

*Making Everything Easier!™*

# Salesforce Service Cloud

FOR  
**DUMMIES**<sup>®</sup>  
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## **Learn to:**

- Enable your agents to provide efficient service
- Interact with customers through any channel
- Improve internal communication and collaboration
- Resolve customer's questions in a timely manner

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# Introduction

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Welcome to *Salesforce Service Cloud For Dummies*, a guide for longtime or new users of Service Cloud, a customer service application released by Salesforce that runs in the cloud. For our purposes, running in the cloud means that you get login credentials (a username and password) and use them to access your database from wherever you want. Think of it like Netflix or Gmail. No matter where you are, what time of day it is, or which device you choose to use, you can open your application and continue working from where you left off. The Service Cloud is one of the fastest-growing segments of Salesforce's business, helping customers worldwide address *their* customers' problems and needs in real-time, and this book sets out to cover it in an organized and succinct way.

## ***About This Book***

This book is for anyone looking to improve their customer service experience. Anyone can read this book, really, but it's intended for service reps, administrators, call center executives, or Salesforce enthusiasts who want an inside look at the features and capabilities of Service Cloud. It shows you how you can transform your customer care business with clicks not code, from anywhere, at anytime, in a matter of hours or days instead of months or years.

This book also takes an inside look at Communities and Salesforce Knowledge, two major and exciting new features that remain elusive to many.

Use this book to better support your customers, to collaborate with your teams, and to get the insights you need to improve your customer service business:

- ✓ **Faster support:** Collaborate with Chatter, streamline your view with the console, and serve your customers from anywhere with the mobile app.
- ✓ **Intelligent customer service:** Search your knowledge base for the answers your customers need.
- ✓ **Multichannel support:** Let your customers decide how they want to be supported. Chat with Live Agent, support customers on social media channels on any device, or give them the tools to help themselves with Communities.
- ✓ **Personalized service:** Use Service Cloud to get a complete view of your customer and always have their information at your fingertips.

**Note:** Not every portion of this book applies to your edition of Salesforce. Service Cloud has a number of editions, including Unlimited, Enterprise, and Professional, each with its own features and pricing. There are also certain topics we cover that require feature licenses, which come at a cost. We make sure to point these out where they appear.

Within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

# ***Foolish Assumptions***

In writing this book, we made a few assumptions about you:

- ✓ You have a computer with internet access. (Don't laugh.)
- ✓ You're working in customer service and have customers or you at least want to join the field.
- ✓ You sell a product or service, or otherwise just possess a minimal level of business experience.
- ✓ You know that Salesforce is a database. If you didn't, now you do.
- ✓ You have access to an instance of Service Cloud to follow our (flawless) instruction.

# ***Icons Used in This Book***

As you read this book, you'll notice a number of icons used along the sides of the page. These icons are meant to serve as callouts for specific features, potential hiccups, or associated costs that you should be aware of. Here's what each icon means:



We use the Tip icon to notify you of best practices, shortcuts, and additional functionality that may be of interest to you. Anything marked with this icon helps you navigate, configure, and use Salesforce more effectively regardless of your role.





Be sure to read each and every Warning icon as you move through the book. You'll find out about extra costs or irreversible decisions.



The Technical Stuff icon jumps out at you when we feel the need to tell you something you likely don't care about. For those fellow geeks out there, please enjoy the Technical Stuff paragraphs.



When you see the Remember icon, we're either reminding you of something important that we may have explained previously, or giving you a little nugget of knowledge to stick in your back pocket and save for later.

## ***Beyond the Book***

With *Salesforce Service Cloud For Dummies*, the fun doesn't stop at the turn of the final page. Check out these great resources for even more information:

✔ **Cheat Sheet:** What's that? You didn't remember everything you read? No problem! The online Cheat Sheet can help you get started with Service Cloud. You can find it at

[www.dummies.com/cheatsheet/salesforceservicecloud](http://www.dummies.com/cheatsheet/salesforceservicecloud) .

✔ **Dummies.com online articles:** If you need a sampler or don't have time to wait for the book, you can check out our online articles about Service Cloud. We provide some quick-hit details on key information

and functionality about Service Cloud. Check it out at [www.dummies.com/extras/salesforceservicecloud](http://www.dummies.com/extras/salesforceservicecloud) .

## ***Where to Go from Here***

If you're completely new to Salesforce, flip the page and begin learning about the wide world of Service Cloud. If you're a beginning administrator and you have a deadline, you may want to jump ahead to [Chapters 19](#), [20](#), and [21](#). If you're an experienced administrator researching Knowledge or Communities, jump to [Chapter 13](#) or [15](#), respectively. If you're a customer support agent, turn to [Chapters 4](#) and [5](#). If you're a manager, you can begin tracking and measuring your team's effectiveness in [Chapter 16](#). No matter what you've come to *Salesforce Service Cloud For Dummies* to find or learn, we're sure you'll find what you're looking for.

## Part I

# Getting Started with Salesforce Service Cloud



*For Dummies* can help you get started with lots of subjects. Visit [www.dummies.com](http://www.dummies.com) to learn more and do more

with *For Dummies*.

## *In this part . . .*

- ✓ See how Salesforce Service Cloud addresses and solves critical business challenges.
- ✓ Discover how easy it is to use and navigate through Salesforce.
- ✓ Personalize the system to make it your own and manage your business the way you want to.
- ✓ Understand important foundational Salesforce concepts and terminology to set you up for success.

# Chapter 1

## Solving Business Challenges with Service Cloud

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### *In This Chapter*

- ▶ Putting smiles on your customers' faces
  - ▶ Gauging the health of your business
  - ▶ Storing information in one place
  - ▶ Working smoothly with your team
  - ▶ Accessing data on the go
  - ▶ Building customer loyalty
- 

What keeps you up at night? Your profit margins? Your lack of visibility into what affects those profit margins? Is it that your employees don't address customers as well or as quickly as you'd like them to? And is that because they don't have access to the right information? Take a moment to think about your biggest concerns for your business. Odds are, Salesforce can help!

Salesforce is simpler than most customer relationship management (CRM) tools. By keeping things simple, Salesforce enables you to spend more time concentrating on your business challenges and less on troubleshooting the system. Understanding how to use and customize Salesforce, as well as properly aligning it to your business process, is the key to putting in place a powerful tool that will simplify your path to success.

In this chapter, we provide a high-level overview of native Salesforce features designed to address typical business challenges. We cover these common business problems and show you how to leverage Salesforce to ameliorate or even eliminate them.

## ***Keeping Your Customers Happy***

The customer is where everything starts. Customers are the lifeblood of any business. Without them, sales would be meaningless, service wouldn't exist, and there would be no one to market to. This concept may seem obvious, but research shows that customer service is one of the most commonly overlooked aspects in lost business. It's also one of the most influential aspects in bringing about repeat business and customer loyalty.

Customers expect excellent service. They want their issues resolved conveniently, painlessly, and as quickly as possible. One of the most effective barriers to providing excellent service is actually pretty simple to solve: In order to keep customers happy, you need to be able to readily access their information.

As a customer service representative, how much time have you wasted trying to identify a customer? Do you stumble and stall while trying to hunt for his previous support interactions? In this day and age, it's unacceptable not to have a 360-degree view of your customer (see the nearby sidebar). Without this critical ingredient, you're needlessly putting your organization at risk of losing a customer for good.

Salesforce Service Cloud helps businesses keep their customers happy by keeping their information in one

central place. From one page, you can see a customer's personal information, as well as his recent interactions with your agents and the products he's purchased. Your agents have access to everything they need when they get that customer on the phone. Your customers will be pleased to have someone address their issue quickly without having to explain their backstory.



Even with the most customer-centric technology on earth, you can't truly create meaningful customer relationships without *people*. Your customer service representatives are vital to the success of any service organization. A holistic approach to customer service begins with your employees genuinely caring about and listening to your customers. Empathy and understanding — combined with the power of knowing who the customer is and the customer's history with your company — are gold.



Everyone on your team should be empowered to act on the deep understanding they have of your customers, as well as the desired customer experience. So, if Larry only contacts your business via email and never wants to receive phone calls, you can ensure that anyone servicing Larry will respect his wishes.



## The 360-degree view

You may hear people refer to needing "a 360-degree view of the customer," but what does that mean? Generally speaking, when a customer interacts with your business, you must have a 360-degree view of the customer, or a



way to draw from a rich repository of information pertaining to that customer. In other words, a 360-degree view of your customer allows you to see her personal information and, on the same page, view recent purchases, renewals, complaints, or phone conversations. This information is useful in multiple respects. Not only does it help to expedite the service process (thereby increasing customer loyalty and satisfaction), but it also saves you money, buys more time for your reps, shortens hold times, and facilitates upsell and cross-sell opportunities.

It is also worth mentioning that your customers may have customers themselves. Knowing the ultimate goals of your customer, who they sell to or provide services for, does wonders for your relationship with them, and the good news is that all this is possible with Salesforce.

With a 360-degree view, you can more effectively guide your approach to interaction with customers and service them in a much more personal and profound way. This does more than keep them happy — it creates loyalists for your brand.

## ***Measuring the Health of Your Business***

If you aren't gauging the health or progress of your business, trying to improve it won't get you far. The first step in improving your business is benchmarking: You need to know where you are before you can determine where you want to go.

Service Cloud allows you to quickly create and capture a multitude of data points that you deem most important to the success of your business. This, in turn, benefits all levels of your organization so that everyone from a first-tier support rep to the CEO can get real-time actionable information pertaining to the health of the organization. Service reps can check how many issues they've remediated this week, managers can drill into urgent escalations, and the CEO can view steady decreases in operational cost in response to her call-deflection strategy.

Service Cloud brings this all together by organizing only those data points you want to see into meaningful reports and comprehensible dashboards. Charts, graphs, and easy-to-use formulas are only the beginning of synthesizing an overwhelming volume of information into traceable and actionable data. Say goodbye to hours of grueling manual preparation in spreadsheets for those weekly meetings.

## ***Establishing a Single Source of Truth***

How many times have you had to look at different databases to find different kinds of information? You need to look up the customer in one system, log in to another system to get his address and order history, go to yet another system to enter new orders, and access yet another system that holds his warranty or service contract.

Of course, you can use all these legacy systems in conjunction with Service Cloud if you want to, but having a single source of truth solves a major business challenge for most businesses. You can quickly centralize your accounts, contacts, cases, entitlements for support, and interaction history or call logs in order to have a one-stop shop for all the information you need to effectively serve your customers.

Using Service Cloud, not only is all your customer's data updated and available, but this information is also accessible to other departments (only if you want it to be, of course, but sharing is caring). Breaking down silos in an organization is an effective tool to make sure that all sides of your business see the most up-to-date information about a customer. In this way, John in sales

knows not to reach out and try to sell to the customer who just yelled at you about his broken product.

## ***Collaborating with Your Coworkers***

Collaboration is an often overlooked aspect of successful business. People are so caught up in the goings-on of their own teams and departments that they forget that any other team or department exists. *Silos* (independent teams with no visibility into other teams) impede productivity in organizations because they contribute to unnecessary duplicate effort and a lack of internal visibility, and they don't foster an open, collaborative work environment. Collaborating more often and more effectively with the right people in your organization can help you resolve customer support issues much more quickly.

Think about it: Doesn't that new guy always ask for historical knowledge or company policy updates that you can easily answer? Sometimes you find what he needs through email threads; other times you just exchange the information at the water cooler or at your cubicle.

Service Cloud allows you to collaborate with your team more effectively, with a feature called Chatter. Unlike email threads, Chatter consists of publicly viewable posts with news feeds that display different pieces of useful information. You can also be rewarded or reward others for collaborating, thus driving this behavior and increasing internal awareness of business issues that are most important to your company or department.

Another feature in Service Cloud that facilitates collaboration is the concept of Case Teams, which allow

multiple agents to be added to a particular case so that a team can work together to service it. This is particularly useful in scenarios such as an agent taking a vacation, where the customers and cases he is responsible for aren't forgotten or left waiting.

## ***Getting the Data You Need When and Where You Need It***

Service Cloud provides the flexibility to make managing customer service inquiries easier for both agents and customers. Consumer bases are increasingly turning to technology to interact with brands and desire engagement with your brand more than ever before. You need to be able to engage with your customers on their terms.



Agents are happy when they have the necessary tools to be as successful as possible. This includes the ability to access customer information and provide world-class service even when they're not in the office. Empower your agents to succeed!

With Service Cloud, you can distribute your support centers throughout the world with chat-based support. Agents on the go can research answers to common problems and solve customer issues from their mobile devices. Your technicians out in the field can view customer addresses and report completed service on a tablet or smartphone. The opportunities are vast, and the increased speed and efficiency of service is quite noticeable.

# ***Building Brand Loyalists***

Every business has a base of loyal fans. These loyal fans, or *brand loyalists*, have the potential to become your evangelists — spreading the word about your product or service to their family and friends, and bringing more customers your way. Loyalists advocate on behalf of your brand (for free!) and stand up for you when times are tough. They also inspire others to love — or at least consider — your brand.

Every company wants and needs a loyal customer base. How to create brand loyalists can be a difficult question to answer, but there are some basic tools you can use with Service Cloud to help you get there.

## ***Reducing customer frustration***

Impeccable customer service is mandatory on the road to building customer loyalty. Do you ever get frustrated by interactive voice response (IVR) systems, those automated machines that interact with you via voice and keypad? How long do you hear the same loop of music while waiting on hold? Whether it's repeating information after call transfers, long hold times, or poorly designed IVR systems, listening to customer feedback and reducing customer frustration is critical in creating a brand that customers can rave about. Service Cloud can help by tracking customer feedback through surveys and adjusting how you engage with those customers accordingly.

## ***Giving your customers options***

Giving your customers the choice of how to access your customer service channels — be it through phone, a contact form on the web, chat, email, or social media — eliminates frustration. Some people prefer to wait on the

phone for the next available service representative, but others want to chat with a live agent for immediate service. Using Service Cloud, customers can choose the way they want to interact with you. So, if a customer doesn't want to wait on hold, she can talk to a Live Agent on your website. Leave the choice up to the customer. Service Cloud allows you to engage with your customers on their terms.

## ***Creating connections with your customers***

Creating connections that make an impact is a powerful tool in building brand loyalists. It can be as small as knowing the customer's name and "remembering" her story when she calls. It can also take the form of reaching out to thank a customer over social media when she mentions your company. Service Cloud allows your reps to perform these functions and take the appropriate steps to building a loyal customer base.

## ***Improving the quality of agent interactions***

Agents in high-volume call centers need to be as productive as possible. They have to be able to focus more on their jobs and less on logistics or searching through clunky, disparate databases. Service Cloud has out-of-the-box features that focus on streamlining your call center and optimizing agent productivity. Here are just a few examples:

- ✓ The Service Cloud Console allows an agent to view and act on all his cases and related information at a glance.
- ✓ Service Cloud's computer telephony integration (CTI) can automatically present a pop-up displaying the

customer's information to your agent before the agent picks up the phone.

- ✓ Case Teams allows for various agents to help service a particular case or customer.
- ✓ Centralized customer information allows for quick access to a great deal of information.
- ✓ Routing customer inquiries to agents based on skillset, language, or location saves immeasurable time in issue resolution.

These native Service Cloud components are timesaving tools that promote flexibility for your customer service organization and keep your employees and customers happier.

## ***Expediting the service process***

Using Service Cloud, you can expedite the entire service process. From the moment a customer inquiry is routed to an agent until the customer needs a renewal on her entitlement for support, Service Cloud aligns to and streamlines the process every step of the way.

Service Cloud offers various opportunities for automation:

- ✓ Using Salesforce assignment rules, you can automate how calls are routed to agents or queues based on a range of criteria.
- ✓ Case creation is also automated via email or web forms.
- ✓ Email templates streamline outbound communication.
- ✓ Escalation rules let you set up a structure that automates when and to whom a case is escalated.

- ✓ Approval processes allow you to determine the criteria for knowledge base article editing cycles.

Service Cloud leverages automation in different ways to orchestrate a system with moving parts, expediting your call center and making your agents better at what they do.



# Chapter 2

## Navigating Service Cloud

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### ***In This Chapter***

- ▶ Selecting the right Service Cloud edition
  - ▶ Accessing Salesforce.com
  - ▶ Navigating the Home page
  - ▶ Creating and editing records
  - ▶ Finding the Help and Setup menu
- 

First things first: Salesforce Service Cloud comes in several editions, and we start this chapter by helping you choose the right one for your business. Then we show you how to log in to Service Cloud, as well as offer a few administrator-level tips for password management. We cover the Home page and its components, and give you a brief introduction to creating and modifying records in Service Cloud. Finally, we cover where you can go for help.

## ***Choosing the Right Edition of Service Cloud for Your Business***

If you already use Sales Cloud (Salesforce's platform and product for sales organizations), Salesforce offers bundle pricing that integrates both the Sales Cloud and Service Cloud platforms. Otherwise, there are three Service Cloud editions that you can choose from. Regardless of

the edition you choose, the *interface* — the way it looks and feels — is the same, but each edition has slightly different functionality and pricing:

- ✓ **Professional:** The Professional Edition is great for smaller contact centers. You get the core features of Service Cloud, such as case management and tracking, the Service Cloud Console, asset tracking, Chatter, auto-assignment and escalation rules, web and email-case capture, mobile access, contract management, email template management, and reports and dashboards.



*Chatter* is a social collaboration tool that functions as a private social network for your business. It lets you stay in contact and collaborate with everyone you work with. For example, using Chatter you can post documents for an entire team to look at and even download.

- ✓ **Enterprise:** The Enterprise Edition is the most popular and is intended for larger companies. Features include everything that's available in the Professional Edition, as well as offline access, Force.com pages and Visualforce for custom development, integration via web services API, record types, and social media integration, as well as workflow and approval processes.
- ✓ **Unlimited:** The Unlimited Edition gives you access to 24/7 customer support; unlimited online help, training materials, and videos; increased storage; and much greater capacity for tailoring and customization. That means that if something goes awry at 4 a.m. on a Sunday, you can contact Salesforce.com agents with your questions. This edition is great for large

companies with complex business processes. The Unlimited Edition requires a devoted administrator to take advantage of all the functionality it offers.



Salesforce also offers a Developer Edition, which is a free Salesforce instance with limited licenses that has full functionality for administrators and developers who need to test configurations and code customizations.

The best part about Service Cloud is how easy it is to use. Depending on the way your business works, you can choose an edition that suits your needs. And, because you're in the cloud, you can simply add more licenses as your company scales or upgrade to another edition if you change your mind.

## ***Logging In to Service Cloud***

Because Service Cloud is entirely cloud-based, all you really need in order to access it is an Internet connection. (Well, you'll also need a username and a password, but we'll get to that.) You can log in from your office and then pick up where you left off in your hotel while traveling in Tokyo. Salesforce has many security measures in place to protect your identity and ensure that your company's sensitive data is not at risk.

### ***Open sesame: Setting up a password***

The first thing you have to do in order to set up your password is to have your administrator click a button on your user record that generates a Salesforce system

email with the subject line “Salesforce.com password confirmation.” This email provides you with your username and a temporary password. The email contains a link that you can click, and it will take you to a page where you can change your password.

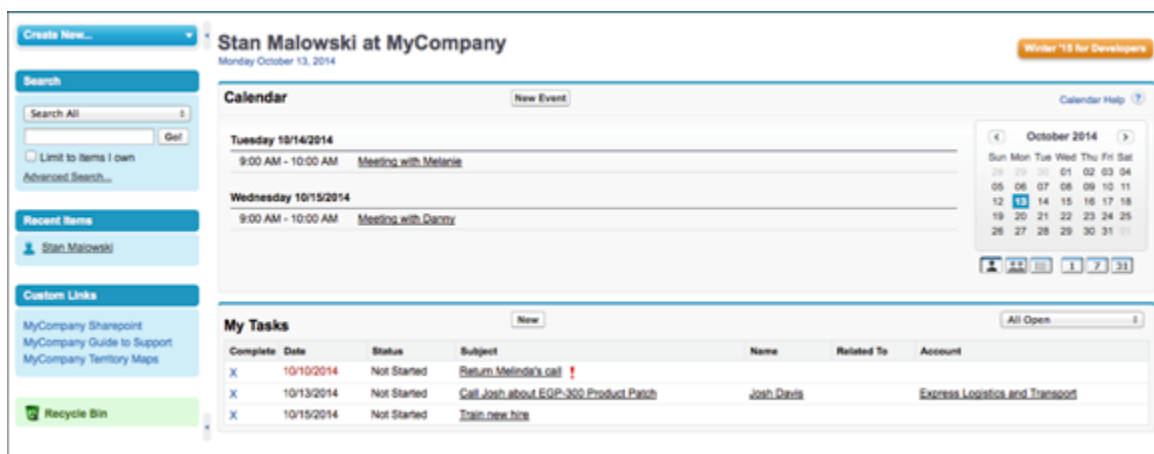
Open the email and then follow these steps:

- 1. Click the link that appears after Log In Automatically by Clicking.**

The Change Password page appears, welcoming you to Salesforce and prompting you to set a password for your account.

- 2. Fill in the required fields and click Save.**

The Home page (shown in [Figure 2-1](#)) appears. The Home page is the initial entry page you see after logging in to Salesforce. It has multiple components that are customizable based on your preferences and role in the organization.



**Figure 2-1:** The Salesforce Home page.

## ***I call do-over!: Resetting your password***

You're bound to need to reset your password someday. If you lost or forgot your password, you can click the

Forgot Your Password? link after failing an attempted log in. You'll need to enter your username and then you'll get an email with a password reset link; click that link, answer your security question, and reset your password.

If you want to change your password and you remember what the current one is, log in and follow these steps:

1. **Click the down arrow next to your name and then click Setup.**

You may not have access to this area if you aren't an administrator. If this is the case, contact your administrator and have him reset your password for you.

2. **From the sidebar, under My Settings, click the + (plus sign) to the right of the first drop-down, Personal.**

A drop-down list of personal information settings expands.



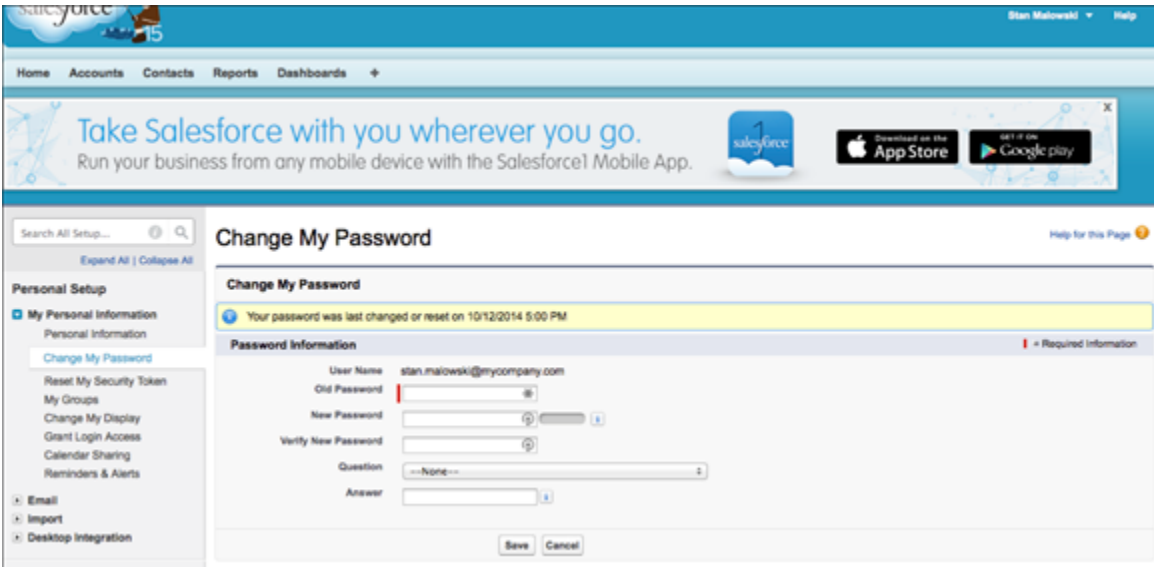
The *sidebar* is the vertical panel running down the left side of the screen. It contains quick links to recent items and other at-a-glance, useful information.

3. **From the expanded selection, click Change My Password.**

The Change My Password page (shown in [Figure 2-2](#)) appears.

4. **Enter the requested information in the appropriate fields and click Save.**

The main Personal Information page appears and your password is changed.



**Figure 2-2:** The Change My Password page.



Periodically change your password to protect your data. If your company's administrator chooses to have passwords expire automatically after specified periods, you'll be required to change your password periodically.

## ***Logging in and authenticating***

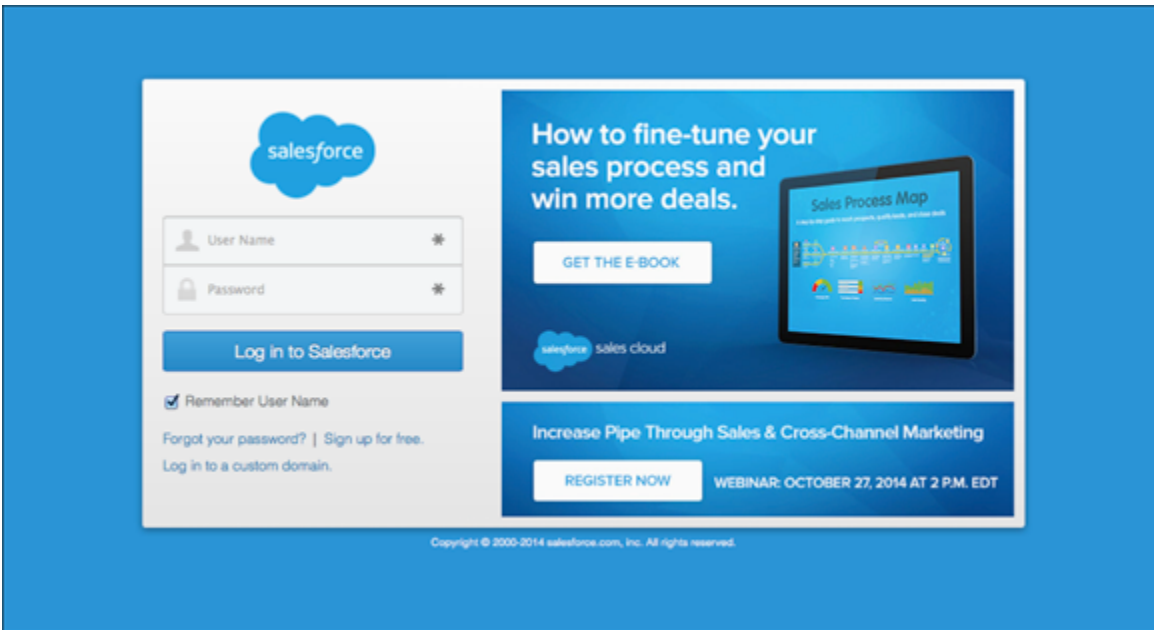
Logging in to Salesforce is very similar to logging in to any other software as a service (SaaS) application, such as your email service. To log in to Salesforce, open your web browser and follow these steps:

- 1. Type `http://login.salesforce.com` in the address bar and press Enter.**

The login page (shown in [Figure 2-3](#)) appears.

- 2. Enter your username and password.**
- 3. Click Log In to Salesforce.**

The Home page appears.



**Figure 2-3:** The Salesforce.com login page.

If you're logging in from a computer that Salesforce doesn't recognize, you may be prompted to enter a verification code and authenticate your computer. If so, Salesforce will send an automated email or text message to the email address or phone number associated with your username. The message contains a verification code that you can type where prompted in Salesforce. This way you authenticate your computer and Salesforce verifies your identity.

## ***Navigating the Home Page***

When you log in, the Home page is the first page you see. It's designed to have the most pertinent and readily available information to reduce the number of clicks it takes you to get to where you need to go. You can navigate to any tab or app at the top of the page. You can also click shortcuts in the sidebar, check your calendar, and manage your open tasks before starting your day.

A *tab* is a table of data that holds relevant records and represents a collection of information. Tabs appear at the top of any page in Salesforce. *Apps* (short for *applications*) are a collection of tabs that are logically grouped under an umbrella in which a particular team or role can work from and default to.

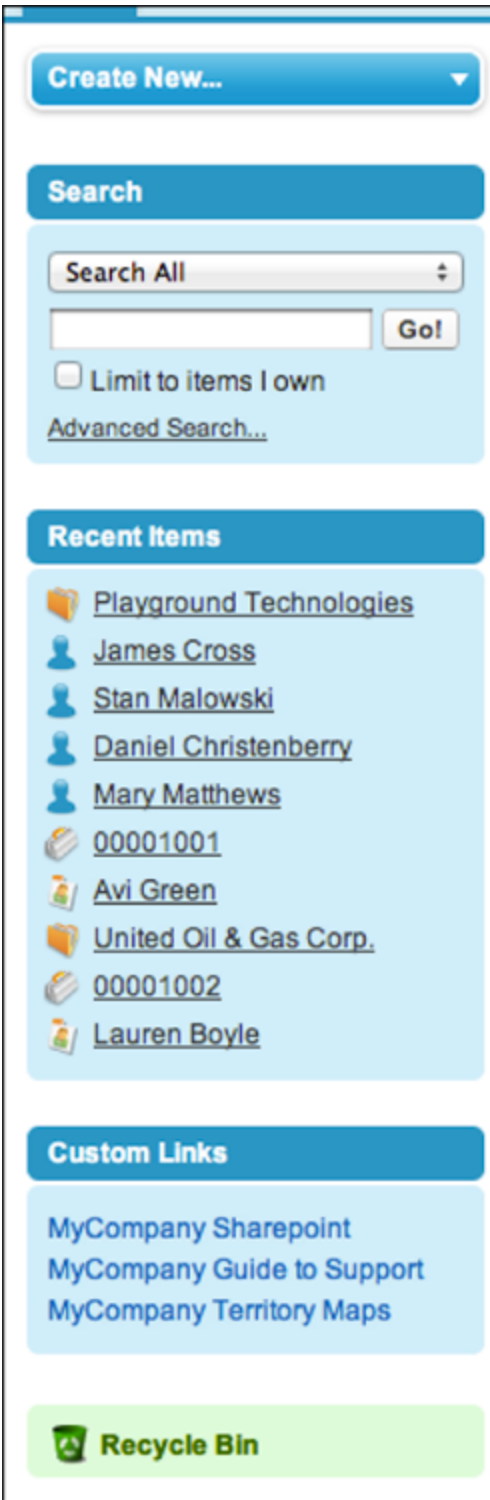
The look and feel of the Home page is very similar (if not identical) for all users, but the information contained within the Home page is specific to you. For example, your calendar will be different from your peers' calendars. Similarly, your open tasks probably differ from those of your colleagues.

Like most elements within Salesforce, your administrator can customize the Home page to show only the information that is relevant to you or your role within the organization. For example, your support reps probably don't need to see items for approval if that's not part of their job. Depending on how your Home page is customized, you may also see dashboards.

## ***Using the sidebar and custom links***

Let's start off on the left side of the page. The sidebar column, shown in [Figure 2-4](#), appears on almost all Salesforce pages. In this section, we look at the various features of the sidebar.





**Figure 2-4:** The sidebar column.



If your sidebar looks different or contains certain components that we don't cover here, your organization probably uses or develops third-party applications to enhance basic Salesforce functionality. For example, if your support agents use a softphone within Service Cloud, you may find that your organization supports computer telephony integration (CTI) and integrates a softphone third-party add-on.

### ***Creating new records***

Using the Create New drop-down on the Home page, you can quickly create new records and save yourself a bunch of clicks. Just click the drop-down and choose the type of record you want to create on the fly. On the individual tab Home page (the initial landing page you're taken to after clicking a tab), you see a Quick Create section in the sidebar. This section lets you create a new record pertaining to that tab, such as a new Account, with only having to enter a few fields, as shown in [Figure 2-5](#). Yes, it's that easy and it can save you loads of time in the long run.