



## Service Cloud Implementation

### Challenge

- They were looking to implement Salesforce Service Cloud and migrate their customer service platform from FogBugz to Salesforce & wanted to create a “Single Pane of Glass” structure in Salesforce that would allow all information to be accessible by their Sales, Service Delivery, Finance, and Executive teams.
- Also needed a trouble ticketing system where they could create, manage, track, and report on their customer inquiries. It was important that they work with a Salesforce partner who had a high level of Salesforce experience, offered an affordable solution, and who they had confidence would get the job done correctly and on time.

### Our Solution

- CloudChillies began the Service Cloud implementation process by conducting discovery calls to dive into all of their specific Salesforce requirements and gain a complete understanding of business processes. Thereafter created a Solution Design Document, which laid out the modifications we planned to make in Salesforce & then we began implementing those customizations. We added security measures by creating a closed-sharing model, which gives their Salesforce administrator the ability to control user access. We also created customer profiles and set up email and web-to-case auto-response rules, the Service Cloud Agent Console, and entitlement management.
- Once done with implementation we held separate training sessions to train users on general usage, Service Cloud reporting, and how to administer Salesforce. Also provided support package as and when needed.

### Business Benefits

- Migrated from FogBugz and is using Salesforce with ease
- Provided “Single Pane of Glass” model and their customer activity is accessible by all of their teams

### Client Description

US based firm develops intelligent automation and networking applications for Software-Defined Wide Area Networks. Their products focus on providing simple and affordable ways to quickly extend complex corporate networks to remote branch offices. They delivers high-security, high-bandwidth, and real-time applications that are required in today’s workforce.

- Integration of Salesforce with their' trouble ticketing system and marketing automation system, making it easy for to work with their service delivery partners
- Post Implementation Support allowed them to contact CloudChillies with any changes they wanted to make after having time to become familiar with Salesforce

## About CloudChillies

CloudChillies' Salesforce Certified professionals have the knowledge and passion to solve problems - big and small - and deliver Salesforce projects successfully and affordably. We have years of experience in all facets of Salesforce, covering cloud advisory, Salesforce integration services and Lightning platform development.

We assess your needs to provide maximum value through IT to increase your impact and achieve your mission.

 CloudChillies



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