INFORGE
Salesforce Specialists

Salesforce
Consulting
Partner

salesforce

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SUCCESS STORIES

BookNook

Booknook is a company in the **Edtech industry**, headquartered in California, with all its employees working remotely. The company offers an online learning platform designed to facilitate tutoring for students and teachers in grades K-12.

Challenge

zendesk
Booknook previously managed their customer support using Zendesk, where they handled support requests via email, chat, and their web form, in addition to maintaining a knowledge base.

salesforce
As Booknook has been utilizing Salesforce as its CRM, all customer and sales data have been managed within Salesforce.

The challenge with Zendesk was its lack of flexibility for desired automation and its disconnection from the sales data in Salesforce. This disconnect prevented Booknook from understanding how support requests impacted sales and which accounts required more attention.

Solutions

The Inforge team conducted a thorough assessment of the Salesforce platform.
Implemented the structure for managing cases, including:

- Custom fields
- Macros
- Different support levels
- Escalation systems

Jira Software salesforce

Integrated **Jira with Salesforce** for bi-directional sync, ensuring seamless communication between the two platforms. Developed a knowledge base website featuring:

- Articles and categories
- Training for the Booknook team on article entry

With **nearshore talent based in Costa Rica and Argentina**, we provide excellent quality people at **competitive prices**, sometimes 50% less than US counterparts.

Our teams are in the same timezone as the US facilitating **communication and collaboration in real time.**

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Solutions

BookNook

Implemented a webform on the KB website for capturing support cases, with features including:

- The ability to add attachments
- Dynamic content in form fields (fields change based on other field answers)

Integrated a chat feature with a chatbot on the website, designed to:

- Suggest answers based on knowledge base articles
- Transfer unresolved queries to a human agent

Training was provided to customer care agents and support staff on the Salesforce platform to ensure smooth operation of all systems.

Reports and dashboards were created to:

- Display response times for support cases and chats
- Compare performance among agents
- Identify cases requiring additional attention

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Contact us:

📞 +1 754 225 5070

✉ info@inforge.us

📍 Hallandale Beach, FL 33009