

THE SMART CITY ISSUE REPORTING & RESOLUTION PROJECT

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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

Setup Home Object Manager

Search Setup

qu

Users

Queues

Data

Mass Transfer Approval Requests

Feature Settings

Quip (Salesforce Anywhere)

Sales

Quotes

Quotes Settings

Service

Customer Contact Requests

Einstein

Einstein Search

Search Manager

Query Configurations

User Interface

Quick Test Settings

https://reshmasri-dev-ed.develop.lightning.force.com/lightning/setup/Queues/home

Queues

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.

View: All Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| 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 |

Case Assignment Rules

Smart City Assignment Rule

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail Edit

Rule Name: Smart City Assignment Rule

Created By: Reshma Sri.Togaru, 7/10/2025, 10:57 PM

Active: ☒

Modified By: Reshma Sri.Togaru, 7/12/2025, 2:05 AM

Rule Entries New Reorder

| 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"/> |

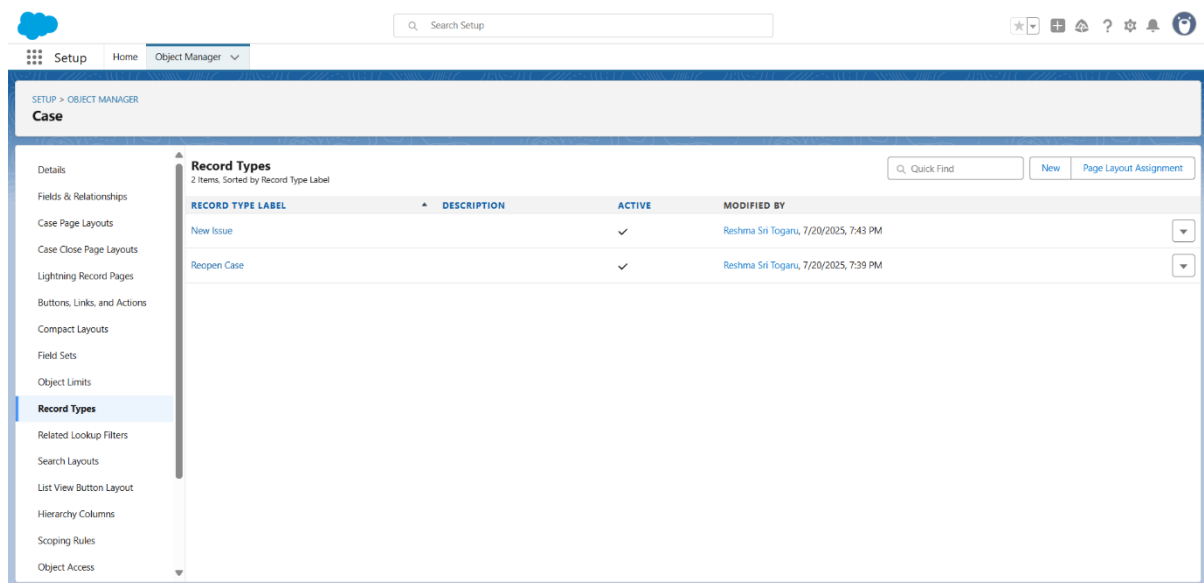
Functionalities Implemented:

- * 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

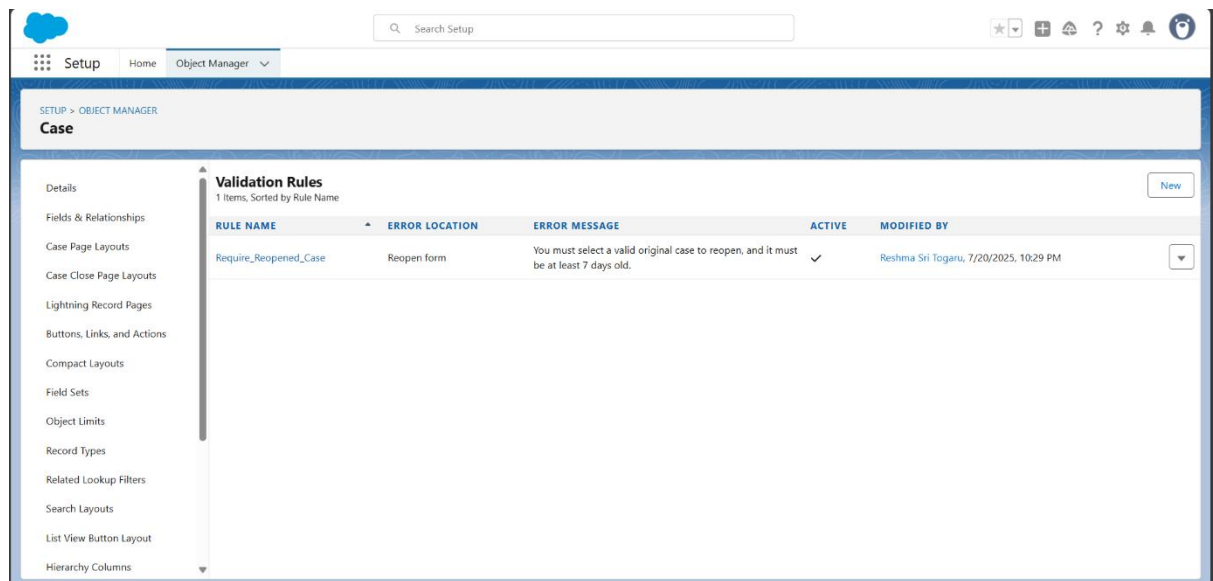
When admin creates a new case, Salesforce prompts them to choose a **Record Type**. This allows the system to distinguish between a **New Issue** and a **Reopen Request**. Based on the selected record type, different page layouts and validation logic are applied.

- **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).



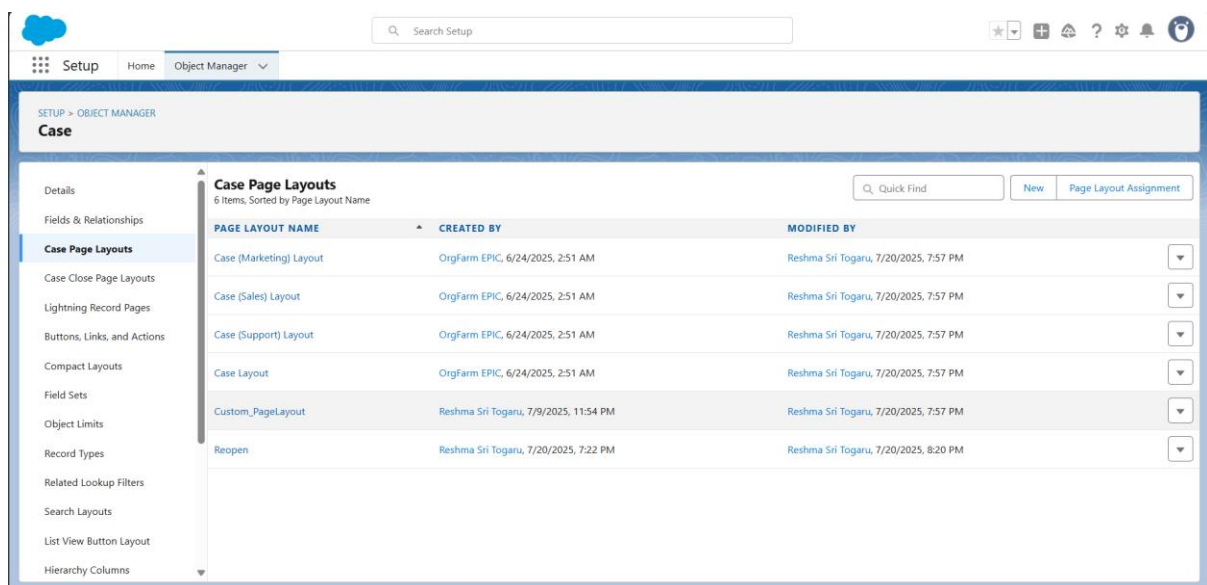
Validation rule:

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

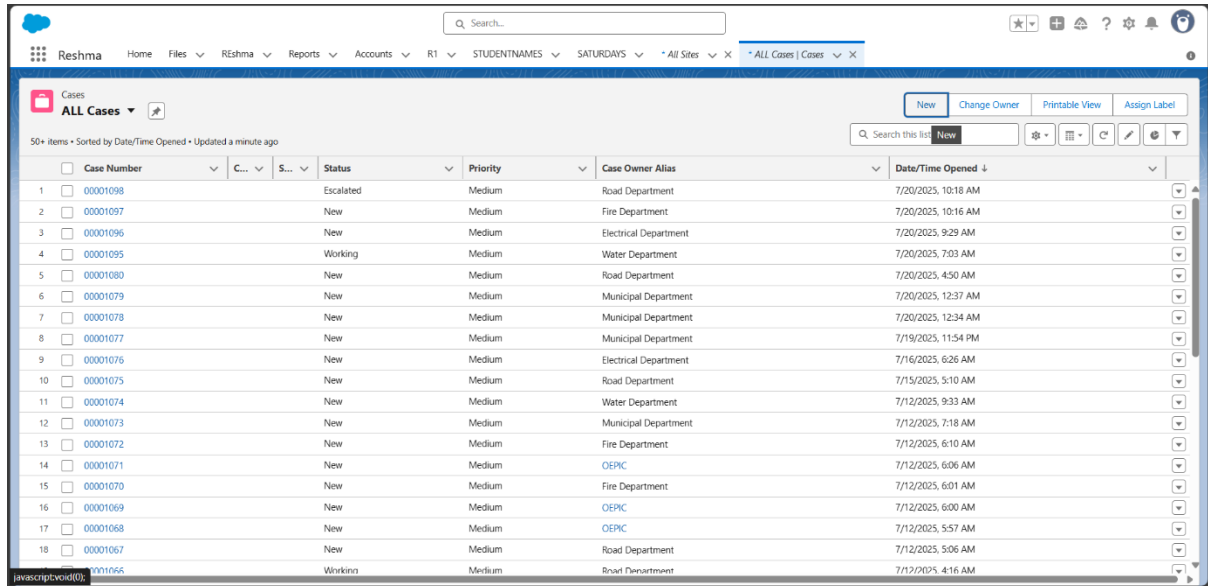
We created 2 page layouts for new issue and reopen case



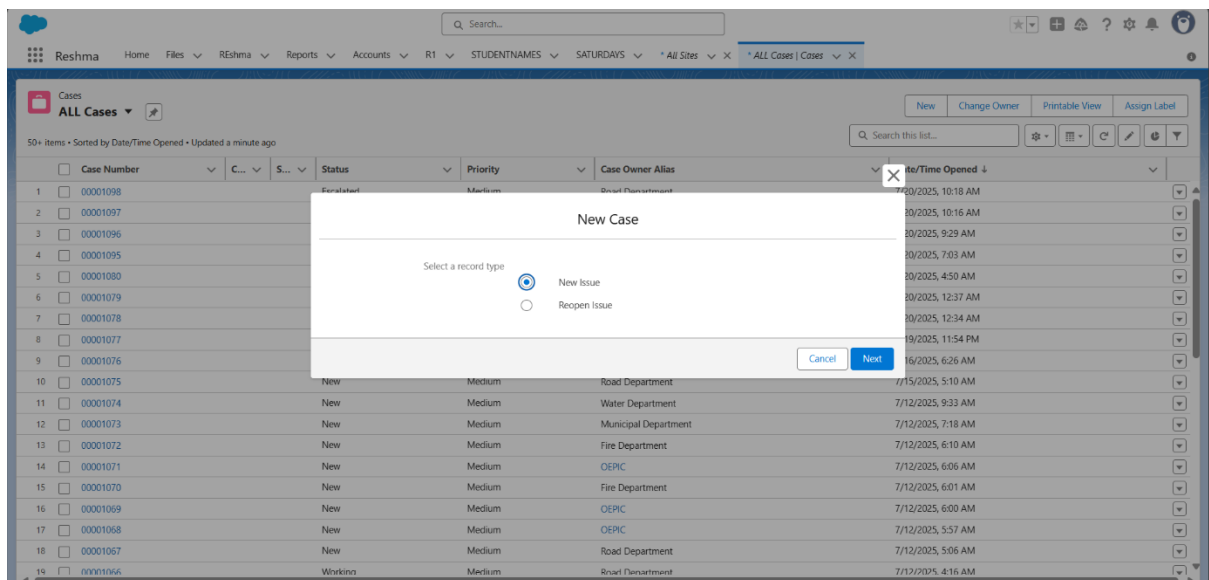
***New Case Creation (Record Type: New Issue)**

How admin selects "New Issue" and fills the form

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



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



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

New Case: New Issue

* = Required Information

* Citizen Name: rajeev

* Citizen Contact: 7894561230

* Citizen Email: rajeevmathews1223@gmail.com

* Location: near xyz location, kakinada

* Issue Type: Fire Outbreak

Description: there's a fire outbreak in our apartment

* Urgency: Medium

* Attachment: https://orgfarm-423a3532f2-dev-ed.develop.my.salesfor

* Status: New

Case Owner: Reshma Sri Togar

Other Options

Priority: ☐ Assign using active assignment rule

Buttons: Cancel, Save & New, Save

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

Search Cases...

* Status: New

* Citizen Name

Description

* Citizen Email

Optional

Contact Name: Search Contacts...

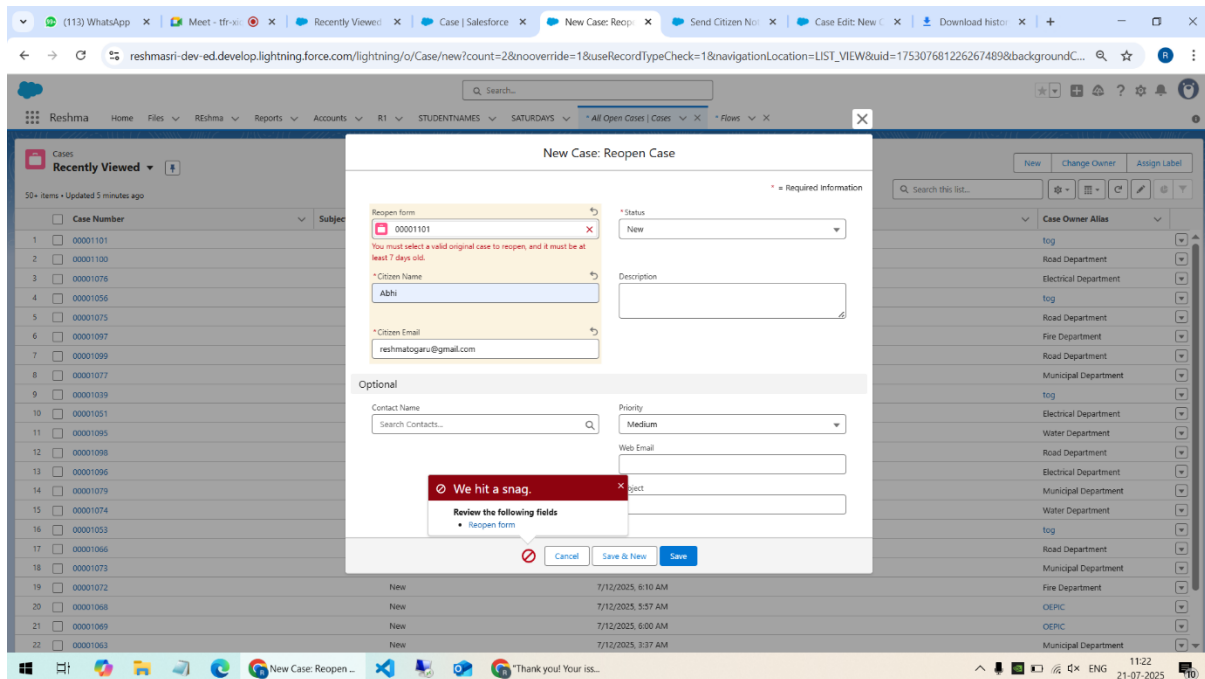
Priority: Medium

Web Email

Subject

Buttons: Cancel, Save & New, Save

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

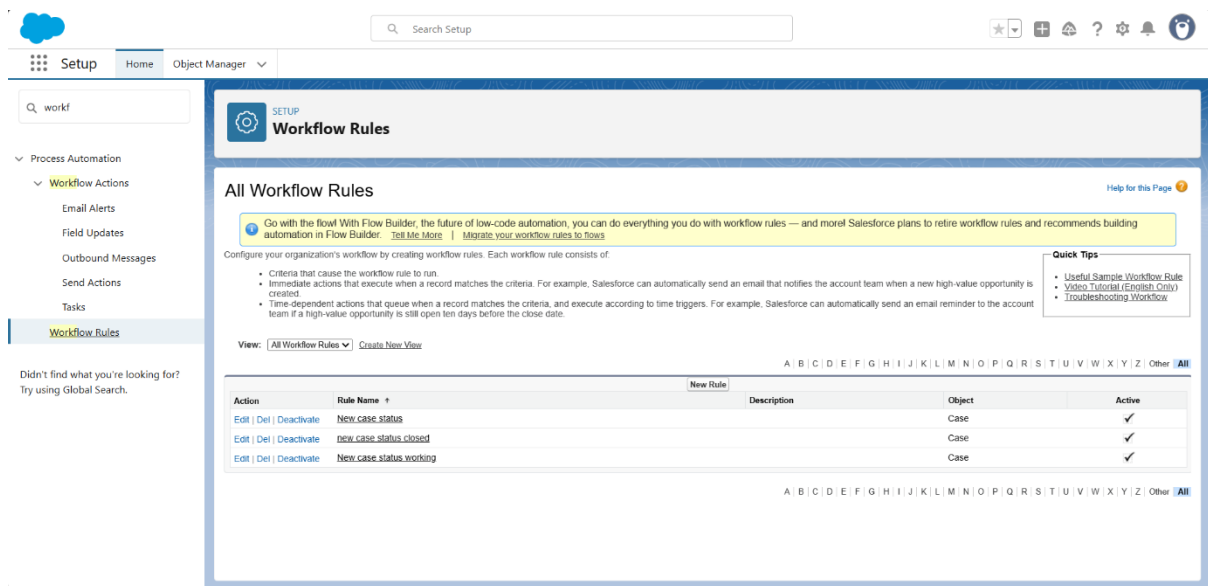


For an email to be triggered there are 3 steps, as:

***Creating the Email template**

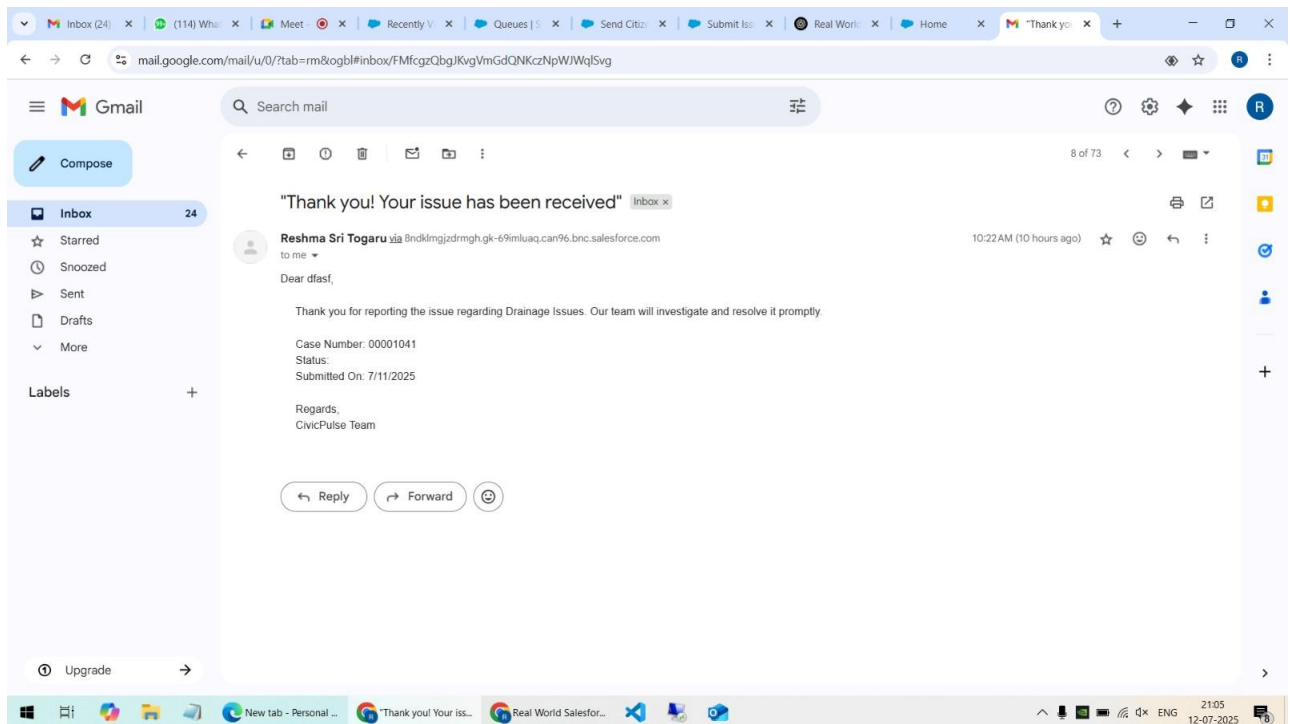
***Email alerts** to automatically send the email

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

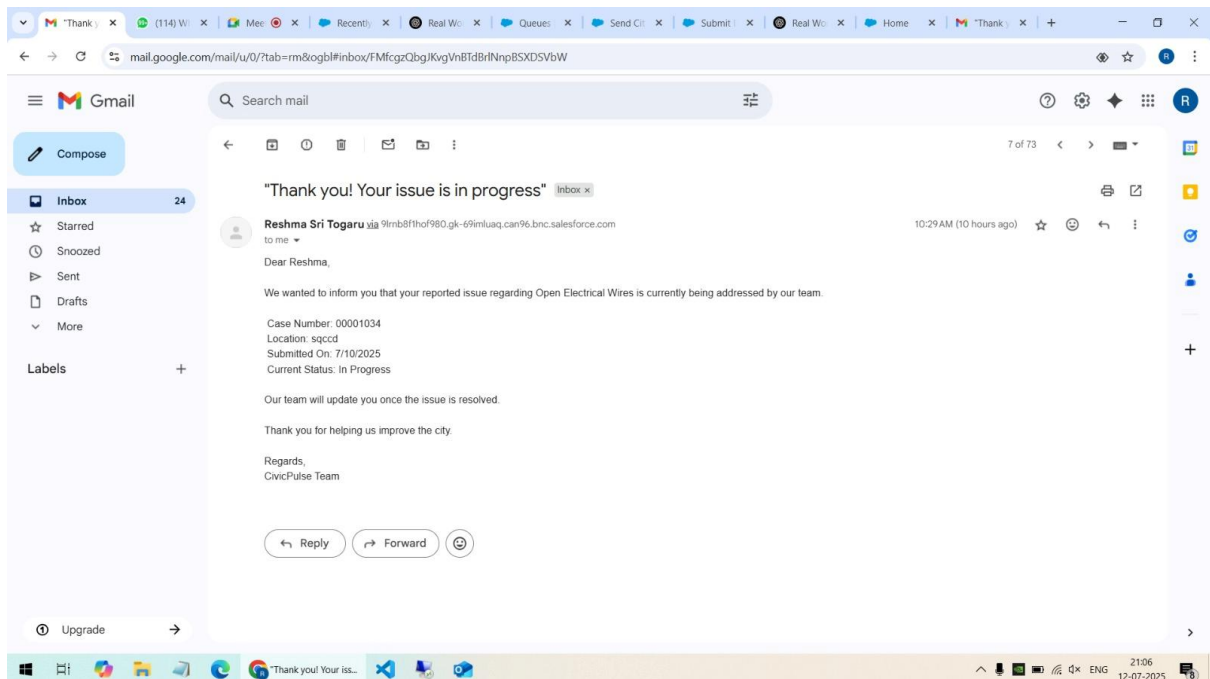


Testing on Email Notifications:

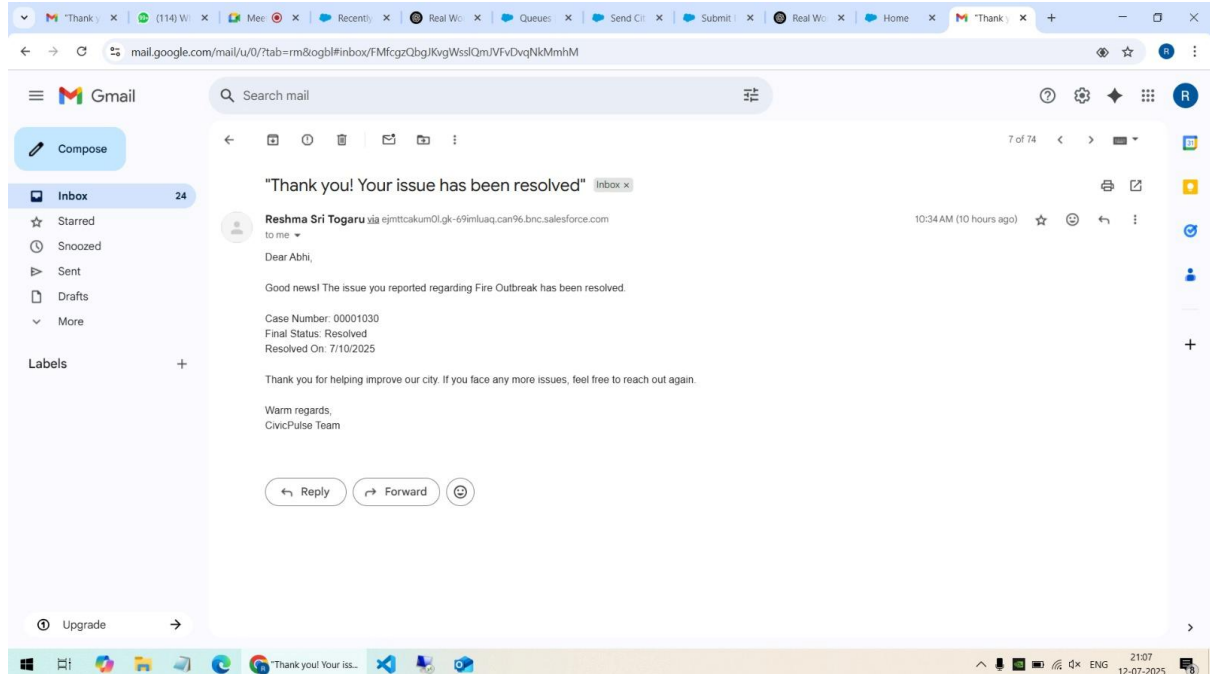
TC1: Email on case being received



TC2: Email on case In Progress



TC3: Email on case which has been Resolved



Reports & Dashboards:

Reshma

Home

Files

Reshma

Reports

Accounts

R1

STUDENTNAMES

SATURDAYS

All Sites

SMART CITY ISSUE REPOR...

My Cases

More

Report: Cases

Smart City Report

Enable Field Editing

Add Chart

Edit

Total Records

63

Issue Type

Citizen Name

Abhi

Anmu

awfaelaf

Ben

Chinnu

deepika

draf

ec

Emo

Escalation Officer

fgu

jdkihelshuad

John

nimmalaPUDI DEEPIKA

qef

Rajeev Bodd

Record Count

26

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

Drainage Issues

Record Count

0

0

0

0

0

0

0

1

1

0

0

0

0

0

0

0

0

Fire Outbreak

Record Count

0

1

0

0

0

0

1

0

0

0

0

0

0

0

0

0

0

Open Electrical Wires

Record Count

0

0

1

0

0

0

1

0

0

0

0

1

0

0

0

0

0

Pot hole

Record Count

0

1

0

1

0

0

0

0

0

0

0

0

0

1

0

0

2

Sanitation

Record Count

0

0

1

0

0

0

2

0

0

0

0

0

1

0

0

1

0

Stray Dogs

Record Count

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

Details (63 Rows)

Click an intersection in the table above to filter details.

Case Owner

Date/Time Opened

Citizen Email

Citizen Contact

Case Number

53

Reshma Sri Toganu

7/10/2025, 7:50 AM

reshma@gmail.co

479104327

00001028

54

Reshma Sri Toganu

7/11/2025, 4:20 AM

w@gmail.com

567453

00001040

55

Reshma Sri Toganu

7/10/2025, 8:02 AM

re@gmail.com

456789

00001029

56

Reshma Sri Toganu

7/12/2025, 2:27 AM

patient@ppt.com

01335678968

00001054

Row Counts

Detail Rows

Grand Total

Stacked Summaries

