

Administer and Maintain Service Cloud ADX261



Job Role:
Administrator



Duration:
2 Days



Learn how to scale your organization's support needs and streamline business processes across your service teams with Service Cloud. This 2-day instructor-led course will teach you how to implement support case management, configure the Lightning Service Console application, enable Salesforce Lightning Knowledge, use Flow for Service, and generate service reports to measure support agent performance. Create outstanding customer service experiences that boost customer satisfaction scores, optimize support agent productivity, and improve operational efficiency.

Overview

Who should take this course?

This course is intended for Salesforce Administrators in charge of configuring, managing, and maintaining Service Cloud. Students should have the Salesforce Administrator credential or equivalent knowledge. They should also demonstrate a solid understanding of basic Salesforce features and functionality and have at least six months of experience using Salesforce. Additionally, this course is a fantastic starting point for anyone looking to earn their Service Cloud Consultant credential.

When you complete this course, you will be able to:

- ✓ Customize the Salesforce Lightning Service Console application in order to optimize support agent productivity.
- ✓ Implement support case management and automate support processes with queues, assignment rules, and escalation rules.
- ✓ Enable Salesforce Lightning Knowledge to manage the creation, publication, and maintenance of knowledge articles.

About CloudWise

We offer Authorized Salesforce training with several guaranteed-to-run classes each month. We are an industry-leading authorized Salesforce training provider and part of Layer 8 Training.

- ✓ Manage customer service-level agreements by setting up case Entitlements and Milestones.
- ✓ Identify Softphone Utility capabilities and functionality.
- ✓ Explain how Open Computer-Telephony Integration (CTI) and Service Cloud Voice work.
- ✓ Recommend and administer Flow for Service solutions to address customer business requirements.
- ✓ Build Service Cloud reports and dashboards for call center and operational support activities.

Lessons & Topics



Support Case Management

- Streamline Support Case Management Workflows
- Identify Needs for Different Support Case Types
- Customize Support Case Fields, Page Layouts, and Record Types
- Define Case Status Picklist Values
- Create Support Case Queues, Assignment Rules, and Escalation Rules
- Manage Customer Service-Level Agreements with Case Entitlements and Milestones
- Examine Support Agent Collaboration Options



Lightning Service Console

- Create Custom Objects
- Build a Service Console Application
- Customize Lightning Record Pages
- Add Productivity Tools to the Console Utility Bar
- Create Macros Using Macro Builder
- Understand Softphone Utility Functionality
- Explore Open CTI and Service Cloud Voice Telephony



Salesforce Lightning Knowledge

- Enable Lightning Knowledge
- Assign Appropriate Knowledge User Licenses
- Customize Page Layouts and Record Types
- Manage Sharing Permissions for Knowledge Tools and Processes
- Create and Manage Knowledge Articles
- Utilize Knowledge Articles to Manage and Close Cases



Flow for Service

- Examine Flow for Service Use Cases
- Explore Flow for Service Cloud
- Create a Customer Support Flow
- Escalate Open Tasks on Overdue Cases



Service Cloud Reporting

- Discover Service Cloud Reports and Dashboards
- Measure Support Agent Performance
- Explore Salesforce AppExchange Report Packages

Contact us for upcoming classes and pricing:

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