



Leading mobile software company enhances case management experience of their customers

Company Overview

Location	: USA, India
Industry	: Mobile app development
Solution Used	: Appexchange app

Challenge

- * Our client helps companies to be on top of their game in customer support services. Their platform is compatible across multiple devices and can integrate with a number of third-party applications.
- * Our client had many customers who were also Salesforce users. These customers found it difficult to manage their support cases between our client's platform and Salesforce.
- * If a user needed to move cases logged on the support app to Salesforce, they had to do so manually. This was time-consuming and a loss of support personnel productivity.
- * The users faced the additional challenge of maintaining and juggling separate logins for both these systems.

Solution

- * Salesforce's reliability and popularity made it the perfect solution to be factored into our client's platform applications.
- * Our team developed a Canvas based application that can reuse the native UI and existing functionalities of our client's platform.
- * The app was created keeping in mind the security review criteria that Salesforce administers and was published on Appexchange. From the Appexchange, our client's customers can directly install and integrate it with their systems in no time.
- * Once installed, customers can use the client's platform seamlessly within Salesforce. Every time an issue was created or updated on the client platform, it also synced with a Salesforce case.
- * The proposed solution synced FAQs and issues effortlessly between the two systems. Users can leverage the Knowledge Article feature from Salesforce to export articles from Salesforce into the platform as FAQs.

Result

- * Gave our client the capability to introduce mobile-first CRM experience for mobile apps.
- * Offered mobile app support right from within their customers' Salesforce org.
- * Helped users to easily access the client platform, its associated support services and FAQ content from within Salesforce itself.
- * Users can track the cases created in the client platform from within Salesforce. The support agents and supervisors can easily keep track of a case and its progress.
- * The extensive repository of Salesforce Knowledge Articles were exported into the client platform through the app giving customers anytime-anywhere assistance to relevant FAQ content.
- * The ease of accessing platform's Dashboard from within Salesforce and all the backend integration helped improving customer support levels.