Introduction To Service Cloud

Agenda

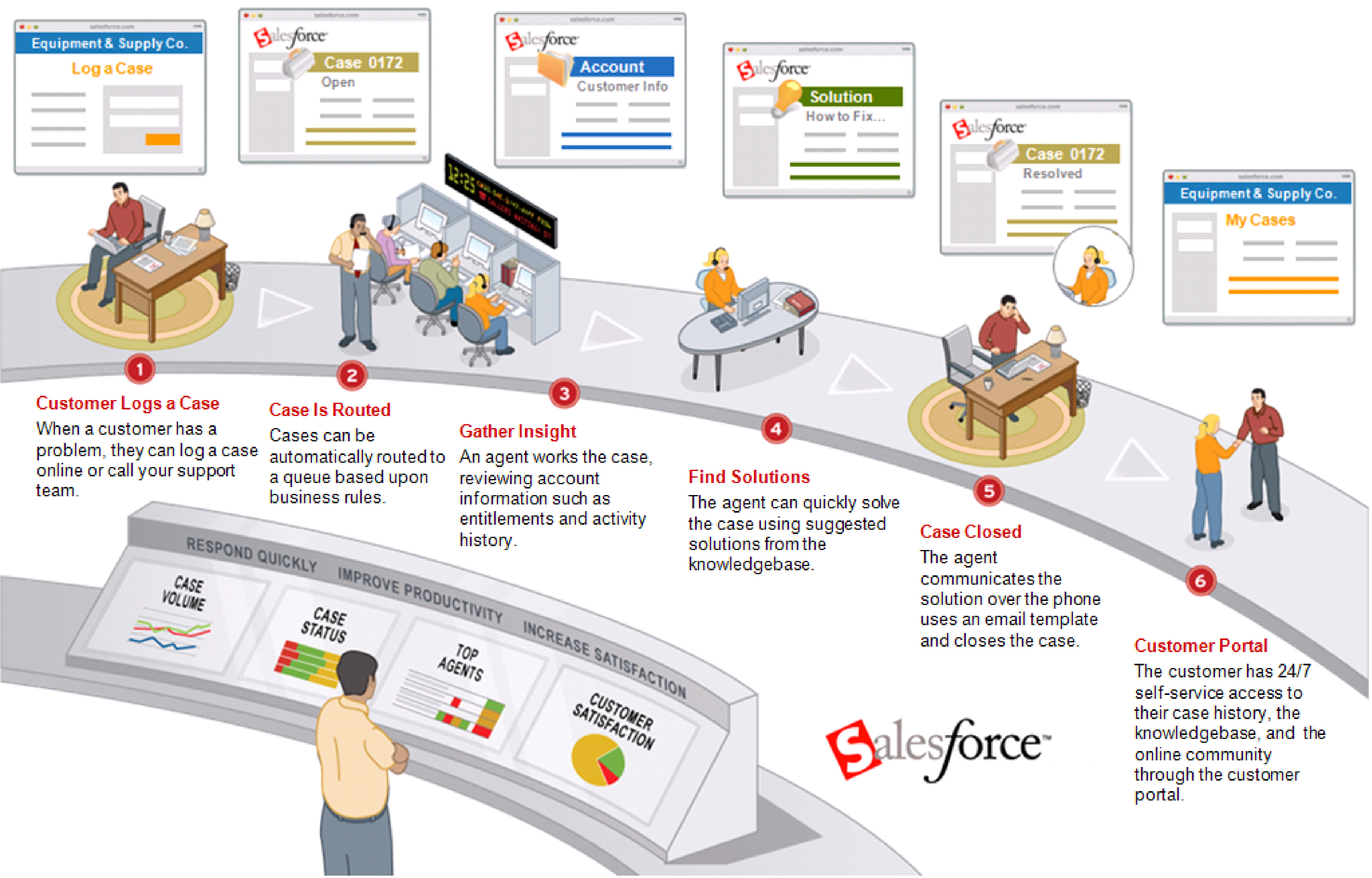
- How CRM helps
- Set up Case process/recordtype/path
- Assignment Rules configuration
- Auto response rules
- Web to case configuration
- Email to case
- Omni channel and service console setup

- Key benefits

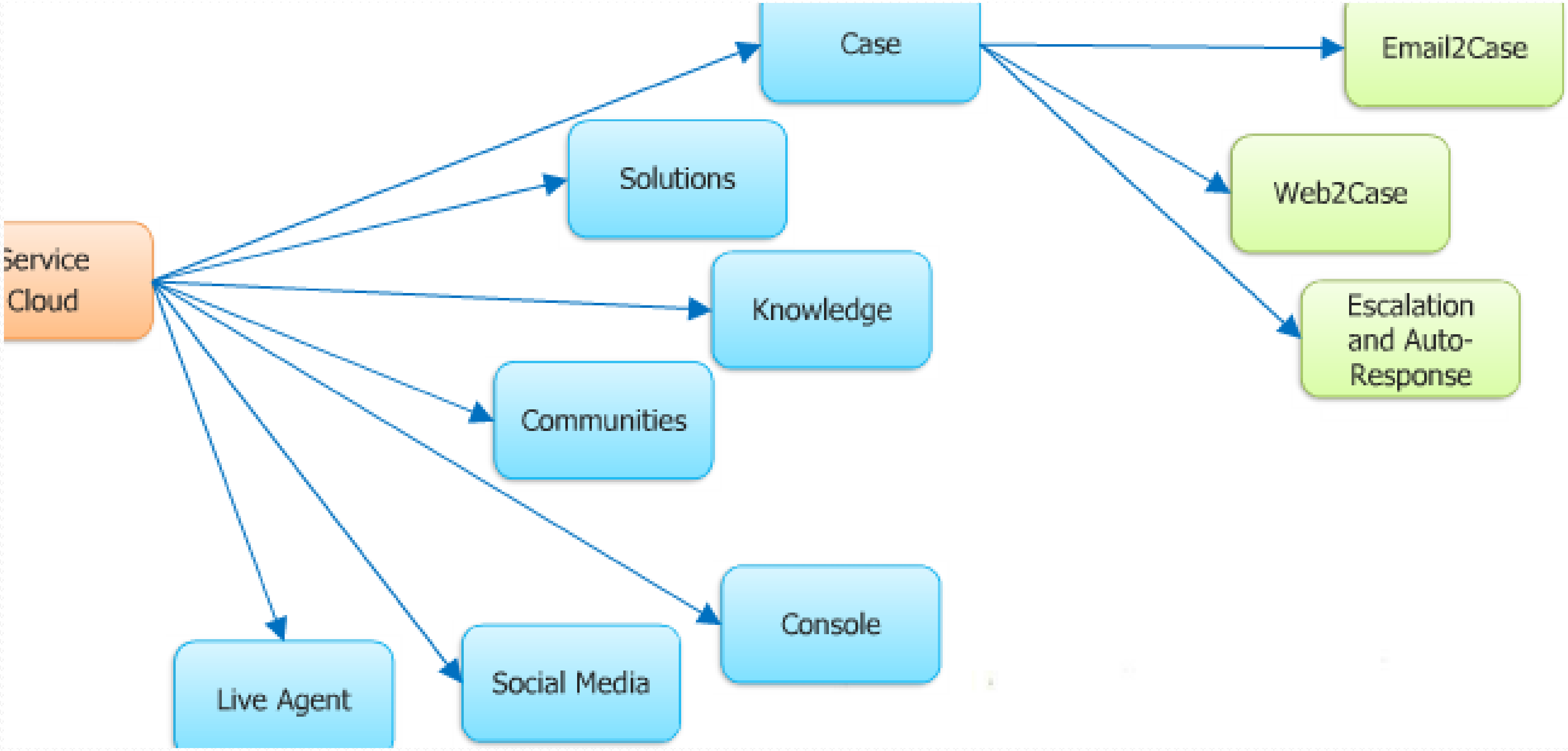
- Increased per-customer revenues,only 11 percent of repeat customers are worth the sales and service team effort than servicing all the rest.
- Greater cross-sell and up-sell success
- Trimmed sales cycles
- More-efficient call center operations
- Improved sales forecasting
- Fewer customer issues
- Better-informed marketing decisions

Streamline Your Service and Support Organization

Effective customer service benefits everyone—customers, agents, supervisors, and the company's bottom line. Deliver outstanding and consistent service and support across many channels including phone, email, Web, and chat.



Main modules



Case Object

→ Customer issues related to products they purchased are usually captured and tracked as cases

→ Customer can raise request to enquire about the product and need not be a problem always

→ Customer who have a phone or internet connection or credit card may raise tickets / cases for issues faced by them

→ Typical end users will call - center agents, technical support teams etc.

→ Call routing may be required if there are multiple products / services being supported by the same team / app

→ Technicians and resolve issues by

Talking to customers

Emailing them

Live agent desktops

Visiting the customer in-person

→ Cases will go thru different status till final solution is found

Case Process

→ Products like laptops, desktops and smart phones may have a specific process with different statuses like New, In progress, Resolved etc

→ Process for Typical inquiry can be simpler with lesser steps

→ You can create different stages, page layouts using a combination of process type, record types, "Support Processes"

→ Life-cycle of a case may typically have the following stages

  »Identify and Qualify

  »Capture

  »Research and Resolve

  »Communicate

  »Close

Core Functionality in service cloud

Web to case :Build Web forms to capture case quickly with click and drag.

Email to case:Create email routing for cases. Any emails sent to this id will be converted to a case.

Assignment Rules:Helps automatically route cases to queues or users.

Auto Response rules:Create template to autorespond to users when cases are created.

Escalation rules :If cases are not resolved on time,auto escalate notifications to supervisor or other teams. Always in hours minimum being one.

Service Cloud Console:Handy app for agents to work on multiple objects and information ,while maitaining context. Contains feature like softphone layouts,Omni channel routing of queues to end users,live agent.

Web2case

→ Web2case helps you create a new case automatically in SFDC from an external website

→ Go to Setup → Build → Self-service → Web-to-case settings

→ Check the "Enable Web-to-Case" checkbox

→ Select Default case origin as web or phone or email. Web is the most relevant

→ Select a Auto-response template

→ Go to Setup → Build → Self-service → Web-to-case HTML Generator

→ Select all fields that are required to appear on the website

→ Provide Return URL after user submits the records

→ Click on "Generate" button to get the HTML code for the web2case page

→ This HTML page can be stored on your desktop to test or deployed to an external website and create case in SFDC

→ Ensure you hit Generate button when you want this case to be created in a different org after logging to that Org as the ORGID is also part of the HTML page

→ You can configure Auto - response rules to respond to these cases either from web or email

→ You can capture up to 5000 cases per day and once you cross the limit mails are route to a pending request queue (which has a 50000 per day limit! Case and lead together)

Email2case

→ Email –To- Case helps you create cases automatically in SFDC based on email to a email address specified by the customer

→ There are two options 1) Email-To-Case 2) On-Demand Email-to-case

→ Email-To-Case uses the agent that needs to be downloaded installed behind your firewall

→ On-Demand Email-to-Case enables you to solely use Force.com to convert email to cases and up to 25 MB mail size

→ Email-to-Case enables you to use salesforce.com and your email system to convert email to cases and more than 25 MB mail size

→ Setup→ Build→ Customize→ Case→ Email-to-Case

→ Provide a Routing Addresses, Click on New with Email2Case selected in the picklist

→ Provide a valid working mail id for on-demand Email-to-case. You can test with a personal Gmail id.

→ You will receive an email on your personal id , once it is verified salesforce will provide a valid salesforce email id like Salesforce.com automatically created for the following email service address for you:

→ Configure your email system to forward messages received at cloudforcesigma@gmail.com to this email services address.

→ Once all of this is done, please send an email to your personal Gmail id.

→ This will automatically create a case in SFDC

Assignment Rules

→ Case assignment rules help you to assign cases to different queues or users depending on certain criteria like case source , it could be web or email or any other source

→ It is possible to customize standard rule that comes by default

→ You can have multiple rule entries , the sample has multiple 5 rule entries

→ Set the order in which each rule entry will be processed

→ Select the user or queue to which this will be assigned and email template

→ You can also select case teams if Case teams have been setup

→ Be careful about designing the rule entry criteria in such a way that the last rule does catch cases that have not met the entry criteria specified in the previous rule entries.

Escalation rules

→ Every help desk will have a SLA to respond to cases depending on their priority

→ For example: P1, P2, P3 priority cases have to solved in different time windows

→ Escalation rules can be set on case ageing as well other criteria

https://help.salesforce.com/HTViewHelpDoc?id=creating_escalation_rules.htm&language=en_US

Knowledge articles

→ Knowledge articles can be associated to case before it is closed unlike solutions

→ Users can edit , create and publish the knowledge articles

→ Knowledge article can be versioned

→ Salesforce Knowledge needs separate license to be purchased

Communities

→ Communities is a way to collaborate with business partners and customers, distributors, resellers and suppliers who are not part of your organization

→ Typically, these are people who are not your regular SFDC users but you want to provide them some channel to connect with your organization and provide them access to some data as well

→ You can drive more sales

→ Improve customer service by integrating with Chatter, Salesforce Knowledge , Social collaboration etc.

→ You can create multiple communities in your organization where each one are for different purpose

→ Communities are part of your org and accessible from browser as well as Salesforce1 mobile

→ Communities need additional license for external users to login

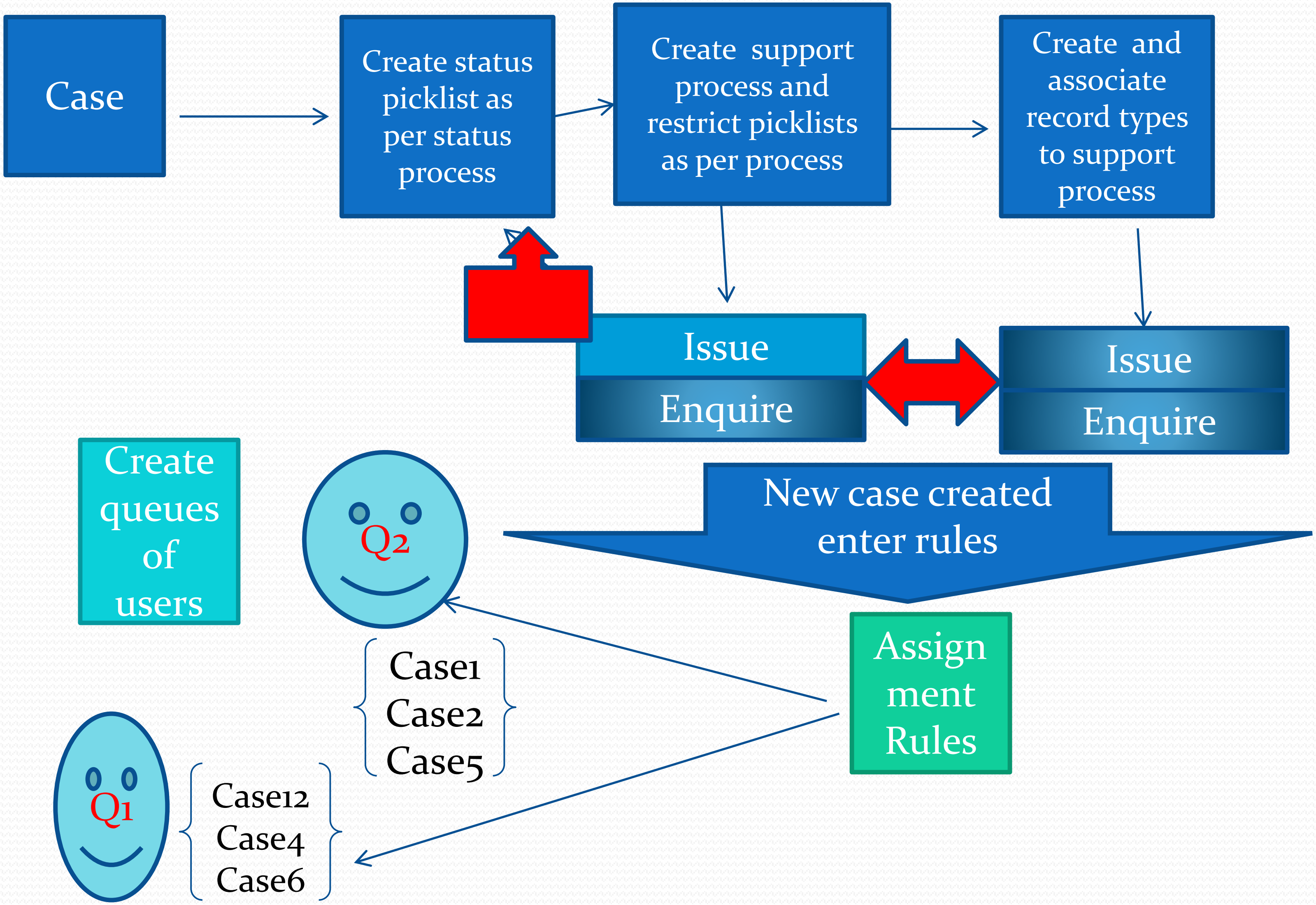
→ You can also make it available to guest users without licenses

→ Communities is an online platform that has more features than Portals

Communities

- → Go to Setup → Build → Customize → Communities
- → "View Global Header" permission to be enabled to all internal users
- → You can create or manage existing Communities
- → You can create Customer community or Partner community licenses , you can set number of partner or customer roles
- → You can also enable "Partner Super User Access"
  - » To create a new customer community user Partner or Customer User
  - » Create a new contact on an existing account and save
  - » Open the contact and Click on the "Manage External User" → "Enable Partner User"
  - » You will be taken to the new user screen, select "Partner Community" license
  - » For more details refer to Communities Implementation Guide and link below. Basic information is good for this course and advanced will be part of Sales Cloud training

  https://help.salesforce.com/HTViewHelpDoc?id=networks_create_external_users.htm&language=en_US


Case
Create status picklist as per status process
Create support process and restrict picklists as per process
Create and associate record types to support process
Issue
Enquire
Issue
Enquire
Create queues of users
Q2
New case created enter rules
Case1
Case2
Case5
Assign ment Rules
Q1
Case12
Case4
Case6

Labs

- Setup support process
- Web to case
- Email to case
- Assignment
- Escalation rules
- Auto response rules
- Service cloud console
- Omni channel
- Liveagent