Service Cloud Cheatsheet

salesforce service cloud

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.

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WEBSITE, SOCIAL, ONLINE COMMUNITIES
- Website visits
- Social mentions
- Community posts

WEB-TO-CASE & MORE
- Support inquiries
- Private questions

CALLS
- Incoming calls

CREATE OR UPDATE CASES
- Search in Salesforce and update open cases or create a new case

EMAILS, CHATS, & MORE
- Incoming emails
- Incoming chats
- Video calls & more

EMAIL-TO-CASE & MORE
- Automatically create cases from emails & incoming chats

CASE CREATION
- Set up auto-response emails
- Direct to self-service options
- Smart routing
  - Evenly distribute cases to qualified agents
- Set up queues and case assignment rules
  - Channel
  - Product
  - Geography

SUPPORT PROCESSES
Define case statuses to support your process. Create multiple processes as needed.

ENTITLEMENTS
Enhance and enforce your support processes. Verify if your customers are eligible for support. Specify Service Level Agreements (SLA) for each customer.

ESCALATION RULES
Automatically escalate cases open beyond a certain period of time or where an SLA has expired.

REPORTS AND DASHBOARDS
Track Key Performance Indicators (KPI) and important service metrics including average resolution time, first call resolution, and customer satisfaction.

KNOWLEDGE
Centralized, searchable repository of up-to-date content. Make articles accessible to employees and customers.

CTI
Make and receive calls right from Salesforce with integrated softphone controls.

COMMUNITIES
Provide your customers with an online experience where they can ask questions, access articles, and connect with each other. Promote case deflection while providing a rich self-service experience.

CONSOLE
Gain a 360-degree view of your customers with a user experience designed for fast-paced environments. Users can toggle between tabs, collaborate in context, and build lasting relationships with customers.