

AI-POWERED CASE CATEGORISATION FOR A SALESFORCE CUSTOMER SERVICE PLATFORM

This initiative was delivered for a Salesforce-based customer service platform built to help organisations improve customer satisfaction, employee development, and service operations. The client's solution supports leadership teams, managers, and agents in handling rising customer demands more effectively.

OVERVIEW

The client needed a smarter way to manage large volumes of customer issues coming through multiple channels, including emails, web chats, and phone calls.



Customer service teams often deal with cases that vary in urgency, risk, tone, and complexity. Without automated classification, agents may spend valuable time reviewing and sorting cases manually before action can be taken.



For this Salesforce client, the objective was to streamline case distribution by categorising customer communications based on content, vulnerability, risk, profanity, emotional tone, and compliance factors.

Rolustech implemented an AI-powered backend integrated with Salesforce to analyse incoming customer data, classify cases, detect emotions, and return structured results for automated case handling.

THE CHALLENGE

Prior to implementation, the client faced several constraints:

- Customer issues were reported across multiple communication channels
- Case content varied widely in urgency, sensitivity, and complexity
- Manual review slowed down case distribution and response times
- Customer satisfaction survey responses were difficult to categorise accurately
- The client needed better visibility into emotional tone and compliance levels
- Cases had to be prioritised based on risk, vulnerability, and priority indicators

The client required an intelligent solution that could work with Salesforce and support faster, more accurate service operations.

THE SOLUTION

AI Backend for Case Categorisation and Emotion Detection

Rolustech implemented an AI-powered backend that analysed incoming customer data and classified it based on content, emotion, compliance, risk, vulnerability, and profanity.

The AI returned structured JSON data, which was mapped into Salesforce fields across parent and child records. This enabled automated case distribution based on urgency, issue type, and emotional tone.

Following the success of the case categorisation process, the same AI model was extended to survey responses, helping the client monitor customer satisfaction with greater accuracy.

KEY HIGHLIGHTS

- **AI-Powered Case Classification:** Customer communications were automatically categorised based on content and priority signals.
- **Emotion Detection:** The system identified the emotional tone of customer interactions to support better service handling.
- **Risk and Compliance Assessment:** Cases were analysed for vulnerability, profanity, risk, and compliance indicators.
- **Salesforce Data Mapping:** AI-generated JSON data was mapped into Salesforce parent and child records.
- **Automated Case Distribution:** Cases were assigned more efficiently based on urgency, nature, and classification results.
- **Survey Response Categorisation:** The AI process was extended to customer surveys for improved satisfaction monitoring.

RESULTS

The AI-powered Salesforce integration improved case handling by reducing manual review and speeding up case distribution.

It helped teams prioritise sensitive cases more accurately using content, emotion, risk, and compliance signals. The survey categorisation also gave the client clearer insight into customer satisfaction and service performance.

WHY IT MATTERS

This case study shows how AI can make Salesforce customer service operations faster, smarter, and easier to scale.

By automating case categorisation and sentiment analysis, the client moved from manual sorting to more intelligent, insight-driven service management.

**AI-POWERED SALESFORCE
AUTOMATION DELIVERED THROUGH
A SECURE, SCALABLE INTELLIGENCE
LAYER.**



support@rolustech.com



US +1 415 800 4489



www.rolustech.com