**🧭 What is Service Cloud?**

Service Cloud is Salesforce’s customer support and service module. It helps businesses manage **customer inquiries, complaints, and support requests** through multiple channels (email, phone, web, social media, etc.).

**Purpose:**

* Automate service processes
* Streamline case resolution workflows
* Improve agent productivity
* Deliver personalized customer experiences
* Enable 24x7 omnichannel support

**Key Features:**

* Case Management
* Knowledge Base / Solutions
* Web-to-Case
* Email-to-Case
* Auto Response & Assignment Rules
* Case Escalation Rules
* Support Processes
* Case Teams
* Communities & Portals Integration

**🎯 Core Objects in Service Cloud**

|  |  |
| --- | --- |
| **Object** | **Description** |
| **Case** | Tracks customer issues, complaints, or service requests. |
| **Solution / Knowledge Article** | Documents issue resolutions and FAQs for agents/customers. |

**🧩 Case Management**

A **Case** represents a customer issue or request that needs resolution.

**Key Fields:**

|  |  |
| --- | --- |
| **Field** | **Purpose** |
| **Status** | Current state (New, Working, Escalated, Closed). |
| **Case Origin** | Source of the case (Phone, Email, Web). |
| **Contact Name** | Customer linked to the case. |
| **Account Name** | Company associated (auto-populates from Contact). |
| **Parent Case** | Tracks case hierarchy (used for sub-cases). |
| **Assign Using Active Assignment Rule** | Uses rule to assign case automatically. |
| **Send Notification Email to Contact** | Sends acknowledgment email to customer. |
| **Case Number** | Auto-generated unique identifier. |

**Related Lists:**

* **Case Comments:** Track public/private communications.
* **Case History:** Tracks field updates.
* **Case Teams:** Team of users with specific access roles working on a case.

**👥 Case Teams**

* Composed of multiple users (Support Rep, Manager, Product Specialist, etc.).
* Each role has **defined access levels** (Read Only / Read-Write).
* Used for collaborative case resolution.

**🔄 Support Processes**

**Purpose:**  
Define different sets of **Status picklist values** available to users based on their process (e.g., IT Support vs. Customer Billing).

**Steps to Configure:**

* Define required case stages (Status values).
* Create a **Support Process** (select relevant statuses).
* Create a **Record Type** linked to the process and assign it to profiles.

**Result:** Different departments follow different resolution flows.

**🧠 Case Assignment Rules**

**Purpose:**  
Automatically assign cases to users or queues based on criteria.

**Key Points:**

* Only **one rule can be active** at a time.
* Each rule can have **multiple rule entries** with conditions.
* Used when cases are manually created or come from Web/Email.
* Checkbox **“Don’t Reassign Owner”** controls ownership Behavior.
* Case Teams can also be assigned automatically.

**🌐 Web-to-Case**

**Definition:**  
Captures customer issues directly from a website into Salesforce as Cases.

**Steps:**

* Enable **Web-to-Case**.
* Generate a **Web form** selecting fields to capture.
* Specify **Return URL** (redirect page).
* Add form HTML to your website.

**Important:**

* Max 5,000 cases/day.
* Required fields: Name, Email.
* Auto-associates Contact/Account if the email matches existing records.
* Runs **validation rules** before record creation.

**📧 Auto Response Rules**

**Purpose:**  
Sends **automated acknowledgment emails** to customers when a case is created via Web, Email, or Portal.

**Key Points:**

Only **one active rule** at a time.

Each rule has:

* **Sort Order**
* **Entry Criteria**
* **Email Template**
* **From / Reply-To Address**
* **Send to All Recipients** option

Salesforce evaluates rules **sequentially** until a match is found.

**💌 Email-to-Case**

**Definition:**  
Automatically converts incoming customer emails into Cases.

**Use Case:**  
Customer sends an email to “support@company.com” → Salesforce creates a new Case.

**Two Types:**

|  |  |
| --- | --- |
| **Type** | **Description** |
| **Email-to-Case** | Uses a local agent behind company firewall. Handles large emails (>25MB). |
| **On-Demand Email-to-Case** | Uses Apex Email Service (no agent). Simpler setup, limited to 25MB emails. |

**Comparison Table:**

|  |  |  |
| --- | --- | --- |
| **Feature** | **Email-to-Case** | **On-Demand** |
| Requires local agent | ✅ Yes | ❌ No |
| API usage | ❌ | ✅ Counts |
| Max email size | >25MB | ≤25MB |
| Firewall | Keeps inside | Outside |
| Attachments | >10MB | ≤10MB |

**Failure Options:**

* Bounce Message
* Discard Message
* Requeue Message (retry within 24 hours)

**⚙️ Escalation Rules**

**Purpose:**  
Automatically **reassigns cases or sends alerts** when not resolved within a specific time.

**Use Cases:**

* Enforcing **SLAs (Service Level Agreements)**
* Preventing cases from being ignored
* Prioritizing VIP customers

**Key Elements:**

* **Sort Order**
* **Entry Criteria**
* **Business Hours** (for accurate time tracking)
* **Evaluation Criteria** (based on Created Date / Modified Date)
* **Escalation Actions** (who to reassign, when to notify, which template)

**Monitoring Path:**  
Setup → Monitor → Case Escalations

**📚 Solution Management**

**Definition:**  
A **Solution** is a detailed description of a customer issue and its resolution.

**Purpose:**  
To build a repository of reusable answers to common problems.

**Key Fields:**

|  |  |
| --- | --- |
| **Field** | **Description** |
| **Status** | Draft / Unreviewed / Reviewed |
| **Public** | Indicates if it’s published publicly |
| **Visible in Knowledge Base** | Allows customers to view it |
| **Title** | Name of the solution |
| **Description** | Detailed steps for resolution |

**Permissions:**

* Controlled by object-level security & “Manage Published Solutions” permission.
* Reviewed solutions require special access to edit/delete.

**Solution Categories:** Used to group similar solutions for easier navigation.

**🧭 Solution Process**

Defines the workflow for reviewing and approving solutions.  
Different processes can have different review statuses and stages.

**📖 Knowledge Articles (Salesforce Knowledge)**

**Purpose:**  
Centralized **Knowledge Base** built from Knowledge Articles containing FAQs, troubleshooting steps, or policies.

**Key Points:**

* Authored by agents or content writers.
* Published to multiple channels:

Internal Users

Customer Communities

Public Website

* Enables **self-service** and **reduces case volume**.

**🌍 Portals and Communities**

**Earlier Portals (Deprecated):**

* **Customer Portal:** Manage cases, view solutions.
* **Partner Portal:** Access leads, opportunities, cases.
* **Self-Service Portal:** Basic case and solution access.

**Now Replaced by Communities:**

* Combines portal access + social collaboration.
* Allows **Chatter**, custom UI, and branding.
* Connects **internal, partner, and customer users**.

**Differences (Portal vs. Community):**

|  |  |  |
| --- | --- | --- |
| **Feature** | **Portal** | **Community** |
| UI | Old/limited | Modern & customizable |
| Chatter Support | ❌ | ✅ |
| Collaboration | Limited | High |
| Replacement | Deprecated | Current standard |