

Phase 4: Process Automation (Admin)

Project Title: Customer Support Ticket Management System

In this phase, we enhance the functionality of the Customer Support Ticket Management System by introducing process automation. Salesforce provides several automation tools that ensure **data accuracy, workflow efficiency, and real-time notifications**.

The key automation features implemented are:

- **Validation Rules** – Prevent incorrect or invalid data entry.
- **Workflow Rules** – Automate routine tasks such as notifications.
- **Flow Builder** – Build advanced automation to update data and implement approval logic.
- **Email Alerts** – Notify employees and managers about leave requests and approvals.

These features collectively make the leave management system **smarter, faster, and more user-friendly**.

1. Validation Rules

Validation rules ensure that employees cannot apply for more leaves than they are entitled to. This prevents misuse and ensures company leave policies are followed.

Implementation

- **Object:** Support_Ticket__c
- **Rule Name:** Priority_Required
- **Formula:** TEXT(Priority__c) = ""
- **Error Message:** Priority must be selected before saving the ticket.
- **Error Location:** Top of the page

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Support Ticket

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Support Ticket Validation Rule

Back to Support Ticket

Validation Rule Detail

EditClone

Rule Name	Priority_Required	Active	✓
Error Condition Formula	ISPICKVAL(Priority__c, "")		
Error Message	Priority must be selected before saving the ticket.	Error Location	Top of Page
Description			
Created By	Sai Subha Kanthi pusapati, 12/17/2025, 1:54 AM	Modified By	Sai Subha Kanthi pusapati, 12/17/2025, 1:54 AM

EditClone

2. Flow Builder

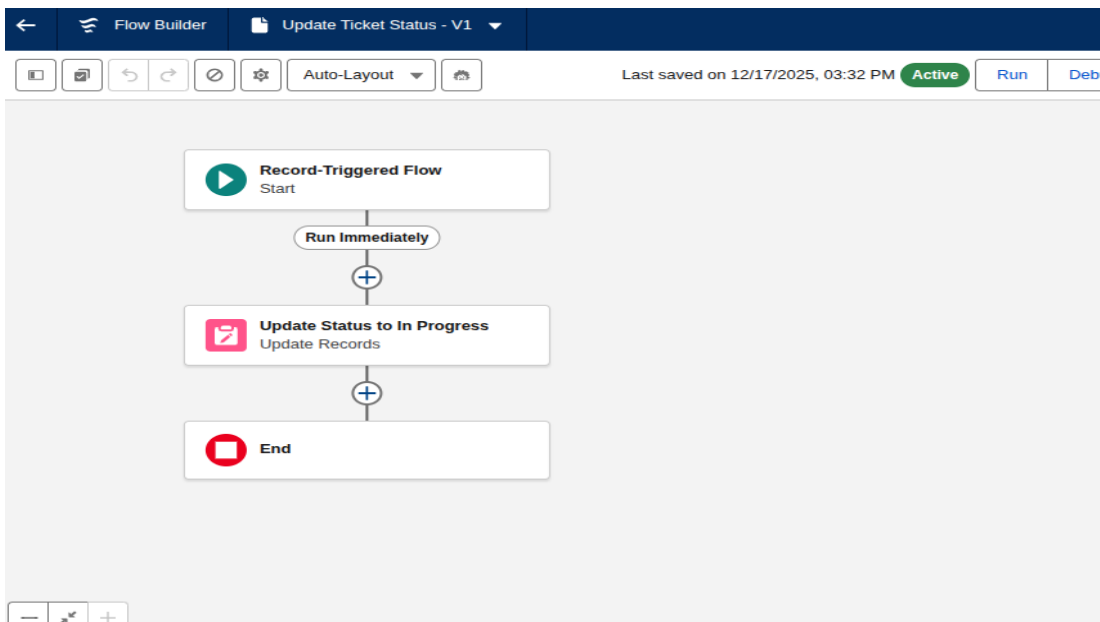
Purpose

Flow Builder provides **advanced automation**. In this project, flows are used to:

- Deduct leave balance automatically when approved.
- Send notifications Automatically.

Implementation

- **Flow Name:** Update Ticket Status
- **Type:** Record-Triggered Flow
- **Trigger:** When Support_Ticket__c record is updated
- **Steps:**
 1. **Decision Element:** A **Decision Element** is used to check the current ticket status.
 2. **If Status = "Resolved":**
 - The system automatically updates the ticket status to **Closed**.
 3. **If Status = "Rejected":**
 - The system updates the ticket status to **Closed**
 4. The updated ticket record is saved automatically by Salesforce.



3. Email Alerts

Purpose

Email alerts are used to keep support agents and support managers informed about the status of customer support tickets. These notifications ensure timely awareness of new tickets, updates, and ticket closures, thereby improving response time and coordination within the support team.

Implementation

- **Email Alert Name:** New_Ticket_Notification
 - Triggered when a new support ticket is created.
 - Notifies the support manager about the newly raised ticket.
- **Email Alert Name:** Ticket_Status_Update_Notification
 - Triggered when the ticket status is updated to **Resolved** or **Closed**.
 - Notifies the support agent and relevant stakeholders.