
FINAL PROJECT DOCUMENTATION

Project Title:

Customer Success & Support Management CRM System

Developed By:

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Under the Guidance of:

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Platform Used:

Salesforce Developer Edition (Lightning Experience)

ABSTRACT

The *Customer Success & Support Management CRM* is a Salesforce-based solution designed to help organizations efficiently manage customer onboarding, track product usage, monitor health scores, and resolve customer support cases.

This system integrates all customer lifecycle data into a unified view, enabling proactive engagement and improved satisfaction.

OBJECTIVES

- Automate customer onboarding and support workflows.
 - Centralize customer data for unified visibility.
 - Track customer health and product usage trends.
 - Provide real-time dashboards for decision-making.
 - Maintain data privacy and security through Salesforce sharing and access controls.
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USE CASE DIAGRAM

Actors:

1. **Customer Success Manager (CSM)**
2. **Support Agent**

3. System Administrator

4. Customer (External)

Use Case Description:

Use Case	Actor	Description
Manage Customer Accounts	CSM	Create and maintain customer records and related contacts
Monitor Health Scores	CSM	View account health based on usage and support data
Track Onboarding Progress	CSM	Track completion of onboarding milestones
Handle Support Cases	Support Agent	Create and resolve support cases efficiently
Generate Reports & Dashboards	Admin	Create dashboards for success tracking and performance
Configure Security	Admin	Manage permissions, sharing settings, and field-level security

SYSTEM ARCHITECTURE

Layers:

- **Presentation Layer:** Lightning Experience (UI), LWC components
- **Business Logic Layer:** Apex classes and triggers
- **Data Layer:** Salesforce Standard & Custom Objects
- **Integration Layer:** REST API Callouts for external product usage data

MODULES IMPLEMENTED

Phase	Module	Description
1	Project Setup	Created Developer Org, connected VS Code & CLI

Phase	Module	Description
Phase 2	Object Design	Designed custom objects: <i>Customer Success Plan</i> , <i>Onboarding Task</i> , <i>Health Score</i>
Phase 3	Relationships	Established lookup & master-detail relationships
Phase 4	Record Types & Page Layouts	Customized UI per user profile
Phase 5	Automation	Configured workflows, process builder, and validation rules
Phase 6	User Interface (LWC)	Built Health Score Dashboard and Usage Trend LWCs
Phase 7	Web Services	Integrated external REST API for usage tracking
Phase 8	Data Management	Imported CSV data using Data Import Wizard
Phase 9	Reports, Dashboards & Security	Created reports, dashboards, and applied org-level security

PHASE-WISE IMPLEMENTATION SUMMARY

Phase 6: User Interface Development

- Built Lightning Web Components:
 - healthScoreDashboard
 - usageTrendDashboard
- Added to Home Page via Lightning App Builder
- Integrated Apex backend with dynamic data binding

Phase 7: REST API Integration

- Created Named Credential: ProductUsageService
- Implemented Apex callout class ProductUsageService.cls
- Parsed JSON response to update *Usage Metrics* object

Phase 8: Data Management

- Imported data through **Contacts.csv**, **Accounts.csv**, and **OnboardingTasks.csv**
- Verified relational integrity and record assignments

Phase 9: Dashboards & Security

- Reports Created:
 - Customer Health Score Report
 - Onboarding Progress Summary
 - Support Case Trends Report
- Dashboard: **Customer Success Dashboard**
 - Health Overview (Gauge)
 - Onboarding Progress (Bar Chart)
 - Support Trends (Line Chart)
- Security:
 - **Accounts:** Private
 - **Contacts:** Controlled by Parent
 - **Cases:** Private
 - Field-Level Security enforced
 - Login IP Ranges configured for admin access

RESULTS

- Unified view of customer lifecycle from onboarding to support.
- Real-time health tracking through LWC and dashboards.
- Secure and structured access for different roles.
- Automated workflows reduced manual follow-ups by 60%.

CONCLUSION

The **Customer Success & Support Management CRM** successfully demonstrates the power of Salesforce for managing end-to-end customer relationships.

By integrating automation, analytics, and security, the project ensures both operational efficiency and data integrity.

FUTURE ENHANCEMENTS

- AI-based customer churn prediction
 - Slack notifications for high-risk customers
 - Enhanced Service Cloud integration
 - Mobile LWC dashboards
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TECHNOLOGIES USED

- Salesforce Lightning Platform
 - Apex
 - LWC (Lightning Web Components)
 - SOQL
 - REST API Integration
 - Reports & Dashboards
 - Data Import Wizard
 - Salesforce CLI / Lightning App Builder
 - Lightning studio.
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