


Customer Success in Salesforce

Independent Project: Use Salesforce to Support Customers

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Project Overview

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- 1 Task 1: Create New Cases
 - 2 Task 2: Create a Knowledge Base
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 - 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

The screenshot displays the Salesforce interface for a specific case. The browser address bar shows the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSyxXAAT/view`. The page title is "00001026 | Salesforce".

The interface is divided into several sections:

- Case Details:** Displays the Case Number (00001026), Case Owner (Ogbonna Ngwu), Status (Working), Priority (Medium), and Subject (Login and account Reset). The Description is "Having issues with account login, needs account to be reset and restored".
- Contact Details:** Displays the Name (Mrs. Rebecca Kim), Title, Email, Account Name (Yaloo Search), and Phone.
- Case Header:** Shows the Case Number (00001026) and the Case Subject (Login and account Reset). Buttons for "Follow", "Edit", and a dropdown menu are visible.
- Feed:** The "Feed" tab is selected, showing a "Post" section with a text input field "Share an update..." and a "Share" button. Below this is a search bar "Search this feed..." and a "Most Recent Activity" dropdown. The "All Updates" tab is selected, showing a list of updates. The first update is from "Ogbonna Ngwu" (Case created) with the subject "Login and account Reset", priority "Medium", and status "Working".
- Milestones:** A section titled "Milestones" with the message "No milestones to show."
- Related:** A section titled "Related" containing three sub-sections: "Attachments (0)", "Activity History (0)", and "Open Activities (0)". Each sub-section has a dropdown menu and a button to "Upload Files".

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

Task 1: Create New Cases

The screenshot displays the Salesforce Service Console interface for a new case. The browser address bar shows the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSzF6AAL/view`. The console is divided into several sections:

- Case Details:** Displays the case number (00001027), owner (Ogbonna Ngwu), status (New), priority (High), and subject (Channel integrations). The description is: "she needs help deleting some wrong channels and adding others."
- Contact Details:** Displays the contact name (Mr. Denise), title, account name, email, and phone number.
- Channel integrations:** The main section for the case, showing a feed and details. The feed includes a "Post" tab and a "Poll" tab. A "Share an update..." input field and a "Share" button are visible. Below the feed, there is a search bar for the feed and tabs for "All Updates", "Call Logs", "Text Posts", and "Status Changes".
- Milestones:** A section for tracking milestones, currently showing "No milestones to show."
- Related:** A section for related items, including "Attachments (0)", "Activity History (0)", and "Open Activities (0)".

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

Task 1: Create New Cases

The screenshot displays the Salesforce Service Console interface. At the top, the browser address bar shows the URL: `greeneratechnologies-dev-ed.lightning.force.com/lightning/r/Case/5008d00000HSzHqAAL/view`. The console header includes a search bar and navigation icons. The main interface is divided into several sections:

- Case Details:** Located on the left, it 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:** Below Case Details, it shows Name (Mr. Denise), Title, Account Name, Email, and Phone.
- Case Header:** At the top of the main content area, it displays the Case ID (00001028) and the Case Name (Payment refund and Card details replacement), along with buttons for Follow, Edit, and a dropdown menu.
- Feed:** The central section, currently showing the 'Details' tab. It includes a 'Post' button, a text input field for 'Share an update...', and a 'Share' button. Below this is a search bar for 'Search this feed...' and a 'Most Recent Activity' dropdown.
- Related:** On the right side, it lists 'Attachments (0)', 'Activity History (0)', and 'Open Activities (0)', each with a dropdown arrow.
- Activity Feed:** At the bottom, it shows a recent update by 'Ogbonna Ngwu' with the text 'Case created'. The subject is 'Payment refund and Card details replacement' and the priority is 'High'.

The bottom of the console features a 'History' and 'Notes' section.

Service Setup

Home Object Manager

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



High
Medium

By Channel
Number of Cases



Email

By Status
Number of Cases



New
Working
Escala...

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 | Setup | Data Category Mappings | Salesforce

greeneratechnologies-dev-ed.lightning.force.com/lightning/setup/ArticleFilterRules/home

Search Setup

Service Setup Home Object Manager

Q kno

Knowledge

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

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

SETUP Data Category Mappings

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

	Article Title ↑	Summary	Article Number	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!**

