

SERVICE CLOUD DOCUMENT MANAGEMENT

BEST PRACTICES PLAYBOOK



DOCUMENT MANAGEMENT IN THE 4TH INDUSTRIAL REVOLUTION

Why Use Service Cloud?



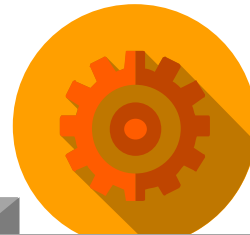
Channel Support

- Enable support inquiries from channel partners where your customers are active, including your website, email, phone, chat, and online communities
- Use automation features to create and assign support cases



Engagement & Productivity

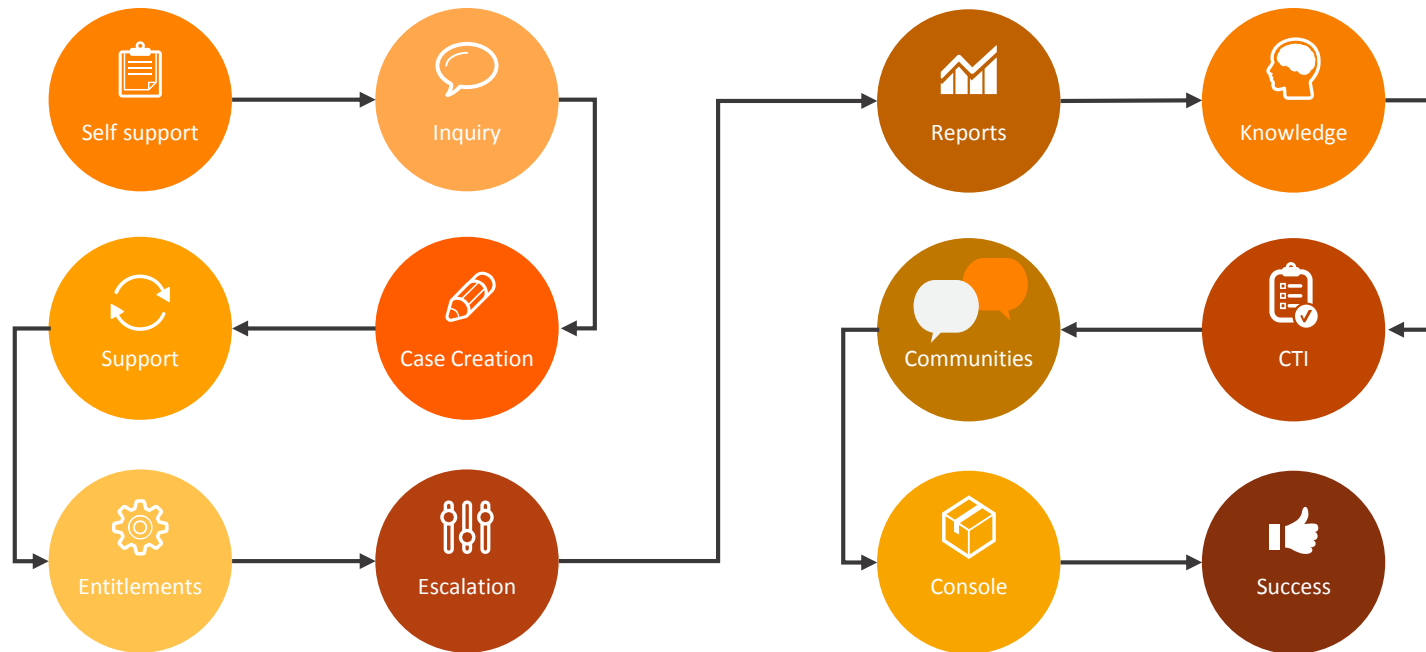
- Promote case deflection through community engagement
- Get a 360-degree view of your customer using the console
- Do more from within the console, including making and receiving phone calls and accessing knowledge articles



Process Management

- Establish support statuses for your support processes
- Set up entitlements to enforce your support processes
- Automatically escalate cases based on the criteria you define
- Monitor your overall support activities through reports and dashboards

What Does Service Cloud Bring?



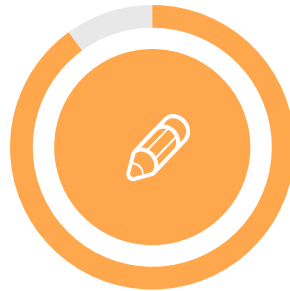
A set of tools to drive service operations excellence in enterprises

Document Management Challenges on Service Cloud



Support on Multiple Channels

Not every customer case gets generated on salesforce



Difficulty on Case Creation

During case creation attaching files that support the case is not trivial



Limits on Sending Large Case Files

There are salesforce governing limits on sending emails with attachments (25MB is the limit)



Inability to Retire Old Case Files

There is no mechanism on salesforce to safely, securely and cost effectively retire old files

How Can S-Drive Help?



Visibility

With easy reach to all files related to cases on Salesforce, enterprises will have better understanding of their customer needs



Accessibility

Enterprises can upload and access files critical to run business from anywhere and at anytime.



Sharing

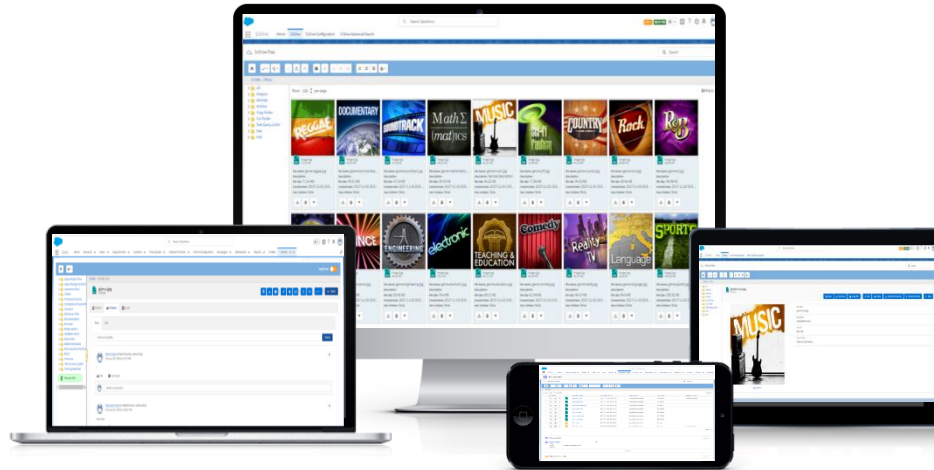
Users having access to files can easily share without having to worry about email size limitations of salesforce



Archiving

Enterprises can archive files based on their retention policy in a cost-effective manner

Where to Test Drive S-Drive?



Highest Rated

With its 4.9 Score, S-Drive is the most beloved Document Management app on AppExchange



Customizable

The most flexible platform to meet your needs on document management.



Simple to Setup

The easiest to setup among document management apps



Support

One of the most recognized customer support

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