

Phase 4: Process Automation for the Corporate IT Helpdesk System.

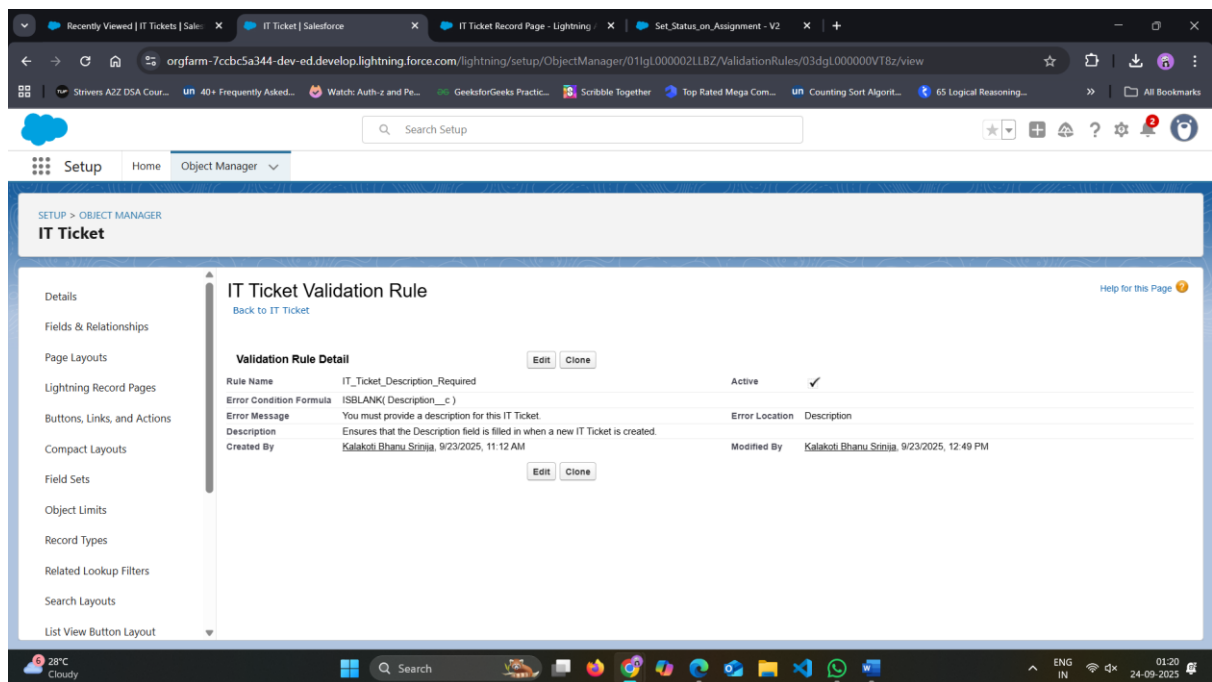
Phase 4: Process Automation

Project: Corporate IT Helpdesk System

This phase makes the application functional by automating key business processes for managing IT support tickets raised by employees.

1. Validation Rule: Issue Category Required for Ticket Submission

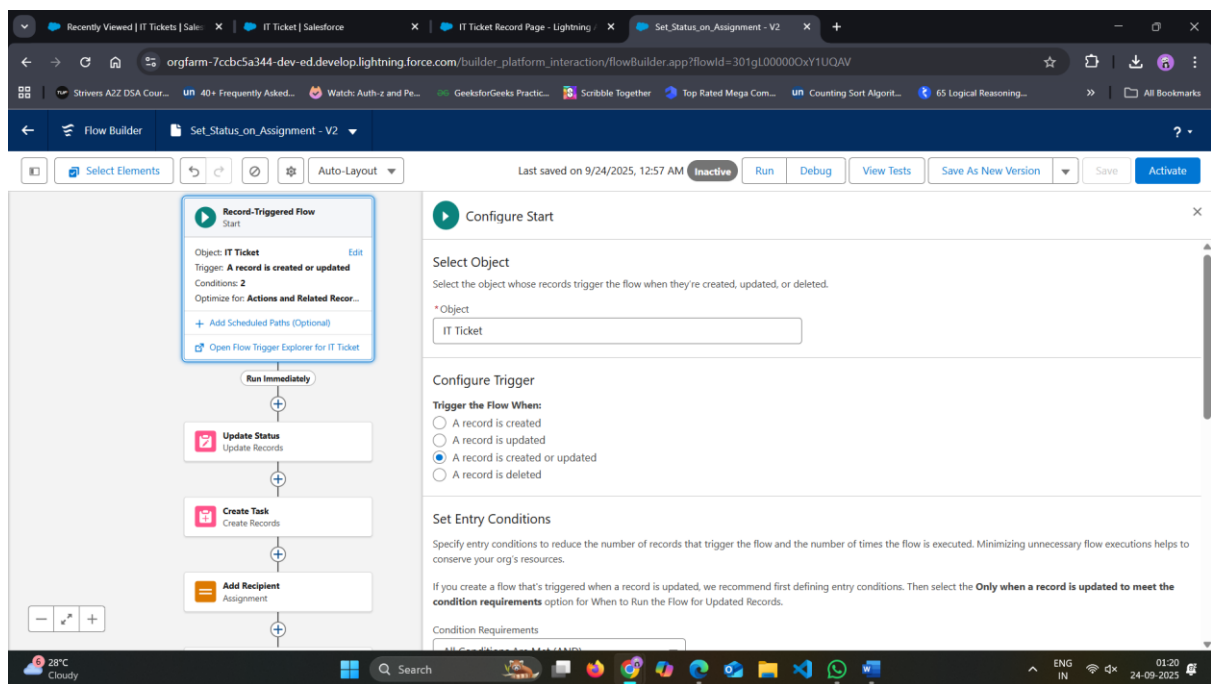
- **Purpose:** Ensure that every IT helpdesk ticket is properly categorized for faster triage and resolution.
- **How it Works:**
 - The rule checks if the "Issue Category" field is blank when a new ticket is created.
 - If blank, an error message appears, and the user cannot save the record until a category (e.g., Network, Hardware, Software, Access) is selected.



2. Flow: Ticket Assignment Automation

- **Purpose:** Automatically assign new tickets to the correct support team and notify the employee.
- **How it Works:**

- This is a record-triggered flow that runs when a new Helpdesk Ticket is created.
- **Key actions:**
 - Assigns the ticket to the appropriate queue based on Issue Category (e.g., Network issues → Network Support Queue).
 - Sends a "Ticket Received" email confirmation to the employee, providing a ticket number and initial status.



3. Approval Process: High-Priority or Sensitive Requests

- **Purpose:** Implement an approval process for tickets requiring special authorization (e.g., admin account access, procurement of costly hardware/software).
- **How it Works:**
 - The approval process starts if the Priority is set to "High" OR if the Request Type involves admin privileges/procurement.
 - **When submitted:**
 - The approval request is routed to the employee's manager for verification.
 - The ticket's status is updated to "Pending Approval" until reviewed.

The screenshot displays the Salesforce Setup interface for Approval Processes. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Approval Processes' and shows the details for the 'IT Ticket: IT Ticket Approval' process. The process is active and has a 'Record Lock' action defined in the Initial Submission Actions section.

Process Definition Detail	
Process Name	IT Ticket Approval
Unique Name	IT_Ticket_Approval
Description	IT Ticket: Priority EQUALS High
Entry Criteria	IT Ticket: Priority EQUALS High
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	IT Ticket Owner
Created By	Kalakoti Rhanu Srinija, 9/23/2025, 11:17 AM
Modified By	Kalakoti Rhanu Srinija, 9/23/2025, 11:18 AM

Initial Submission Actions	
Action	Type
Record Lock	Lock the record from being edited

Phase 4 Summary: Process Automation

1. **Validation Rule:** Issue Category Required for Ticket Submission
2. **Flow:** Ticket Assignment Automation
3. **Approval Process:** High-Priority or Sensitive Requests