



Case Study

Salesforce Service Cloud Implementation & Integration

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Who Are We?



SP Tech is a Salesforce success partner, helping businesses across the globe to Develop, Sustain, and Manage the digital ecosystem for years now.



We were established in 2015, currently working across the USA & India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.



Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

Project Description

Our client needs Salesforce Service Cloud expertise to define route for their customers to raise the ticket and get assigned automatically to the respective agents to meet the SLAs.



Industry

IT Professional Services



Products

Salesforce Service Cloud
DocuSign

About Our Client

Our client is a leading organization working on confidential data. They have Salesforce Service Cloud Implementation in place; however, they are looking forward to adding various new features and functionalities to leverage the maximum benefits from the platform.

Along with that, they want their overall set up to be more secure and safer to be used.

Challenges

The major challenges to offer a comprehensive solution to the client were:

- ✓ How to route the cases created anywhere inside or outside the Salesforce Org?
- ✓ Integration of DocuSign with Salesforce
- ✓ Automation of Process of case creation from the websites' support page directly to the Salesforce
- ✓ How to increase the overall security of the model?
- ✓ Option for single sign-in on Microsoft Azure & Salesforce
- ✓ Migration from Salesforce Classic to Lightning Salesforce Platform

Solutions

- Need to search for the correct routing configuration depending on the requirement as it's a very difficult process to roll back if incorrect routing technique is taken to progress. In addition to that, we needed Apex code for skill-based routing techniques. And programming skills were also a must-have as it's a bit complicated compared to que-based technique; additionally, queue-based technique would not be a good fit for big sized organizations.
- The following processes were needed to be automated – manual generation of the document using a template:
 - Updating the document with client information.
 - Sending the document to get all approvals, manually; using DocuSign.
 - Providing a solution to manage DocuSign templates, signers, approvals and make it configurable
- To automate the process of creating cases through website support pages by maintaining the design, structure, responsiveness and dynamics. In addition to that, the client wanted to implement security by involving Google captcha, hence we offered the apt solution for the same.
- Client wanted to implement multifactor authentication (MFA) on their org for extra layer of security for every user and also in the winter 2020 release, Salesforce recommended this feature to be enabled in all org.
- Client had all the users present on their Microsoft user Azure AD, and they wanted to implement SSO functionality through Microsoft Azure AD so that every user of Azure active directory can get an access to Salesforce through Azure credentials as well they wanted to sync users from Azure to Salesforce.
- Customization of functionalities for Salesforce lightning as Client was not familiar with using lightning apps.

Technical Approach

The technical approach opted by our experts for each of the solutions:

1. We set up an Omni Channel in org by following these steps:
2. Creating a Service Channel,
 1. Creating a Routing Configuration,
 2. Enabling a Queue,
 3. Creating Presence Statuses,
 4. Having Presence Configuration,
 5. Granting access to Profile for Presence Statuses,
 6. Adding Omni Channel.
3. We used case auto assignment rule and case escalation rule to automate the process to assign a case to an agent's queue as and when a new notification gets sent to an agent with details related to the assignment of the case.
4. SP Tech implemented and integrated DocuSign with their Salesforce seamlessly.
With a complete configurable process, we provided them with the below features.
 - a) **Document template** – A document template that can be used again and again.
 - b) **DocuSign tabs** – To help create tabs in a document. The merge field will be placed on documents which get replaced from the SFDC Data.
 - c) **Signer** – To define signers and order of the signers.
 - d) **Document wizard** – To preview the document before sending the document.
 - e) **Reports** – To keep track of all the generated documents and their status along with win rate and commission for Sales Reps.

Technical Approach(Cont.)

5. We implemented the DocuSign Envelope template for the Client.
6. To implement web to case functionality there are two ways:
 - Salesforce API to create a case and
 - Salesforce default functionality web to case. We opted for the second option which is the default functionality of Salesforce.
7. To implement this functionality; first we needed to enable and configure MFA in the Salesforce org, then we needed to create permission sets and give extra access to users in MFA
8. One must set up a way to enable authentication as there are many ways available to enable it such as; 1) Authenticator app, apps like Microsoft Authenticator, Salesforce Authenticator etc. 2) Security key such as physical token like thumb drive log in, bio matrix log in, Yubico app and Google Titan security key.
9. Firstly, we enabled SSO on the Salesforce org and we created an app in Azure, configured it to make a link between both the environments. After that, we had to configure the provisioning in the active directory and also modify the login page of Salesforce for the desired results.
10. Migrating from Salesforce Classic to Salesforce Lightning has a considerable advantage for the business as it increases productivity, build process, and develop mobile applications tools with the lightning flow. It boosts employee productivity by quick access to spreadsheets in fewer clicks. To make Lightning similar to Classic; we had to manually create many functionalities in lightning which were present in classic but not in Lightning, such as:
 - a) Rich Text Notepad
 - b) Functionality to store a file
 - c) There was no way to add hyperlink, we have had to provide by customization
 - d) Lots of quick action buttons need to be added manually. We had to make our client feel comfortable by providing demos and user notes for lightning applications.

Benefits

Clients benefited in various ways, such as:

1. The overall process of addressing customer issues was streamlined and made efficient.
2. The security of the system was increased
3. Routing the cases from web pages directly to the Salesforce was eased now
4. Easy and single login made the process less complicated
5. Lightning migration offered added benefits to the clients in terms of growth

Results

- ☐ Sending documents from within Salesforce and enabling signing documents from anywhere, at any time.
- ☐ Automation of cases through websites saves around 25-man hours a week.
- ☐ User friendly survey emails for service provided allow our client to achieve a real picture.
- ☐ The automation saved time for the company and helped our client land bigger deals resulting in an increase of business by around 30%.

THANK
YOU!

