CUSTOMER FEEDBACK CRM – COMPLAINT & RESOLUTION TRACKER

Project Overview

- CRM to log complaints and feedback
- Automatic assignment to support team
- Status tracking: Pending, In Progress, Resolved
- Manager dashboards & reports

Project Goal & Objectives

Goal: Streamline complaint management and improve accountability

Objectives:

- Faster complaint resolution
- Automated notifications
- Easy monitoring for managers

Stakeholders

Customers: Submit complaints

Support Team: Resolve complaints

Managers/Admins: Track trends & reports

IT/Admins: Maintain system

Custom Fields & Case Object

Standard Object: Case

Custom Fields added:

- Complaint Type (Picklist)
- Status (Picklist)
- Customer Feedback (Text Area)
- Assigned Agent (Lookup User)

Purpose: Track complaints, assign agents, monitor status

Lightning App & Tabs

App Name: Customer Feedback CRM

Added navigation items: Cases, Reports, Dashboards, Users

Case Tab: Access all complaints, show custom fields

Users, Profiles & Roles

Users: Admin, Support, Manager

Profiles: Admin (all access), Support (assigned cases), Manager (all cases)

Roles & Sharing: OWD Private, sharing rules for manager access

Automation & Validation

Validation Rule: Complaint cannot close without Resolution

Flows:

- Auto-assign new complaints to agent
- Notify support team via email
- Notify customer when complaint resolved

Future Enhancements

- Add Approval Process before closing complaints
- Custom Notifications for key events
- Integrate Chatbot / AI suggestions for faster resolution

THANK YOU ☺

Lets Go to org…