

SALESFORCE PROJECT

PROJECT TITLE: AI-Powered Smart Case Routing

PROBLEM: Customer support teams face challenges in efficiently prioritizing and routing cases. Manual triage causes delays, dissatisfied customers, and poor SLA compliance.

Phase 1: Problem Understanding & Requirement Analysis

A) Requirements

Analyze case description using external **AI Sentiment API (Hugging Face)**.

Auto-populate **Sentiment__c** field with values: Positive, Neutral, Negative.

Use **Priority_Level__c** field to combine sentiment + urgency.

Route **High Priority + Negative** cases → Senior Support Queue + notify Manager.

Route other cases → Junior Support Queue.

Provide **Reports & Dashboards**:

- Case distribution by sentiment

- Case trends by priority level

- Escalated cases overview

Allow role-based access:

- Agents** → See only their assigned cases

- Managers** → See all cases + dashboards

- Admins** → Full org setup and control

Version control + deployment via **Salesforce CLI + GitHub**.

B) Stakeholders & Responsibilities

Primary:

Support Manager — case escalations, dashboards, SLA monitoring.

Senior Support Agents — handle escalated/negative/high-priority cases.

Junior Support Agents — manage standard/positive/neutral cases.

System Administrator — setup org, security, flows, API integration.

Developers — implement Apex classes, triggers, test automation.

Secondary:

Operations — track SLAs, ensure business hours & holidays are configured.

Customer Success — monitor sentiment trends for CX improvements.

Executive Sponsor — oversee ROI and project success.

C) Business Process (Case → Sentiment → Routing → Resolution)

Case Creation: Customer submits a case (email, web, phone).

Sentiment Analysis: Trigger calls Hugging Face API → populates Sentiment__c.

Routing Decision: Flow checks Sentiment + Priority.

If Negative + High Priority → Assign to **Senior Queue** + notify Manager.

Else → Assign to **Junior Queue**.

Resolution: Agent works on case, updates status.

Reporting: Case metrics updated in dashboards for Manager visibility.

D) Industry-Specific Use Case Analysis

Use Case 1 — Escalation of Urgent Complaint

Actors: Customer, Senior Agent, Manager

Flow:

Customer submits complaint → System analyzes text as *Negative* → Priority = High → Flow assigns case to Senior Queue → Manager gets email alert.

Acceptance Criteria: Case correctly routed to Senior Queue, Manager notified within 1 minute.

Use Case 2 — Routine Positive Feedback

Actors: Customer, Junior Agent

Flow:

Customer submits positive feedback → Sentiment detected as *Positive* → Case assigned to Junior Agent → No escalation needed.

Acceptance Criteria: Case appears in Junior Queue within 1 minute, no manager alert triggered.