

Introduction to Salesforce.com for Service

Course Overview

This course 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.

This is a 1-day class

Who Should Attend

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.

Course Outline

- 1 **Introductions/ Login to Training Orgs**
- 2 **Overview of Salesforce for Service**
- 3 **Working with Accounts**
- 4 **Working with Contacts**
- 5 **Working with Cases**
- 6 **Working with Solutions**
- 7 **Creating List Views & Reports**