Service App

"Service Cloud" refers to the "**service**" (as in "customer service") module in salesforce.com.

It also encompasses features such as the Public Knowledge Base, Web-to-case, Call Center, and the Self-Service Portal, as well as customer service automation (e.g. escalation rules, assignment rules).

It is designed to allow you to support past, current, and future clients' requests for assistance with a product, service, billing, etc.

Service Cloud allows users to automate service processes, streamline workflows and find key articles, topics and experts to support the agent. The purpose is to foster one-to-one marketing relationships with every customer, across multiple channels and on any device.

Service cloud can "listen" and respond to customers across a variety of social platforms and automatically route cases to the appropriate agent.

Social customer service is integrated with the Salesforce Customer Success Platform, which allows the social team to gather a comprehensive picture of the customer to inform responses. Service Cloud built on a SaaS model.

Important objects in Service application

1. Case
2. Solution

Case Management

Cases are used to track support issues. If a customer purchases a product or service and calls in for support, this would get tracked using a case record.

A case can be a customer's question or feedback. An open case is unresolved while a closed case is resolved.

Support agents can review access to see how they can deliver better services. While sales representatives can use cases to see how they affect the sales process as responding to your cases keeps your customers happy and enhances your brand.

Important fields:

1. Status:
   It is a required field which describes the status of a Case such as New, Working, Escalated or Closed.

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2. Case Origin:
   It is also a required field and describes the origin of the case that can be Phone, Email or Web.

3. Contact Name:
   It stores the ID of the associated contact which describes that this case is related to this contact/customer.
4. Account Name:
   It stores the ID of the associated Account to the case which describes that this case is related to this account/company. It is auto populated when we select Contact but can be changed later also.
5. Parent Case:
   It stores the ID of the parent case in Case Hierarchy.
6. Assign using Active Assignment rule:
   It is only available when submitting cases manually. When checked it uses the active assignment rule to assign the case to a user/queue. Otherwise the case is assigned to the user submitting the record.
7. Send notification email to contact
   This checkbox when checked sends a notification to the Contact/Customer stating that there case has been registered within our organization and will be resolved soon.
8. Web Email/Phone/Company/Name:
   All these fields gets filled automatically when a case is submitted through our Web-Form or Email. These fields are different from the Contact Email/Phone/Name and Account Name. Also these fields are only visible on the records submitted through other channels like web or Email.
9. Case Number:
   Assigned automatically when each case is inserted. It can't be set directly, and it can't be modified after the case is created. It is used to uniquely identify a record.

Related Lists:

Case Comments

Case comments lets support agents add, edit and delete public and private comments on a case.
All comments appear in this related list and can be private or publicly available to a case's contact on the customer portal, self-service portal or chatter answers.
Comments can be made private or public depending on the sharing model.

Case History

This related list tracks the changes to the case. Anytime a user modified any of the standard or custom field whose history is set to be tracked on the case, a new entry is added to the Case History related list. This list is not editable.

Case Teams

A case team is a team of users that work together on a case. For example it may include support representatives, support manager and a product manager.
Every member in case team has a particular role assigned that determine access to the case, like Read Only or Read/Write and also whether the user is visible to users in the customer portal or not.

Support Processes

Support processes allows to create different process cycle a Support executive follow to resolve a case.

We can set up different support processes to control the steps our users follow to resolve a case because there are different steps through which a case gets in the process of resolving which varies from company to company & department to department.

In a Support process we define the picklist values of Status field which will be available to the user using that support process.

By implementing different support processes, we can have different resolving process cycle for each kind of case.

Support processes are included in record types which can be assigned to user's profile to have a different case resolving process.

Setting up each process takes several steps:

1. Create the case stages needed in the case resolution process.
2. Name the support process, and select what stages are included in that particular process.
3. Create a record type for the support process. Record types link the sales process to the page layout that goes with it.

Assignment Rules:

Case assignment rules are similar to lead assignment rules. It automatically assigns case records to a particular user or queue based on different conditions.
A case assignment rule can contain many rule entries which determines the assignee of a case.

Rule entries contains the conditions a case must meet to be assigned to a user or a queue.

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We can create as many assignment rules as we want but only 1 can be active at a time.

"Don't Reassign Owner" determines if the user whose process stack is in use becomes the owner of the rule entity, or if it remains owned by its creator user.

Case Teams can also be assigned to cases which will help to close the cases more effectively.

Web-to-Case:

The process of capturing cases from website is called Web-to-Case.

It allows organizations to generate a web form which they can add in their company's website using which their Support & Service customers can easily create a case within Salesforce.com.

To allow the cases to be submitted through web we need to enable web-to-case then we need to create a web form.

While generating the web form we can specify the fields we would like to capture from our customers while submitting a case.

In web-to-case form fields like Name and email should always be set required explicitly.

It asks for the return URL also where the page will be redirected when the case will be submitted through the web form.

The values entered through web will be stored in the newly created Case in the Web Name and Web Email fields. If that email address happens to be associated with a Contact in your system, then Web-to-Case will automatically associate that case with the contact who has that email address, and with the account associated to that contact.

If that email address is not found, or Web-to-Case discovers more than one contact with that email address, then Web-to-Case will not know which contact to associate to the case. In that instance, it will leave the Contact and Account fields on the case blank and allow you to fill them (which you can generally find using those Web Name and Web Email fields).

Web-to-Case is limited to receiving 5000 cases per day.

Salesforce runs field validation rules before creating records submitted via Web-to-Case and only creates records that have valid values.

Auto Response Rule:

Case Auto response rules are similar to lead auto response rules. They automatically send an email response to the case submitters who submit the case from Web or Email or Customer Portal or Self-Service Portal.

We can create as many auto response rules as we want but only 1 can be active at a time.

A rule can contain many rule entries.

Rule entry specifies the:
- Sort Order determines the order of evaluation of rule entries.
- Entry criteria which determines that the response will be sent through which rule entry.
- Email template which will be used to the send the response.
- "From" address & Name mentioned in the response.
- Reply-to address where can give the reply of the response.
- "Send response to all recipients" checkbox which allows to send the response to all those mentioned in the To or CC of the original message.

Salesforce processes each rule until it finds a match between the case attributes and the rule entry criteria. When it finds the first match it send the response according to it and other rule entry criteria after it are not evaluated.

If none of the rule entry matches the criteria then response is sent according to "Default Response Template" specified in Web-to-Case settings to the cases registered from Web.

Email-to-Case:

Email to case allows to generate a case automatically when a customer emails in. (generally on support email). It also populates some case information automatically saving manual effort.

Email to case should be used when you have one or more support email addresses which agents handle manually. We can configure more than one Email-to-Case channel if our organization has multiple support email address & processes.

There are 2 methods to implement it:
1. Email to Case:
   It uses an agent on the machine behind organization's network firewall.

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2. On-Demand Email to Case:
   It uses Apex email services to convert email to cases without having to install an agent behind an organization's network firewall.

   Major Differences b/w Email-to-Case & On-Demand Email to Case:

Email-to-Case	On-demand Email-to-Case
Email to case requires an agent to be installed behind an organization's network firewall.	On demand email to case is a simpler version of email to case which does not required an agent to be installed.
It does not contribute to API usage when creating cases.	It contributes to API usage when creating cases.
It accepts emails larger than 25 MB including header, message attachments.	It refuses emails larger than 25 MB.
It keeps email traffic within your firewall.	It does not keep email traffic within your firewall.
It handles attachments more than 10MB.	It only handles attachments from customers up to 10 MB.
When it first came it was known as Email-to-Case as a service.	

Enable Email-to-Case to start accepting emails that will be converted in cases.

In we select On-Demand Email-to-Case there are 3 options that can occur in failure of response:

1. Bounce Message
   The email service returns the message to the sender or to the Automated Case User for On-Demand Email-to-Case, with a notification that explains why the message was rejected.

2. Discard Message
   The email service deletes the message without notifying the sender.

3. Requeue Message (Over Email Rate Limit Action Only)
   The email service queues the message for processing in the next 24 hours. If the message is not processed within 24 hours, the email service returns the message to the sender with a notification that explains why the message was rejected.

Routing address specifies email ids from which the emails need to be converted as cases. There can be more than 1 routing addresses for an organization.

After verifying the email id in routing address Salesforce provides Email Service Address on which we can get emails that will be converted in cases for our organization.

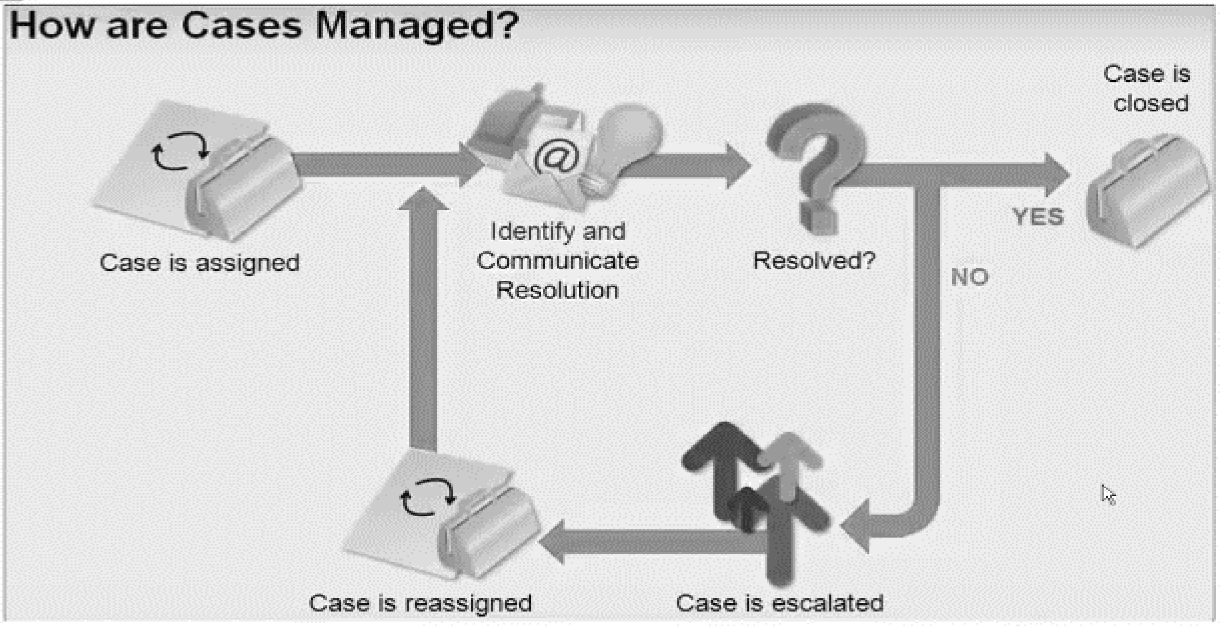
Note: Salesforce will automatically relate the contact and its associated account to the case if the from email id matches the email id from any of the contact record's email id.

Escalation Rules:

Case escalation rules are used to reassign and optionally notify individuals when a case is not closed within a specified time period.

Case Escalation rules are used to:

- Ensure that cases do not go unresolved by support agents or
- Ensure that the customer support team is meeting customer service-level agreements or
- Prioritize support of important customers.



Case Management Lifecycle

We can create as many escalation rules as we want but only 1 can be active at a time.

A rule can contain many rule entries.

Rule entry specifies the:

- Sort Order which determines the order of evaluation of rule entries.
- Entry criteria which determines that through which rule entry the case is eligible for escalation.
- Business Hours criteria for the rule entry.

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It specifies the hours on which the support team is available to serve customers.

It makes the escalation process more accurate.

Business hours help organization set the working time of support team of different locations and different time zones which makes it easy to calculate the time related to cases.
An organization can have many different business hours for different time, team and locations.

Every rule entry can have its own business hours set according to which the time for escalation gets evaluated. Also there is an option which ignore the business hours and calculate the time irrespective of business hours.

- Evaluation criteria of escalation times:

  It helps to calculate the Age Over time of a case. It has 3 options according to which it is calculated:

  1. “When the case was created” calculates the age over time from the created date/time of case.

  2. “When the case was created and disable after the case is first modified” does not escalate the case if the case record is modified after creation and the Age Over time is calculated according to created date/time.

  3. “Based on last modification” calculates the age over time from last modified date/time of case.

  Note: The calculation of age over time depends on the business hours also, if selected.

Escalation Actions:

These define that after how much time the case should escalate and to whom the case should be reassigned. Also we can specify to whom the notification email should be sent of its escalation with respective email templates.

Note: We cannot set the same Age Over time for 2 actions in a rule entry.

Case Escalations can be monitored under Setup→ Monitor→ Case Escalations.

Solution Management

Solution is a detailed description of a customer's issue and the resolution of that issue. Solutions can streamline the communication of common case resolutions, improving support agent productivity and response time to customers.

Solutions are used to document and communicate common resolutions to cases.

For instance

- If customer A calls in with a problem and steps 1-5 must be taken to resolve the issue, these steps can be entered into a solution.
- When customer B calls in with the same problem, instead of retyping steps 1-5, the customer support agent can reference the solution to quickly communicate the resolution.

Solutions tab displays a homepage that lets you quickly locate and manage solutions.

If your organization uses solution categories, you can browse for and find solutions by category.

Important Fields:

1. Status:
   This field defines the status of a solution that whether it is saved as a Draft or as an Un-reviewed solution or as a reviewed solution.
2. Public:
   It indicates whether the solution has been published or not as a public solution.
3. Visible in Knowledge Base:
   It makes the solution visible in public knowledge base where customers can see the solution without logging in or without registering the case.
4. Title:
   Specifies the title for the solution.
5. Description:
   Steps which will help to resolve the case using this solution.

Solution Permissions

Solutions do not use sharing rules instead, object-level security and the "Manage Published Solutions" privilege determine what access the user has to solutions.

Each solutions can be optionally marked as "Reviewed". To edit/delete solutions in a "Reviewed" status, the user must have the "Manage Published Solutions" privilege.

Solution Category

Solution categories allows to group similar solutions together. Create solution categories to keep solutions organized and to allow users to easily navigate your public solutions.

Users can then browse and search solutions based on categories.

To add solutions under a category, add the solution category related list on the page layout and add the category on the solution.

Solution Processes

You can set up different solution processes to control the steps your users follow for solution reviews because there is a different level of knowledge in each solution type, the review processes and values in the Status field could be different.

By implementing different solution processes, you can have different review cycles for each kind of solution.

Setting up each process takes several steps:

1. Create the opportunity stages needed in the sales process.
2. Name the sales process, and select what opportunity stages are included in that particular process.
3. Create a record type for the sales process. Record types link the sales process to the page layout that goes with it.

Knowledge Articles (Salesforce Knowledge)

Salesforce Knowledge lets us create and manage our company information and securely share it when and where it is needed.

Salesforce Knowledge base is built from knowledge articles, which are documents of information.

Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions like, how much storage your product supports.

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Experienced service agents and internal writers write the articles. The articles are then published to a range of channels: internal database, customer and partner communities, or public websites.

Portals & Communities

Salesforce portals and communities empower your customers and partners by providing a social forum directly related to your internal business processes so that they can connect with the right information and the right people at the right moments.

Portals were a thing of past they are not available for new organizations. When it was available there were different portals for organizations like

1. Customer Portal: It allows customers to manage their cases, view solutions/knowledge, contribute to communities (questions, answers, ideas), and access data within custom objects.

2. Partner Portal: The key difference between customer portal and partner portal is that partner users can access leads and opportunities. This allows your organizations and its partners to collaborate on your organization's sales pipeline. Partners can also manage cases, view solutions/knowledge, contribute to communities (questions, answers, ideas), and access data within custom objects.

3. Self-Service Portal: It allows customers to manage cases and view solutions/knowledge.

Communities replaces these portals. Portals essentially gave external users (partners, customers, etc.) the ability to access Salesforce whereas Communities is aimed at connecting the right people (whether internal users, partners, or customers) together within Salesforce. The structure of the features is similar, but there are several differences as well:

1. External users (partners/customers) can communicate via Chatter in Communities. Portals do not support Chatter.
2. The standard Communities user interface is very close to that of a regular internal Salesforce user. The out of the box portal user interface looks dated.
3. The licensing model for each is similar; however, Communities may have a slightly higher fee.

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