

WSO2 CUSTOMER INFORMATION PORTAL

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Abstract

Wso2 was founded in 2005, WSO2 provides an open-source API-driven decentralized solutions that empowers developers and architects to be more productive and enables them to build digital products rapidly to meet the demand.

Currently, the organization uses Salesforce as their Customer Relationship Management System. This is used for everything customer related, customer details, customer notes, documents. Along with this, Google Drive was used to store other customer oriented and related pieces of information such as, Request for Quotations, Diagrams, Customer solutions. This Google Drive was organized by individuals handling that particular client, therefore organization of these documents was not always up-to par.

The main issues faced related to this work flow associated around the scattering of data amongst personal google drives, where those folders were not being routinely updated by the corresponding manager, where the customer related diagrams, architectures were not uploaded. As well as very custom reports not being able to be generated as per requirement, report customization was possible but not according to such a degree as some of the employees wished. Also, the bridge between the Solutions Architects and the Support team was too big, where the Solutions Architects who were in charge of clients technical needs were not routinely up-to date with clients technical assistance needed. With this being possible, Solutions Architects could predict customer satisfaction with relation to the customers support required.

This project intends on solving these issues, creating a Customer Information Portal, where all customer related data and details will be in one centralized location, enabling very custom reports to be generated, and bridging the gap between Solutions Architects and the support team. Where the teams can easily have access to all this data without the need of sifting through folders.