Salesforce Support Team (with Admin + Support + Flow Deep Dive) 60 hours

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1. Introduction to Salesforce Support

1.1 What is Salesforce Support
1.2 Day-to-Day Responsibilities of Support Agents
1.3 Overview of Salesforce Cloud
1.4 Understanding Org Setup: Users, Apps, Permissions

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2. Salesforce Navigation for Support Users

2.1 App Launcher / Tabs
2.2 List Views
2.3 Lightning Console for Service
2.4 Global Search Tips

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3. Salesforce Data Model for Support

3.1 Standard Objects Overview
3.2 Lookup vs Master-Detail
3.3 Case Field-Level Overview

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4. Case Management – Core of Support

4.1 What is a Case?
4.2 Case Lifecycle
4.3 Status Management
4.4 Email-to-Case
4.5 Web-to-Case
4.6 Auto-Response Rules
4.7 **Case Assignment Rules**
4.8 Escalation Rules
4.9 Entitlements (Optional)
4.10 Case Teams

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5. Support Settings

5.1 Support Process
5.2 Case Feed

5.3 Email Templates
5.4 Default Case Owner
5.5 Business Hours
5.6 Holidays
5.7 Omni-Channel (Basic Overview)

6. User Management for Support

6.1 User Creation
6.2 Profiles
6.3 Permission Sets
6.4 Role Hierarchy
6.5 Login Troubleshooting

7. Queue Management

7.1 Queues Overview
7.2 Queue Members
7.3 Queue Assignment
7.4 Monitoring Queues

8. Record Types & Page Layouts

8.1 Why Use Record Types
8.2 Support Process
8.3 Case Page Layouts
8.4 Troubleshooting Visibility

9. Automation for Support

9.1 Workflow Rules (Legacy)

9.2 Process Builder (Legacy)

9.3 Flows Deep Dive (Expanded Section)

A. Introduction to Flows

B. Record-Triggered Flows

C. Screen Flows

D. Scheduled Flows

E. Autolaunched Flows

F. Flow Best Practices

G. Flow Error Handling

H. Support-Specific Flow Use Cases

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10. BASIC SALESFORCE ADMIN TOPICS (Newly Added Section)

10.1 Validation Rules

- Creating validation rules

- Common support-focused validations

- Real-time support scenarios

10.2 Formula Fields

- Basic formulas

- Text formulas for case details

- Use cases for support

10.3 Assignment Rules (General)

- Leads (basic overview)

- Cases (in depth)

10.4 Approval Processes

- When approvals are needed

- Example: Escalation requiring manager approval

10.5 Custom Fields & Object Basics

- Creating custom fields

- Field types

- Best practices

10.6 Permission Model Basics

- OWD

- Sharing Rules

- Manual Sharing

10.7 App & Tab Management

- Creating custom apps

- Assigning to profiles

- Configuring tabs for support team

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11. Reports & Dashboards for Support

11.1 Report Types
11.2 Filters, Groups
11.3 Case Aging Report
11.4 Backlog Dashboard
11.5 Scheduling Reports

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12. Data Loading for Support

12.1 Import Wizard
12.2 Data Loader
12.3 De-duplication Basics

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13. Real Support Scenarios & Hands-On

13.1 Email-to-Case Troubleshooting
13.2 Case Not Assigned to Queue
13.3 Missing Case Comments
13.4 Incorrect Case Owner
13.5 Report Mismatch
13.6 Flow Error Troubleshooting
13.7 Permission Errors

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14. Final Assessment + Q&A

14.1 Practical Tasks
14.2 Case Troubleshooting Test
14.3 Flow Debug Exercise