Multi-Channel Customer Support Hub (Omnichannel Support Project)

This project is a Salesforce-based Omnichannel Support System that centralizes customer queries from Email, WhatsApp, Chat, and Social Media into a single platform. It enables automated case creation and assignment, SLA management, sentiment-based prioritization, and real-time dashboards for agents and managers.

The system helps support agents respond faster, managers monitor performance, and customers receive consistent and timely responses, improving overall customer satisfaction and retention.

**Phase 1: Problem Understanding & Industry Analysis**

**1. Requirement Gathering**

* **Objective**: Enable companies to manage customer queries from multiple channels (Email, WhatsApp, Chat, Social Media) in one Salesforce platform.
* **Gathered Requirements**:
  + **Unified Inbox** → Central place where all customer queries arrive.
  + **Case Management** → Auto-create and assign Cases from incoming queries.
  + **Omnichannel Routing** → Distribute cases to available agents based on skills, priority, or workload.
  + **SLAs & Escalations** → Ensure timely resolution with automated reminders.
  + **Sentiment Analysis** → Flag negative/urgent cases automatically.
  + **Reports & Dashboards** → Track resolution times, agent productivity, and channel effectiveness.

**2. Stakeholder Analysis**

* **Primary Stakeholders**:
  + **Support Agents** → Need an easy-to-use interface to respond to queries from multiple channels.
  + **Customers** → Expect quick and consistent responses, regardless of channel.
  + **Support Managers** → Need visibility into KPIs (first response time, resolution time, customer satisfaction).
  + **IT/Admin Team** → Responsible for Salesforce setup, integration with channels (WhatsApp, Chatbot, Social), and security.

**3. Business Process Mapping**

* **Current Process (Without Salesforce):**
  + Customers reach out via Email, WhatsApp, or Social Media.
  + Agents handle them separately → responses delayed, duplicate handling possible.
  + Escalations missed due to lack of tracking.
  + Managers cannot measure customer satisfaction properly.
* **Proposed Salesforce Process:**
  + All incoming queries **auto-converted into Cases** in Salesforce.
  + **Omnichannel Routing** assigns Cases based on priority and availability.
  + Agents reply from Salesforce → response is sent back via the original channel (Email, WhatsApp, Chat).
  + **SLAs** applied → if not resolved in time, the case escalates.
  + **LWC Unified Inbox** for agents → one screen to view/respond across channels.
  + **Dashboards** → show total cases, resolution time, customer sentiment breakdown.

**4. Industry-Specific Use Case Analysis (Customer Support)**

* **Omnichannel Support** is critical for BPOs, Call Centers, D2C Brands, and E-commerce firms.
* **Customer Retention** depends heavily on fast & personalized responses.
* **Multi-channel engagement** reduces the risk of customers being ignored.
* **Sentiment-driven escalation** improves customer satisfaction scores (CSAT).

*Example*:  
Without Salesforce → A customer sends a WhatsApp query and waits 2 days for a response.  
With Salesforce → Case auto-created, routed to available agent, and SLA ensures a **1-hour response time**.

**5. AppExchange Exploration**

* **Useful Salesforce Apps for Multi-Channel Support**:
  + **Digital Engagement Add-on** → Natively supports WhatsApp, Facebook Messenger, SMS, and Web Chat.
  + **Einstein Bots** → Automates FAQs and routes complex queries to human agents.
  + **Twilio/SMS Magic** → For WhatsApp & SMS integration.
  + **Vonage/Genesys Cloud** → Voice channel integration.
  + **SurveyMonkey or Salesforce Surveys** → Collect post-resolution feedback.

**Phase 2: Org Setup & Configuration**

**1. Salesforce Editions**

* **Action:** Use Salesforce **Developer Edition** with **Service Cloud + Digital Engagement Add-on**.
* **Outcome:** Provides core Service Cloud features (Case Management, Omni-Channel) and access to WhatsApp, Chat, and Social integrations.

**2. Company Profile Setup**

* **Action:** Configure company information → support email address, default currency, timezone = IST, fiscal start = April.
* **Outcome:** Ensures all customer interactions (cases, SLAs, reports) are tracked in the right **business context**.

**3. Business Hours & Holidays**

* **Action:** Define business hours (Mon–Sat, 9 AM–6 PM) and add holidays (e.g., national holidays, weekends).
* **Outcome:** Case escalation timers (SLAs) respect working hours and avoid firing during holidays.

**4. Fiscal Year Settings**

* **Action:** Enable **custom fiscal year** (April–March).
* **Outcome:** Reports and dashboards align with company’s real reporting cycle.

**5. User Setup & Licenses**

* **Action:** Create users for different roles:
  + **Support Agent (Service Cloud license)** → Handles incoming queries.
  + **Support Manager (Service Cloud + Reporting access)** → Monitors cases and dashboards.
  + **Integration User (API-enabled)** → Connects WhatsApp, Chatbot, Social Media.
  + **Admin/Developer** → Manages configuration and custom development.
* **Outcome:** Proper licensing ensures every stakeholder has the right tools.

**6. Profiles**

* **Action:**
  + Create **Agent Profile** → Access to Cases, Knowledge, but restricted to their records.
  + Create **Manager Profile** → Full visibility on Cases, Reports, Dashboards.
* **Outcome:** Agents focus on resolving cases; managers get oversight without needing Admin access.

**7. Roles**

* **Action:** Define hierarchy:
  + Agent → Team Lead → Support Manager → Admin.
* **Outcome:** Case visibility flows upward → managers automatically see their team’s cases.

**8. Permission Sets**

* **Action:**
  + “Sentiment Dashboard Access” → Assigned to managers.
  + “Integration Access” → Assigned to developers handling WhatsApp/Chatbot setup.
* **Outcome:** Flexible security → extra access given without modifying base profiles.

**9. Org-Wide Defaults (OWD)**

* **Action:**
  + Cases = **Private** → Only owner/assigned agent can see.
  + Knowledge Articles = **Public Read Only** → All agents can access solutions.
* **Outcome:** Data confidentiality maintained, but knowledge base remains shareable.

**10. Sharing Rules**

* **Action:**
  + Auto-share **High Priority Cases** with Support Managers.
  + Share **WhatsApp Cases** with Social Media team.
* **Outcome:** Critical cases are escalated automatically to the right people.

**11. Login Access Policies**

* **Action:**
  + Restrict login by **IP Range** (e.g., company office IPs only).
  + Set **session timeout = 30 minutes idle**.
* **Outcome:** Increases data security and prevents unauthorized access.

**12. Developer Org Setup**

* **Action:** Register for a **Salesforce Developer Org** (free).
  + Install required packages (Twilio, Digital Engagement, Einstein Bots).
  + Enable Developer Hub & Scratch Orgs.
* **Outcome:** Ready-to-use environment for building and testing integrations.

**13. Sandbox Usage**

* **Action:**
  + **Developer Sandbox** → For coding LWCs, Apex triggers.
  + **Partial Copy Sandbox** → For testing with sample customer data.
* **Outcome:** Clear separation of development and testing ensures stable deployment.

**14. Deployment Basics**

* **Action:**
  + Use **Change Sets** (for Admin configs) → Profiles, OWD, Workflows.
  + Use **SFDX CLI + VS Code** (for Developer work) → LWCs, Apex classes.
* **Outcome:** Structured deployment process → reduces errors when moving to Production or Demo Org.