

HOW TO: SERVICE CLOUD:

Use Quick Actions for Cases

Streamline tasks to save your agents valuable time.

Help your service agents streamline tasks and work more efficiently. Certified Specialists will help you determine which service processes you can automate with Quick Actions. Then you'll learn how to build those actions in your sandbox for fast testing and implementation.

What it can do for you.

- Increase service rep efficiency
- Reduce time to close cases
- Reduce service response time

How it works.

A Certified Specialist will guide you through the process via four-five calls totaling 5-7 hours over 2 to 3 weeks.

Discovery

- Discuss current challenges and business goals
- Review quick actions options and features
- Identify five processes/use cases that could be streamlined using

Quick Actions

- Agree on quantifiable success goals

Analysis

- Configure the Quick Actions in a sandbox environment
- Share best practices for setup and usage

Outcomes

- Report findings and recommendations for future development

ADDITIONAL INFORMATION

PREMIER OR SIGNATURE

Time you will spend on this Accelerator: 5-7 hours

GOAL

Minimize operating costs.

INTENDED USER

You want to better manage your service center case queue to clean out system-generated cases.

PREREQUISITES

- Must have Premier or Signature Success Plan.
- Must have purchased and assigned Service Cloud licenses
- A service leader/executive who is engaged and committed to the outcome
- Participation of key service/IT personnel to identify use cases
- Actions and macros have been configured

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To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

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