**UOP Customer Call Center Management**

Project ID: HSM\_825

Project Design Document

Document ID: HSM\_825\_DD

# Table of Contents

[1 Table of Contents 2](#_Toc390766589)

[2 Project Requirements 3](#_Toc390766590)

[2.1 Objectives 3](#_Toc390766591)

[2.2 Current Situation 3](#_Toc390766592)

[2.3 Scope 3](#_Toc390766593)

[3 Design 4](#_Toc390766594)

# Project Requirements

## 2.1 Objectives

UOP Lifecycle Business Solution has been tasked to establish the Business Operations functions, processes and technology to execute a profitable Aftermarket and Services business for UOP. As part of that they are looking to setup customer case management process for UOP external customers and want to leverage the UOP Customer Portal as the front end interface integrated with SFDC for case history logging and accounts, contact and opportunity database.

The Phase 1 project is for prototype and will leverage the UOP Portal for logging customer service requests for selected segment of customers integrated with SFDC Cases to retain all information for customer service request.

## 2.2 Current Situation

* Ask an Expert is an existing form in the portal, for the customers to raise cases.
* Currently, only status of the cases is shown to the customers.
* Email to case functionality is not available to create cases.
* Salesforce for Outlook is not available to create cases.
* Child and Parent cases hierarchy is not available in the portal.

## 2.3 Scope

* Setup UOP Customer Portal for logging customer service request.
* Create Service Request Template on UOP Portal for customers to log all UOP Service requests
* Integrate UOP portal with SFDC to track service request in SFDC cases from web and email contact.
* Enable Web and Email to case creation in SFDC
* Setup access for tech service agent to pull account type, billing address, Service agreement status, PPG status, Service entitlement like CPS from SDFC
* TS and RS Service teams will update the case history for every service request logged till closure.

## 2.4 Design

**UOP Customer Service Request Form (Visualforce Page)**

**UOP Portal**

**Cases**

**Generic Email Box**

**(Email to case)**

**Salesforce for Outlook**

1. New UOP Portal Customer Service Request form fields.

Form fields

* **Facility**: Customer Name + City (comma-separated) – mandatory
  + Pre-populated by system per registered user login
* **Process Unit –** populated per SFDC Account selected –mandatory; add “Other” in the drop-down
* **Sub-Component (CPS) –** to be displayed if “CPS” sub-component marked at the Process Unit
* **Question Subject** - mandatory
* **Question Description** – mandatory
* **Respond By Date**
* **Attachment**

**Technical Design:**

* 1. Create a visualforce page and a controller to input the above fields.
  2. Once the visualforce page form is filled out by the customers and submitted, a case will be auto created in the Salesforce based upon the customer’s login information with the matching active contact. Case Trigger is used to match the existing contact with the customer login information.
  3. If the “Operations / Technical Service” field = “Yes” on SFDC Contact; and Customer Service Request” field checked on SFDC Account (new field to be added) then the Customer Service request tile should be exposed to the customers.
  4. The cases created by the customer will be displayed at the bottom section with the following fields and the filters applied with the last 6 month cases in the controller query,
  + Status (Open / Closed)
  + Customer Request Submitted Date
  + Resolution Date
  + Subject
  + Description
  + Resolution – to be exposed for only Closed cases
  1. Edit functionality will be available in the Portal using the controller logic.
  2. Button/link will be provided in the portal for the customers to reopen the case.
  3. Child cases related to the parent case will be displayed in the bottom section by fetching the results from the controller with the above field information’s.
  4. Manually created cases in the Salesforce for the customer, will also be displayed at the bottom section along with the cases that are submitted form the portal.
  5. Create a workflow to send the notifications based upon the case creation. Case status changes and reassignments.
  6. Provide visualforce page, apex class permissions to the user profiles. Get list of profiles from support team/Irene.



1. SFDC case form fields

**Technical Design:**

* 1. Implement only to the UOP Service Request record type.
  2. Remove the *CCM Case ID* field form the UOP Service Request layout.
  3. Auto-populate the fields based upon the customer information. Case trigger is used to auto populate the fields based upon the contact details from Salesforce.
* *Case Owner*
* *Date Recorded*
* *Case Record Type*
* *Account Name*
* *City*
* *Country*
* *State*
* *Contact Name*
* *Process Unit*
* *Unique ID*
* *Application Group*
* *Process Type*
* *Process Unit Status*
* *Process Unit Other*
* *Subject*
* *Description*
* *Priority (default = “Medium”)*
* *Severity (default = “Level 1 – Resolved by Owner”)*
* *Case Origin*
* *Customer Request Submitted Date*
* *Customer Due Date (if provided by Customer)*
* *Internal Request (default = unchecked)*
* *Retention Code (default = “SAL155”)*
* *Retention Start Date*
* *Retention Status (default = “Retention Hold”)*
* *Retention Period (default = “Modified Date + 20 years”)*
* *Retention End Date*
  1. Create the following fields in the Salesforce Account object
* *Budgeted Hours”*
* *“Use Hours”*
* *“Customer Service Request” – Yes / No*
  1. Remove the Ask and Expert field form the Process Unit form
  2. Modify the following Case Origin picklist values as below – Remove those marked in *red*; historical records – do not update
* *CCR*
* *Customer*
* ***Email***
* *External Audit*
* *Field Marketing*
* *Internal Audit*
* *LAB / R&D*
* ***Phone Call***
* *Plant*
* *Salesperson*
* *SFDC User*
* *Supply Chain*
* *Technical Chemist*
* *Technical Service*
* *Technical Support team*
* *UOP Training Website*
* *User Logged ISSUE*
* ***Web = UOP Customer Portal + UOP Training website (or uop.com)***
* *Other*
* *Other customer communication*
* ***Manual = all except c, h, r***
  1. Provide field permission to the newly created fields to the user profiles. Get list of profiles from support team/Irene.

1. Email to Case.

* Email is to be sent to generic mailbox. In ph.1 this mailbox address will be provided to the restricted list of the POC external participants; all of them must be active Contacts in SFDC.
* If email received from not active Contact, it will be forwarded to Op Center queue to follow with external customer getting missing info and creating active Contact in SFDC if needed
* Generic mailbox name - TBD
* Consider having multiple generic mail boxes, e.g. separate for different customer domains, in next phases
* When Customer replies to a notification about a case created per his request, system should apply his reply email body to the case Description field. (when customer hits “Reply” the email should be sent to the generic email address)
* If UOP Service user gets email from customer in his personal work mailbox (@honeywell.com or @uop.com), he needs to forward the email to Op Center rep who will:
* Either creates a Case manually and attaches the email to this case.
* Or use Salesforce For Outlook (SFO) – case is auto-created – see Appendix 5
* Pre-requisite: user needs to install SFO on his machine
* Not working from mobile (iPhone / iPad)
* Case created from email will be missing next mandatory fields – to be filled by service agent when following on the case:
* Customer Due Date;
* either Process Unit or Process Unit Other

**Technical Design:**

* 1. Implement the Email to case to create a generic email box service address. If the active contact is available, then the case should be assigned based upon the assignment rules or the case should be assigned to the OP center Queue.
  2. Use the thread id to update the case with the email reply. Thread id has to be added in the email templates and email to case functionalities.
  3. Create an Outlook configuration in the Salesforce. Install the Salesforce for Outlook using the admin request. Agents have to click on the case and then click on the Create Case button in the outlook to create a case in Salesforce.
  4. Agent will manually create a case for the customer in the Salesforce.
  5. Create a trigger to auto populate the fields once the case is created in the slaesforce.

1. Case Assignment Rules

Case can be assigned to an individual or a queue. Queue is just a list of individuals – all of them receive notification when a case is created or re-assigned

**Technical Design:**

* 1. Create a queue named as OP Center Queue. (Names list will be shared by Irene).
  2. Create assignment rules based upon the following conditions,

|  |  |
| --- | --- |
| **Case Origin** | **Assignment (Case Owner)** |
| **Manual** | Case creator (Case Owner = Created By) |
| “Customer Service Request” (UOP **Portal**) | Assign to “Op Center” queue; then manual routing ( to RSM) |
| “Customer Service Request”– **CPS** sub-component selected | CPS Services Manager of its Account; if blank – then Paul Kowalczyk |
| Email – **generic mailbox** | Assign to “Op Center” queue; then manual routing ( to RSM) |

* 1. Create a view for the OP center Queue in the cases object.

1. Service Console Layout modifications.

* Layouts to be modified for,
* Account
* Contact
* Process Units
* Cases

**Technical Design:**

* 1. Create custom console components for the Account, Contact, Process Units and Cases layout. (Page Layouts for Account, Contacts, Process Units and Case has to be confirmed by Irene).

1. Reports and Dashboards

**Technical Design:**

* 1. OOB Salesforce report to show cases status (open / closed)
  2. OOB Salesforce report to show case origin
  3. OOB Salesforce report to show cases assignment
  4. OOB Salesforce to display the Contacts created by Op Center reps (Last Modified By)
  5. OOB Salesforce report to show cases where we say “No”; standard work process TBD
  6. OTTR reports:

[OTTR Response Time](https://hon-pmt.my.salesforce.com/00O800000042ObA)

[Service Request – Late](https://hon-pmt.my.salesforce.com/00O80000005UZvz) (what Reason code was used if [Resolution Date]>[Customer Due Date]).