**Phase 4: Process Automation (Admin)**

**Objectives**

To eliminate manual processes and ensure SLA compliance by leveraging **Salesforce automation tools** such as **Flows, Approval Processes, Workflow Rules, and Notifications**.

**Activities**

1. **Validation Rules**
   * Prevent refund amount > order value.
   * Ensure Return Reason is always captured.
2. **Workflow Rules**
   * Auto-send email to Finance when refund > ₹10,000.
   * Notify Warehouse team when a replacement is initiated.
3. **Process Builder**
   * On case closure, automatically update related Refund\_\_c record as “Completed”.
4. **Approval Processes**
   * **Refund Approval Workflow:**
     + Step 1: Finance Officer Review
     + Step 2: Finance Manager Approval (for >₹5,000)
     + Step 3: Ops Head Final Approval (for >₹50,000)
5. **Flow Builder Implementations**
   * **Screen Flow**: Customer-facing return initiation form in portal.
   * **Record-Triggered Flow**: When a new Return\_\_c record is created → auto-create related Case.
   * **Scheduled Flow**: Daily SLA monitoring – flag cases breaching SLA.
   * **Auto-Launched Flow**: Automatically send SMS/email when refund is processed.
6. **Email Alerts**
   * “Return Request Received” confirmation.
   * “Refund Approved” status.
   * “Replacement Shipped” with tracking details.
7. **Field Updates**
   * Update Case Status = “Closed” when Refund Status = Completed.
8. **Tasks**
   * Assign follow-up tasks to agents if refund not initiated within 48 hours.
9. **Custom Notifications**
   * Push notifications in Salesforce Mobile App for high-value refunds (>₹25,000).

**Deliverables**

* **Automation Matrix** (mapping manual processes to automation tools).
* **Flow Diagrams** for return, refund, replacement workflows.
* **Approval Hierarchy Document.**

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TCS Phase 2 : Batch 5