

COVEO FOR SALESFORCE
FREE EDITION

Best Practices for Adding AI-Powered Search to Your Salesforce Community or App

Best Practices: Leveraging Coveo for Salesforce Free Edition on Your Community or Custom App

COVEO FOR SALESFORCE FREE EDITION: YOUR ONRAMP TO AI-POWERED SELF-SERVICE EXPERIENCES

Adding AI-powered search on your Salesforce Community or App drives real business results, such as:



Improving customer engagement through better and easier access to content



Boosting case deflection by helping customers find answers on their own

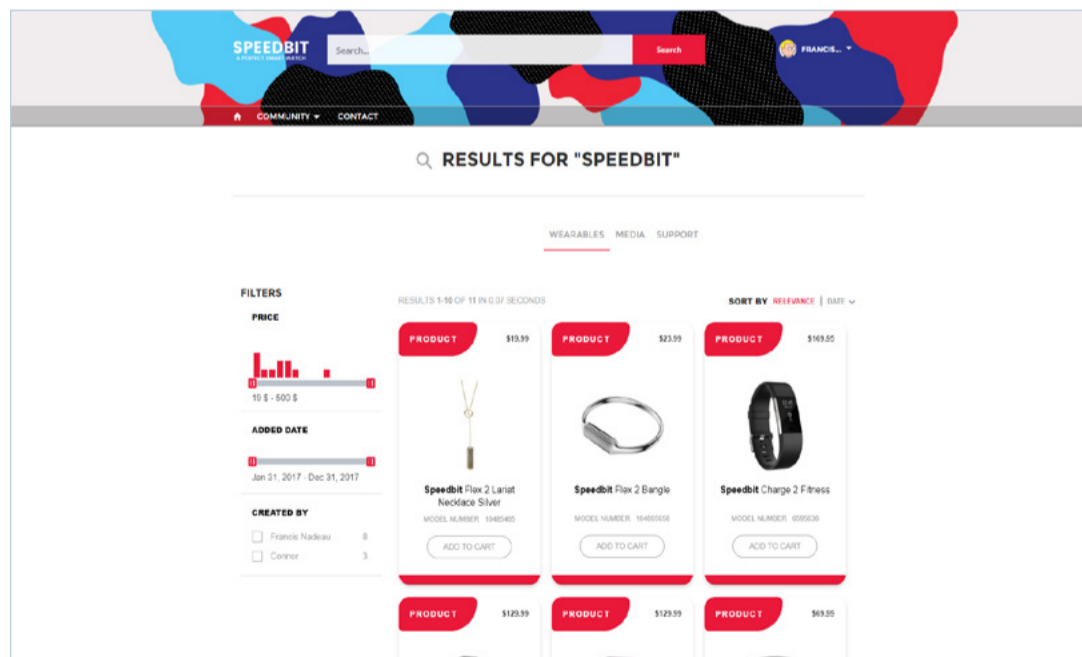


Increasing customer satisfaction through more effortless, personalized experiences

WHAT'S INCLUDED IN THE FREE EDITION?

Coveo for Salesforce Free Edition gives you the capabilities to create more intelligent, intuitive and personalized search experiences - with no usage limit. Here's what you're getting, absolutely free:

- ▶ A unified result list across all of your Salesforce content
- ▶ A rich search UI with facets and customizable results templates
- ▶ Machine learning to deliver the best, most relevant answers
- ▶ Powerful search usage analytics



See for yourself the type of search experience can be built with the Free Edition

CREATING AN INTELLIGENT SALESFORCE COMMUNITY

The secret to a great community lies in offering an intelligent search experience. The search capabilities of your Salesforce Community fuels the self-service experiences you deliver and directly impacts customer success and case deflection. Enhancing the out-of-the-box search capabilities of Salesforce with AI-powered search enables your customers to receive the best, most relevant answers to them, every time.

> [Get Started with the Free Edition](#)



Search powers your entire customer journey. With each interaction, customers, partners, and employees are telling you what they're looking for, what their pain points are, and how they're going about finding a solution. Coveo's machine learning and analytics allow you to capture and learn from customer interactions to deliver:

1. MORE PERSONALIZED EXPERIENCES
2. CONTEXTUALLY RELEVANT CONTENT SUGGESTIONS
3. EASY AND INTUITIVE NAVIGATION

UPON INSTALLING THE COVEO FOR SALESFORCE FREE EDITION ON YOUR SALESFORCE COMMUNITY OR APP, APPLY THE FOLLOWING SEARCH BEST PRACTICES TO MAKE THE MOST OUT OF THE SOLUTION, AND MAXIMIZE SELF-SERVICE SUCCESS.



BEST PRACTICE # 1 - MAKE THE SEARCH BAR PROMINENT

Show your customers you value their time by eliminating the need to navigate your site to get to the content they want. Make the search bar prominent on your Community's home page so they know they can rely on that avenue to find what they need.

> [Get instructions on how to replace the main search box on your Salesforce Lightning Community](#)



BEST PRACTICE # 2 - ALLOW USERS TO EASILY FILTER SEARCH RESULTS

Filtered search results will allow users to quickly find what is most relevant to them. Include facets on your search page to help visitors quickly drill down on their search results and should vary based on the query and results themselves.

> [Learn how to create a full search page with facets on your Lightning Community](#)



BEST PRACTICE # 3 - CREATE VISUALLY COMPELLING SEARCH RESULTS

Your content should be presented in a way that encourages your customers to view it. A rich, visually appealing search experience with multimedia thumbnails and result previews will increase engagement and meet the expectations that your customers build from interactions with their day-to-day apps.

> [Learn how to customize your result templates](#)

**BEST PRACTICE # 4 - CONTINUALLY IMPROVE THE SEARCH EXPERIENCE BASED ON BEHAVIOR**

Have a complete line of sight into your users' search journeys to help users where they struggle to find answers. Identify and address content gaps and understand user behavior and patterns using search usage analytics.

> [Learn how to make the most out of your Coveo usage analytics](#)

**BEST PRACTICE # 5 - LET MACHINE LEARNING WORK ITS MAGIC**

The great thing with machine learning, is that it works by itself to make your search experiences smarter and more relevant overtime. It enables you to automatically adjust results to trends and patterns, at scale and for different user profiles.

> [Learn how it works and how you can configure the Coveo machine learning features](#)

READY TO TAKE YOUR SEARCH EXPERIENCES TO THE NEXT LEVEL? WHEN YOU'RE READY TO TAKE THE NEXT STEP IN YOUR AI-POWERED SEARCH JOURNEY, YOU CAN EXPAND INTO MORE ADVANCED CAPABILITIES WITH OUR PRO EDITION.

**DELIVER UNIFIED SEARCH RESULTS**

Make all your self-service content searchable and accessible directly from your Community. The Pro Edition allows you to connect to external cloud-based sources such as YouTube, DropBox, Sharepoint Online, Google Drive, and more.

> [Learn about the Cloud Connectors available in the Pro Edition](#)

**DELIVER PROACTIVE CONTENT RECOMMENDATIONS**

Use machine learning to leverage customer insights and proactively suggest content, training, or resources they might be interested in. Recommending the right offers helps drive revenue and fuels community engagement.

> [Learn about the Coveo content recommendations models](#)

**INJECT INTELLIGENT SEARCH INTO YOUR CASE CREATION PAGE**

Case deflection occurs when a customer that would have created a case, finds their answer, and no longer needs to contact your support team. Proactively suggest content on your case creation page, from all content sources, to significantly boost case deflection rates.

> [Learn how to create a case deflection page powered by Coveo intelligent search](#)

How can Coveo help you?

Integrate the power of Coveo in your self-service efforts today.
To learn more about Coveo for Salesforce or to try the Free Edition

[VISIT COVEO.COM/SALESFORCEFREE](https://www.coveo.com/salesforcefree)