

# Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

*Leonor Duarte*

*16/11/2024*



# 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

# Task 1: Create New Cases

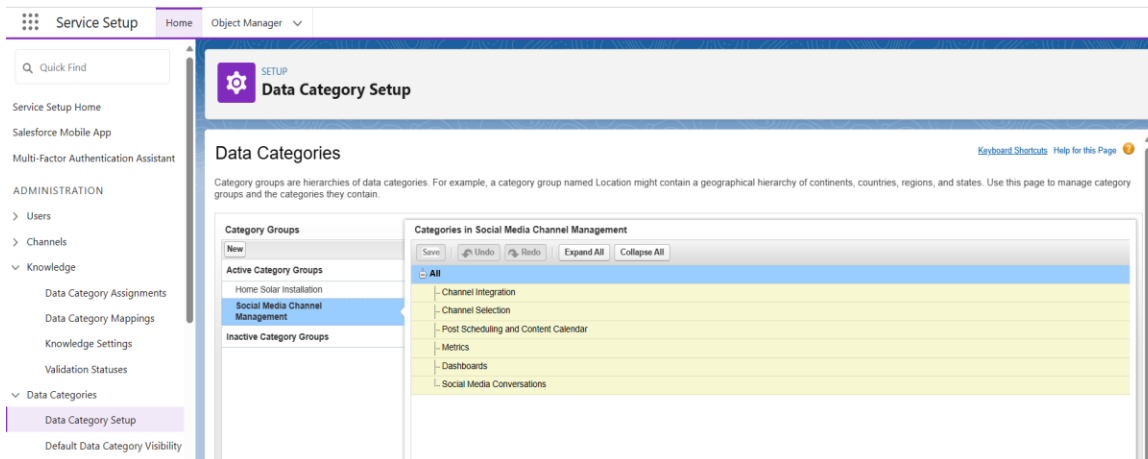


This screenshot shows the 'Case Details' view for Case 00001026 in the Pathstream Service Console. The interface is divided into three main sections: Case Details, Contact Details, and a central Feed/Details area. The Case Details section on the left includes fields for Case Number (00001026), Case Owner (Sitharthan V), Status (Working), Priority (Medium), Subject (Login information), and 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). The Contact Details section below it lists Name (Rebecca Kim), Title, Account Name (Yahoo Search), Email, and Phone. The central area shows the 'Feed' with a 'Post' tab and a 'Share an update...' input field. Below the feed, it indicates 'Most Recent Activity' and shows a recent update by 'Sitharthan V' where a case was created. A 'Milestones' section on the right shows 'No milestones to show'. A 'Knowledge' section at the bottom right indicates 'No results for "" in Knowledge'.

This screenshot shows the 'Case Details' view for Case 00001027. The Case Details section on the left includes Case Number (00001027), Case Owner (Sitharthan V), Status (Working), Priority (High), Subject (accidentally mixed up), and 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). The Contact Details section lists Name (Denise Choi), Title (Director of Marketing Operations), Account Name (Yahoo Search), Email (dchoi@yahooyo.com), and Phone. The central area shows the 'Feed' with a 'Post' tab and a 'Share an update...' input field. Below the feed, it indicates 'Most Recent Activity' and shows a recent update by 'Sitharthan V' where a case was created. A 'Milestones' section on the right shows 'No milestones to show'. A 'Knowledge' section at the bottom right indicates 'No results for "" in Knowledge'.

This screenshot shows the 'Case Details' view for Case 00001028. The Case Details section on the left includes Case Number (00001028), Case Owner (Sitharthan V), Status (Escalated), Priority (High), Subject (new card for payment), and 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 Yahoo Search's subscription to SimplySocial). The Contact Details section lists Name (Denise Choi), Title, Account Name (Yahoo Search), Director of Marketing Operations, Email (dchoi@yahooyo.com), and Phone. The central area shows the 'Feed' with a 'Post' tab and a 'Share an update...' input field. Below the feed, it indicates 'Most Recent Activity' and shows a recent update by 'Sitharthan V' where a case was created. A 'Milestones' section on the right shows 'No milestones to show'. A 'Knowledge' section at the bottom right indicates 'No results for "" in Knowledge'.

# Task 2: Create a Knowledge Base



The screenshot displays the 'Data Category Setup' page in the Pathstream application. The interface includes a top navigation bar with 'Service Setup', 'Home', and 'Object Manager' tabs. A left sidebar contains a 'Quick Find' search bar and a navigation menu with categories like 'Service Setup Home', 'Salesforce Mobile App', 'Multi-Factor Authentication Assistant', 'ADMINISTRATION', and 'Data Categories'. The 'Data Categories' section is expanded, showing 'Data Category Setup' as the active item. The main content area is titled 'Data Categories' and includes a brief explanation of category groups. It features two panels: 'Category Groups' on the left and 'Categories in Social Media Channel Management' on the right. The 'Category Groups' panel has a 'New' button and lists 'Active Category Groups' (including 'Home Solar Installation' and 'Social Media Channel Management') and 'Inactive Category Groups'. The 'Categories in Social Media Channel Management' panel has buttons for 'Save', 'Undo', 'Redo', 'Expand All', and 'Collapse All', and lists categories such as 'Channel Integration', 'Channel Selection', 'Post Scheduling and Content Calendar', 'Metrics', 'Dashboards', and 'Social Media Conversations'.

**Service Setup** Home Object Manager

Quick Find

Service Setup Home  
Salesforce Mobile App  
Multi-Factor Authentication Assistant

ADMINISTRATION

- > Users
- > Channels
- > Knowledge
  - Data Category Assignments
  - Data Category Mappings
  - Knowledge Settings
  - Validation Statuses
- > Data Categories
  - Data Category Setup**
  - Default Data Category Visibility

**SETUP**  
**Data Category Setup**

**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**

- Home Solar Installation
- 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

# Task 3: Create Knowledge Articles



Service Console Knowledge

00001026... 00001027... 00001028... How can I... How can I... How can I... How can I...

Knowledge Recently Viewed

New Publish Assign Archive Delete Article

6 items • Updated a few seconds ago

|   | Article Title  | Summary | Article ... | Published Date       | Public... | Validation... |
|---|--|---------|-------------|----------------------|-----------|---------------|
| 1 | <input type="checkbox"/> How can I respond to comments on my social media posts from within SimplySocial without having to directly open the social media channel? |         | 000001005   | 26/10/2023, 11:57 pm | Published | Not Validated |
| 2 | <input type="checkbox"/> How can I view all my metrics from all my social media channels on one dashboard?   |         | 000001004   | 26/10/2023, 11:55 pm | Published | Not Validated |
| 3 | <input type="checkbox"/> How can I add and remove social media channels from my SimplySocial account?  |         | 000001001   | 26/10/2023, 11:49 pm | Published | Not Validated |
| 4 | <input type="checkbox"/> How can I integrate all of my social media channels onto SimplySocial's platform?   |         | 000001000   | 26/10/2023, 11:48 pm | Published | Not Validated |
| 5 | <input type="checkbox"/> How can I access social media metrics in one place?   |         | 000001003   | 26/10/2023, 11:52 pm | Published | Not Validated |
| 6 | <input type="checkbox"/> How do post scheduling and content calendars work on SimplySocial?  |         | 000001002   | 26/10/2023, 11:51 pm | Published | Not Validated |

## Task 4: Business Case Analysis



- The purpose of a case in Salesforce is to help resolve issues related to the products we sell or the services we provide to our customers. Cases ensure that customer concerns are tracked and addressed efficiently.
- The purpose of knowledge is to publish helpful articles based on the cases that Customer Success Managers (CSMs) resolve. These articles serve as a resource for both customers and internal teams, enabling quicker resolution of similar issues in the future.
- To create a new case, simply navigate to the Case record and click New to start creating the case.
- To create a knowledge article, go to Setup, find Knowledge Setup, and configure it by giving a group name and adding categories relevant to the group. This helps organize the articles for easy access and better usability.