



Elementum with PositiveEdge Solutions on Salesforce Case Management & Knowledge Base System



PositiveEdge Solutions facilitates Elementum to leverage features of one of the fastest growing technologies in the world – The Salesforce. In order to enhance their present and upcoming business undertakings, PositiveEdge Solutions has addressed Elementum's Case and Knowledge Base Management Solution. We have carefully chosen specialized and highly trained personnel in accomplishing this divergent requirement.

COMPANY OVERVIEW:

Elementum has made Supply Chain Management (SCM) extremely simple. With a unique blend of cloud, mobile and supply chain expertise, Elementum has designed and delivered accurate and real time supply chain information, innovated for today's mobile workforce. As one of the leading supply chain management companies, they enable a single world-wide repository of supply chain data. This saves millions of dollars in license and service costs that must be spent to integrate all of their supply chain partners.

Elementum believes that their supply chain is closely aligned with their business strategy; which in turn helps them to achieve and sustain their business objectives and profitable growth. As part of a rapidly evolving and growing SCM companies, Elementum has ambitiously and effectively managed to deliver their operations.



SPECIALTIES: Elementum is proficient at;

- Supply Chain Management
- Software-as-a-Service
- Order Management
- Risk Management
- Mobile
- Analytics
- Multi-Enterprise
- Multi-Tenant
- Cloud, and
- Big Data

BUSINESS CHALLENGES

Potential businesses confront varied opportunities that demand different solutions. Recognizing and acknowledging them with the best approach becomes important for a continued growth.

Some of the key business needs of Elementum that were addressed by PositiveEdge Solutions are:

- Ability of creating Cases through different channels such as Web, Email and Service Cloud.
 - With this feature implementation, Cases will be generated through different mediums such as Web, Email and Service Cloud. This facilitates the agents to monitor the creation and status of their Cases from the console.
- Implementation of 'Configurable Entitlement' process to track SLAs by Gold/Silver/Bronze, based on *Severity* and *Requestor Location* which helps to calculate *Initial Response / Resolution*.
(Based on severity, SLA calculation can be calendar days or business days.)
 - Entitlements and SLAs are manageable within Salesforce. In this implementation, when a Case is created via web or email, the *Case Support Priority* field will be auto populated based on the *Requestor Severity* and *Support Urgency* fields of that Case.
- Feature to escalate a Case and send notifications when the SLA exceeds 80% of the timeline.
 - PositiveEdge Solutions has created a Case escalation rule to escalate Cases when the configured SLA exceeds 80% of the time difference between 'Respond' and 'Resolution' SLA.
- Achieving the feature of 'Follow up Reminders' for Cases that are aged more than X days, for which no action have been taken.
 - For the Cases that have not been addressed for X days from their creation date, a feature known as 'Follow up Reminders' has been set up within Salesforce, which reminds the agents to follow up on such Cases.
- Implementation of sending CSAT Surveys and capture Responses based on Case Resolution date.
 - In this scenario, bi-weekly survey (CSAT) will be sent to the customer who has raised a Case and their Case is been resolved. Survey email will be sent out with survey link to customers. If more than one Case is created and resolved then only one survey will be send out. System will capture feedback about the service provided by Elementum. Customer Survey captures the below fields:
 - Satisfaction Rating
 - Satisfaction Description
- Accomplishing a feature of 'Create and Publish Knowledge Base' for Internal Users.
 - In order to avail the knowledge built and applied, a feature of 'Create and Publish Knowledge Base' has been achieved by PositiveEdge Solutions. Through this feature, the internal users can access their desired Salesforce articles. Also, these articles are made available to the users when they try to access them from the network outside Elementum. Therefore, this exposes the Knowledge Base on web, to be accesses by the users through external mediums.

- Implementation of Configurable workflows and notifications across multiple departments. And, facility to design organization specific templates to send email notifications.

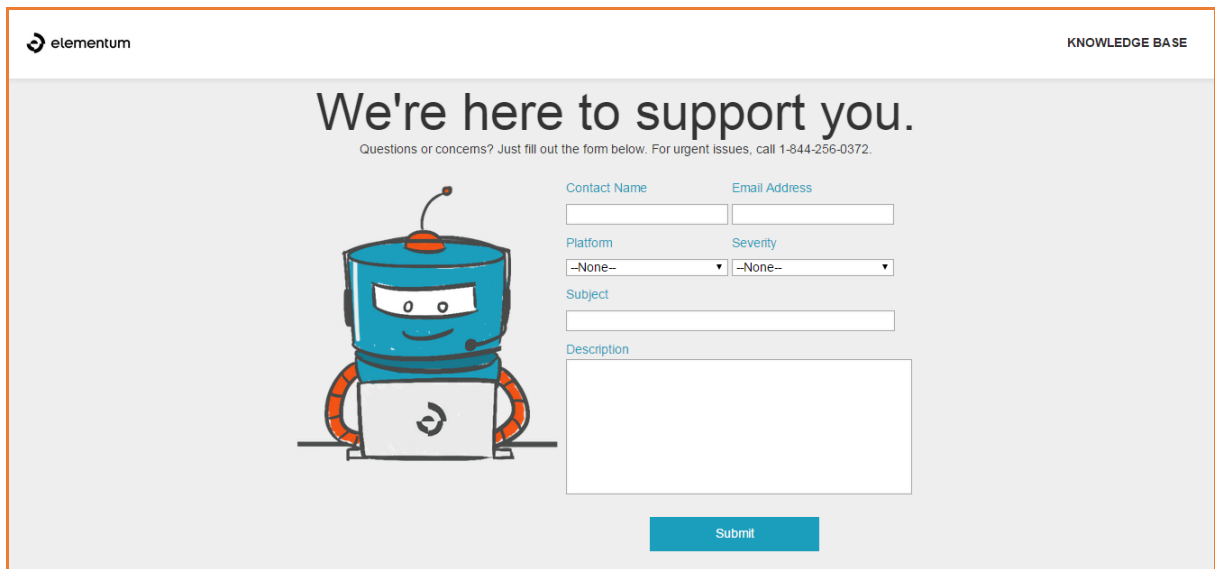
PositiveEdge's Salesforce Solutions

THE SOLUTION

PositiveEdge Solutions (PES) has successfully implemented Salesforce that addresses the business needs of Elementum. PES has provided comprehensive Case management and KB management solution that helps their rapidly growing supply chain management venture. The business objective of implementing Case Management is to create/track Cases, leverage Case life cycle, and receive customer feedback to enhance the customer support & service in a proactive and organized manner.

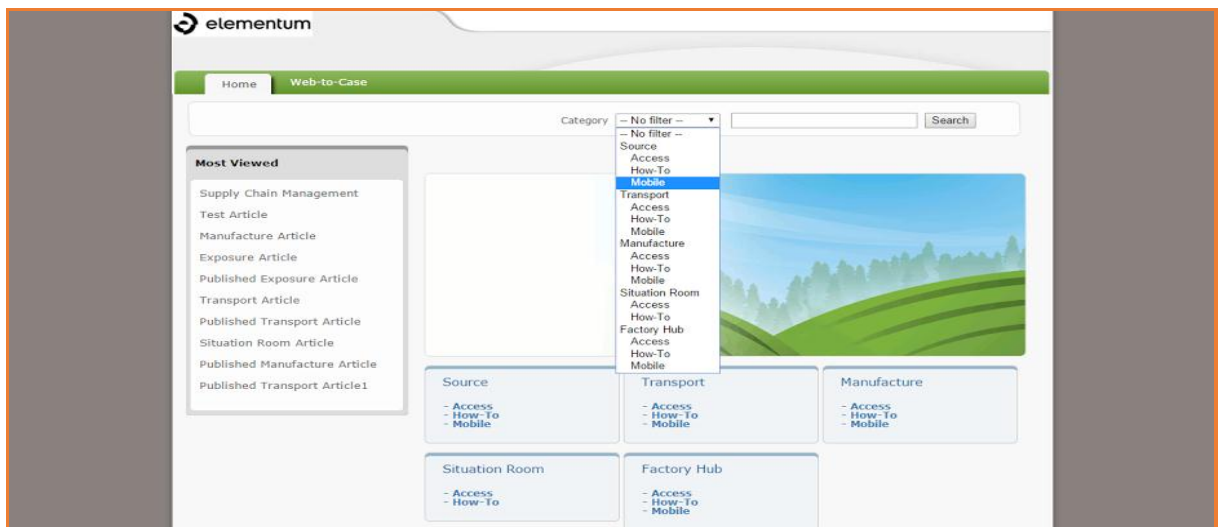
The service cloud of SFDC helped Elementum customers to raise Case through web to Case and email to Case. The Web to KB is providing access of Articles and Solutions to customers.

- PositiveEdge Solution's (PES) CRM solution for Elementum Customer Support and Knowledge Base businesses provides a fresh outlook at simulating and managing growth. It brings to customer support best way to submitting Cases from Email or Web and immediate follow up from customer support.



The screenshot shows a web interface for Elementum's Knowledge Base. At the top left is the 'elementum' logo, and at the top right is the text 'KNOWLEDGE BASE'. The main heading is 'We're here to support you.' followed by a subtext: 'Questions or concerns? Just fill out the form below. For urgent issues, call 1-844-256-0372.' On the left side of the form is a cartoon robot character holding a laptop. To the right of the robot are the form fields: 'Contact Name' and 'Email Address' (text inputs), 'Platform' and 'Severity' (dropdown menus with '--None--' selected), 'Subject' (text input), and 'Description' (a large text area). A blue 'Submit' button is located at the bottom right of the form.

- Knowledge Base equips organizational users to easily create and manage contents known as Articles. The users can quickly find and view Articles they need to resolve a Case to reduce their turnaround time.



BENEFITS

Elementum has achieved significant benefits with Salesforce Solution implemented by PES. The implemented features;

- Provide solution to Customers for creating Case from web site or through sending mail to support email ID.
- Provide solution to Users to follow same process across Cases and help them minimize the Initial Response Time & Resolution Time.
- Help Management to receive notifications, alerts and generate SLA Hit/Miss Report.
- Help Users by sending automated follow-ups, notifications and reminders to increase the productivity.
- Automate the process of sending CSAT Surveys and capture the Response based on Case Resolution date.
- Provide public KB to customers to search solutions themselves.
- Provide a feature for Admins to design and customize the email templates.



- Introduces *Email_to_Case* feature for submitting Cases.

Introducing Email-to-Case

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With salesforce.com, you can efficiently resolve and correspond with customer inquiries via email. Track and view all email threads regarding a customer service issue, and let your customers send inquiries to email addresses that automatically convert customer emails to cases.

Key features and benefits

1. Customer responses regarding a case are automatically associated with the original case, including any attachments the customer sends.
2. Case reporting measures both inbound and outbound emails by case so that you can see how many emails are exchanged before an issue is resolved.
3. Routing addresses allow you to create multiple email addresses from which the contents of customer emails can be converted to case fields.
4. Assignment Rules, Escalation Rules, Workflow Rules and Auto-Response Rules all work seamlessly with Email-to-Case.

- Implements the SLA calculation and complaints through automation.

Entitlement Process

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Entitlement processes let you define timelines that include all of the steps (milestones) that your team must complete to resolve cases. Each process determines how to enforce the correct service levels for your customers.

Before you create entitlement processes, [create milestones](#).

Entitlement Process Detail

[Edit](#)
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Entitlement Process Name	APAC-Process	Active	☒
Version	1	Default Version	☐
Version Notes			
Description			
Case enters the process	Based on case created date	Case exits the process	Based on custom criteria Case: Case Number EQUALS null
Entitlement Process Business Hours	Last Modified By Javier Rendon 7/19/2015 11:56 PM		
Created By	Javier Rendon 7/16/2015 4:59 AM		
Timeline (Minutes)			
Timeline Zoom			

[Chat](#)

REPORTS & DASHBOARDS:

- Personalize data views, dashboards and navigations.
- Use built-in traditional or customizable reports with Report Wizard.
- Report on Hit/Miss ratios for resolution and response time by Severity level.
- Report on average number of SLA achieved Cases.
- Report on '*Average Response Time of Response SLA Achieved*' and '*Average Response Time of Response SLA*'.
- Report based on the time elapsed from the Case creation to the time the Case was closed.
- Report on Case escalation based on its severity.
- Track and measure performance of the organization, business units, teams and individuals.
- Use inline visualizations to gain knowledge on 'Key Performance Indicators' (KPI).

Connect | Contact Information



Connect with us anytime for more information:

E-mail: arunabh@positiveedgesolutions.com ; shiven@positiveedgesolutions.com

Also visit us at www.positiveedge.net