

Phase 4: Process Automation (Admin)

1. Validation Rules (Required)

A. *Complaint Date Cannot Be in the Future*

- **Setup Path:** Setup → Object Manager → Complaint → Validation Rules → New
- **Rule Name:** Complaint_Date_Not_In_Future
- **Error Condition Formula:**

```
Complaint_Date__c > TODAY()
```

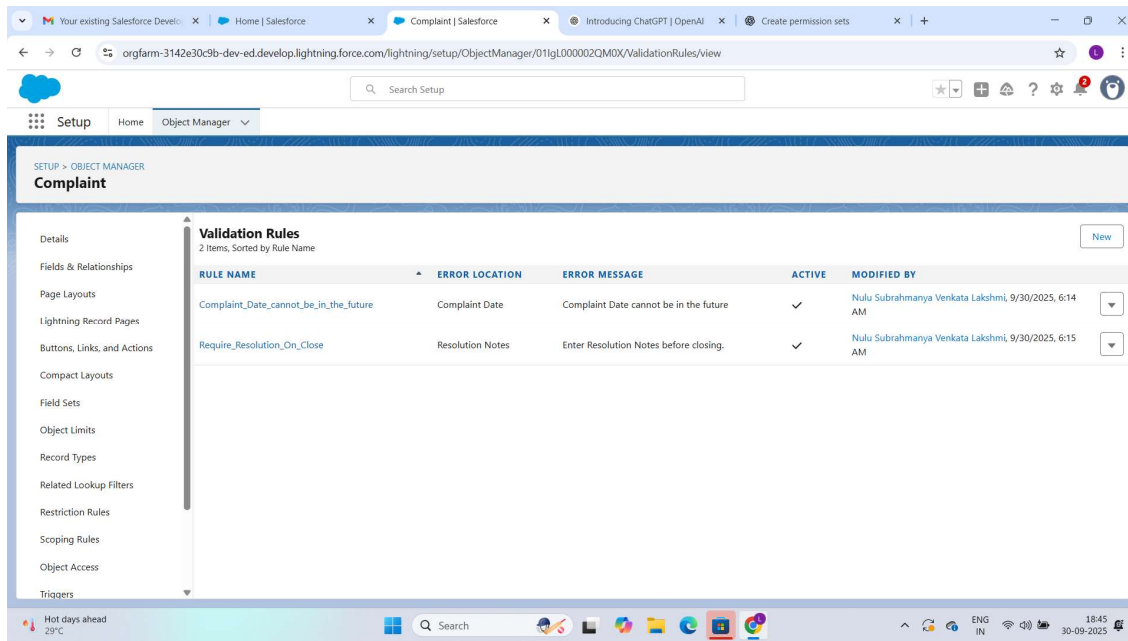
- **Error Message:** "Complaint Date cannot be in the future."
- **Error Location:** Field → Complaint Date
- **Action:** Save & Activate

B. *Resolution Notes Required When Status = Resolved/Closed*

- **Setup Path:** Setup → Object Manager → Complaint → Validation Rules → New
- **Rule Name:** Require_Resolution_On_Close
- **Error Condition Formula:**

```
AND(  
  OR(  
    ISPICKVAL(Status__c, "Resolved"),  
    ISPICKVAL(Status__c, "Closed")  
  ),  
  ISBLANK(Resolution_Notes__c)  
)
```

- **Error Message:** "Enter Resolution Notes before marking the complaint Resolved or Closed."
- **Error Location:** Field → Resolution Notes
- **Action:** Save & Activate



2. Record-Triggered Flow (Required)

Purpose: Automatically create a follow-up Task and send an email when a Complaint is created with Priority = High.

Steps to Create Flow:

1. Setup → Flows → New Flow → Record-Triggered Flow → Create
2. **Configure Start:**
 - Object: Complaint
 - Trigger: A record is created
 - Entry Condition: `Priority__c = "High"`
 - Run Flow: After the record is saved
3. **Get Assigned User Record (Optional but Required for Email)**
 - Element → Get Records → Label: `Get_Assigned_User`
 - Object: User
 - Condition: `Id = {!$Record.OwnerId}`
 - Get Only the First Record
4. **Create Task Record**
 - Element → Create Records → Label: `Create_Followup_Task`
 - Object: Task
 - Field Values:
 - `Subject = Follow up: {!$Record.Name}`
 - `WhatId = {!$Record.Id}`
 - `OwnerId = {!$Record.OwnerId}`
 - `Status = Not Started`

- Description=Auto task created for high priority complaint. Complaint: {!\$Record.Complaint_Desc__c}

5. Send Email to Assigned Agent

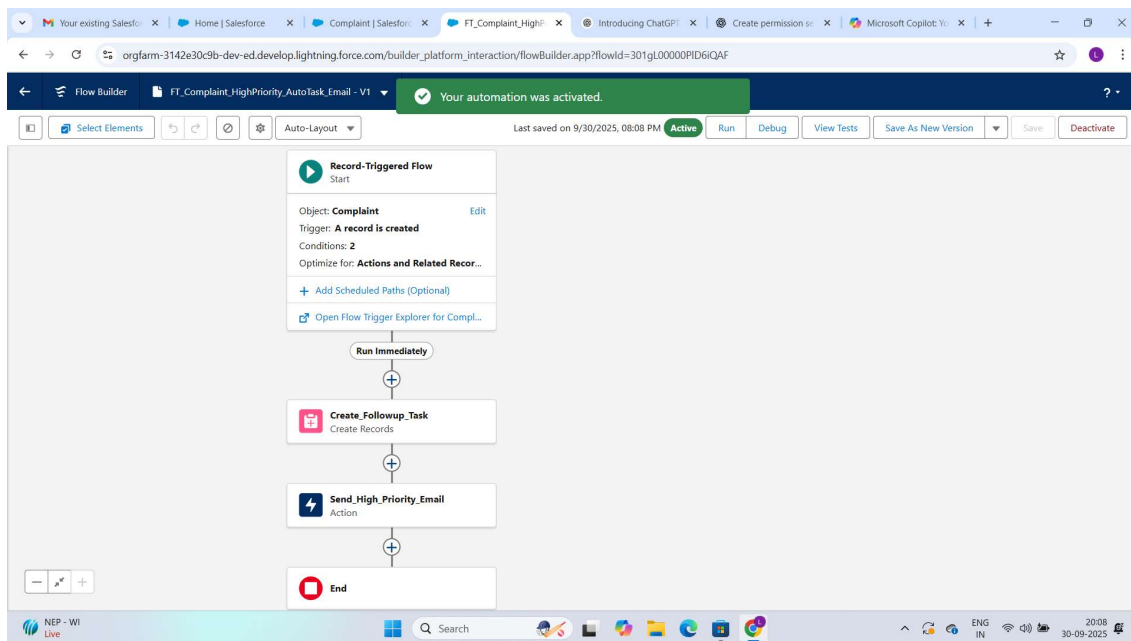
- Element → Action → Search Send Email → Select
- To Addresses: {!Get_Assigned_User.Email}
- Subject: High Priority Complaint Assigned: {!\$Record.Name}
- Body:

A complaint with Priority = High was created and assigned to you.
 Complaint: {!\$Record.Name}
 Customer: {!\$Record.Customer__r.Name}
 Description: {!\$Record.Complaint_Desc__c}

6. Connect Elements: Start → Get_Assigned_User → Create_Followup_Task → Send_High_Priority_Email → End

7. Save & Activate Flow

- Name: FT_Complaint_HighPriority_AutoTask_Email



3. Approval Process (Required)

Purpose: Require Manager approval for complaints with Priority = Urgent.

Steps to Create Approval Process:

1. **Setup → Process Automation → Approval Processes → Create New Approval Process → Use Standard Setup Wizard**
2. **Select Object:** Complaint
3. **Name:** Urgent_Complaint_Approval
4. **Entry Criteria:**
 - Priority__c = "Urgent"
5. **Initial Submitters:**
 - Record Owners and their delegates
6. **Approver Field/Method:**
 - Automatically assign → Related User → Record Owner's Manager OR Role = Manager
7. **Define Approval Steps:**
 - Step 1 Approver: Manager role or Record Owner's Manager
8. **Final Approval Actions:**
 - Field Update → Status__c = Approved
9. **Final Rejection Actions:**
 - Field Update → Status__c = Rejected
10. **Activate the Approval Process**

The screenshot shows the Salesforce Setup interface for the 'Urgent_Complaint_Approval' approval process. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Approval Processes' section with the following details:

- Process Definition Detail:**
 - Process Name: Urgent_Complaint_Approval
 - Unique Name: Urgent_Complaint_Approval
 - Description: Complaint: Priority EQUALS Urgent
 - Entry Criteria: Complaint: Priority EQUALS Urgent
 - Record Editability: Administrator ONLY
 - Approval Assignment Email Template: Complaint Owner, User: Sarah Manager, User: John Agent
 - Initial Submitters: Nulu Subrahmanya Venkata Lakshmi
 - Created By: Nulu Subrahmanya Venkata Lakshmi
 - Modified By: Nulu Subrahmanya Venkata Lakshmi
- Initial Submission Actions:**
 - Action Type: Record Lock
 - Description: Lock the record from being edited