Fast Lane

Administer and Maintain Service Cloud (ADX261)

ID ADX261   **Price** on request   **Duration** 2 days

Who should attend

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

Course Objectives

- Setup 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
- Setup the Salesforce Service Console app and 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

Course Content

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 the 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 the effective administration of communities.
- Customize the look and layout of the community.
- Add the Reputation component to the community.

Training Centres worldwide

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