

Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

Taofik Bankole Sanni

Project Overview

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



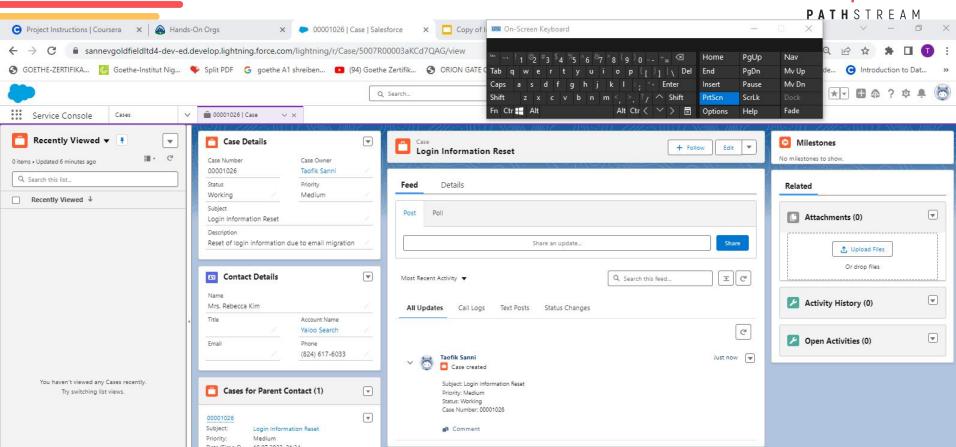
Insert a screenshot of each of the 3 new cases you've just created. Make sure to show the Case Details and Contact Details sections in your screenshot so that the Subject, Description, Status, Priority, and associated Contact are all visible.

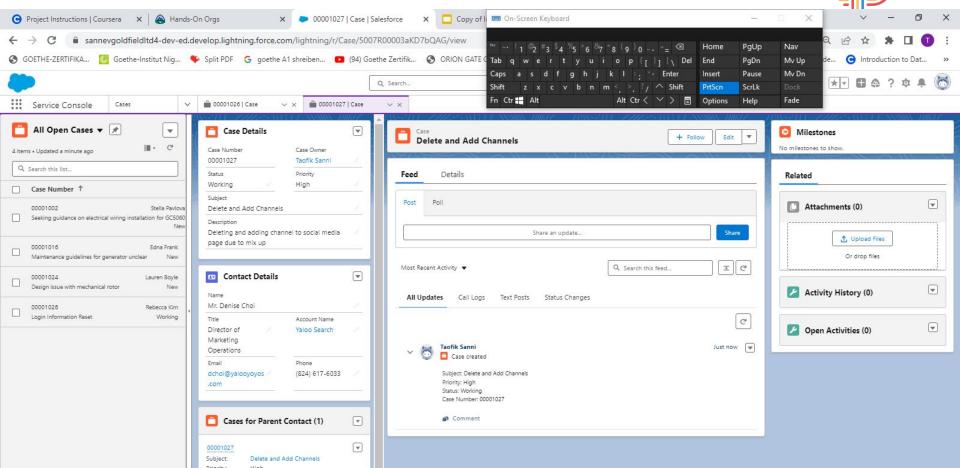
Step 1: The new case you created for **Rebecca Kim**.

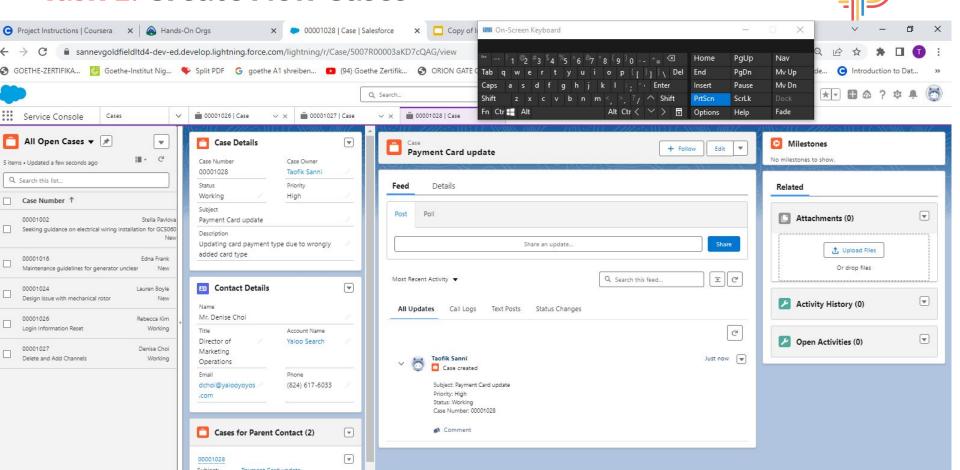
<u>Step 2:</u> The new case you created for **Denise Choi**.

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







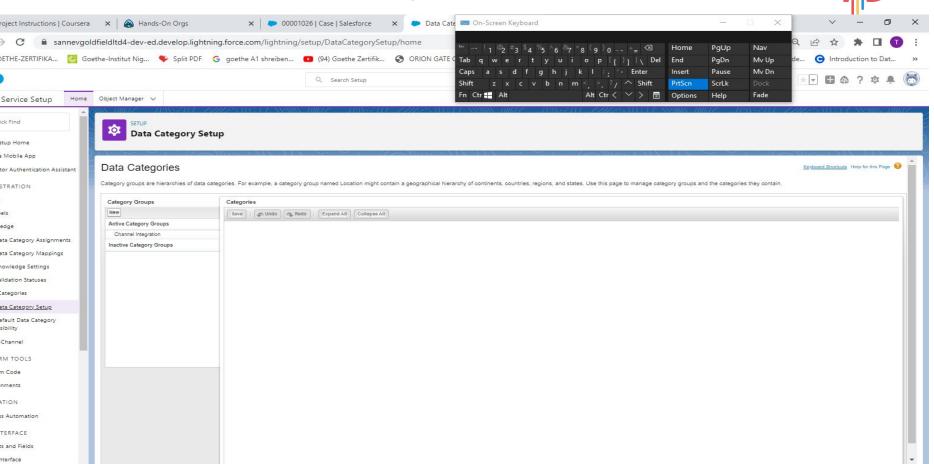


Task 2: Create a Knowledge Base



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

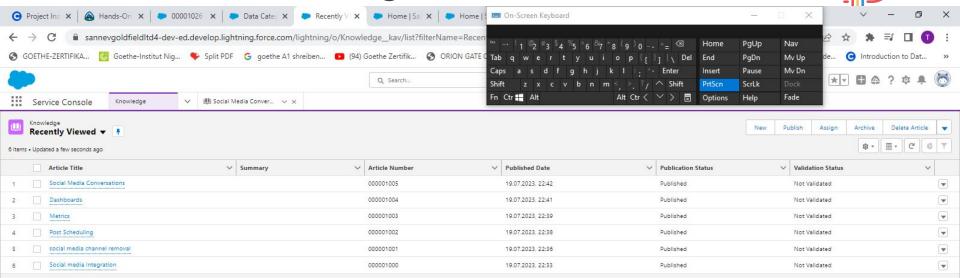


Task 3: Create Knowledge Articles



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



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.