Session 5 Homework

Trailhead moduls:

- Service Cloud for Lightning Experience: [Service Cloud for Lightning Experience]
- Set Up the Service Console: [Set Up the Service Console]
- Create a Process for Managing Support Cases: [Create a Process for Managing Support Cases]
- Set Up Case Escalation and Entitlements: [Set Up Case Escalation and Entitlements]

Additional Exercises (after completing the above moduls and if you are in the mood ☺)

Use a new playgorund for these exercises!

Discover the Service Console

Switch to the Service console and create a few new cases. Which fields are required? Can you reach the case from the account? From the contact? Add the related list to the layout Account and Contact layout!

Personalize the Service console

Modify the Service console settings so that the contacts always appear as the subtab of the Account.

Customize the utility bar to have the Phone, Notes and History tabs.

Auto-response and assignment rule

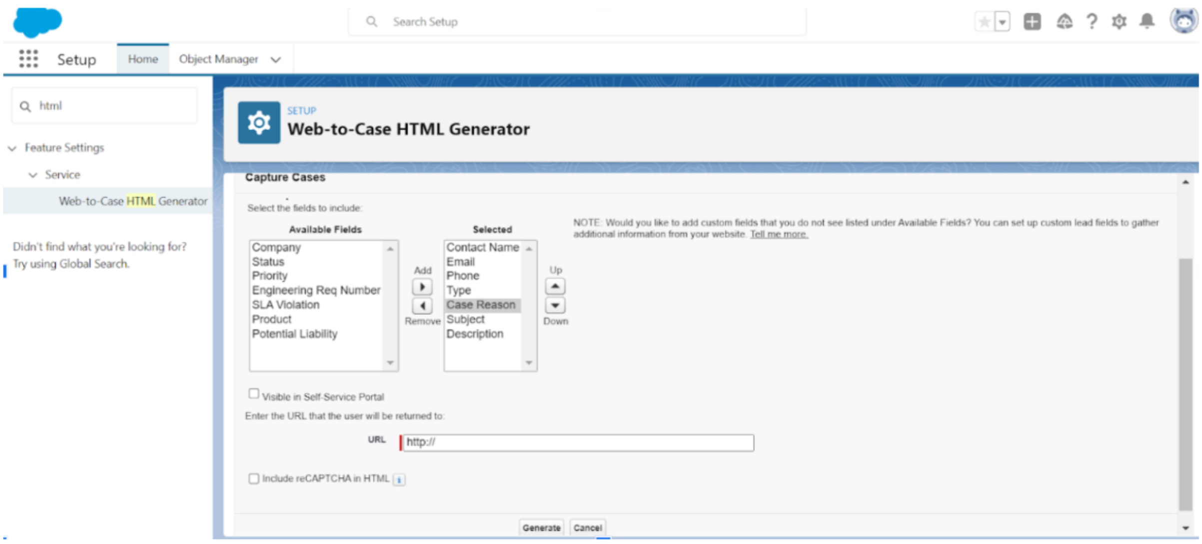
The company you are working for sells office assets and provides IT services to companies and individuals. It has a wide, stable partner basis and a partner support agent group is about to be set up. The companies can contact the service desk via an email in case there is any problem with the delivery/performance.

Create a Queue (Partner support) and an assignment rule: a case from every client who is a kind of partner (check Account - Type field) should go to this queue.

Notify the customers after having their case submitted: when the case reason is Performance or Breakdown, send an email to the customer with the case number and the name of the case owner.

Web-to-Case form

A form should be implemented into the website of the company so that the customers could contact the support faster and by providing more specific information. In order to do so, create and test a web to case form: Go to the web to case HTML editor. Set up as below:



Generate the HTML, copy the whole text and paste it to a notepad.

Save the notepad file in the following format: webform.html Open the webform and create a new case by using it. Check if it's really been created!

The customers of the company should be able to contact the support via email. How can you set it up by not using the service setup? What are the requirements? What kind of options do you have? You can use your personal email address to set up this service.

[Watch this video for a hint.]