

# Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

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# 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

**Software used:** Trailhead playground and salesforce developer account

# Task 1: Create New Cases



*Inserted in the next 4 slides are screenshots of each of the 3 new cases I created just created. I showed the Case Details and Contact Details sections with the Subject, Description, Status, Priority, and associated Contact.*

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

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

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

# Task 1: Create New Cases

The screenshot shows a Salesforce interface for a case titled "Login and account Reset". The browser address bar indicates the URL is `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSyxXAAT/view`. The case number is 00001026.

**Case Details:**

- Case Number: 00001026
- Case Owner: Ogbonna Ngwu
- Status: Working
- Priority: Medium
- Subject: Login and account Reset
- Description: Having issues with account login, needs account to be reset and restored

**Contact Details:**

- Name: Mrs. Rebecca Kim
- Title:
- Account Name: Yaloo Search
- Email:
- Phone:

**Case Feed:**

- Tab: Feed (selected)
- Post type: Post (selected)
- Share an update... (input field)
- Share button
- Most Recent Activity (dropdown)
- Search this feed... (input field)
- Filters: All Updates (selected), Call Logs, Text Posts, Status Changes
- Activity: Ogbonna Ngwu (Case created) - Just now
- Subject: Login and account Reset
- Priority: Medium
- Status: Working

**Milestones:**

- No milestones to show.

**Related:**

- Attachments (0)
- Upload Files button
- Or drop files
- Activity History (0)
- Open Activities (0)

**Footer:**

- History
- Notes

# Task 1: Create New Cases

The screenshot shows the Salesforce interface for a Case record. The browser address bar displays the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSzF6AAL/view`. The page title is "00001027 | Salesforce".

The left sidebar contains the "Service Console" and "Cases" tabs. The main content area is titled "Case Channel integrations" and includes a "Feed" tab and a "Details" tab. The "Feed" tab shows a "Post" section with a "Poll" button and a "Share an update..." input field. Below this is a "Most Recent Activity" section with a search bar and a "Search this feed..." input field. The "Details" tab shows a "Case created" event by "Ogbonna Ngwu" with the subject "Channel integrations", priority "High", and status "New".

The right sidebar contains the "Milestones" section (No milestones to show.) and the "Related" section, which includes "Attachments (0)", "Activity History (0)", and "Open Activities (0)".

The bottom of the page has a "History" and "Notes" section.

**Case Details:**

Field	Value
Case Number	00001027
Case Owner	Ogbonna Ngwu
Status	New
Priority	High
Subject	Channel integrations
Description	she needs help deleting some wrong channels and adding others.

**Contact Details:**

Field	Value
Name	Mr. Denise
Title	
Account Name	
Email	
Phone	

**Case Channel integrations:**

**Feed:**

**Details:**

**Case created** by Ogbonna Ngwu

Subject: Channel integrations  
Priority: High  
Status: New

**Milestones:** No milestones to show.

**Related:**

- Attachments (0)
- Activity History (0)
- Open Activities (0)

**History** **Notes**

# Task 1: Create New Cases

The screenshot displays the Salesforce Service Console interface for creating a new case. The browser address bar shows the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSzHqAAL/view`. The console is divided into several sections:

- Case Details:** Contains fields for Case Number (00001028), Case Owner (Ogbonna Ngwu), Status (Escalated), Priority (High), Subject (Payment refund and Card details replacement), and Description (needs 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).
- Contact Details:** Contains fields for Name (Mr. Denise), Title, Account Name, Email, and Phone.
- Case Feed:** Shows the case title "Payment refund and Card details replacement" with a "Follow" button. Below the title is a "Feed" tab with a "Post" button and a text input field "Share an update...". A "Share" button is also present. The feed shows "Most Recent Activity" with a search bar "Search this feed...".
- Related:** Includes sections for "Attachments (0)", "Activity History (0)", and "Open Activities (0)".
- Updates:** A section titled "All Updates" showing a recent update by "Ogbonna Ngwu" with the subject "Payment refund and Card details replacement" and priority "High".

The bottom of the console shows a "History" tab and a "Notes" tab.

Quick Find

Service Setup Home

New Salesforce Mobile App QuickStart

Multi-Factor Authentication Assistant

ADMINISTRATION

> Users

> Channels

> Knowledge

> Data Categories

> Omni-Channel

PLATFORM TOOLS

> Custom Code

> Environments

AUTOMATION

> Process Automation

USER INTERFACE

> Objects and Fields

Today's Performance

By Priority  
Number of Cases



By Channel  
Number of Cases



By Status  
Number of Cases



Cases Created

3

Cases Closed

0

Lifetime Performance



Current Usage



> Service Features

> Storage

> Other

## Task 2: Create a Knowledge Base



*A screenshot of the Knowledge Base I created showing the data category group and the data categories within it is inserted below.*



# Task 2: Create a Knowledge Base

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/setup/ArticleFilterRules/home`. The page title is "Data Category Mappings". The left sidebar contains a search bar with "kno" and a list of navigation items: "Knowledge", "Data Category Assignments", "Data Category Mappings", "Knowledge Settings", and "Validation Statuses". The main content area is titled "Case to Data Category Mapping" and includes a description: "Define which case fields map to which data category groups and set a default data category for cases that have no value for the mapped fields. For example, you can map a products custom case field with a products data category group to filter the articles for the customer's products..". Below this is a table with four columns: "Action", "Case Field", "Data Category Group", and "Default Data Category". The table contains one row with the following values: "Add", "Case Origin", "Social Media Channel Management", and a dropdown menu. The dropdown menu is open, showing options: "-- None --", "-- None --", "All", "Channel Integration", "Channel Selection", "Post Scheduling and Content Calendar", "Metrics", "Dashboards", and "Social Media Conversations".

Recently Viewed | Knowledge | Sales | Data Category Mappings | Sales

Search Setup

Service Setup Home Object Manager

Knowledge

- Data Category Assignments
- Data Category Mappings
- Knowledge Settings
- Validation Statuses

Didn't find what you're looking for? Try using Global Search.

## Case to Data Category Mapping

Define which case fields map to which data category groups and set a default data category for cases that have no value for the mapped fields. For example, you can map a products custom case field with a products data category group to filter the articles for the customer's products..

Action	Case Field	Data Category Group	Default Data Category
Add	Case Origin	Social Media Channel Management	-- None -- -- None -- All Channel Integration Channel Selection Post Scheduling and Content Calendar Metrics Dashboards Social Media Conversations

## Task 3: Create Knowledge Articles



*Inserted a screenshot on the following slide of the “Published Articles” list view showing I have created and published the six specified articles.*

# Task 3: Create Knowledge Articles

Published Articles | Knowledge | x +

greeneratechnologies-dev-ed.lightning.force.com/lightning/o/Knowledge\_\_kav/list?filterName=00B8d00000AfV1zEAF

Search...

Service Console Knowledge Dashbo... Conver... View m... Schedu... Channe... How to... More

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 ↑	<input type="checkbox"/> Summary	<input type="checkbox"/> Article Number	<input type="checkbox"/> Language	
1	<input type="checkbox"/> Channel selection		000001001	English	▼
2	<input type="checkbox"/> Convert on social media		000001004	English	▼
3	<input type="checkbox"/> Dashboard viewing		000001005	English	▼
4	<input type="checkbox"/> How to integrate channels		000001000	English	▼
5	<input type="checkbox"/> Scheduling and calenders		000001002	English	▼
6	<input type="checkbox"/> View metrics		000001003	English	▼

## Task 4: Business Case Analysis



*In a short paragraph, I described how I creating cases and knowledge base articles in Salesforce to help SimplySocial be more efficiently and effectively support their customers. My description, includes:*

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

## Task 4: Business Case Analysis



1. Cases are used to record and document customer issues and questions while knowledge base is list of articles aimed at resolving those cases on salesforce by referring customers to articles that solves their issues while saving the time to focus on more pressing needs of customers.
2. I used the 'service console app' in salesforce to create cases and used the setup on console to carry out 'knowledge base setup'
3. Simplisocial CSM will benefit in using cases and knowledge as it will help them to get organised, save time, onboard new employees and serve customers better and faster.

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

