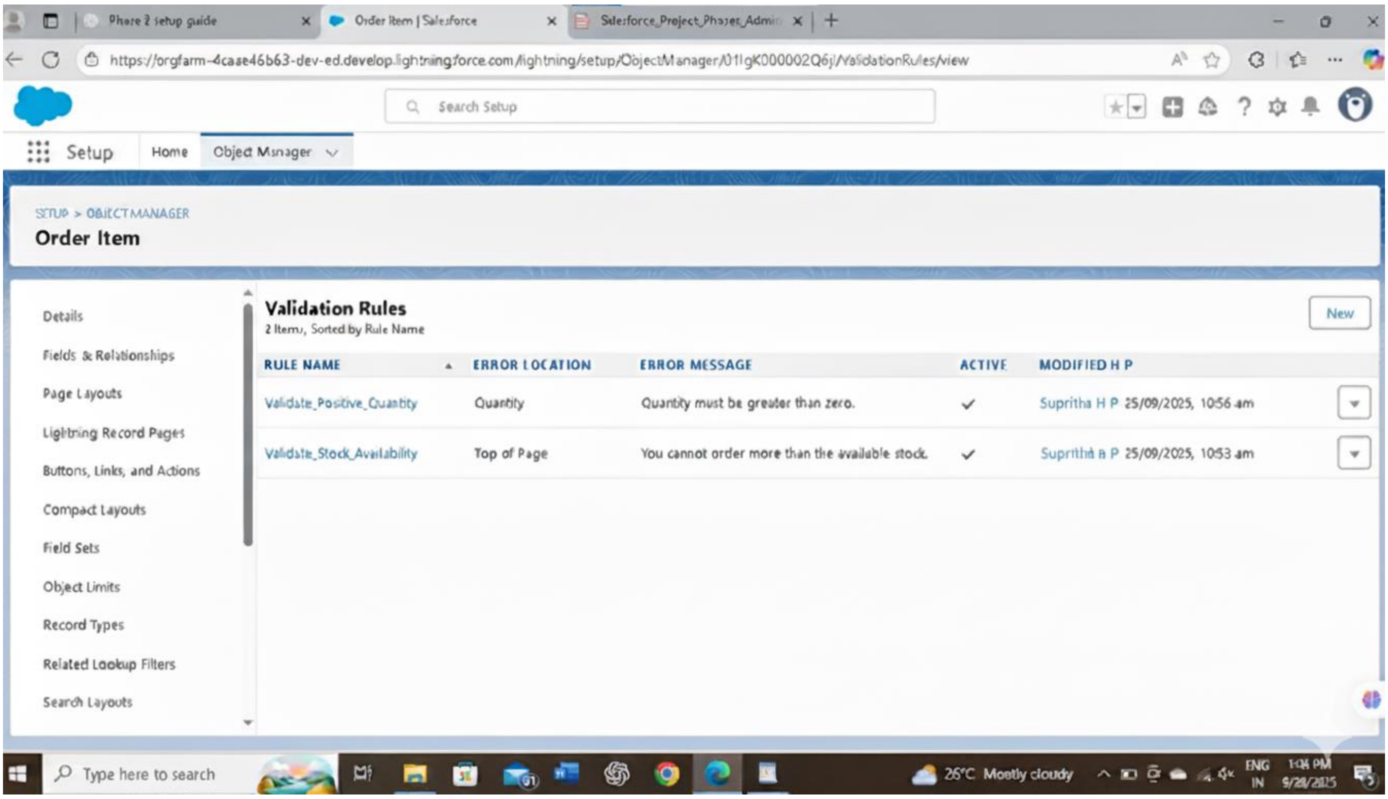
Phase 4 — Process Automation (Step-by-step)

Step 1 — Plan Automations & Objectives

• 1.1 Identify key automation goals: faster assignment, SLA enforcement, automatic escalation, and reporting.
• 1.2 Map events that trigger automations: Case creation, status changes, SLA breaches, customer replies.
• 1.3 Choose tools: Record-Triggered Flows (preferred), Assignment Rules, Omni-Channel, Entitlements & Milestones.

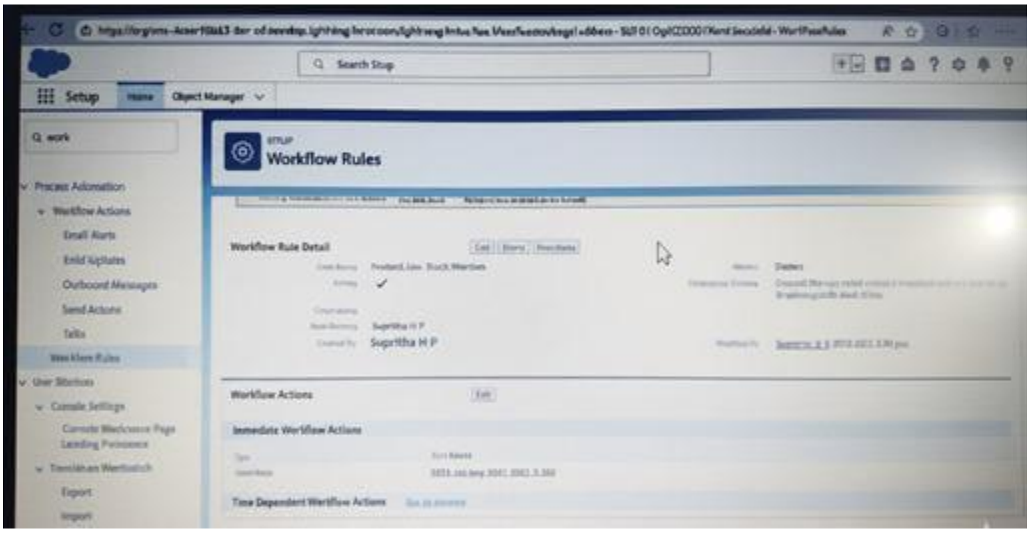
Step 2 — Create Validation Rules (Data Integrity)

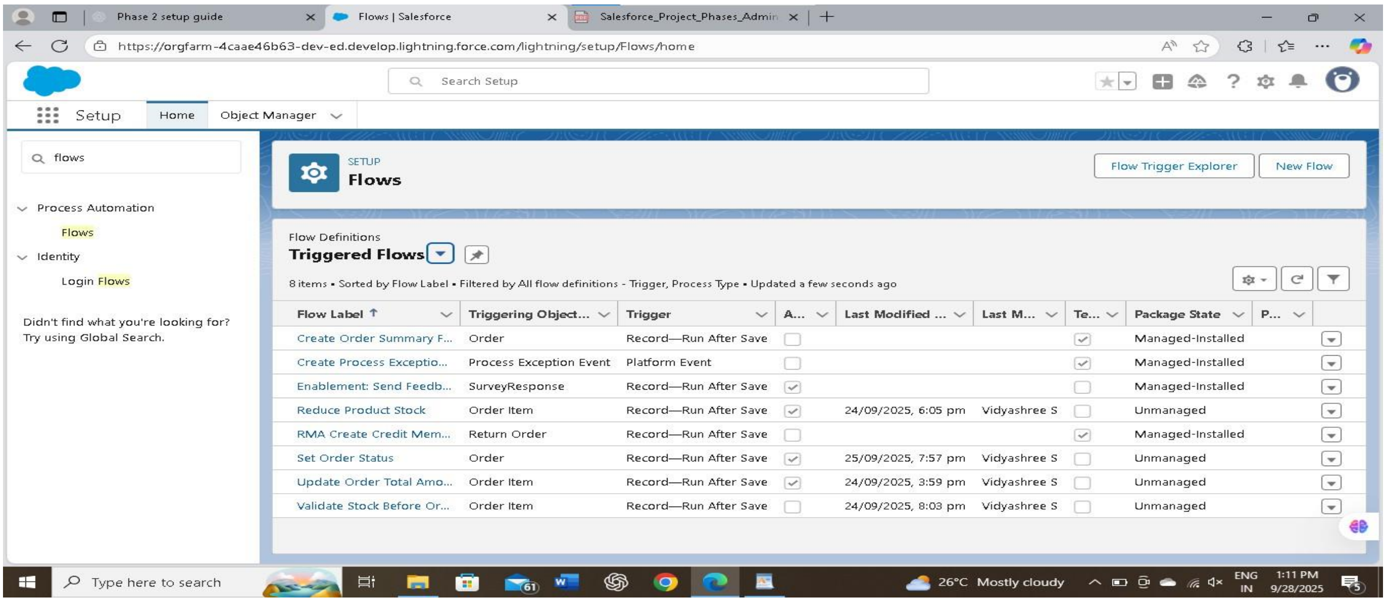
• 2.1 Setup → Object Manager → Case → Validation Rules → New.
• 2.2 Example: Require Category on new cases:
Formula: AND(ISPICKVAL(Status, 'New'), ISBLANK(TEXT(Category_c)))
Error: 'Please select a Category for new cases.'
• 2.3 Example: Prevent closing without resolution:
Formula: AND(ISPICKVAL(Status, 'Closed'), ISBLANK(Resolution_Notes_c))
Error: 'Add resolution notes before closing this case.'



Step 3 — Build Case Assignment Rules (basic routing)

• 3.1 Setup → Case Assignment Rules → New Rule → Name it (e.g., 'Initial Routing').
• 3.2 Add Rule Entries with order: criteria by Category, Severity, Product, or Account Type.
• 3.3 For each entry, set Assignment To → Queue or User and enable 'Assign using active assignment rule' on case creation where needed.


Search Setup
Setup
Home
Object Manager
SETUP
Workflow Rules
Workflow Rule Detail
Workflow Actions
Immediate Workflow Actions
Time-Dependent Workflow Actions


Phase 2 setup guide
Flows | Salesforce
Salesforce_Project_Phases_Admin
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Search Setup
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Home
Object Manager
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Process Automation
Flows
Identity
Login Flows
Didn't find what you're looking for? Try using Global Search.
SETUP
Flows
Flow Trigger Explorer
New Flow
Flow Definitions
Triggered Flows
8 items • Sorted by Flow Label • Filtered by All flow definitions - Trigger, Process Type • Updated a few seconds ago
Flow Label
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Create Order Summary F... Order Record—Run After Save Managed-Installed
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Enablement: Send Feedb... SurveyResponse Record—Run After Save Managed-Installed
Reduce Product Stock Order Item Record—Run After Save 24/09/2025, 6:05 pm Vidyashree S Unmanaged
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Update Order Total Amo... Order Item Record—Run After Save 24/09/2025, 3:59 pm Vidyashree S Unmanaged
Validate Stock Before Or... Order Item Record—Run After Save 24/09/2025, 8:03 pm Vidyashree S Unmanaged
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Step 4 — Set Up Omni■Channel & Routing Configs (real-time agent routing)

• 4.1 Setup → Omni-Channel → Service Channels → New (Service Channel = 'Cases').
• 4.2 Setup → Omni-Channel → Routing Configurations → New (set routing model: Least Active, Most Available, or Priority).
• 4.3 Create Presence Statuses & Presence Configurations; set user capacities and assign to agents.
• 4.4 Create Queues (Support Tier 1, Tier 2, Escalation) and associate them with Routing Configurations.

Step 5 — Create Skills for Skills■based Routing (optional)

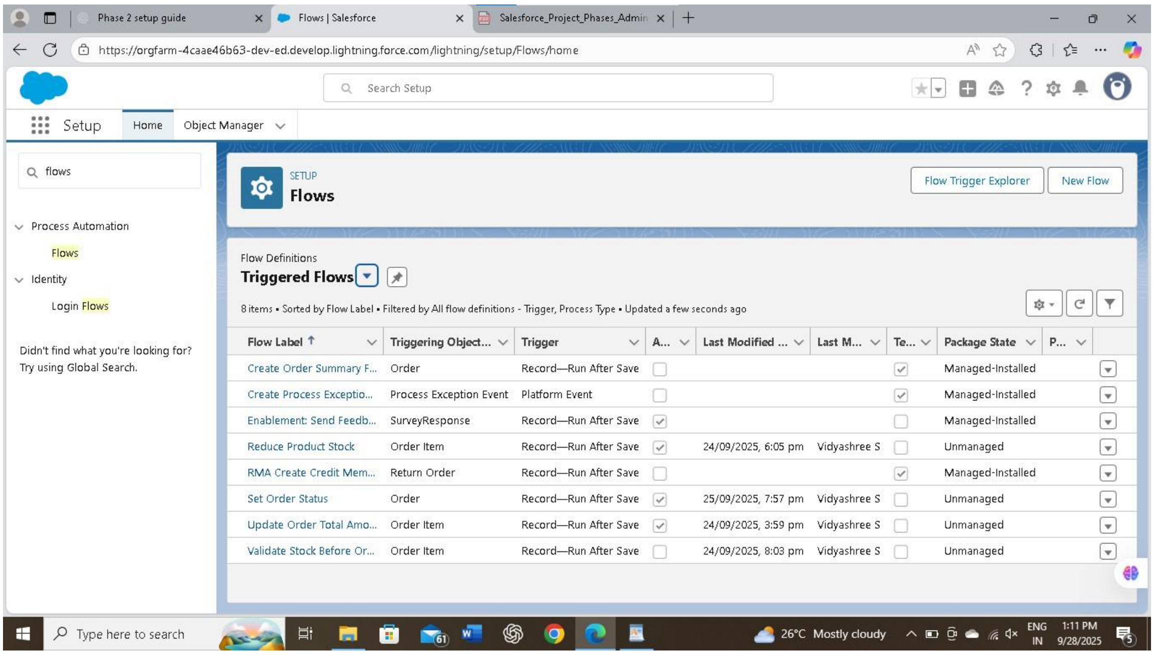
• 5.1 Setup → Skills → New Skill (e.g., 'Billing', 'Technical', 'Spanish').
• 5.2 Assign Skills to Users (Agent Profiles) and to Cases using a lookup or custom field.
• 5.3 Use Routing Configs that respect Skills for match-based routing via Omni-Channel.

Step 6 — Build Record■Triggered Flows for Smart Assignment

• 6.1 Setup → Flows → New → Record-Triggered Flow (Case) → Trigger on Create and Update (as needed).
• 6.2 Add Decision element to evaluate Category, Severity, SLA and custom RoutingRule__c matches.
• 6.3 Use Update Records (Change Owner) to assign OwnerId to User or Queue OR use 'Change Record Owner' action.
• 6.4 Create a CaseAssignment__c record (log) for audit: fields Case__c, RoutingRule__c, AssignedTo__c.
• 6.5 Optionally call 'Send Notification' actions or create Tasks for the newly assigned agent.

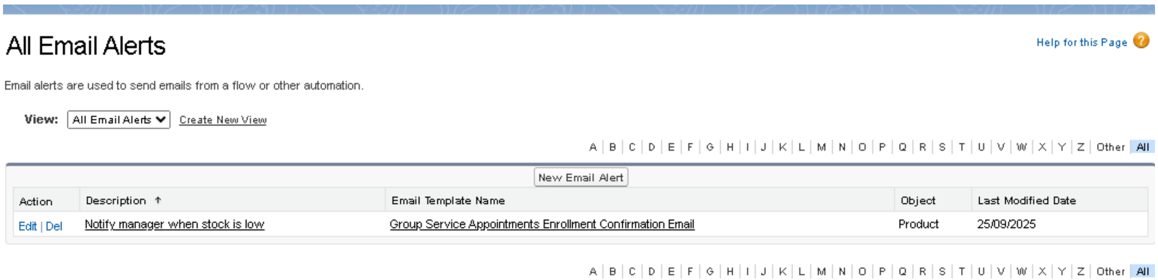
Step 7 — Implement SLA Enforcement with Entitlements & Milestones

7.1 Setup → Entitlements → New Entitlement Process (e.g., 'Standard Support SLA').
• 7.2 Create Milestones: 'First Response' (1 hour), 'Resolve' (72 hours).
• 7.3 Configure Milestone Actions: Email Alert, Post-Update, or Escalate Owner when missed.
• 7.4 Attach Entitlement to Cases automatically via Flow or Process when case meets criteria.



Step 8 — Time■Based Flows & Escalation Paths

• 8.1 Use Scheduled Paths in Record-Triggered Flows for time-based checks (e.g., 30 min, 4 hours).
• 8.2 Scheduled Path example: If First Response milestone not completed within 60 minutes → Update Owner to Escalation Queue and send notification.
• 8.3 Alternatively, use Case Escalation Rules (Setup → Case Escalation Rules) for classic time-based escalations.



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Step 9 — Approval Process for Special Exceptions

• 9.1 Setup → Approval Processes → Case → New Approval Process (e.g., 'Refund/Escalation Approval').
• 9.2 Define entry criteria (Case Type = 'Refund' OR Severity = 'Critical').
• 9.3 Define Approvers (Manager) and post-approval actions (Change Status to 'Escalated' or assign to specialist).

Step 10 — Notifications, Email Alerts & Templates

• 10.1 Create Email Templates (Classic or Lightning Email Templates) for assignments and SLA breach alerts.
• 10.2 Setup → Email Alerts → New: Tie to Flow or Escalation actions.
• 10.3 Create Custom Notifications (Setup → Notifications) and use Flow action 'Send Custom Notification' for in-app alerts.

Step 11 — Auto■Tasks & Follow■ups

• 11.1 Use Flow to Create Task on case assignment (Subject: 'Acknowledge Case', Due Date: Today + 1 hour).
• 11.2 Auto-create follow-up tasks when milestones are missed to ensure handoff tracking.

Step 12 — Testing (Sandbox) & Test Cases

• 12.1 Create a matrix of test cases: combinations of Category, Severity, Account Type, and Customer SLA.
• 12.2 Test each path: assignment rule, flow decision branch, Omni-Channel routing, scheduled path escalation, and approval flow.
• 12.3 Verify audit logs: CaseAssignment_c entries, Owner changes, email notifications, and milestones triggered.

Step 13 — Reports, Dashboards & Monitoring

• 13.1 Build Reports: 'Unassigned Cases by Queue', 'SLA Breaches', 'Average First Response Time by Agent', 'RoutingRule Matches'.
• 13.2 Create Dashboards for Support Managers to monitor backlog, SLA breaches, and agent load.
• 13.3 Schedule report subscriptions and alerts for SLA breach thresholds

Step 14 — Deploy, Train & Iterate

• 14.1 Migrate Flows, Assignment Rules, Email Templates from Sandbox to Production using Change Sets or SFDX.
• 14.2 Provide agent training documentation and run a pilot with a small tea
14.3 Collect feedback (Feedback__c) and iterate on RoutingRule__c and PriorityMatrix__c regularly.

Step 15 — Security, Permissions & Rollback Plan

• 15.1 Ensure profiles and permission sets allow 'Assign Cases', 'Run Flows', 'Edit Case' as required.
• 15.2 Set Flow version management and maintain rollback procedures (deactivate new flow versions if needed).
• 15.3 Keep backups of critical configuration metadata and document changes