

## **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

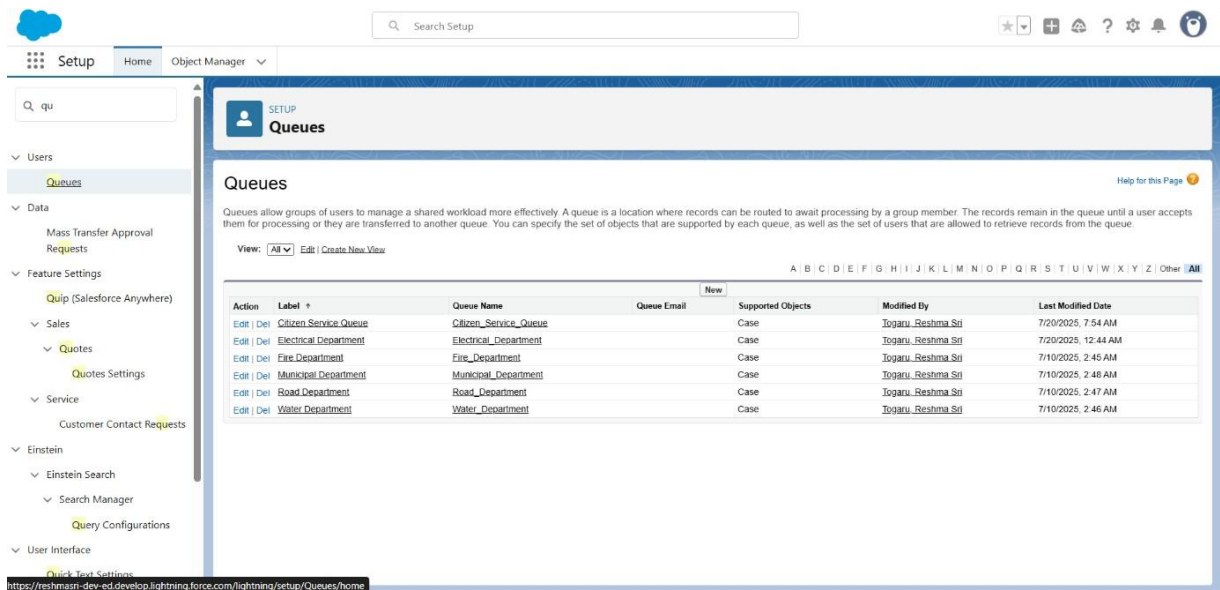
Reopen form	Lookup (case)	For reopening case
Citizen email	email	For acknowledgement
Citizen name	text	To address him in the mail
Description	Long text area	For additional details

### **Admin:**

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

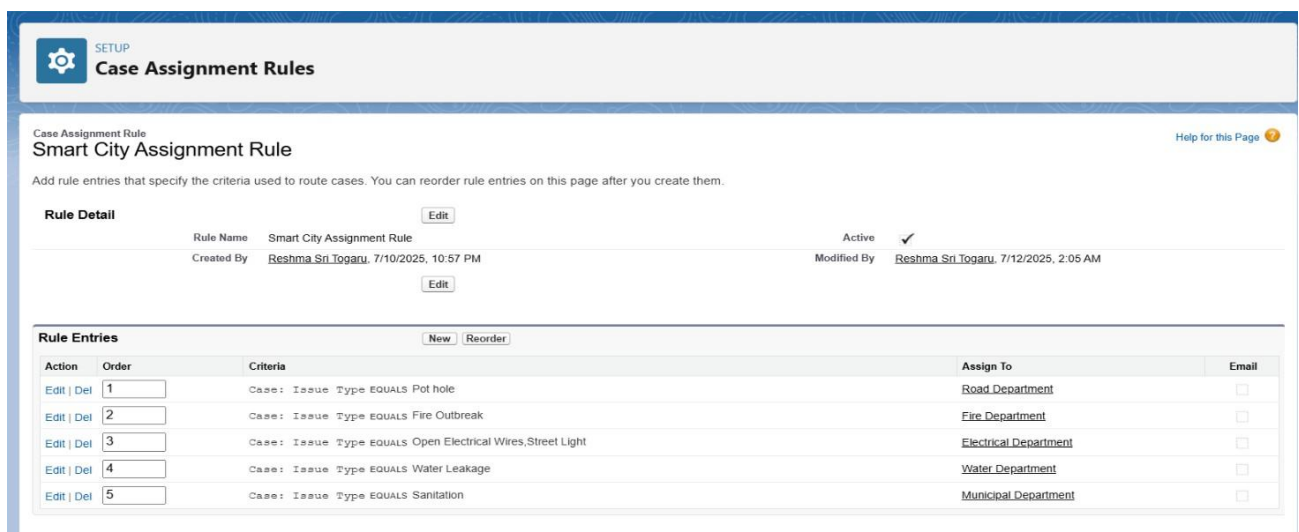
### **Assignment Rules:**

- \* 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



The screenshot shows the Salesforce Setup interface with the 'Queues' page selected. The left sidebar contains a navigation menu with categories like Users, Data, Feature Settings, Sales, Quotes, Service, Einstein, and User Interface. The main content area is titled 'Queues' and includes a description: 'Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.' Below the description is a table listing existing queues.

Action	Label	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit   Del	Citizen Service Queue	Citizen_Service_Queue		Case	Togaru_Reshma Sri	7/20/2025, 7:54 AM
Edit   Del	Electrical Department	Electrical_Department		Case	Togaru_Reshma Sri	7/20/2025, 12:44 AM
Edit   Del	Fire Department	Fire_Department		Case	Togaru_Reshma Sri	7/10/2025, 2:45 AM
Edit   Del	Municipal Department	Municipal_Department		Case	Togaru_Reshma Sri	7/10/2025, 2:48 AM
Edit   Del	Road Department	Road_Department		Case	Togaru_Reshma Sri	7/10/2025, 2:47 AM
Edit   Del	Water Department	Water_Department		Case	Togaru_Reshma Sri	7/10/2025, 2:46 AM



The screenshot shows the Salesforce Setup interface with the 'Case Assignment Rules' page selected. The page title is 'Smart City Assignment Rule'. Below the title is a description: 'Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.' The 'Rule Detail' section shows the rule is active and was created by Reshma Sri Togaru on 7/10/2025 at 10:57 PM. The 'Rule Entries' section contains a table with five entries, each with a criteria and an assigned department.

Action	Order	Criteria	Assign To	Email
Edit   Del	1	Case: Issue Type EQUALS Pot hole	Road Department	<input type="checkbox"/>
Edit   Del	2	Case: Issue Type EQUALS Fire Outbreak	Fire Department	<input type="checkbox"/>
Edit   Del	3	Case: Issue Type EQUALS Open Electrical Wires, Street Light	Electrical Department	<input type="checkbox"/>
Edit   Del	4	Case: Issue Type EQUALS Water Leakage	Water Department	<input type="checkbox"/>
Edit   Del	5	Case: Issue Type EQUALS Sanitation	Municipal Department	<input type="checkbox"/>

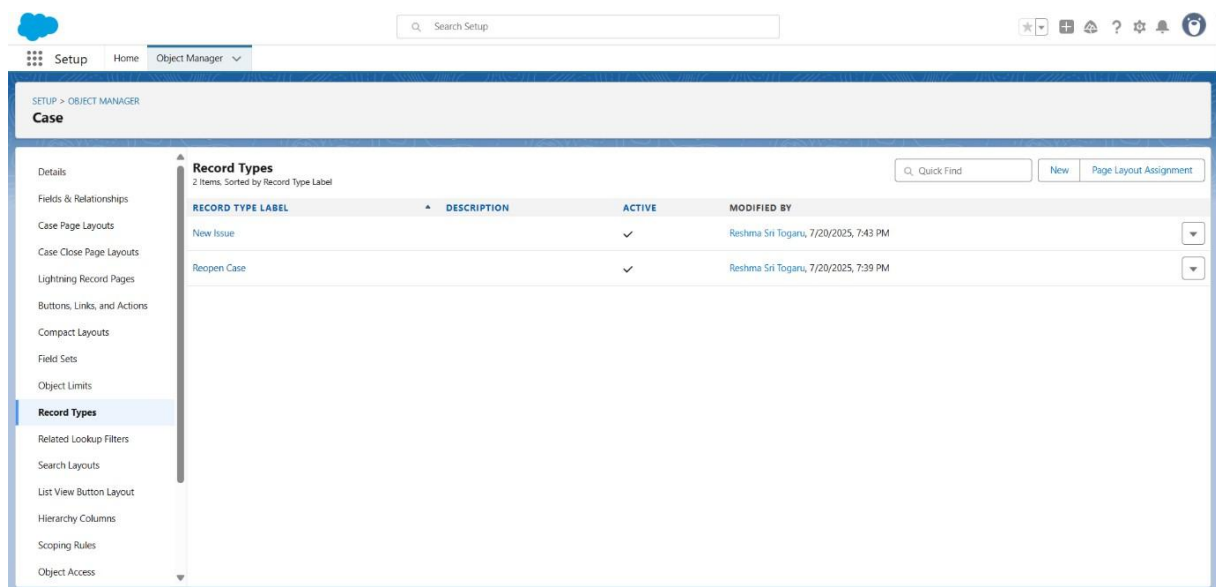
## Functionalities Implemented:

- \* 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

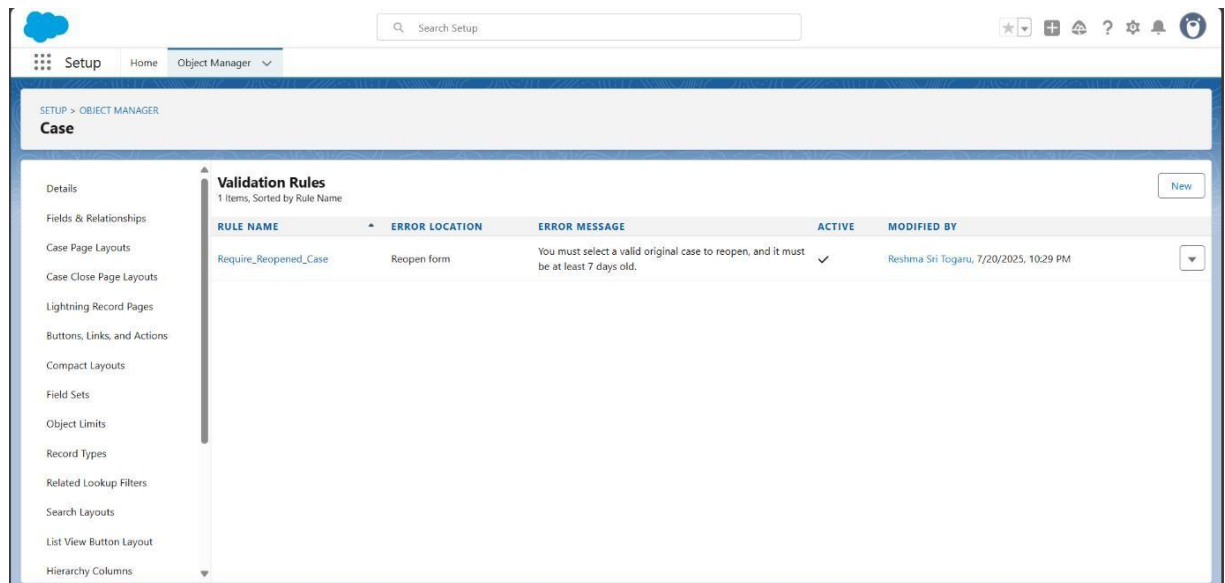
When admin creates a new case, Salesforce prompts them to choose a **Record Type**. This allows the system to distinguish between a **New Issue** and a **Reopen Request**. Based on the selected record type, different page layouts and validation logic are applied.

- **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).



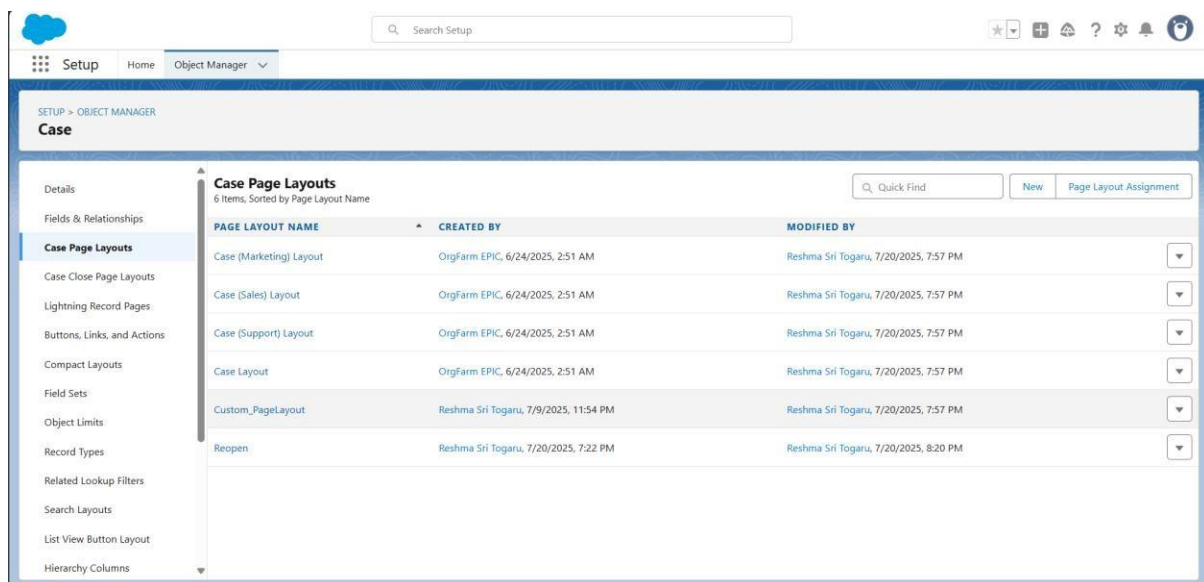
## Validation rule:

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

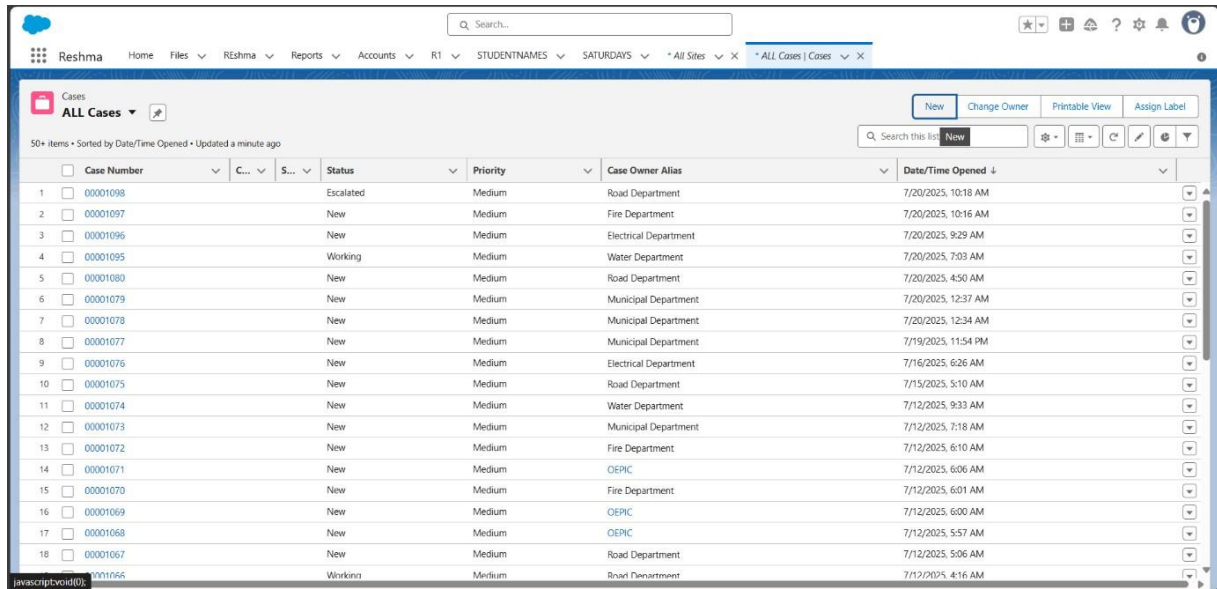
We created 2 page layouts for new issue and reopen case



**\*New Case Creation (Record Type: New Issue)**

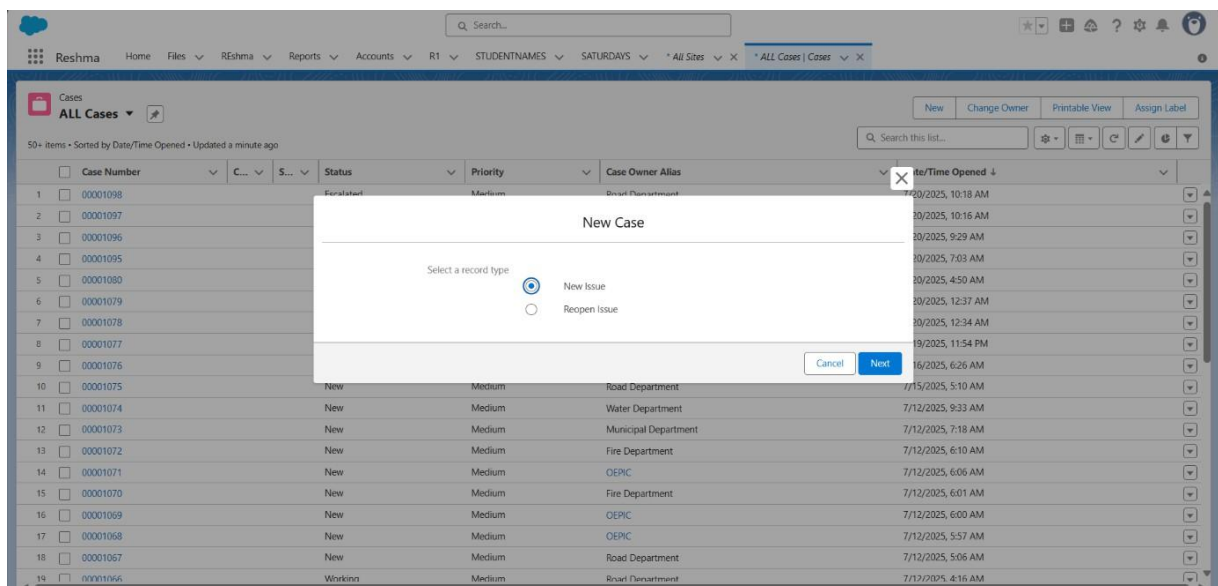
How admin selects "New Issue" and fills the form

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



	Case Number	C...	S...	Status	Priority	Case Owner Alias	Date/Time Opened
1	00001098			Escalated	Medium	Road Department	7/20/2025, 10:18 AM
2	00001097			New	Medium	Fire Department	7/20/2025, 10:16 AM
3	00001096			New	Medium	Electrical Department	7/20/2025, 9:29 AM
4	00001095			Working	Medium	Water Department	7/20/2025, 7:03 AM
5	00001080			New	Medium	Road Department	7/20/2025, 4:50 AM
6	00001079			New	Medium	Municipal Department	7/20/2025, 12:37 AM
7	00001078			New	Medium	Municipal Department	7/20/2025, 12:34 AM
8	00001077			New	Medium	Municipal Department	7/19/2025, 11:54 PM
9	00001076			New	Medium	Electrical Department	7/16/2025, 6:26 AM
10	00001075			New	Medium	Road Department	7/15/2025, 5:10 AM
11	00001074			New	Medium	Water Department	7/12/2025, 9:33 AM
12	00001073			New	Medium	Municipal Department	7/12/2025, 7:18 AM
13	00001072			New	Medium	Fire Department	7/12/2025, 6:10 AM
14	00001071			New	Medium	OEPIC	7/12/2025, 6:06 AM
15	00001070			New	Medium	Fire Department	7/12/2025, 6:01 AM
16	00001069			New	Medium	OEPIC	7/12/2025, 6:00 AM
17	00001068			New	Medium	OEPIC	7/12/2025, 5:57 AM
18	00001067			New	Medium	Road Department	7/12/2025, 5:06 AM
19	00001066			Working	Medium	Road Department	7/12/2025, 4:16 AM

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



New Case

Select a record type

☒ New Issue

☐ Reopen Issue

Cancel Next

\*After clicking “New Case” he has to fill out the form.

**New Case: New Issue**

\* = Required Information

\* Citizen Name:

\* Citizen Contact:

\* Citizen Email:

\* Location:

\* Issue Type:

Description:

\* Urgency:

\* Attachment:

\* Status:

Case Owner:

Other Options

Priority:

☒ Assign using active assignment rule

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.

**New Case: Reopen Case**

\* = Required Information

Reopen form

\* Status:

\* Citizen Name:

Description:

\* Citizen Email:

Optional

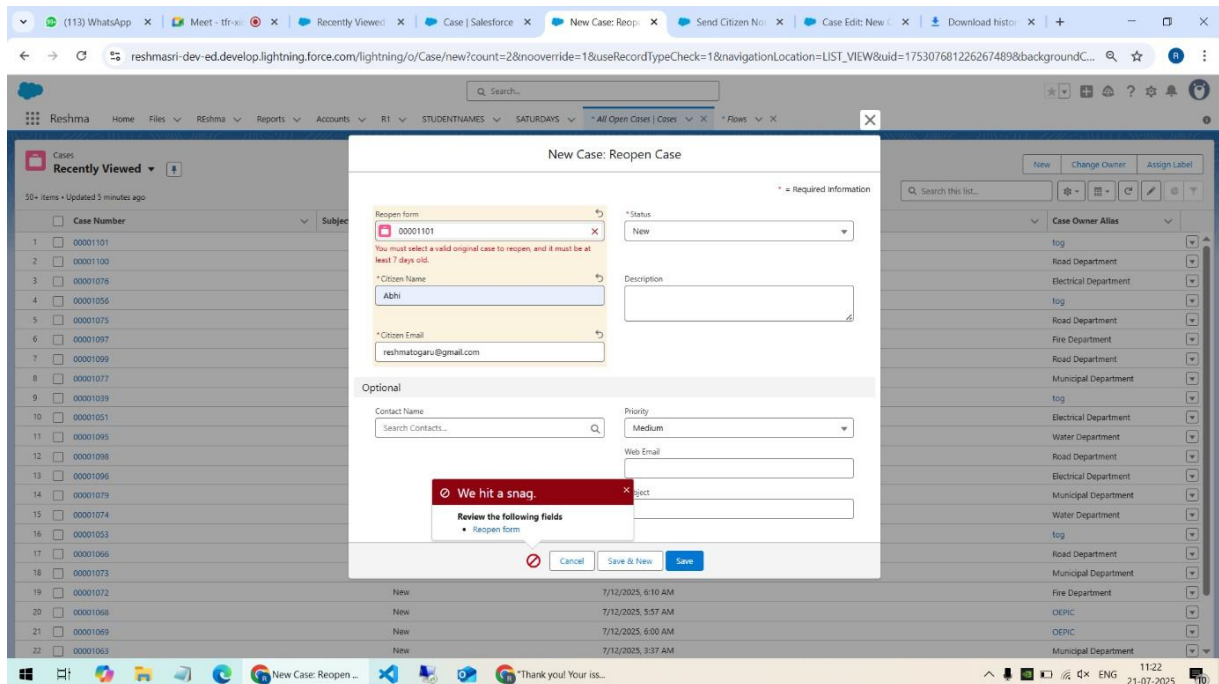
Contact Name:

Priority:

Web Email:

Subject:

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



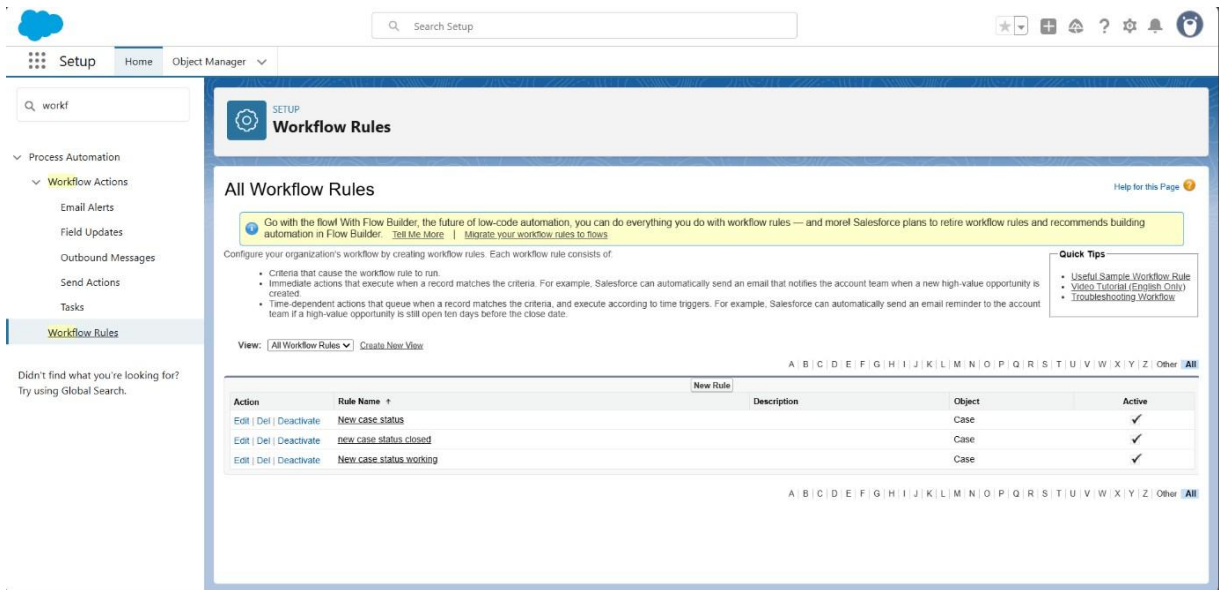
**For an email to be triggered there are 3 steps, as:**

**\*Creating the Email template**

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

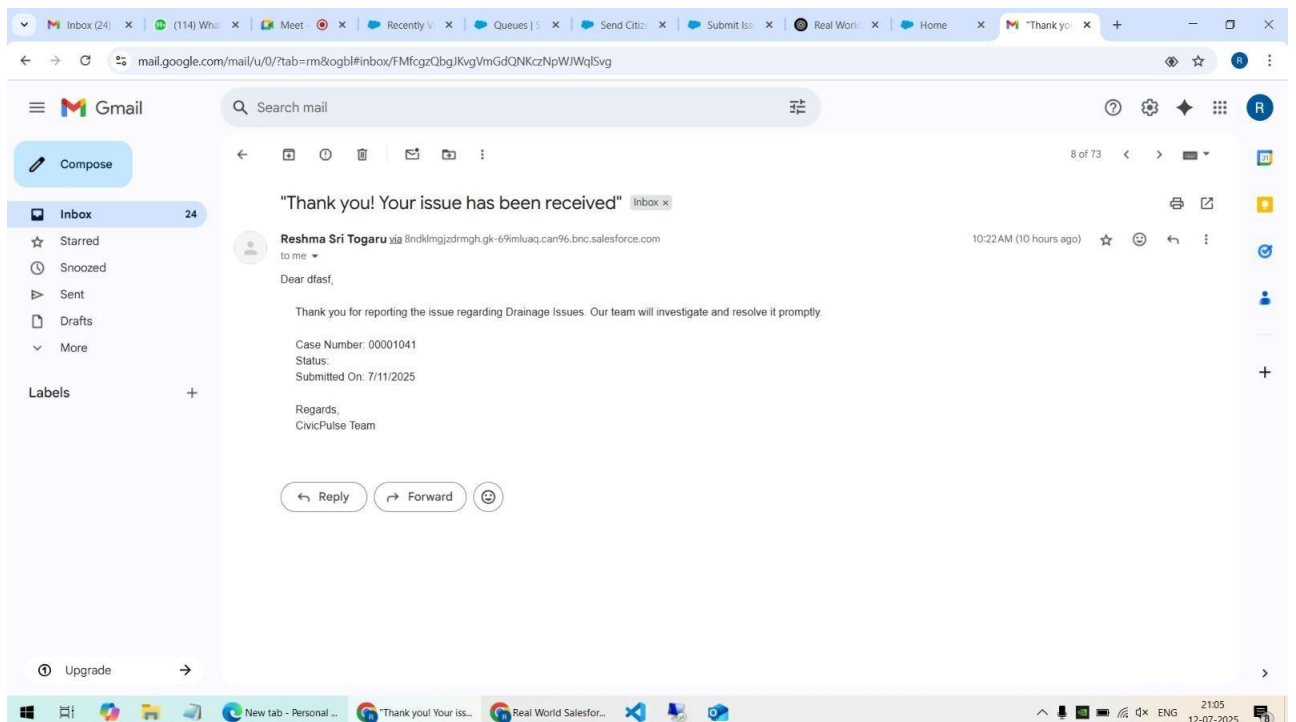
**\*Workflows for email-** When a record matches the criteria. Salesforce can automatically send an email that notifies the account



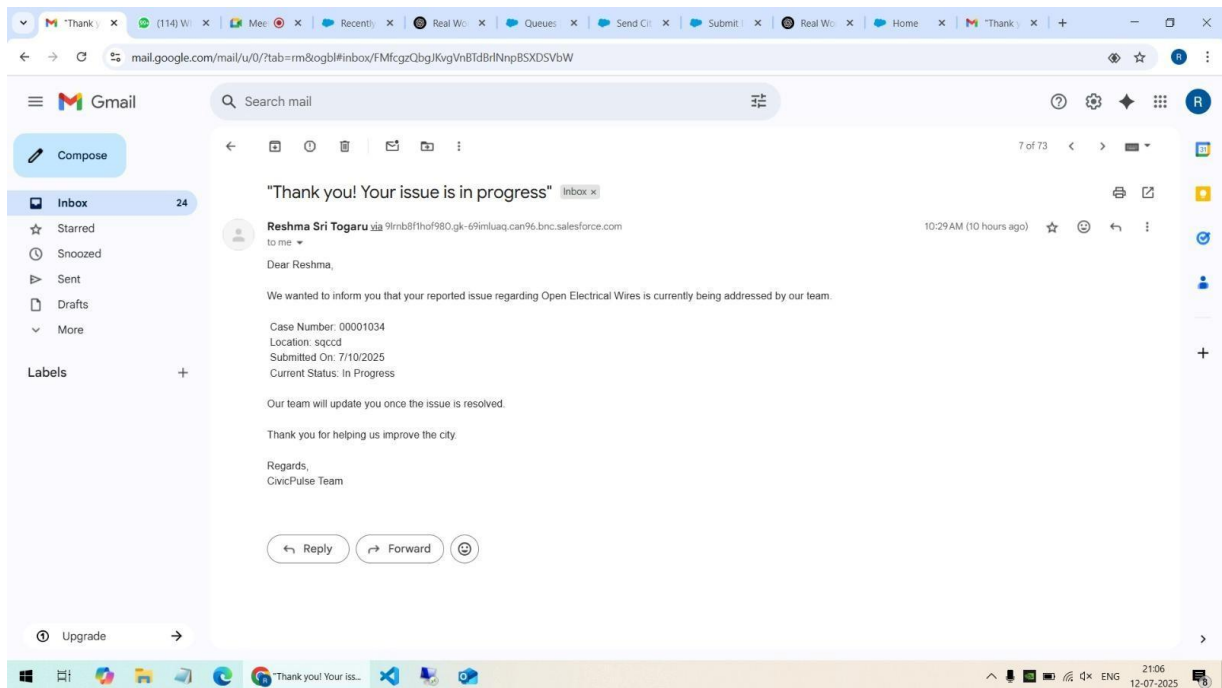


## Testing on Email Notifications:

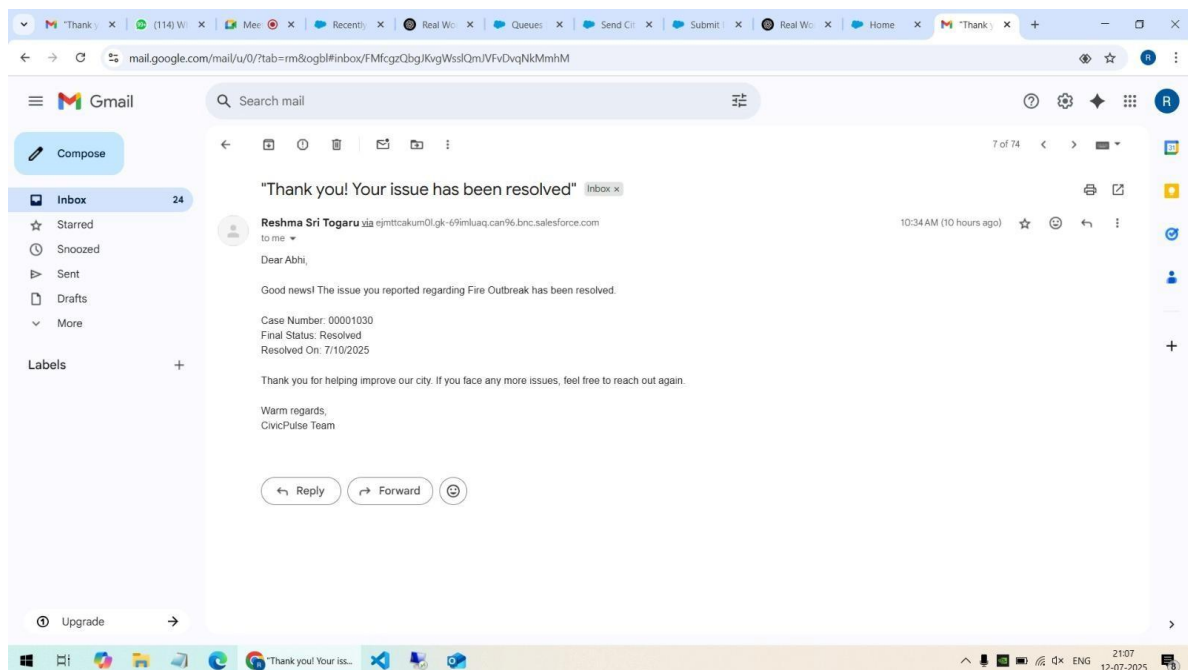
TC1: Email on case being received



## TC2: Email on case In Progress



## TC3: Email on case which has been Resolved



Reports & Dashboards:

