

Salesforce Certified Admin and App Builder

Lesson 20—Service Cloud



What You'll Learn

- Creating a case, case assignment rules, and case escalation rules
- Enabling and creating solutions
- Attaching solutions to cases
- Creating a Web-to-Case Form
- Creating an Email-to-Case Address




Creating Cases



Keep the following points in mind while creating cases:

- Fill in required fields
- Optional fields, such as Contact Name, are useful
- Select ownership based on assignment rules

 Case Edit
New Case

Help for this Page ?

Case Edit

SaveSave & CloseSave & NewCancel


Case Information

= Required Information


Case Owner

Justin Davis

Contact Name



Account Name



Additional Information

Status

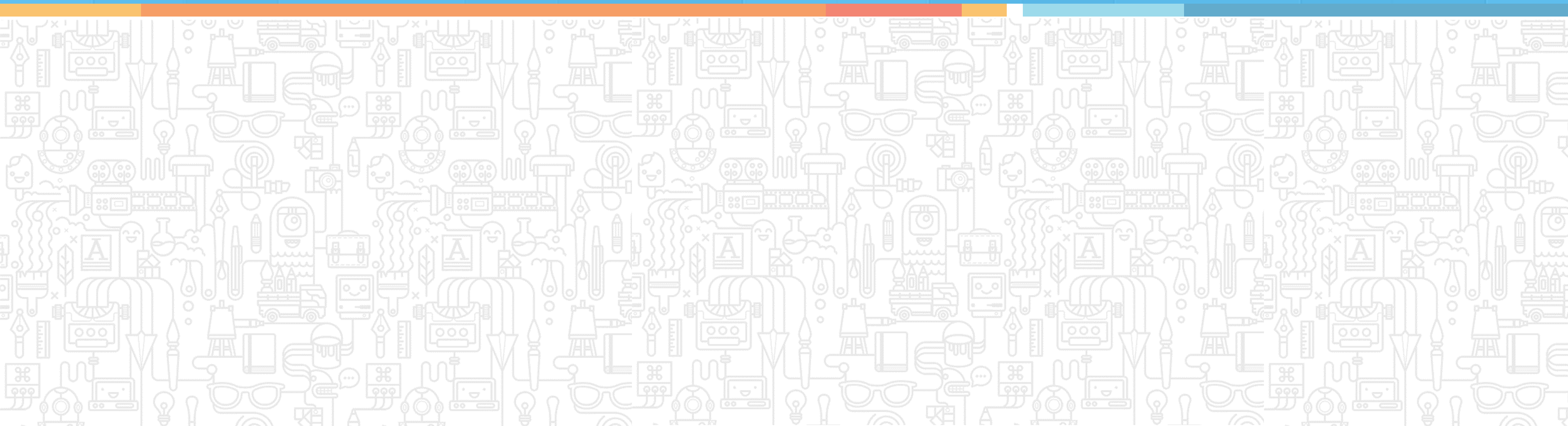
Case Origin

Priority

Type

Case Reason

Creating Case Assignment Rules



Keep the following points in mind while creating case assignment rules:

- You can assign cases to users or queues in a variety of ways
- Only one assignment rule can be active at a time
- You can update case ownership with a user or queue

Case Assignment Rule

Main Office

[Help for this Page](#) ?

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail

Edit

Rule Name Main Office

Active



Created By Justin Davis, 11/23/2015 8:40 PM

Modified By Justin Davis, 11/23/2015 8:41 PM

Edit

Rule Entries

New

Reorder

Action	Order	Criteria	Assign To	Email
Edit Del	<input type="text" value="1"/>	Case: Type EQUALS Feature Request	<u>Justin Davis</u>	<input type="text"/>

Creating Case Escalation Rules



Keep the following points in mind while creating case escalation rules:

- Escalate cases based on timing or case issue
- Control assignments based on criteria and business hours
- Make critical issues visible to management

Step 3: Specify the business hours criteria for this escalation rule

- ☐ Ignore business hours
- ☒ Use business hours specified on case
- ☐ Set business hours



Step 4: Specify how escalation times are set

- ☒ Based on when the case is created
- ☐ Based on when the case is created, and disable after the case is first modified
- ☐ Based on last modification time of the case

Enabling Solutions



Keep the following points in mind while enabling solutions:

- Enable solutions to begin configuring
- Enable Solution Browsing to give access to service representatives
- Enable HTML solutions and solution summary

Turn on the Browse Solutions section on the Solutions tab home page.

Enable Solution Browsing ☒

Turn on Multilingual Solutions.

Enable Multilingual Solutions ☒

Display the Language drop-down list on the Self-Service portal. The Language drop-down list allows Self-Service users to search solutions in the language of their choice or all languages in which solutions are supported.

Enable Multilingual Solution Search in Self-Service Portal ☒

Keep the following points in mind while creating solutions:

- Create solution records to solve common problems
- Attach to cases and send to the customers
- Display internally or publicly



[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

 [Add Tags](#)

Solution Detail

[Edit](#)[Delete](#)

Solution Number 00000001

Public



Status Draft

Visible in Public
Knowledge Base



Attaching Solutions to Cases



Keep the following points in mind while attaching solutions to cases:

- Search for and find solutions based on keywords
- Select relevant reviewed and un-reviewed solutions
- Send solutions directly to customers from case records

Enter keywords to find matching solutions.

Find Solution

Relevant Reviewed Solutions [0]

Customize...

No records were found based on your criteria



Relevant Unreviewed Solutions [1]

Customize...

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
Select	<u>Power reset</u> Press the power reset button	100%	Draft	<u>Justin</u>	0	11/23/2015 8:47 PM

Enabling Knowledge



Following are the features of enabling knowledge:

- You can create content, called articles
- Multiple languages are allowed
- You can create a company-wide Knowledge Base
- Knowledge feature licenses are required

Feature Licenses

[Feature Licenses Help](#) 

Feature Type	Status	Total Licenses	Used Licenses	Remaining Licenses
Marketing User	Active	2	1	1
Apex Mobile User	Active	2	1	1
Offline User	Active	2	1	1
Knowledge User	Active	2	1	1

Configuring Knowledge



Configuring knowledge allows you to:

- Create Knowledge Base articles for internal use or public viewing
- Create article types for categorization
- Make it visible in Communities or the company website

New Article Type

[Help for this Page](#) ?

Article Type Edit

SaveSave & NewCancel

Article Type Information

The singular and plural labels are used in tabs, layouts, and reports.

Label

Offer

Example: Offer

Plural Label

Offers

Example: Offers

Starts with vowel sound

☐

The Object name is a unique identifier used for API purposes.

Object Name

Offer

Example: Offer

Creating a Web-to-Case Form



Keep the following points in mind while creating a Web-to-Case Form:

- Choose the fields from the available fields column
- Choose a “thank you” return URL
- Click the Generate button to create the form HTML

Capture Cases

Select the fields to include:

Available Fields		Selected	
Company	<div>Add</div> <div>Remove</div>	Contact Name	<div>Up</div> <div>Down</div>
Type		Email	
Status		Phone	
Case Reason		Subject	
Priority		Description	

☒ Visible in Self-Service Portal

Enter the URL that the user will be returned to:

URL	<input type="text" value="http://salesforce.com"/>
Language	<div>Default</div>

Generate

Cancel

Creating an Email-to-Case Address



Keep the following points in mind while creating an email-to-case address:

- Create an email address from which new cases can be created
- Set up forwarding rules on your email server
- Contacts will be matched based on email address

Email-to-Case Routing Information

[Help for this Page](#) 

[< Email-to-Case Setup](#)

Email Address Detail

[Edit](#)[Delete](#)[Clone](#)

Routing Information

Source	Email2Case		
Routing Name	Support Team		
Email Address	support@salesforce.com [Verify]		
Created By	Justin Davis , 11/23/2015 8:57 PM	Modified By	Justin Davis , 11/23/2015 8:57 PM



QUIZ

1

What is the primary use of Cases in Salesforce?

- a. Tracking salesperson activities
- b. Viewing reports
- c. Tracking customer service issues
- d. Updating contact information



QUIZ

1

What is the primary use of Cases in Salesforce?

- a. Tracking salesperson activities
- b. Viewing reports
- c. Tracking customer service issues
- d. Updating contact information



The correct answer is **c**.

Cases are used for tracking customer service issues, such as complaints or problems.

QUIZ

2

What is an acceptable action in a case assignment rule?

- a. Update the case owner field
- b. Change the case status
- c. Create a task
- d. Send an email alert



QUIZ

2

What is an acceptable action in a case assignment rule?

- a. Update the case owner field
- b. Change the case status
- c. Create a task
- d. Send an email alert



The correct answer is **a**.

Case Assignment rules update the ownership of cases based on pre-determined criteria.

QUIZ

3

What is the final action of a Web-to-Case form when submitted?

- a. A new case is created in Salesforce
- b. A new task is assigned to the contact from the form
- c. An email is sent notifying users of a new lead
- d. The security of case visibility is updated



QUIZ

3

What is the final action of a Web-to-Case form when submitted?

- a. A new case is created in Salesforce
- b. A new task is assigned to the contact from the form
- c. An email is sent notifying users of a new lead
- d. The security of case visibility is updated



The correct answer is **a**.

When a Web-to-Case form is completed and submitted, a new case is created in Salesforce and assigned to users based on the active case assignment rule.

QUIZ

4

What is the primary purpose of Salesforce Knowledge?

- a. Create an internal-only database of solutions
- b. Provide an internal and external repository of articles to common problems
- c. Allow users to collaborate through uploading documentation
- d. Viewing reports on case statistics



QUIZ

4

What is the primary purpose of Salesforce Knowledge?

- a. Create an internal-only database of solutions
- b. Provide an internal and external repository of articles to common problems
- c. Allow users to collaborate through uploading documentation
- d. Viewing reports on case statistics



The correct answer is **b**.

Salesforce Knowledge provides a knowledge base for internal users, as well as external users such as customers and clients through the use of articles.

QUIZ

5

Which of the following fields are required to create a case?

- a. Subject, Priority, Status
- b. Contact Name, Account Name, Type
- c. Subject, Description, Internal Comments
- d. Status, Case Origin



QUIZ

5

Which of the following fields are required to create a case?

- a. Subject, Priority, Status
- b. Contact Name, Account Name, Type
- c. Subject, Description, Internal Comments
- d. Status, Case Origin



The correct answer is **d**.

The two required fields are case status and case origin.



Case Study

Scenario

Analysis

Solution

United Containers has recently created a customer service department and is in need of customer service management software. Customers are currently calling the main company number and sending emails to the wrong individuals at the company. The number of calls have been steadily increasing, and there is a need for 24/7 coverage.

Scenario

Analysis

Solution

United Containers compared various software applications and decided the Salesforce Service Cloud would fit their needs best:

1. Cases can be assigned using rule-based routing.
2. A Knowledge Base can be created to maximize call deflection.
3. Reports can be created to view customer service team performance.

Scenario

Analysis

Solution

United Containers performed the following steps to implement the service cloud:

1. The case object was customized to fit the customer service department's needs.
2. Case assignment rules were created to route incoming cases.
3. Knowledge was activated and configured with articles.
4. A customer service performance dashboard was created with relevant charts.



Case Study

Scenario

Analysis

Solution

United Containers needs to reduce the cost of responding to customer service inquiries via telephone. Currently the company is spending \$41 per open case, and the goal is to reduce this to \$25 a case. Customers are constantly calling and the company needs to reduce their cost in this department in order to be profitable for the year.

Scenario Analysis Solution

United Containers decided to implement two notable features in Salesforce:

1. Email-to-Case was enabled using the email-on-demand feature.
2. Web-to-Case was enabled and posted on the company website.

Scenario

Analysis

Solution

United Containers performed the following steps to implement email-to-case and web-to-case:

1. A new email-to-case service address was created.
2. A system email was sent to the primary address to verify the address.
3. Web-to-case was enabled and an HTML form was created.
4. The company web developer posted the web-to-case HTML to the company website.

Key Takeaways

- The Service Cloud is for customer service and technical support teams to manage cases.
- Cases can be received through manual creation, email, or web forms.
- Solutions and Knowledge Base are great resources for information.



This concludes 'Service Cloud.'

The next lesson is 'Field Types.'