SERVICE AND SUPPORT APPLICATIONS

Salesforce Admin Certification Study Guide

10% of Exam Content

OVERVIEW

This section covers 10% of the Salesforce Administrator certification exam and focuses on the tools and features used to manage customer service and support operations. You'll need to understand how to automate case management, set up support processes, and leverage Service Cloud features to improve agent productivity and customer satisfaction.

1. CASES AND SUPPORT PROCESSES

What is a Case?

A Case is a Salesforce record that tracks customer questions, issues, feedback, or requests. Cases are the foundation of customer service operations in Service Cloud.

Key Case Fields

- Case Number: Auto-generated unique identifier
- Status: Tracks case lifecycle (New, In Progress, Escalated, Closed)
- Priority: Indicates urgency (High, Medium, Low)
- Case Origin: How the case was created (Web, Email, Phone, Chat)
- Type: Category of the issue (Question, Problem, Feature Request)
- Case Owner: User or Queue responsible for the case
- Subject & Description: Details about the customer issue

Support Processes

Support Processes control which Status picklist values are available for different types of cases. They work with Record Types to create customized case workflows.

Key Points About Support Processes

- Each Support Process defines available Status values for the case lifecycle
- Support Processes are associated with Case Record Types
- Different case types can have different status values (e.g., Technical Support vs. Billing Inquiry)
- Only one Support Process can be assigned per Record Type

EXAM TIP

Know that Support Processes control picklist values for the Case Status field. They work together with Record Types to create different case workflows for different support scenarios.

2. CASE AUTOMATION RULES

Case Assignment Rules

Assignment Rules automatically assign incoming cases to the appropriate user or queue based on defined criteria.

Key Concepts

- Only ONE assignment rule can be active at a time
- Each rule can have multiple rule entries (processed in order by Sort Order)
- Cases match the FIRST rule entry that meets the criteria
- Can assign to Users or Queues
- Criteria can be based on Case Origin, Type, Priority, Product, or any case field

Example Scenario

If Case Origin = Email AND Type = Technical Issue, assign to Technical Support Queue. If Case Origin = Web AND Priority = High, assign to Premium Support Queue.

Auto-Response Rules

Auto-Response Rules automatically send email responses to customers when they submit a case.

Key Concepts

- Only ONE auto-response rule can be active at a time
- Each rule has multiple rule entries processed in order
- Uses Email Templates to send responses
- Can be triggered based on Case Origin (typically Email or Web)
- Sends acknowledgment to customer that case was received

□ EXAM TIP

Auto-Response Rules send automated emails to CUSTOMERS, while Assignment Rules determine WHO owns the case (users or queues).

Escalation Rules

Escalation Rules automatically escalate cases that haven't been resolved within a specific timeframe.

Key Concepts

- Only ONE escalation rule can be active at a time

- Based on Business Hours (when your support team is available)
- Age Over: Set time in hours and 30-minute increments
- Can reassign cases to different users or queues
- Can notify users via email when escalation occurs
- Up to 5 escalation actions per rule entry

Escalation Timing Options

- When case is created
- When case is modified
- When case is owned (assigned to a user)

Example Scenario

If a High Priority case is not closed within 4 hours, reassign to Tier 2 Support Queue and notify the Support Manager.

Case Teams

Case Teams allow multiple users to collaborate on a single case with defined roles and permissions.

Key Concepts

- Case Team Roles define access levels (Read/Write, Read Only)
- Predefined Case Teams: Groups of users frequently assigned together
- Can add internal users and contacts (if enabled as portal users)
- Enables collaboration across departments (Sales, Support, Engineering)

□ EXAM TIP

Remember the limits: Only ONE assignment rule, ONE auto-response rule, and ONE escalation rule can be active at a time. However, each rule can have MULTIPLE rule entries.

3. QUEUES

What are Queues?

Queues are holding areas for records (cases, leads, custom objects) that need to be worked on by a group of users. They enable shared workload management and ensure no case goes unassigned.

Key Concepts

- Cases in queues don't have individual owners - owned by the queue
- Queue members can view and accept cases from the queue
- Queue members can be: Users, Roles, Public Groups, Territories
- Multiple queues can be created for different support teams
- Queues can have email addresses for notifications

Queue vs. Case Team

Queue: Cases waiting to be claimed by available team members (no specific owner yet). Case Team: Multiple people actively working on a specific case together (case already has an owner).

Benefits of Queues

- Efficient distribution of cases based on availability
- Shared ownership prevents cases from being overlooked
- Load balancing across team members
- Visibility into team workload

□ EXAM TIP

Know that users higher in the role hierarchy than queue members can also take ownership of records in the queue, even if they're not queue members themselves.

4. WEB-TO-CASE AND EMAIL-TO-CASE

Web-to-Case

Web-to-Case allows you to capture customer support requests directly from your company's website and automatically generate cases in Salesforce.

Key Features

- Generates HTML code to embed on your website
- Can capture up to 5,000 cases per day
- Supports reCAPTCHA to prevent spam
- Can trigger assignment rules and auto-response rules
- Default Case Origin: Web
- Rich Text Area fields are saved as plain text

Setup Checklist

1. Enable Web-to-Case in Support Settings
2. Generate HTML code (specify fields to include)
3. Embed code on your website
4. Set up auto-response rules (optional)
5. Configure default case owner or assignment rules

Email-to-Case

Email-to-Case automatically converts emails sent to your support email addresses into cases in Salesforce.

Two Implementation Methods

1. On-Demand Email-to-Case (Recommended)

- No software installation required
- Uses Salesforce email services
- Maximum attachment size: 25 MB
- Emails forwarded to Salesforce-provided address

2. Email-to-Case Agent

- Requires agent installation behind firewall
- Accepts larger attachments
- More control over email processing

Key Features

- Creates routing addresses for different support emails
- Automatically matches email sender to Contact/Account
- Thread ID in subject/body keeps email replies linked to same case
- Can trigger assignment and auto-response rules
- Default Case Origin: Email

□ EXAM TIP

Both Web-to-Case (5,000 per day) and Email-to-Case have daily limits. Know that On-Demand Email-to-Case doesn't require installation, making it easier to set up than the Email-to-Case agent.

5. SERVICE CONSOLE AND FEATURES

What is the Service Console?

The Service Console is a specialized Lightning app designed for service agents. It provides a unified workspace where agents can handle customer cases efficiently with all necessary information displayed on a single screen.

Core Components

1. Object Menu (Navigation Bar)

- Dropdown to access Cases, Accounts, Contacts, and other objects

2. Workspace Tabs

- Primary tabs for main records (Cases, Accounts)
- Subtabs for related records under a primary tab
- Enables multitasking without losing context

3. Split View

- Side panel showing list views
- Quick access to queues and case lists without navigating away

4. Utility Bar

- Bottom toolbar with quick access tools
- Can include: History, Notes, Macros, Omni-Channel
- Fully customizable by admins

5. Record Pages (Main Workspace)

- 360-degree view of customer and case details
- Contact and account information
- Related cases, assets, and interaction history

Service Console Features

Omni-Channel Routing

- Automatically routes work items to agents based on skills and capacity
- Supports multiple channels: Cases, Chat, Messaging, Voice
- Monitors agent status and workload in real-time

Macros

- Automate repetitive tasks with a single click
- Can update case fields, send emails, create records
- Examples: Close case, Send standard email, Update status

Quick Text

- Reusable text snippets for common responses
- Supports merge fields for personalization

Knowledge Integration

- Access Salesforce Knowledge articles directly from console
- Attach articles to cases
- Send articles to customers

EXAM TIP

Know the difference between the Utility Bar (bottom toolbar), Split View (side panel for lists), and Workspace Tabs (main record tabs). All are key console features that improve agent productivity.

6. EINSTEIN FOR SERVICE

Overview

Einstein for Service brings AI-powered capabilities to Service Cloud, helping agents work smarter and faster by automating routine tasks and providing intelligent recommendations.

Key Einstein Features

Einstein Case Classification

- Automatically predicts case field values (Priority, Type, Reason)
- Based on Subject and Description text
- Uses machine learning from historical case data
- Can automatically run assignment rules after classification

Einstein Case Routing

- Works with Case Classification
- Routes cases to the right agent or queue based on predicted values

Einstein Case Wrap-Up

- Predicts field values when closing chat cases
- Speeds up case closure process
- Ensures consistency in case data

Einstein Article Recommendations

- Suggests relevant Knowledge articles to agents
- Based on case context and historical resolutions
- Requires minimum 100+ articles and 1,000+ closed cases

Einstein Reply Recommendations

- Generates personalized email responses for agents
- Uses generative AI grounded in CRM data
- Available for multiple channels (Email, Chat, Messaging)

Einstein Bots

- Automated chatbots for customer self-service
- Handle routine questions 24/7
- Escalate to human agents when needed
- Can deflect up to 30% of routine inquiries

EXAM TIP

Understand that Einstein features use machine learning and require historical data to train models. Case Classification needs past cases to predict field values accurately. Article Recommendations need sufficient articles and closed cases.

QUICK REFERENCE SUMMARY

Feature	Key Points
Cases	Records tracking customer issues. Key fields: Status, Priority, Origin, Type, Owner
Support Processes	Control Status picklist values. Work with Record Types. One per Record Type
Assignment Rules	Auto-assign cases to users/queues. Only ONE active at a time. Multiple entries
Auto-Response Rules	Send automated emails to customers. Uses Email Templates. ONE active rule
Escalation Rules	Escalate unresolved cases. Based on Business Hours. Age Over in hours. ONE active
Case Teams	Multiple users collaborating on one case. Roles define access. Predefined teams available
Queues	Shared workload. Cases waiting to be claimed. Members can be users/roles/groups
Web-to-Case	Capture cases from website. HTML form. 5,000/day limit. Supports reCAPTCHA
Email-to-Case	Convert emails to cases. On-Demand (no install) or Agent (behind firewall). Thread ID
Service Console	Agent workspace. Tabs, Split View, Utility Bar. Omni-Channel, Macros, Knowledge
Einstein for Service	AI features: Case Classification, Routing, Wrap-Up, Article/Reply Recommendations, Bots

CRITICAL EXAM TIPS

6. **Rule Limits:** Only ONE assignment rule, ONE auto-response rule, and ONE escalation rule can be active at a time. Each rule can have multiple entries.
7. **Support Process:** Controls Case Status picklist values. Works with Record Types. One Support Process per Record Type.

8. **Queue vs Case Team:** Queue = waiting to be claimed (no owner). Case Team = actively working together (has owner).
9. **Web-to-Case Limit:** 5,000 cases per day maximum.
10. **Email-to-Case Options:** On-Demand (no install, 25MB attachments) vs Agent (install required, larger attachments).
11. **Escalation Rules:** Based on Business Hours. Age Over in hours (and 30-minute increments). Up to 5 actions per entry.
12. **Service Console Components:** Object Menu, Workspace Tabs, Split View, Utility Bar, Record Pages.
13. **Einstein Requirements:** Needs historical data. Article Recommendations need 100+ articles and 1,000+ closed cases.
14. **Macros vs Quick Text:** Macros automate actions (update fields, send emails). Quick Text are reusable snippets.
15. **Auto-Response Rules:** Send emails to CUSTOMERS. Assignment Rules assign to USERS/QUEUES.

PRACTICE SCENARIOS

Scenario 1:

A company wants cases from their website to automatically go to the Web Support team and send customers a confirmation email. What should you configure?

Answer: Enable Web-to-Case, create an Assignment Rule to assign web cases to Web Support Queue, and create an Auto-Response Rule to send confirmation emails.

Scenario 2:

High priority cases need to be escalated to a manager if not closed within 2 hours. How do you accomplish this?

Answer: Create an Escalation Rule with criteria for High Priority cases, set Age Over to 2 hours, and configure escalation action to reassign to manager and send notification.

Scenario 3:

An agent needs to quickly see all cases in the Premium Support queue while working on a current case. Which Service Console feature helps?

Answer: Split View - allows agents to view list views (like queue views) in a side panel without navigating away from their current work.

Scenario 4:

Multiple team members from different departments need to collaborate on complex cases. What feature should be used?

Answer: Case Teams - allows multiple users to be added to a case with specific roles and permissions. You can create Predefined Case Teams for frequently used groups.

Good luck with your Salesforce Admin Certification Exam!