

# **SERVICE CLOUD**

Personalize service experience for your customers with digital engagement and, streamline your customer support operations.



www.infoglen.com

## SERVICE CLOUD QUICKSTART PACKAGE

Service Cloud is a platform for customer service and support, allowing you to save time by automating service processes, streamlining workflows, & support agents with AI-powered predictions, recommendations & case routing.



#### PREREQUISITES

- Org login access
- Install email-to-case agent
- Business overview and configuration understandings
- Around 8 hours of meeting time for Salesforce resources with your key business stakeholders

Two Weeks Project Duration Components	
<b>Discovery &amp; Solution Designing</b>	Requirement gathering and comprehensive solution design
Implementation	Features to help you start your service cloud flow
User Acceptance Testing	Functionalities approval
Deployment	Deploying functionalities to the production environment
Training & Documentation	One complimentary remote training session with documentation
Post Deployment Support	Post go-live support
What's Included?	
Setup security (Profiles, Roles and Sharing Rules) and Service Cloud user license assignments	
Up to 5 case record types & 5 page layouts with 5 case list views	
Configure and customize accounts, contacts, and cases with limited custom fields (10) and validation rules (5)	
Configure 1 custom object and associate it with case	
Setup service console - enable chatter, comments & configure the lightning page	
3 case queues and case routing/assignment rules with 3 case escalation and auto-response rules	
6 email templates with email notifications to the owner on case assignment & closure	
3 Standardized quick actions (Case closed, Spam case closure, & Update case)	
Set up web-to-case and email-to-case (Configuration only)	
Advisory/guidance for data migration, omni-channel, & knowledge, and 1 MACROs (Case Closure Macro)	
Custom Service Cloud 5 reports & dashboards	

### **ADDITIONAL ITEMS**



Integrations with 3rd Party Systems



Custom Code (Automation using Lightning Components, More Apex Triggers)



Einstein Chat Bot Implementation

Case Aging using Infoglen Pulse App

#### Complete Data Migration



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