

## **Customer Success in Salesforce**

Independent Project: Use Salesforce to Support Customers

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# **Project**Overview

- 1 Task 1: Create New Cases
- **Task 2:** Create a Knowledge Base
- 3 Task 3: Create Knowledge Articles
- 4 Task 4: Business Case Analysis



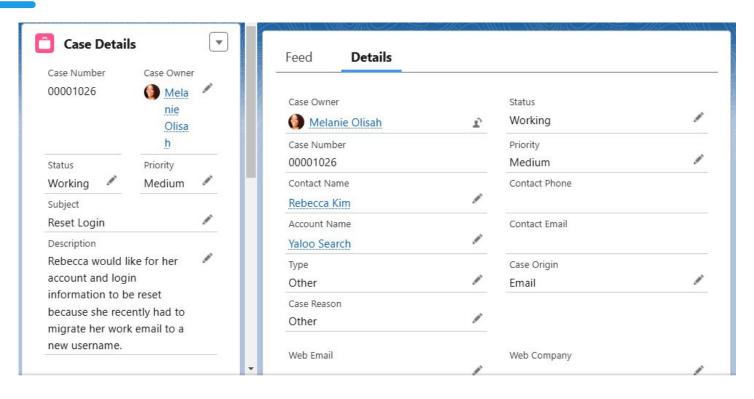
Insert a screenshot of each of the 3 new cases you've just created. Make sure to show the Case Details and Contact Details sections in your screenshot so that the Subject, Description, Status, Priority, and associated Contact are all visible.

**Step 1:** The new case you created for **Rebecca Kim**.

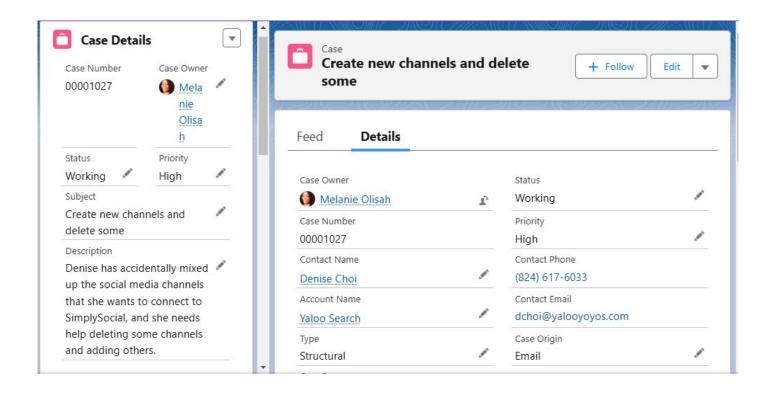
<u>Step 2:</u> The new case you created for **Denise Choi**.

<u>Step 3:</u> The second new case you created for **Denise Choi**.

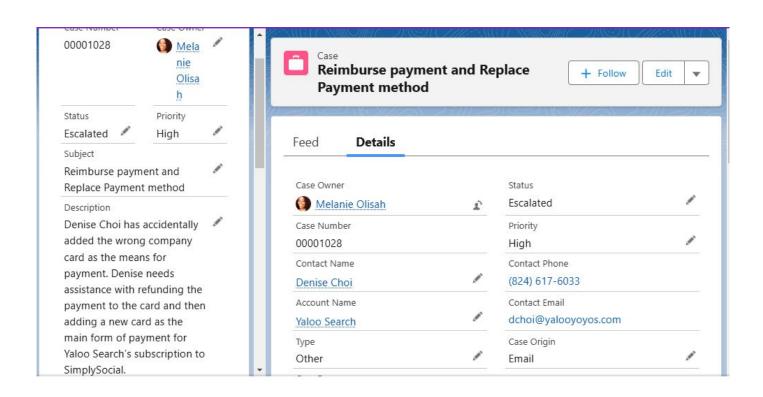












## Task 2: Create a Knowledge Base



Insert a screenshot of the Knowledge Base you created showing the data category group and the data categories within it.

## Task 2: Create a Knowledge Base



#### **Data Categories**





Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of continents, countries, regions, and states. Use this page to manage category groups and the categories they contain.

Category Groups	Groups Categories in Social Media Channel Management							
New	Save							
Active Category Groups	gory Groups							
Social Media Channel Management	- Channel Integration							
Inactive Category Groups	- Channel Selection							
	Post Scheduling and Content Calendar  Metrics							
	- Dashboards							
	L Social Media Conversations Activate Windows							
	Go to Settings to activate Windows							

#### Task 3: Create Knowledge Articles



Insert a screenshot on the following slide of the "Published Articles" list view showing you have created and published the six specified articles. Note that you may have to refresh your page for them all to appear in this list view.

## **Task 3: Create Knowledge Articles**



Knowledge Published Articles						New Publish Assign Archive Delete Article				
		Article Title ↑ ∨	Summary	~	Article Number	~	Languag	e	~	
1		Channel Integration			000001000	English				
2		Channel Selection			000001001	English				
3		Post Scheduling and content			000001002	English				
4		Social media conversions			000001005	English				
5		Social Media Dashboards			000001004		English		•	
		Social Media Metrics			000001003		English		·	

## **Task 4: Business Case Analysis**



In a short paragraph, describe how creating cases and knowledge base articles in Salesforce helps SimplySocial more efficiently and effectively support their customers. In your description, include:

- The overall purpose of cases and knowledge bases
- The major steps you took to create cases and a knowledge base
- How SimplySocial benefits from using cases and knowledge bases

## **Task 4: Business Case Analysis**



Creating cases and knowledge base articles in Salesforce helps SimplySocial efficiently and effectively support customers by centralizing issue management and providing quick access to solutions. Cases allow the team to track, prioritize, and resolve customer issues systematically, while the knowledge base stores reusable articles for consistent and fast responses. To create a case, we logged customer details, defined the issue, and assigned it to the appropriate team. For the knowledge base, we documented solutions, categorized articles, and published them for easy access. This approach reduces resolution times, empowers customers with self-service options, and ensures a streamlined support process for SimplySocial.