SERVICE CLOUD

Preconfigured Dashboards

How to Use This Guide

This guide shows you how to take advantage of your preconfigured Service Cloud dashboards, which are set up to give your team actionable insights into your customer experience.

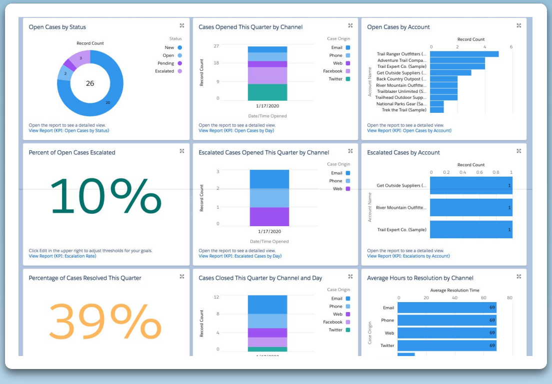
1. Get a tour of each preconfigured dashboard
2. Explore how to adjust components if necessary
3. Share dashboards with your team

As part of getting started with Service Cloud, Salesforce may provide you with resources including setup checklists and preconfigured dashboards. These resources are provided for informational purposes and without warranty, and may not address your specific business needs or requirements. We encourage you to speak with your Salesforce Account Executive if you have any questions.

Dashboard Overview

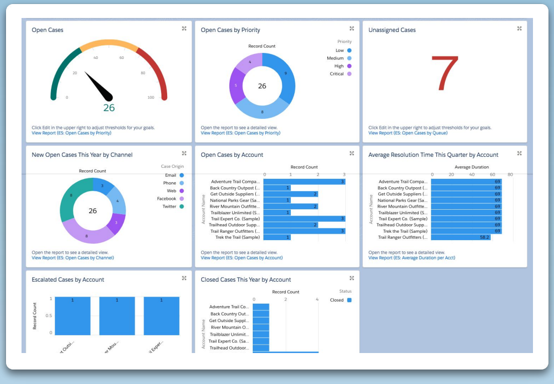
4 Preconfigured Dashboards

You'll find all your dashboards in the **Preconfigured Service Cloud Dashboards** folder.



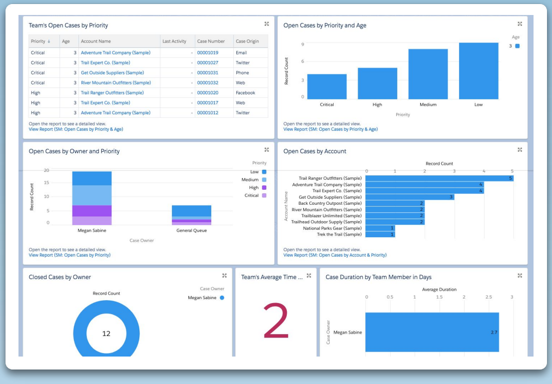
Key Performance Indicators ›

Track service team performance and priority cases.



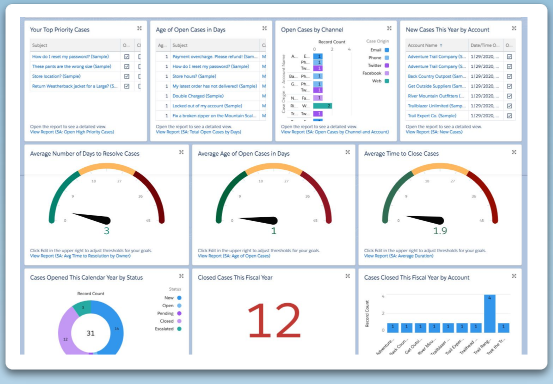
Executive Sponsor: Key Metrics ›

Track high priority cases and service team performance.



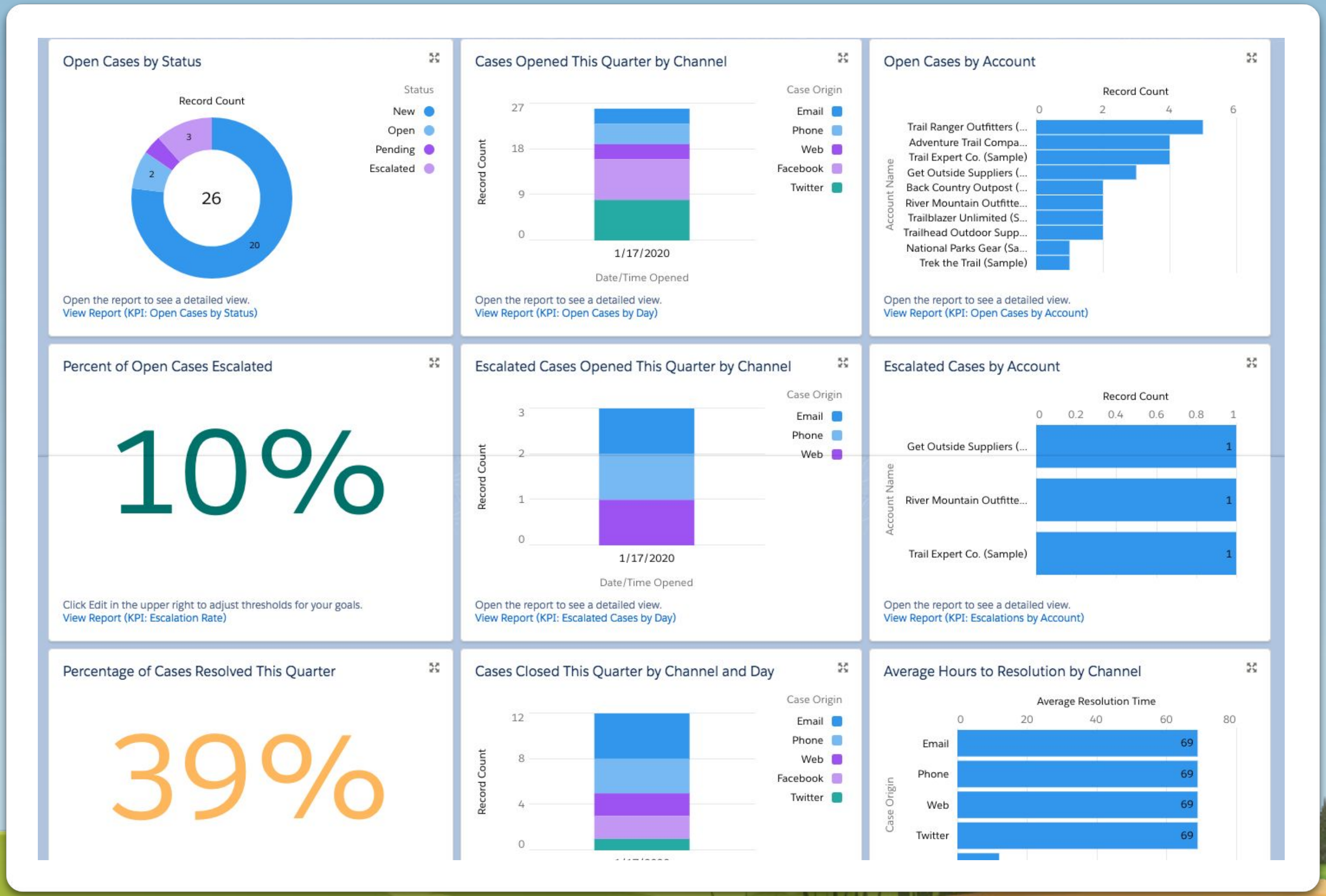
Service Manager: Key Metrics ›

Track team performance and progress toward customer experience goals.



Service Agent: Clean Your Room ›

Track how individual agents make progress toward customer experience goals.



Key Performance Indicators

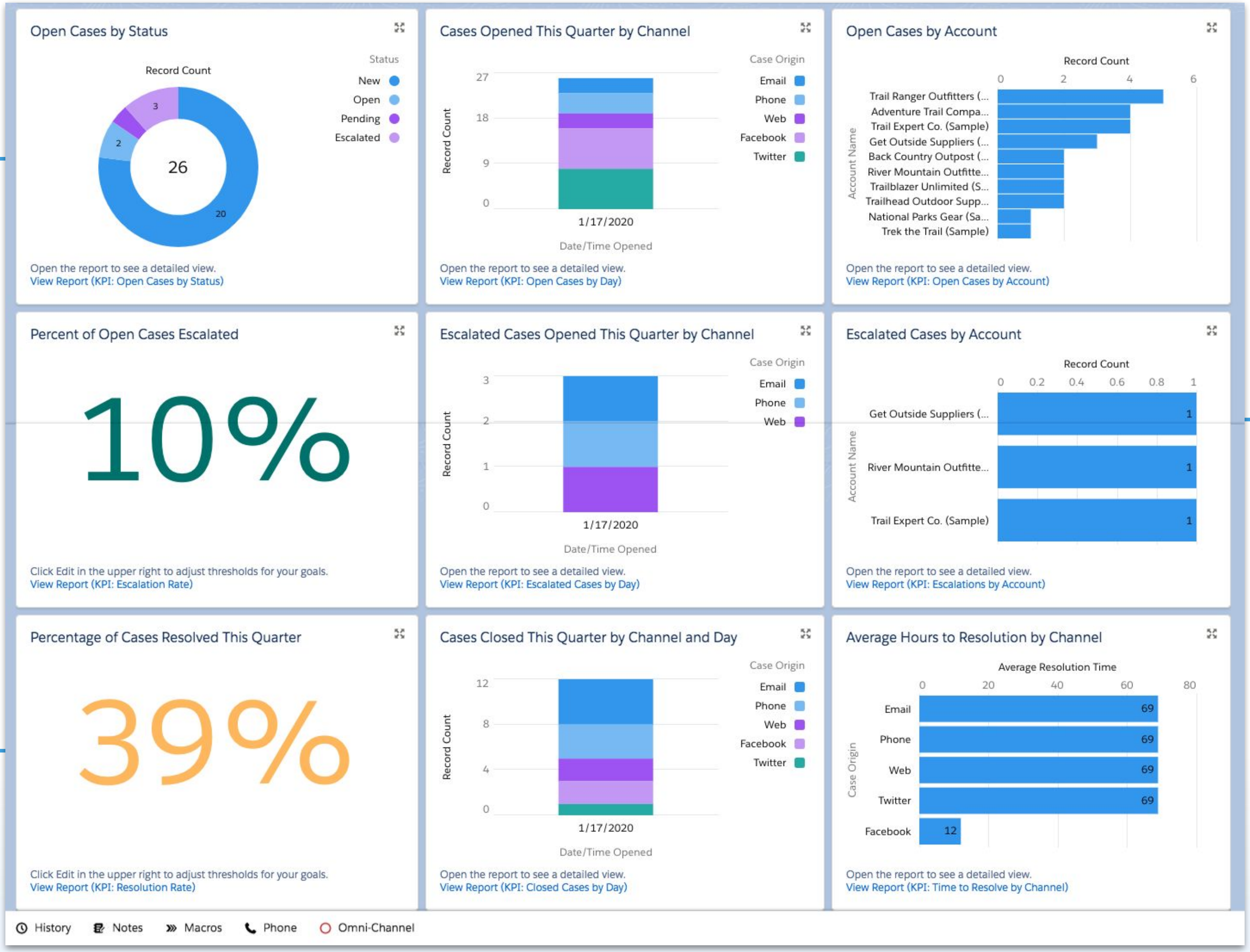
Key Performance Indicators Dashboard

Key Components

Open Case Lists

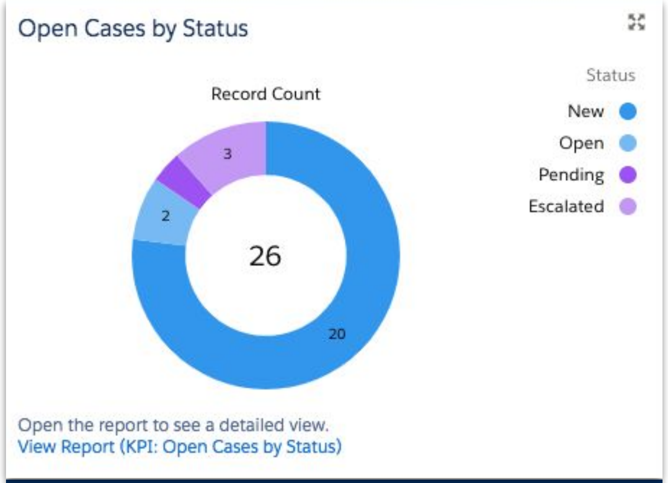
Escalated Case Lists

Case Resolution Metrics



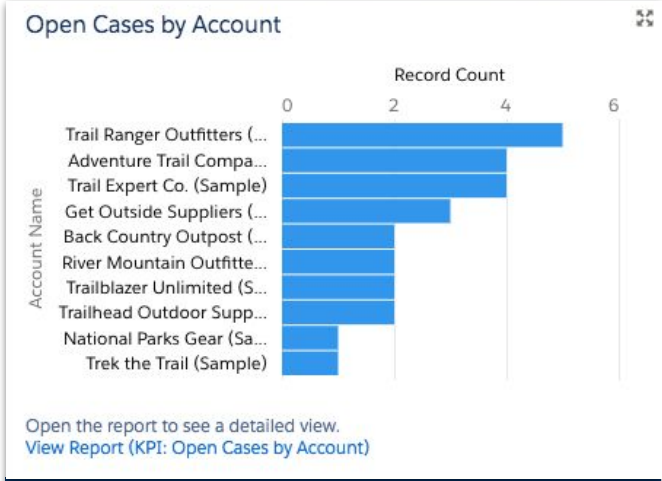
Key Performance Indicators Dashboard

Open Cases



All Open Cases by Status

QTD Open Cases by Channel



All Open Cases

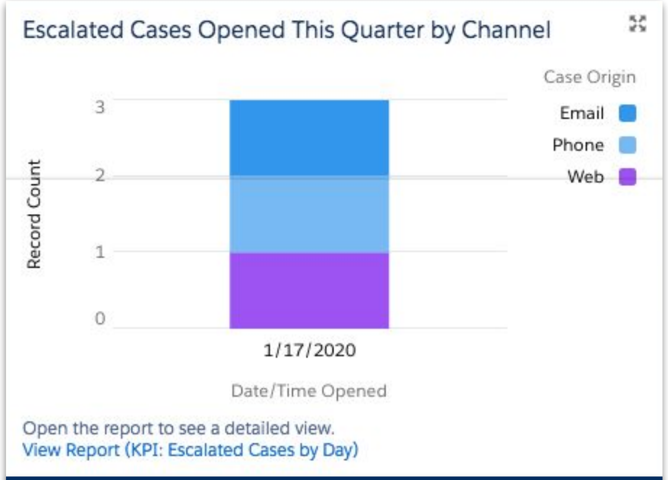
How to use these components

Quickly get the latest info about open customer cases. Track open cases by status, channel, and account, so no customer issue falls through the cracks.

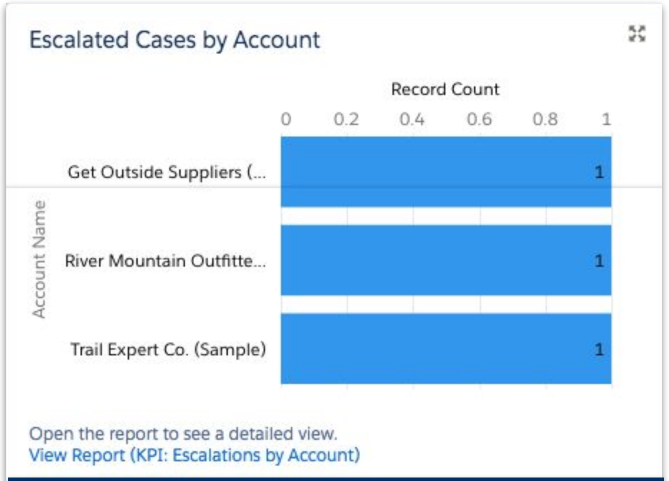
Key Performance Indicators Dashboard

Escalated Cases

Escalation Rule



QTD Escalated Cases by Channel



All Escalated Cases by Account

How to use these components

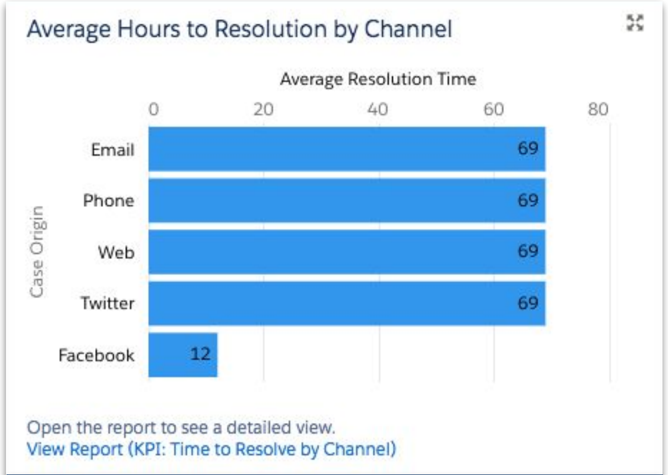
See the percentage of cases that are escalated, escalated cases by channel, and escalated cases by account. Use this info to ensure that escalated cases get the attention they need.

Key Performance Indicators Dashboard

Case Resolution

QTD Percent Resolved Cases

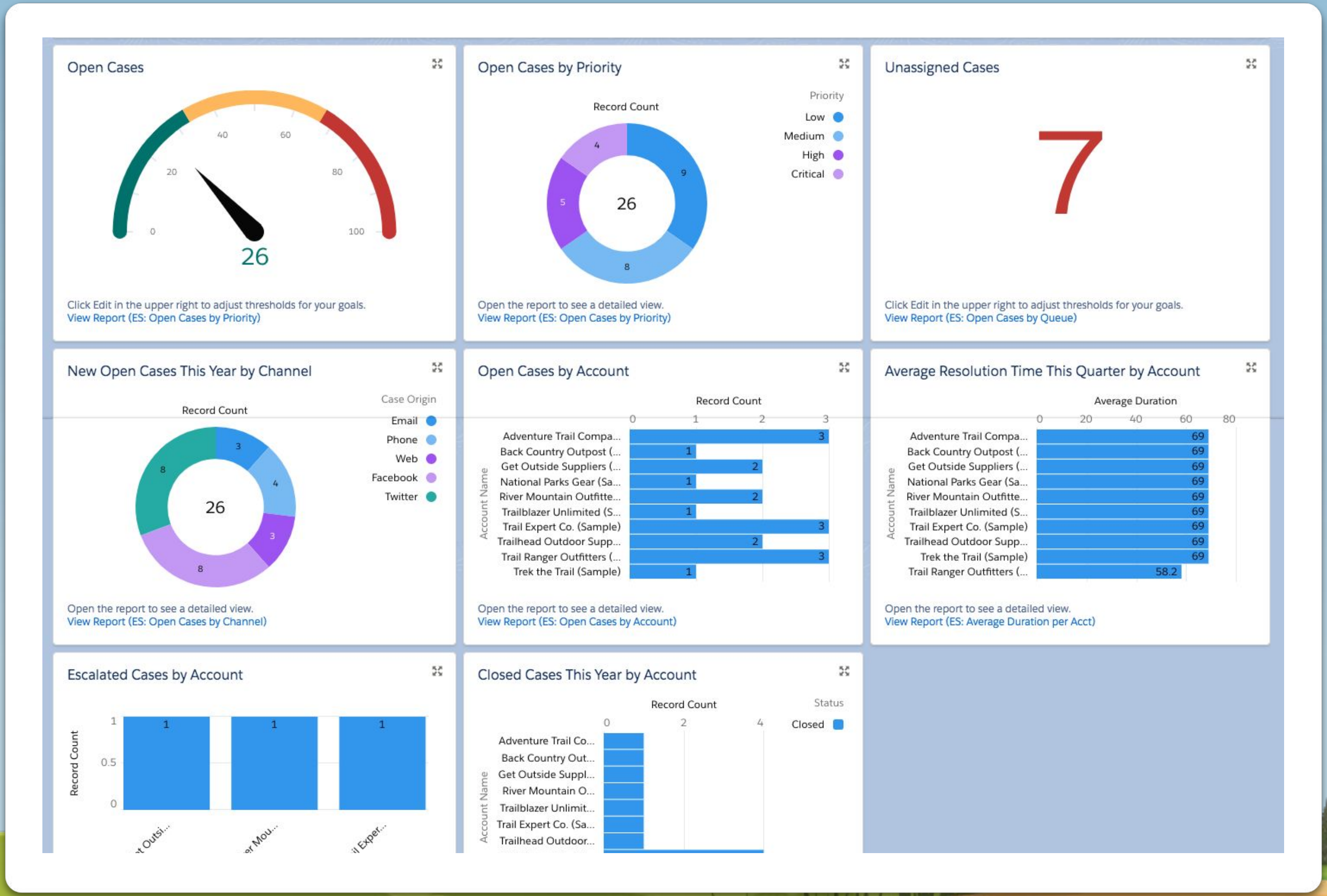
QTD Closed Cases by Channel



Average Time to Resolution

How to use these components

See the percent of resolved cases this quarter, the number of closed cases for each channel this quarter, and the all time average time to resolve cases by channel. Use this info to evaluate case resolution performance.

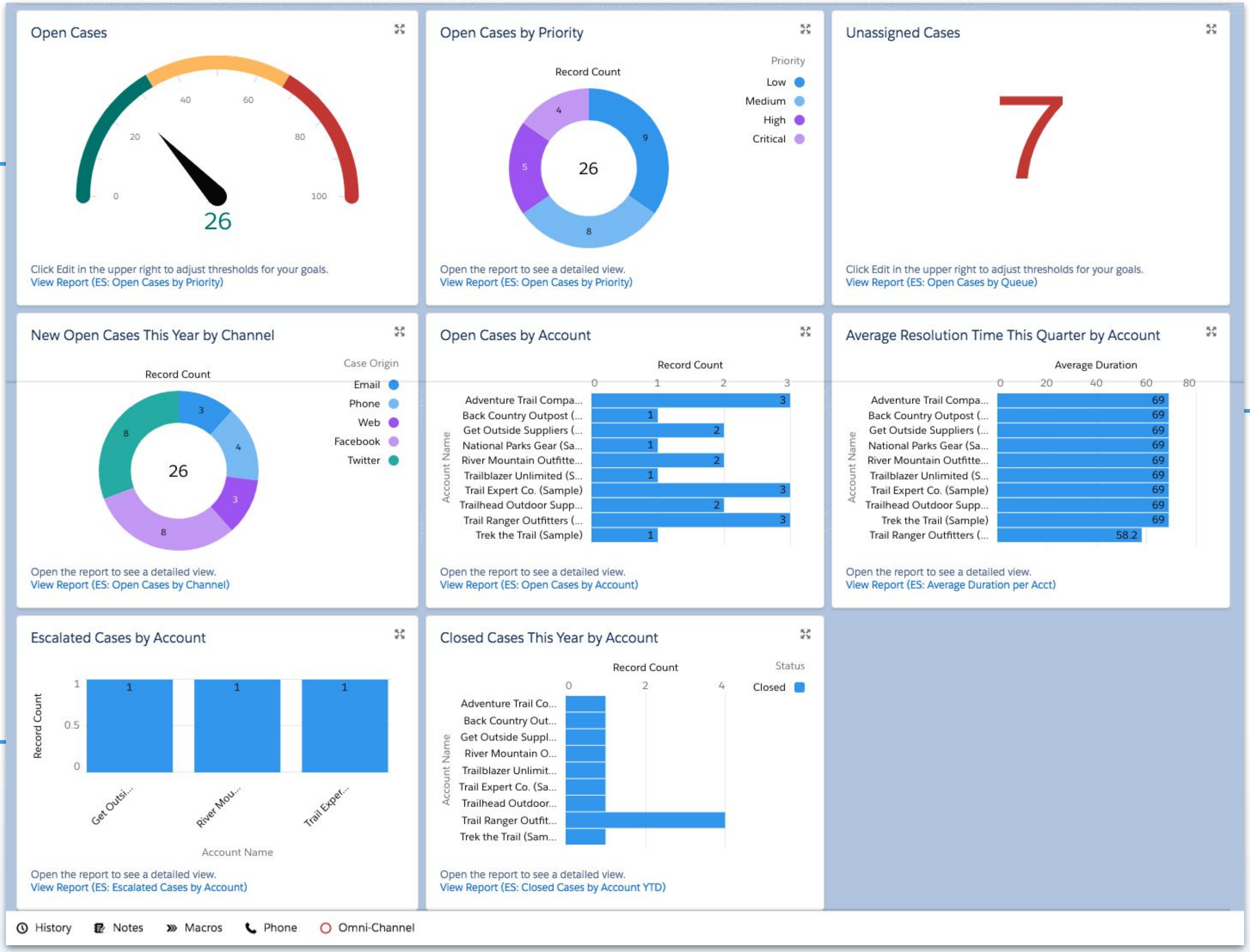


Executive Sponsor: Key Metrics

Executive Sponsor: Key Metrics Dashboard

Key Components

Open case volume and priority

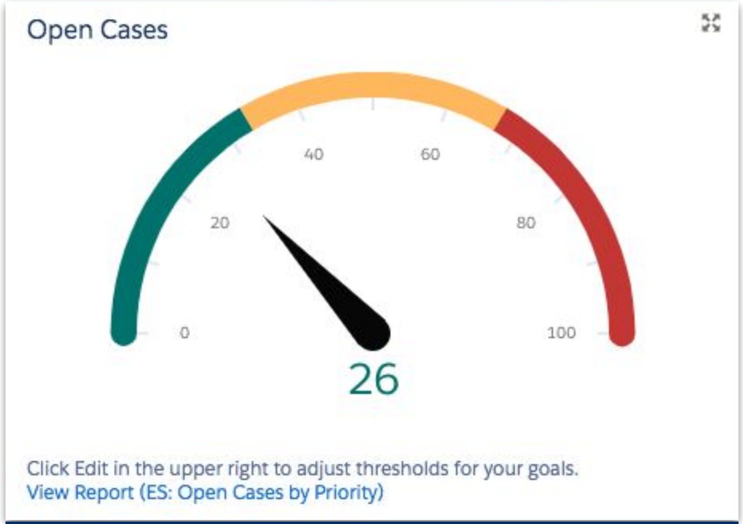


New case volume, open case by account, time to resolution

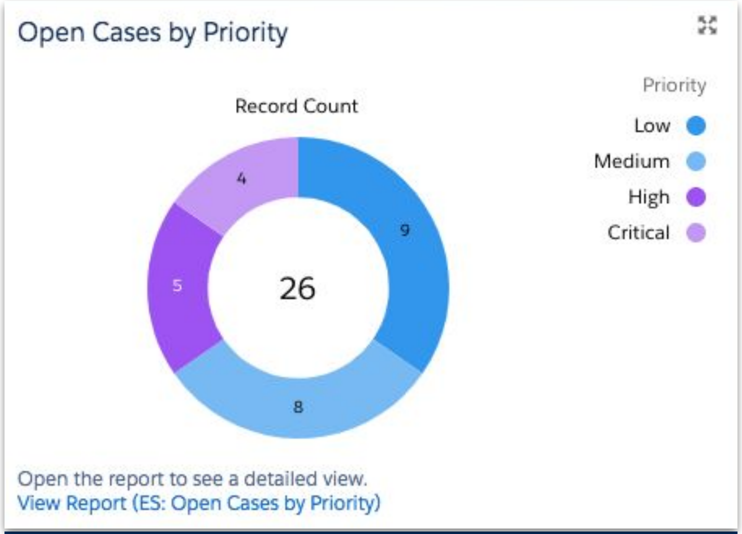
Escalated and closed cases by account

Executive Sponsor: Key Metrics Dashboard

Open Case Volume and Priority



All Open Cases



Open Cases by Priority

All Unassigned Cases

How to use these components

Get insights into case volume compared to the company’s goals, open cases sorted by priority, and the number of unassigned cases. Business leaders can use this info to track open cases at a high level.

New Cases, Open Cases, and Time to Resolution

All Open Cases New this Year by Channel

All Open Cases by Account

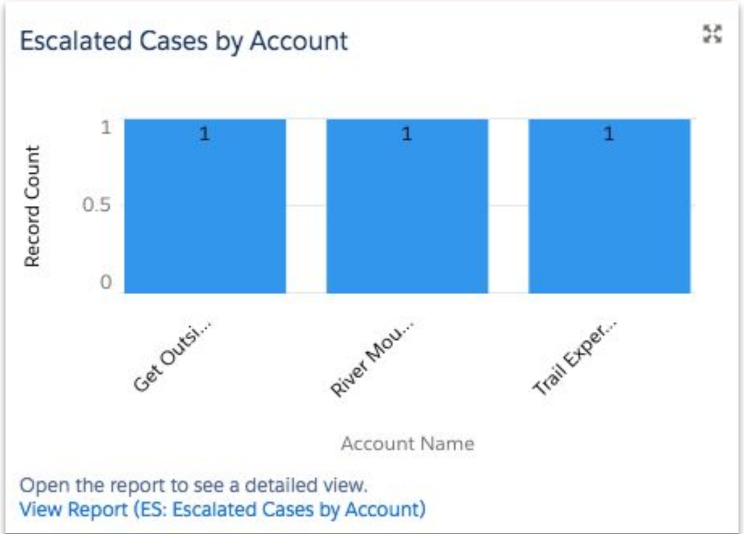
Time to Resolution this Quarter by Account

How to use these components

Quickly see how many open cases were created this year by channel, open cases by account, and resolution times this quarter. Business leaders can use this info to track overall company performance.

Executive Sponsor: Key Metrics Dashboard

Escalated and Closed Cases

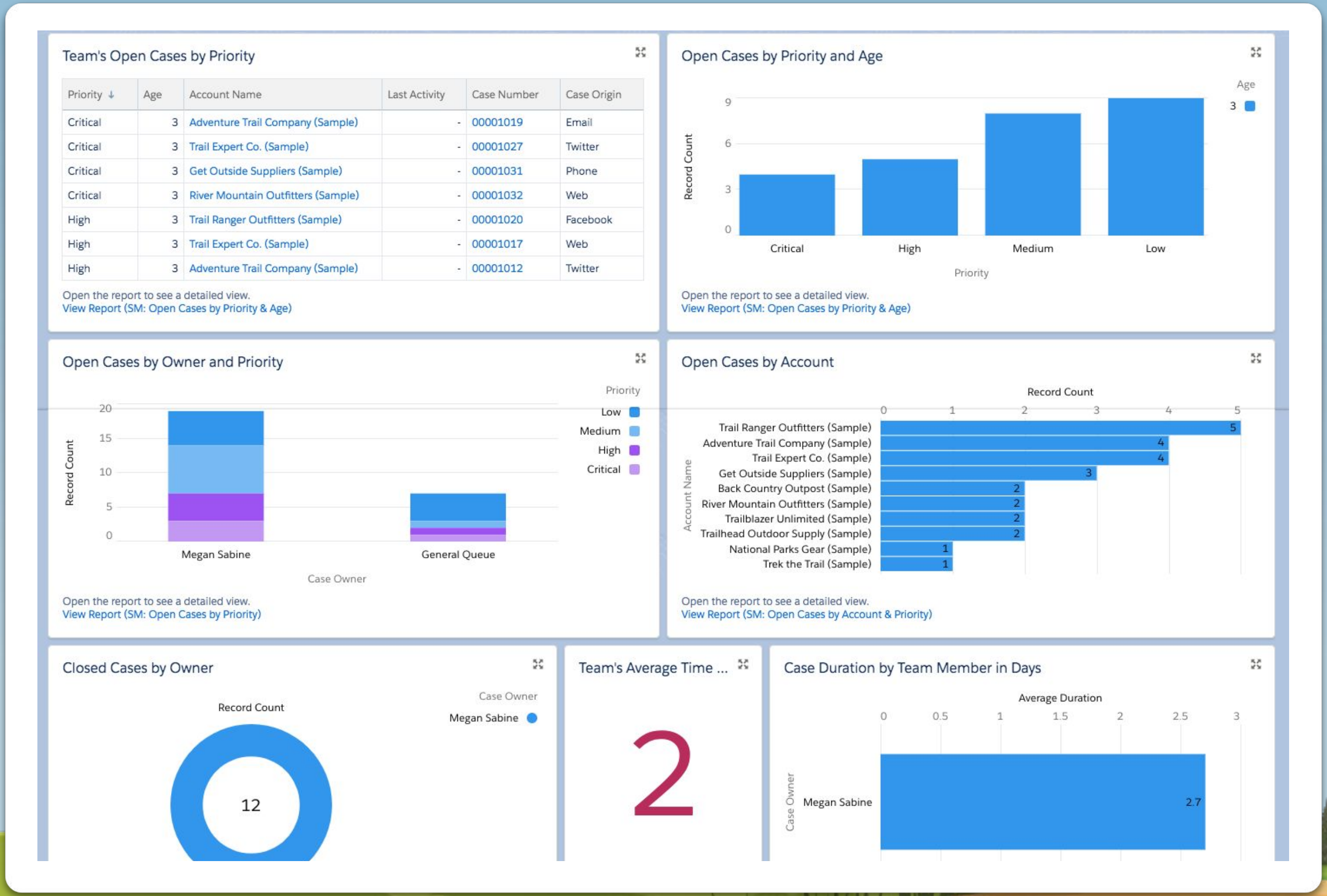


All Escalated Cases by Account

YTD Closed Cases by Account

How to use these components

See all escalated cases by account and cases closed this year by account. Business leaders can use this info to track account escalation and closing trends across the business.



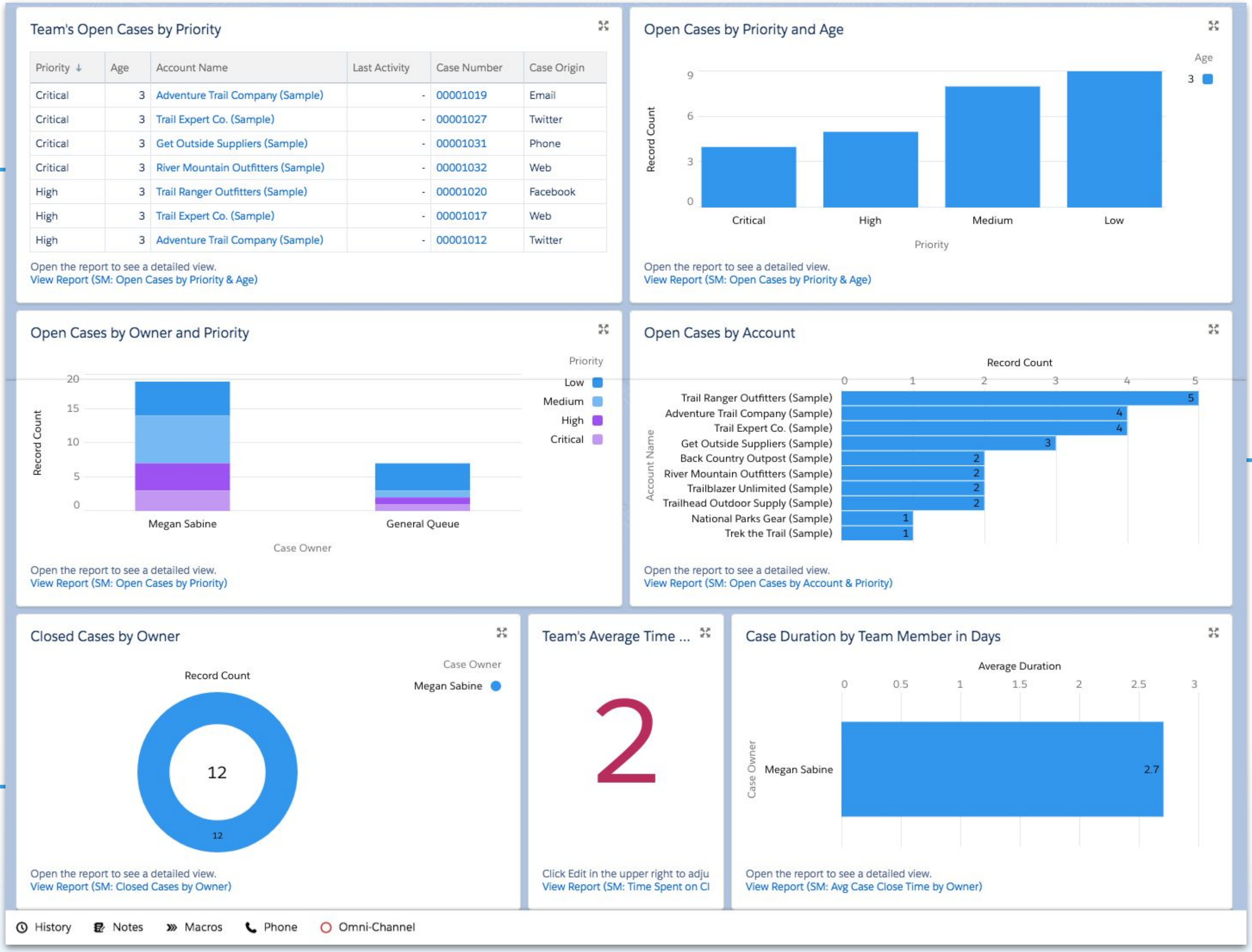
Service Manager: Key Metrics

Service Manager: Key Metrics Dashboard

Key Components

DIRECTIONS: Click “Refresh” to view your data

Your team’s open cases by priority and age



Your team’s open cases by priority and account

Your team’s time spent on cases

Service Manager: Key Metrics Dashboard

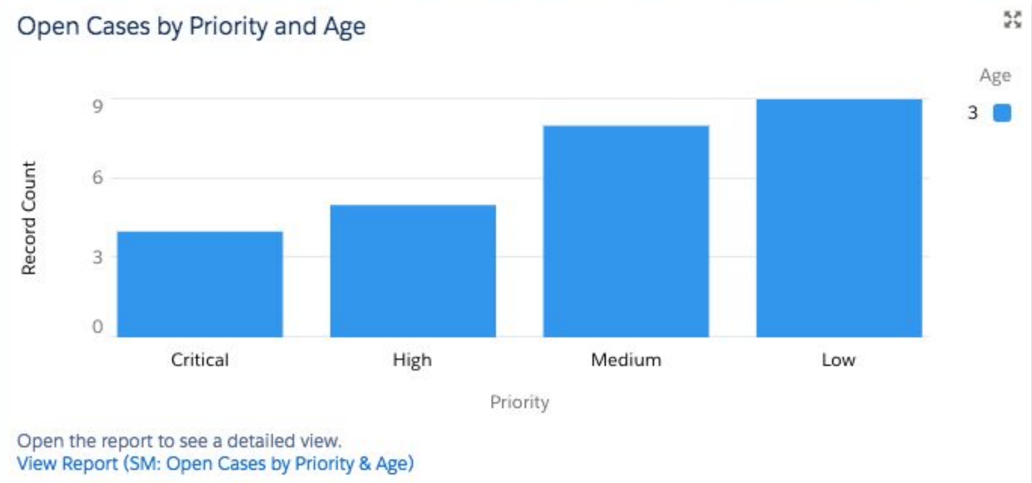
Your Team's Case Progress

Team's Open Cases by Priority

Priority ↓	Age	Account Name	Last Activity	Case Number	Case Origin
Critical	3	Adventure Trail Company (Sample)	-	00001019	Email
Critical	3	Trail Expert Co. (Sample)	-	00001027	Twitter
Critical	3	Get Outside Suppliers (Sample)	-	00001031	Phone
Critical	3	River Mountain Outfitters (Sample)	-	00001032	Web
High	3	Trail Ranger Outfitters (Sample)	-	00001020	Facebook
High	3	Trail Expert Co. (Sample)	-	00001017	Web
High	3	Adventure Trail Company (Sample)	-	00001012	Twitter

Open the report to see a detailed view.
View Report (SM: Open Cases by Priority & Age)

Open Cases by Priority



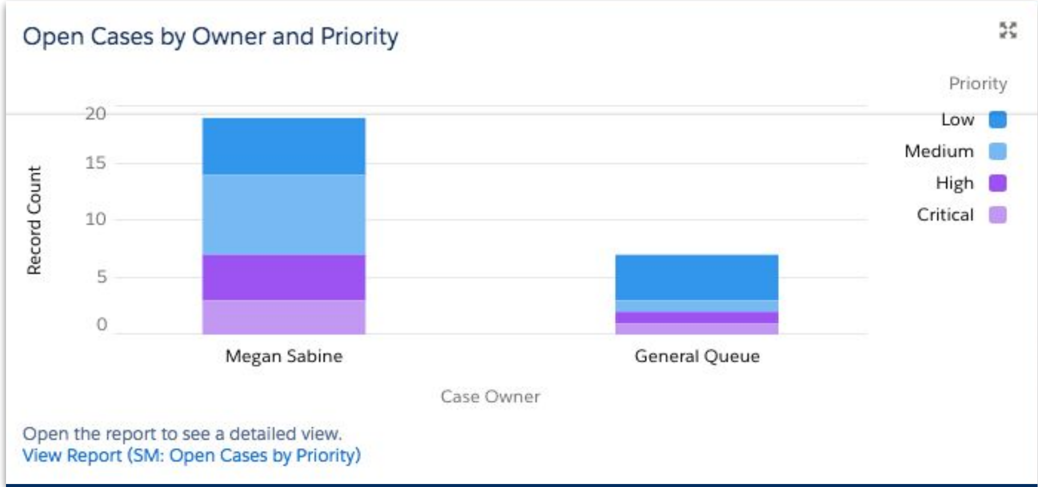
Open Cases by Priority and Age

How to use these components

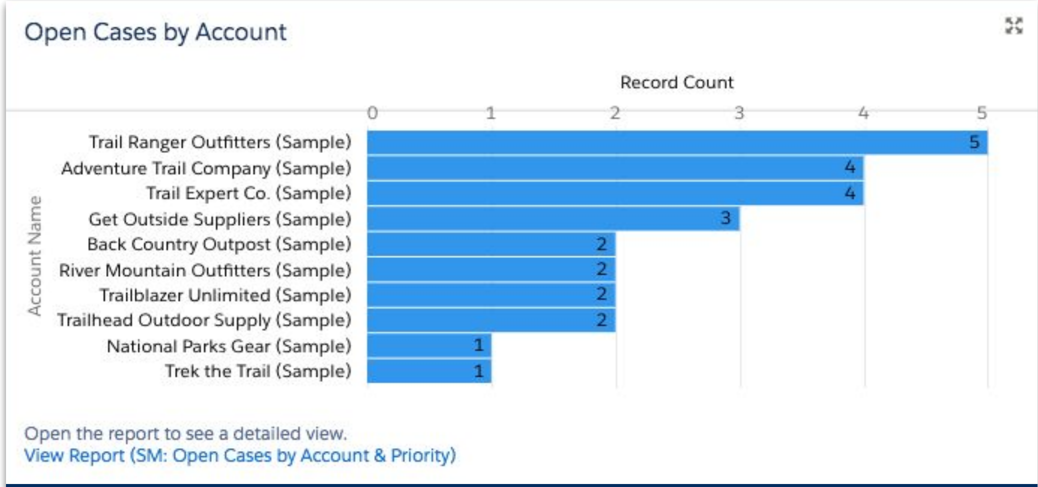
Quickly view a team's open cases by priority and age. Service managers can use this info to track performance and ensure that a team is making progress toward their goals.

Service Manager: Key Metrics Dashboard

Your Team’s Priority Cases



Open Cases by Owner and Priority



Open Cases by Owner

How to use these components

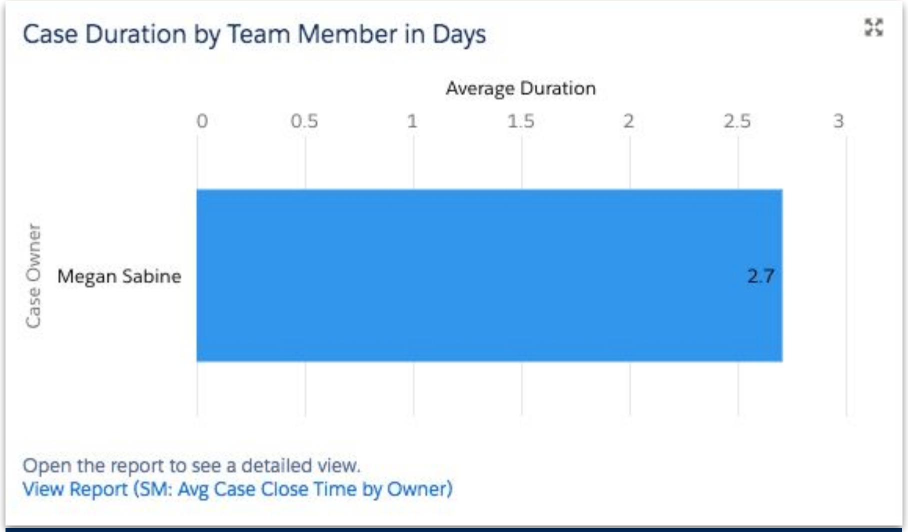
Get an overview of a team’s cases by owner and priority. Service managers can use this info to evaluate and manage agent workload, case priority, and performance.

Service Manager: Key Metrics Dashboard

Your Team's Time Spent on Cases

Your Team's Closed Cases by Owner

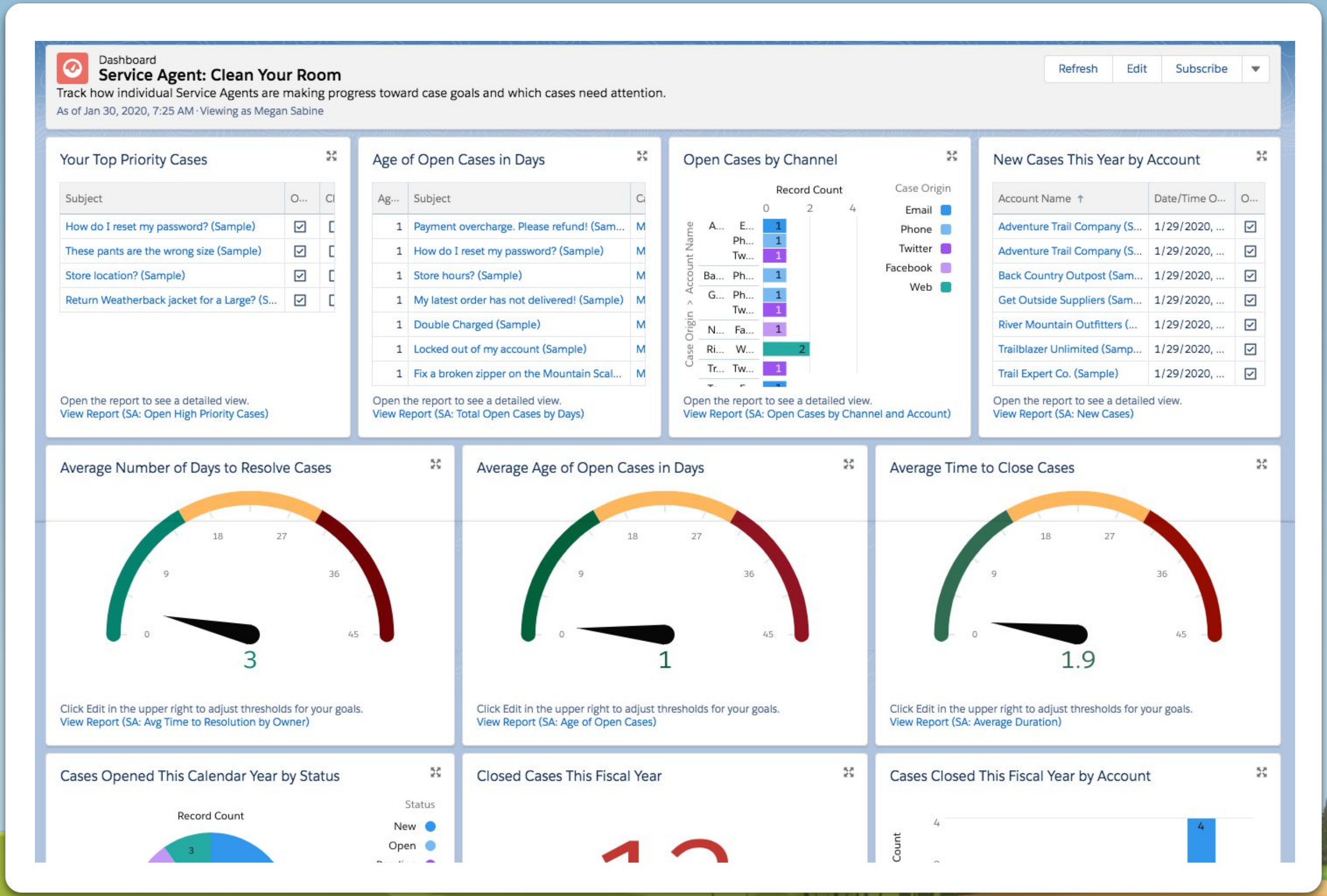
Your Team's Average Resolution Time



Your Team's Case Duration

How to use these components

Quickly see the number of cases closed by owner, the average time to resolution for your team, and the same number for individual team members. Service managers can use these metrics to track how much time is spent on cases and closing trends.



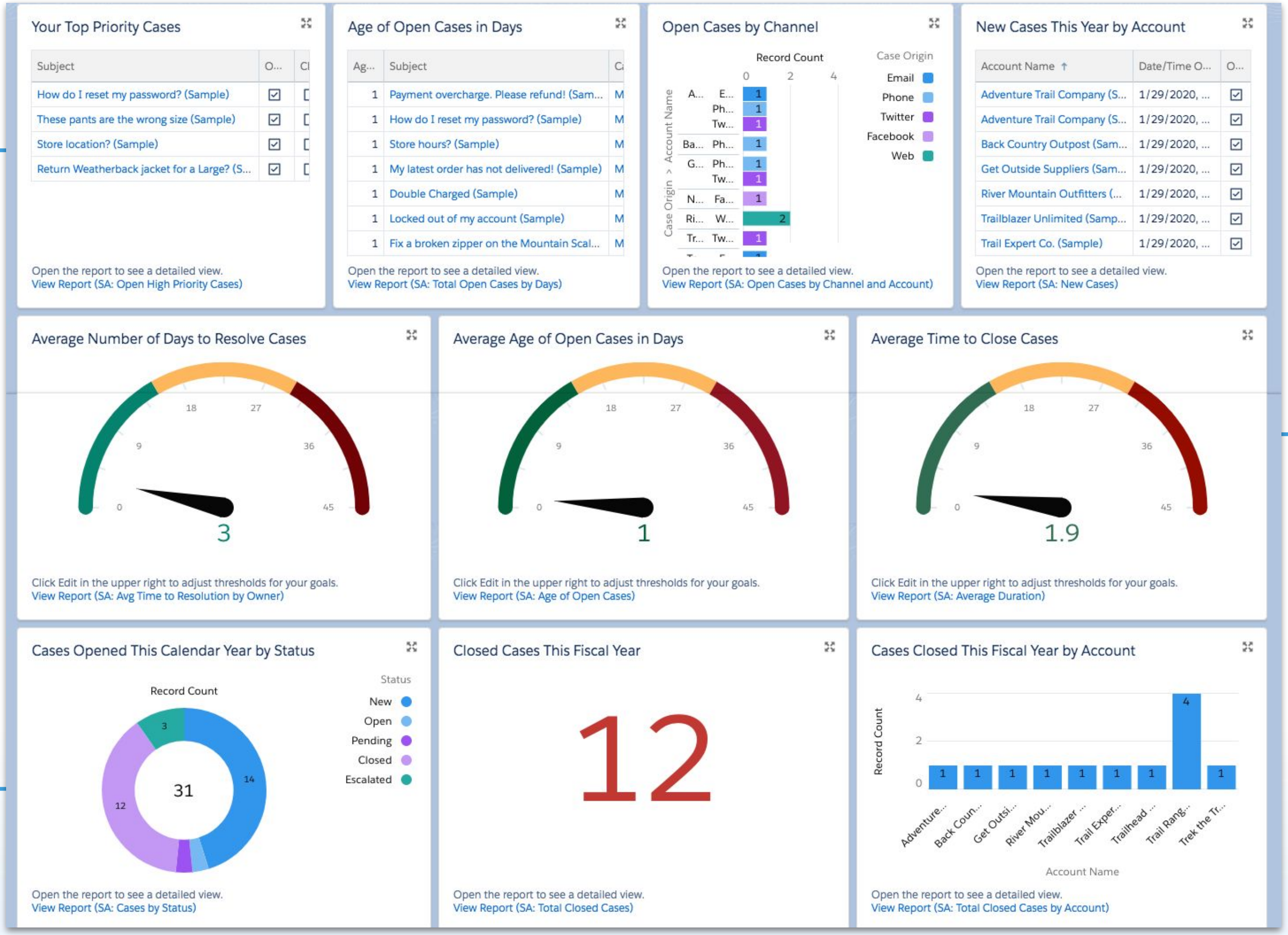
Service Agent: Clean Your Room

Service Agent: Clean Your Room Dashboard

Key Components

DIRECTIONS: Click “Refresh” to view your data

Agent Caseload

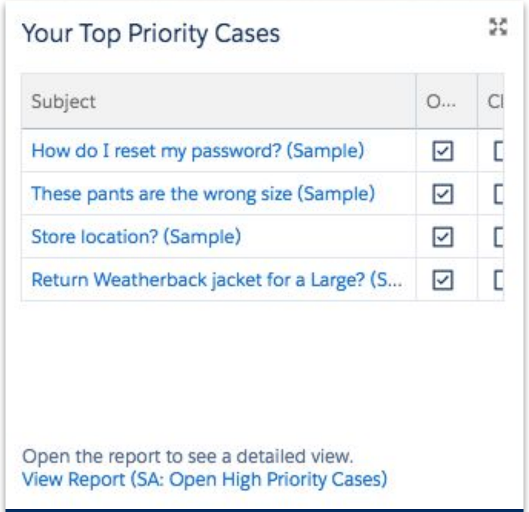


Average Handle Time

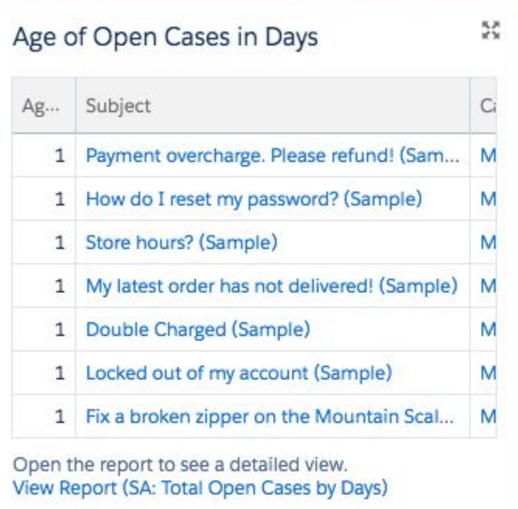
Closed Case Metrics

Service Agent: Clean Your Room Dashboard

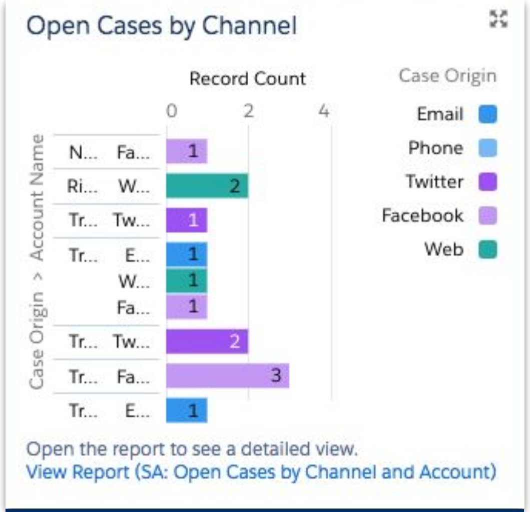
Agent Caseload



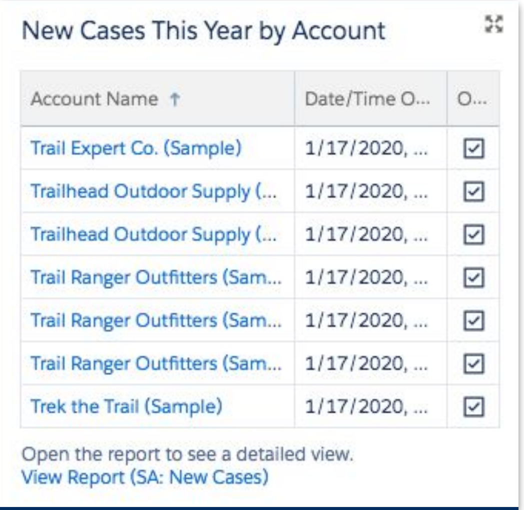
Priority Cases



Open Cases Age



Open Cases by Channel



New Cases this Year by Account

How to use these components

Get insights into an individual agent's caseload. Agents can use this info to track their priority cases, case age, and new cases by action, so they know which customers need attention.

Service Agent: Clean Your Room Dashboard

Handle Time

Average Time to Resolution

Average Age of Open Cases

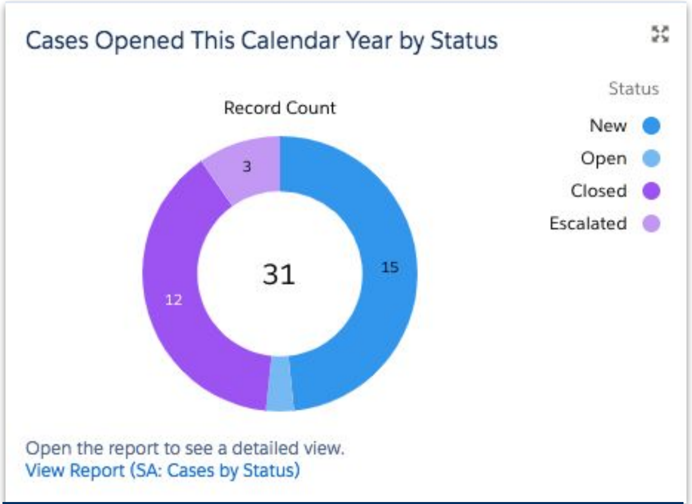
Average Time to Close Cases

How to use these components

Quickly see an individual agent’s average time to handle cases. Agents can use this info to measure progress toward delivering a fast and useful customer experience.

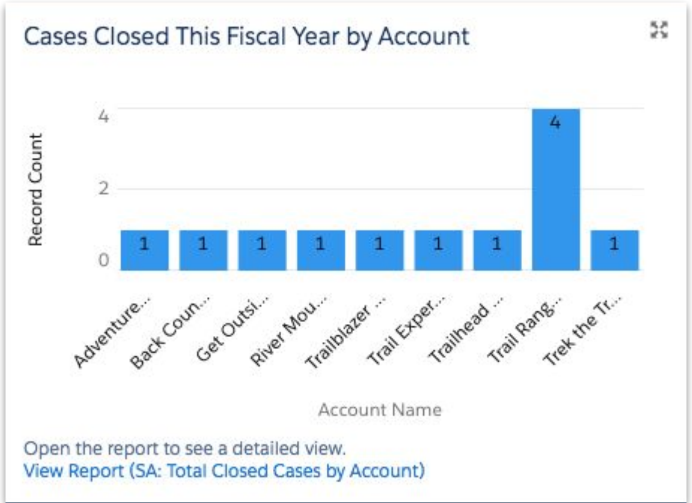
Service Agent: Clean Your Room Dashboard

Closed Cases



YTD Cases by Status

FYTD Closed Cases



Closed Cases by Account

How to use these components

View all of an individual agent's cases organized by status, the cases an agent case closed this fiscal year, and closed cases sorted by account. Agents can use this info to track where cases stand and the cases they've closed.

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WELCOME

SERVICE

Fine-Tune Dashboards for Your Team

Admin Hero's Dashboard Preparation Steps

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1. Edit your dashboard goals, thresholds, and components (instructions)
    a. For any component, click **Edit** to enable the editing mode. Then click the pencil icon ( ) next to the component you want to edit. From here you can change the component type and rename labels.
    b. For revenue dial components or metric components, update the dial to reflect your goals and the thresholds so that the color scale (green, orange, red) is tuned to your business needs. Click here to learn how.
2. Add your users and assign them the correct role and team to keep team dashboards accurate (instructions)
3. Remove sample data before going live by deleting sample accounts (instructions)
4. If your company uses a custom fiscal calendar, adjust the your organization's Fiscal Year (instructions)

Admin Hero's Dashboard Tips and Tricks

- **Automate dashboard update emails:** Set up subscriptions to deliver dashboards to team members on a set schedule via email (instructions)
- **Master dashboards and reporting:** Use Trailhead to learn more about reports and dashboards and formulas and validations
- **Refresh your dashboard data:** Remind users to refresh their dashboards to view their current data (instructions)
- **Get more report details:** For every dashboard component, open the related report link to see additional data