BRD (Business Requirements Document):

This project implements a Smart City Issue Tracking system within Salesforce using standard configuration tools. Instead of using a public portal, cases are created internally by an administrator using record types for new or reopened issues. The system ensures proper routing, status tracking using assignment rules, validation rules, workflows, and dashboards.

Objective:

The objective of this project is to build a centralized issue tracking system within Salesforce, where admins create cases internally based on reported civic problems. The system automatically routes cases to the correct departments, sends status updates via email, and supports reopening of cases after a defined period. It aims to improve transparency, accountability and service quality using standard Salesforce automation.

Components:

- Standard Case Object
- Customized page layout
- Assignment Rules
- Workflows
- Report type
- Validation rules
- Email Alerts
- Custom fields
- Queues
- Permission Sets
- Reports and Dashboards

Custom Fields Created in Case:

Field Name	Data type	Use
Issue Type	Picklist	Pothole, Garbage, etc.
Location	Text	Where issue is present
Urgency	Picklist	High, Medium, Low
Attachment	URL	Proof
Citizen Contact	Phone	For communication

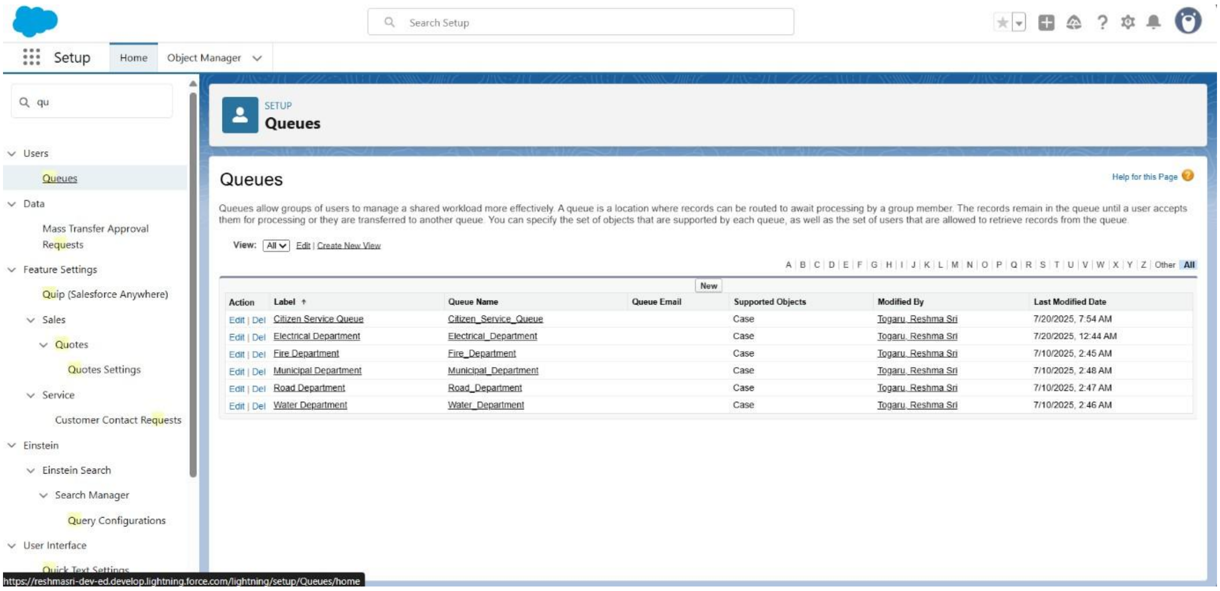
Reopen form	Lookup (case)	For reopening case
Citizen email	email	For acknowledgement
Citizen name	text	To address him in the mail
Description	Long text area	For additional details

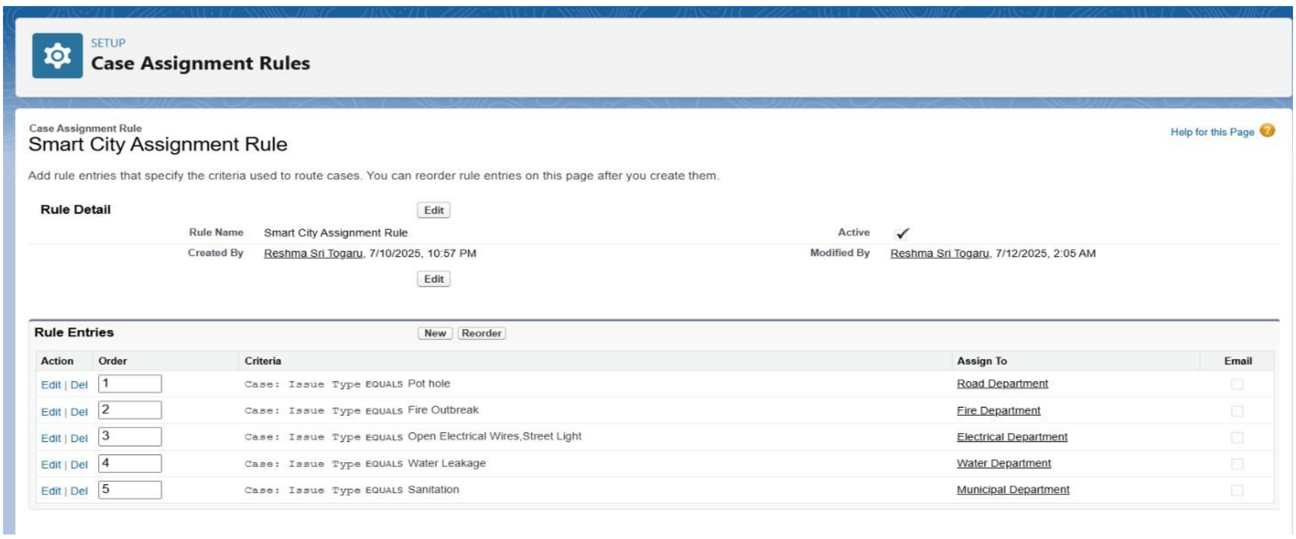
Admin:

* Collects citizen inputs (Name, Email, Issue)
* Creates Case
* Triggers Email response
* Reopen the case

Assignment Rules:

* Pothole →Roads Department
* Streetlight → Electrical Department
* Sanitation → Municipal Department
* Fire Outbreak → Fire Department
* Drainage issues→ Municipal Department
* Water leakage→ Water department
* Open electrical wires→ Electrical Department
* Stray dogs→ Municipal department





Functionalities Implemented:

* Assignment rules by issue type

* Developed a reopen case as well

* Admin creates new or reopen case from Case tab

* Record Types used to separate New and Reopen issues

* Assignment Rules route cases to correct department

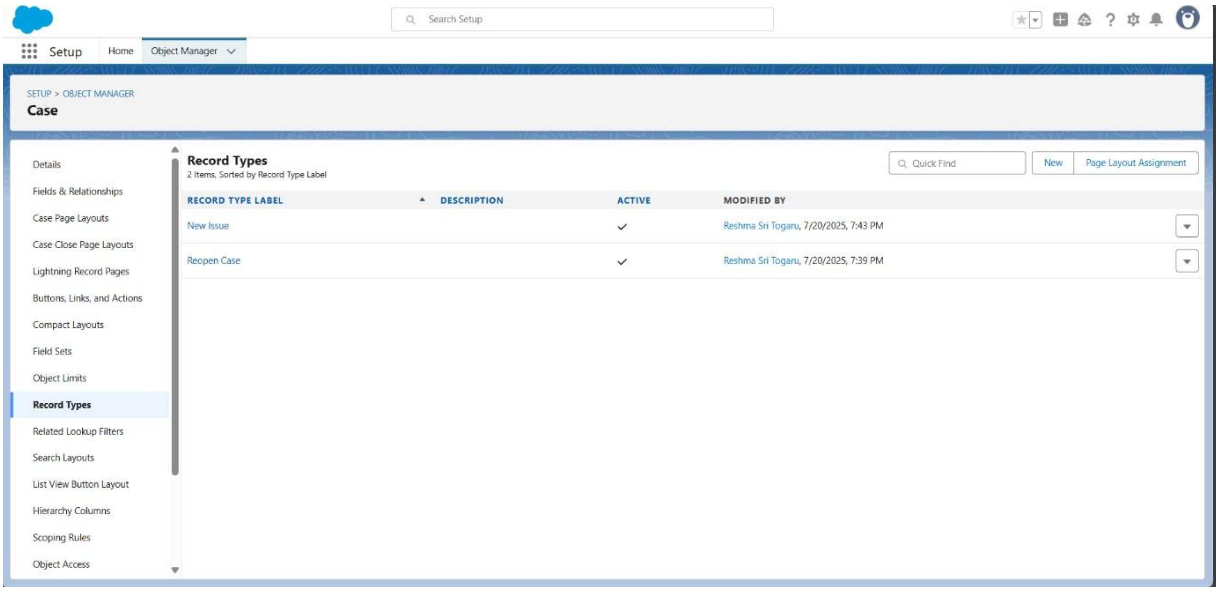
* Email alerts sent automatically based on case status

* Validation Rule restricts reopening before 7 days

* Dashboards track department performance

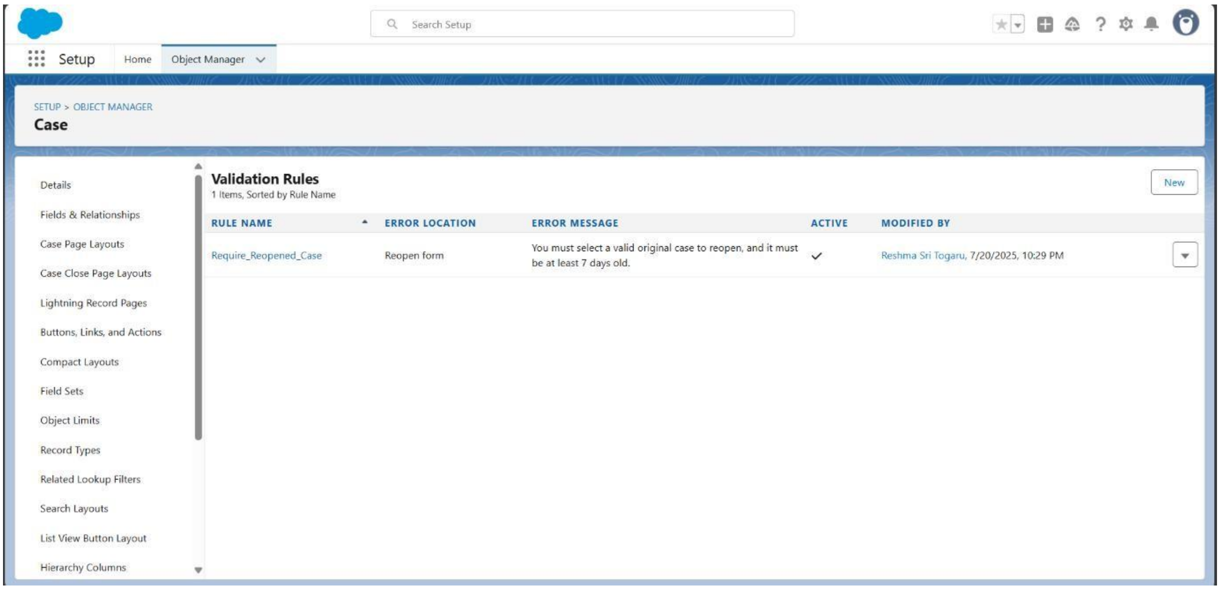
When admin creates a new case, Salesforce prompts them to choose a **Record Type**. This allows the system to distinguish between a **New Issue** and a **Reopen Request**. Based on the selected record type, different page layouts and validation logic are applied.

- **New Issue**: Standard form for entering fresh complaints.
- **Reopen Case**: Triggers a validation rule to ensure the issue is eligible for reopening (after 7 days of closure).



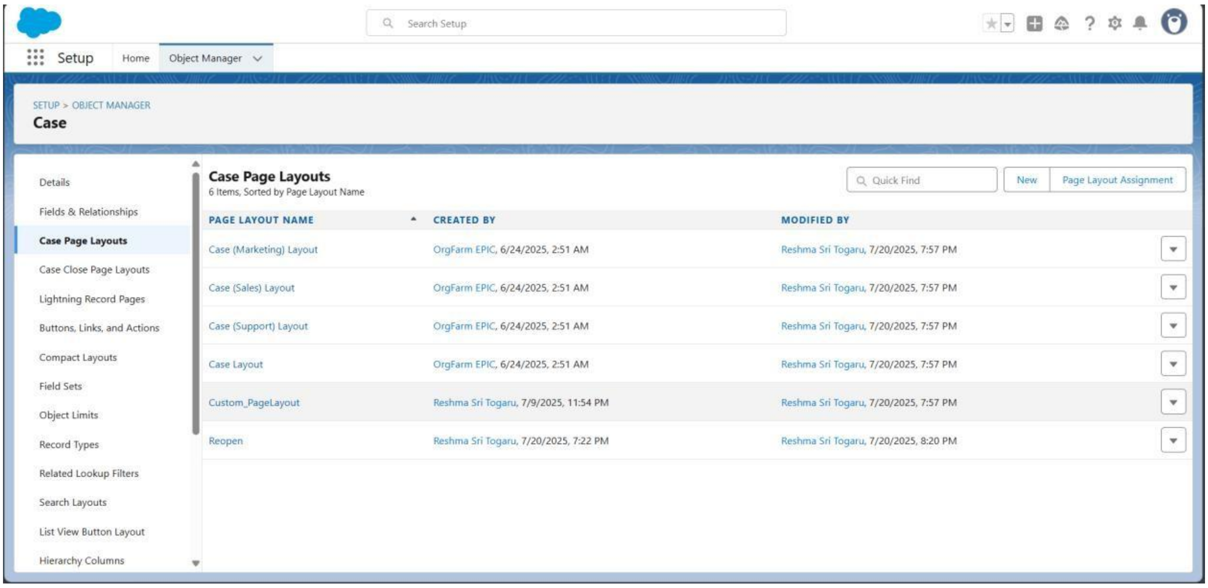
Validation rule:

when an admin selects the **Reopen Issue** record type. It prevents the case from being reopened if it was closed less than 7 days ago.



Page Layout for Record Type: new issue and reopen case

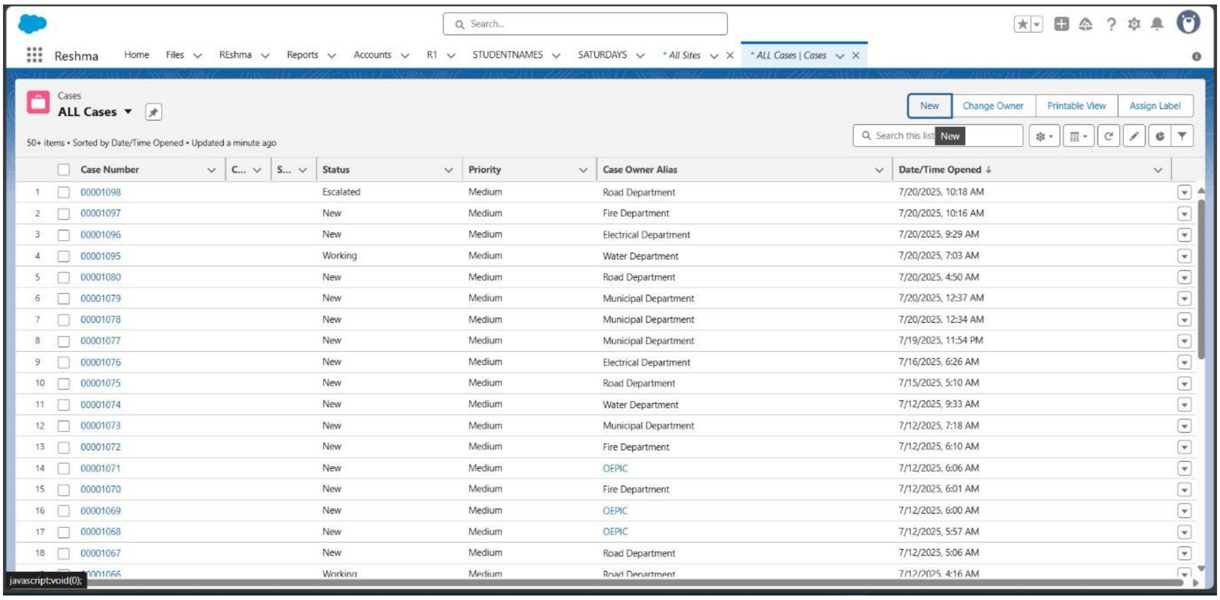
We created 2 page layouts for new issue and reopen case



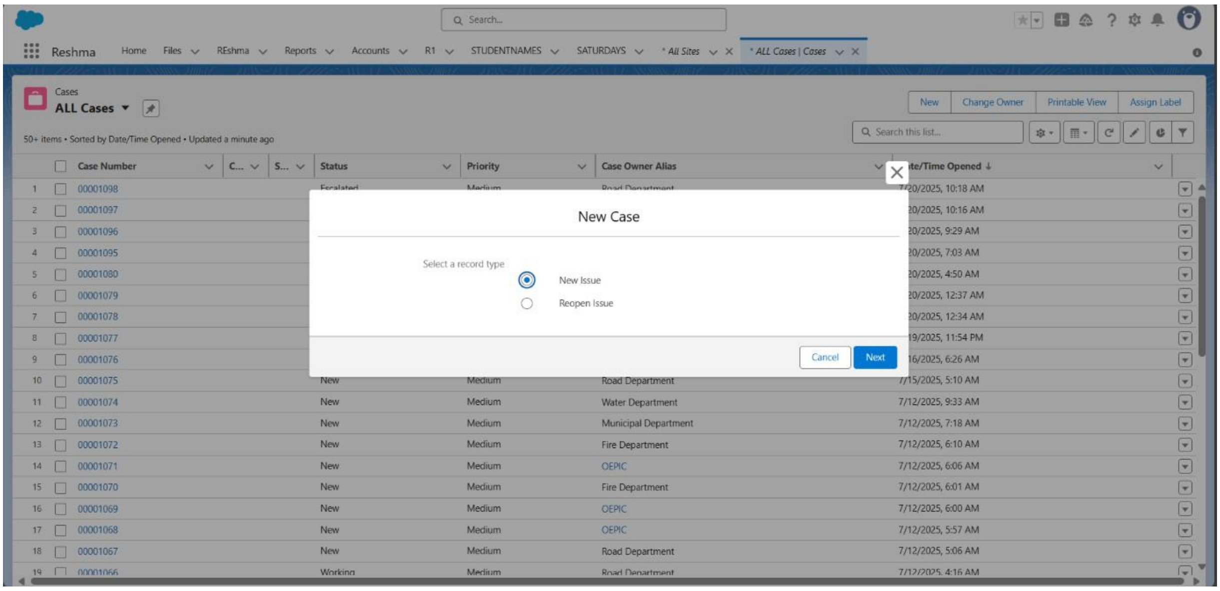
*New Case Creation (Record Type: New Issue)

How admin selects "New Issue" and fills the form

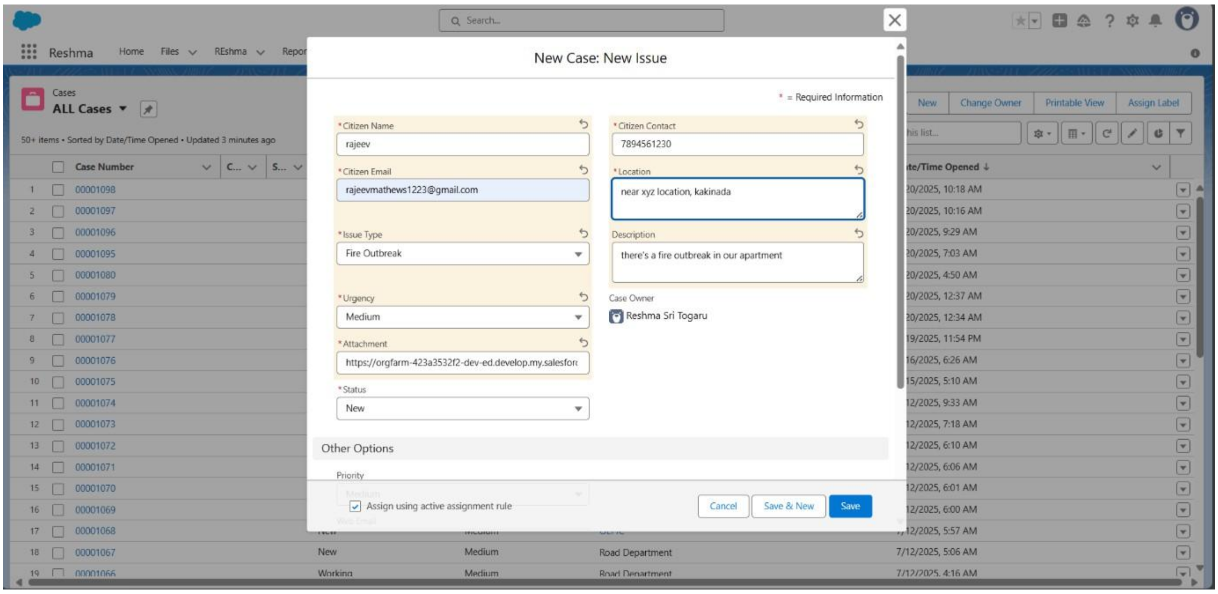
Admin creates the case by clicking on the new button here.



After that it'll offers two options: New Issue, Reopen Existing Case



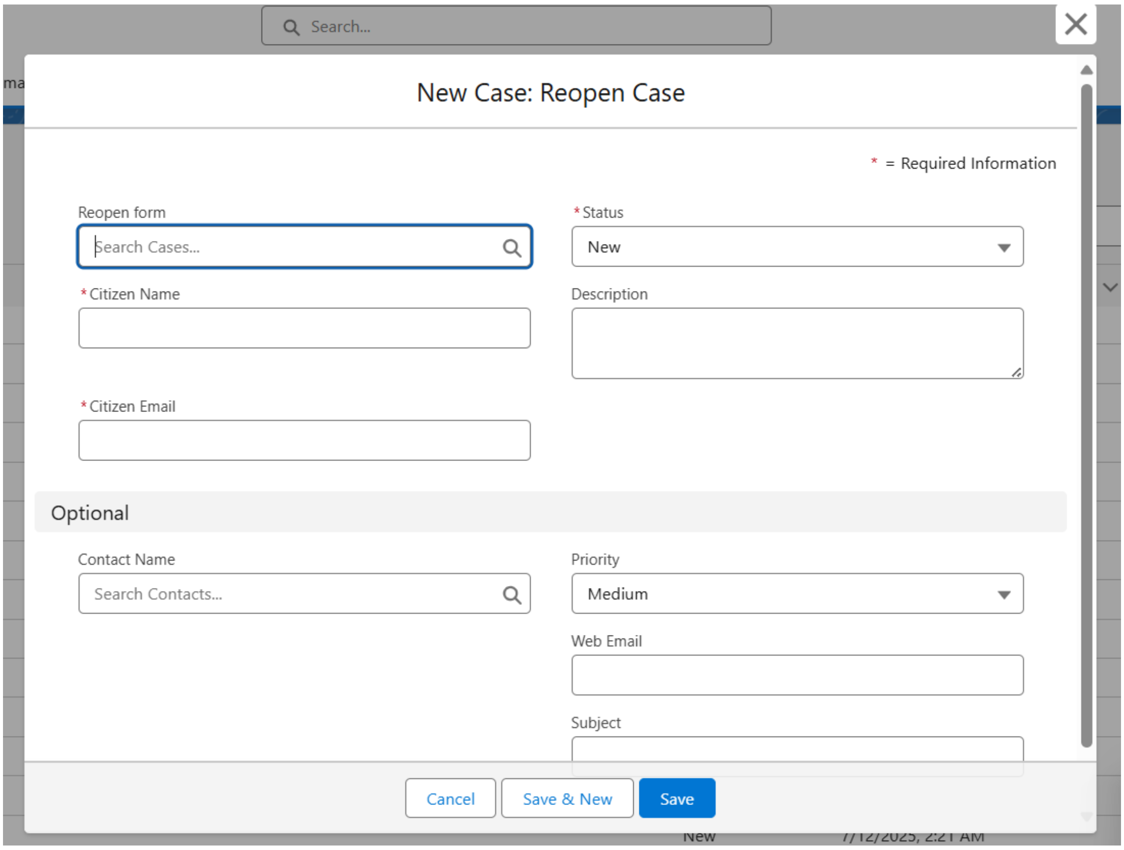
*After clicking "New Case" he has to fill out the form.



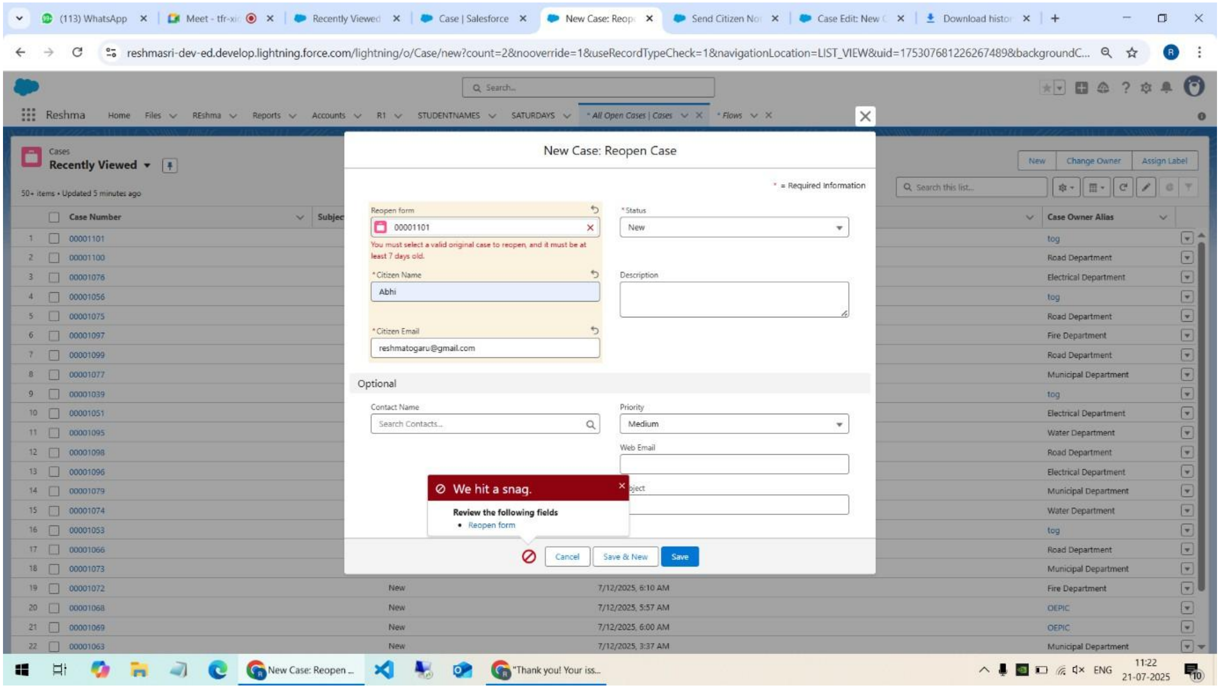
When save is clicked the case is saved automatically.

When reopen case is clicked:

If the user chooses **Reopen Existing Case**, they are shown a minimal form where they enter their previously entered fields. If the case is eligible (i.e., more than 7 days since closure), the case is reopened and assigned for follow-up.



So when the case gets reopened before 7 day of closure an error message is displayed

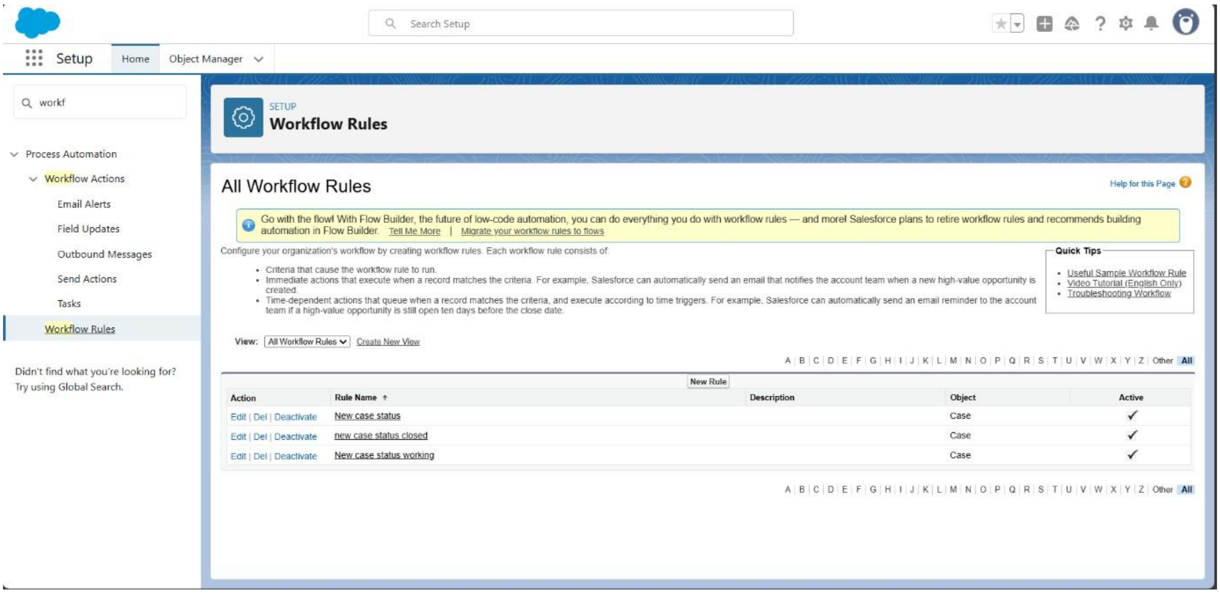


For an email to be triggered there are 3 steps, as:

*Creating the **Email template**

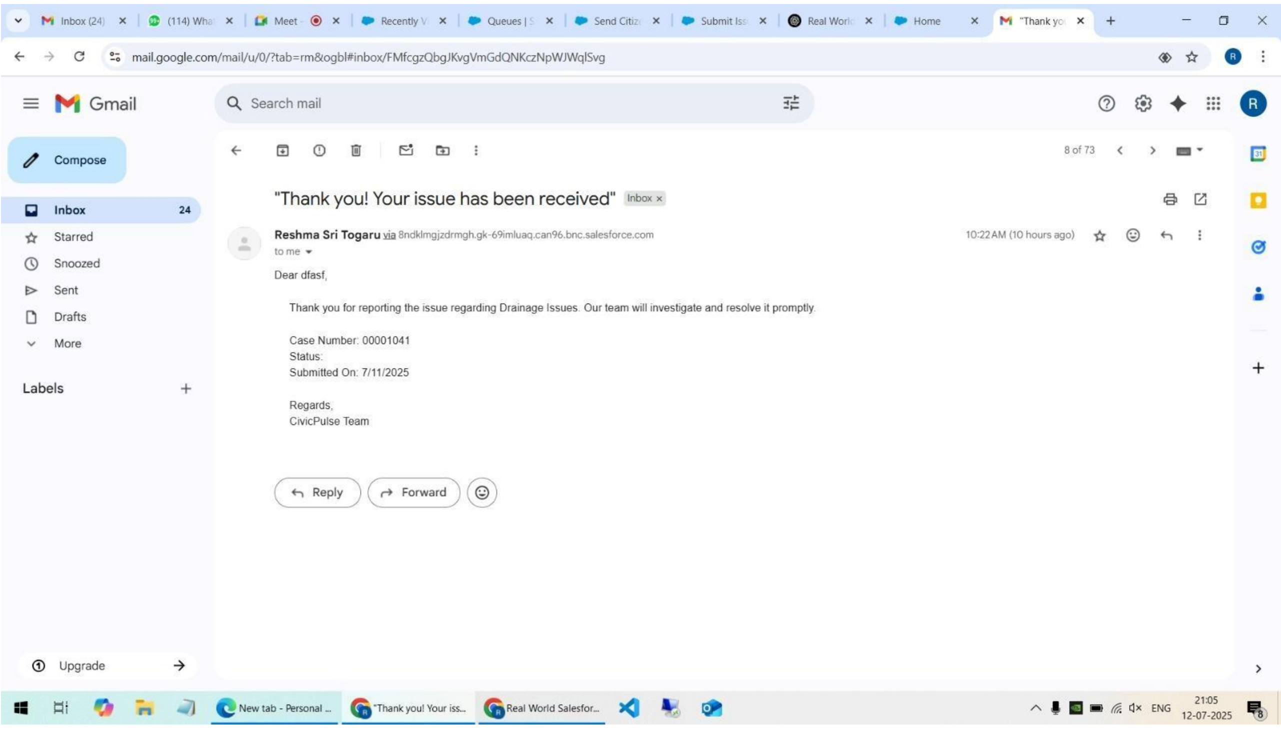
***Email alerts** to automatically send the email

***Workflows for email**- When a record matches the criteria. Salesforce can automatically send an email that notifies the account

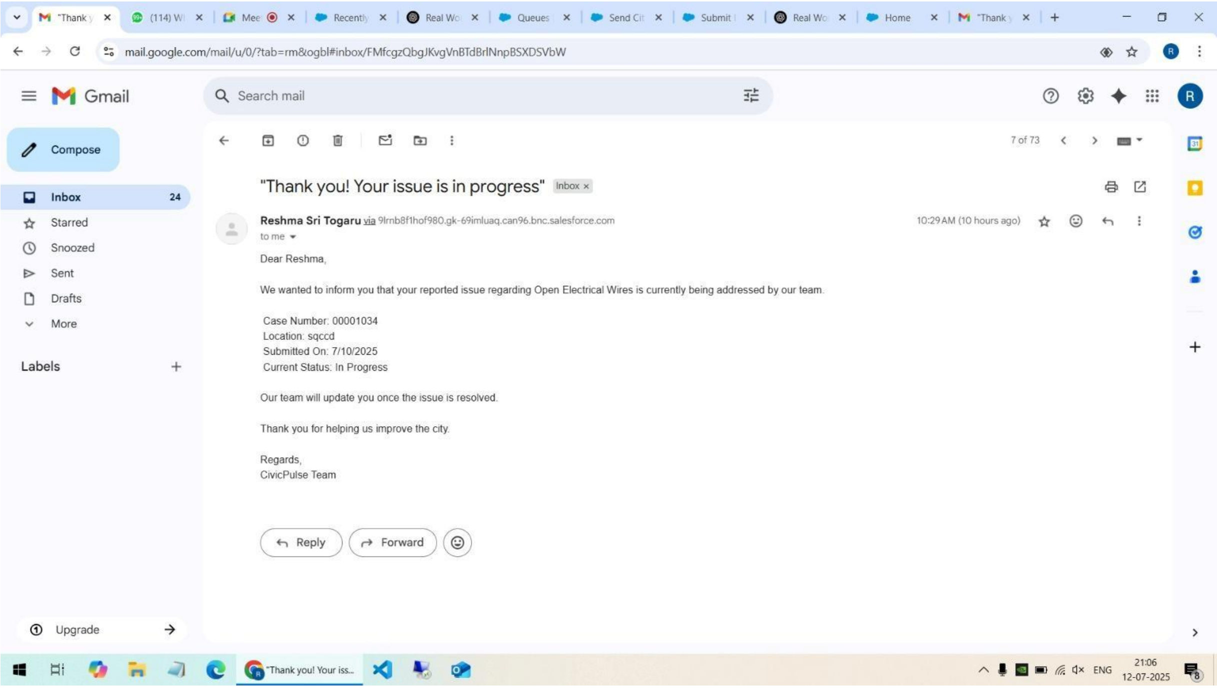


Testing on Email Notifications:

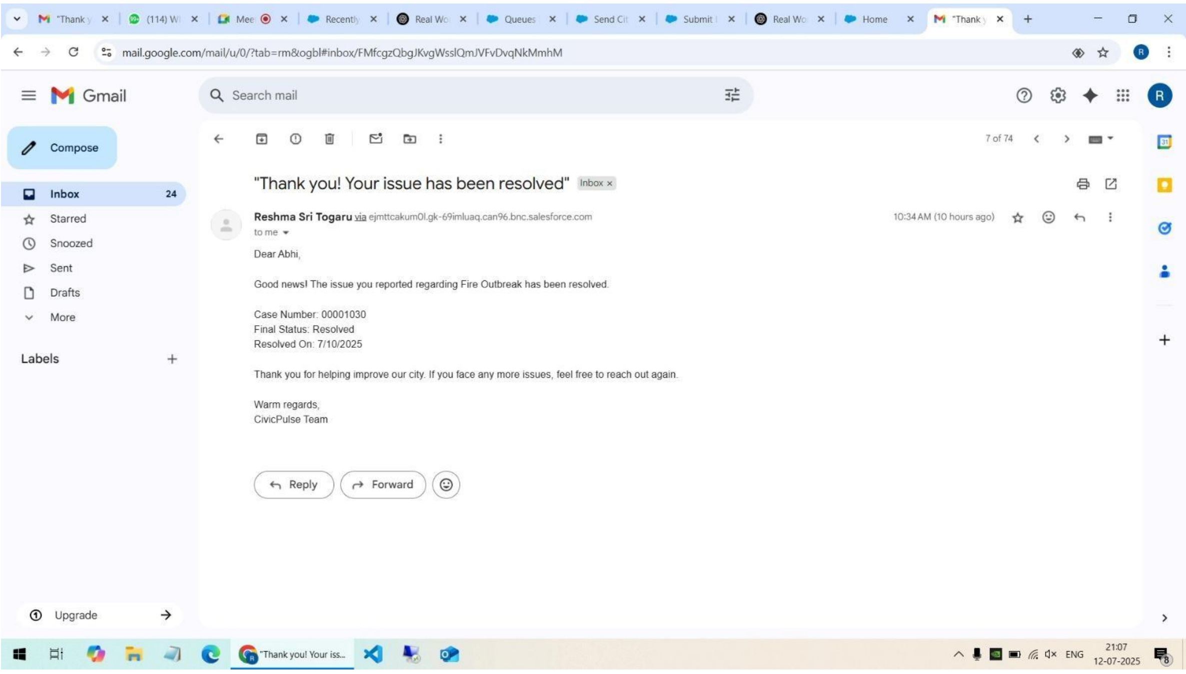
TC1: Email on case being received



TC2: Email on case In Progress



TC3: Email on case which has been Resolved



Reports & Dashboards: