

**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