

ADMINISTER AND MAINTAIN SERVICE CLOUD (ADX261)

OVERVIEW

Leverage Service Cloud to scale your support efforts and improve customer service. In this 2-day class, Service Cloud experts will walk you through how to configure and maintain Service Cloud for your organization. Learn how to set up service contracts with milestones and entitlements, set up the Service Console application, add the Softphone Utility to your Lightning Console, and set up Web Chats to provide frictionless customer support. Learn how to configure a Customer Community so you can connect customers to knowledge articles and community members to find answers instantly.

WHO SHOULD TAKE THIS COURSE ?

This class is designed for experienced Salesforce Administrators who are responsible for setting up, configuring, and managing Service Cloud. Prior to taking this class, you should have a solid understanding of Salesforce functionality and concepts, at least 6 months of experience using Salesforce, and the Salesforce Administrator credential or equivalent knowledge.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Set up the case management process automating the support process with queues, assignment/escalation rules, and Process Builder.
- Configure Salesforce knowledge to help you manage the creation, publication, and maintenance of knowledge articles.
- Enable entitlements to set up service contracts.
- Set up the Salesforce Service Console app to help your support reps work more efficiently.
- Understand the capabilities of the Softphone Utility in the Lightning Console.
- Configure online chat with customers using Web Chats.
- Understand and set up communities.

CERTIFICATION

ADX261 is recommended to prepare Salesforce Certified Service Cloud Consultant exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#).



DURATION

2 days

DELIVERY FORMAT

- Classroom
- Virtual

LANGUAGE

Course in French /
Materials in English

USER INTERFACE

Lightning Experience

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LESSONS & TOPICS

Case Escalations and Entitlements

- Create processes to streamline a support team's workflow and case management.
- Customize fields, page layouts, and record types for different kinds of support cases.
- Define picklist values for each new record type.
- Create case assignment rules, queues, and escalation rules to push cases to the appropriate support team at the appropriate time.
- Create and manage entitlements to customize the level of support for each customer.

Salesforce Knowledge

- Enable Lightning Knowledge and assign appropriate user licenses.
- Customize page layouts and record types to support knowledge article management.
- Customize access to, permissions for, and visibility of knowledge tools and processes.
- Create and manage articles to ensure quality of information.
- Manage and close cases more efficiently using knowledge articles.

Lightning Service Console

- Create your own Service Console app.
- Customize the Lightning Console pages.
- Add Utilities to your console.
- Enable and utilize Chat (formerly Live Agent).
- Optimize the use of Omni-Channel.

Salesforce Self-Service Communities

- Enable communities in your Salesforce org.
- Create a permission set for effective administration of communities.
- Customize the look and layout of the community.
- Add the Reputation component to the community.