Introduction to Salesforce for Service (SPCS-101)

Course ID #: 6510-101-CS-W

Hours: 5

Course Content

Course Description:

This class is delivered by a live instructor and is specifically designed to teach customer service and call center personnel the basics of Salesforce. The instructor will focus on the key features a call center employee can use to immediately become effective with Salesforce.

A student in this class will learn how to work with accounts, contacts, cases, solutions and activities. In addition, the instructor will show students how to how to use and create list views and reports to effectively filter information.

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

Target Student:

Customer service or call center personnel with little or no experience with Salesforce or those wanting a refresher on how to effectively manage leads and cases within Salesforce.

Topics:

- Introductions / Login to Training Orgs
- Overview of Salesforce for Service
- Working with Accounts
- Working with Contacts
- Working with Cases
- Working with Solutions
- Creating List Views & Reports
- Question & Answer