

# ADMINISTER AND MAINTAIN SERVICE CLOUD (ADX261)



## OVERVIEW

Discover how to scale your organizational support needs and streamline business processes across your service teams with Service Cloud. In this 2-day instructor-led class, learn how to configure the Lightning Service Console application, implement support case management, enable Salesforce Lightning Knowledge, use Flow for Service. Create exceptional customer service experiences that drive customer satisfaction scores, optimize support agent productivity, and improve operational efficiency.

## WHO SHOULD TAKE THIS COURSE?

This class is designed for Salesforce Administrators who are responsible for configuring, managing, and maintaining Service Cloud. This is also a great class for anyone looking to earn their Service Cloud Consultant credential.

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

- Customize the Salesforce Lightning Service Console application to optimize support agent productivity.
- Implement support case management and automate support processes with queues, assignment rules, and escalation rules.
- Enable Salesforce Lightning Knowledge to manage the creation, publication, and maintenance of knowledge articles.
- Manage customer service-level agreements by setting up case Entitlements and Milestones.
- Identify Softphone Utility capabilities and functionality.
- Explain how Service Cloud Voice work.
- Recommend and administer Flow for Service solutions to address customer business requirements.

## PREREQUISITES AND PREWORK

Students should hold the Salesforce Administrator credential or possess equivalent knowledge, demonstrate a solid understanding of basic Salesforce features and functionality, and have at least six months of experience using Salesforce.

Please complete the following trailmix before attending our expert-led class: [Trailmix, Trailhead Academy](#)

**IMPORTANT** : If you use your personal computer and a configuration is described in the [Computer Setup Guide](#), you must complete it before attending the class.

## CERTIFICATION

ADX261 is recommended to prepare Salesforce Certified Service Cloud Consultant exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#). Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; if you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

### Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided



**DURATION**  
2 days

**DELIVERY FORMAT**  
- Classroom  
- Virtual

**LANGUAGE**  
Course in French /  
Materials in English

**USER INTERFACE**  
Lightning Experience

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## LESSONS & TOPICS

### Set up Case Management

- Case Management Process
- Incident Management
- Case Support Processes
- Tools for Automating Support
- Web-to-Case
- Email-to-Case
- Auto-Response Rules
- Create Case Queues and Assignment Rules
- Case Escalation and Case Management
- Entitlements and Service Contracts
- Entitlement Processes and Milestones
- Agent Collaboration with Chatter, Case Teams, and Slack

### Set Up Service Console

- Introduction to the Service Console
- Dynamic Forms, Capabilities, and Actions
- Building a Lightning Service Console
- Customizing Lightning Service Pages
- Adding Utilities to the Lightning Service Console
- The Macro Builder
- Call Routing
- Service Cloud Voice
- Call Center Metrics & KPIs to Measure Agent Performance

### Set Up Salesforce Knowledge

- Salesforce Knowledge Overview
- Knowledge-Centered Support (KCS)
- Lightning Knowledge Guided Setup
- Knowledge Page Layouts
- Access to Salesforce Knowledge
- Data Category Visibility
- Create and Manage Articles
- Manage Cases Using Articles
- Optimize with Einstein Knowledge

### Using Flow for Service

- Flow for Service Use Cases
- Flow Overview
- Create Flows and deploy them to Users