LegalAid Connect – Phase 4: Process Automation (Admin) Report

Project Title: LegalAid Connect – Legal Case Management CRM

Phase: 4 – Process Automation (Admin)

Date: 26 September 2025

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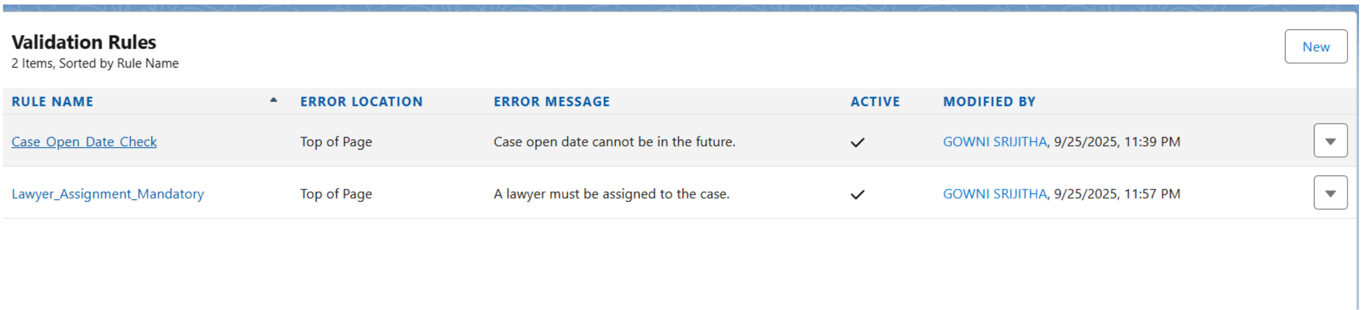
1. Introduction

- Phase 4 focused on automating business processes to reduce manual effort, enforce rules, and ensure data accuracy.
- Automation tools used: Validation Rules, Workflow Rules, Process Builder, Approval Processes, Flows, Escalation Rules, and Scheduled Flows.

2. Validation Rules

Ensure data integrity and prevent invalid entries across the system:

- **Case Dates:** Prevent End_Date__c from being before Start_Date__c in Legal_Case__c.
- **Mandatory Client Name:** Prevent blank Client__c field in Legal_Case__c.
- **Case Priority:** Ensure Priority__c is set to High, Medium, or Low.
- **Fee Amount:** Ensure Fee__c is greater than zero in Billing__c.
- **Lawyer Assignment:** Prevent saving a case without an assigned lawyer.



Validation Rules

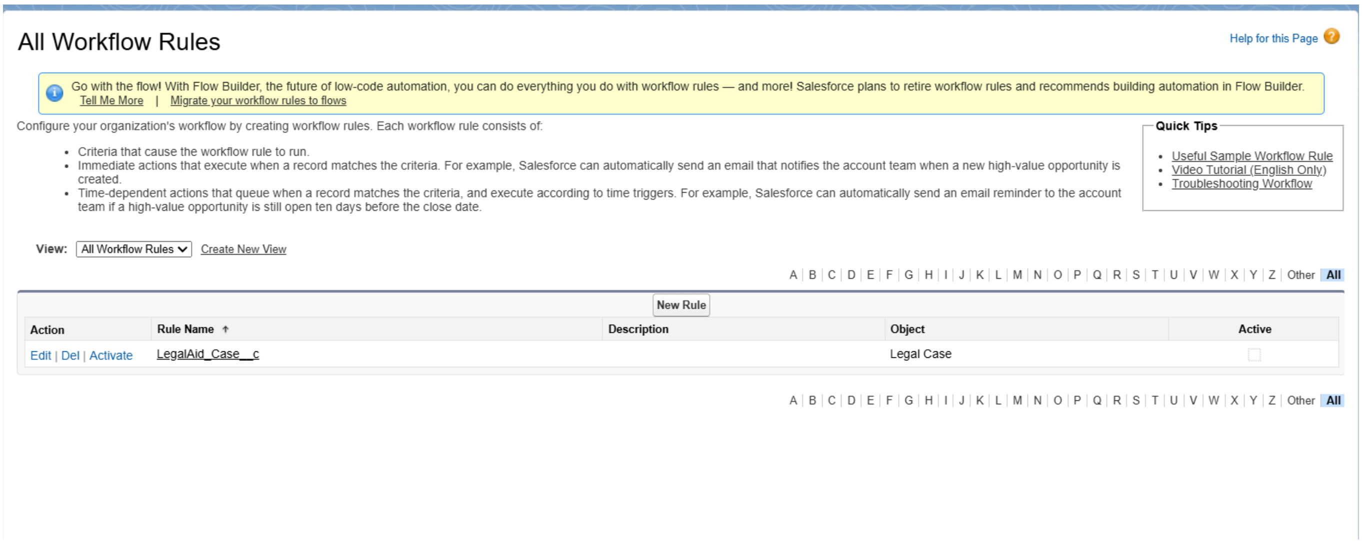
2 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Case Open Date Check	Top of Page	Case open date cannot be in the future.	✓	GOWNI SRIJITHA, 9/25/2025, 11:39 PM
Lawyer_Assignment_Mandatory	Top of Page	A lawyer must be assigned to the case.	✓	GOWNI SRIJITHA, 9/25/2025, 11:57 PM

3. Workflow Rule

- **Object:** Legal_Case__c
- **Rule Name:** Notify_Client_On_Case_Update
- **Purpose**: Automatically notify clients when their case status is updated**.**
- **Evaluation Criteria:** Created and every time it's edited to meet criteria
- **Rule Criteria:** All records or specific status changes (e.g., "Filed," "Hearing Scheduled")
- **Action**: Email Alert to Related_Client__c
  - Email Template Example:
  - Hello {!$Record.Related_Client__c.Name},
  - Your case {!$Record.Case_Name__c} has been updated.
  - Current Status: {!$Record.Status__c}
  - Please review any instructions or documents shared by your lawyer.



4. Process Builder

Object: Legal_Case__c

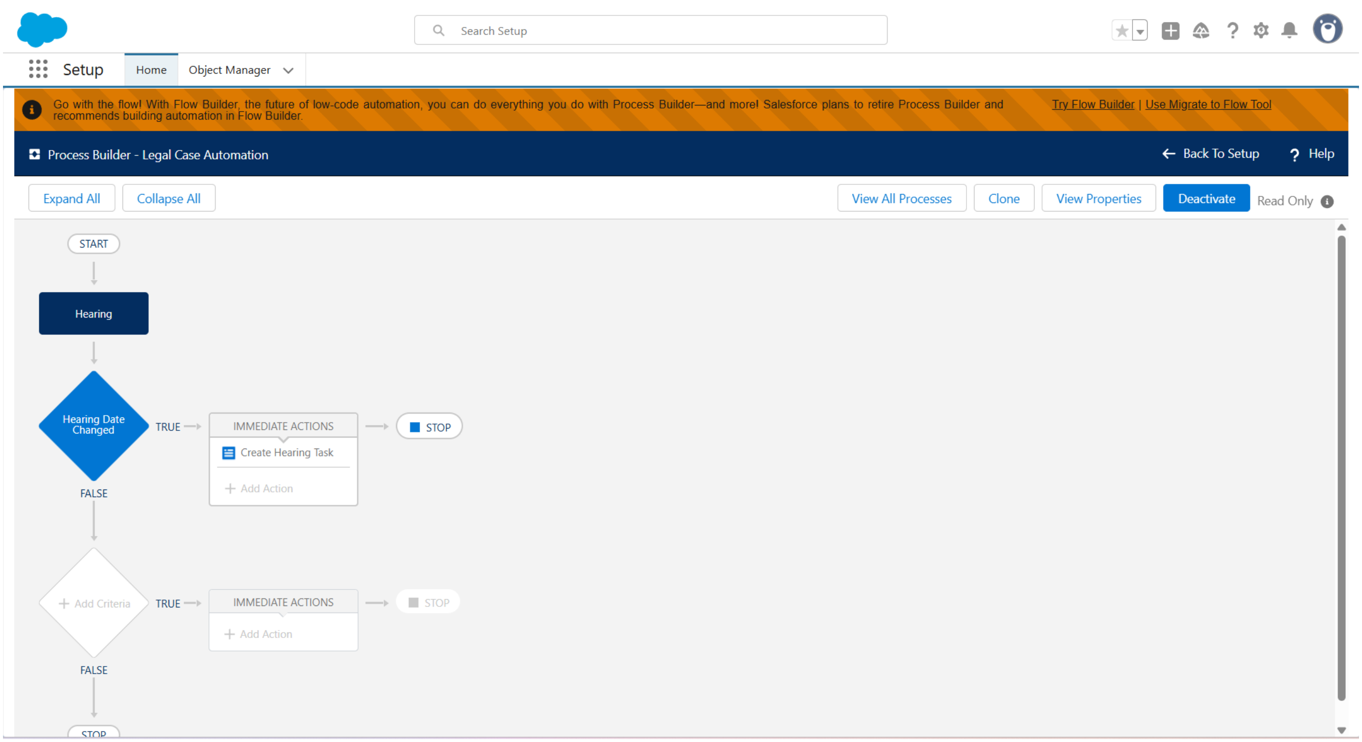
Process Name: Create_Task_On_Case_Update

Purpose: Automatically create a Task whenever a case is updated with important information.

Criteria: Status__c is changed AND is not null

Immediate Action: Create Task

- Subject: "Follow-up on Case Update"
- Assigned To: Case Owner or Assigned Lawyer
- Due Date: Today or based on Status
- Related To: Legal_Case__c record



5. Approval Process

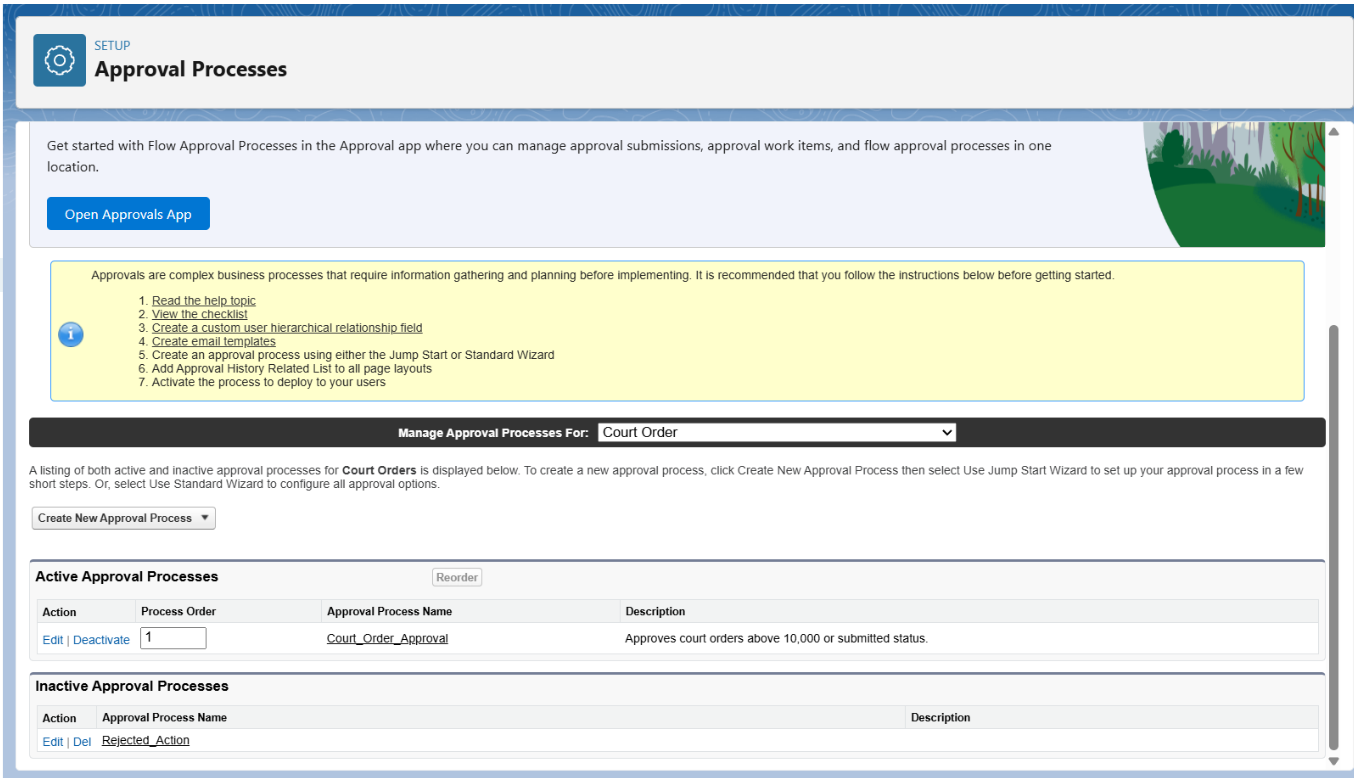
Object: Billing__c

Approval Process Name: Client_Bill_Approval

Purpose: Ensure all client bills are approved by a Senior Lawyer before sending.

Entry Criteria: Status__c = "Submitted"

- **Steps:**
  - Submission → Approver: Assigned Lawyer or Senior Lawyer
  - Approved → Update record / notify client
  - Rejected → Update record / notify client



6. Flow 1 — Procurement → Traceability Ledger

Object: Legal_Case__c

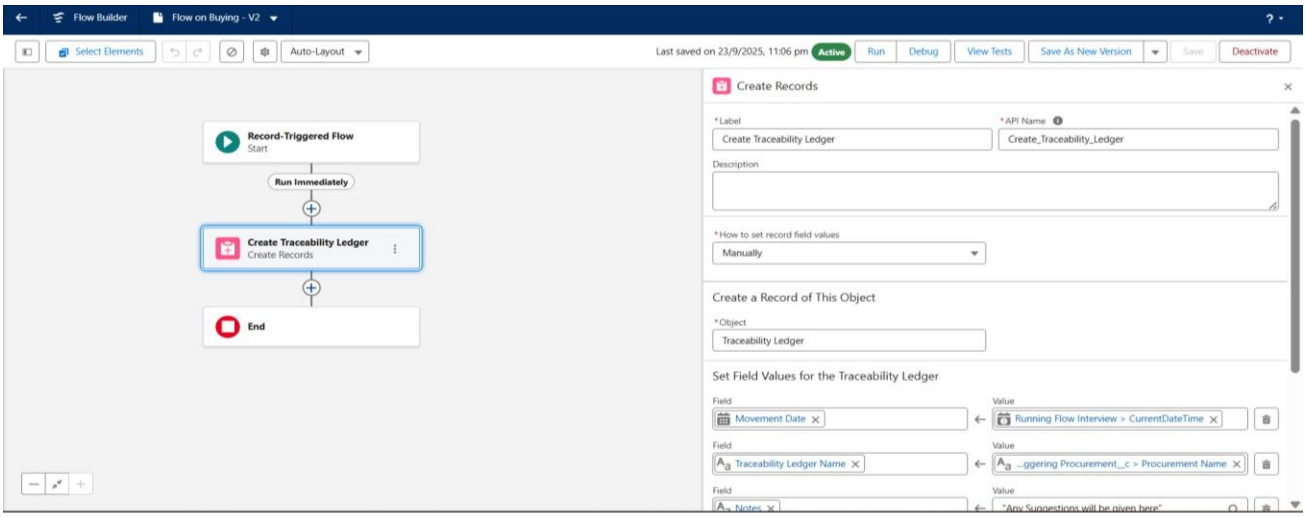
Trigger: Record-created

Action: Automatically create a Case_Ledger__c record

Field Mapping:

- Related Case → {!$Record.Id}
- Stage → “Created”
- Record Date → {!$Flow.CurrentDateTime}

Purpose: Logs case entries automatically for auditing and traceability.



7. Flow 2 — Crop_Cycle → Advisory

Object: Legal_Case__c

Trigger: Record-created

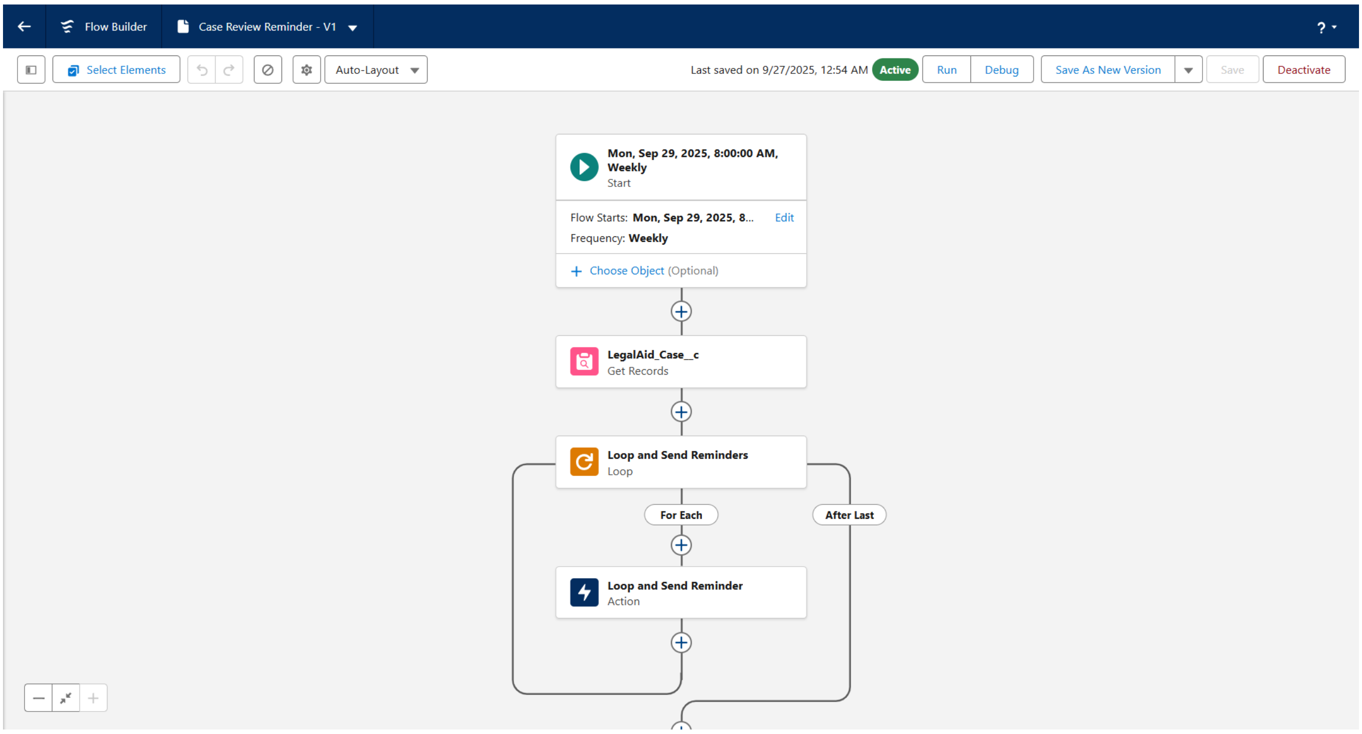
Decision: Case Type = “Civil”

Action: Create Advisory__c record

Field Mapping:

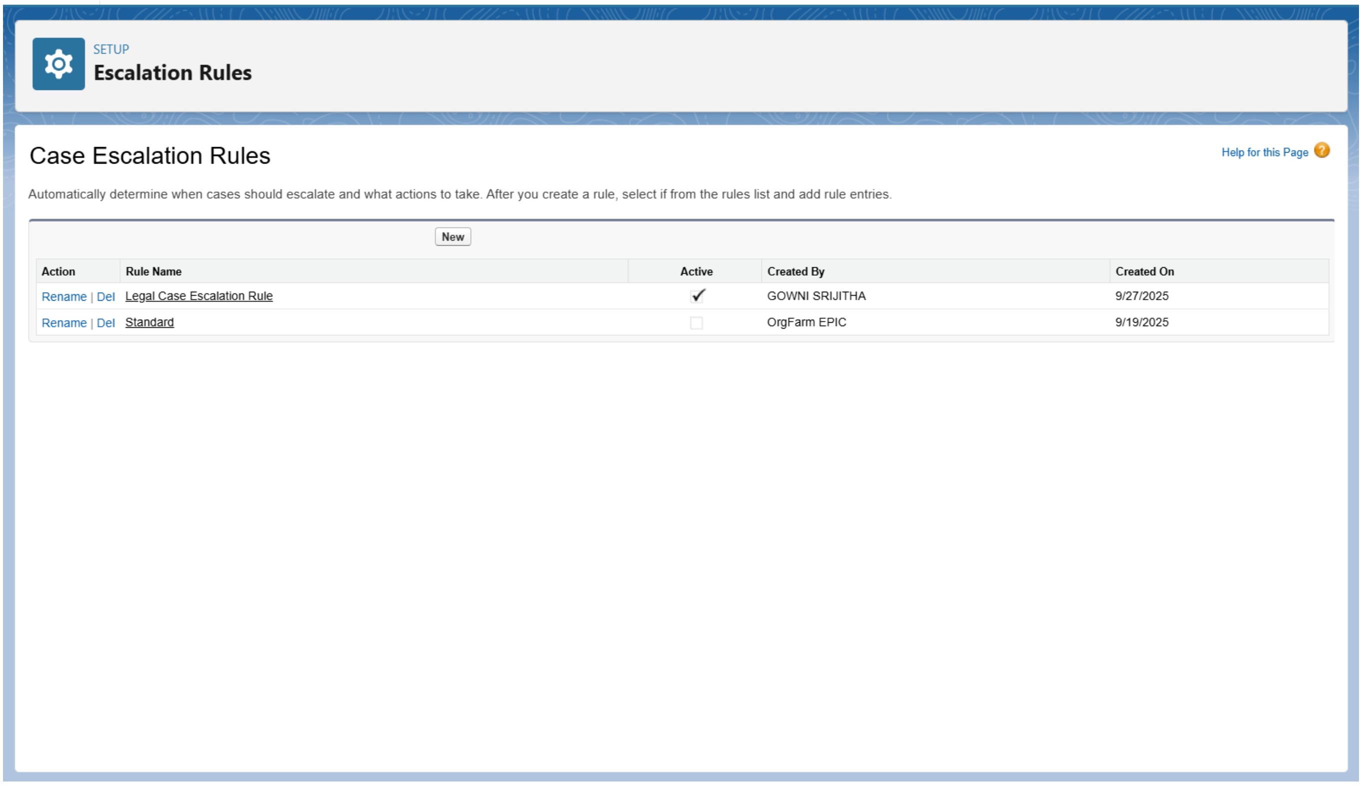
- **Advisory Name →** “Advisory for Case ” & {!$Record.Case_Name__c}
- **Advisory Date →** {!$Flow.CurrentDate}
- **Advisory Text →** “Please follow instructions regarding your case type.”
- **Related Client →** {!$Record.Related_Client__c}
- **Owner →** Assigned Lawyer

? **Purpose:** Automates advisory suggestions for clients upon case registration.



8.Escalation Rules

- **Escalation Rule 1 – Advisory Not Acknowledged:**
  - Object: Case (linked to Advisory)
  - Condition: Advisory not acknowledged within 48 hours
  - Escalation: Assign to Senior Lawyer or Case Manager
- **Escalation Rule 2 – Billing Approval Pending:**
  - Object: Billing__c
  - Condition: Status = Submitted for more than 72 hours
  - Escalation: Escalate to Senior Lawyer



9.Scheduled Flows

- **Scheduled Flow 1 – Advisory Reminder:** If an advisory is not marked "Completed" within 3 days, send a reminder email to the client.
- **Scheduled Flow 2 – Court Hearing Alert:** Send notifications 7 days before the scheduled court hearing.
- **Scheduled Flow 3 – Billing Reminder:** Send a reminder to clients 5 days before bill due date.

10. Phase 4 Outcome

- Data integrity is enforced with **Validation Rules**
- Farmers are automatically notified via **Workflow Rule**
- Tasks for harvest follow-ups are auto-created via **Process Builder**
- Procurement requests are approved systematically via **Approval Process**
- Traceability Ledger and advisories are auto-generated via **Flows**

Phase 4 is complete and ready for inclusion in the final project report.