

Service Cloud Administration

Duration

2 days

Delivery Format

Classroom or virtual classroom

Audience

Experienced Salesforce administrators

Service Cloud Administration is a must for experienced administrators who need to configure and maintain the Service Cloud for their organizations. Using real-world scenarios, this course will teach administrators how to configure Salesforce Knowledge, set up service contracts with milestones and entitlements, create the Console for Service application, configure the SoftPhone using Open CTI, and set up Live Agent. This course will also teach administrators how to configure a Customer Community.

Who should take this course?

Service Cloud Administration is designed for:

- Administrators with at least six months experience using Salesforce and/or administrators who have completed the Administration Essentials for New Administrators course

What you will learn

When you complete this course, you'll be able to:

- Setup the case management process automating the support process with queues, assignment/escalation rules, and workflow
- Configure Salesforce knowledge to help you manage the creation, publication, and maintenance of knowledge articles
- Enable entitlements to set up service contracts with milestones
- Setup the Salesforce Console for Service and to help your support reps work more efficiently
- Understand the capabilities of CTI interface in the Console
- Configure online chat with customers using Live Agent
- Understand and set up Communities

Modules & Topics

Case Management, Automation, and Entitlements

- Create a support process to meet business requirements
- Extend Salesforce automation to the service and support environment with web-to-case, workflow from case comments, case queues, assignment rules, and escalation rules
- Understand Entitlement Management

Salesforce Knowledge

- Understand the key concepts of Salesforce Knowledge
- Complete the features required to deploy Knowledge using article types, data categories and case integration
- Understand Knowledge Centered Support
- Define use cases for article type workflow and approval processes

Multi-Channel Support in the Console for Service

- Understand the functionality of the Salesforce Console for Service
- Assign Service Cloud User licenses to users
- Create a Service Console app
- Understand and enable Live Agent in the Console
- Understand the basics of CTI
- Enable and add the Salesforce Open CTI Demo to the Console

Salesforce Self-Service Communities

- Understand the use cases, goals, and setup of Communities
- Enable Communities in a Salesforce organization
- Create and customize a Community
- Create a community dashboard
- Understand and set up Reputation