

**Salesforce Certified Service Cloud Consultant**

**Course Number:** SF-126
**Duration:** 5 days

**Overview**

This Salesforce® Certified Service Cloud Consultant training course teaches attendees how to leverage key customer service concepts within Salesforce and is preparation for the [Salesforce Certified Service Cloud Consultant exam](https://trailhead.salesforce.com/credentials/experiencecloudconsultant).

**Prerequisites**

Students should have taken Accelebrate's [Salesforce Administration and Configuration in Lightning Experience](file:////training/salesforce-administration-and-configuration) course or have equivalent experience with Salesforce administration and configuration, as demonstrated through successful completion of the [Salesforce.com Certified Administrator exam](https://trailhead.salesforce.com/credentials/experiencecloudconsultant).

**Materials**

All Salesforce Certified Service Cloud Consultant training students will receive comprehensive courseware.

**Software Needed on Each Student PC**

Each student will be given a practice learning environment to use during hands-on exercises during the class. The student will be able to use this learning environment indefinitely after the class without any additional fee.

**Objectives**

* Learn software development lifecycles
* Discover project management strategies
* Learn Salesforce Platform architecture and the model-view-controller design pattern
* Set typical customer service and call center goals
* Enhance system security
* Review the object model related to customer service automation
* Work with the Service Cloud Console, CTI, IVR, WFM, portals, integration, success metrics, analytics, and best practices

**Outline**

* Introduction
* Software Development Lifecycle/Project Management Strategies
	+ Deployment: Metadata API/Packages/Change Sets
* Salesforce Platform Architecture & Model, View, Controller
* Setting up a Practice Site
* Customer Service Goals/Concepts
	+ Call center types
	+ Call Deflection/Channels
	+ CTI/IVR/PBX
	+ SLA’s
	+ Business continuity
	+ Challenges
	+ Knowledge-Centered Support (KCS)
	+ ITIL
	+ Satisfaction Surveys
* Introduction to GenWatt
* Trust.salesforce.com
* System Security
	+ Users
	+ Licenses
	+ Profiles
	+ Field level security
	+ Permission sets
* Record Security
	+ Record ownership/full access
	+ Organization-wide defaults
	+ Role hierarchy & roles
	+ Sharing rules
	+ Manual sharing
	+ Account teams
	+ Case teams
	+ Queues
* Data Management/Data Quality
* Security & Sharing Knowledge Check
* Service Relationships
	+ Accounts
	+ Contacts & personal accounts
	+ Cases
	+ Solutions
	+ Assets
* Knowledge
	+ Creation, publishing, consumption, and feedback
	+ Adoption & maintenance
* Service Cloud Automation
	+ Case assignment rules
	+ Entitlements/SLA’s
	+ Business hours
	+ Escalation rules
* Content
* Chatter
* Chatter Questions & Answers
* Case Feed
* Service Cloud Console
* Social Listening
	+ Radian 6
	+ Salesforce for Facebook
* Email to Case
* Visual Workflow
* Customer Portals
	+ Self-service
	+ Service cloud portal
* Home Page Design
* Reports & Analytic Snapshots
* Dashboards
* Deployment: Metadata API/Packages/Change Sets
* Data Migration & Data Integration
	+ Cases
	+ Activities
	+ Solutions
	+ Knowledge
* Performance Optimization
	+ Divisions
	+ Custom Indexes
* Visual Force & Apex
* User Adoption
* Metrics & Key Performance Indicators (KPI)
* User Interface & Search Settings
* Conclusion