

# University Helpdesk CRM with Agentforce

## Phase 1: Problem Understanding & Industry Analysis

### Project Title

University Helpdesk CRM with Agentforce

### Industry

Higher Education

### Target Users

Students, Helpdesk Staff, Department Staff (IT, Finance, Exams, Hostel), University Admins

### 1. Problem Statement

Universities handle thousands of student queries daily in areas like fees, exams, hostel, registration, and IT support.

In the current system:

- Responses are delayed due to manual email/phone handling.
- Staff spend time on repetitive FAQs (e.g., fee due dates, exam schedules).
- No centralized ticket system exists, leading to duplicate or missed issues.
- Support is limited to office hours.

Goal:

To implement a Salesforce-native Helpdesk CRM (built entirely on Developer Org features) that:

- Provides 24/7 AI-powered FAQ responses using Agentforce.
- Creates Cases automatically when the chatbot cannot resolve a query.
- Routes Cases to the correct department using Case Assignment Rules and Queues.
- Enables staff to resolve Cases efficiently via Service Console and Knowledge.
- Collects student feedback after Case closure.

### 2. Requirement Gathering

- **Students:** Get instant answers to FAQs, raise support tickets (Cases), and track resolution progress.
- **Helpdesk Staff:** Reduce repetitive workload through chatbot deflection and resolve Cases faster with Knowledge, Quick Text, and Macros.
- **Departments (IT, Finance, Exams, Hostel):** Receive Cases relevant to their area via Queues and monitor workload distribution.

- **University Administration:** Access dashboards for case volume, resolution times, and satisfaction trends.

### 3. Stakeholder Analysis

- **Primary Users:** Students (via Experience Cloud + Chatbot)
- **Secondary Users:** Helpdesk Agents, Department Staff (IT/Finance/Exams/Hostel)
- **Decision Makers:** University Administration / IT Heads

### 4. Business Process Mapping

#### Current Process:

- Student emails/calls the helpdesk.
- Staff manually note the issue and forward it to the department.
- No proper tracking, leading to delays.

#### Proposed Salesforce Process:

- Student interacts with the Agentforce chatbot on Experience Cloud.
- Chatbot resolves FAQ via Knowledge Articles.
- If unresolved → Chatbot triggers a Flow → Creates a Case.
- Case Assignment Rules → Route to the correct department Queue.
- Agent resolves the Case in the Service Console with Knowledge support.
- Post-closure → A feedback survey Flow stores a rating in a Feedback object.

### 5. Industry-Specific Use Case Analysis

The Higher Education sector increasingly uses CRMs to improve student support.

Best practices include:

- AI chatbots for FAQs (exam dates, fee deadlines).
- Case management for unresolved issues.
- Dashboards for management insights.

Using a Developer Org setup ensures scalability within free Salesforce limits.

### 6. AppExchange Exploration

- Survey Force (Free) – for capturing student feedback.
- Agentforce Starter Templates – to accelerate chatbot setup.
- Standard Knowledge & Case Management – for FAQs and ticket tracking.

# Phase 2: Org Setup & Configuration

## Project

University Helpdesk CRM with Agentforce

## Scope

Salesforce Developer Org

### 1. Objective

To configure the Salesforce Developer Org for the University Helpdesk CRM, ensuring correct company settings, users, roles, profiles, queues, and case assignment rules for Phase 2.

### 2. Implemented Features

#### A. Company Profile Setup

- Changed Organization Name → University Helpdesk CRM.
- Set Time Zone → (GMT+05:30) India Standard Time.
- Configured Business Hours → University Hours (9:00 AM – 6:00 PM).

#### B. Users, Roles & Profiles

Role Hierarchy Created:

- University Admin
- Helpdesk Agent
- IT Staff
- Finance Staff
- Exam Staff
- Hostel Staff

Users Created: IT Staff, Finance Staff, Exam Staff, Hostel Staff, Helpdesk Agent.

Custom Profile (Helpdesk Staff): Cloned from Standard User, with access to Cases & Knowledge.

#### C. Queues & Case Assignment Rules

- **Queues Created:** IT, Finance, Exam, Hostel (Case object assigned).
- **Case Category Field:** New Picklist field on Case → values: IT, Finance, Exam, Hostel.
- **Assignment Rule Configured:**
  - If Case Category = IT → Assign to IT Queue.
  - If Case Category = Finance → Assign to Finance Queue.
  - If Case Category = Exams → Assign to Exam Queue.

- If Case Category = Hostel → Assign to Hostel Queue.

### **3. Outcome**

- Company Profile configured with correct timezone & business hours.
- Users, Roles, and Profiles defined for university staff.
- Queues + Assignment Rules implemented → Cases now auto-route to the correct department queue.

With Phase 2 complete, the org is ready for Phase 3: Data Modeling & Relationships.