



## SUPPORT

### ALL CHANNELS

- Accept support inquiries from channels where your customers are active, including your website, email, phone, chat, and online communities
- Use automation features to create and assign support cases



## MANAGE

### YOUR SUPPORT PROCESSES

- Establish support statuses for your support processes
- Set up entitlements to enforce your support processes
- Automatically escalate cases based on the criteria you define
- Monitor your overall support activities through reports and dashboards



## BOOST

### ENGAGEMENT AND PRODUCTIVITY

- Promote case deflection through community engagement
- Get a 360-degree view of your customer using the console
- Do more from within the console, including making and receiving phone calls and accessing knowledge articles



## Key terms and concepts

### CRM

Boost your success with Salesforce Customer Relationship Management (CRM), which allows you to manage relationships with your customers and prospects and track all of your interactions.

### ACCOUNTS & CONTACTS

Accounts are companies you do business with, and can be businesses or individuals. Contacts are people who work at accounts. Track important information, including name, address, phone number, and related information like activities, cases, notes, and more.

### CASES

Cases are support issues you are working to resolve for your customers. Track emails, tasks, and comments related to the case, and any articles used to solve the customer's issue.

### KNOWLEDGE

Knowledge is an online, searchable repository of articles, with answers to questions. With knowledge, agents can create new articles in context of the case, and can be recognized and rewarded in real-time.

### LIVE AGENT

Live Agent allows you to live chat with your customers. Boost agent productivity with smart routing, keyboard shortcuts, sneak peek to customer chat, pre-written messages, multilingual support, and more.

### SOCIAL CUSTOMER SERVICE

Social Customer Service allows you to seamlessly help customers on social media channels, including Twitter, Facebook, and more, all through Salesforce Service Cloud.

### CUSTOMER COMMUNITIES FOR SERVICE

Make it easy for customers and agents to contribute questions and crowdsource answers with a rich, engaging, branded community.

### SEARCH

Make searching data easy with powerful search features, including filtering and customizable search results layouts.

### TASKS & ACTIVITIES

Tasks are your to-do items which require follow-up. They can be assigned to you or someone else. Activities are where you log your calls and activities with prospects and customers. Tasks and activities can be related to leads, contacts, accounts, or other records.

### EVENTS

Events are meetings you've arranged with your prospects and customers, all tracked in Salesforce.

### REPORTS

Summarize and analyze your data with reports, which you can display, share, collaborate on, export, and print. Use standard reports or create custom reports. You can subtotal and filter your data to see exactly what you need.

### DASHBOARDS

Access real-time visualizations of your metrics and key performance indicators, through sets of charts and graphs. Visualize multiple reports on a single dashboard, using pie charts, bar charts, and more.

### EMAIL TEMPLATES

Make it easy to resolve cases quickly and consistently by using standard and customizable email templates.

### WEB-TO-CASE

Create a simple online form for customers to submit support inquiries and ask questions, and automatically create cases from submissions.

