

Migration to **Salesforce Org** and Building a **Service Console** **Application**



Our Customer

Design and distribute infant sleep accessories for infants and toddlers, that use "Deep Touch" science. This technique extends the security of parental touch, allowing parents to rest and recuperate between cuddles. Babies sleep easier and longer within 1-3 nights



What bothered them

Our customer was following 2 different processes to monitor the business – one for product management and another one for managing customers. Multiple people needed to work in synchronization on different prospects making it difficult to monitor and control. Using different systems, reviewing and replying to queries from customers, managing order processing and logistics issues was taking a lot of their time.



What we did

The customer wanted a system that can manage following:

- | | |
|--|---|
| ✓ Adding previous cases from their previous instance (Desk.com) | ✓ Handling cases, passing them to needed Support Rep, reply to queries, inquiries, etc. |
| ✓ Adding products, previous orders & order history from Shoplift | ✓ Management of all this in a single frame. |
| ✓ Automations for sending emails. | |

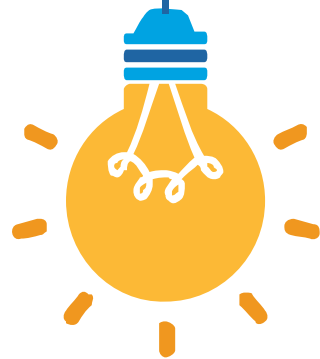
All of these was achieved by using Salesforce Service Cloud feature.

Aress built a robust system, that is simple to operate by resources with minimum number of clicks. The entire implementation process was conducted using an iterative and agile methodology. There were intermediate checkpoints through - show and tell session, to capture users' feedback. Service Cloud features used by Aress for this project are:

1. Case Management:

Tracking of cases that are created/updated as per the needs of customers, until they are closed. Customer issues are usually captured and tracked as cases. Cases can be further classified as: -

- ✓ Email-to-Case ✓ Web-to-Case ✓ Escalation & Auto Response



What we did

2. Knowledge Management:

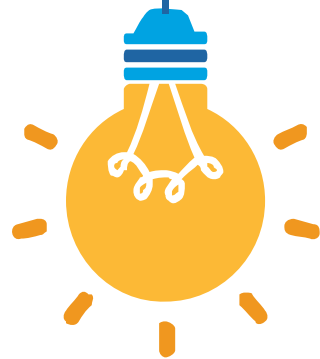
Here the users can edit, create and manage the content. Knowledge articles are documents of information. Customers can go to the company's website and search for solutions. Knowledge articles can be associated with a case before it is closed unlike solutions. A separate license needs to be purchased to use this feature.

3. Service Console:

Agent console provides unified agent experience. It reduces response time by placing all the information together. In a console, you can find everything from customer profiles, to case histories, previous order history – all in one place.

4. Live Agent:

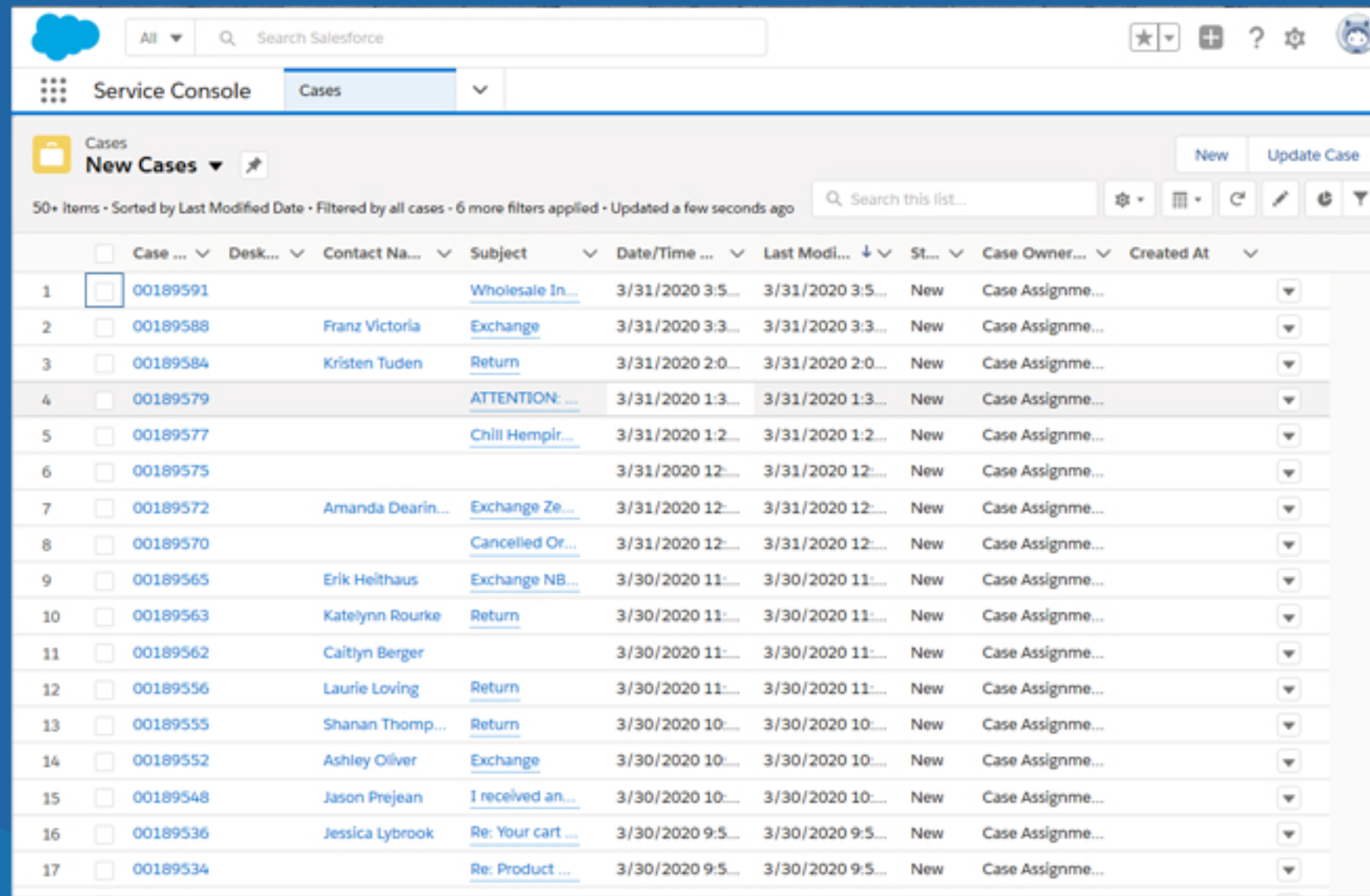
Live agents deal with 1:1 customer interaction. Agents can provide answers faster with customer chat and keyboard shortcuts. They stay totally connected to the customers as their team members are alerted immediately to get the issue resolved. Also, it makes the agents smarter and more productive in the process with real-time assistance. This in turn improves customer satisfaction.



Benefits realized by the customer

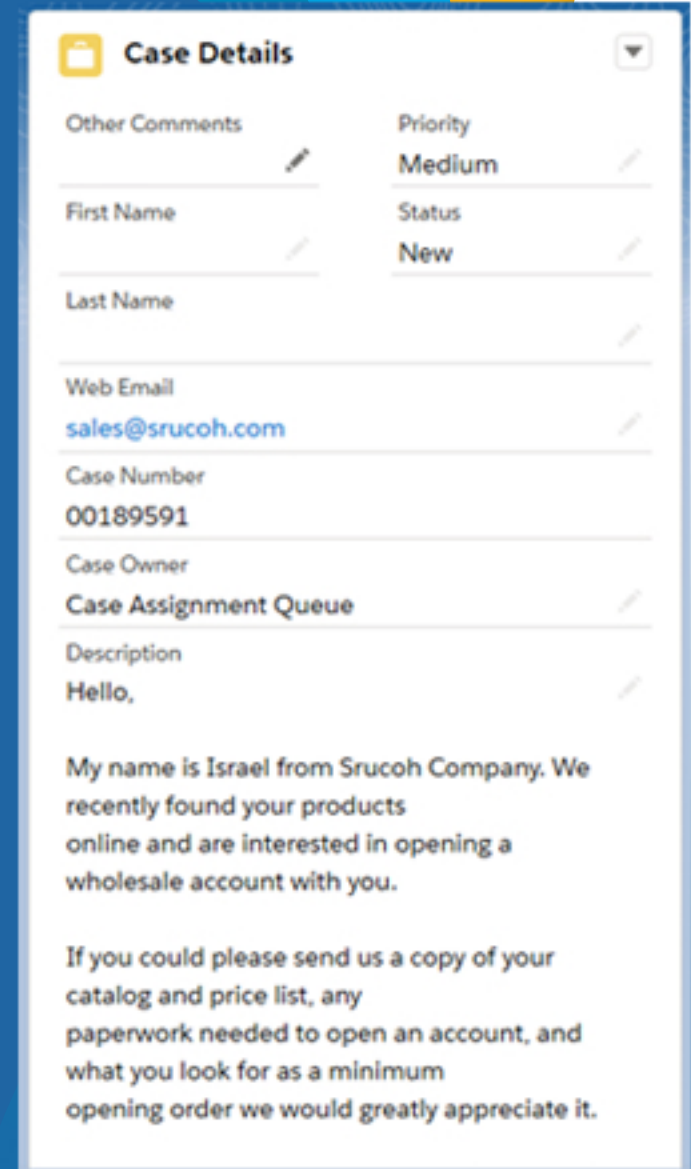
Nesting of all case related information:

It helps customer's Support Reps to get all needed information on the same page & doesn't need to hover over to another tab or page if anything needed.



The screenshot shows the Salesforce Service Console interface. At the top, there's a search bar and navigation tabs for 'Service Console' and 'Cases'. Below the tabs, there's a 'New Cases' button and a search bar for the list. The main area displays a table of cases with columns for Case ID, Subject, Date/Time, Last Modified, Status, Case Owner, and Created At. A dashed arrow points from the first case in the list to the 'Case Details' panel on the right.

Case ID	Subject	Date/Time	Last Modified	Status	Case Owner	Created At
00189591	Wholesale In...	3/31/2020 3:5...	3/31/2020 3:5...	New	Case Assignme...	
00189588	Exchange	3/31/2020 3:3...	3/31/2020 3:3...	New	Case Assignme...	
00189584	Return	3/31/2020 2:0...	3/31/2020 2:0...	New	Case Assignme...	
00189579	ATTENTION: ...	3/31/2020 1:3...	3/31/2020 1:3...	New	Case Assignme...	
00189577	Chili Hemplr...	3/31/2020 1:2...	3/31/2020 1:2...	New	Case Assignme...	
00189575		3/31/2020 12...	3/31/2020 12...	New	Case Assignme...	
00189572	Exchange Ze...	3/31/2020 12...	3/31/2020 12...	New	Case Assignme...	
00189570	Cancelled Or...	3/31/2020 12...	3/31/2020 12...	New	Case Assignme...	
00189565	Exchange NB...	3/30/2020 11...	3/30/2020 11...	New	Case Assignme...	
00189563	Return	3/30/2020 11...	3/30/2020 11...	New	Case Assignme...	
00189562	Caitlyn Berger	3/30/2020 11...	3/30/2020 11...	New	Case Assignme...	
00189556	Return	3/30/2020 11...	3/30/2020 11...	New	Case Assignme...	
00189555	Return	3/30/2020 10...	3/30/2020 10...	New	Case Assignme...	
00189552	Exchange	3/30/2020 10...	3/30/2020 10...	New	Case Assignme...	
00189548	I received an...	3/30/2020 10...	3/30/2020 10...	New	Case Assignme...	
00189536	Re: Your cart ...	3/30/2020 9:5...	3/30/2020 9:5...	New	Case Assignme...	
00189534	Re: Product ...	3/30/2020 9:5...	3/30/2020 9:5...	New	Case Assignme...	



The screenshot shows the 'Case Details' panel in Salesforce. It contains fields for 'Other Comments', 'First Name', 'Last Name', 'Web Email', 'Case Number', 'Case Owner', 'Priority', 'Status', and 'Description'. A dashed arrow points from the first case in the list to this panel.

Case Details

Other Comments

First Name

Last Name

Web Email
sales@srucoh.com

Case Number
00189591

Case Owner
Case Assignment Queue

Priority
Medium

Status
New

Description
Hello,

My name is Israel from Srucoh Company. We recently found your products online and are interested in opening a wholesale account with you.

If you could please send us a copy of your catalog and price list, any paperwork needed to open an account, and what you look for as a minimum opening order we would greatly appreciate it.

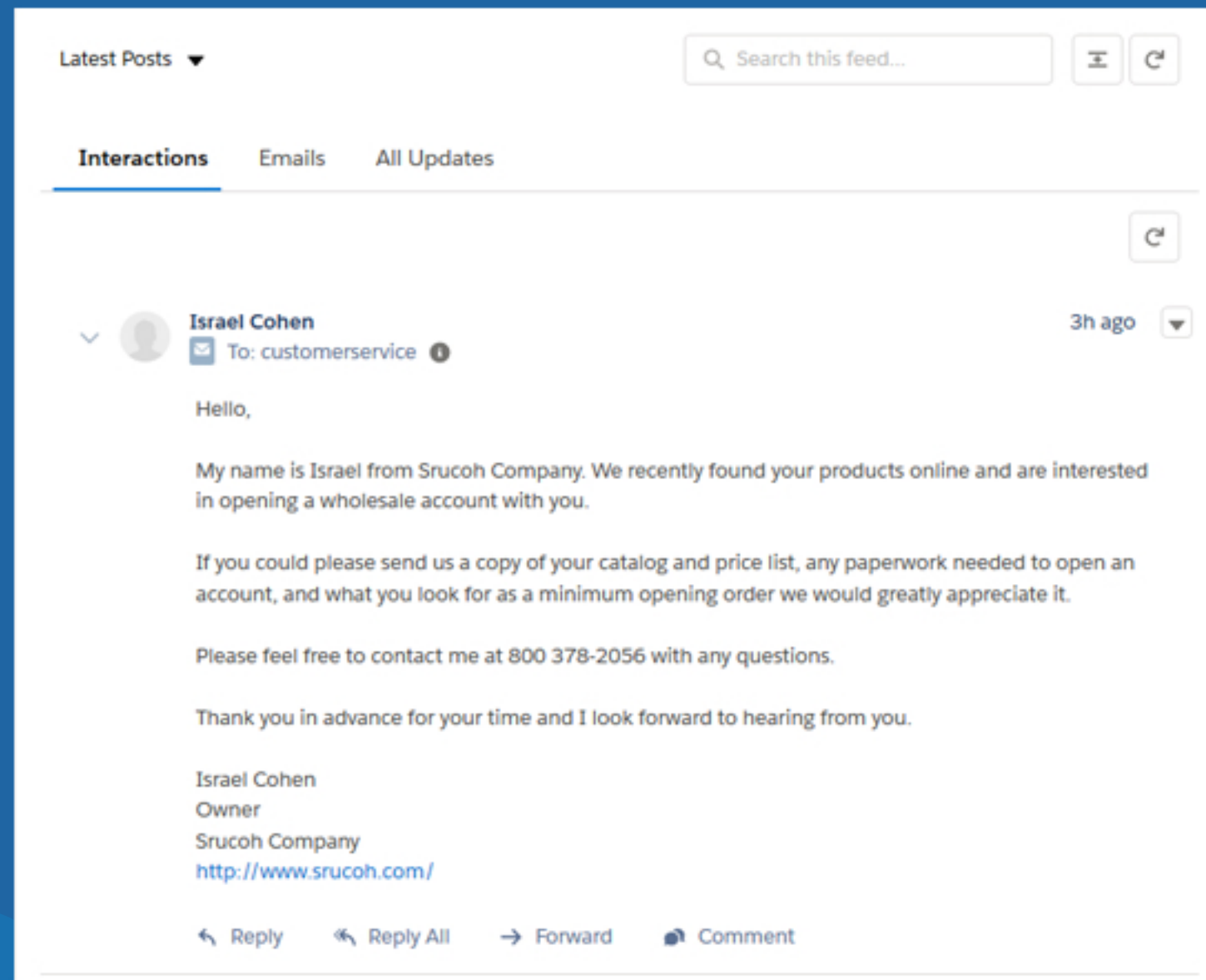
Nesting of all case related information:

It helps customer's Support Reps to get all needed information on the same page & doesn't need to hover over to another tab or page if anything needed.

Benefits realized by the customer

Displaying history of products ordered:

On the same page, the customer's Support Rep will be able to look for the history of transactions of customer as well as conversation that have happened in past.



The screenshot shows a customer support interface. At the top, there's a 'Latest Posts' dropdown, a search bar labeled 'Search this feed...', and icons for editing and sharing. Below this are tabs for 'Interactions', 'Emails', and 'All Updates'. The 'Interactions' tab is selected. A list of interactions is shown, with the first one from 'Israel Cohen' (3h ago) selected. The email content is displayed, showing a customer inquiry about opening a wholesale account. At the bottom, there are buttons for 'Reply', 'Reply All', 'Forward', and 'Comment'.

Latest Posts ▾

Search this feed...

Interactions Emails All Updates

Israel Cohen 3h ago ▾

To: customerservice ⓘ

Hello,

My name is Israel from Srucoh Company. We recently found your products online and are interested in opening a wholesale account with you.

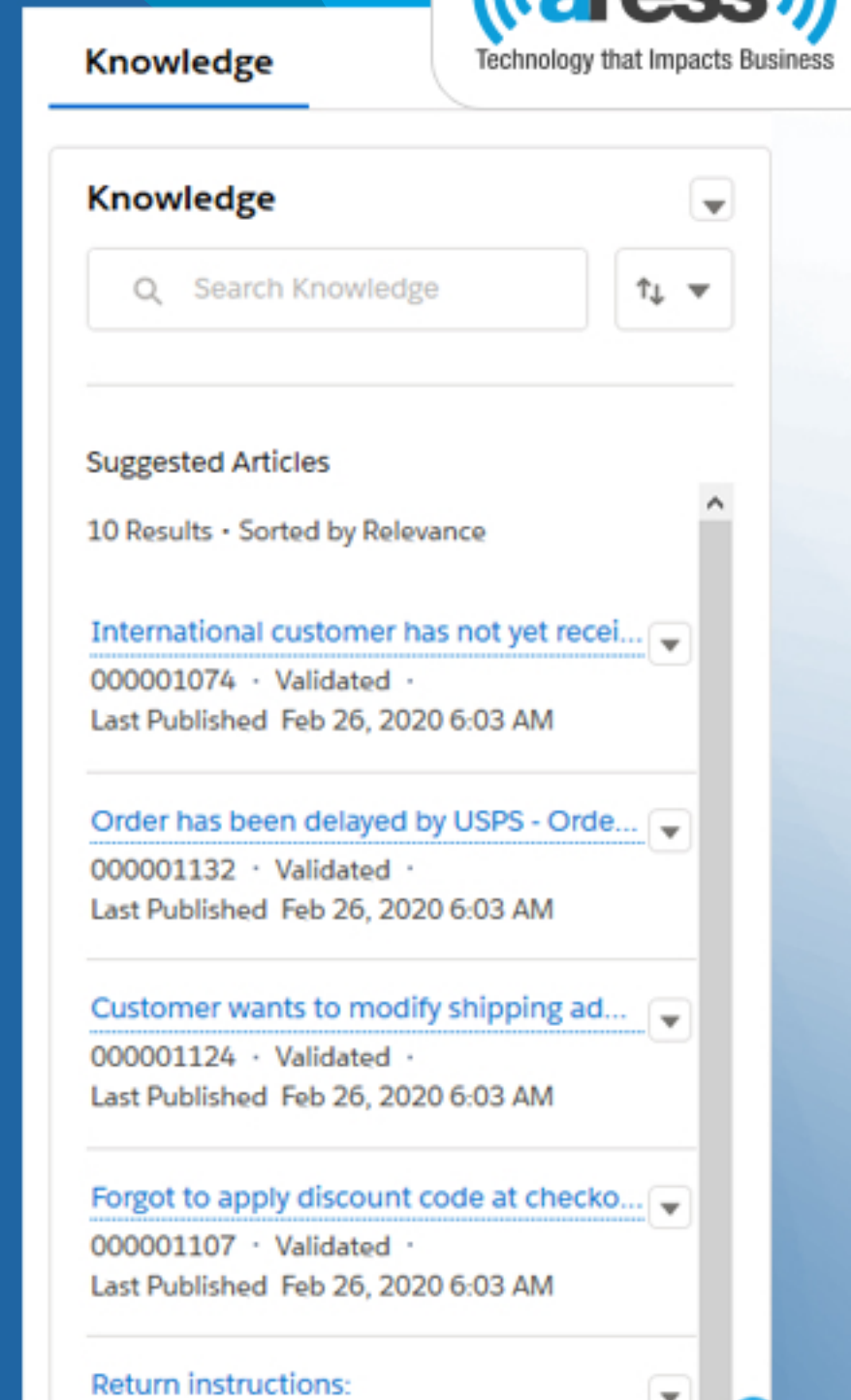
If you could please send us a copy of your catalog and price list, any paperwork needed to open an account, and what you look for as a minimum opening order we would greatly appreciate it.

Please feel free to contact me at 800 378-2056 with any questions.

Thank you in advance for your time and I look forward to hearing from you.

Israel Cohen
Owner
Srucoh Company
<http://www.srucoh.com/>

Reply Reply All Forward Comment



The screenshot shows the Aress Knowledge base interface. At the top right is the Aress logo with the tagline 'Technology that Impacts Business'. Below the logo is a 'Knowledge' section with a search bar labeled 'Search Knowledge' and a dropdown arrow. Below the search bar is a 'Suggested Articles' section with a list of 10 results, sorted by Relevance. The first four articles are visible, each with a title, ID, status, and publication date. A dashed arrow points from the customer email in the previous screenshot to the 'Knowledge' section.

Knowledge

Search Knowledge

Suggested Articles

10 Results · Sorted by Relevance

International customer has not yet recei...
000001074 · Validated ·
Last Published Feb 26, 2020 6:03 AM

Order has been delayed by USPS - Orde...
000001132 · Validated ·
Last Published Feb 26, 2020 6:03 AM

Customer wants to modify shipping ad...
000001124 · Validated ·
Last Published Feb 26, 2020 6:03 AM

Forgot to apply discount code at checko...
000001107 · Validated ·
Last Published Feb 26, 2020 6:03 AM

Return instructions:

Knowledge Articles:

The customer's support rep can check for the solutions to queries raised from customer then & there itself.

Business Value Realized by Customer...

Now, everything is migrated from the 2 systems earlier used by the customer. All the data is available in one platform now developed using Salesforce Service Cloud - Order Information, Customer / Case information, Interactions, & assigning cases to Support Reps. This has resulted in faster turn-around, increased productivity for our customer. The new system is helping in achieving improved customer experience.