GoService – Complaint & Service Request Management System

Industry

Public Services / Smart City Governance

Project Type

B2C & B2G (Citizen → Government Department) Salesforce CRM Implementation

Target Users

- ✓ Citizens (raise complaints & track status)
- ✓ Department Staff (Education, Transportation, Health, Environment, etc.)
- ✓ Supervisors / City Managers (monitor resolution & efficiency)

Problem Statement

City residents frequently face issues such as potholes, broken streetlights, garbage collection delays, and poor public service responses. Currently:

- Complaints are scattered across phone calls, emails, and in-person visits.
- No centralized tracking exists, leading to delays and repeated complaints.
- Citizens lack transparency in complaint resolution progress.
- Supervisors struggle to monitor service efficiency across departments.

To solve this, the municipality wants to implement Salesforce CRM to:

- Automate complaint capture from web, mobile, and social channels.
- Categorize complaints by department and urgency.
- Assign tasks automatically to the right teams.
- Provide real-time dashboards for supervisors and management.
- Enhance citizen satisfaction through timely updates.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Functional Requirements:

- Citizens should be able to log complaints via a web form / mobile portal.
- Complaints should be categorized (Education, Transport, Health, Environment, etc.).
- The system should automatically assign complaints to the right department queue.
- Agents should update complaint status (New → In Progress → Resolved → Escalated).
- Supervisors should monitor SLA compliance and overdue complaints.
- Automatic notifications via email/SMS for updates.
- Reports & dashboards for city managers.

Non-Functional Requirements:

- System must handle high complaint volumes (scalability).
- Secure citizen data (PII protection).
- SLA-based performance metrics.
- Integration with SMS/email service.

2. Stakeholder Analysis

Citizens

- Role: End users who log complaints.
- Needs: Easy complaint submission & real-time tracking.

Department Staff (Agents)

- Role: Resolve complaints assigned to them.
- Needs: Task queue, service request scheduling, resolution updates.

Supervisors / Managers

- Role: Monitor staff performance & SLA compliance.
- Needs: Dashboards, reports, escalation visibility.

City Administrators (Govt Officials)

- Role: Strategic decision makers.
- Needs: High-level complaint trends & citizen satisfaction metrics.

3. Business Process Mapping

Current State (Manual):

- Citizen calls/visits office → Complaint written in registers.
- Agent assigned manually → Often delayed or lost.
- No central tracking → Citizens keep following up.
- Reports created manually → Errors and delays.

Future State (With Salesforce):

1. Complaint Submission: Citizen submits via form (Experience Cloud portal).
2. Auto-Categorization: Based on complaint type.
3. Assignment: Auto-assigned to queues/groups via Flows.
4. SLA Monitoring: Timer starts, escalates if overdue.
5. Resolution: Agent updates complaint status & adds notes.
6. Citizen Updates: Automatic SMS/email sent.
7. Reporting: Dashboards show resolution rates, pending complaints, SLA breaches.

4. Industry-Specific Use Case Analysis (Public Services / Smart City)

- ☞ Pain Point in Industry: Citizens often feel ignored due to lack of transparency in complaint resolution.
- ☞ Industry Goal: Improve citizen trust, efficiency of service delivery, and compliance with SLAs.
- ☞ CRM Advantage: Salesforce provides a centralized platform with automation, reporting, and mobile accessibility.

Examples of real-world relevance:

- Municipal corporations in India (like Bengaluru, Pune Smart City) use similar systems.
- International cities use Salesforce Service Cloud for citizen complaint management.

5. AppExchange Exploration

SMS Integration Apps:

- Twilio SMS for Salesforce
- Vonage SMS for Salesforce

Survey & Feedback Apps:

- Survey Force (for citizen feedback).

Field Service Apps:

- Field Service Lightning (for visit-based complaint resolution).

Other Utilities:

- Document management apps for storing proof of complaint.

Phase 2: Org Setup & Configuration

In this phase, the Salesforce environment (Org) was set up and configured to support the foundation of the Complaint Management System. The objective was to establish the org structure, user hierarchy, security model, and access controls before building custom objects and automation.

1. Salesforce Edition & Org Setup

A Developer Edition Org was used for the implementation.

- Company Name: GoService Pvt. Ltd.
- Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Default Currency: INR
- Default Locale & Language updated accordingly.

2. Business Hours, Holidays & Fiscal Year

- Configured business hours (Mon–Fri, 9 AM – 6 PM) for complaint resolution SLAs.

- Added a sample holiday list (e.g., National Holidays) to simulate downtime.

- Fiscal year was set to standard fiscal year (Jan–Dec).

3. User Roles (Hierarchy)

Roles were created to represent the hierarchy of users within the system:

- ❖ System Administrator (Top): Full org-wide visibility and control.

- ❖ Supervisor (Reports to Admin): Can see all complaints of staff in their team.

- ❖ Department Staff (Reports to Supervisor): Handles and resolves complaints assigned to them.

- ❖ Citizen (Lowest level): External user who can log their own complaints but cannot see others' records.
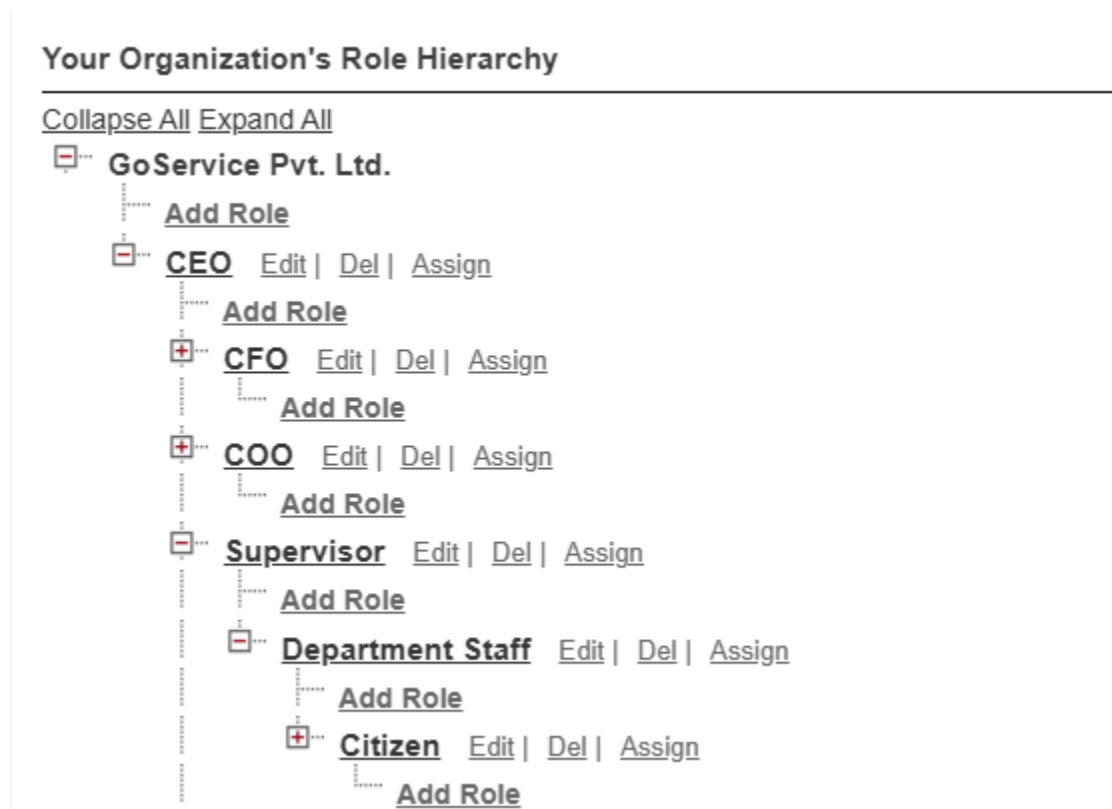
This ensures role hierarchy data visibility: Supervisor > Staff > Citizen.

4. User Profiles

Profiles were created by cloning standard profiles to control object-level permissions.

1. Citizen (cloned from Customer User): Minimal access; can only create and view their own complaint records.
2. Department Staff Profile (cloned from Standard User): Can view and update complaints assigned to them.
3. Supervisor (cloned from Standard User): Additional reporting and dashboard access, plus View All on complaints.
4. System Administrator Profile (default): Full access to all setup and records.

5. User Licenses & Users Created

Licenses were assigned to different types of users:

- ❖ Citizen User
  - ➢ License: Salesforce
  - ➢ Role: Citizen
  - ➢ Profile: Citizen Profile
  - ➢ Username: citizen@goservice.com
- ❖ Department Staff User
  - ➢ License: Salesforce
  - ➢ Role: Department Staff
  - ➢ Profile: Department Staff Profile
  - ➢ Username: staff@goservice.com
- ❖ Supervisor User
  - ➢ License: Salesforce Platform
  - ➢ Role: Supervisor
  - ➢ Profile: Supervisor Profile
  - ➢ Username: supervisor@goservice.com
- ❖ Admin User
  - ➢ License: Salesforce (System Administrator)
  - ➢ Role: System Administrator
  - ➢ Profile: System Administrator
  - ➢ Username: bhishan.cd22645@agentforce.com

6. Organization-Wide Defaults (OWD)

Configured OWD sharing settings for data security:

- Complaint Object (planned for Phase 3) → Private
- Role hierarchy ensures supervisors can see staff complaints, while staff cannot see each other's records.

7. Sharing Rules & Login Access

- Sharing rules not yet created (will be configured once objects are ready).
- Login access policies updated to allow Admin control over all users for troubleshooting.

Phase 3: Data Modeling & Relationships

The goal of Phase 3 was to design and implement the data model that powers the GoService Complaint Management System. This involved creating custom objects, fields, page layouts, and

relationships that reflect the real-world business process of logging, assigning, and resolving complaints.

1. **Objects Implemented**

   Standard Objects (Reused)

   - **User**: Represents Citizens, Department Staff, Supervisors, and Admins.

   - **Account & Contact**: Available for potential future extension to link citizens with contact details.

   Custom Objects (Created)

   1. **Complaint**: Core object for logging and tracking complaints.

   2. **Department**: Represents government departments (e.g., Health, Education, Transport).

   3. **Visit Log**: Tracks actions/visits taken by staff to resolve complaints.

2. **Fields Defined**

   Complaint Object

   - Complaint ID → Auto Number (CMP-0001, CMP-0002 …)
   - Complaint Title → Text
   - Description → Long Text Area
   - Complaint Type → Picklist (Health, Transport, Education, Environment)
   - Priority → Picklist (Low, Medium, High)
   - Status → Picklist (New, In Progress, Resolved, Closed)
   - Logged By → Lookup (User – Citizen)
   - Assigned To → Lookup (User – Staff)
   - Department → Lookup (Department)
   - Date Logged → Date/Time (Default: Now)
   - Resolution Notes → Long Text Area

Department Object

- Department Name → Text
- Department Head → Lookup (User)

Visit Log Object

- Visit/Action ID → Auto Number (ACT-0001, ACT-0002 …)
- Complaint → Master-Detail (Complaint)
- Performed By → Lookup (User – Staff)
- Action Taken → Long Text Area
- Action Date → Date/Time
- Next Step → Text

3. **Record Types**

Not required at this stage (all complaints share same process).

Future: Could introduce record types for complaint categories (Health, Transport, etc.).

4. **Page Layouts**

- **Complaint Page Layout**:

    o Section 1: Complaint Info (Title, Type, Priority, Status, Date Logged).

    o Section 2: Citizen Info (Logged By).

    o Section 3: Assignment (Assigned To, Department).

    o Section 4: Resolution (Resolution Notes).

Edit | Delete | Clone | Sharing

▼ Complaint Info

Complaint Title	Sample Text
Description	Sample Text
Complaint Type	Health
Priority	Low
Status	New
Date Logged	9/16/2025, 7:24 AM

▼ Citizen Info

Logged By	Sample Text

▼ Assignment

Assigned To	Sample Text
Department	Sample Text

▼ Resolution

Resolution Notes	Sample Text
Complaint ID	GEN-2004-001234

Owner   Sample Text [Change]

- **Compact Layout (Complaint)**: Displays *Title, Priority, Status, Assigned To* for mobile and highlights panel.

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

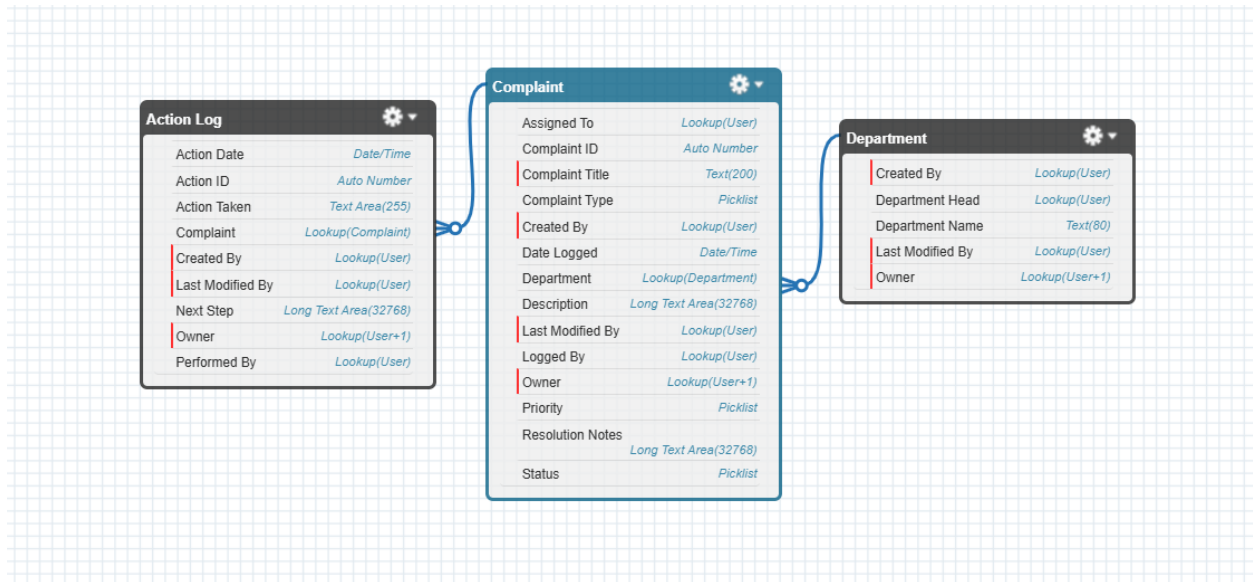|			
Label	Complaint Compact Layout	Object Name	Complaint
API Name	Complaint_Compact_Layout		
Included Fields	Complaint Title Priority Status Assigned To		
Created By	Bhishan Pangeni, 9/16/2025, 7:02 AM	Modified By	Bhishan Pangeni, 9/16/2025, 7:02 AM

Edit | Clone | Delete | Compact Layout Assignment

5. Schema Builder

6. External Objects

Could be used in future to pull external data (e.g., location services, government registry).