Customer Support Helpdesk Project

Problem Statement – Customer Support Helpdesk

Overview
The client organization is experiencing growing difficulties in managing customer complaints and service requests due to outdated, manual methods. Processes are largely dependent on emails, phone calls, and spreadsheets, which often result in inefficiencies, poor tracking, and inconsistent communication.

Key Challenges

1. **Operational Inefficiency** – Without an automated system, case assignment and resolution are slow and error-prone. Support agents lack visibility into pending tasks, leading to delays and unresolved issues.

2. **Customer Dissatisfaction** – Customers frequently face delays in responses and have no simple mechanism to monitor the progress of their cases. This inconsistency erodes trust and overall satisfaction.

3. **Limited Managerial Insights** – Management is unable to monitor real-time service performance, resolution timelines, or escalation patterns due to the absence of dashboards and structured reporting.

4. **Escalation Risks** – Cases breaching SLA timelines often go unnoticed until escalated externally, which damages brand reputation and increases churn risk.

Proposed Solution
To address these issues, the project will implement a **Salesforce-based Customer Support Helpdesk**. The solution will centralize complaint management, automate case routing, and provide SLA-driven escalations. Customers will benefit from timely updates, while managers will gain actionable insights through performance dashboards and analytics. By streamlining service workflows, the platform will enhance operational efficiency, strengthen customer trust, and support better decision-making across the organization.

Phase 1: Problem Understanding & Industry Analysis

🔹 Requirement Gathering

- Collect business needs: tracking customer issues, assigning agents, ensuring timely resolution, and monitoring service quality.

- Identify must-have features:
  - case logging
  - automated case assignment
  - escalation rules
  - SLA tracking, and reporting.

🔹 Stakeholder Analysis

- **Customers** → Raise complaints, receive timely updates.
- **Support Agents** → Get case assignments, track and resolve efficiently.
- **Managers** → Monitor performance, escalations, and resolution times.
- **Admin** → Ensure system security, stability, and integrations.

🔹 Business Process Mapping

- **Process Flow:**
  Customer logs case → Auto-assigned to agent → Agent resolves or escalates → Customer notified → Case closed with feedback → Manager reviews via dashboard.

🔹 Industry-Specific Use Case Analysis

- In customer service, complaints vary by industry but share common needs: timely response, clear tracking, and proper escalation.
- So, we need to log cases centrally, auto-assign them to agents, escalate overdue cases, and notify customers at each stage.

🔹 AppExchange Exploration

Relevant Apps to Explore:

- **Case Management Tools** → Enhance service workflows.
- **SLA & Escalation Apps** → Monitor deadlines and escalations.
- **Survey/Feedback Apps** → Collect customer satisfaction ratings.
- **Integration Tools** → Connect email, chatbots, or CTI with Salesforce.

Phase 2: Org Setup & Configuration

🔹 Salesforce Editions

- The project uses **Developer Edition (Enterprise-level features)**, which includes Service Cloud functionality such as:
  - **Case Management** (core to the Helpdesk).
  - **Assignment Rules & Escalation Rules**.
  - **Reports and Dashboards**.
  - **Knowledge (if enabled)** for agent support.

🔹 Company Profile Setup

- **Setup → Company Information**:
  - Organization Name: Customer Support Helpdesk.
  - Default Locale: English (India).
  - Default Time Zone: Asia/Kolkata.
  - Default Currency: INR.

- Ensures **consistent reporting and data alignment** across the org.

🔹 Business Hours & Holidays

- **Setup → Business Hours**:
  - Business Hours created: Support Hours → Mon–Fri, 9 AM – 6 PM.
- **Setup → Holidays**:
  - Added Independence Day (Aug 15) and Republic Day (Jan 26).
- These settings are applied to **Case Escalation Rules** and **Milestones (SLA tracking)**.

🔹 Fiscal Year Settings

- **Setup → Fiscal Year**:
  - Standard Fiscal Year enabled (April–March).
- Used for **reporting consistency** and **business alignment**.

🔹 User Setup & Licenses

- **Setup → Users → New User**:
  - Created Admin, Manager, and Agent user accounts.
  - **License:** Service Cloud User (full features for cases, reports, dashboards).
- Example:
  - User: Agent1, Profile: Support Agent, Role: Agent, License: Service Cloud.

🔹 Profiles

- **Setup → Profiles**:
  - System Administrator → Full access.
  - Support Agent Profile → Based on Standard User; access to Cases, Contacts, Knowledge.

    - Manager Profile → Case supervision, reporting, dashboard visibility.

🔹 Roles

- **Setup → Roles → Set Up Roles**:
    - Role hierarchy:
        - Admin (top).
        - Manager (view cases owned by agents).
        - Agent (only own cases).
- Ensures **role-based data visibility**.

🔹 Permission Sets

- **Setup → Permission Sets**:
    - Knowledge_Access: Grants Knowledge object access to agents.
    - Feedback_Access: Grants access to custom Feedback__c object.
- Applied to users without modifying their Profiles.

🔹 OWD (Organization-Wide Defaults)

- **Setup → Sharing Settings**:
    - Cases: Private.
    - Contacts: Controlled by Parent.
    - Accounts: Public Read Only.
- Ensures **data confidentiality while maintaining access for managers**.

🔹 Sharing Rules

- **Setup → Sharing Rules**:
    - Cases shared with the Manager role for visibility.

    - Public Groups created for regional support teams.

🔹 Login Access Policies

- **Setup → Login Access Policies**:
    - Enabled Admins to log in as any user for troubleshooting.
    - Password policy: 8+ characters, complexity enabled, 90-day expiry, lockout after 5 attempts.

🔹 Dev Org Setup

- Used a **Developer Org** as the build environment.
- Created multiple test users (agents, managers, customers).
- Loaded sample **Contacts and Cases** for testing.

🔹 Sandbox Usage

- In enterprise settings, Sandboxes (Dev, Test, UAT) are used.
- For this project: Developer Org simulates both development and testing.

🔹 Deployment Basics

- VS Code + Salesforce CLI (`sf`) used for deployment.
- GitHub connected for version control:
    - Retrieve changes → Commit → Push → Deploy.