Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

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Project
Overview

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

Software used: Trailhead playground and salesforce developer account

Task 1: Create New Cases

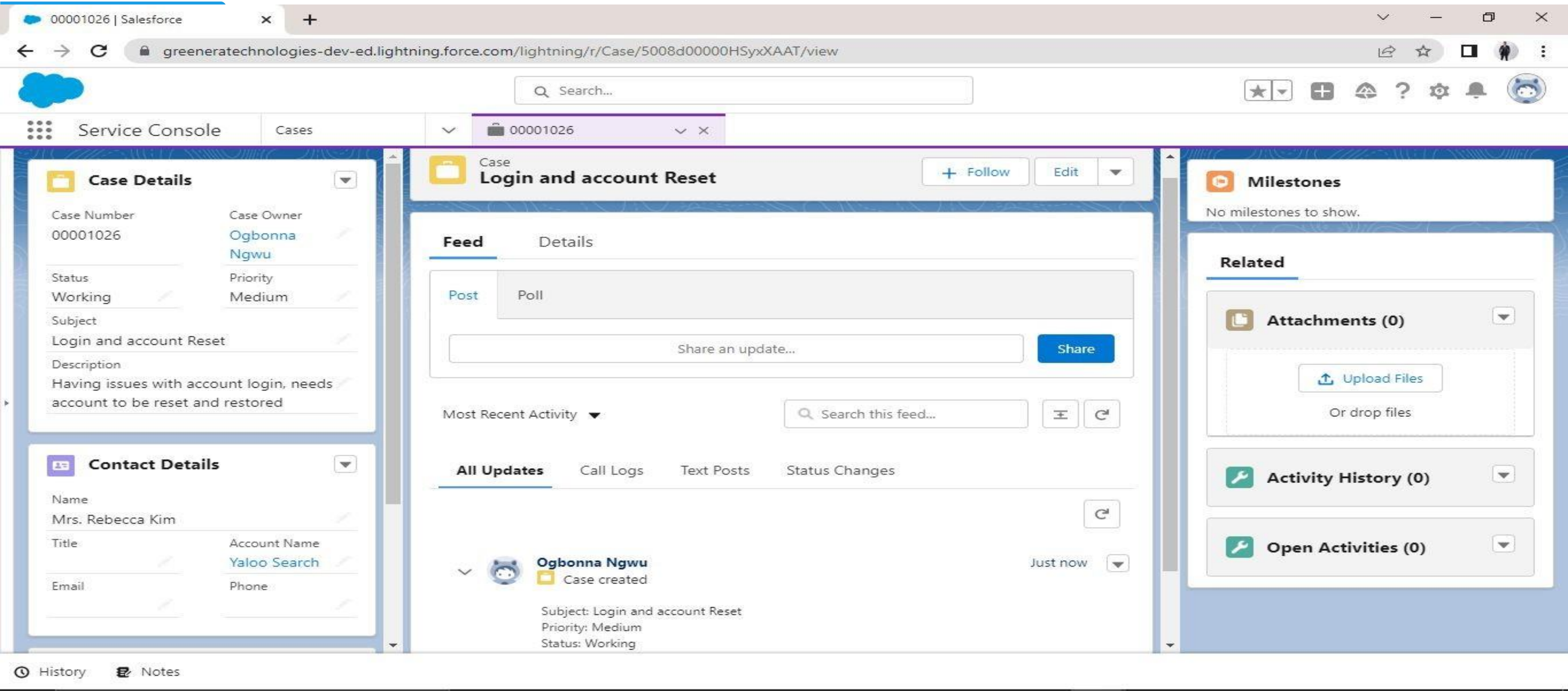
Inserted in the next 4 slides are screenshots of each of the 3 new cases I created just created. I showed the Case Details and Contact Details sections with the Subject, Description, Status, Priority, and associated Contact.

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

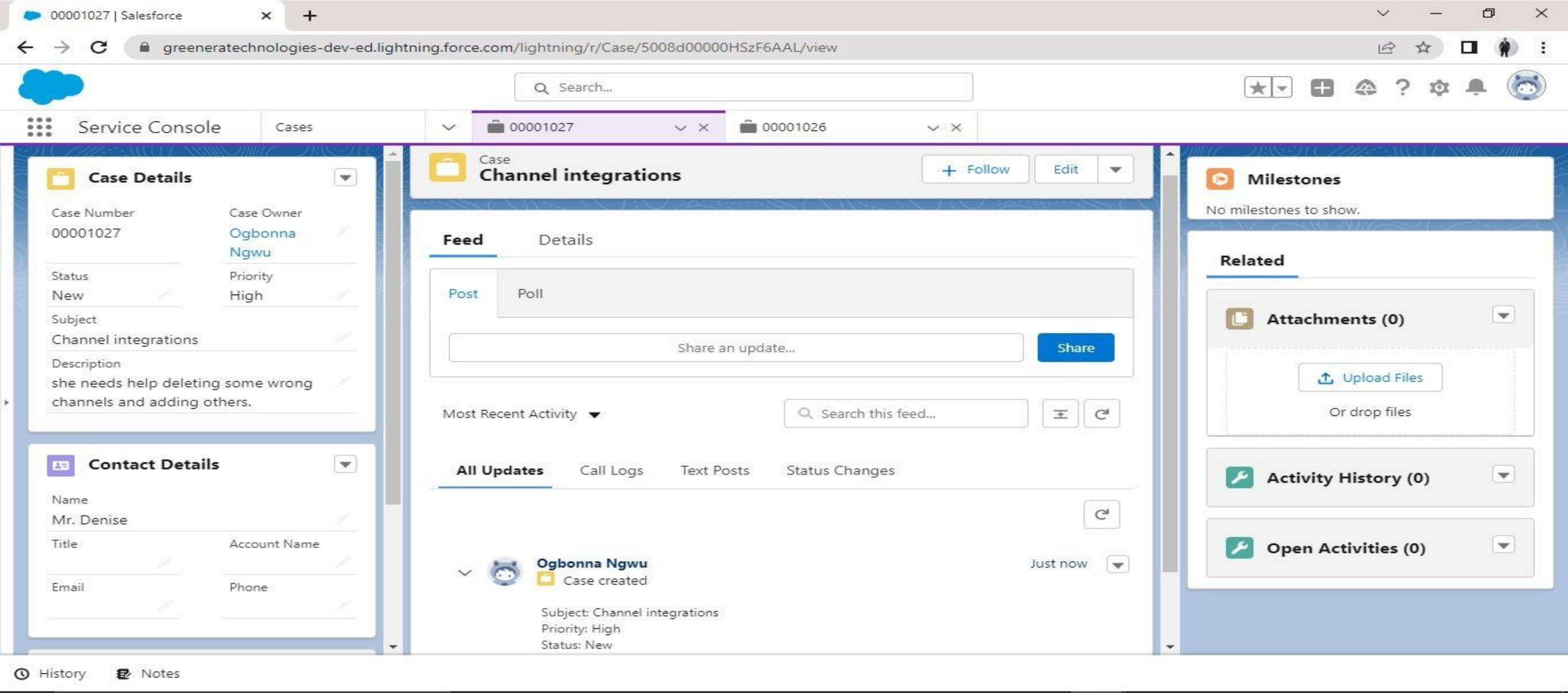
Step 2: The new case created for **Denise Choi**.

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

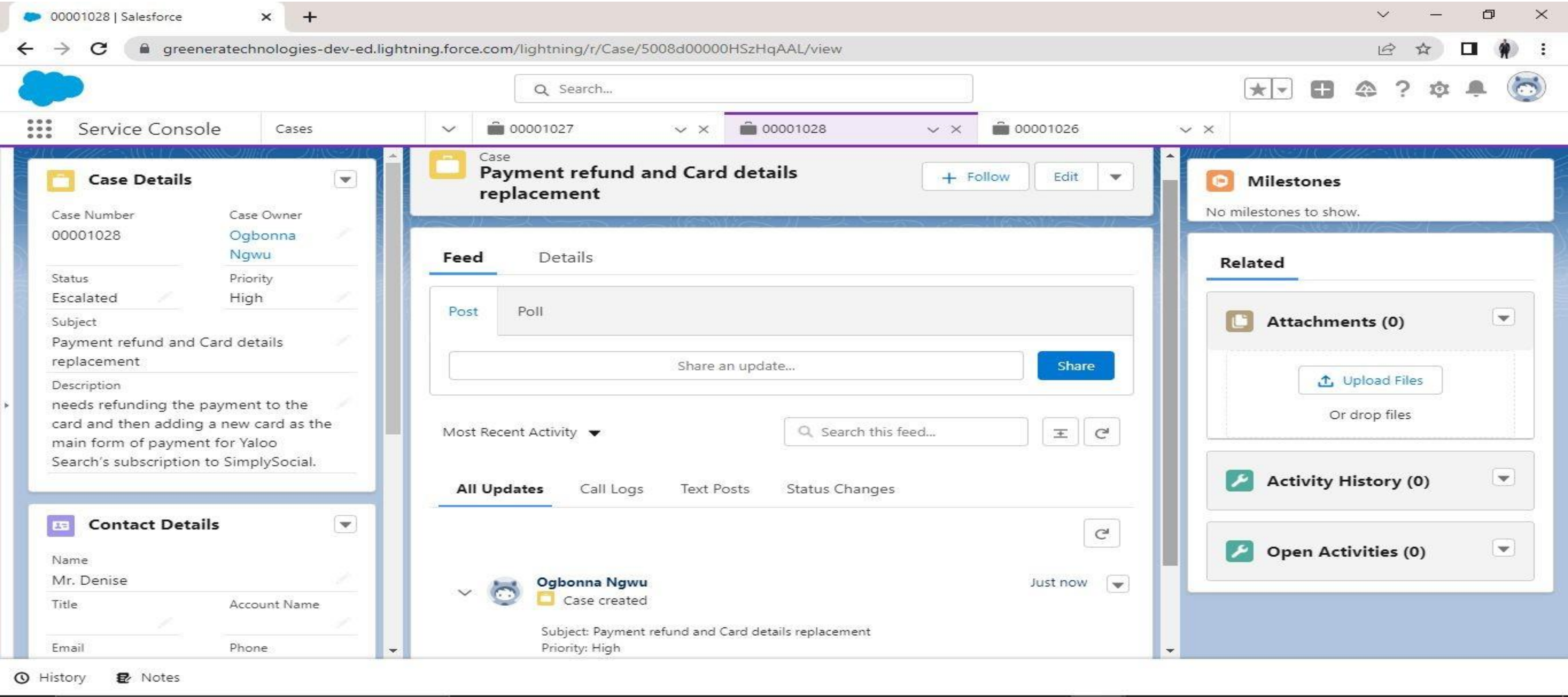
Task 1: Create New Cases

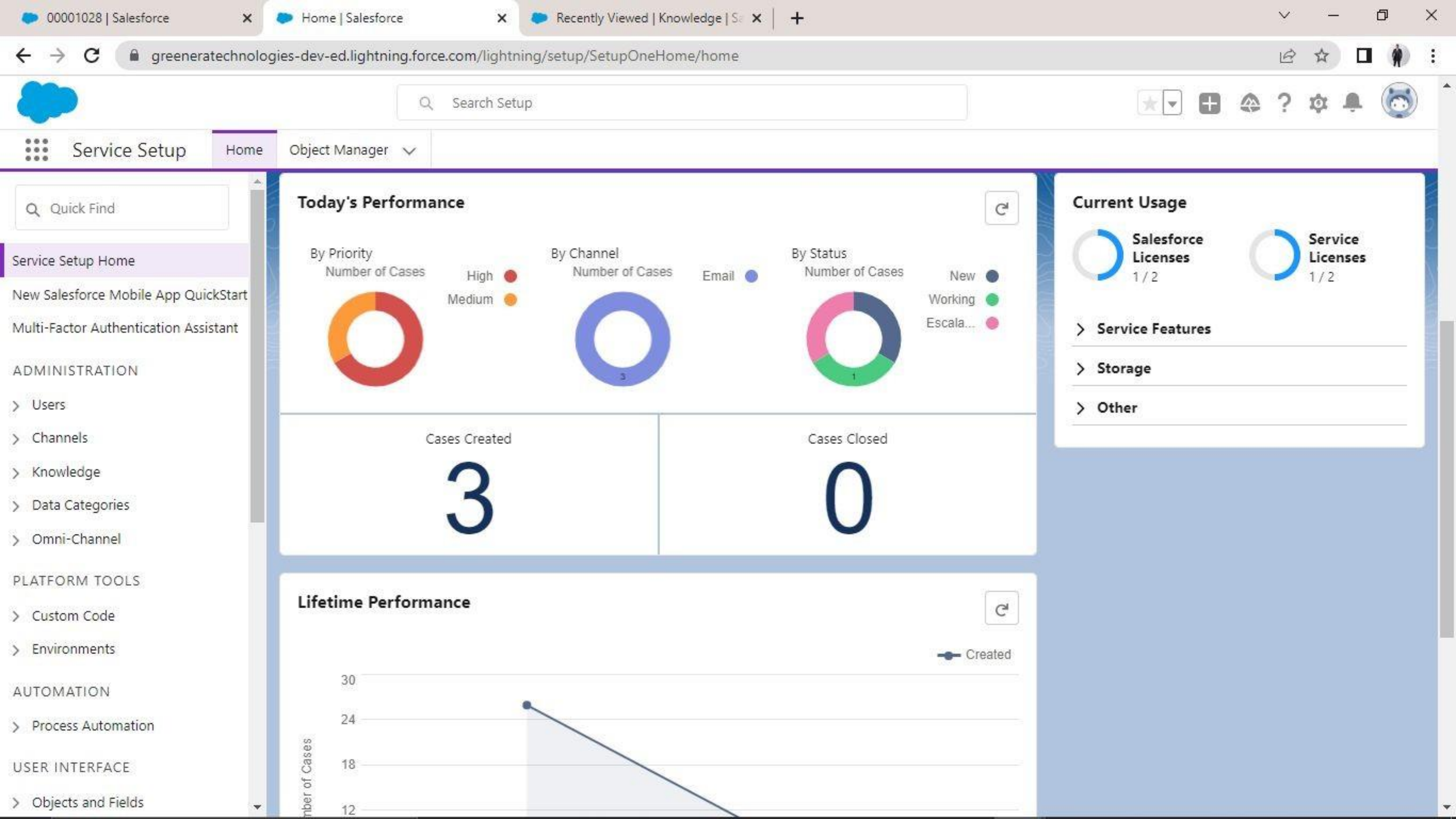


Task 1: Create New Cases



Task 1: Create New Cases

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ADMINISTRATION
Users
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Omni-Channel
PLATFORM TOOLS
Custom Code
Environments
AUTOMATION
Process Automation
USER INTERFACE
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3
Cases Closed
0
Lifetime Performance
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30
24
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12
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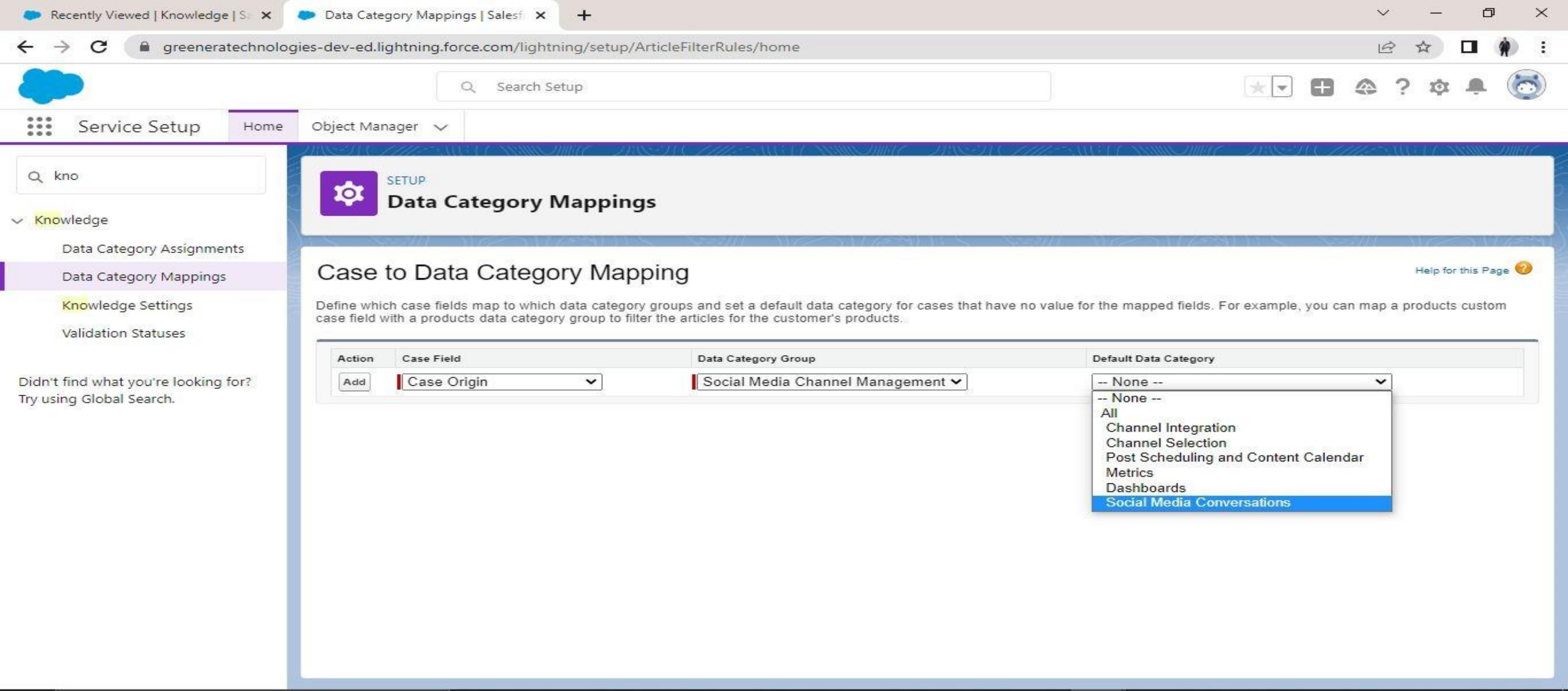
Current Usage
Salesforce Licenses
1 / 2
Service Licenses
1 / 2
Service Features
Storage
Other

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.

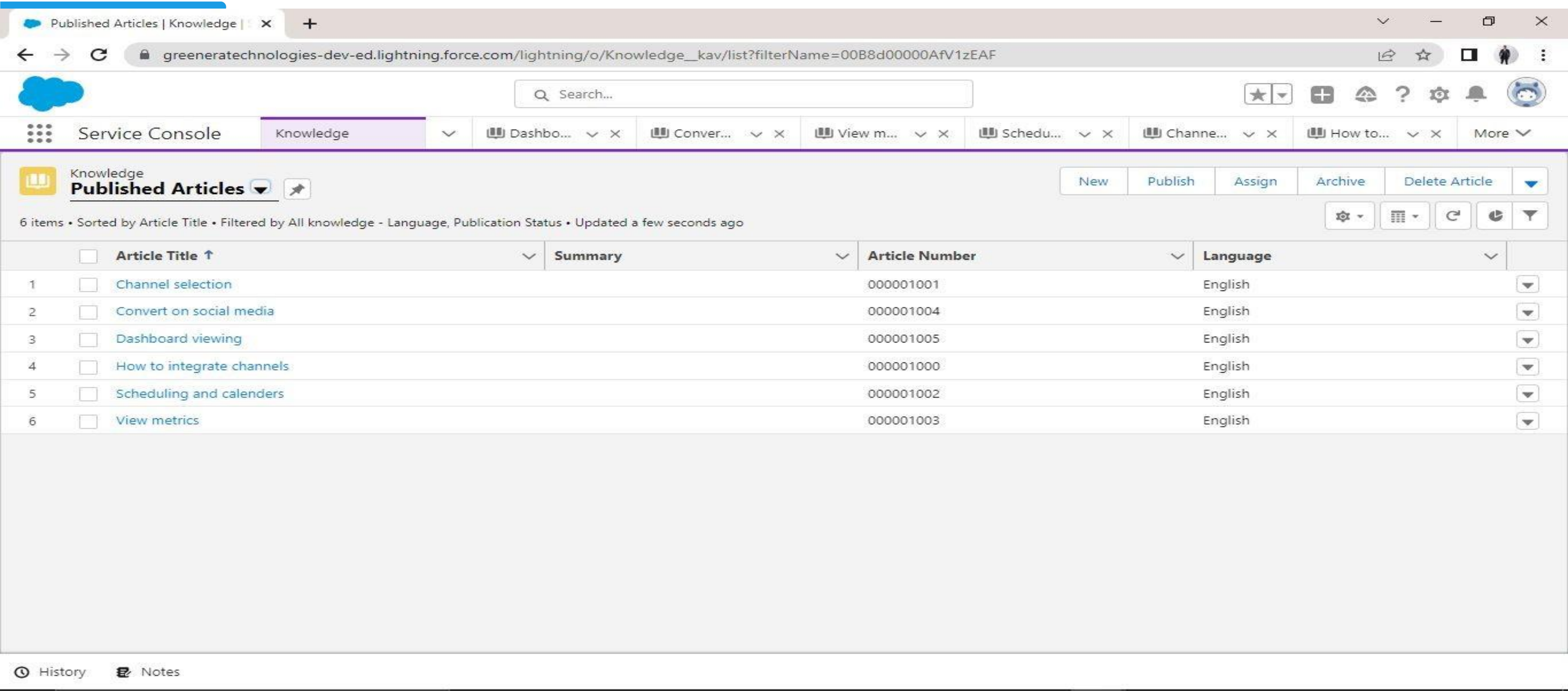
Task 2: Create a Knowledge Base



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



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!