Easy CS – User Manual

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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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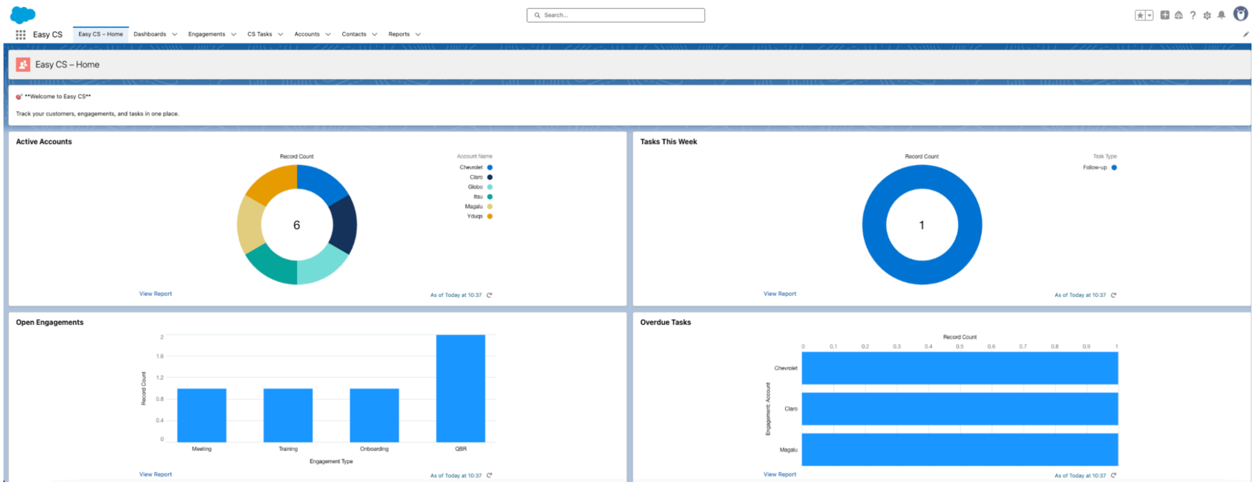
2. Home Page

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.

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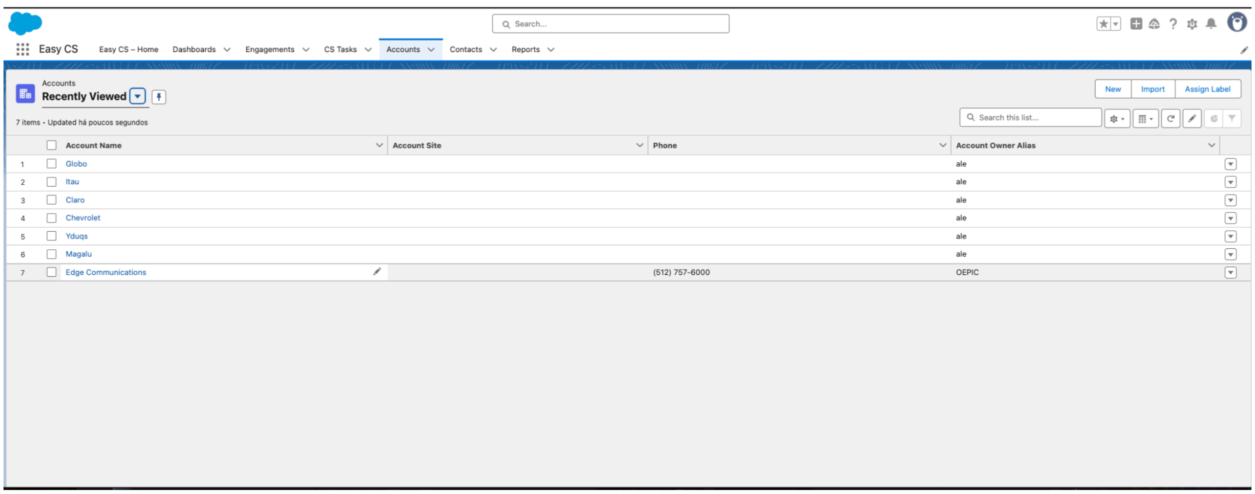
3. Managing Accounts

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

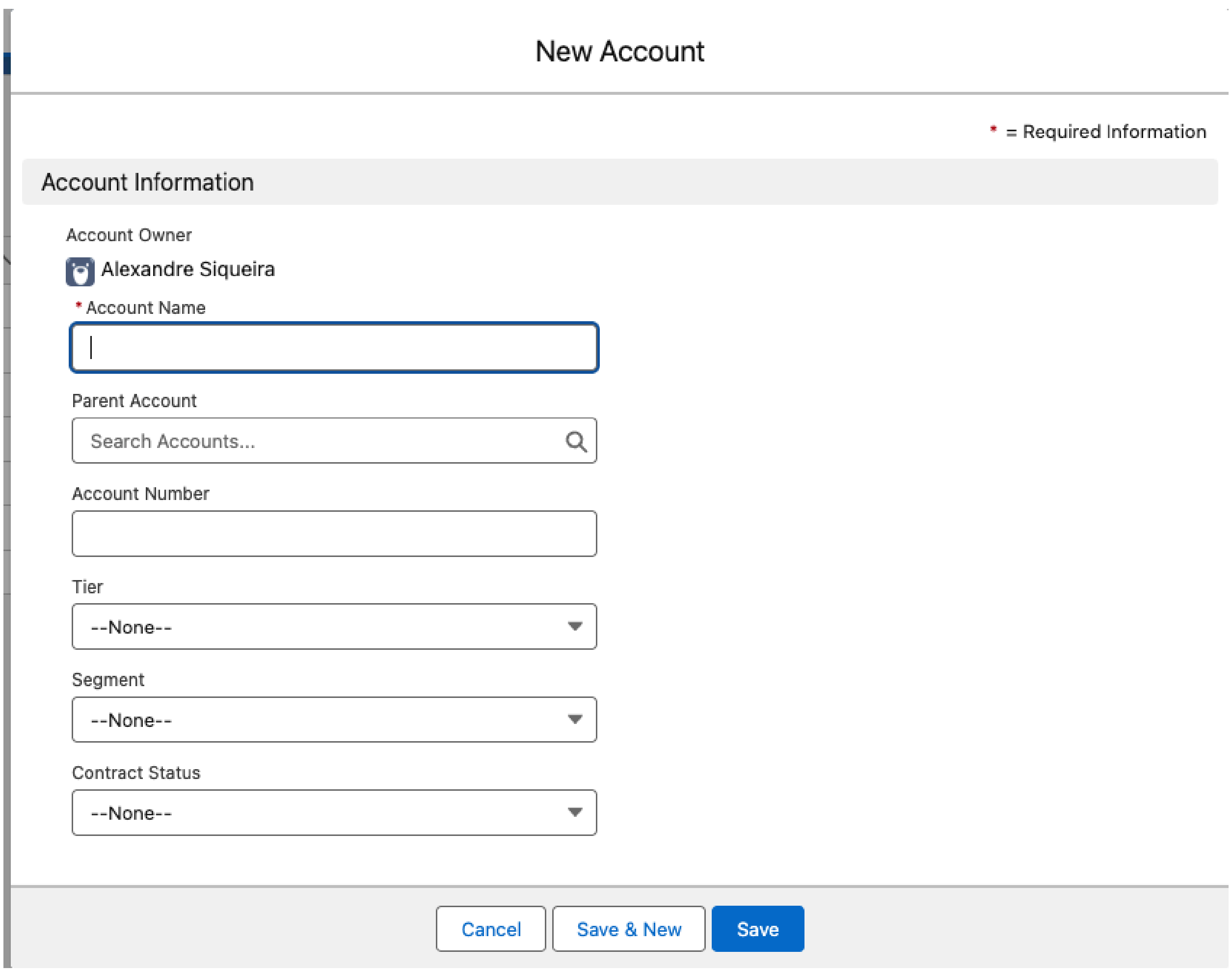
The default list shows recently viewed accounts, with columns like Account Name, Phone, and Account Owner Alias. You can customize list views, apply filters, or sort records as needed.



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)

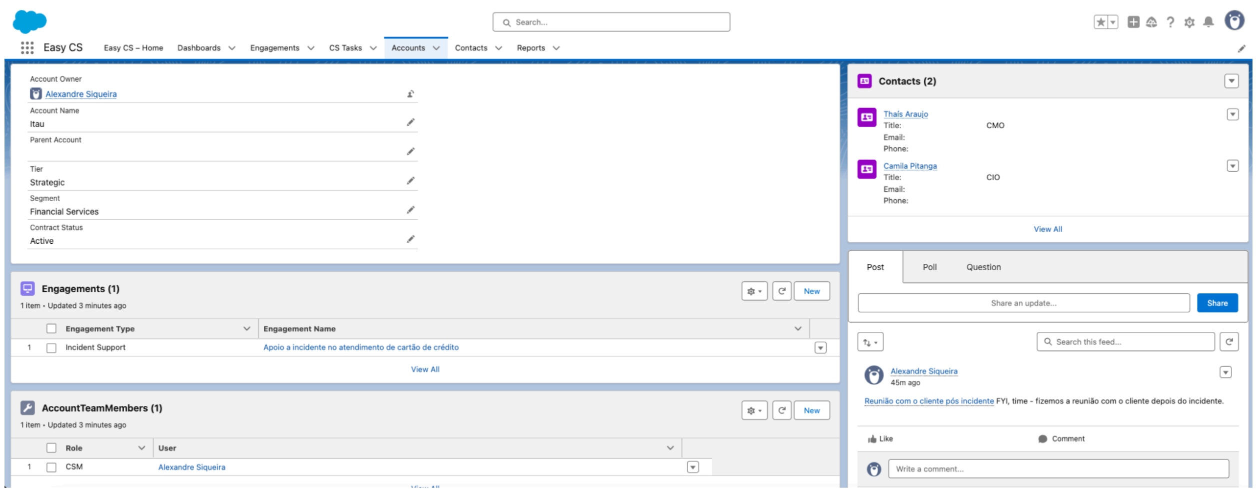
Then click **Save**.



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



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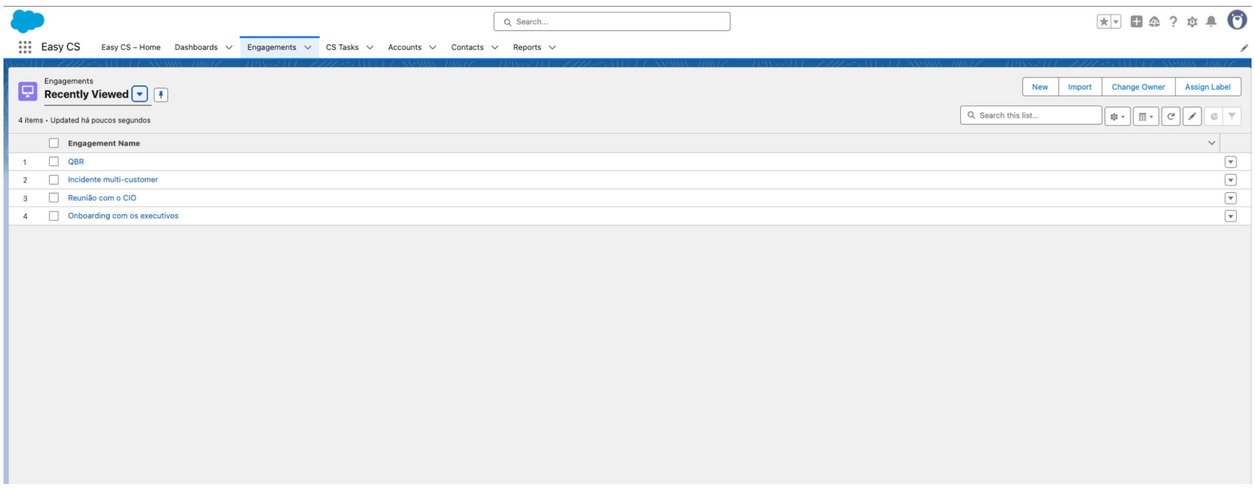
4. Managing Engagements

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.

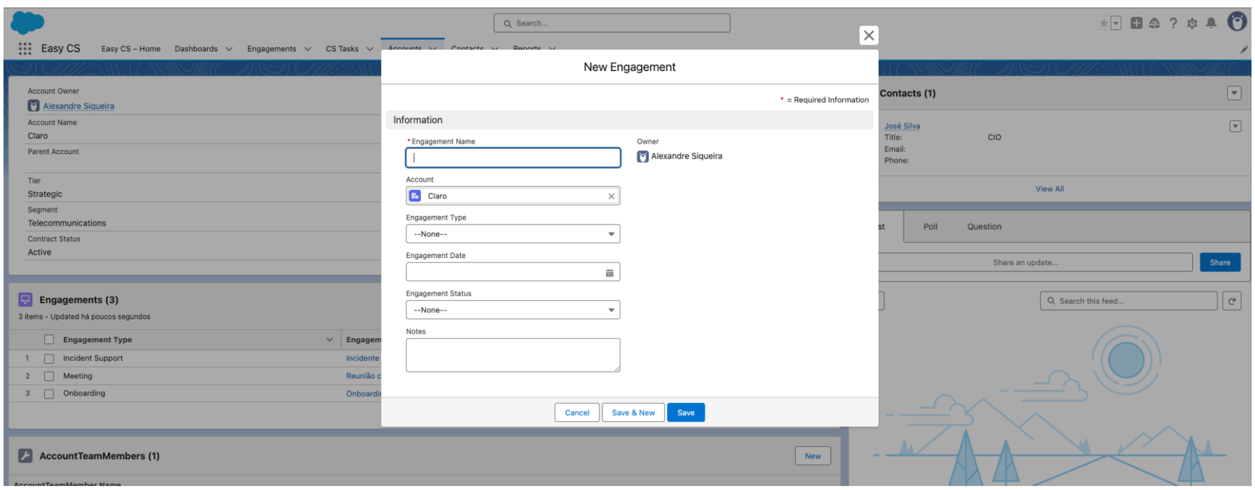
List View

The Engagements tab lists your most recent customer interactions.



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

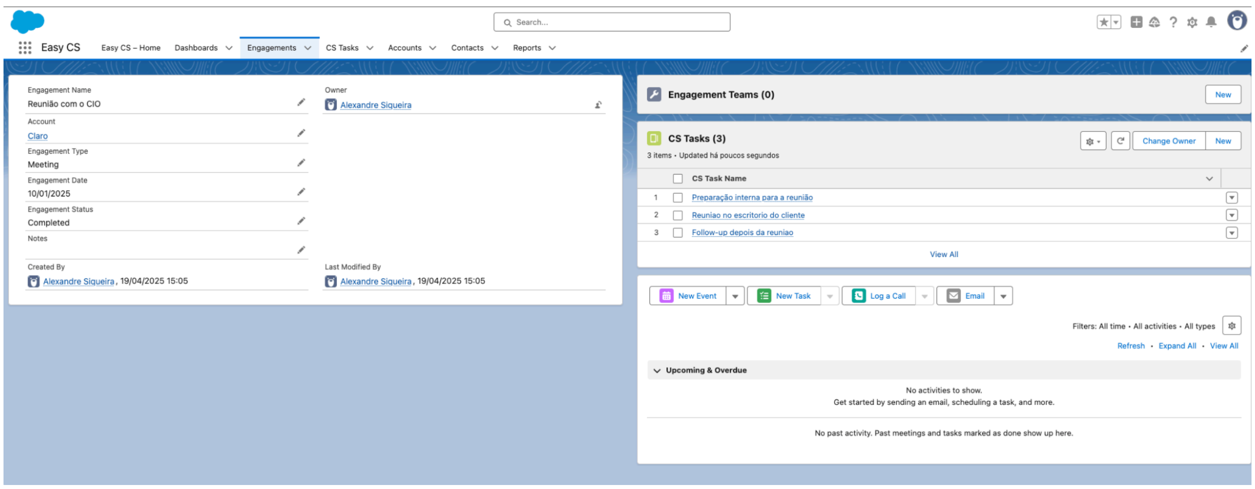
- **Engagement Name** (required)
- **Account** (automatically filled if created from Account page)
- **Engagement Type** (e.g., QBR, Kickoff, Incident)
- **Engagement Date**
- **Engagement Status** (Planned, In Progress, Completed)
- **Notes**



Engagement Detail Page

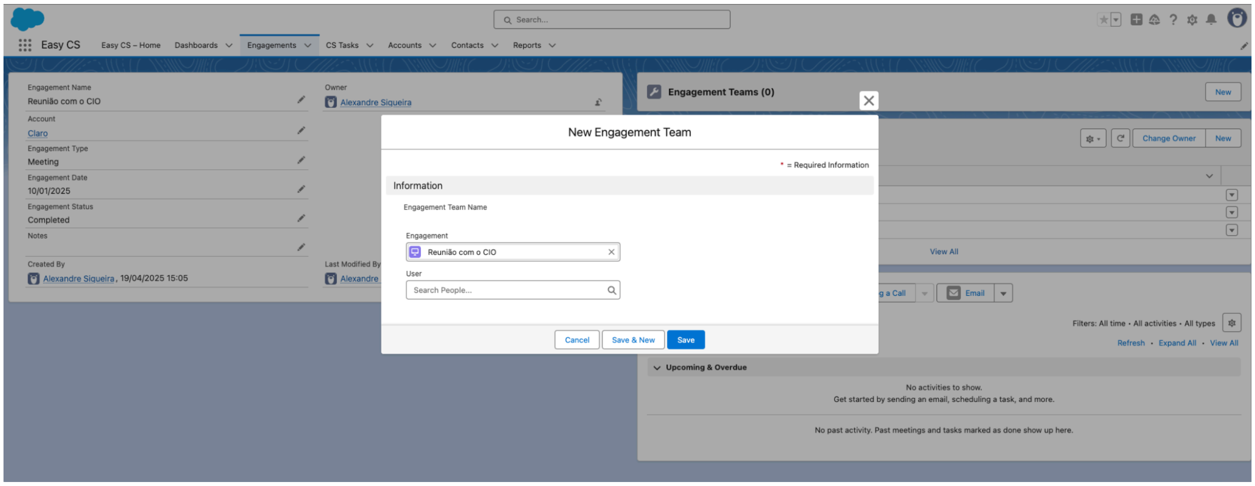
After saving, the detail page displays all engagement information, along with two key related lists:

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



Adding Team Members

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



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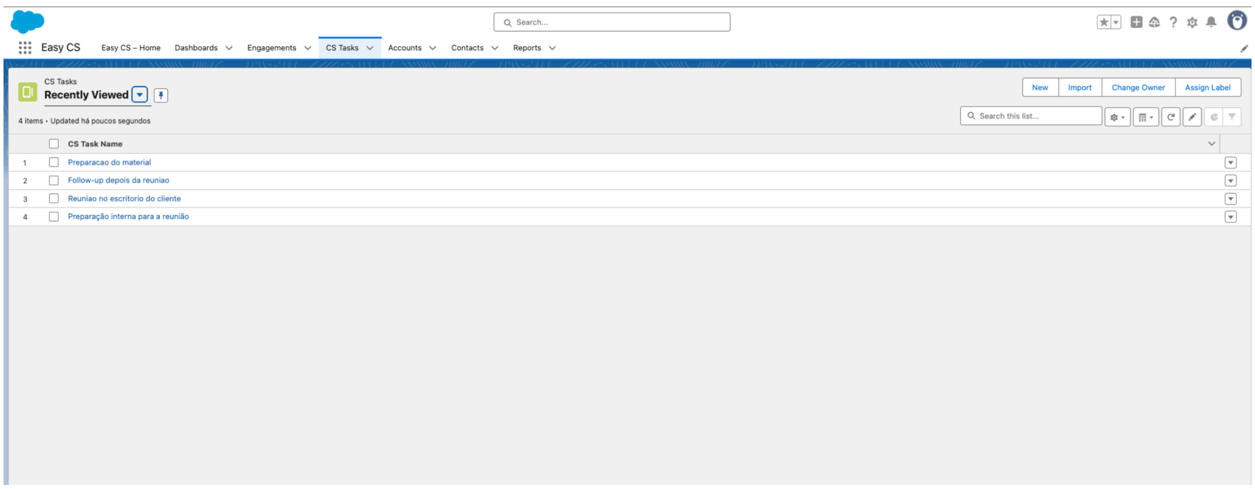
5. Managing CS Tasks

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

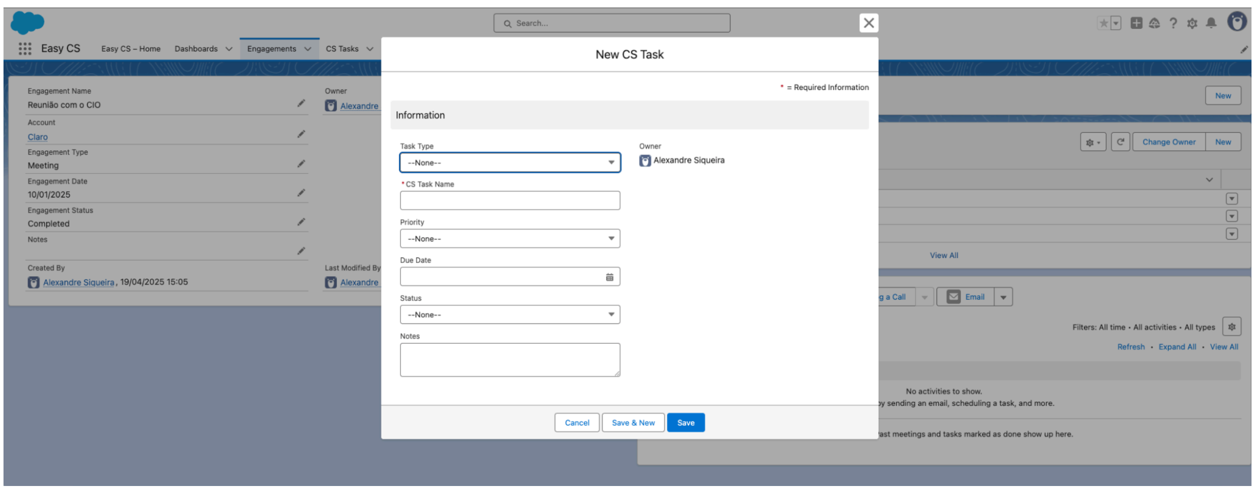
The CS Tasks tab shows a list of recently viewed items.



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**



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

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6. Reports and Dashboards

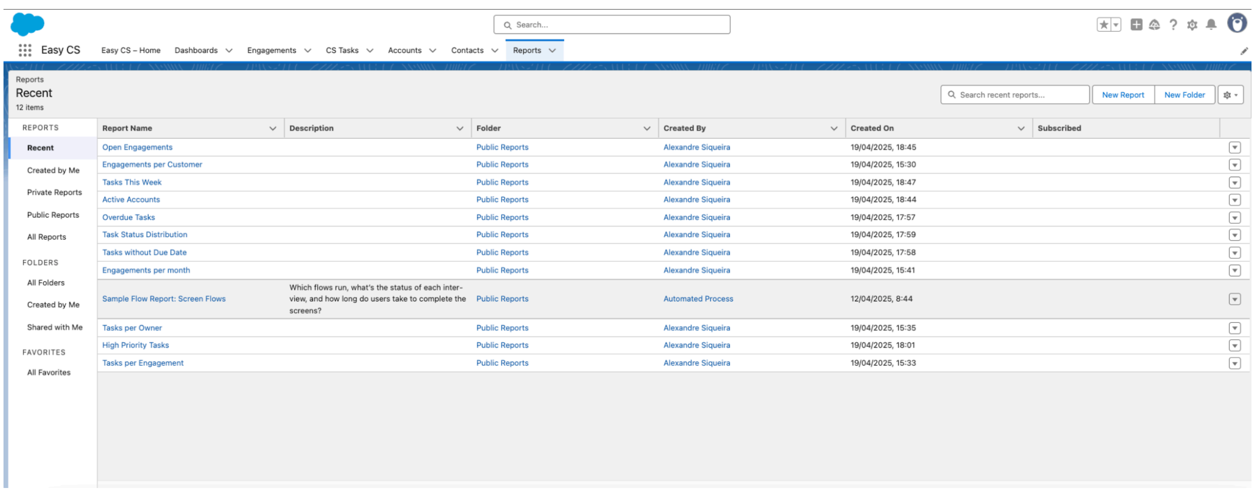
Overview

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

Reports

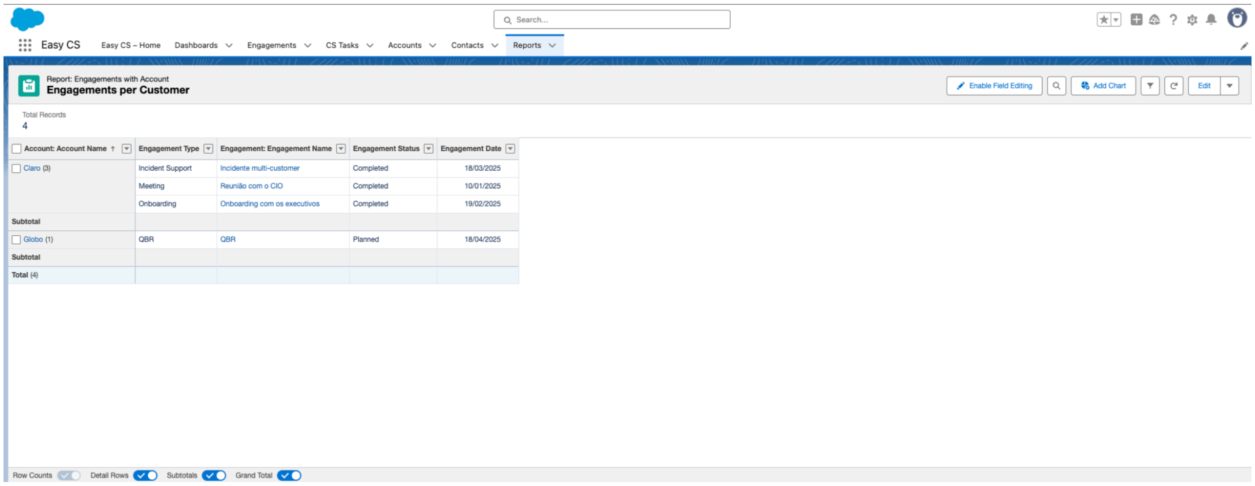
The app includes pre-built reports like:

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



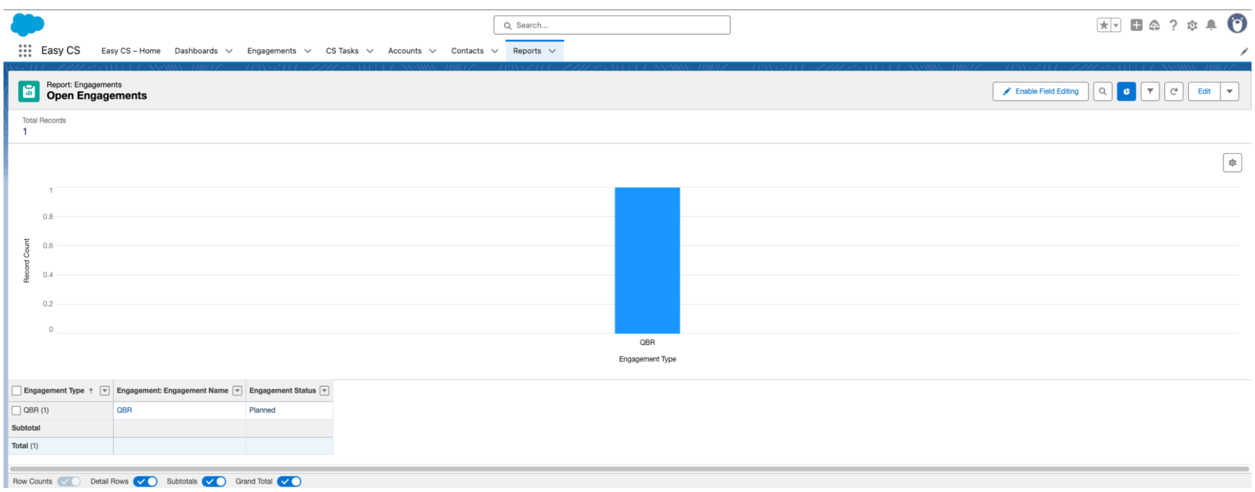
Sample Report – Engagements per Customer

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



Sample Report – Open Engagements

Bar chart showing all engagements marked as "Planned".

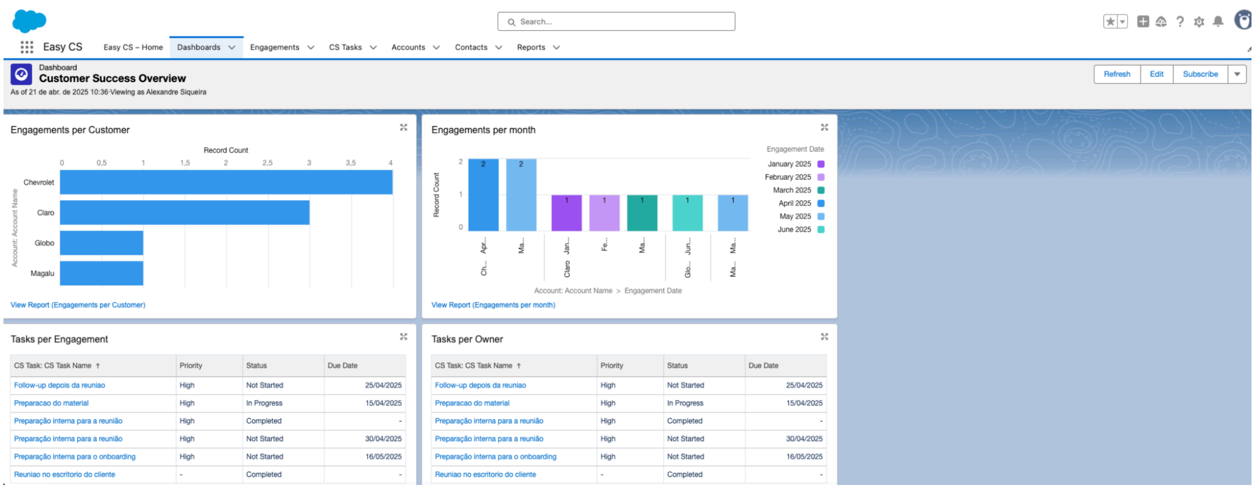


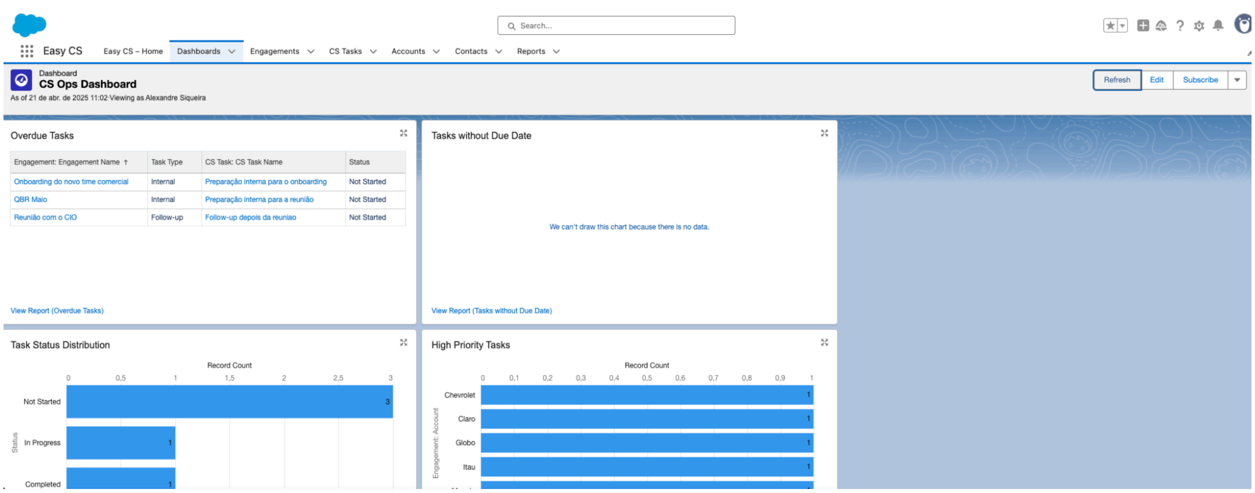
Dashboards

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.
