

SERVICE CLOUD ESSENTIALS FOR AGENTS



OVERVIEW

Salesforce Service Cloud assists support agents with their daily activities, from collaborating with other agents to logging and resolving cases. In this interactive course, support agents will gain hands-on experience using Service Cloud to share knowledge with each other and with customers, divert cases by creating self-service resources for customers (including knowledge base articles), receive cases through a variety of channels (including CTI and social media), and use a web-based console specifically built for support agents to manage and resolve cases efficiently.

WHO SHOULD TAKE THIS COURSE?

This course is designed for support agents. No prior knowledge of Salesforce is needed. However, it is strongly recommended that all students take the online eLearning course Getting Started: Using the Service Cloud that is available through Salesforce Help and Training.

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

- Help customers resolve their issues using self-service communities
- Learn how to receive customer issues through a variety of channels including CTI and social media
- View and manage customer information and cases in a single console
- Work with specialized automation tools that are meant to increase agent productivity
- Collaborate and share knowledge with customers and teammates



DURATION

- 2 days

DELIVERY FORMAT

- Classroom
- Virtual Classroom

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MODULES & TOPICS

Service Cloud Overview

- Your Support Team
- Service Cloud Features

Cases and Case Channels

- What is a Case?
- Overview of Channels
- Salesforce Communities as a Channel
- Web Chat as a Channel
- Social Customer Service as a Channel

Case Assignment

- Case Assignment
- Case Queues
- Case Escalation

Get Oriented to the Console

- Overview of the Service Console
- Keyboard Shortcuts in the Service Console

Get Oriented to the Console

- Own a Case
- Collaborate on a Case
- Resolve a Case Using Salesforce Knowledge

Deflect Cases with Self-Service Options

- Deflect Cases Using Salesforce Knowledge
- Deflect Cases Using Salesforce Communities

Send Customer Communications from the Console

- Contact Customers through Email
- Contact Customers by Phone
- Contact Customers through Web Chat
- Contact Customers through Social Media

Collaborate Using Chatter

- Collaborate Using Groups and Posts
- Share information about Yourself in a Chatter Profile

Boost Productivity with Reporting

- Measure Performance Using Reports and Dashboards
- Manage Customer Service from your Mobile Device

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