Customer Complaint CRM – Final Project Overview

Project Purpose:
To manage customer complaints efficiently in Salesforce by automating workflows, tracking complaints, assigning tasks, and providing dashboards for analysis while ensuring data security.

Project Implementation Overview

Phase 1: Requirements & Planning

- Identified key requirements: record complaints, track status, assign tasks, approve urgent complaints.
- Defined objects: **Customer**, **Complaint**.
- Listed required fields and picklist values.

Phase 2: Org Setup & Configuration

- Created **Custom Objects:** Customer, Complaint.
- Configured **Fields, Record Types, Page Layouts**.
- Set up **Profiles** and assigned permissions for Agents and Managers.

Phase 3: Data Model & Relationships

- Linked **Complaint → Customer** via lookup.
- Configured **Owner, Assigned To** fields to manage responsibilities.
- Ensured proper data structure for automation and reporting.

Phase 4: Process Automation

1. **Validation Rules:**
   - Complaint Date cannot be in the future.
   - Resolution Notes required when Status = Resolved or Closed.
2. **Record-Triggered Flow:**
   - Automatically create follow-up Task and send email when Priority = High.
3. **Approval Process:**
   - Priority = Urgent complaints require Manager approval before resolving.

Phase 5: Apex Programming *(minimal for project)*

- Skipped advanced Apex code and batch/queueable processing as not required.

Phase 6: Lightning UI

- Created **Custom Tabs** for Customers and Complaints.
- Built **Lightning App**: Complaint Management.
- Designed **Record Pages** for Complaint and Customer with Highlights, Details, Related Lists.
- Created **Home Page** showing key metrics and recent complaints.

Phase 7: Integration & External Access

- Skipped advanced external services and callouts; not required for this project.

Phase 8: Data Management & Deployment

- Imported test data using **Data Import Wizard** (10 rows for Customer & Complaint).
- Configured **Duplicate Rules** for Customer to prevent duplicates.
- Performed **Data Export & Backup** to secure records.
- Deployed metadata using **Change Sets**: objects, fields, flows, approval process, record pages.

Phase 9: Reporting, Dashboards & Security

- Created **Reports**: Complaints by Status, Complaints by Priority.
- Built **Dashboard** to visualize complaint distribution and priorities.
- Configured **Sharing Settings**: OWD = Private, role hierarchy for Agents and Managers.
- Applied **Field-Level Security** for sensitive fields like Resolution Notes.

Result / Project Outcome

- Fully functional **Customer Complaint CRM** in Salesforce.
- Automates complaint handling and approvals.

- Provides dashboards and reports for decision-making.
- Enforces proper access and data security.