



## Optimizing Salesforce Knowledge Base for Better Content Discoverability

### THE CUSTOMER

The customer is a Dutch multinational company that deals in manufacturing of architectural products and window coverings for commercial and residential consumers. They are innovating high-performance architectural materials with proprietary characteristics in design, comfort, and sustainability.

### THE CONTEXT

The customer was using Salesforce Knowledge as a knowledge base for its internal and external users. Their knowledge base set-up was uncategorized, had article visibility constraints to relevant users, and they had to create duplicate articles for internal and external users. All of these challenges combined were getting in the way of the superior end-user experience that the customer was looking to provide.

### THE OBJECTIVE

The customer wanted to revamp and optimize their knowledge base setup. They wanted their Knowledge Management Analyst (KMA) to spend less time in duplicating articles from their Help Site to make them visible to Dealers. Also, they wanted their KMA to be able to update the visibility of articles instead of manually creating a duplicate article. They were looking to fix broken article links after moving them from Salesforce Classic to Salesforce Lightning.



Set up visibility matrix for internal & external users



Eliminated manual effort in creating articles for different users



Fixed broken links on Salesforce Lightning



Improved content visibility and enabled a user-friendly search experience

## THE SOLUTION



To understand the knowledge base setup, we conducted an in-depth assessment for identifying pain areas.



To ensure a better search experience for internal & external users and to improve article indexing across various data sources, we integrated SearchUnify (our Cognitive Search and Insights Engine) with their knowledge base.



To set the foundation right for revamping the knowledge base, we created:

- Documentation of its 'ideal versus current state' of their knowledge base
- Roadmap for future growth and success as per Salesforce best practices



To fix broken article links in Salesforce Lightning, we created and used persistent links to append the URL name of the specific article at the end of the hard-coded URL.



To avoid article duplicity and to control the visibility of the articles better, we:

- Introduced data categories, record types, channels, and page layouts
- Added page layouts for different channels and defined specific sections in each page layout
- Created an option to control article title for internal users and dealers through the page layout
- Added a custom field that was visible to internal users only
- Added data categories corresponding to the products
- Defined data category for region-based articles visibility using the custom field
- Assigned record type to the related profile

## THE OUTCOME

With Grazitti's help, the customer was able to modernize their knowledge base and their users could witness better content discoverability. With a visibility matrix now set up, they could control the visibility of the articles for internal and external users better. Now, their KMA doesn't have to invest any effort in creating duplicate articles. Also, there is a structured assignment of Data Categories in articles, they could manage their knowledge base with efficiency. With SearchUnify integrated into their knowledge base, they could additionally offer their users relevant search results.

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### SCAN CODE

