Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

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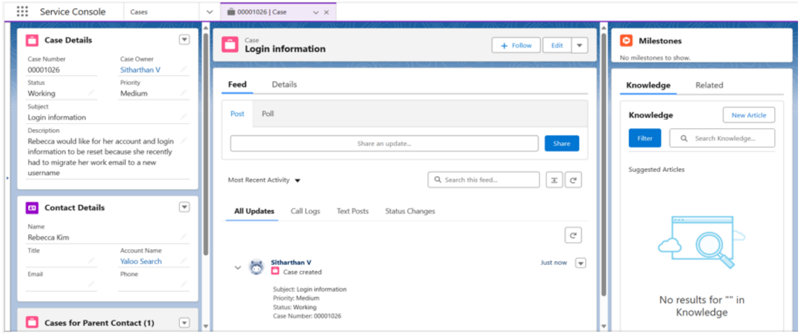
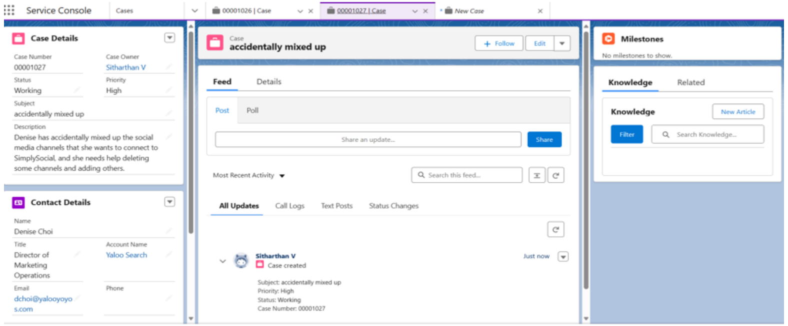
16/11/2024

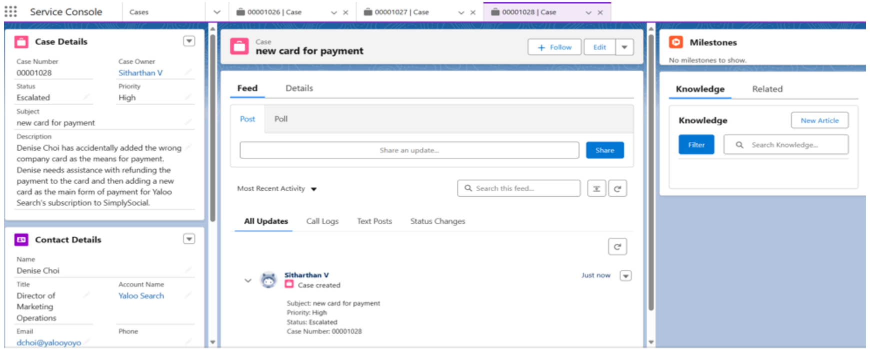
Project Overview

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

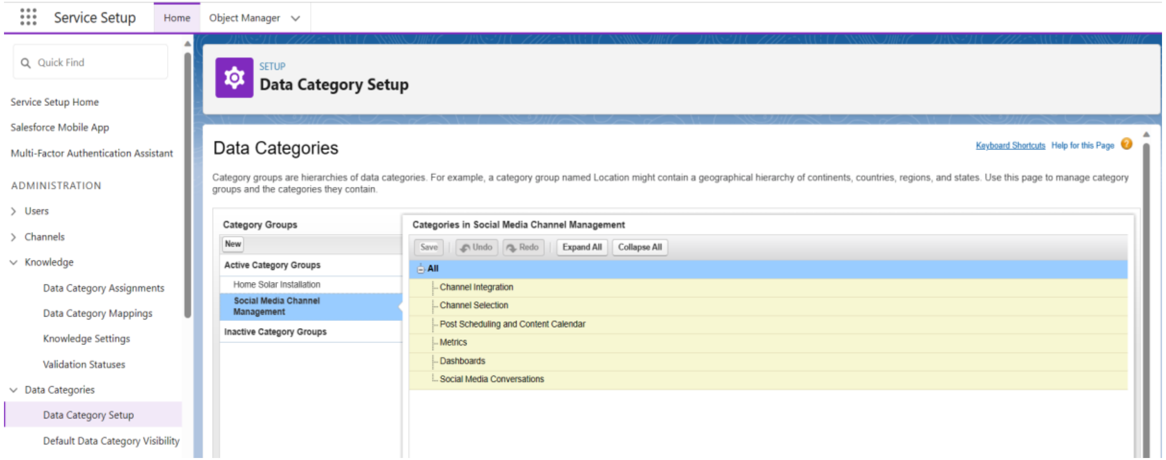




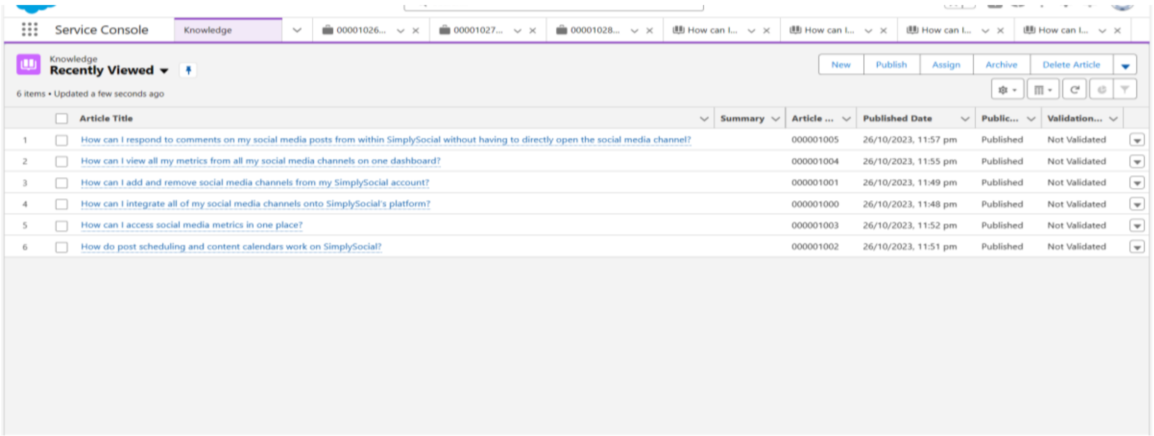


PATHSTREAM

Task 2: Create a Knowledge Base



Task 3: Create Knowledge Articles



	Article Title	Summary	Article ...	Published Date	Public...	Validation...
1	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	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	How can I add and remove social media channels from my SimplySocial account?		000001001	26/10/2023, 11:49 pm	Published	Not Validated
4	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	How can I access social media metrics in one place?		000001003	26/10/2023, 11:52 pm	Published	Not Validated
6	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.