

Providing Great Service for your Magento Customers Using Salesforce

May, 2013



Introduction

- Derek Jacobson – Vice President of Ecommerce Solutions at Levementum
 - Gold Magento Solution Partner
 - 2011 Fast and Emerging Partner Award Winner
- Additional Partnerships
 - Salesforce.com
 - SugarCRM
 - Peer 1
 - Bronto
 - Avalara
 - Pardot (Exact Target)
 - Good Data



About Today's Webinar

- Strategy Discussion on best practices
- Discuss customer use cases
- The elements discussed are now part of our Magento ready package



Topics For Today's Discussion

- The Benefits of CRM and customer service tools
- How Magento and Salesforce work together
- The Solution
- Walk through of key features
- Questions and Additional Information



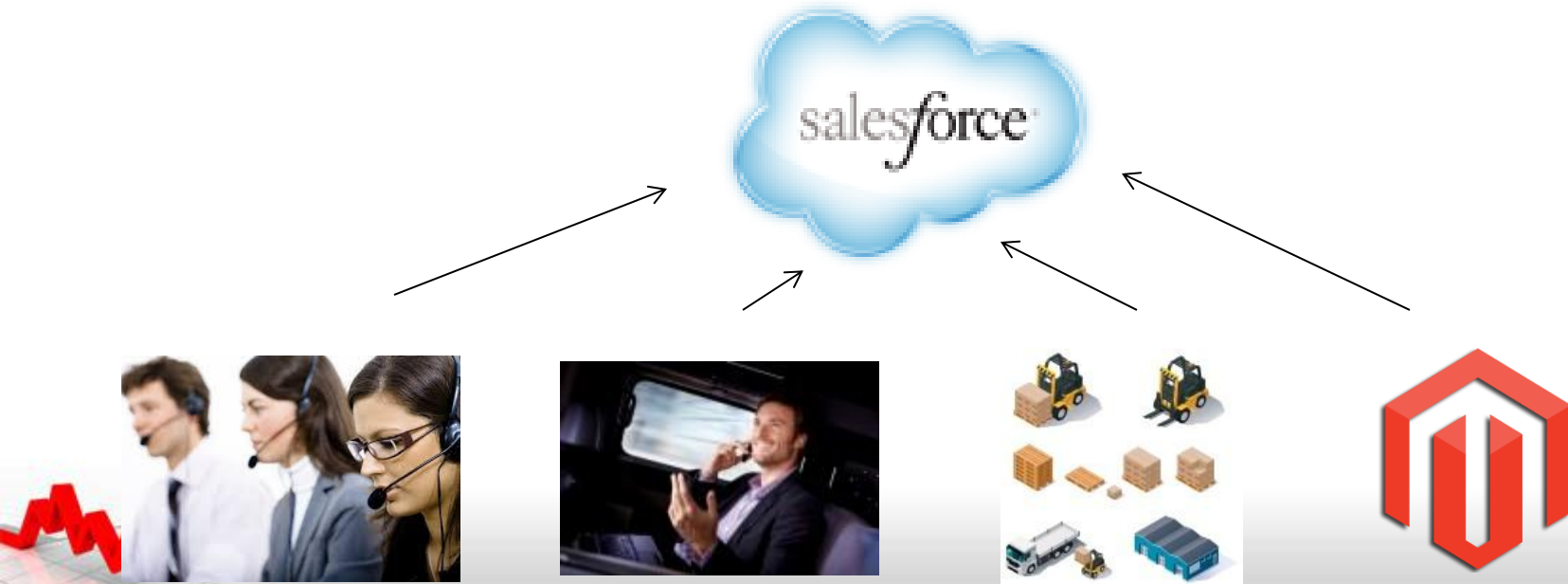
Why Implement a Customer Service Solution?

- Control Multiple Sales Channels
- Standardize operations
- Create an online portal
- *Manage your brand in social media forums*



Why Implement a Customer Service Solution?

- Increase your ability to segment and market to your customers based on all order activity



Why Salesforce?

- Salesforce compliments Magento by providing a complete customer profile

Cases [1] | Open Activities [0] | Activity History [0] | Opportunities [1] | Partners [0] | Notes & Attachments [0]

Person Account Detail

[Edit](#) [Delete](#) [Sharing](#) [Request Update](#)

Account Owner	Integration User (Change)	Account Record Type	Person Account
Account Name	Jane Smith	Phone	8887776666
Customer Id	15	Fax	
Address Id	15	Email	jsmith@gmail.com
Is Default Billing	<input checked="" type="checkbox"/>	Website	
Is Default Shipping	<input checked="" type="checkbox"/>	Processed by Integration	4/10/2013 12:42 PM
Website Id	1	Ready for Integration	<input type="checkbox"/>
Store Id	1		
Group Id	1		

Additional Information

Type	Customer	Employees	
Industry	Retail	Annual Revenue	
Description	Magento Customer		

Address Information

Mailing Address	1234 Main St Las Vegas, Nevada 99999 USA	Other Address	
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System Information

Created By	Integration User , 4/10/2013 12:41 PM	Last Modified By	Integration User , 4/10/2013 12:43 PM
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Custom Links

[Google Search](#) [Google Maps](#) [Google News](#)
[Hoovers Profile](#)

[Edit](#) [Delete](#) [Sharing](#) [Request Update](#)

Cases

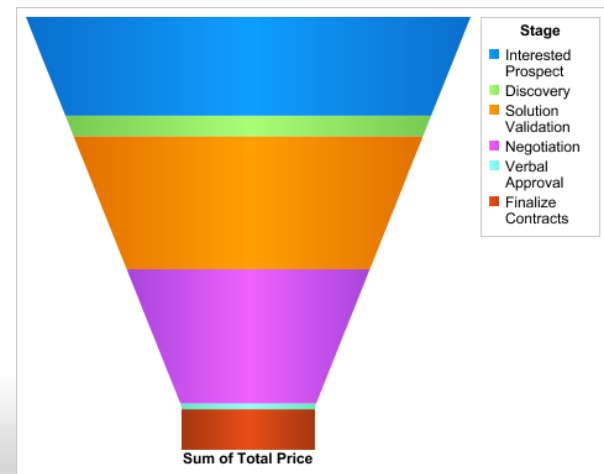
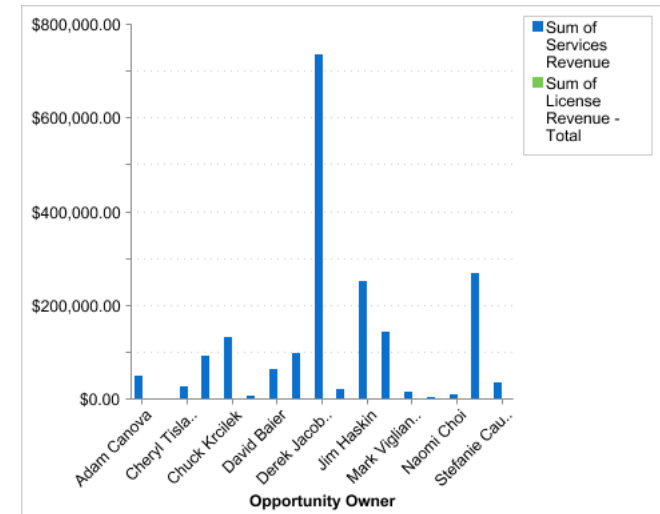
[New Case](#) [Cases Help](#) ?

Action	Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
Edit Cls	00001078		The couch is torn	Medium	4/10/2013	New	Integration User

[Chat](#)

Key Salesforce Advantages

- Case Management
- Supports order and opportunity management
- Integration capabilities including CTI, Chat and Social Media
- Reporting and Dashboards
- Funnel leads & prospects from your site
- 0 infrastructure management



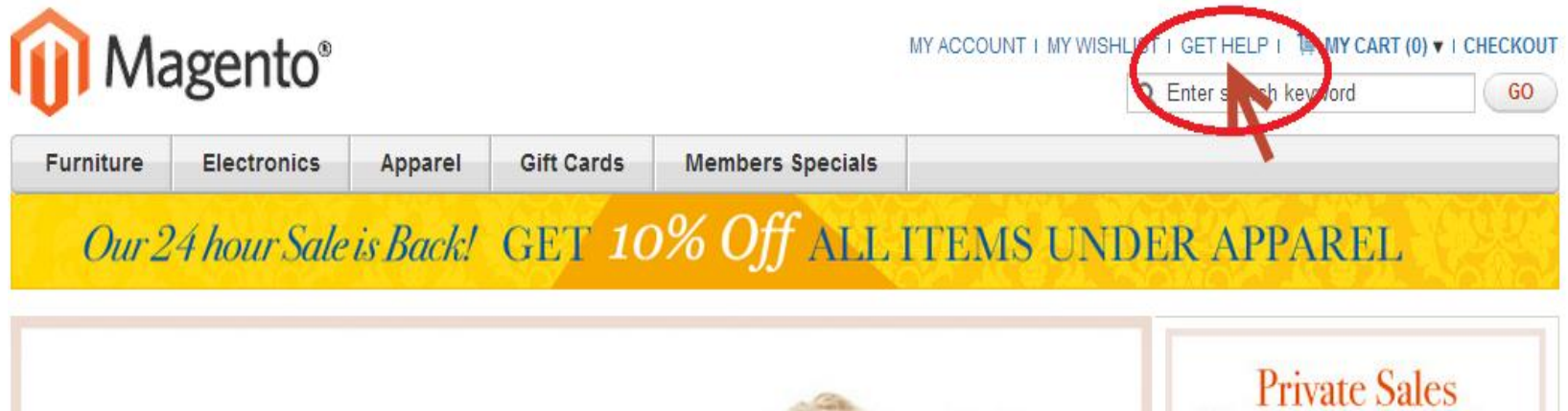
The Solution, How These Applications Work Together

- The key functionality we sought to make available to users include:
 - Consolidate all customer service inquiries
 - Enable case submission from Magento
 - Update Magento case history in real time
 - Feed orders to Salesforce
 - Optionally, expose call center orders in Magento



Customer Service Request Submission

- Levementum's Salesforce package includes a custom module which adds a customer service request mechanism within the site



Logging a Case from Magento




MY ACCOUNT | MY WISHLIST | GET HELP |  MY CART (0) | CHECKOUT

Furniture | Electronics | Apparel | Gift Cards | Specials | Members Specials

Our 24 hour Sale is Back! GET 10% Off ALL ITEMS UNDER APPAREL

My Account	Add Support Ticket
Account Dashboard	Support Ticket Information
Account Information	
Address Book	
My Orders	
Billing Agreements	
Recurring Profiles	
My Product Reviews	
My Tags	
My Wishlist	
My Applications	
Newsletter Subscriptions	
My Downloadable Products	
Store Credit	
Gift Card	
Gift Registry	
Reward Points	
My Support Tickets	

* Reason 
Please select an option.

* Priority

* Support Type

* Subject

* Description

0/4000

* Required Fields

Customer Service Inquiry History

- Once a case is submitted (email, chat, web, phone), we can retain and display a complete history in Magento and Salesforce
 - Regardless of the source of the request, the customer can always track progress
 - Case Status and Aging can be tracked



Customer History

[Cases \[1\]](#) |
 [Open Activities \[0\]](#) |
 [Activity History \[0\]](#) |
 [Opportunities \[1\]](#) |
 [Partners \[0\]](#) |
 [Notes & Attachments \[0\]](#)

Person Account Detail

[Edit](#) |
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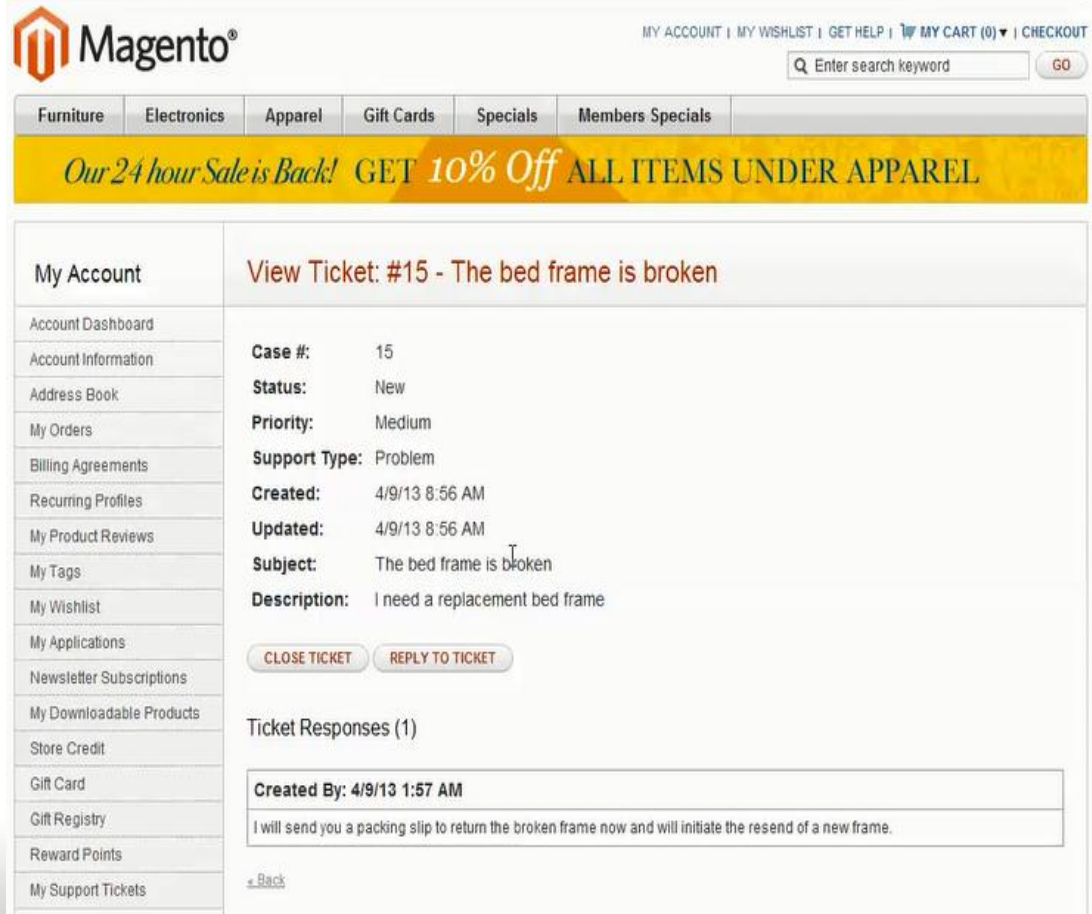
Working on Cases

- For the Customer Service Agent, you don't have to leave Salesforce
 - Account data is present
 - Order history is complete and up to date
 - All Cases are worked in Salesforce

Case Detail		<a>Edit <a>Delete <a>Close Case <a>Clone	
Case Owner	Integration User [Change]	Contact Phone	
Case Number	00001078	Contact Email	
Contact Name		Case Id	20
Account Name	Jane Smith	Processed by Integration	4/10/2013 12:45 PM
Ready for Integration	<input type="checkbox"/>		
▼ Additional Information			
Status	New	Type	Problem
Case Origin	Web	Case Reason	Shipping Status
Priority	Medium		
Subject	The couch is torn		
Description	Help		
Web Email		Web Company	Jane Smith
Web Name	Jane Smith	Web Phone	
DateTime Opened	4/10/2013 12:43 PM	DateTime Closed	
▼ System Information			
Created By	Integration User , 4/10/2013 12:44 PM	DB	<input type="checkbox"/>
Last Modified By	Integration User , 4/10/2013 12:45 PM	DB Case Duration Hours	
customer id	15	DB Hours	

Measuring Progress

- As a case is being worked in Salesforce, real time updates are pushed to Magento
 - Customer notified via email



The screenshot displays the Magento customer support interface. At the top, the Magento logo is on the left, and navigation links for 'MY ACCOUNT', 'MY WISHLIST', 'GET HELP', 'MY CART (0)', and 'CHECKOUT' are on the right. A search bar is also present. Below the navigation is a yellow promotional banner: 'Our 24 hour Sale is Back! GET 10% Off ALL ITEMS UNDER APPAREL'. The main content area is divided into two columns. The left column, titled 'My Account', contains a list of links: Account Dashboard, Account Information, Address Book, My Orders, Billing Agreements, Recurring Profiles, My Product Reviews, My Tags, My Wishlist, My Applications, Newsletter Subscriptions, My Downloadable Products, Store Credit, Gift Card, Gift Registry, Reward Points, and My Support Tickets. The right column, titled 'View Ticket: #15 - The bed frame is broken', displays the following details: Case #: 15, Status: New, Priority: Medium, Support Type: Problem, Created: 4/9/13 8:56 AM, Updated: 4/9/13 8:56 AM, Subject: The bed frame is broken, and Description: I need a replacement bed frame. Below the details are two buttons: 'CLOSE TICKET' and 'REPLY TO TICKET'. Underneath, it says 'Ticket Responses (1)' and shows a response: 'Created By: 4/9/13 1:57 AM' with the text 'I will send you a packing slip to return the broken frame now and will initiate the resend of a new frame.' A 'Back' link is at the bottom.

Wrap Up

- Manage Support requests from all channels in one place
- Consolidate Order History
- Provide a 360 degree view of the customer
- The package is upgrade safe and can be installed in as little as a day



Questions

- ?



Additional Resources

- To learn more about this solution or request a live demonstration or pricing, visit our site at <http://levementum.com/products/magento-salesforce-plugin>
- You'll also find additional related content such as:
 - Solution summaries
 - Packaged offerings
 - White papers
 - More
- You can contact us at 480-320-2500 or sales@levementum.com at anytime to discuss your site(s) and needs or to see a live demonstration or to receive a copy of this presentation
- Be sure to visit our blog at <http://www.levementum.com/blog>

