

Charket

Salesforce
+
WeChat
▽
Charket

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more about Chatket



Charket Features

Charket is a Salesforce native app that helps businesses implement their WeChat strategies covering WeChat marketing, social selling/commerce, WeChat customer service, WeChat payment processing and more within days. Charket connects WeChat business accounts and mini programs into Salesforce without having any servers in between.

Charket guarantees the best performance, the highest availability and full scalability to support ever-changing business requirements. Most importantly, all data is fully secured by Salesforce thanks to the nature of this direct integration.



Support Salesforce Sales Cloud, Service Cloud, Marketing Cloud and Pardot.



Enable WeChat marketing automation through Salesforce Marketing Cloud, Pardot or Sales Cloud.



Manage marketing campaigns. Support sending marketing event invitations, accepting event registration through WeChat, delivering event reminders, onsite check-in, interacting with event attendees, and collecting their feedback through surveys.



Connect WeChat followers with Salesforce leads, contacts or person accounts.



Capture and save WeChat user profiles, user activities and user interactions with WeChat agents into Salesforce.



Conduct lead qualification/segmentation, close deals and support WeChat customers using Live Chat from both computers and mobile devices.



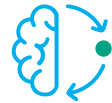
Reduce learning effort by offering out-of-the-box support for Lightning Console and Omni-Channel if service agents are already using them for supporting customers from other channels.



Monitor agent performance and transfer WeChat customers among agents with Live Chat Monitor.



Segment WeChat followers through WeChat tags and Salesforce marketing campaigns.



Open KB (knowledge base) articles and customer service resources to WeChat customers through Smart Replies.



Add WeChat payment method to the checkout process. Request WeChat payments and issue refunds from within Salesforce.



Build and customize forms and surveys using Charket Form/Survey Builders.



Use the Charket chatbot and Charket skills to enable customer support automation.



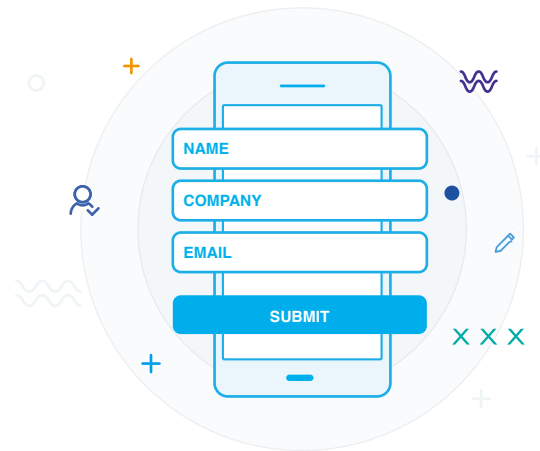
Extend Charket functionalities through Process Builder and Apex code.



Charket Marketing Event Management

Event Registration

Generate multiple event registration QR codes and their forms for different channels and segment event participants using tags and statuses.



Even Notifications

Schedule and deliver event reminders to event participants.



Event Check-in

Allow event participants to check in an event and get their name badges printed automatically by scanning a QR code. Generate multiple check-in QR codes to support large scale events.

Event Interactions

Increase event interactivity through live chat support, resource sharing and lucky draws.



Event Data Update & Analytics









- Real-time campaign member status updates.
- Event data reporting using Salesforce reporting tools.



Charket

Social Selling

Charket combines social which is WeChat and selling which is Salesforce CRM into a single mobile app to offer its social selling solution. Charket social selling solution is ideal for B2B sales and B2C sales with a high ARPU (average revenue per user). It covers the whole sales cycle from lead generation/qualification/segmentation/conversion to opportunity and sales activity management. By using Charket, sales people can:

-  Capture sales leads generated from WeChat QR codes.
-  Qualify them through having chat conversations with them.
-  Share with them resources, such as brochures and videos.
-  Convert qualified leads to accounts, contacts and opportunities.
-  Manage sales pipeline and record sales activities and follow-ups.
-  Collaborate with internal teams using Chatter.
-  Follow up with WeChat prospects to get deals closed.
-  Run Salesforce reports and dashboards to gain in-depth view of data.

The social selling Charket enables went beyond being just a technical solution. It was developed as a sales methodology that not only adapts to sales practices in China but also improves sales efficiency by well utilizing sales people's time through patented mobile technologies. Here are benefits from using the Charket social selling solution:

- Over the past decade or so, China has developed the most advanced mobile technologies. Computers are playing a way much less important role for getting things done. Many people don't even have computers. People got used to do as much as possible using their mobile devices. The Charket mobile app allows sales people to manage their sales data and stay engaged with WeChat prospects anytime anywhere.
- Business travels are expensive. Travel expenses always represent a high percentage of the overall sales expenses. Charket social selling methodology does not advocate meeting prospects in person frequently and can still make them feel that support and information are always seconds away on WeChat. Reducing travels also means increasing sales people's available time, which can well be translated to higher capacity of the sales team.
- Charket social selling methodology adopts the "do it, log it and forget it" rule to further increase each sales person's capacity. "do it" refers to conducting any sales activity, such as a sales call, a demo, etc. "log it" means each sales activity done and its follow-up action(s) must be recorded with as much detail as possible. "forget it" is why such rule can increase each sales person's capacity. After having all details recorded, sales people have no need to remember what they have done so they can feel free to move on to the next deal and work with a high amount of prospects closely. Through reduced travels and by adopting this rule, each sales person can easily engage with 100+ prospects at any time.
- This "do it, log it and forget it" rule will also help produce enough data to develop best practices, sales disciplines and eventually a company's own sales methodology that contributes to the growth of the company's profit margin.



Contact us by scanning this QR code to learn how we can help you implement your social selling strategy.



Charket Contact Center Solution



Live Chat

Chat with WeChat customers in real time and share with them resources such as KB articles, videos, etc.



Routing Rules

Route new chat requests to the right agents based on data in Salesforce, such as customer SLA and agent skill set.



WeChat Reminders

Deliver automated notifications when progress is made to cases.



Quick Replies

Use Quick Replies to answer frequently asked questions from WeChat customers.



WeChat Tags

View WeChat user segmentation and tag them while chatting with them.



Request Payments

Send payment requests through the Live Chat window.



Smart Replies

Reduce agent workload by sharing with WeChat customers resources using Smart Replies before connecting them with agents.



Chatbot

Further reduce agent workload by using Charket chatbot to process more complex WeChat customer inquiries.



Agent Status

Customize agent statuses and their auto replies to let WeChat customers know why their assigned agents are not responding and when they will be available.



Chat Transfer

Transfer WeChat customers to other agents and internal resources whenever needed.



Charket Mobile App

Allow agents to support WeChat customers anytime anywhere.



Live Chat Monitor

Allow supervisors to monitor chat conversations, view chat analytics, and transfer WeChat customers among agents.



Quick Survey

Allow WeChat customers to submit a quick Yes or No survey after a chat conversation ends to rate their customer support experience.



Case Creation

Record cases either manually by agents/customers or automatically using Salesforce Process Builder.



Lightning Console Support

Support WeChat customers from Salesforce Lightning Console and view their 360 data with minimum clicks.



Omni-Channel Support

Add Charket Live Chat to Salesforce Omni-Channel to use one chat window to support customers from all channels.






Field Service Case Study

1. Client Background


The client is a global medical equipment company that develops and manufactures surgical devices and related pharmaceutical products.


2. Challenges


ServiceMax, an application built with and running on top of the Salesforce Lightning platform, is used by this global company to manage on-site repairs and maintenance of their equipments. Customers of the company had previously made service appointments by calling the company's contact center where service agents created cases and assigned them to service engineers according to the customer and equipment data maintained in ServiceMax. This process introduced the following issues and challenges:

-  Customers had to wait for long time when the contact center was busy. The customer satisfaction was compromised.
-  There were often times a gap between what a customer described over the phone and what the issue really was happened due to limitation with telephone communication. Such gap delayed the issue resolution process and could potentially upset customers.
-  The communication between customers and service engineers suffered from the same telephone communication limitation that service engineers could not obtain the most accurate information before going onsite.
-  Going from one customer to another did not leave service engineers much time to open their computers and update case status. Customers did not receive timely status update, had hard time reaching out to service engineers, and could not submit their feedback regarding their experience with services received.
-  The contact center operating cost for equipments, telephone services, rent and salaries was getting higher.

The client started looking for a new solution that can improve the satisfaction of their customers in China and at the same time, bring the operating cost on customer support down. The new solution needed to meet the following requirements.

-  Customers can submit their service requests at any time by scanning equipment QR codes with WeChat and if needed, upload pictures and video clips through WeChat as well.
-  QR codes have customer and equipment data maintained in ServiceMax.
-  Cases are saved directly to Salesforce and assigned to service engineers automatically based on ServiceMax data.
-  Cases, if not attended by service engineers within the timeframe defined in SLA, need to be escalated and reassigned.
-  Customers can communicate directly with service engineers through WeChat.
-  Customers can use WeChat to provide their feedback on customer service experience by submitting surveys.

 Service engineers and service agents can update case status from their mobile devices and real-time updates are pushed to customers' WeChat.

 Management teams can run Salesforce reports and dashboards to monitor case processing status and engineer resource utilization.

3. Solution

As a one-stop WeChat solution, Charket's service offering meets all their customer support requirements. By connecting their WeChat into their Salesforce and leveraging data available from ServiceMax, Charket helped the client implement a highly automated customer support process that covers case creation using WeChat, case auto assignment, WeChat based communication and resource sharing, and feedback collection through WeChat.



WeChat Customers

Log cases by scanning QR codes and stay informed of status updates through WeChat. Simplified process enhances customer experience.



Service Engineers


View customer data and process cases using the Charket mobile app. Use Live Chat to receive pictures & audio/video clips from customers and share with them solution articles and how-to videos. Advanced mobile technologies help troubleshoot issues.




Service Manager

Gains insight into case processing, engineer performance and customer satisfaction through real-time data reporting. Increased efficiency cuts costs.

4. Charket Competitive Advantages

 **Data Analytics**
All data generated throughout the entire service process is stored in Salesforce. Salesforce reporting tools and 3rd party data mining tools, such as Tableau, offer the flexibility to report against and analyze such data.

 **Data Security**
Charket connects WeChat right into Salesforce without having any servers in between to ensure the highest level of data security, the best performance and the most reliable connectivity.

 **Cost Savings**
Charket is committed to reducing business costs and increasing user experience by automating business processes and redistributing workload.

 **Customer Success Support**
Charket's customer success team offers on-going support and technical expertise to help each customer succeed.



Charket Chatbot



What is the Charket chatbot?

The Charket Chatbot allows a WeChat user who can be a customer, a partner or an internal employee to chat with Salesforce from their WeChat app. Things that can be done through a chat conversations include logging a case, checking order status, recording sales activities, etc.

How does the Charket chatbot works?

The Charket chatbot works the same way as most other personal assistant devices do, such as Amazon Echo which relies on skills developers build and publish to the Amazon Alexa platform. So in order for the Charket chatbot to perform tasks, developers and admins will need to build Charket skills and add the skills to Charket. The Charket skills are what the Charket chatbot uses to process WeChat user requests.

What can the Charket chatbot do?

What the Charket chatbot can do depends on what skills a company has built and made available to the chatbot.

Does the Charket chatbot have limits?

There is no limitation on what the Charket chatbot can do as long as the resources the chatbot consumes are within the Salesforce Apex Governor Limits which Salesforce imposes to each org due to the nature of Salesforce being a multi-tenant platform. For example, a large high definition photo may fail to be processed because it exceeds the size of a file that the Apex code can process. Some of the limits can be avoided by purchasing additional resources from Salesforce.

Are Charket skills difficult to develop?

No. Our product team did a great job making building Charket skills easy enough. Most skills can be built through the drag-and-drop approach. More complex skills require coding work. We have a library of Charket skills and their source code that Salesforce developers can refer to in order to build their own skills.

How is a Charket skill triggered?

A Charket skill can be triggered by WeChat users through keyword matching, menu click and QR code scanning, by WeChat agents from the Live Chat window, and by Process Builder processes.

Does Charket come with built-in skills?

Charket does not have any built-in skills after it's installed in a Salesforce org because skills are usually business specific. A skill that works for one business may not work for another. A Charket customer will need to build their own skills before using the Charket chatbot.

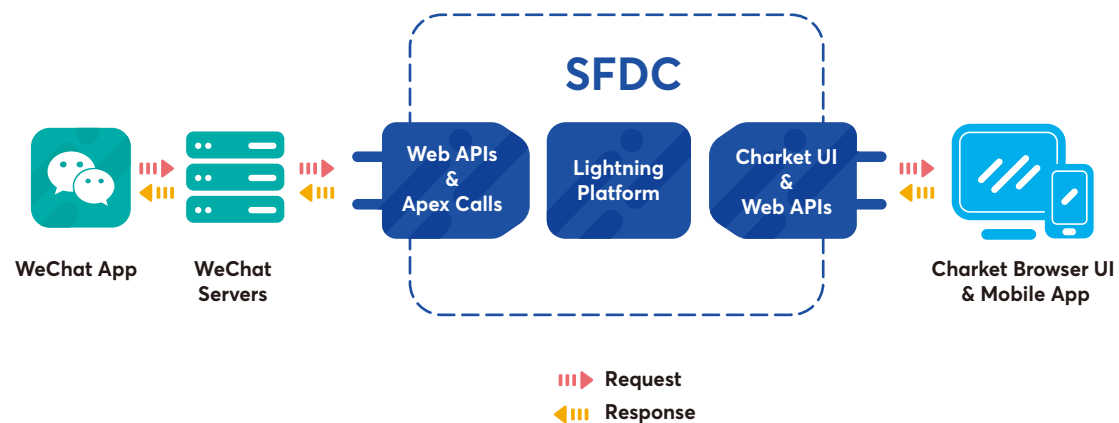
Are Charket skills shared among all Charket customers?

No. Unlike Amazon Alexa skills which are available to all Echo devices, Charket skills work within the scope of each Salesforce org where the skills are hosted.

+ Charket Data Security

Data security is what we cared the most when we were designing our Charket app. Charket protects a customer's data by not storing any data outside the customer's own Salesforce org.

Charket is a Salesforce native app that connects WeChat into Salesforce directly, without having any servers in between. Charket is the most secure WeChat solution on the market.



Here are more details on how data is secured between any two points

- When a WeChat user initiates a request such as a message, a menu click, etc., the request first goes from the user's WeChat app to WeChat servers. The request in this case is encrypted by WeChat. This means even if a WeChat user's Internet connection is compromised, there is no way the data can be compromised.

Below is a quote from WeChat's help center on how WeChat secures sent/received messages.

WeChat securely encrypts your sent and received messages between our servers and your device ensuring that third parties cannot snoop on your messages as they are being delivered over the

+ Data Encrypted

internet. We do not permanently retain the content of any messages on our servers whether they are text, audio or rich media files such as photos, Sights or documents. Once all intended recipients have received your message, WeChat deletes the content of the message on our servers and therefore third parties including WeChat itself are unable to view the content of your message. To ensure the privacy of your messages, it's important to make sure that you follow some safety tips. Read more about how to best secure your WeChat experience on all of your devices.

In some cases, you may choose to have your message content either saved to the server or handled by a third-party service partner. For instance, when you select to add a message to Favorites, your message content will be automatically saved to our servers so that the message is available from within Favorites on any device that you log in to via WeChat. You may at any time de-select any message content from Favorites and they will be deleted from our servers. When you long-press a message and select Translate, the message may be translated via a third-party translation service, but the third-party shall not store the content of the message.

- After receiving the request, WeChat servers forward the request to Salesforce. The request, while being transmitted to Salesforce, is encrypted using a TLS 1.2 or above certificate. The request is secure not just because it's encrypted but also it's transmitted between two data centers. It's very hard, if not impossible, to intercept such communication.
- Salesforce stores data from the request and then forwards the request to an agent's browser or Charket mobile app. The request in this case is encrypted by Salesforce's TLS certificate. Salesforce is well known for its data security record.
- When the agent's response goes back to the WeChat user, it goes through the same route but in the opposite direction. The returned response is secured the same way as how the received request is secured.

Salesforce disabled TLS 1.1 in October 2019. All data inbound to and outbound from Salesforce is encrypted using TLS 1.2 or above certificates which are considered safe and strong today and will take infinite resources to compromise.

Want to know more about Charket Data Security? Follow Charket by scanning this QR code and chat with our technical experts.



Charket Competence

- 1 Performance:** Charket is a direct integration between Salesforce and WeChat without having any servers in between. It reduces factors, such as server bottleneck, extra connection routings and additional request processing, that can slow down the traffic. A request or a response between a WeChat user and an agent will only take 1 second on average to reach each other. No other solutions can achieve such level of performance, not even close.
- 2 Flexibility & Scalability:** Salesforce's award winning Lightning platform is well known for its flexibility and scalability. Salesforce customers can use this platform to create its own data schema, build workflow rules & PB processes, and develop Apex code to implement customized solutions. Charket is a Salesforce native app that runs on top of the Lightning platform. Charket inherits the platform's flexibility and scalability that Charket customers can rely on to meet their unique WeChat requirements.
- 3 Data Security:** Needless to say how things can turn very bad when data breach happens. Charket is the only WeChat solution provider that does NOT have access

to customers' WeChat data. All WeChat data is saved in each customer's own Salesforce org so the data is fully secured by Salesforce's multi layers of authentication and data storage/access technologies. Having the confidence that Charket can truly protect their data is a major reason why most international brands chose Charket. Data security is their bottom line when choosing any business systems.

- 4 GDPR Compliance:** GDPR is applicable to companies all around the world if they collect personal information from people who live in European countries and there are for sure many WeChat users in those countries. By using Charket, companies can implement their WeChat strategies with the least amount of effort in order to get compliant with GDPR. Charket is so far the only WeChat solution that can offer GDPR compliance.
- 5 Support of Salesforce Clouds:** Charket supports all Salesforce major clouds, from Sales Cloud and Service Cloud to Marketing Cloud and Pardot.

Charket is a one-stop solution to support WeChat marketing, social selling & social commerce, WeChat customer service, WeChat payment processing and many more.

- 6 WeChat Data Analytics:** WeChat data is saved along with other Salesforce data. Salesforce's reporting & data analytics tools and even 3rd-party data reporting & mining tools can be used to help analyze WeChat data and potentially monetize the data.
- 7 Maintenance & Support:** Charket runs within Salesforce in which all other functionalities are implemented. A company's current Salesforce admin team can support Charket with very minimum extra maintenance & support effort.
- 8 Technical Expertise:** Charket is designed and developed by a product team that has 15+ years of Salesforce development experience and 6+ years of WeChat development experience. Our technical expertise in both Salesforce and WeChat guarantees Charket runs efficiently and reliably.

- 9 Cost:** Considered from the following 4 perspectives, the general ownership cost of using Charket is low and predictable.
 - Unlike most other WeChat solution providers which charge customers based on the amount of WeChat followers and servers deployed, both of which are unpredictable and can be very large, Charket charges customers based on licenses for internal users who need to engage with WeChat followers and view WeChat data. The amount of Charket licenses needed is always predictable and usually small.
 - The same team that supports Salesforce can support Charket, so there is usually no extra support and administration cost.
 - Due to the flexibility and scalability offered by Charket, the cost of building new features is low and manageable.
 - Charket offers free upgrades through Salesforce's AppExchange platform. There is no hardware upgrade/replacement cost.





Charket Customer Reviews



Charket as a first choice for WeChat integration with Salesforce

We have been using Charket for more than 6 months. I have tested all available Salesforce integrations with WeChat before deciding to go with Charket for the following reasons:

1. Best design both internally and externally.
2. Live Chat feature and analytics reports are state of the art.
3. Easy customisations through Process Builder.
4. Most importantly, fast response from the team for enquiries and support.



Charket帮助实现更好的线上线下市场活动

通过使用Charket，我们可以更加有效的管理线下的市场活动增加抽奖等互动环节；更重要的是所有的线下互动的数据，客户的信息都存储在SFDC中，可以方便的根据客户信息、线下活动的记录来分组进行线上的市场活动以及信息沟通。Charket解决了之前微信公众号粉丝无法和SFDC连接，也解决了打标签的困难。同时在易用性方面Charket也做的很好，使用起来方便顺手。作为对Charket的期待，我们希望Charket可以在模板配置，会议互动上做的更加的灵活，更加的新颖，真正的做到对线上线下活动管理的巨大提升。



Your ideal WeChat solution for Marketing Automation!

As a marketer at GE Healthcare China, we have been searching a solution that completes our customer engagement process with the integration of WeChat. Charket has proven to be the one that solves our biggest pain point. It not only allows us to interact with customers through WeChat, but also validate, track, and convert leads to contact/opportunity within our own Salesforce instance. Most importantly, all data is secured and stored in our own server, which makes it very easy to install and integrate. The Charket team's service support is also highly efficient and professional.



Charket Support rocks

we have been using this app for over a year now. It has been a game changer for us and loved from our call centre agents. Also, I want to make a special note that if you were to decide to purchase this product, you will not only be getting a best in class APP but also you will get a unmatched support from Aaron. He has been there for us at any time of the day whenever we have had a query or a need. The customer service rocks here! Thank you Charket team you are fantastic!



Charket

我们使用Charket已经半年之久，感觉使用起来非常方便，从潜在客户收集，到成为最终客户的跟踪过程，会得到全部的掌握，而且Charket升级周期也很及时，最新升级的2.0版本，增加了更多的业务模块，目前也支持中文版本，更方便企业内部的广泛使用。



Completely Changes How We Approach WeChat

Charket is the only solution I could find that brings WeChat into the world of enterprise CRM by effectively bringing lead data into the world's leading CRM solution (Salesforce). Without a centralization of leads into a single system, large inside salesforces using WeChat for lead generation are left manually managing hundreds of contacts and WeChat groups - an inefficient and disorganized process. Beyond just capturing leads in an organized way, Charket has an additional key benefit: it allows us to track the ROI of our QR-code based marketing campaigns. Before Charket, we would send QR codes out into the world and roughly guess how much impact they had. Now we can explicitly measure the number of scans for each code, and measure how many of the leads generated from those scans end up becoming real sales opportunities.

Read more reviews from
Charket customers
at AppExchange by
scanning this QR code

