

PHASE 1: PROBLEM UNDERSTANDING & INDUSTRY ANALYSIS

1. Requirement Gathering

From the internal workflow at Smart CRM Solutions, the following needs were identified:

- Users escalate Salesforce-related issues through inconsistent channels.
 - No proper ticket traceability existed.
 - Manual tracking was time-consuming and error-prone.
 - Administrator needed a centralized tool to track requester details, department, priority, request type, and completion timelines.
 - Future enhancements require automation for notifications and approvals.
 - System must allow recording of admin notes and request descriptions.
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2. Stakeholder Analysis

Stakeholder	Role in Process	Key Expectation
System	Logs tickets, updates status,	Wants a clean dashboard and easy entry of requests
Administrator	resolves issues	
Internal User / Requester	Submits Salesforce-related change or issue	Wants updates on ticket progress
Approver (Optional)	Approves changes requiring authorization	Wants visibility of request, requester, and department
Management (Future)	Oversees productivity	Wants reporting and SLA tracking

3. Business Process Mapping

Current Problems:

- Unstructured request intake
- No status visibility
- Manual spreadsheet tracking
- Inefficient communication

Proposed Salesforce Process:

1. Administrator receives a Salesforce request.
 2. Admin logs it inside the Salesforce Ticket CRM.
 3. System stores requester details, department, priority, type, and request description.
 4. Admin updates ticket status as work progresses.
 5. Ticket moves through lifecycle: *New* → *In Development* → *Testing* → *Closed/Rejected*.
 6. Admin adds notes for internal documentation.
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4. Industry Use Case Analysis

Since this project belongs to **Internal Salesforce Support Team**, the CRM acts as an **IT Helpdesk solution**. Internal ticketing systems improve operational efficiency, reduce delays, and ensure transparent communication.

Common industry standards include:

- Ticket auto-numbering
- Request metadata tracking
- Status lifecycle
- Priority classification
- Rich text descriptions
- Admin notes

This project implements these foundational components.

5. AppExchange Exploration (Mentioned as part of guidelines)

Researched Service Ticketing Apps in AppExchange such as:

- Service Cloud Case Management
- Internal Helpdesk Ticketing Systems
- Project & Task Management apps

These apps helped shape:

- Field structure
- Ticket lifecycle
- Suggested metadata collection (priority, requester, department)

