

SMART SLA TRACKER: INTELLIGENT CUSTOMER COMPLAINT & ESCALATION MANAGEMENT

Phase 4: Process Automation (Admin).

4.1 Validation Rules:

1. Create the Resolution Field:

Setup > Object Manager > Case > Fields & Relationships > New > Resolution

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Case Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Links', 'Record Types', 'Related Lookup Filters', 'Search Layouts', and 'List View Button Layout'. The main content area is titled 'Case' and 'Resolution'. It includes a 'Custom Field Definition Detail' section with fields for 'Field Label', 'Field Name', 'API Name', 'Description', 'Help Text', 'Data Owner', 'Field Usage', 'Data Accessibility Level', and 'Compliance Categorization'. The 'Field Name' is set to 'Resolution', 'API Name' is 'Resolution__c', and 'Object Name' is 'Case'. The 'Data Type' is 'Long Text Area'. The 'Created By' is 'Laravanya Depalreddy' on '9/1/2025, 12:26 PM'. The 'Modified By' is also 'Laravanya Depalreddy' on '9/1/2025, 12:26 PM'. There are also 'General Options' and 'Long Text Area Options' sections.

2. Create the Validation Rule:

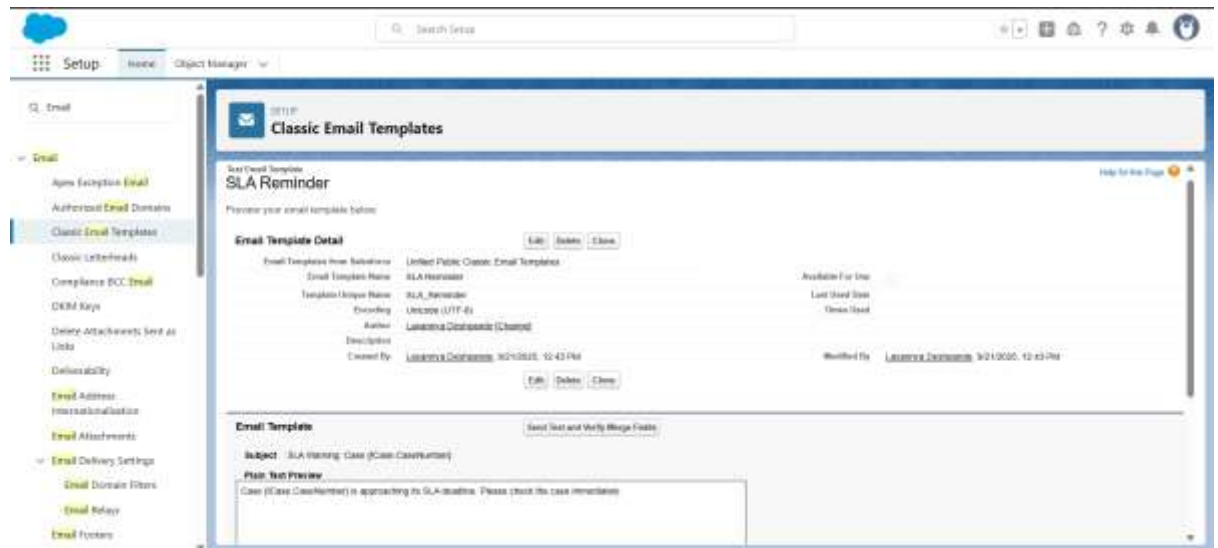
Setup > Object Manager > Case Validation Rules > New > Prevent_Close_Without_Resolution

The screenshot shows the Salesforce Setup interface for creating a new Case Validation Rule. The left sidebar is the same as the previous screenshot. The main content area is titled 'Case Validation Rule'. It includes a 'Validation Rule Detail' section with fields for 'Rule Name', 'Error Condition Formula', 'Error Message', 'Error Location', and 'Created By'. The 'Rule Name' is 'Prevent_Close_Without_Resolution'. The 'Error Condition Formula' is 'AND(ISPICKLIST(Status, "Closed"), ISBLANK(Resolution__c))'. The 'Error Message' is 'You cannot close a case without providing a resolution'. The 'Error Location' is 'Resolution'. The 'Created By' is 'Laravanya Depalreddy' on '9/1/2025, 12:34 PM'. There are also 'Edit' and 'Close' buttons.

4.2 Flow Builder (Record-Triggered):

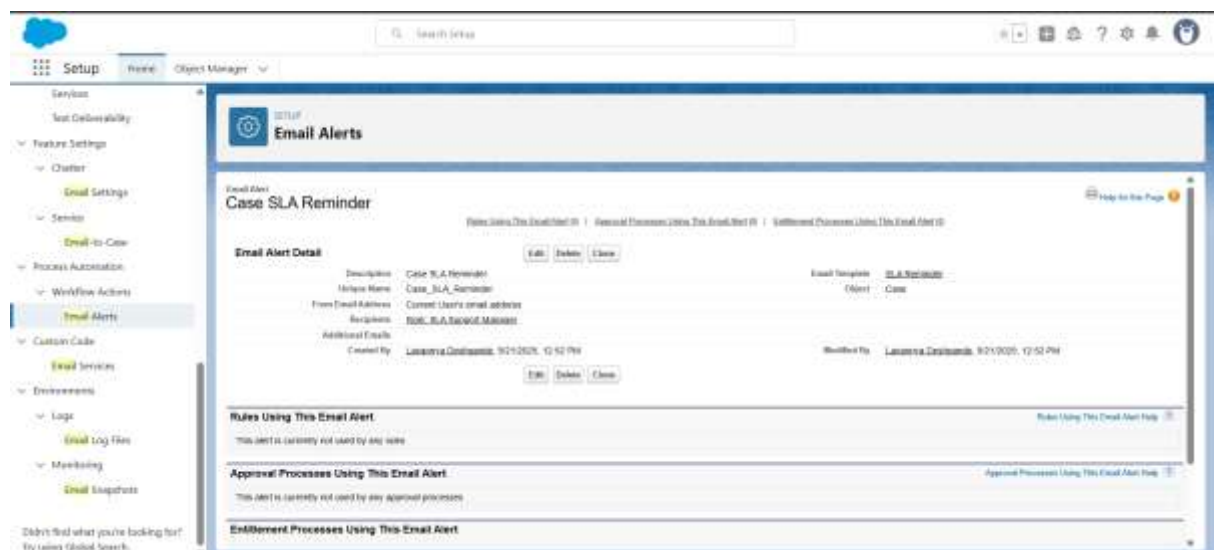
1. Create an Email Template:

Setup > Email > Classic Email Templates > New Template.



2. Create an Email Alert:

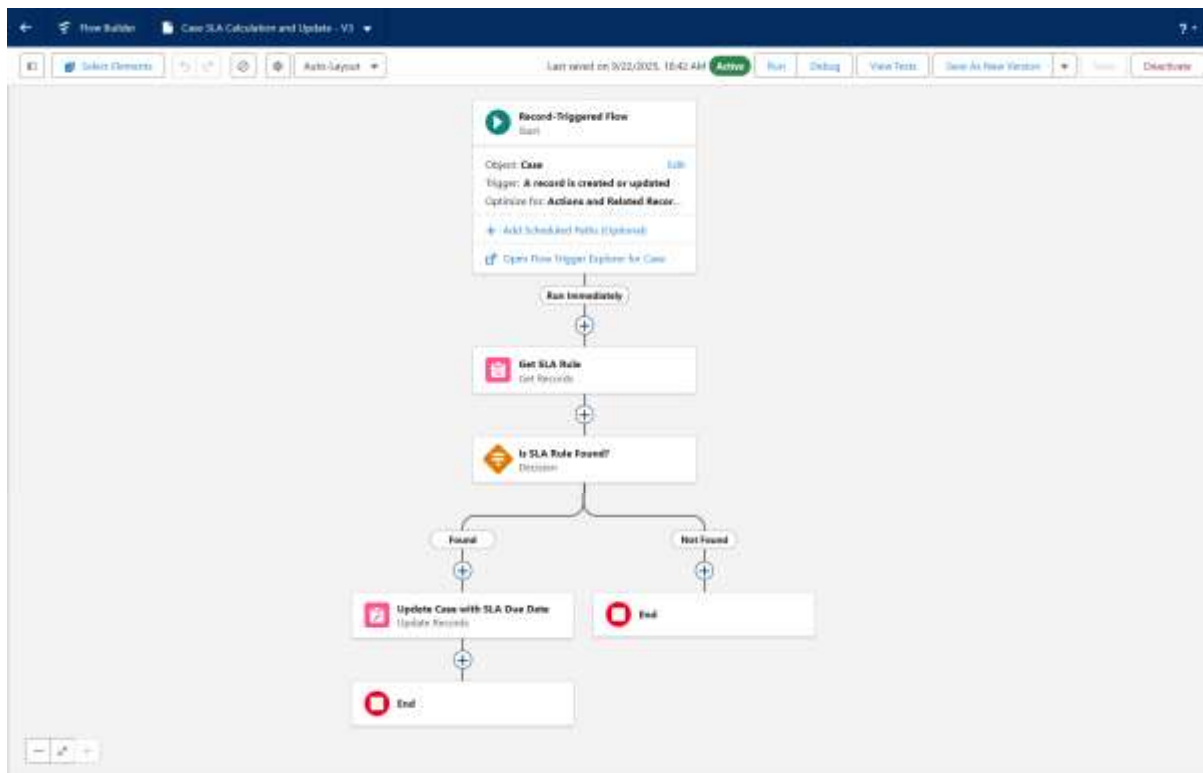
Setup > Email > Email Alerts > New



3. Build the Flow:
Setup > Flows > New Flow

Flow 1: The SLA Calculation Flow:
(Record-Triggered Flow)

- 1.1 Flow Setup
- 1.2 Add the Get Records Element
- 1.3 Add the Decision Element
- 1.4 Add the Update Records Element
- 1.5 Create a New Formula Resource
- 1.6 Save and Activate



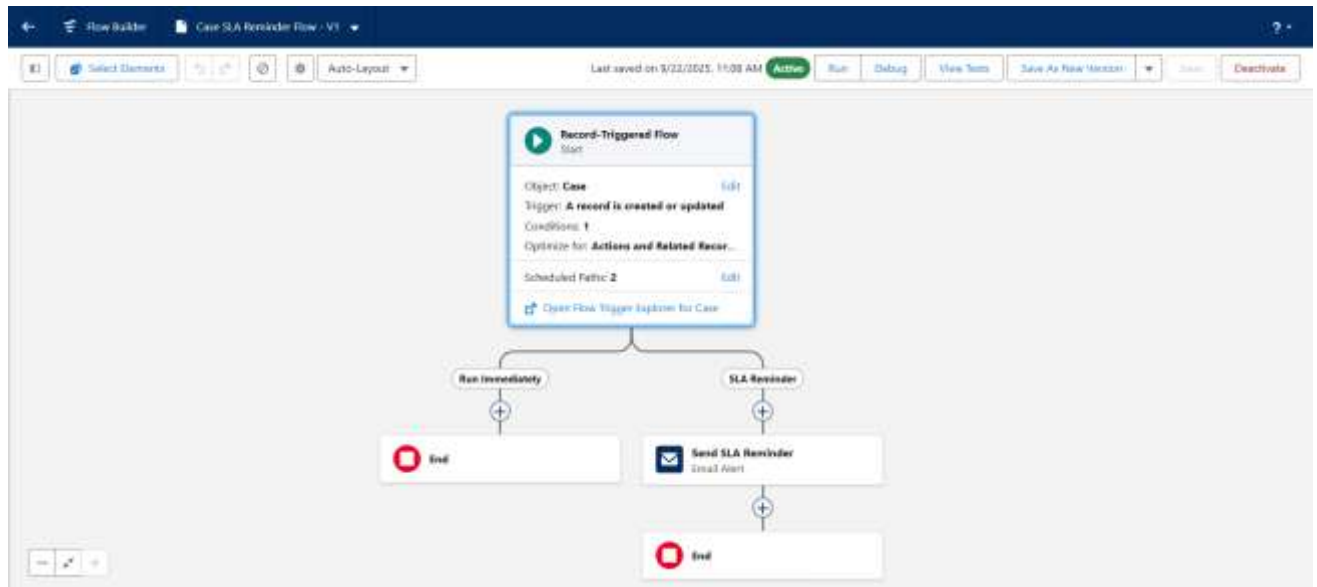
Flow 2: The SLA Reminder Flow

2.1 Flow Setup

2.2 Add a Scheduled Path

2.3 Add the Action

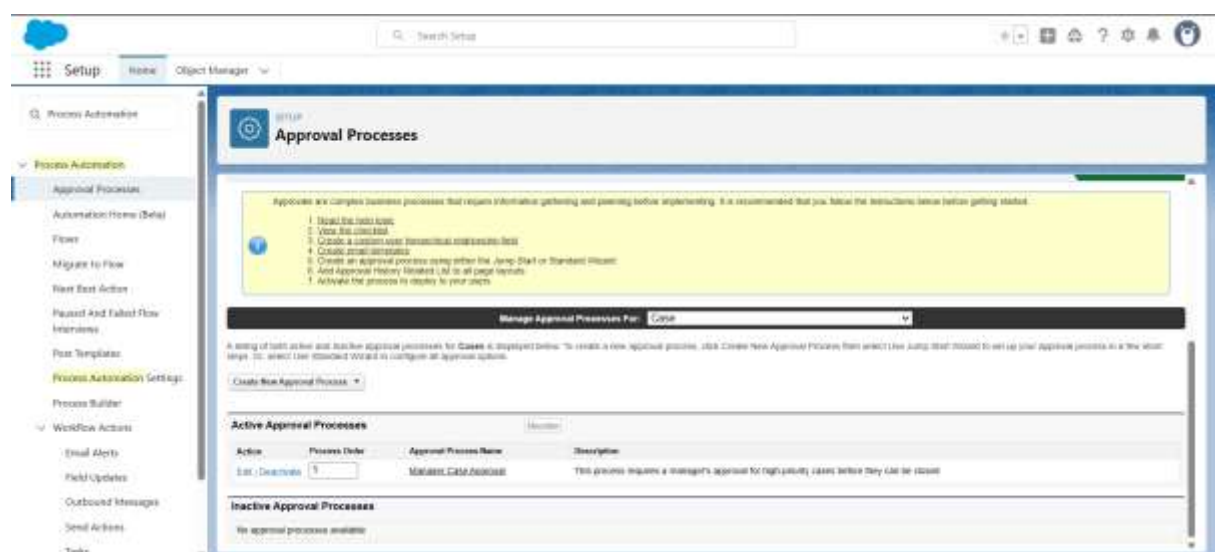
2.4 Save and Activate



4.3 Approval Process:

1. Create the Approval Process:

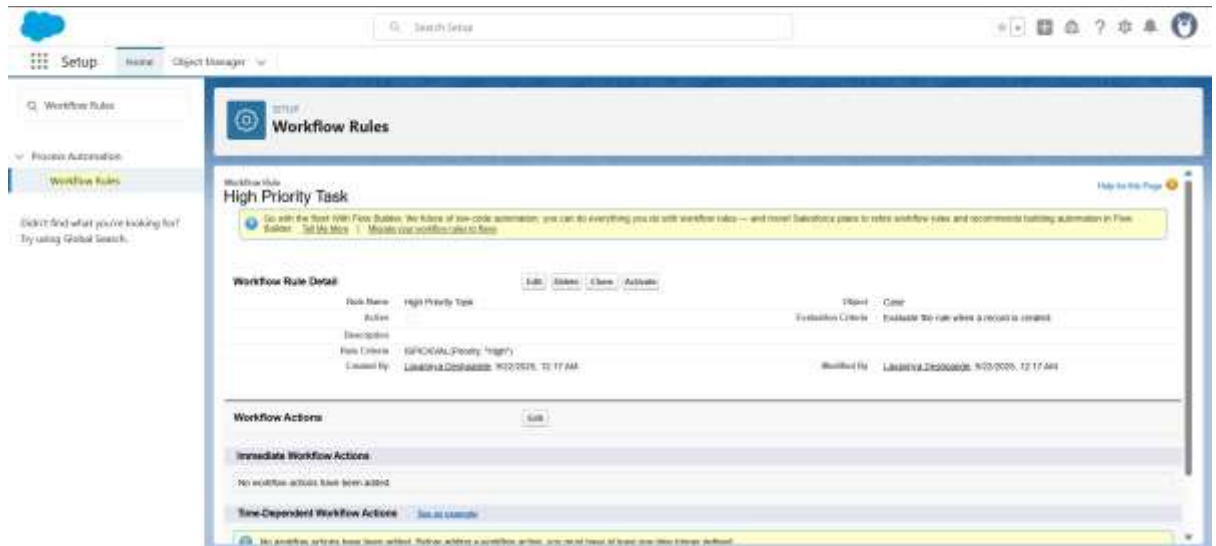
Setup → Process Automation → Approval Processes



4.4 Workflow Rules:

1. Create a Workflow Rule:

Setup → Process Automation → Workflow Rules.



2. Add a Workflow Action:

Add Workflow Action > New Task

