

### 1. Introduction

#### Overview

Easy CS is a lightweight Customer Success (CS) application designed for small businesses using Salesforce. It offers a structured starting point for companies looking to organize their CS processes without the complexity or cost of enterprise solutions. While not a feature-complete CS platform, Easy CS includes the fundamental components necessary to manage customer relationships, such as account tracking, engagements, and success tasks.

The app was created to fill the gap for small organizations that already use Salesforce to support post-sales operations but lack a native, free, or simple Customer Success solution in the ecosystem.

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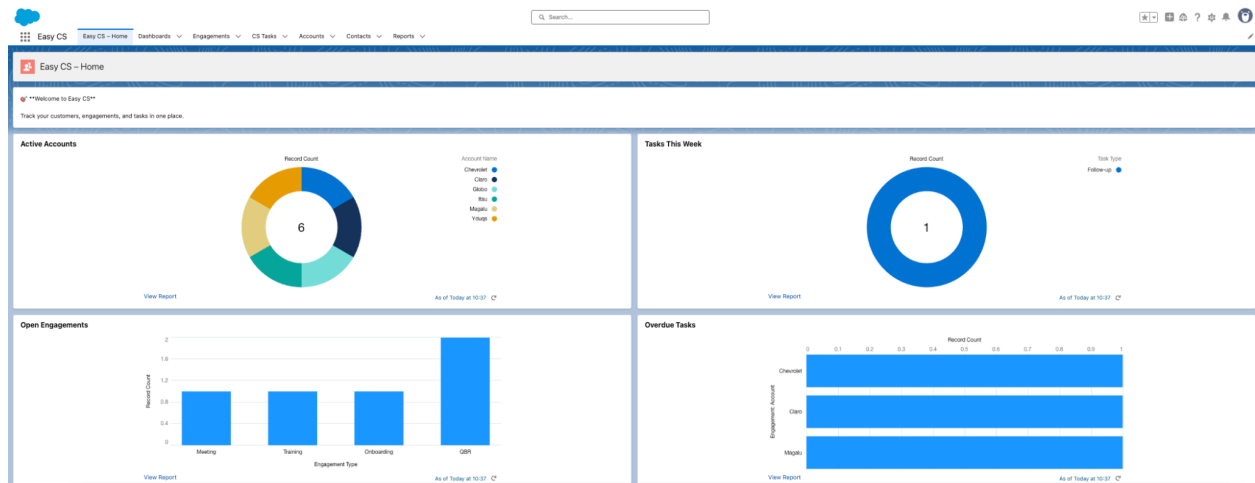
### 2. Home Page

#### Overview

The Easy CS Home Page provides a quick snapshot of your Customer Success operation through four charts:

- **Active Accounts** – donut chart showing the count of active customer accounts
- **Tasks This Week** – donut chart showing CS tasks due in the current week
- **Open Engagements** – bar chart displaying ongoing customer engagements
- **Overdue Tasks** – bar chart highlighting late tasks grouped by account

These visualizations give users an at-a-glance view of their CS workload and priorities for the week.



**Navigation Tip:** Users can click "View Report" under each chart to explore underlying data or customize the view based on filters.

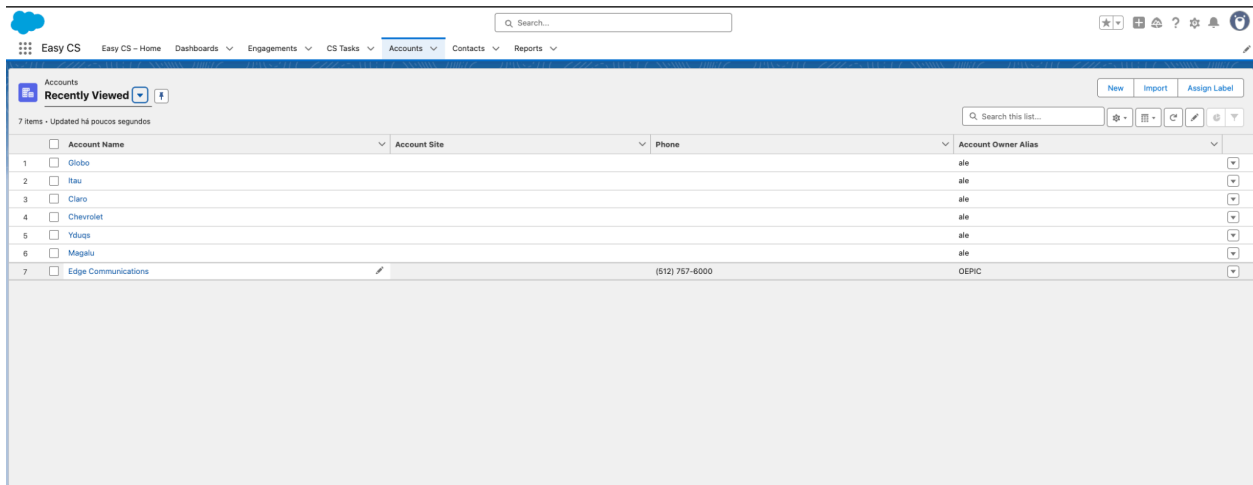
### 3. Managing Accounts

#### Overview

The Accounts tab is where you register your customers and manage key details about each relationship. Accounts represent the companies you serve and act as the central hub for related engagements, tasks, and contacts.

#### List View

The default list shows recently viewed accounts, with columns like Account Name, Phone, and Account Owner Alias. You can customize list views, apply filters, or sort records as needed.



The screenshot displays the 'Accounts' tab interface. At the top, there's a navigation bar with 'Easy CS' and various menu items like 'Dashboards', 'Engagements', 'CS Tasks', 'Accounts', 'Contacts', and 'Reports'. A search bar is also present. Below the navigation bar, the 'Accounts' section is active, showing a 'Recently Viewed' filter. The table lists 7 items, each with a checkbox, an account name, a site, a phone number, and an owner alias. The first six items are 'Globo', 'Itau', 'Claro', 'Chevrolet', 'Yduqs', and 'Magalu', all with 'ale' as the owner alias. The seventh item is 'Edge Communications' with the phone number '(512) 757-6000' and 'OEPIC' as the owner alias.

	<input type="checkbox"/> Account Name	<input type="checkbox"/> Account Site	<input type="checkbox"/> Phone	<input type="checkbox"/> Account Owner Alias
1	<input type="checkbox"/> Globo			ale
2	<input type="checkbox"/> Itau			ale
3	<input type="checkbox"/> Claro			ale
4	<input type="checkbox"/> Chevrolet			ale
5	<input type="checkbox"/> Yduqs			ale
6	<input type="checkbox"/> Magalu			ale
7	<input type="checkbox"/> Edge Communications		(512) 757-6000	OEPIC

## Creating a New Account

Click **New** to open the Account creation modal. Fill out the following fields:

- **Account Name** (required)
- **Parent Account** (if applicable)
- **Account Number**
- **Tier** (Strategic, Standard, or Basic)
- **Segment** (e.g., Media, Retail, Tech)
- **Contract Status** (Active, Inactive, or Pending)


Then click **Save**.

### New Account

\* = Required Information

#### Account Information

Account Owner

 Alexandre Siqueira

\* Account Name

Parent Account

Account Number

Tier

--None--

Segment

--None--

Contract Status

--None--

CancelSave & NewSave

## Account Details Page

Once saved, you'll be redirected to the Account detail page. This page shows the main fields, plus three related lists:

- **Engagements:** displays all CS activities linked to this customer
- **Contacts:** manage people associated with the company
- **Account Team Members:** assign other users to collaborate on the account

The screenshot displays the 'Account Details' page in a CRM application. The interface is divided into several sections:

- Header:** Includes the 'Easy CS' logo, navigation tabs (Easy CS - Home, Dashboards, Engagements, CS Tasks, Accounts, Contacts, Reports), a search bar, and user profile icons.
- Account Owner Section:** Displays the account owner's name, 'Alexandre Siqueira', and various fields for account details: Account Name, Itau, Parent Account, Tier, Strategic, Segment, Financial Services, Contract Status, and Active.
- Engagements (1) Section:** Shows a list of engagements. The first engagement is 'Incident Support' with the description 'Apio a incidente no atendimento de cartão de crédito'.
- AccountTeamMembers (1) Section:** Shows a list of team members. The first member is 'CSM' with the name 'Alexandre Siqueira'.
- Contacts (2) Section:** Displays a list of contacts. The first contact is 'Thais Araujo' (CMO) and the second is 'Camila Pimenta' (CIO).
- Post Section:** Includes a 'Share an update...' field, a 'Share' button, and a search bar for the feed.
- User Profile Section:** Shows the profile of 'Alexandre Siqueira' with a post titled 'Reunião com o cliente pós incidente FYL time - fizemos a reunião com o cliente depois do incidente.' and options to 'Like' or 'Comment'.

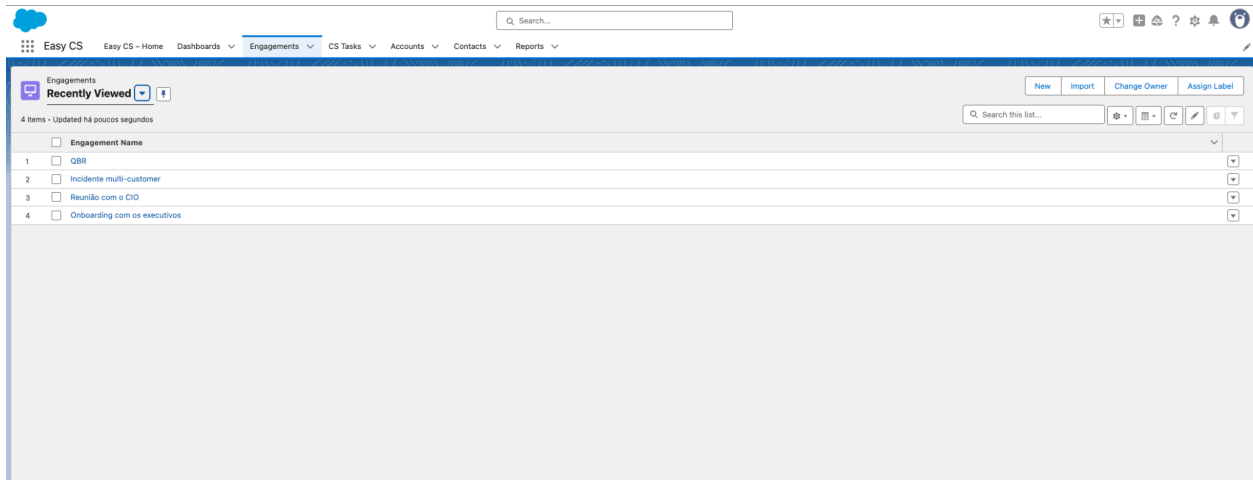
## 4. Managing Engagements

### Overview

Engagements represent any type of activity or interaction with a customer, such as onboarding meetings, executive check-ins, or incident handling. Each engagement is associated with an account and may include CS tasks and a collaboration team.

### List View

The Engagements tab lists your most recent customer interactions.



The screenshot shows the 'Engagements' tab in a CRM interface. The top navigation bar includes 'Easy CS', 'Easy CS - Home', 'Dashboards', 'Engagements', 'CS Tasks', 'Accounts', 'Contacts', and 'Reports'. A search bar is located on the right. The 'Engagements' section has a 'Recently Viewed' filter and a '+1' button. Below this, there are 4 items, with the last one updated 'há poucos segundos'. The table lists the following engagements:

	Engagement Name	
1	<input type="checkbox"/> QBR	▼
2	<input type="checkbox"/> Incidente multi-customer	▼
3	<input type="checkbox"/> Reunião com o CIO	▼
4	<input type="checkbox"/> Onboarding com os executivos	▼

## Creating a New Engagement

You can create a new engagement either from the Engagement tab or directly from an Account. Fields include:

- **Engagement Name** (required)
- **Account** (automatically filled if created from Account page)
- **Engagement Type** (e.g., QBR, Kickoff, Incident)
- **Engagement Date**
- **Engagement Status** (Planned, In Progress, Completed)
- **Notes**

The screenshot shows a 'New Engagement' modal form overlaid on a CRM interface. The form is titled 'New Engagement' and includes a red asterisk indicating required information. The fields are as follows:

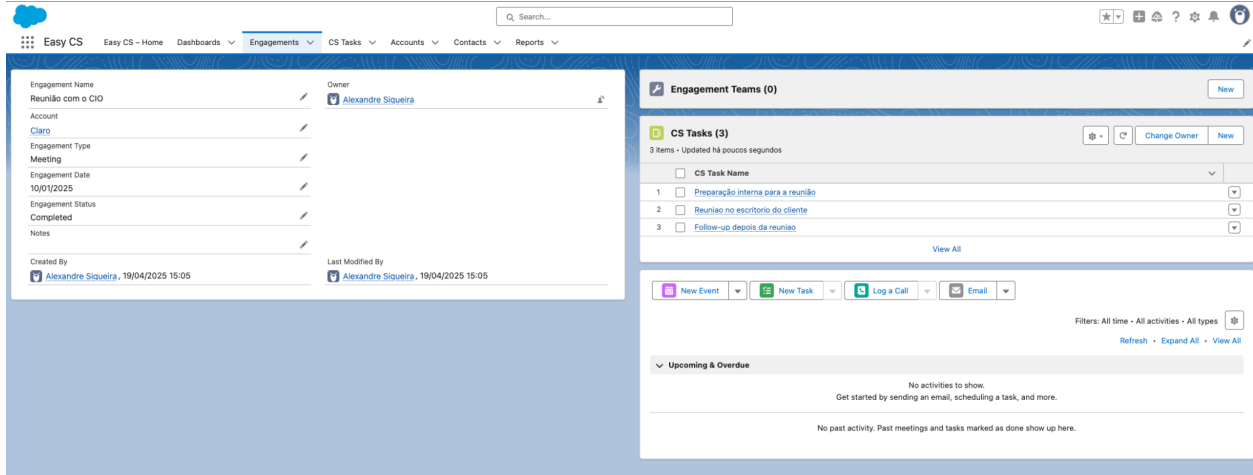
- Engagement Name:** A text input field with a red asterisk, currently containing a single character 'I'.
- Account:** A dropdown menu showing 'Claro' with a close button (X).
- Engagement Type:** A dropdown menu with '--None--' selected.
- Engagement Date:** A date picker icon.
- Engagement Status:** A dropdown menu with '--None--' selected.
- Notes:** A large text area for additional information.

At the bottom of the form are three buttons: 'Cancel', 'Save & New', and 'Save'. The background interface shows a sidebar with 'Easy CS' and 'Engagements' tabs, and a main area with 'Engagements (3)' and 'AccountTeamMembers (1)' sections.

## Engagement Detail Page

After saving, the detail page displays all engagement information, along with two key related lists:

- **CS Tasks** – specific tasks linked to this engagement
- **Engagement Team** – users collaborating on the engagement



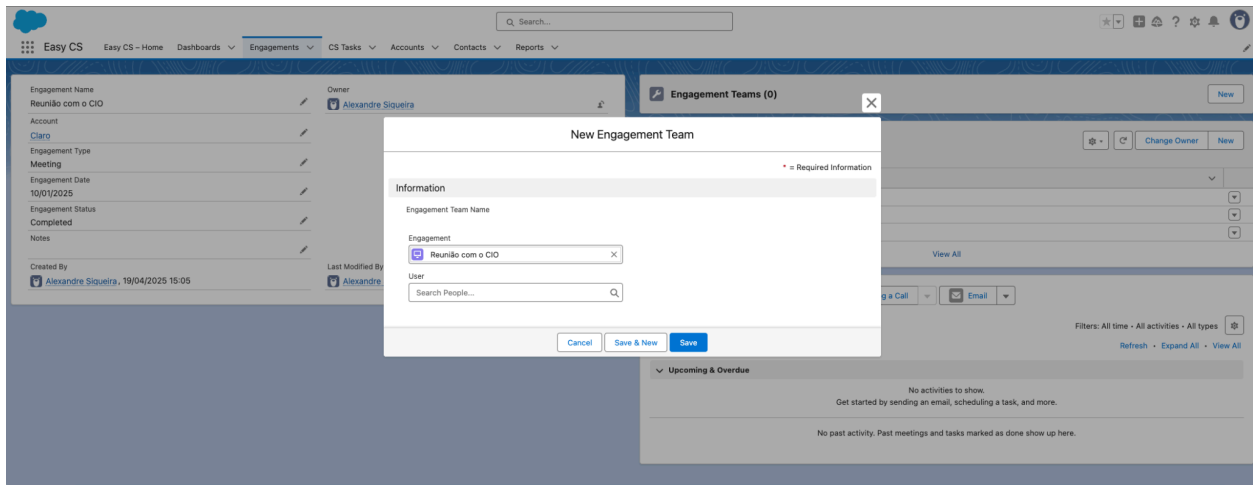
The screenshot displays the 'Engagement Detail Page' in the 'Easy CS' application. The interface is divided into several sections:

- Header:** Includes the 'Easy CS' logo, navigation links (Easy CS - Home, Dashboards, Engagements, CS Tasks, Accounts, Contacts, Reports), a search bar, and user profile icons.
- Engagement Information (Left Panel):**
  - Engagement Name:** Reunião com o CIO
  - Account:** Claro
  - Engagement Type:** Meeting
  - Engagement Date:** 19/01/2025
  - Engagement Status:** Completed
  - Notes:** (Empty field)
  - Created By:** Alexandre Siqueira, 19/04/2025 15:05
  - Last Modified By:** Alexandre Siqueira, 19/04/2025 15:05
- Engagement Teams (0):** A section for managing the engagement team, currently showing 0 members.
- CS Tasks (3):** A list of tasks associated with the engagement, updated 'há poucos segundos'. The tasks are:
  - 1. ☐ CS Task Name
  - 2. ☐ Preparação interna para a reunião
  - 3. ☐ Reunião no escritório do cliente
  - 4. ☐ Follow-up depois da reunião
- Activity Log:** A section for tracking activities, currently showing 'No activities to show. Get started by sending an email, scheduling a task, and more.' and 'No past activity. Past meetings and tasks marked as done show up here.'



# Adding Team Members

Use the **New** button under the Engagement Team related list to associate additional users.



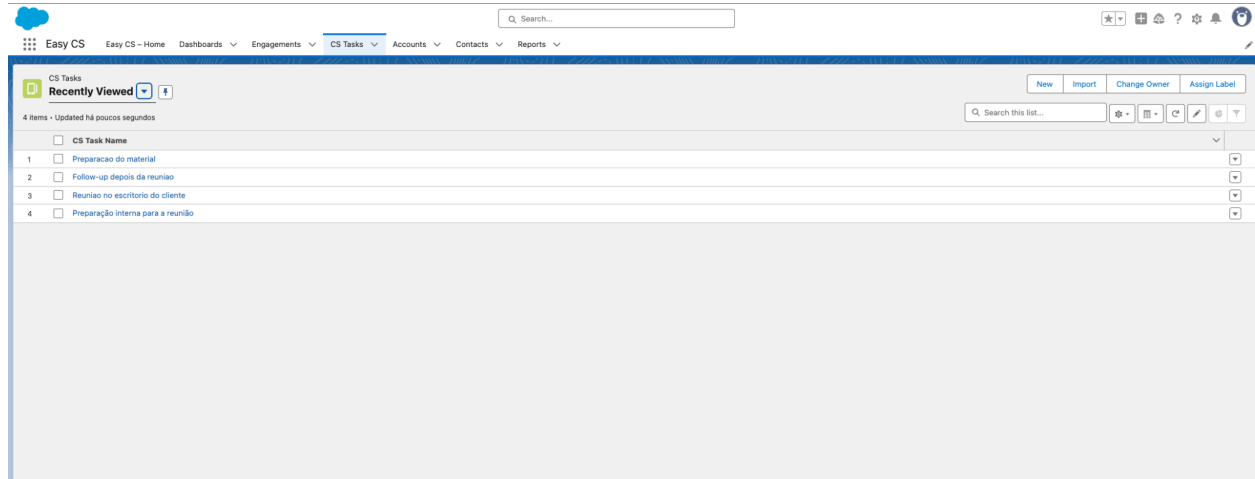
## 5. Managing CS Tasks

### Overview

CS Tasks are individual action items linked to an engagement. They help organize what needs to be done and by whom to ensure a successful customer interaction.

### List View

The CS Tasks tab shows a list of recently viewed items.



The screenshot displays the 'Easy CS' application interface. The top navigation bar includes a search bar and several menu items: Easy CS, Easy CS - Home, Dashboards, Engagements, CS Tasks (selected), Accounts, Contacts, and Reports. Below the navigation bar, the 'CS Tasks' section is active, showing a 'Recently Viewed' filter. The main content area displays a list of 4 items, updated a few seconds ago. The list contains the following tasks:

	CS Task Name	
1	<input type="checkbox"/> Preparacao do material	▼
2	<input type="checkbox"/> Follow-up depois da reuniao	▼
3	<input type="checkbox"/> Reuniao no escritorio do cliente	▼
4	<input type="checkbox"/> Preparação interna para a reunião	▼

## Creating a New CS Task

CS Tasks are usually created from within an engagement. Required fields include:

- **Task Type** (e.g., Internal, External)
- **CS Task Name** (required)
- **Priority** (High, Medium, Low)
- **Due Date**
- **Status** (Planned, In Progress, Completed)
- **Notes**

The screenshot shows the 'New CS Task' form within the Easy CS application. The form is titled 'New CS Task' and includes a search bar at the top. On the left, there is a sidebar with navigation links: 'Easy CS', 'Easy CS - Home', 'Dashboards', 'Engagements', and 'CS Tasks'. The main content area displays the form fields for creating a new task. The 'Task Type' dropdown is set to '--None--'. The 'CS Task Name' field is required and is currently empty. The 'Priority' dropdown is set to '--None--'. The 'Due Date' field is empty. The 'Status' dropdown is set to '--None--'. The 'Notes' field is empty. The 'Owner' is set to 'Alexandre Siqueira'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The background shows the engagement detail page for 'Reunião com o CIO'.

Once saved, tasks are displayed on the engagement detail page and contribute to dashboard metrics like overdue or weekly tasks.

## 6. Reports and Dashboards

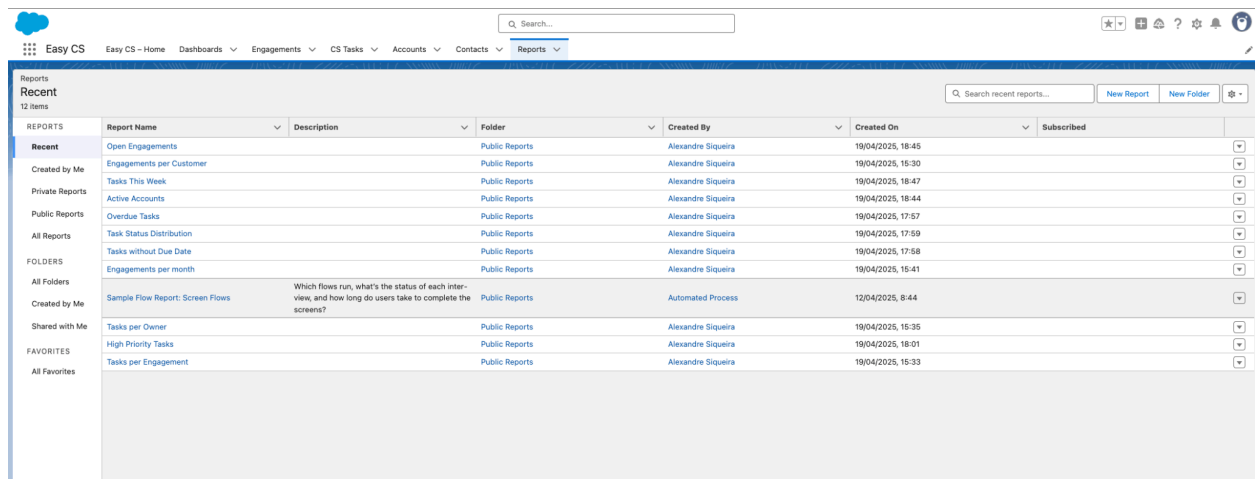
### Overview

Easy CS includes a set of reports and dashboards designed to give visibility into your customer success performance and activity tracking.

### Reports

The app includes pre-built reports like:

- **Engagements per Customer**
- **Open Engagements**
- **Tasks This Week**
- **Overdue Tasks**
- **Task Status Distribution**
- **Tasks without Due Date**
- **Engagements per Month**



The screenshot displays the 'Reports' section of the Easy CS application. The interface includes a top navigation bar with a search bar and various menu items. The main content area shows a list of reports under the 'Recent' tab. The reports are organized into a table with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports are categorized into 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Open Engagements		Public Reports	Alexandre Siqueira	19/04/2025, 18:45	
Created by Me	Engagements per Customer		Public Reports	Alexandre Siqueira	19/04/2025, 15:30	
	Tasks This Week		Public Reports	Alexandre Siqueira	19/04/2025, 18:47	
Private Reports	Active Accounts		Public Reports	Alexandre Siqueira	19/04/2025, 18:44	
Public Reports	Overdue Tasks		Public Reports	Alexandre Siqueira	19/04/2025, 17:57	
All Reports	Task Status Distribution		Public Reports	Alexandre Siqueira	19/04/2025, 17:59	
	Tasks without Due Date		Public Reports	Alexandre Siqueira	19/04/2025, 17:58	
FOLDERS	Engagements per month		Public Reports	Alexandre Siqueira	19/04/2025, 15:41	
All Folders						
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	12/04/2025, 8:44	
Shared with Me	Tasks per Owner		Public Reports	Alexandre Siqueira	19/04/2025, 15:35	
FAVORITES	High Priority Tasks		Public Reports	Alexandre Siqueira	19/04/2025, 18:01	
All Favorites	Tasks per Engagement		Public Reports	Alexandre Siqueira	19/04/2025, 15:33	

# Sample Report – Engagements per Customer

Groups engagements by customer, showing name, type, status, and date.

Easy CS

Easy CS - Home

Dashboards

Engagements

CS Tasks

Accounts

Contacts

Reports

Search...

Star

Print

Help

Settings

Profile

Report: Engagements with Account

Engagements per Customer

Enable Field Editing

Search

Add Chart

Filter

Export

Refresh

Total Records

4

Account: Account Name	Engagement Type	Engagement: Engagement Name	Engagement Status	Engagement Date
Claro (3)	Incident Support	Incidente multi-customer	Completed	18/03/2025
	Meeting	Reunião com o CIO	Completed	10/01/2025
	Onboarding	Onboarding com os executivos	Completed	19/02/2025
Subtotal				
Globo (1)	QBR	QBR	Planned	18/04/2025
Subtotal				
Total (4)				

Flow Counts

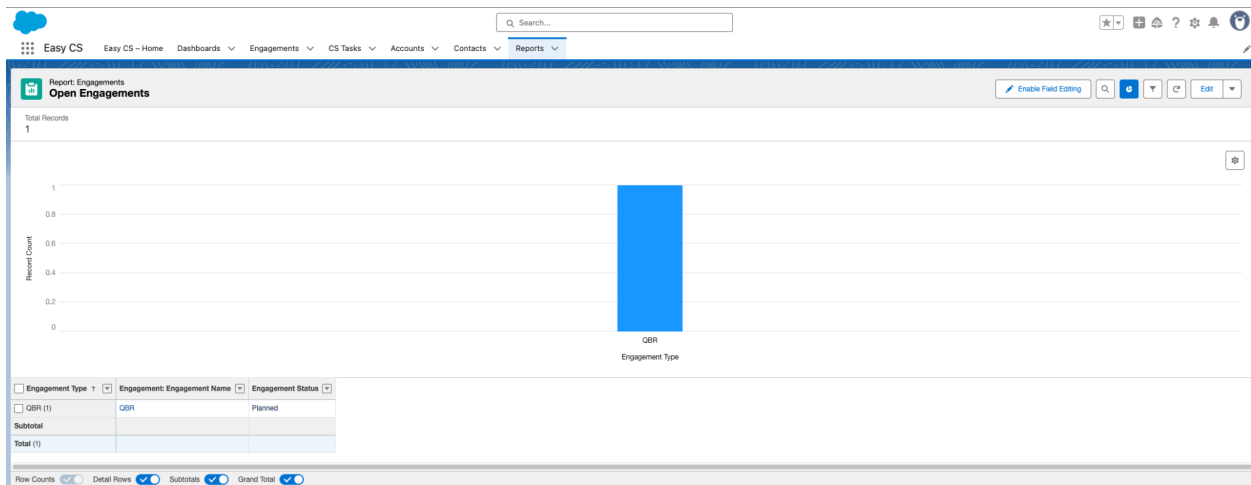
Detail Rows

Subtotals

Grand Total

# Sample Report – Open Engagements

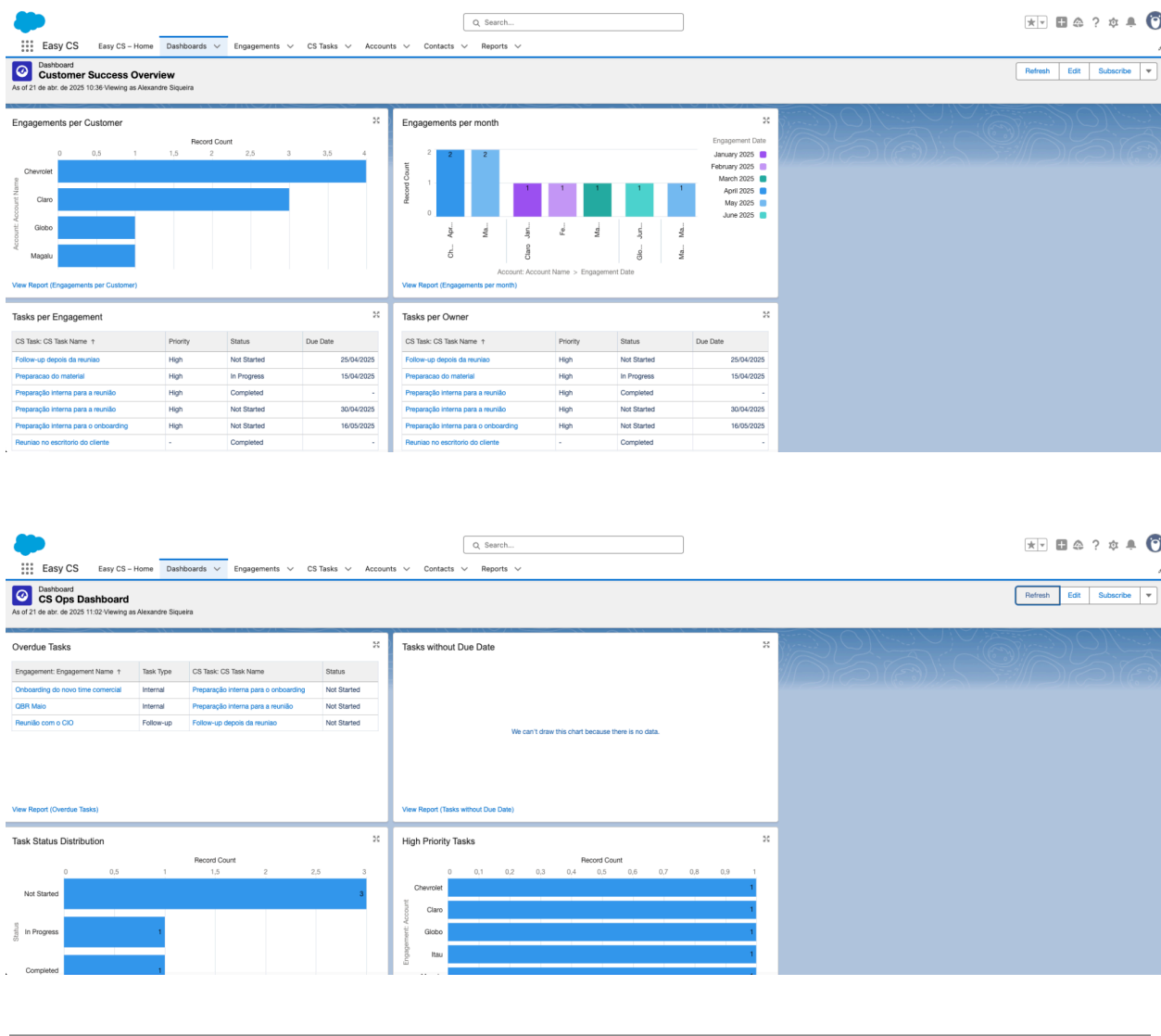
Bar chart showing all engagements marked as "Planned".



Dashboards

Two dashboards are included:

- **Customer Success Overview:** shows engagement volume and task status by customer and date
- **CS Ops Dashboard:** operational view of overdue tasks, missing due dates, and task status



## 7. User Permissions

### Overview

Easy CS was designed to work with standard Salesforce profiles and permission sets, enabling fast deployment across small teams. However, user roles and access levels can be customized as needed.

### Key Recommendations:

- **System Administrator:** Full access to all objects, reports, dashboards, and configuration.
- **CS Manager:** Read/write access to Accounts, Engagements, Tasks, and Reports. Ideal for team leaders.
- **CS Representative:** Read-only access to Accounts and Reports; edit access to Engagements and Tasks they own.

## Objects and Permissions:

Object	Read	Create	Edit	Delete
Account	✓	✓	✓	✗
Engagement	✓	✓	✓	✗
CS Task	✓	✓	✓	✗
Reports & Dashboards	✓	—	—	—

To manage permissions, you may:

- Clone existing Salesforce profiles and tailor them
- Use Permission Sets to assign access to custom objects without changing profiles

This flexibility ensures Easy CS can support different team structures while maintaining security and data integrity.

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