

# Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

*Melanie Olisah*



# Project Overview



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# Task 1: Create New Cases



*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**.



Step 2: The new case you created for **Denise Choi**.


Step 3: The second new case you created for **Denise Choi**.


# Task 1: Create New Cases


**Case Details**


Case Number  
00001026

Case Owner  
 [Melanie Olisah](#) 

Status  
Working 



Priority  
Medium 

Subject  
Reset Login 


Description  
Rebecca would like for her account and login information to be reset because she recently had to migrate her work email to a new username. 


Feed


**Details**


Case Owner  
 [Melanie Olisah](#) 


Case Number  
00001026


Contact Name  
[Rebecca Kim](#) 


Account Name  
[Yaloo Search](#) 


Type  
Other 


Case Reason  
Other 


Web Email  



Status  
Working 

Priority  
Medium 


Contact Phone  


Contact Email  


Case Origin  
Email 

Web Company  



# Task 1: Create New Cases

 **Case Details**

Case Number

00001027

Case Owner

 [Melanie Olisah](#)

Status

Working

Priority

High

Subject

Create new channels and delete some

Description

Denise has accidentally mixed up the social media channels that she wants to connect to SimplySocial, and she needs help deleting some channels and adding others.

Case

Create new channels and delete some

+ Follow


Edit

▼

Feed

**Details**

Case Owner

 [Melanie Olisah](#)

Case Number

00001027

Contact Name

[Denise Choi](#)

Account Name

[Yaloo Search](#)

Type

Structural

Status

Working

Priority

High

Contact Phone

(824) 617-6033

Contact Email

[dchoi@yaloooyoyos.com](mailto:dchoi@yaloooyoyos.com)

Case Origin


Email

# Task 1: Create New Cases

Case Number

00001028

Case Owner

 [Melanie Olisah](#)

Status

Escalated

Priority

High

Subject

Reimburse payment and Replace Payment method

Description

Denise Choi has accidentally added the wrong company card as the means for payment. Denise needs assistance with refunding the payment to the card and then adding a new card as the main form of payment for Yaloo Search's subscription to SimplySocial.

Case


Reimburse payment and Replace Payment method

[+ Follow](#) [Edit](#)

Feed

Details

Case Owner

 [Melanie Olisah](#)

Case Number

00001028

Contact Name

[Denise Choi](#)

Account Name

[Yaloo Search](#)

Type

Other

Status

Escalated

Priority

High

Contact Phone

(824) 617-6033

Contact Email

[dchoi@yaloooyoyos.com](mailto:dchoi@yaloooyoyos.com)

Case Origin

Email

## 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

[Keyboard Shortcuts](#) [Help for this Page](#) 

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

New

#### Active Category Groups

Social Media Channel Management

#### Inactive Category Groups

### Categories in Social Media Channel Management

Save

Undo

Redo

Expand All

Collapse All



All

Channel Integration

Channel Selection

Post Scheduling and Content Calendar

Metrics

Dashboards

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



6 items • Sorted by Article Title • Filtered by All knowledge - Language, Publication Status • Updated a few seconds ago



	<input type="checkbox"/> Article Title ↑	Summary	Article Number	Language	
1	<input type="checkbox"/> Channel Integration		000001000	English	
2	<input type="checkbox"/> Channel Selection		000001001	English	
3	<input type="checkbox"/> Post Scheduling and content		000001002	English	
4	<input type="checkbox"/> Social media conversions		000001005	English	
5	<input type="checkbox"/> Social Media Dashboards		000001004	English	
6	<input type="checkbox"/> 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.