Accenture Salesforce Hackathon

Salesforce Solutions
for a sustainable business

Day Four - Service Cloud & Productivity Tool

09th May 2022

ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – QUIZ TIME

Day 3 - Quiz Time Solution:

01

Object, record, field:

An object is a database Table
A record is a row of of the Table, a single instance of an Object
A field is a characteristic of an Object , a place where you store a value, like a name or address

02

Standard Object relationship of an Account:

Object relationships are a special field type that connects two objects together.
The following standard field are in any to one relationship with the Account: Opportunity, Contact, Case

03

An App is:

A group of tabs that makes it easy for user to access a set of related features in the full Salesforce.com browser App

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TECH TRAINING LAB – QUIZ TIME

Day 3 - Quiz Time Solution:

04

A page layout is:

A page layout controls the fields, sections, related lists, buttons and quick action that appear when users view or edit a record. You can modify an object's default page layout or create a new one.

Lightning App Builder is:

Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place. The App Builder can be used to add, remove, reorder components on a record page to give user customized view for each object's record.

05

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HANDS – ON CHALLANGE

Hands-on Challenge

Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.
The MOBILE SRL asks you to meet the requirement of their Sales Agents.
The Sales Agents needs **to track a new information** when they register a new potential customer in Salesforce: **the environmental sustainability rank**. In particular, the Sale Agents select a value from the following: Low, Medium, High.
When the potential customer become a customer, the Sale Agents need to see the environmental sustainability rank on the Account object.
Furthermore, each month the Sale Agents call their Customer in order to collect information on the **Customer Satisfaction**:

- Satisfaction Rate: from 1 to 5
- Sales Experience: Very Bad, Bad, Good, Very Good

The Sale Agents wants to see all the Customer Satisfaction from the Account related list.

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TECH TRAINING LAB – HIGH LEVEL AGENDA – DAY 4

4 Service Cloud & Productivity Tool

RACHEL

01 [Service Cloud for Lightning Experience]

02 [Reports & Dashboard]

03 [Chatter for Lightning Exp]

04 [Knowledge Basics for Lightning Exp]

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TECH TRAINING LAB – LOW LEVEL AGENDA – DAY 4

Modules	Unit Details	Mins
Service Cloud for Lightning Experience	Begin Your Customer Service Journey	15 min
	Automate Case Management	30 min
	Create Digital Engagement on Multiple Channels	30 min
Reports & Dashboard	Introduction to Reports and Dashboards in Lightning Experience	10 min
	Create Reports with the Report Builder	25 min
	Format Reports	25 min
	Visualize Your Data with the Lightning Dashboard Builder	25 min
Chatter for Lightning Exp	Get Started with Chatter	10 min
	Create Posts, Polls, and Questions	15 min
	Customize Your Chatter Experience	15 min
Knowledge Basics for Lightning Exp	Get Started with Lightning Knowledge	10 min
	Prepare Your Salesforce Knowledge Base	10 min
	Set Up a Simple Knowledge Base	10 min

ACCENTURE SALESFORCE ACADEMY
LEARNING OBJECTIVE

After completing the Service Cloud & Productivity Tool trailmix, you'll be able to:

- Create Case
- Create Report & Dashboard
- Use Chatter

TRAILHEAD

[Service Cloud & Productivity Tool]()

In detail, you'll be able to:

- Describe what Service Cloud is.
- Describe key benefits of the Lightning Service Console
- Describe what Report and Dashboard are
- Respond to a post.
- Find and use in-app notifications

SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE

SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE

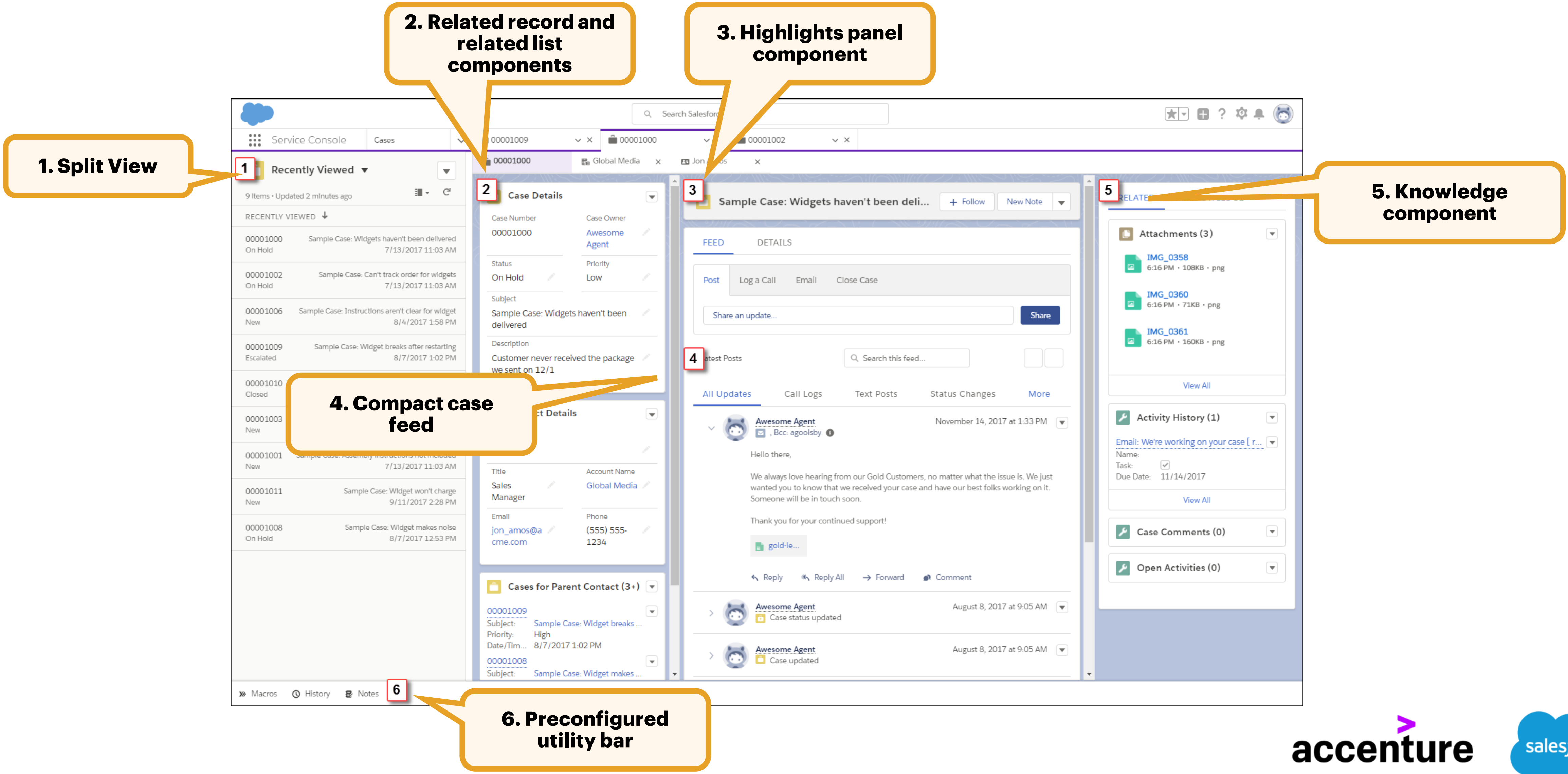
Service Cloud is an **easy-to-use customer service application** that can help you provide and track excellent service. It keeps your customers happy and your support team sane, whether your customers reach out to you by **email, phone, social media, or other channels** from **desktops, mobile devices, or apps**.

Service cloud main features are:

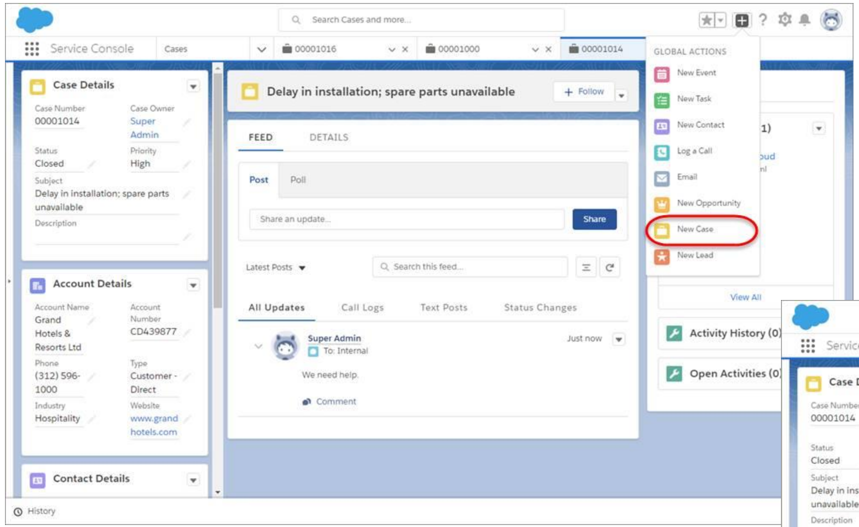
- **Service Console →** The console is a help desk that lets anyone on your service team see a personalized view of each customer and their case
- **Case Management →** All unifying info about a customer is stored on a case so that anyone on your service team can jump in to help.
- **Channels & Digital Engagement →** Whether the case arrived by email, phone call, web chat, social media, or text message, a support agent can quickly respond to it from the console.
- **Automatic Workflows →** When a case arrives, its information is automatically assessed and routed to the right people. Notifications keep your service team on track.
- **Knowledge Base →** Find, share, and store articles or answers related to cases to speed up service. Or, let customers find answers on their own from your self-service help centers.
- **Instant Metrics →** Information about cases is available in service metrics to gauge your business's response times, resolution times, and overall service health.
- **Mobile & Field Service Ready →** Since Service Cloud is part of the Salesforce platform, you can even see it all on your mobile phone or tablet out in the field.
- **Service for Everyone →** Salesforce is committed to providing accessible products for all individuals — including your service team members working with assistive technology, such as speech recognition software and screen readers.
- **Automatic Updates for the Future →** With each Salesforce release, you automatically get the latest technologies to position your support team for the future and the Fourth Industrial Revolution, including artificial intelligence (AI) for predictive service.

SERVICE CLOUD

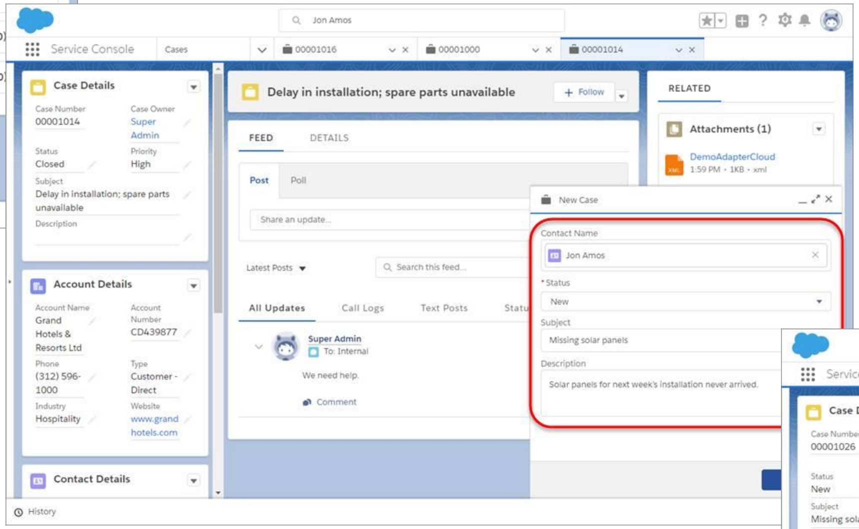
SERVICE CLOUD FOR LIGHTNING EXPERIENCE – BENEFITS OF CONSOLE



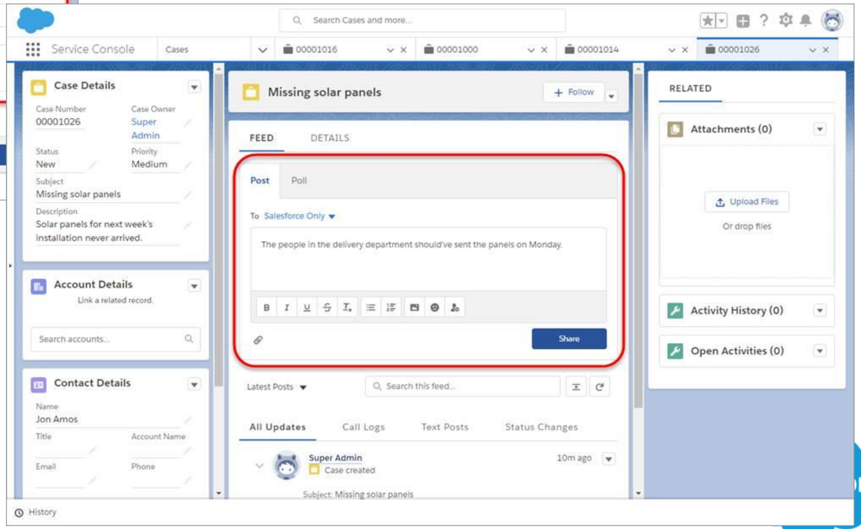
SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE – CREATE A CASE



Click the Add icon (Global Action), then New Case.



Fill mandatory fields in the box.



You can also add your own comment to the case's feed. Select Post, type what you want to say, then click Share.

SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE – GENERAL SETUP PROCESS <

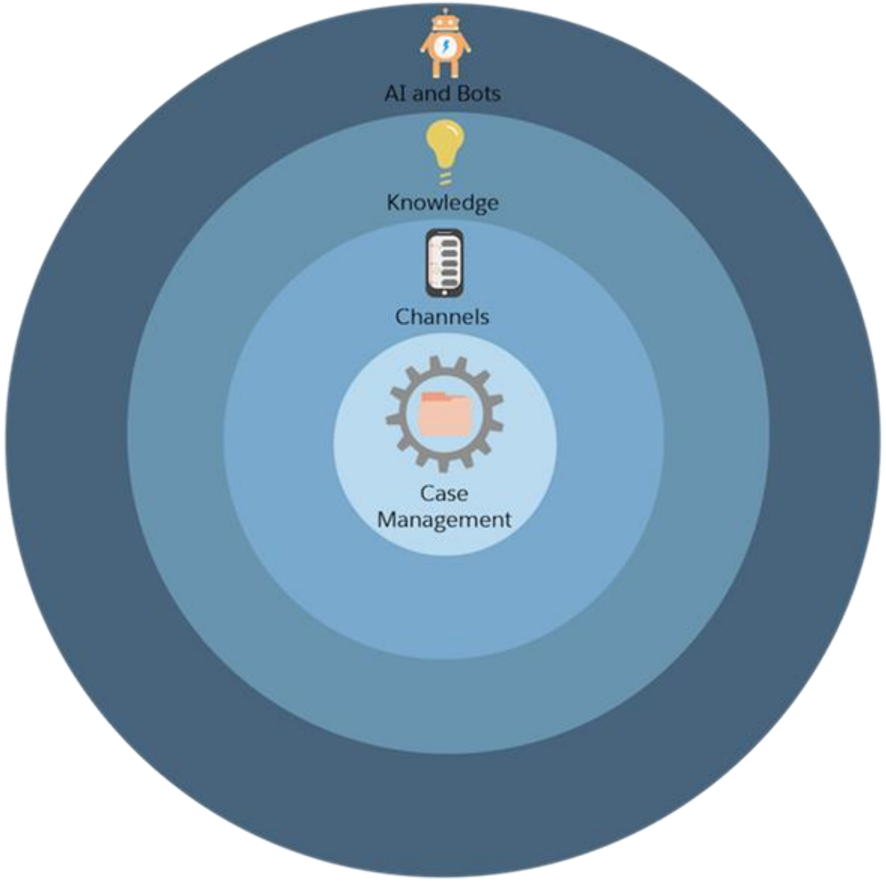
High-level view of general setup process:

Automate case management—First, route customer questions, comments, and feedback to the right people and places with as little work as possible. Analyze service metrics to spot trends and make better choices about service.

Add multiple channels—Once your case management system is in place, engage with customers on their favorite communication tools, such as phones, emails, websites, social media, and more. Sync all your channels to a console so that your team can respond to customers anywhere.

Capture knowledge—As customer engagement provides your team with insights, store all useful information in an easy-to-search Knowledge base so helpful articles are just a click away for support agents or customers.

Expand efficiencies with AI—Finally, include artificial intelligence and bots to streamline more tasks and predict service before it's needed.



Think of the setup process as circles of service expansion. Case management is the core. Then expand the core with channels, knowledge, AI and bots.

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SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE – CASE MANAGEMENT TOOLS <

Case management means organizing customer cases into one place and making sure they go to the right person, for the right answer, by the right time. Service Cloud does all that behind the scenes with automation tools. Service is easier, faster, and better with a little **auto-magic**.

Queues	Automatically prioritize your support team's workload by creating lists from which specific agents can jump in to solve certain types of cases.
Assignment Rules	Automatically assign incoming cases to specific agents so that the right people work on the right cases.
Escalation Rules	Automatically escalate cases to the right people when the cases aren't solved by a certain time.
Auto-Response Rules	Automatically send personalized email responses to customers based on each case's details.

SERVICE CLOUD
SERVICE CLOUD FOR LIGHTNING EXPERIENCE – DIGITAL ENGAGEMENT TOOLS <

Today's customers live in an instant, mobile, web-driven world and expect one-to-one service on their channel of choice anywhere, every time. If they can't reach you on their favorite channel, they might think less of your brand, think that you're behind the times, or think that you're putting them through a service circus.

Add Email Service

- **Email-to-Case** automatically converts emails sent to an address you specify to cases in the console.
- Email exchanges between customers and agents are tracked to see history and sentiment and lead to the quickest resolution.

Add Web Form Service

- **Web-to-Case** lets you add a submission form on your website so that customers can submit cases directly to the console for agents.
- Since you choose the case fields on the form, any workflows, assignments, and responses are automatically triggered.

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TECH TRAINING LAB

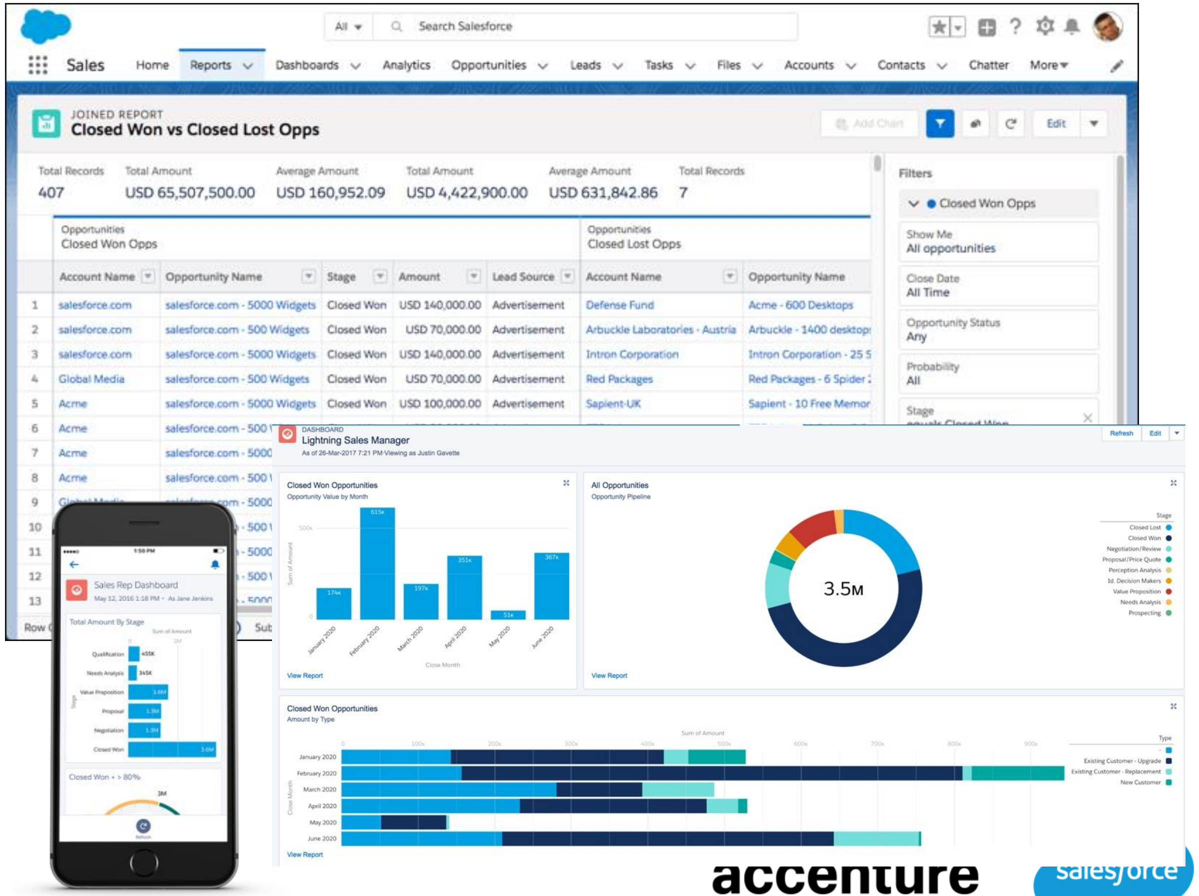
ACCENTURE SALESFORCE ACADEMY
REPORT & DASHBOARD

Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data

What is a **Report**? In its simplest form, a report is a list of records (like opportunities or accounts) that meet the criteria you define. But reports are much more than simple lists. To get the data you need, you can filter, group, and do math on records. You can even display them graphically in a chart!

What is a dashboard?

A dashboard is a visual display of key metrics and trends for records in your org. The relationship between a dashboard component and report is 1:1; for each dashboard component, there is a single source report. However, you can use the same report in multiple dashboard components on a single dashboard. You can display multiple dashboard components on a single dashboard page, creating a powerful visual display and a way to consume multiple reports that often have a common theme, like sales performance or customer support.



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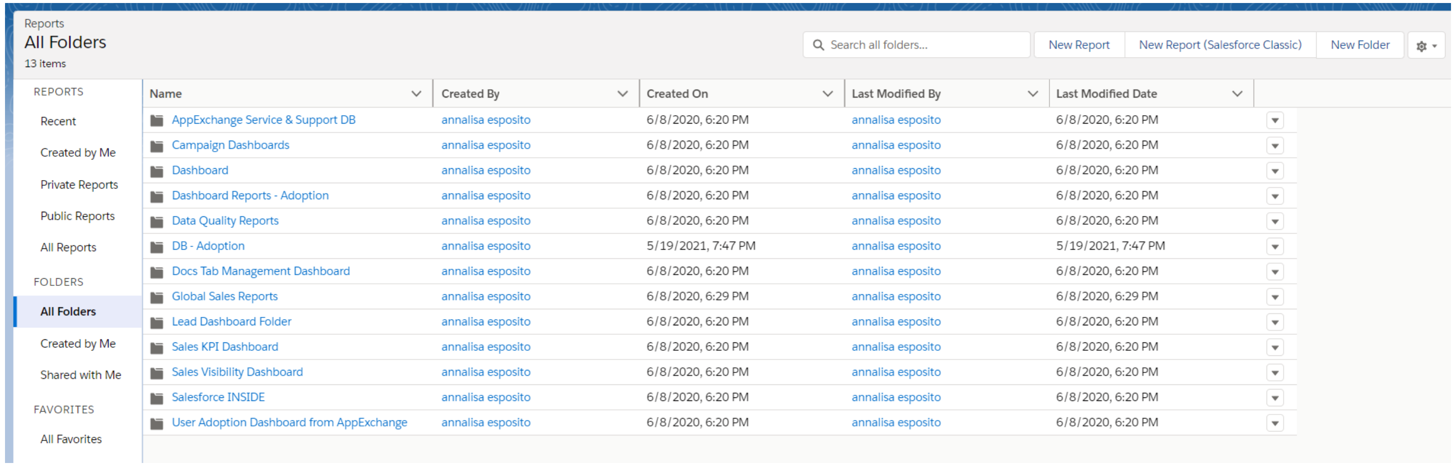
REPORT & DASHBOARD

Before start what you need to know?

Like reports, dashboards are stored in **folders**, which control who has access. If you have access to a folder, you can view its dashboards. However, to view the dashboard components, you need access to the underlying reports as well.



Name	Created By	Created On	Last Modified By	Last Modified Date
AppExchange Service & Support DB	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Campaign Dashboards	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Dashboard	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Dashboard Reports - Adoption	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Data Quality Reports	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
DB - Adoption	annalisa esposito	5/19/2021, 7:47 PM	annalisa esposito	5/19/2021, 7:47 PM
Docs Tab Management Dashboard	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Global Sales Reports	annalisa esposito	6/8/2020, 6:29 PM	annalisa esposito	6/8/2020, 6:29 PM
Lead Dashboard Folder	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Sales KPI Dashboard	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Sales Visibility Dashboard	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
Salesforce INSIDE	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM
User Adoption Dashboard from AppExchange	annalisa esposito	6/8/2020, 6:20 PM	annalisa esposito	6/8/2020, 6:20 PM

To create a report you need a **report type**, A report type is like a template that makes reporting easier. The report type determines which fields and records are available for use when creating a report. This is based on the relationships between a primary object and its related objects.

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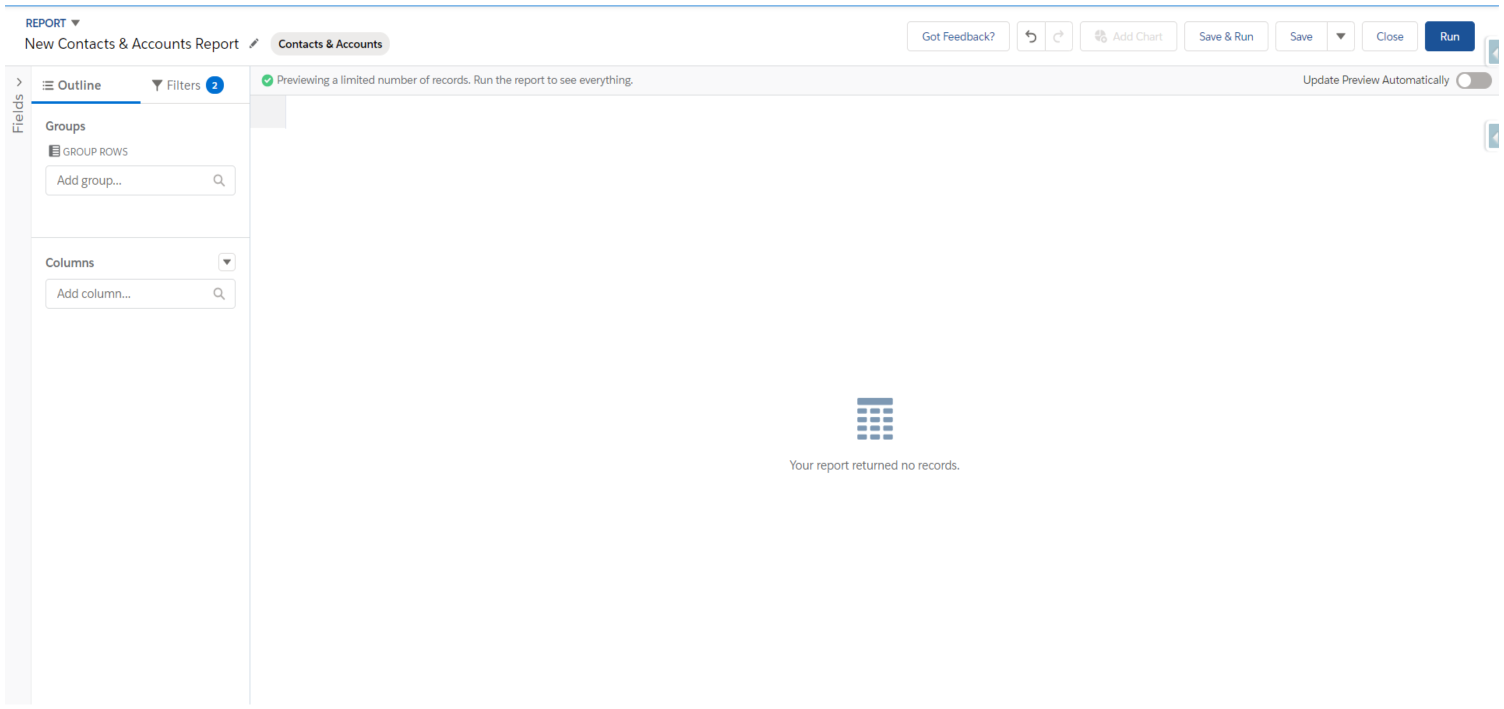
REPORT & DASHBOARD

Let's build together our first report! The **report builder** is a visual, drag-and-drop tool which you use to create reports and edit existing ones. The report builder is where you choose a report type, report format, and the fields that make up your report. To launch the report builder, click New Report.



Outline

- Column to display
- Group

Filters

- Standard Filter
- Field Filter
- Filter Logic
- Cross Filter
- Row Limit

Report Format

- Tabular
- Summary
- Matrix

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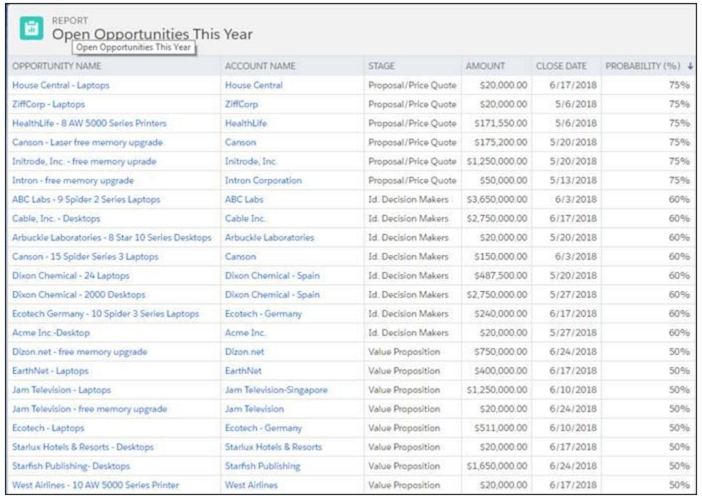
REPORT & DASHBOARD

Use Report Formats

Tabular Report

Tabular reports are the simplest and fastest way to look at your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row.



REPORT
Open Opportunities This Year

OPPORTUNITY NAME	ACCOUNT NAME	STAGE	AMOUNT	CLOSE DATE	PROBABILITY (%)
House Central - Laptops	House Central	Proposal/Price Quote	$20,000.00	6/17/2018	75%
ZiffCorp - Laptops	ZiffCorp	Proposal/Price Quote	$20,000.00	5/6/2018	75%
HealthLife - 8 AW 5000 Series Printers	HealthLife	Proposal/Price Quote	$171,550.00	5/6/2018	75%
Canson - Laser free memory upgrade	Canson	Proposal/Price Quote	$175,200.00	5/20/2018	75%
Initrode, Inc. - free memory uprade	Initrode, Inc.	Proposal/Price Quote	$1,250,000.00	5/20/2018	75%
Intron - free memory upgrade	Intron Corporation	Proposal/Price Quote	$50,000.00	5/13/2018	75%
ABC Labs - 9 Spider 2 Series Laptops	ABC Labs	Id. Decision Makers	$3,650,000.00	6/3/2018	60%
Cable, Inc. - Desktops	Cable Inc.	Id. Decision Makers	$2,750,000.00	6/17/2018	60%
Arbuckle Laboratories - 8 Star 10 Series Desktops	Arbuckle Laboratories	Id. Decision Makers	$20,000.00	5/20/2018	60%
Canson - 15 Spider Series 3 Laptops	Canson	Id. Decision Makers	$150,000.00	6/3/2018	60%
Dixon Chemical - 24 Laptops	Dixon Chemical - Spain	Id. Decision Makers	$487,500.00	5/20/2018	60%
Dixon Chemical - 2000 Desktops	Dixon Chemical - Spain	Id. Decision Makers	$2,750,000.00	5/27/2018	60%
Ecotech Germany - 10 Spider 3 Series Laptops	Ecotech - Germany	Id. Decision Makers	$240,000.00	6/17/2018	60%
Acme Inc.-Desktop	Acme Inc.	Id. Decision Makers	$20,000.00	5/27/2018	60%
Dizon.net - free memory upgrade	Dizon.net	Value Proposition	$750,000.00	6/24/2018	50%
EarthNet - Laptops	EarthNet	Value Proposition	$400,000.00	6/17/2018	50%
Jam Television - Laptops	Jam Television-Singapore	Value Proposition	$1,250,000.00	6/10/2018	50%
Jam Television - free memory upgrade	Jam Television	Value Proposition	$20,000.00	6/24/2018	50%
Ecotech - Laptops	Ecotech - Germany	Value Proposition	$511,000.00	6/10/2018	50%
Starlux Hotels & Resorts - Desktops	Starlux Hotels & Resorts	Value Proposition	$20,000.00	6/17/2018	50%
Starfish Publishing- Desktops	Starfish Publishing	Value Proposition	$1,650,000.00	6/24/2018	50%
West Airlines - 10 AW 5000 Series Printer	West Airlines	Value Proposition	$20,000.00	6/17/2018	50%

Summary Report

Summary reports are similar to tabular reports, but also allow you to group rows of data, view subtotals, and create charts. Summary reports give us many more options for organizing the data, and are great for use in dashboards.

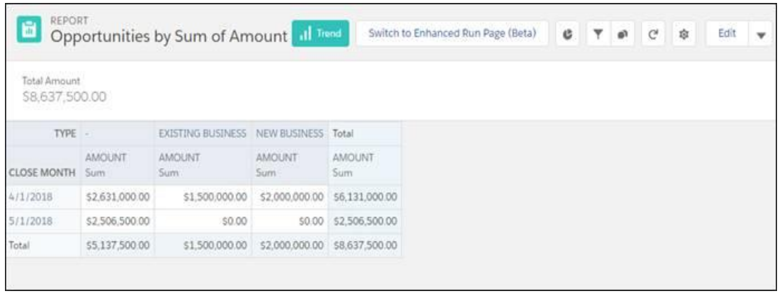
Total Records
4

PRIORITY	RECORD COUNT
High	3
Low	1
GRAND TOTAL	4

Filters
Show Me
All cases
Opened Date
All time
Open
equals True

Matrix Report

Matrix reports allow you to group records both by row and by column. These reports are the most time-consuming to set up, but they also provide the most detailed view of our data.



REPORT
Opportunities by Sum of Amount
Trend
Switch to Enhanced Run Page (Beta)
Edit

Total Amount
$8,637,500.00

TYPE	-	EXISTING BUSINESS	NEW BUSINESS	Total
CLOSE MONTH	AMOUNT Sum	AMOUNT Sum	AMOUNT Sum	AMOUNT Sum
4/1/2018	$2,631,000.00	$1,500,000.00	$2,000,000.00	$6,131,000.00
5/1/2018	$2,506,500.00	$0.00	$0.00	$2,506,500.00
Total	$5,137,500.00	$1,500,000.00	$2,000,000.00	$8,637,500.00

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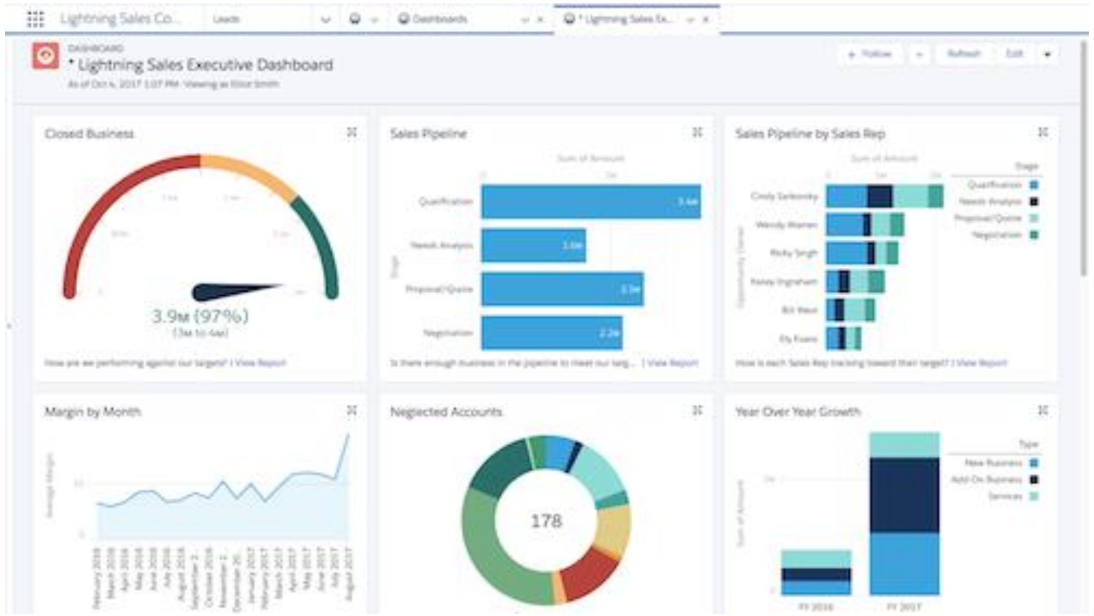
ACCENTURE SALESFORCE ACADEMY
REPORT & DASHBOARD

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.

Dashboards are built with source reports, filters, and components.

- Source reports are reports that provide data for components. report. Different comEach component has one source ponents can have different source reports. The fields available for dashboard filters are the fields available in the objects that source reports are based on.
- Filters let dashboard readers scope the data they see in the dashboard to a particular view.
- Components are the visual “blocks” of a dashboard. Each component is either a chart, gauge, metric, or table.



With **Dynamic Dashboards** each user sees the data they have access to without needing to create separate dashboards for each user. This means a single powerful dashboard can be used for multiple users in your company, because the logged-in user viewing the dashboard sees the data they should see, based on their security and sharing settings.

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TECH TRAINING LAB

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TECH TRAINING LAB

Question:

What you think Chatter is?

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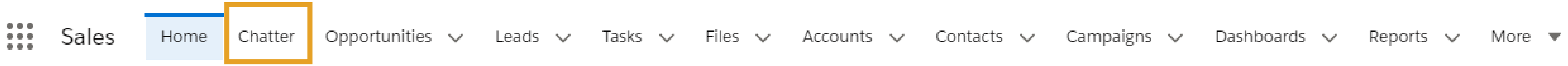
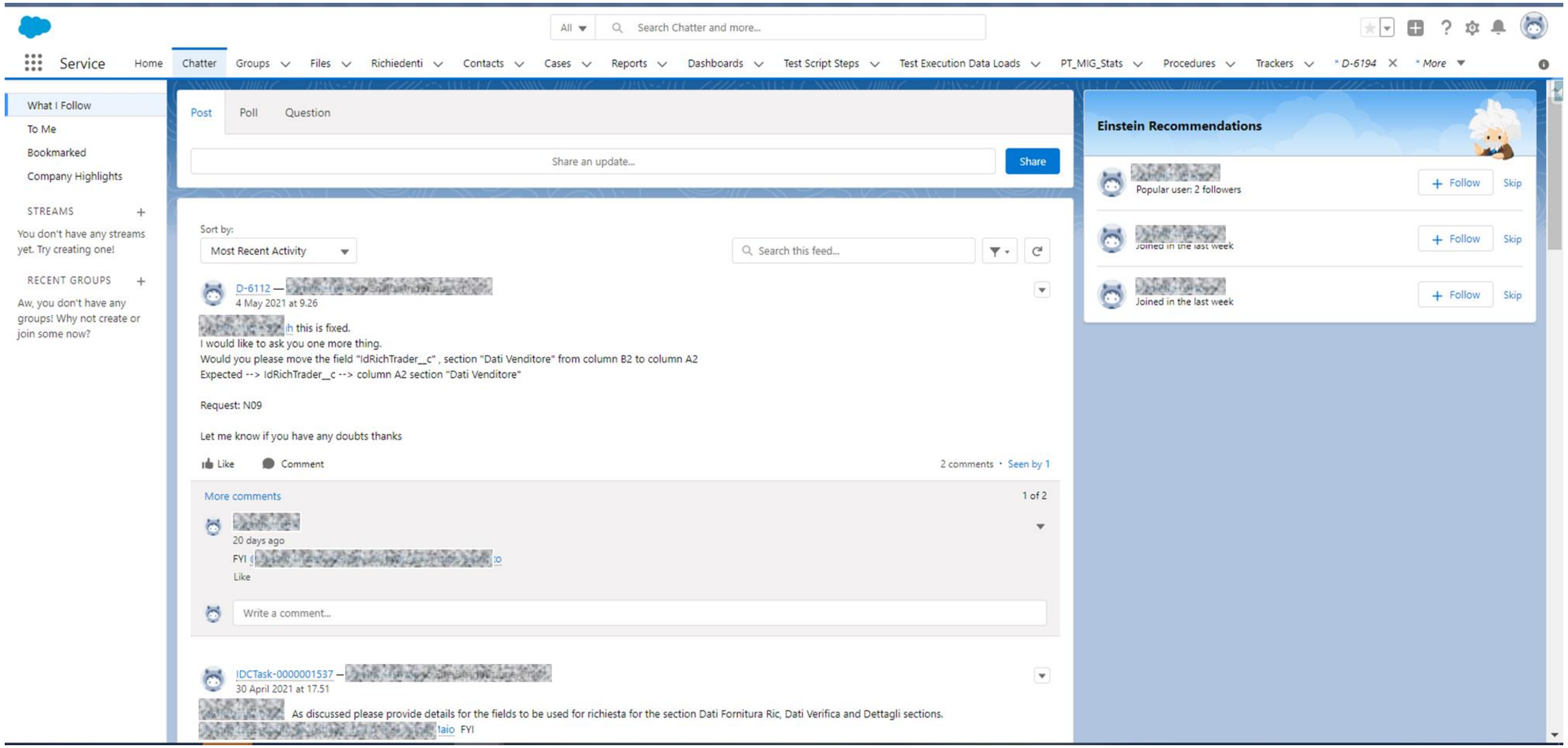
CHATTER



Chatter is the river of your Salesforce organization (org). So, when you have something to say, #TakeItToChatter—the best platform for collaboration anywhere. Discuss business with colleagues, experts, and customers; preserve those discussions; and revisit them whenever you like. Stay focused on the things you want to get done.



Tab Chatter

- What I Follow
- To Me
- Bookmarked
- Company Highlights
- My Drafts

Streams

Recent Group

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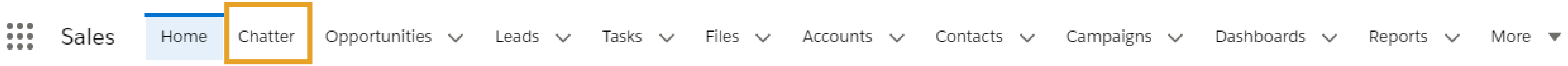
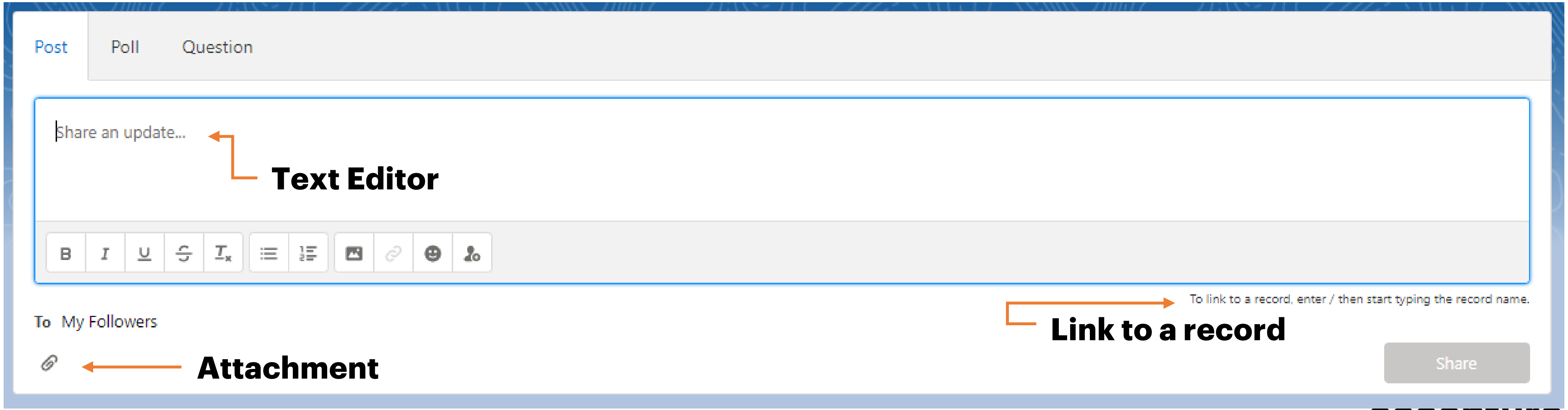
CHATTER



Chatter Publisher

Probably the most useful feature of Chatter is the publisher. Use it to add content to any kind of Chatter feed. You can post content, upload files, create polls, and ask questions. Use the Chatter publisher on the Chatter tab, on a profile, on a Salesforce record, and within groups

Post



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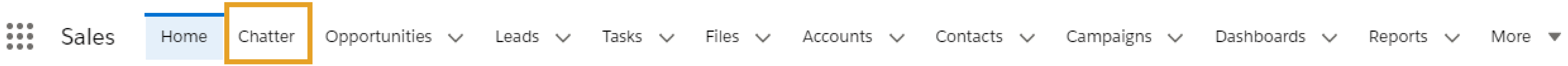
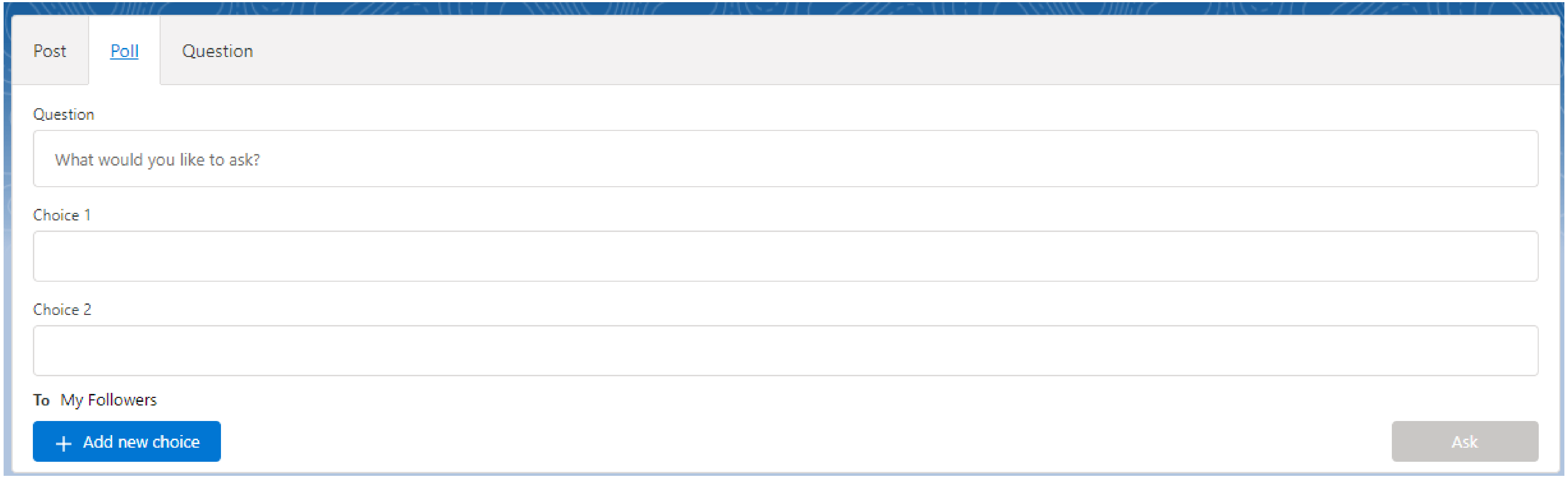
CHATTER



Poll



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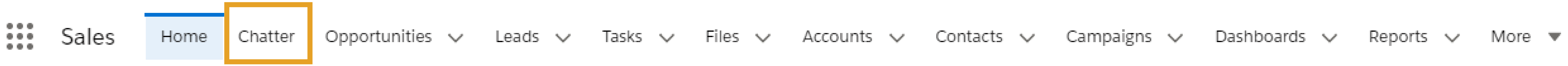
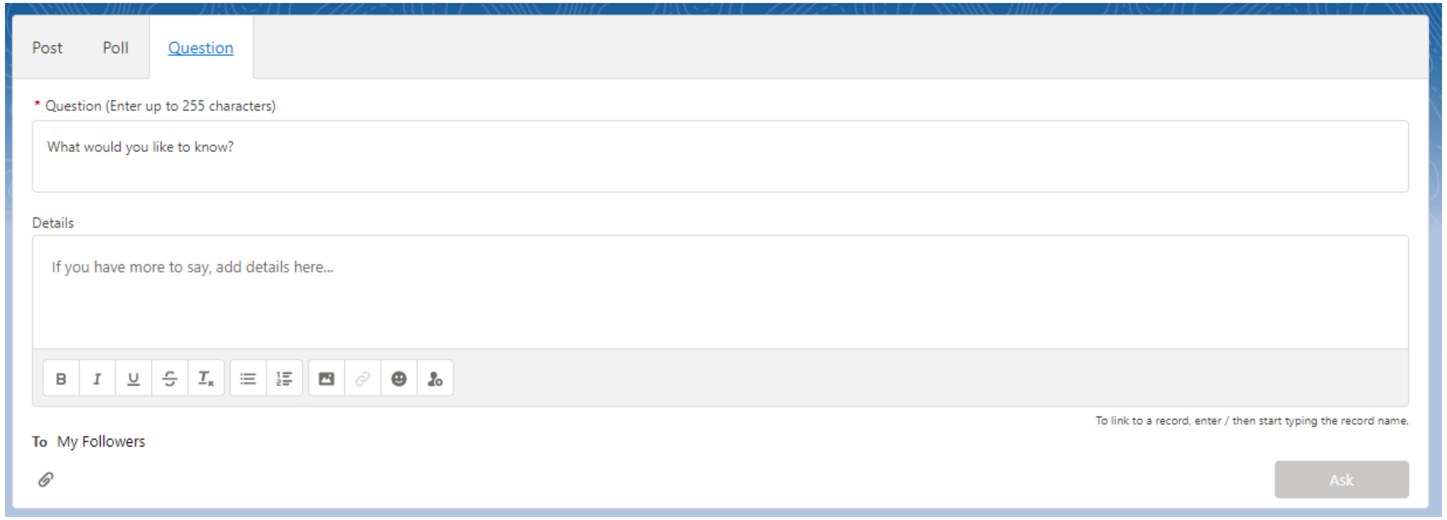
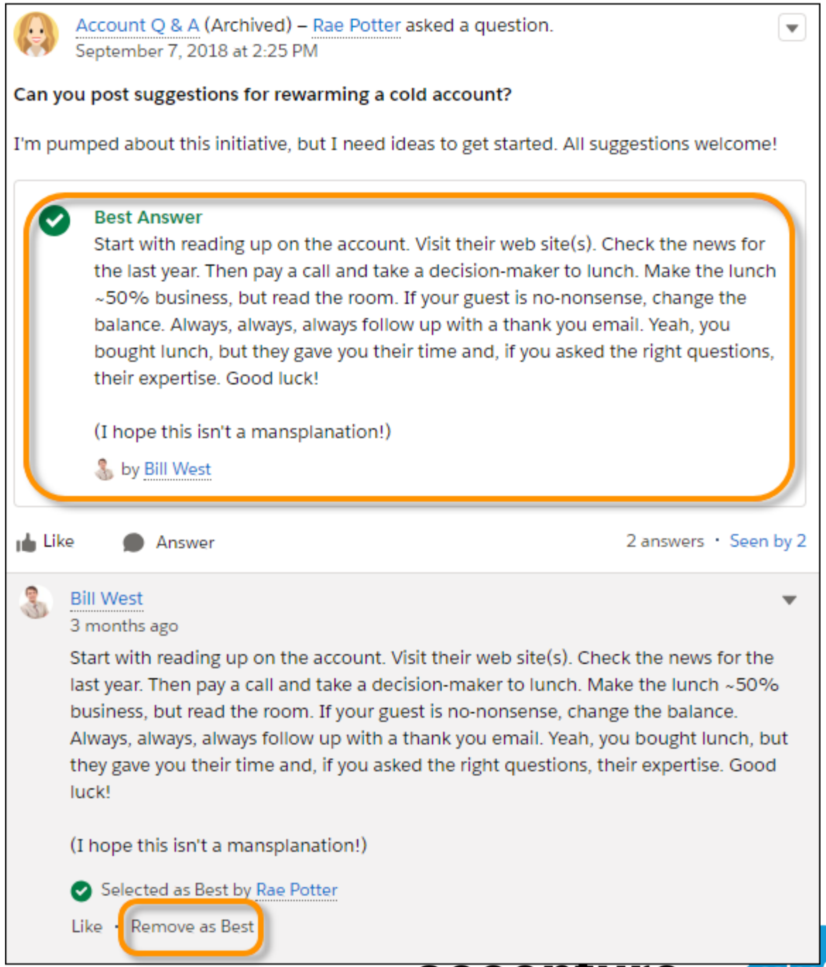
CHATTER



Question



Best Answer



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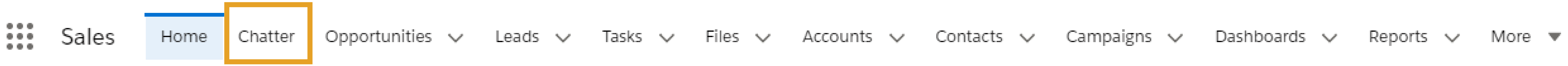
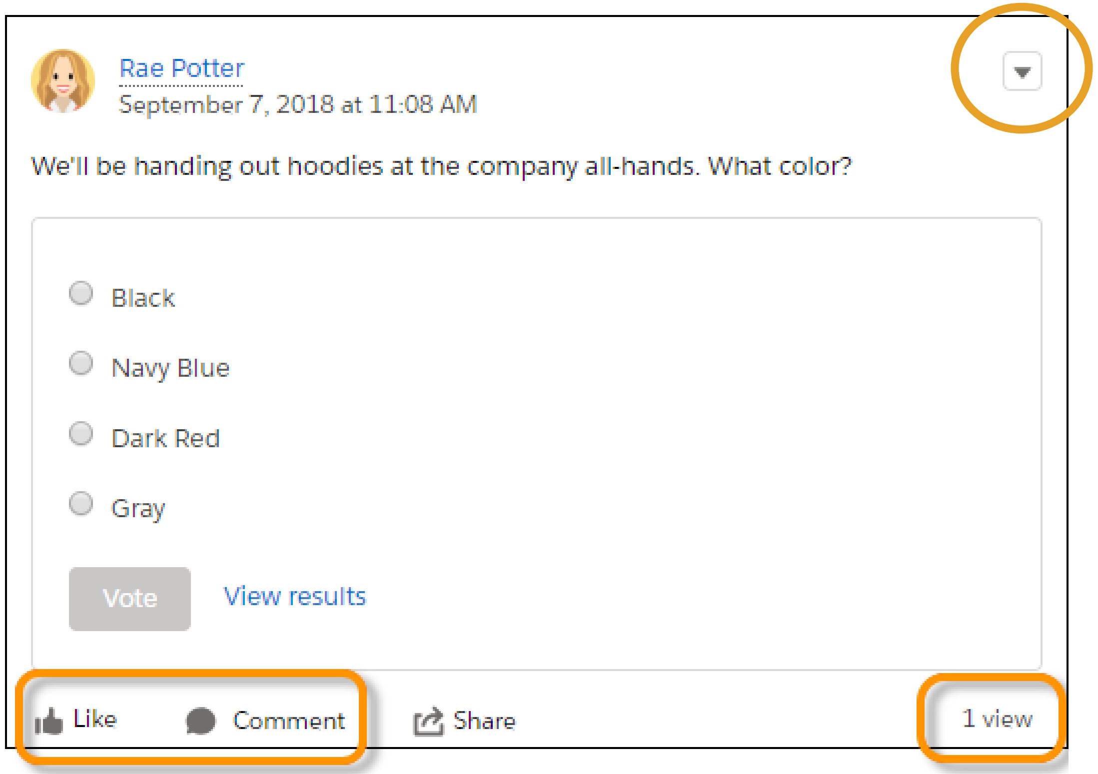
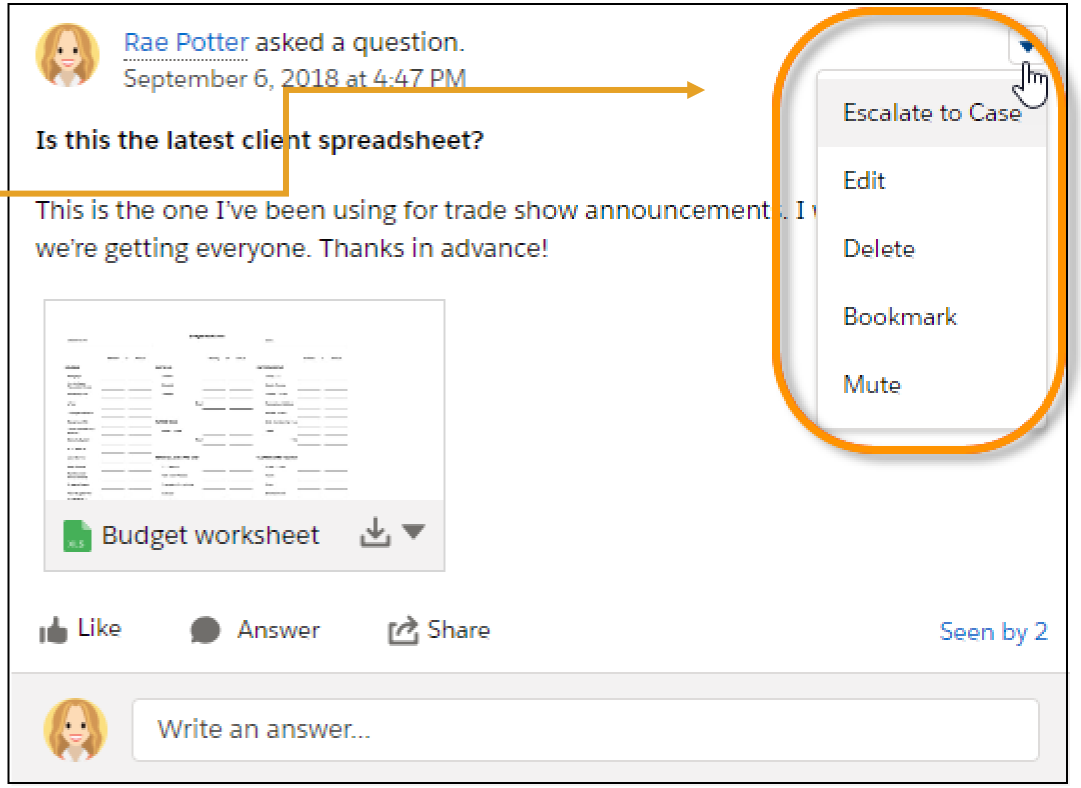
CHATTER

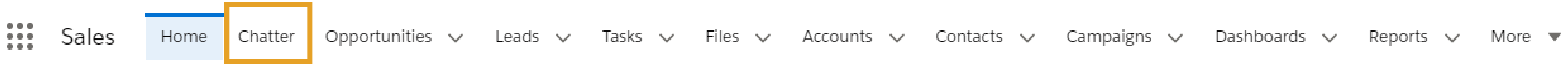


Action on a post

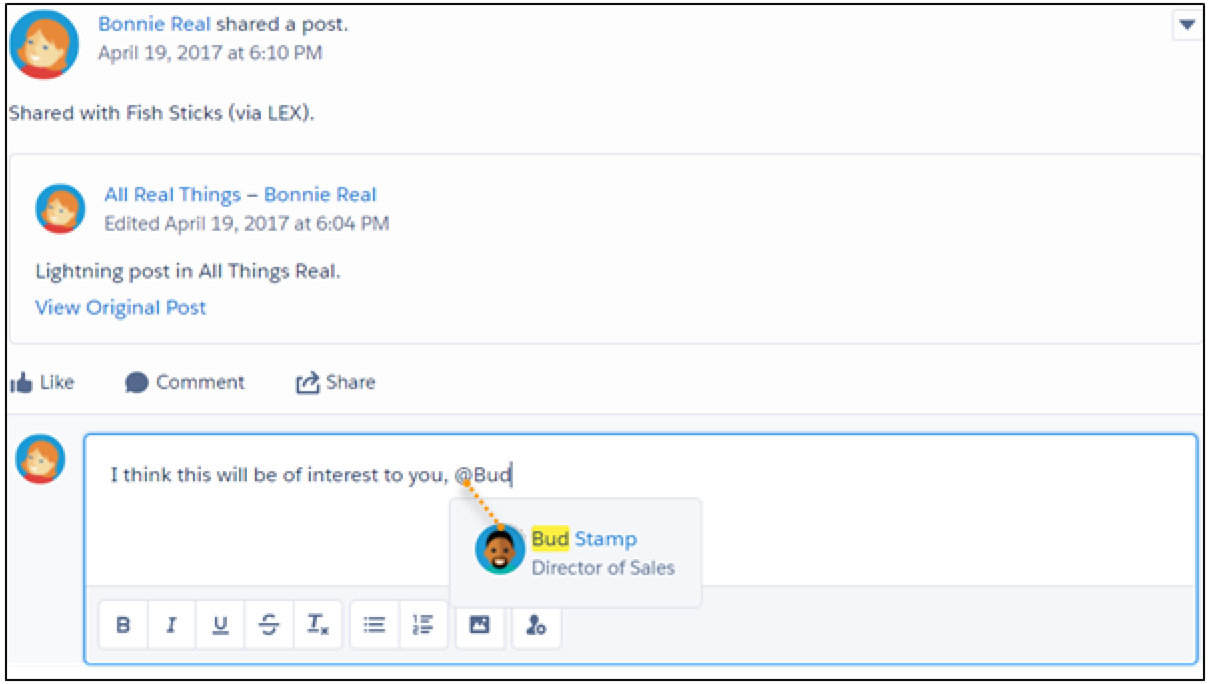




ACCENTURE SALESFORCE ACADEMY
CHATTER



Mention



To mention someone, enter the @ symbol and start entering their name. A list of suggested matches opens, and you choose a name from the list. You can also mention groups. Group mentions appear in the group's feed.

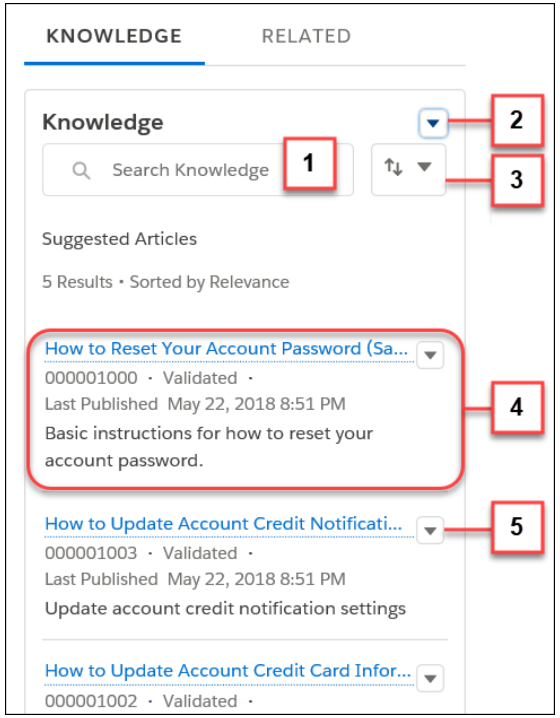
You can link to records in your posts using a similar mechanism. Instead of the @ symbol, enter a forward slash (/) and start typing the record name.

PRODUCTIVITY TOOLS
KNOWLEDGE BASICS FOR LIGHTNING EXPERIENCE

Knowledge is power

If basic information is easy to find, agents are free to spend more time helping customers with new problems. As a result, those customers are happier, too.

With a knowledge base, agents don't have to research every question from scratch, every time it's asked. Instead, the first time a question is asked, an agent records the answer in an article. The next time a customer asks the same question, any other agent can find the article in the knowledge base and provide a ready answer. Even better? Lightning Knowledge often suggests the article most relevant to a case so agents don't even need to search for it.



1. Search for articles — Type here to find articles in your knowledge base. For example, type password to find articles about resetting a user password. When you start typing in the search field, a menu pops up. Use it to view recent searches or create an advanced search with filters such as language or publication status.

2. Create an article — If an answer isn't in your knowledge base, create an article to add it.

3. Sort your search results — Click to sort your results alphabetically from A to Z or by publication date. Suggested articles are already sorted by relevance.

4. View details about each article — See the article's title, summary, and properties. In this case, the article is titled How to Reset Your Account Password.

5. Work with the article — Click this menu to interact with the article. Depending on the article's permissions, you can do a lot. You can edit, publish, archive, attach, detach, follow, or insert the article into an email.

PRODUCTIVITY TOOLS
KNOWLEDGE BASICS FOR LIGHTNING EXPERIENCE

Three main steps for a successful knowledge base:

- **Gather information to include in the knowledge base.**
- **Organize the information.**
- **Determine user access.**

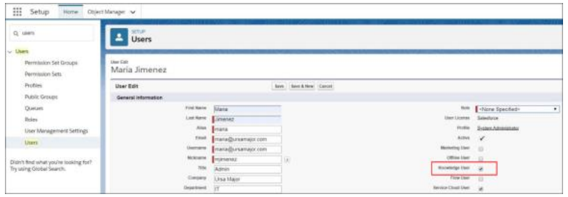
User	Description	Permissions Needed
Readers only	Relatively new to the company these agents aren't authorized to create articles yet. They use existing articles to answer questions and attach articles to cases.	Read article action.
Contributors	Advanced Knowledge users. They create, edit, and publish articles.	Manage Article permission and Read, Create, Edit, and Publish article actions.
Knowledge admin	Knowledge admins know when to retire or delete articles.	Manage Article permission and Read, Create, Edit, Archive, Publish, and Delete article actions

PRODUCTIVITY TOOLS
KNOWLEDGE BASICS FOR LIGHTNING EXPERIENCE

Set Up a Simple Knowledge Base

Identify and assign Knowledge User licenses

Once Knowledge is up and running, many people will write or edit articles, from agents and managers to subject matter experts and product evangelists. When that happens, each of them needs a license.



Enable Knowledge

1. From the Setup menu, choose **Setup**.
2. In the Quick Find box, enter Knowledge Settings and select **Knowledge Settings.**
3. Select **Enable Lightning Knowledge.**

Go with the Flow

Use the Knowledge Setup Flow to automatically enable Knowledge, assign licenses to article authors, and set up data groups and categories.

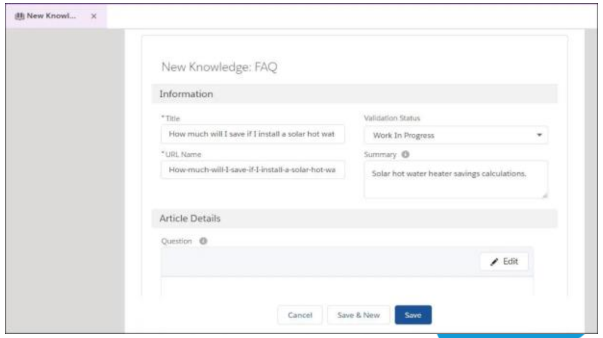
Create Articles

Enter the article title

Knowledge generates a URL based on the article

Choose a Validation Status

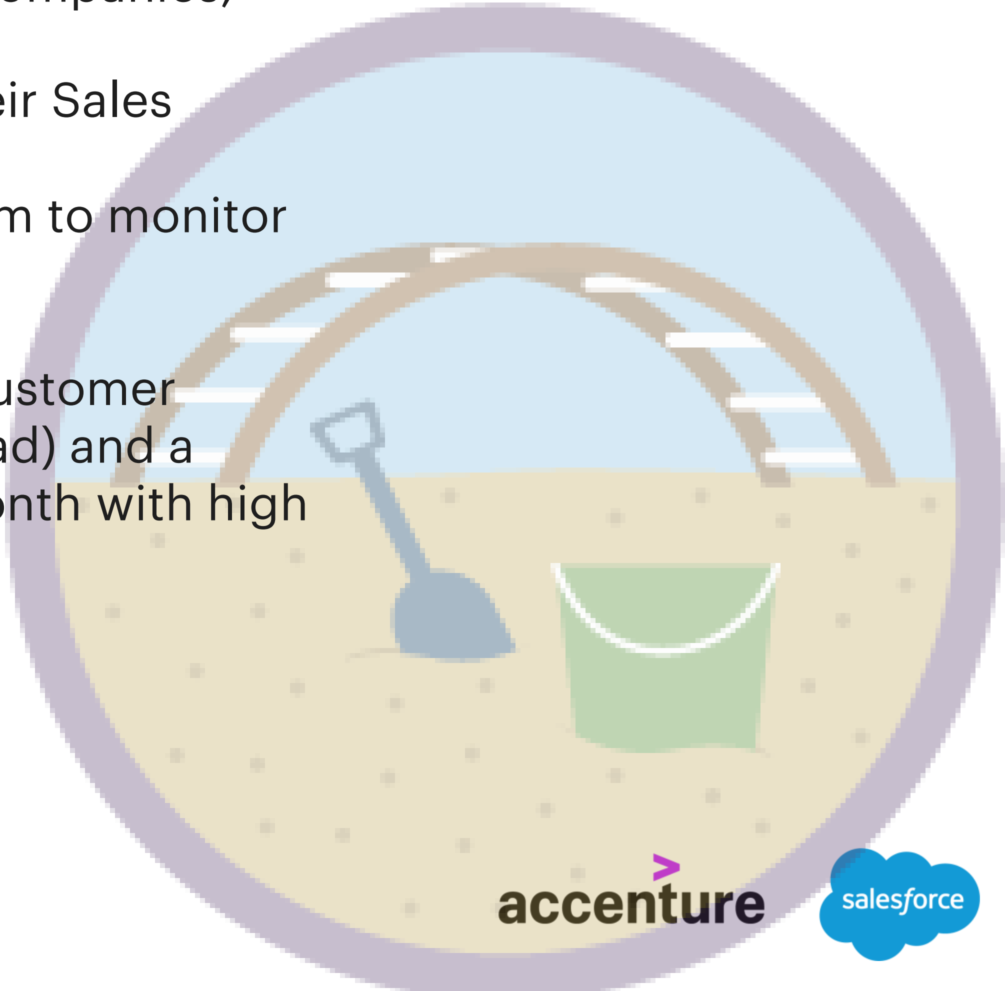
Enter a summary. The summary appears in the search results



ACCENTURE SALESFORCE ACADEMY
HANDS – ON CHALLANGE

Your Customer is a firm that sells mobile phones to big companies, the MOBILE SRL.
The MOBILE SRL asks you to meet the requirement of their Sales Agents.
A Sales Agent ask you to create a dashboard that help him to monitor the “Customer Satisfaction”.

More in depth, they want to see a report counting the Customer Sactisfaction group by month with low rank (very bad, bad) and a report counting the Customer Sactisfaction group by month with high rank (very good, good)



ACCENTURE SALESFORCE ACADEMY
TECH TRAINING LAB – QUIZ TIME

And now is your time!

Test your knowledge, instructions below

https://traininggarage-developer-edition.eu40.force.com/QuizTime/s/

Insert your Name, Surname and the code: TV_03

accenture salesforce

Thank You