ADMINISTER AND MAINTAIN SERVICE CLOUD (ADX261)

OVERVIEW

Discover how to scale your organizational support needs and streamline business processes across your service teams with Service Cloud. In this 2-day instructor-led class, learn how to configure the Lightning Service Console application, implement support case management, enable Salesforce Lightning Knowledge, use Flow for Service. Create exceptional customer service experiences that drive customer satisfaction scores, optimize support agent productivity, and improve operational efficiency.

WHO SHOULD TAKE THIS COURSE?

This class is designed for Salesforce Administrators who are responsible for configuring, managing, and maintaining Service Cloud. This is also a great class 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.
- 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.

PREREQUISITES AND PREWORK

Students should hold the Salesforce Administrator credential or possess equivalent knowledge, demonstrate a solid understanding of basic Salesforce features and functionality, and have at least six months of experience using Salesforce. Please complete the following trailmix before attending our expert-led class: Trailmix, Trailhead Academy

IMPORTANT : If you use your personal computer and a configuration is described in the Computer Setup Guide, you must complete it before attending the class.

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. Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided

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DURATION
2 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Introduction to Lightning Service Console
- Discover Lightning Service Console
- Explore Service Console Components Used for Lightning Page Customization
- Create a Functional Service App Using Service Setup and Setup Assistant

Support Case Management
- Implement Business Processes to Streamline Support Case Management Workflows for Service Teams
- Identify Needs and Considerations for Different Support Case Types
- Customize Fields, Page Layouts, and Record Types for Support Cases
- Define Case Status Picklist Values
- Create Support Case Queues, Assignment Rules, and Escalation Rules
- Set Up Case Entitlements and Milestones to Manage Customer Service-Level Agreements
- Understand Support Agent Collaboration Options Between Service Cloud and Slack

Lightning Service Console
- 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 Options

Salesforce Lightning Knowledge
- Enable Lightning Knowledge
- Assign Appropriate Knowledge User Licenses
- Customize Page Layouts and Record Types to Support Knowledge Article Management
- Manage Sharing Permissions for Knowledge Tools and Processes
- Create and Manage Knowledge Articles to Ensure Information Quality
- Utilize Knowledge Articles to Manage and Close Cases More Efficiently

Flow for Service
- Examine Flow for Service Use Cases
- Introduction to Flow for Service Cloud
- Deploy Screen Flows to Users
- Create a Simple Flow for Community Users

Learn the Foundations of AI
Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.