

Phase 1 – Project Documentation

Project Title: Customer Complaint CRM (Retail Domain)

1. Problem Statement

Retail businesses often struggle to track and resolve customer complaints efficiently. Without proper complaint management, it becomes difficult to:

- Ensure timely resolution of customer issues.
- Track complaint trends and agent performance.
- Maintain customer satisfaction and loyalty.
- Automate notifications, acknowledgments, and escalations.

Solution: A Salesforce-based Customer Complaint CRM that allows retail businesses to manage complaints, automate assignment and escalations, and generate dashboards with actionable insights.

2. Introduction

The Customer Complaint CRM is a Salesforce application designed to help retail businesses efficiently handle customer complaints. It allows agents to track, update, and resolve complaints while giving managers visibility into complaint trends, agent performance, and resolution metrics. The system improves customer satisfaction and ensures complaints are handled in a timely and organized manner.

3. Objectives

- Centralize and manage all customer complaints in one system.
 - Automate complaint assignment to agents.
 - Send auto-response emails acknowledging complaint receipt.
 - Escalate unresolved complaints based on defined SLA rules.
 - Generate dashboards and reports to monitor case resolution times, priority trends, and agent performance.
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4. Scope

- Designed for retail businesses to track and resolve customer complaints efficiently.
- Includes:
 - **Standard Objects:** Case, Contact, Account

- **Custom Fields:** Complaint Type, Severity
 - **Automation:** Assignment Rules, Auto-response Emails, Escalation Rules
 - **Apex Trigger:** Auto-close resolved cases older than 7 days
 - **Reports & Dashboards:** Cases by Priority, Average Resolution Time, SLA tracking
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5. Stakeholders / End Users

- **Customers:** Submit complaints via web or email.
 - **Customer Service Agents:** Receive and resolve assigned complaints.
 - **Customer Service Manager:** Monitor SLA compliance and escalations.
 - **IT/Admin:** Manage Salesforce org, users, and automation.
 - **Management:** Analyze dashboards to identify trends and improve service quality.
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6. Process Flow

1. Customer submits a complaint via web or email.
 2. Salesforce auto-creates a Case.
 3. Assignment rules route the case to the appropriate agent.
 4. Auto-response email acknowledges receipt of the complaint.
 5. Escalation rules trigger if the complaint is unresolved beyond SLA.
 6. Managers track complaints and agent performance using dashboards.
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7. Modules / Features

- **Case Management:** Add, edit, view, and track complaint cases.
 - **Automation:** Auto-assignment, auto-response emails, and escalation rules.
 - **Apex Trigger:** Auto-close resolved complaints older than 7 days.
 - **Reports & Dashboards:** Cases by priority, average resolution time, SLA compliance, and agent performance.
 - **Integration:** Web-to-Case for easy complaint submission.
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8. Tools & Platform

- Salesforce Developer Edition
- Standard and Custom Objects (Case, Contact, Account, Custom Fields)
- Flows, Assignment Rules, Auto-response, Escalation Rules
- Lightning App Builder and LWC (Lightning Web Component)
- Data Import Wizard for sample complaints
- Reports & Dashboards

9. Expected Outcomes

- A fully functional Salesforce application to track and resolve customer complaints.
- Automated acknowledgment, assignment, and escalation of complaints.
- Dashboards providing insights into complaint trends, agent performance, and SLA adherence.
- A professional, demo-ready project suitable for submission and evaluation.