

Chapter 16

Managing Your Customer Service Solution

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- ▶ Customizing cases
- ▶ Using case queues and assignment rules
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The heart of any successful customer service application is case management, and Salesforce Service & Support provides a fully integrated solution to track, resolve, and manage all customer interactions, regardless of the point of entry.

Your support team can log in and begin using cases and solutions immediately; but they'll be much more successful if you invest some time upfront to customize the program to the team's exact needs.

In this chapter, we guide the support executive or administrator on setting up case processes and customizing cases. Next, we review how to configure a scalable knowledge base with your collection of solutions. Then, we cover the different methods for automating customer service processes to improve agent efficiency.

Preparing Your Salesforce Service & Support Strategy

As a support executive, if you want to get Salesforce Service & Support working for you, you need to do some careful upfront planning. After you

think through your processes, you can customize cases either by yourself or with your Salesforce Service & Support administrator. Here are some tips to think about before you get started:

- ✔ **Define and prioritize your service and support objectives.**
- ✔ **Identify and acknowledge your key challenges.** Try to identify the biggest ones first.
- ✔ **Start with the end in mind.** The best way to customize your application is to decide what you want to measure first.
- ✔ **Map out your key processes.** If you're a Visio whiz, use that tool. If not, grab a marker and diagram your key processes out on a whiteboard or flip chart. For different types of support issues, think about the similar and different types of information that you want your reps to capture.
- ✔ **Figure out the best approach for your business.** You have many different ways to tackle a business issue with Salesforce Service & Support — some of these approaches work better than others.
- ✔ **Assess how much of your support efforts you and your team can share with your customers.** If your users would welcome this sort of change, you may want to set up the Self-Service Portal or the Customer Portal.
- ✔ **Keep it simple.** Don't sacrifice your objectives just to keep things simple. The more complexity you build, the greater the risk that people won't use the application, however.



For cases, as with other objects, Salesforce Service & Support provides some common design elements that let you customize the record. As you consider customizing cases, keep in mind that you should be striving for ease of use, relevance, and data that can help you manage your support executive job while allowing your agents to efficiently manage theirs. (See Chapter 20 for the how-to details on adding new fields, customizing page layouts, adding record types, and other design tricks.)

Automating Case Management

As a support executive or system administrator with the right permissions, one of your biggest challenges will be managing and administering a growing collection of cases. And because support centers need to maintain customer satisfaction, efficiently opening and resolving cases and keeping customers happy are paramount to your bottom line.

Salesforce Service & Support provides built-in tools to help efficiently queue, route, and escalate cases according to your support needs. By distributing and managing case workload more effectively, you ensure that the right agents address the right cases to comply with internal or external SLAs.

Adding case queues

To set up a case queue, choose Setup⇨Customize⇨Cases⇨Queues, and then follow these steps:

1. **From the Case Queues page, click the New button.**
2. **Complete the required fields for Queue Name and Queue Email.**

The e-mail address will be used for notifications, such as when a new case has been added to the queue. The e-mail can be for an individual or point to a distribution list.

3. **Move Available Members into the Selected Members column to add them to the queue.**
4. **When you're finished, click Save.**

The Case Queues page reappears with your new queue displayed.

Using assignment rules for routing

Assignment rules are the key to efficient and timely routing of new cases. Your team can apply these assignment rules when adding or editing cases, or when customers submit cases themselves through your Web site, e-mail, the Self-Service Portal, or the Customer Portal (see later sections for more on supporting multiple channels). These rules allow cases to route directly to users or queues.



For assignments, escalations, and other support automation tools, don't forget to set up e-mail templates for notifications — both internal and external. See Chapter 7 for tips on customizing e-mail templates.

To set up assignment rules, choose Setup⇨Customize⇨Cases⇨Assignment Rules, and then follow these steps:

1. **From the Case Assignment Rule page, click the New button.**

A New Case Assignment Rule page appears.

If you haven't yet selected a Default Case Owner or Automated Case User, you'll be prompted to make those selections first. A *default case owner* is the person whom the buck stops at — the person to whom the case routes when the assignment rules can't seem to find anyone else. *Automated case users* are the owners of cases that are created by Salesforce Service & Support, as opposed to a manual creation by a human being.

- 2. Type a rule name and select the check box if you want this to be the active rule; then click Save.**

Typically, you have one case assignment rule to serve all your case assignment purposes. So, for example, you may have an active assignment rule called US Standard Support and another called US Holiday Support that you activate only when your holiday schedule is running.

The Case Assignment Rules page appears with your rule listed.

- 3. Click the rule name for the assignment rule you just created.**

The Case Assignment Rule page for your rule appears.

- 4. Click New under the Rule Entries related list.**

A Rule Entry Edit page appears.

- 5. In Step 1 of the Rule Entry Edit page, enter a number for the order of the entry you're about to make.**

Note that Salesforce Service & Support evaluates these rule entries until it finds a match and then stops. The first successful match satisfies the rule, and an assignment is made accordingly.

- 6. In Step 2 of the Rule Entry Edit page, enter criteria for the rule entry.**

For example, if your company provides a different support team for partner inquiries, you might enter a criterion of **Account: Type Equals Partner** to denote cases that relate to partners.

- 7. In Step 3 of the Rule Entry Edit page, select the user or queue to assign the case to and the notification template that goes to the new owner.**

- 8. When you're finished, click Save, or Save & New to set up another rule entry.**

When completed, the Case Assignment Rule page for your assignment rule appears with the related list of rule entries.

Automating case escalation

To make sure that no case is ever overlooked and proper attention is paid to priority cases, you can apply escalation rules. Escalation rules prevent Chicken Little-type overreactions — so you don't unnecessarily run around telling your team that the sky is falling . . . unless it really is. Instead, these rules allow you to create automated actions when cases with certain criteria are still open or untouched after a set duration. When escalating, you set up rule entries (similar to assignment rule entries) to notify users, re-assign the case, or both.

To establish escalation rules, click Setup→Customize→Cases→Escalation Rules, and then follow these steps:

1. From the Case Escalation Rules page, click the New button.

2. Type a name, select the check box if you want this to be the active rule, and click Save.

As with case assignment rules mentioned in the preceding section, only one case escalation rule may be in effect at one time.

A Case Escalation Rules page appears with your rule listed.

3. Click the rule name for the escalation rule you just created.

The Case Escalation Rule page for your rule appears.

4. Click New under the Rule Entries related list.

The Rule Entry Edit page appears.

5. Complete the rule entry fields, following these guidelines:

- See Steps 5 through 7 in the preceding section for tips on completing Step 2 of the rule entry fields.
- In Step 3, check the Ignore Business Hours box only if you want the escalation rules to be in effect at all times (this means weekends and holidays, folks).
- In Step 4, select a radio button to determine how you want escalation times to be set.

6. When you're finished, click Save, or click Save & New to repeat the process for additional rule entries.

The Rule Entry Edit page reappears with a related list for Escalation Actions.

7. Click the New button on the Escalation Actions related list.

An Escalation Action Edit page appears.

8. In Step 1, specify the time criteria in the Age Over (Business Hours) field to trigger the escalation rule.

Notice that you can set escalations to occur after 30 minute intervals.

9. In Step 2, select the user or queue that will be re-assigned ownership of the escalated case.

You may also select a notification template for the recipient.

10. In Step 3, select a user to notify once an escalation occurs.

You must also select a notification template for the recipient.

11. Checking the Notify Case Owner box ensures that the case owner will be notified when one of his or her cases escalates.
12. Use the Additional Emails box to type in up to five e-mail addresses that you want notified of this escalation, as shown in Figure 16-1.

These addresses don't have to belong to Salesforce Service & Support users.

Figure 16-1:
Specifying
actions
related to an
escalation
rule entry.

13. When you're finished, click Save.

The Rule Entry Edit page reappears.

Repeat Steps 8 through 13 as often as needed to add your escalation rule entries, plus corresponding actions.



Another way to automate assigning tasks and sending e-mail alerts within your organization is through workflow rules. Workflow is available to Enterprise and Unlimited Edition customers only; for details, see Chapter 20.

Building the Knowledge Base

Consider the amount of information and expertise each person in your company holds. Salesforce Service & Support's knowledge base feature helps you build a central repository of that valuable information so your customer service agents can tap into it at any time.

Solutions properly collected over time create a *knowledge base* in which the wisdom of product experts is retained and shared for both internal and external audiences. New agents can get up to speed quickly, and the support team can follow a process that standardizes solutions handling, which both

contribute to speedier case resolution and more consistent responses. A *public knowledge base* is one searchable by customers from your Web site. In the following sections, we quickly highlight the ideal review process for ensuring the highest quality and most accurate solutions for your knowledge base.

Defining the review process

To make sure the most appropriate solutions are clearly and concisely written for your knowledge base, your support team should adhere to a solutions review process. Generally, this involves drafting a solution; having someone review it for accuracy, grammar, spelling, and all that other English-class stuff; and then finally approving the solution for use.

Determine who may submit a solution for review, and then decide who should review it. The *solution manager* can be one or more members of your support team that will be in charge of reviewing, modifying, and publishing solutions to the knowledge base.

Defining categories

By identifying solution categories, you can substantially improve the chances that agents and customers can get to the right answer quickly as your knowledge base grows.

Customizing solutions

You can customize the solutions record much the same way you customize other records in Salesforce. (See Chapter 20 for details.) But before diving in to add fields and change picklist values, take some time to evaluate what's out there so far.

Writing solutions

After a member of your support team has verified that a solution is needed for a specific inquiry and doesn't already exist, he or she should write a draft solution for review. No, the solution shouldn't be a manifesto or a college essay, but it should meet certain guidelines in language, structure, searchability, accuracy, and categorization.

Reviewing solutions

To maintain a consistent and high level of quality for your knowledge base, we recommend solution managers follow these general guidelines during the solution review process:

- ✓ **Check for duplicate solutions.**
- ✓ **Update the solution status.** After reviewing the solution, edit the record and update the Status field, as appropriate.
- ✓ **Publish the solution.** Check the Published and Visible in Public Knowledge Base fields to make the solution available to customers.

Publishing your knowledge base

You know what customers' common questions are. You can significantly reduce related cases and first-call issues if you make the answers accessible and searchable to them by adding a special search box and button to your Web site that allows customers to search your solutions knowledge base without having to contact your support center.

Capturing and Associating Cases Efficiently

In addition to using the phone, customers want to access support in two other common ways: directly from the Web and via e-mail. You can have your customers use a Web-based form or let them send an e-mail to your support organization. For either method, Salesforce Service & Support can enable these additional channels and make it easy for your agents to follow up. In this section, we describe the various options you can use to begin collecting this information from your Web site.

Where do customers go when they have problems? Many customers would be happy if they could simply log the problem and be assured of a prompt response. With Web-to-Case, you can quickly generate an HTML form that captures cases submitted from your Web site. Then, by using case assignment rules, new cases can route directly to the agents or queues responsible for handling these inquiries. (See "Using assignment rules for routing," earlier in this chapter, for information on automating assignments.)

To automate Web-to-Case, choose Setup⇨Customize⇨Self-Service⇨Web-to-Case and follow these steps:

1. **From the Capturing Cases from Your Web Site page, review the general outline, and then click the Generate the HTML link.**

The Capturing Cases from Your Web Site: Capture Cases page appears.

2. **Type a return URL where the users will end up after submitting their cases, choose if you want the form to be visible in the Self-Service Portal so customers can submit new cases while monitoring existing ones (more on that later), select the case fields to include on the form, and click Generate.**

The return URL you specify usually leads to a thank-you page or your support home page. After you click Generate, a new page appears with the HTML code in a box.

3. **Copy and paste the HTML code into a page hosted on your Web server. Click Finished when done.**

You'll want to review the notes at the top of the HTML, but this step is pretty simple. If such a review seems foreign to you, simply copy and paste the HTML into an e-mail and send it to your Webmaster for help with this step. He or she knows what to do.

Once you click Finished, you'll return to the Capturing Cases from Your Web Site page.

When the Web page with your case-capturing form is live, fill out the form, like the unformatted sample in Figure 16-2, and test it to make sure the case routes to the right resource.

Figure 16-2:
Testing an unformatted sample Web-to-Case form.

The screenshot shows a web form with the following fields and values:

- Contact Name: Test Test
- Email: [Redacted]
- Phone: [Redacted]
- Company: Test Company
- Type: Problem
- Status: New
- Case Reason: New problem
- Subject: Test
- Priority: -None-
- Description: [Empty text area]
- Submit Query: [Button]



When customers have issues, they often want to send an e-mail to your support team and expect a timely response. With Email-to-Case, customers can send e-mail messages to aliases you create, which route new cases directly to the assigned resources and populate relevant case fields. Even attachments stay attached to the original e-mail message. Setting this up does require an installation of an Email-to-Case agent, which is a Java toolkit available on the Force.com Developer Tools page at <https://wiki.apexdevnet.com/index.php/Tools>. Under the Email Tools section, click the Email to Case Toolkit link for more information.



Salesforce Service & Support can also route responses to your customers after they've submitted a case by using the Web or e-mail. This response informs the customer that your company has gotten his or her submission, and it can explain support policies, too. As long as you have those e-mail templates defined (see Chapter 7), you can assign them to use when responding to cases from Web-to-Case, Email-to-Case, or even the Self-Service Portal or Customer Portal. Choose Setup⇨Configure⇨Cases⇨Auto-Response Rules to configure this.

Helping Customers Help Themselves

You'd be surprised by how many customers would like to get the answers themselves (if they knew where to go), rather than call you. If you're creating a knowledge base already, you can actually take the next step in providing a Self-Service Portal to your customers. With the Self-Service Portal, customers can find solutions from the public knowledge base, submit cases (with attachments and comments), collaborate with your support agents, and track the status of their cases. In the following sections, we show you how to jump-start the launch of the portal and allow your customers to get on board.



Before implementing the customer Self-Service Portal, make sure your internal knowledge base is up to snuff. That is, your knowledge base must be populated with answers to many common customer inquiries, and the solutions must be well written and appropriate for public consumption.

Launching a Self-Service Portal

No matter what size support organization you run, by creating a secure, authenticated portal for your customers, you can have a professional online presence in minutes. With the Self-Service Portal solution, you have a means of providing real-time insight into the steps being taken to resolve cases. You also deflect inquiries that customers can answer on their own, while still maintaining high levels of quality service.



Make sure your corporate logo is saved in the Document Library before you upload it into the portal header.

To jump-start your Self-Service Portal, choose Setup⇨Customize⇨Self-Service⇨Self-Service Portal⇨Settings, and then follow these steps:

1. From the Self-Service Setup page, click Jump Start.

A Setup Your Organization's Self-Service Portal introduction page appears.

2. Review the benefits and click Continue.

The Setup page appears in Edit mode.

3. Complete the fields, as shown in the example in Figure 16-3, to determine your portal's look and feel, and then click Save.

Most of the fields are self evident; they control the basic look and feel of tabs and page headers.

4. From the Self-Service Jump Start page, click the various buttons to test out your portal.

Here are some tips to test out your portal:

- Click Generate if you need a demo username and password to log in to the portal.
- Click Access the Self-Service Portal if you'd like to access the portal immediately.
- Click Invite if you'd like to grant access to other users to test out the portal.
- Copy and paste the URL highlighted in red into a browser to view the login page.

Remember to send the URL to your Webmaster so that he or she can create a link from your Web sites.

5. Click Done when finished.

The Self-Service Setup page appears with related lists for Portal Page Sections, Pages, and Top Solutions.

6. Click the Action links on the related lists to further customize parts of the portal.

The Edit and Preview links in the Action column are obvious, but click Page Layout if you wish to customize the Case page layout. (See Chapter 20 for details on modifying page layouts.)

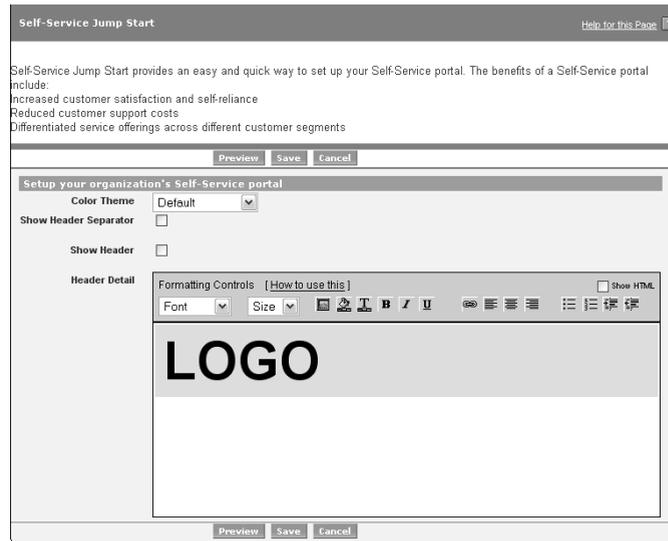


Figure 16-3:
Jump-starting a Self-Service Portal.

The Add links in the Top Solutions section allow you to select up to five solutions to display at the top of the Self-Service Portal. Use this to provide answers to frequently asked questions.

7. Click the Self-Service Setup button if you want to further modify settings.

A Self-Service Setup Edit page appears.

Managing Self-Service users

After you thoroughly test your Self-Service Portal, you want to make it available to customers.

To add, edit, or reset users, choose Setup⇨Customize⇨Self-Service⇨Self-Service Portal⇨Users, and then follow these tips:

- ✓ Click Edit next to a User Name if you want to modify a user's information.
- ✓ Select multiple users with the check box column; then, click either Edit User(s) or Reset Password(s) to perform those actions.
- ✓ Click Enable New User(s) if you want to grant access to the Portal to new users.



Another way to add users is to go to a Contact detail page and click the Enable Self Service button at the top of the contact record.

Launching a customized Customer Portal

Think of the Customer Portal as the Self-Service Portal on steroids. If your business deals with several types of customers, each requiring a customized Portal interface, you can create them. For example, maybe your platinum customers need Portal access to report on very specific information captured in custom fields that don't apply to your regular customer base. Or maybe you're dealing with a large set of customers testing out the newest version of your product, and you need them to provide specific feedback that isn't normally captured for your current products. You can also use a Customer Portal if your company has built or downloaded some additional custom objects that you want your customers to access.



Organizations that use either the Customer or Partner Portal can also enable Salesforce Ideas, which allows your community of customers or partners to create, vote for, and comment on ideas related to any topic on which you want to gather community feedback.

You can use the Customer Portal for an additional charge. For more specific information on setting this up, make sure you organize your knowledge base and solutions, and then go to the Help & Training section in the top-right area of the application and search for the Salesforce Customer Portal Implementation Guide for the latest information on rolling this out.

Improving Team Productivity

For those of you who may operate a support center in which you handle a high volume of support issues, you may have a strong desire to make your agents' time as productive as possible. What information can you put at their fingertips to help them resolve that case that much faster? In the following sections, we review a time-saving option that may be a good fit for your team.

Using the Salesforce Console

High-volume call center agents need access to a lot of information at once. Fewer keystrokes mean resolving a customer's issue takes less time. From a single Web page, the Salesforce Console allows an agent to view all of his or her cases, handle a single case, and see all the records — including accounts, contacts, and opportunities — that relate to a case. The Salesforce Console lays out an interface within a tab in Salesforce, designed to be a one-stop desktop for your agents.

Setting up the Salesforce Console

We highlight the basic steps you need to take to get the Salesforce Console up and running in the following sections. Try to walk through a scenario in which an agent handles a new case and sees it to closure from within that Console. Check out the Help & Training section in Salesforce, under Console, for more details on the following summaries.

Creating your Console layouts

Go to Setup⇒App Setup⇒Console⇒Console Layouts to create a new layout that defines which objects your agents will see in the console.



See Chapter 21 for more information on layouts and assignment rules.

Customizing your mini-view

Mini-views are summary previews of a record that you can see when you hover your mouse over the record name. Before you tell Salesforce what fields in a record comprise a mini-view, you'll have to choose those objects. Once you've selected these objects, then you define their layouts — that is, which fields appear where in the preview. Finally, you assign user profiles to console layouts so the right Salesforce users in your organization can see what they need to see in the console.

Adding the Console tab

The final step is adding the tab to your users' view. Decide which set of apps in your AppExchange drop-down list will contain this tab.