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Course Outline :: ADX261::

Module Title	:	**Service Cloud Administration in Lightning Experience**
Duration	:	**2 days**

OVERVIEW

Service Cloud Administration in Lightning Experience is a must for experienced administrators who need to configure and maintain the Service Cloud for their organizations. Using real-world scenarios, this course will teach administrators how to configure Salesforce Knowledge, set up service contracts with milestones and entitlements, set up the Service Console application, add the Softphone Utility to your Lightning Console, and set up Web Chats. This course will also teach administrators how to configure a Customer Community.

WHO SHOULD TAKE THIS COURSE?

Administrators with at least six months experience using Salesforce and/or administrators who have completed the Administration Essentials for New Administrators course

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Setup the case management process automating the support process with queues, assignment/escalation rules, and Process Builder
- Configure Salesforce knowledge to help you manage the creation, publication, and maintenance of knowledge articles
- Enable entitlements to set up service contracts
- Setup the Salesforce Service Console app and to help your support reps work more efficiently
- Understand the capabilities of the Softphone Utility in the Lightning Console
- Configure online chat with customers using Web Chats
- Understand and set up Communities

MODULES & TOPICS

Case Escalations and Entitlements

- Create processes to streamline a support team's workflow and case management.
- Customize fields, page layouts and record types for different kinds of support cases.
- Define picklist values for each new record type.
- Create case assignment rules, queues and escalation rules to push cases to the appropriate support team at the appropriate time.
- Create and manage entitlements to customize the level of support for each customer.

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Salesforce Knowledge

- Enable Lightning Knowledge and assign appropriate user licenses.
- Customize page layouts and record types to support knowledge article management.
- Customize access to, permissions for, and visibility of knowledge tools and processes.
- Create and manage articles to ensure quality of information.
- Manage and close cases more efficiently using knowledge articles.

Lightning Service Console

- Create your own Service Console app.
- Customize the Lightning Console pages.
- Add Utilities to your Console.
- Enable and utilize Chat (formerly Live Agent).
- Optimize the use of Omni-Channel.

Salesforce Self-Service Communities

- Enable communities in your Salesforce org.
- Create a permission set for effective administration of communities.
- Customize the look and layout of the community.
- Add the Reputation component to the community.