PHASE 4 :

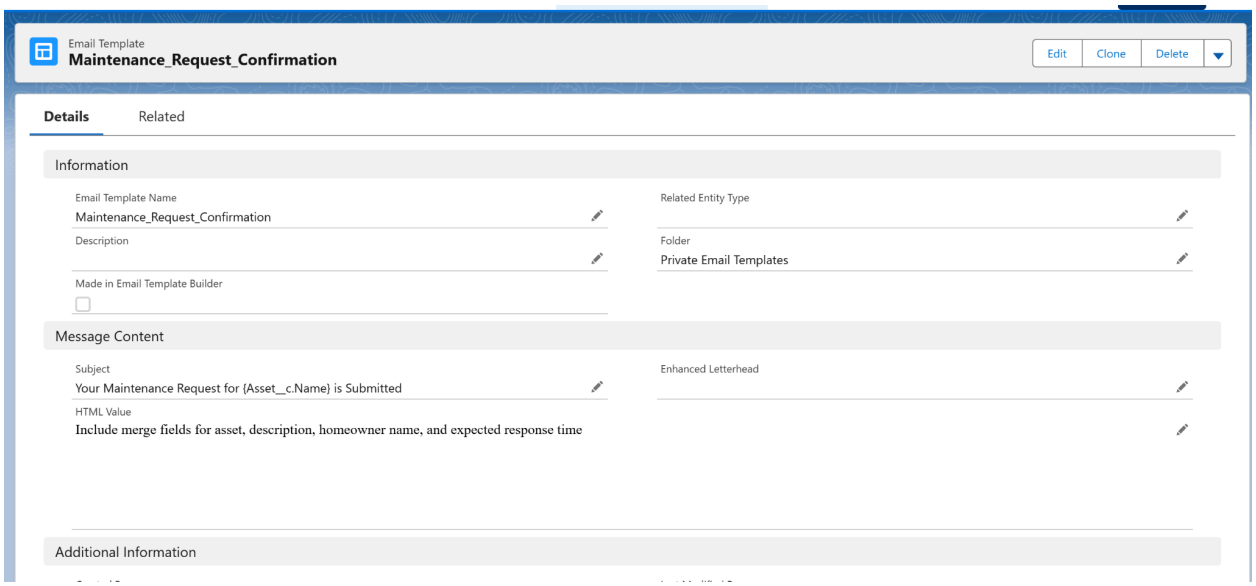
PROCESS AUTOMATION

(Home Maintenance Repair Management System)

1. Email Templates & Email Alerts

Purpose: Automate communication with homeowners and maintenance teams.

- Email Template: Maintenance_Request_Confirmation
  - Subject: “Your Maintenance Request for {!Asset__c.Name} is Submitted”
  - Body: Confirms receipt, provides asset details (Asset Name, Location, Request Description), and the expected response timeline.

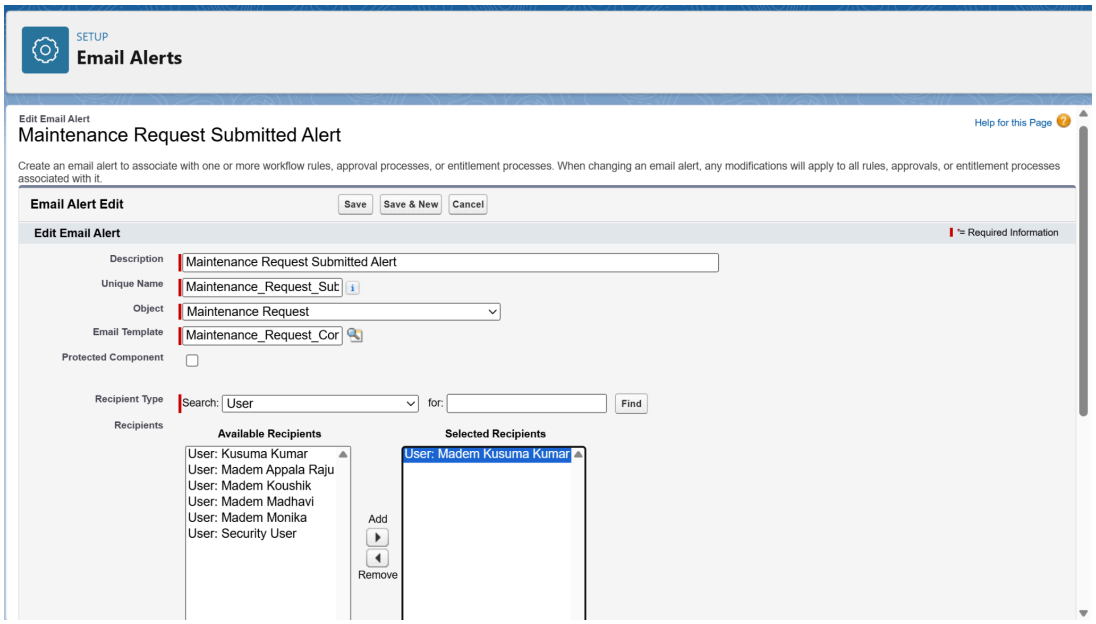


Email Alert: Maintenance Request Submitted Alert

- Object: Maintenance_Request__c
- Recipient: Homeowner (Contact lookup)
- Template: Maintenance_Request_Confirmation

Result: Homeowner automatically receives an email upon submitting a maintenance request.

Email Alert :

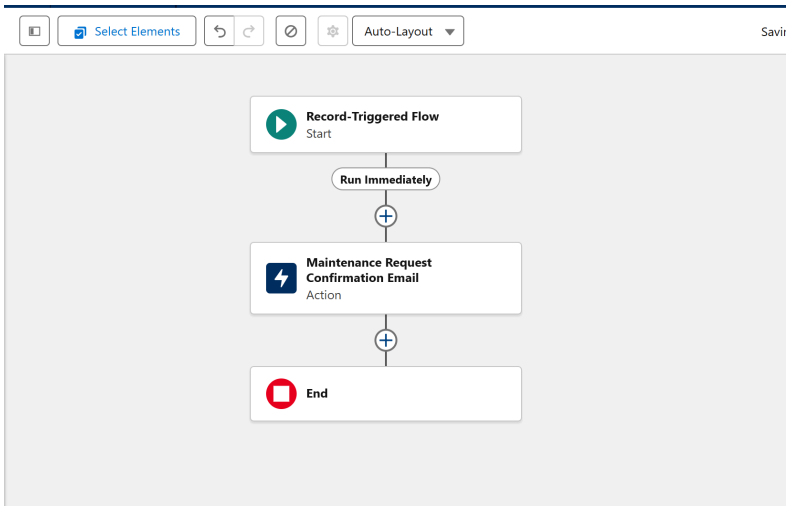


2. Record-Triggered Flow – Maintenance Request Confirmation

Purpose: Send confirmation email after a maintenance request is created.

- Flow Type: Record-Triggered Flow
- Object: Maintenance_Request__c
- Trigger: When a record is created
- Element: Action → Send Email Alert (Maintenance Request Submitted Alert)

Outcome: Home owner receives a confirmation email instantly after submitting their request.

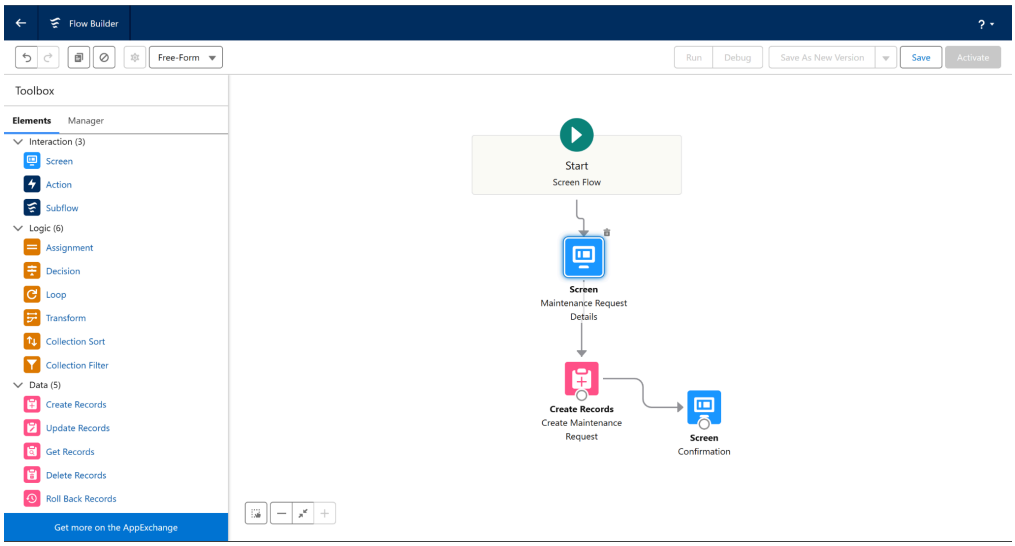


3. Screen Flow – Self-service Maintenance Request

Purpose: Provide a guided interface for homeowners or managers to log maintenance requests.

- Flow Type: Screen Flow
- Flow Elements: Request details (Asset, Description, Priority, Date), validations, review screen

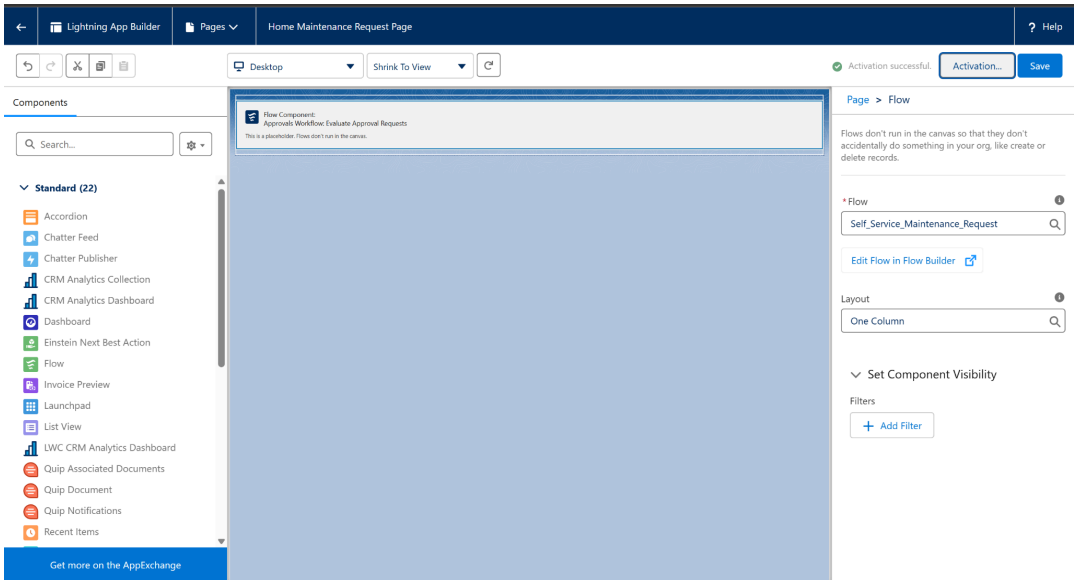
Outcome: Users can easily submit requests via an intuitive screen, reducing errors and improving experience.



4. Scheduled Flow – Maintenance Reminder

Purpose: Remind maintenance teams of upcoming critical requests.

- Flow Type: Scheduled-Triggered Flow
- Criteria: Maintenance_Request__c.Status = "Scheduled" AND Start_Date__c = TODAY() + 1
- Outcome: Maintenance team receives reminders one day before scheduled maintenance.



5. Approval Process – High-Cost Maintenance Approval

Purpose: Ensure managerial oversight for expensive repair jobs.

- Criteria: Maintenance_Request__c.Estimated_Cost__c ≥ ₹1,00,000 AND Status = Submitted
- Outcome: High-cost repairs require management approval before proceeding.

6. Tasks Automation – Preparation Reminders

Purpose: Help maintenance teams or vendors prepare for assigned work.

- Flow Type: Record-Triggered Flow on Maintenance_Request__c (after Status = Scheduled)
- Action: Create Task for assigned maintenance team member with subject “Prepare for Maintenance: {Asset Name}” scheduled one day before start date.

Outcome: Assigned staff receive actionable reminders for job preparation.

7. Custom Notifications (In-App Alerts)

Purpose: Provide instant alerts in Salesforce when urgent action is needed.

- Notification Type: Maintenance_Notice (Desktop + Mobile)
- Trigger: When Asset reaches max open requests (capacity full)

- Recipient: Maintenance manager and assigned team

Outcome: Instantly notifies staff if more requests are opened than what Asset can handle, for quick intervention.

OUTCOME OF PHASE 4

- Automated data validation, reducing human error.
- Streamlined communications to homeowners, teams, and vendors via emails and scheduled reminders.
- Enabled self-service for maintenance request entry, improving usability.
- Strengthened governance for costly repairs through approval flows.
- Enhanced task management and preparation with automated reminders.
- Instant notifications for capacity issues, ensuring rapid resolution.

With these steps, your Home Maintenance Repair Management System becomes robust, efficient, and ready for advanced Apex automation in the next development phase.

TESTING