

PHASE 4: Process Automation (Admin)

1. Flow Builder Automation

Salesforce **Flow Builder** was used to automate ticket-related actions and reduce manual effort in the support process.

Flow Configuration Details:

- Navigated to **Setup** → **Flows** → **New Flow**
- Selected **Record-Triggered Flow** as the flow type
- Configured the trigger:
 - **Object:** Customer Ticket
 - **Trigger Condition:** A record is created or updated
 - **Optimization:** Actions and related records
- Defined entry conditions such as:
 - Ticket creation
 - Ticket status change
 - Ticket assignment update

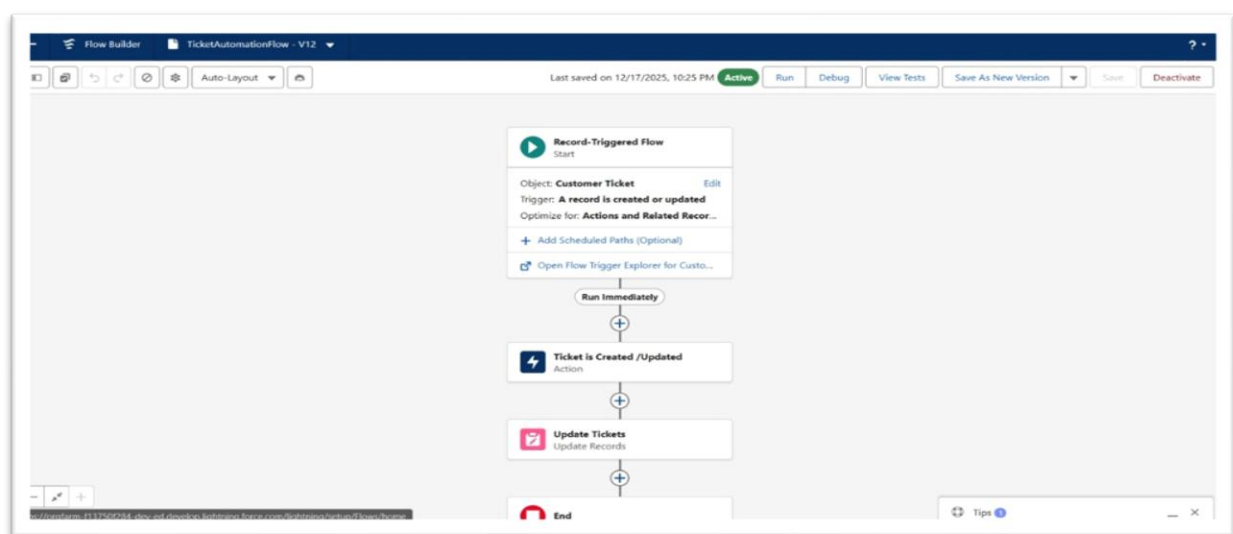
Flow Elements Used:

- **Send Email** action (Compose Email option)
- **Update Records** element to update ticket fields automatically

The flow was saved and activated after validation.

Outcome:

Automation reduced manual intervention in ticket assignment and status updates.



2. Email Alerts

Instead of predefined email templates, the **Compose Email Content** option was used directly within the Flow Builder, as shown in the implementation.

Use Case: Ticket Creation / Assignment Notification

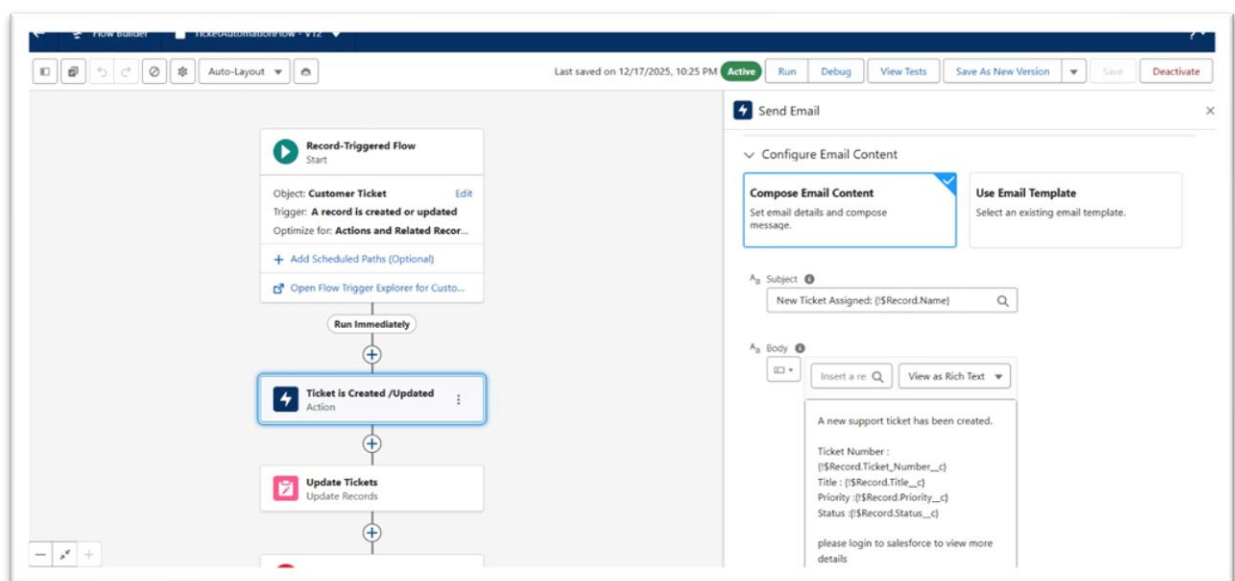
- Triggered automatically when a Customer Ticket is created or updated
- Recipient:
 - Assigned Support Agent (User)
- Email configuration is done dynamically inside the flow using **Compose Email**

Email Content Includes:

- Subject dynamically generated using record fields
 - Example: *New Ticket Assigned: {Ticket Name}*
- Email body contains:
 - Ticket Number
 - Title
 - Priority
 - Status
 - Direct reference to the ticket record

Advantage:

Compose Email allows real-time insertion of record values and avoids dependency on static email templates, making notifications more flexible and context-aware.



3. Apex-Based Email Notifications

For scenarios requiring advanced logic and conditional handling, **Apex-based email notifications** were implemented.

- Emails are triggered when:
 - A ticket is created
 - A ticket is updated or escalated
- Notifications can be sent to:
 - Customers (ticket status or resolution updates)
 - Support Agents (assignment or escalation alerts)

Email Details Include:

- Ticket Number
- Current Status
- Priority
- Assigned Agent

Apex provides greater control over email timing, recipients, and conditions compared to declarative automation alone.

4. Access Control: Profiles, Roles, and Sharing

Proper access management was established to ensure data security and visibility.

a) Role Hierarchy

The following role structure was defined:

- Support Manager
- Support Agent
- Customer

This hierarchy enables managers to view and oversee tickets handled by their team.

b) Profiles

Support Manager Profile

- Full access to Customer Tickets, Accounts, and Contacts
- Ability to approve, reassign, and escalate tickets

- Access to dashboards and analytical reports

Support Agent Profile

- Create, read, and update access to assigned tickets
- Read-only access to Accounts and Contacts

c) Sharing Settings

- Customer Ticket object sharing set to **Private**
- Role hierarchy allows Support Managers to view tickets owned by their subordinate agents
- Ensures confidentiality while maintaining managerial oversight

Benefits of Automation in Phase 4

- Faster ticket assignment and processing
- Reduced manual workload for agents
- Real-time notifications improve response times
- Secure, role-based access control