

Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

Taofik Bankole Sanni



Project Overview



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Task 1: Create New Cases

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Task 2: Create a Knowledge Base

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Task 3: Create Knowledge Articles

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Task 4: Business Case Analysis

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



PATHSTREAM

Project Instructions | Coursera x Hands-On Orgs x 00001026 | Case | Salesforce x Copy of l On-Screen Keyboard

sannevgoldfieldltd4-dev-ed.develop.lightning.force.com/lightning/r/Case/5007R00003aKCd7QAG/view

GOETHE-ZERTIFIKA... Goethe-Institut Nig... Split PDF goethe A1 schreiben... (94) Goethe Zertifik... ORION GATE

Service Console Cases 00001026 | Case

Recently Viewed

0 items • Updated 6 minutes ago

Search this list...

Recently Viewed

Case Details

Case Number	Case Owner
00001026	Taofik Sanni
Status	Priority
Working	Medium
Subject	
Login Information Reset	
Description	
Reset of login information due to email migration	

Contact Details

Name	
Mrs. Rebecca Kim	
Title	Account Name
	Yaloo Search
Email	Phone
	(824) 617-6033

Cases for Parent Contact (1)

00001026	
Subject:	Login Information Reset
Priority:	Medium
Created:	10/07/2022 11:14

Case Login Information Reset

+ Follow Edit

Feed

Post Poll

Share an update... Share

Most Recent Activity

Search this feed...

All Updates Call Logs Text Posts Status Changes

Taofik Sanni Case created Just now

Subject: Login Information Reset
Priority: Medium
Status: Working
Case Number: 00001026

Comment

Milestones

No milestones to show.

Related

Attachments (0)

Upload Files

Or drop files

Activity History (0)

Open Activities (0)

You haven't viewed any Cases recently.
Try switching list views.

Task 1: Create New Cases



Project Instructions | Coursera x Hands-On Orgs x 00001027 | Case | Salesforce x Copy of l On-Screen Keyboard

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Case/5007R00003aKD7bQAG/view

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Service Console Cases 00001026 | Case 00001027 | Case

All Open Cases

4 items • Updated a minute ago

Search this list...

Case Number	
00001002	Stella Pavlova
Seeking guidance on electrical wiring installation for GC5060	New
00001016	Edna Frank
Maintenance guidelines for generator unclear	New
00001024	Lauren Boyle
Design issue with mechanical rotor	New
00001026	Rebecca Kim
Login Information Reset	Working

Case Details

Case Number: 00001027 Case Owner: Taofik Sanni

Status: Working Priority: High

Subject: Delete and Add Channels

Description: Deleting and adding channel to social media page due to mix up

Contact Details

Name: Mr. Denise Choi

Title: Director of Marketing Operations Account Name: Yaloo Search

Email: dchoi@yaloooyoyos.com Phone: (824) 617-6033

Cases for Parent Contact (1)

00001027

Subject: Delete and Add Channels

Delete and Add Channels

+ Follow Edit

Feed

Post Poll

Share an update... Share

Most Recent Activity

Search this feed...

All Updates

Call Logs Text Posts Status Changes

Taofik Sanni Case created Just now

Subject: Delete and Add Channels Priority: High Status: Working Case Number: 00001027

Comment

Milestones

No milestones to show.

Related

Attachments (0)

Upload Files

Or drop files

Activity History (0)

Open Activities (0)

Task 1: Create New Cases



Project Instructions | Coursera | Hands-On Orgs | 00001028 | Case | Salesforce | Copy of I

sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/r/Case/5007R00003aKD7cQAG/view

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Service Console Cases 00001026 | Case 00001027 | Case 00001028 | Case

All Open Cases

5 Items • Updated a few seconds ago

Search this list...

Case Number	Case Owner
00001002	Stella Pavlova
Seeking guidance on electrical wiring installation for GC5060	
00001016	Edna Frank
Maintenance guidelines for generator unclear	
00001024	Lauren Boyle
Design issue with mechanical rotor	
00001026	Rebecca Kim
Login information Reset	
00001027	Denise Choi
Delete and Add Channels	

Case Details

Case Number: 00001028 Case Owner: Taofik Sanni

Status: Working Priority: High

Subject: Payment Card update

Description: Updating card payment type due to wrongly added card type

Contact Details

Name: Mr. Denise Choi

Title: Director of Marketing Operations Account Name: Yaloo Search

Email: dchoi@yaloooyoyo.com Phone: (824) 617-6033

Cases for Parent Contact (2)

00001028

Subject: Payment Card update

Case: Payment Card update

+ Follow Edit

Feed

Post Poll

Share an update... Share

Most Recent Activity

Search this feed...

All Updates

Call Logs Text Posts Status Changes

Taofik Sanni Case created

Subject: Payment Card update Priority: High Status: Working Case Number: 00001028

Comment

Milestones

No milestones to show.

Related

Attachments (0)

Upload Files

Or drop files

Activity History (0)

Open Activities (0)

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



Project Instructions | Coursera | Hands-On Orgs | 00001026 | Case | Salesforce | Data Category Setup

sannevgoldfieldltd4-dev-ed.develop.lightning.force.com/lightning/setup/DataCategorySetup/home

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Search Setup

Service Setup Home Object Manager

Click Find

Setup Home

Mobile App

Authentication Assistant

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edge

ata Category Assignments

ata Category Mappings

nowledge Settings

Validation Statuses

Categories

ata Category Setup

efault Data Category

sibility

Channel

RM TOOLS

m Code

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ts Automation

TERFACE

ts and Fields

nterface

On-Screen Keyboard

Home PgUp Nav

End PgDn Mv Up

Insert Pause Mv Dn

PrntScn ScrLk Dock

Options Help Fade

SETUP Data Category Setup

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

New

Active Category Groups

Channel Integration

Inactive Category Groups

Categories

Save Undo Redo Expand All Collapse All

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



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sannevgoldfieldtd4-dev-ed.develop.lightning.force.com/lightning/o/Knowledge__kav/list?filterName=Recent

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Service Console Knowledge Social Media Conver...

Knowledge Recently Viewed 6 items • Updated a few seconds ago

New Publish Assign Archive Delete Article

	Article Title	Summary	Article Number	Published Date	Publication Status	Validation Status
1	Social Media Conversations		000001005	19.07.2023, 22:42	Published	Not Validated
2	Dashboards		000001004	19.07.2023, 22:41	Published	Not Validated
3	Metrics		000001003	19.07.2023, 22:39	Published	Not Validated
4	Post Scheduling		000001002	19.07.2023, 22:38	Published	Not Validated
5	social media channel removal		000001001	19.07.2023, 22:36	Published	Not Validated
6	Social media integration		000001000	19.07.2023, 22:33	Published	Not Validated

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



The overall purpose of cases and knowledge bases in Salesforce is to streamline and enhance customer support and service processes. Cases serve as individual records that track customer inquiries, issues, or complaints, enabling support agents to efficiently manage and resolve them. To create cases and a knowledge base in Salesforce, first enable the case management and knowledge base features in the org. Configure case settings, including assignment rules and escalation processes. Create case record types to categorize issues effectively. Set up mechanisms for case creation, such as email-to-case and web-to-case. Build the knowledge base by creating informative articles with approval workflows. Integrate the knowledge base with cases for easy access by support agents.

Using cases and knowledge bases in Salesforce offers numerous benefits to SimplySocial. Firstly, cases streamline customer support processes, enabling efficient tracking and resolution of customer inquiries and issues, resulting in improved customer satisfaction and loyalty.

You have reached the end of this **Project!**



This is the end of this Independent Project! Great job completing all these tasks in Salesforce. Make sure you download a copy of this deck for your portfolio.