

ADX261

Administration and Maintenance of Service Cloud



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

Salesforce Self-Service Sites

- Outline Self-Service Site Fundamentals
- Review Security Considerations for Site Access
- Enable Digital Experiences to Create an Experience Cloud Site
- Manage Site Administration Using Permission Sets
- Customize the Help Center Layout and User Experience
- Set Up Help Center Support and Self-Service Tools
- Set Up a Channel Menu to Optimize Help Center Service
- Understand the Role of Site Administrators and Content Publishers



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

Service Cloud Reporting

- Discover Service Cloud Reports and Dashboards
- Create Service Reports Using Report Builder
- Measure Support Agent Performance with Call Center Metrics and Key Performance Indicators
- Explore Available Salesforce AppExchange Report Packages
- Measure Experience Site Success

