



Salesforce Service Analytics

Administrator Guide

Package Version 1.0

Last Updated 16th July 2020

Contents

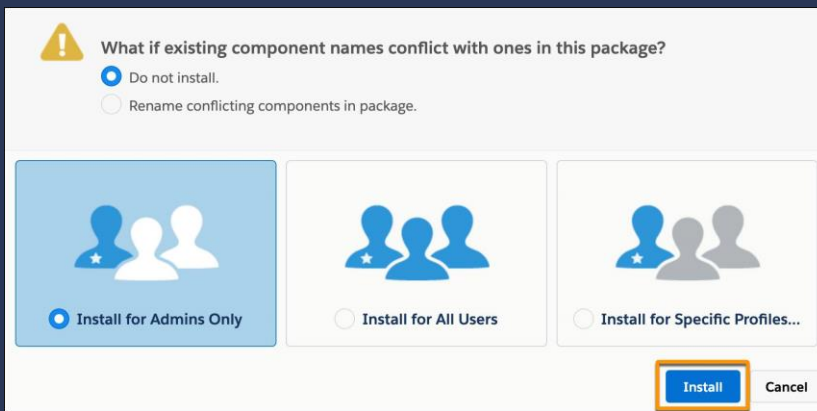
Introduction	2
Installing the Application	2
Accessing the Dashboard	3
Filtering the Dashboard	3
Customising the Dashboard	3
Accessing the Reports	4
Customising the Reports	4
Working in Salesforce Classic	4

Introduction

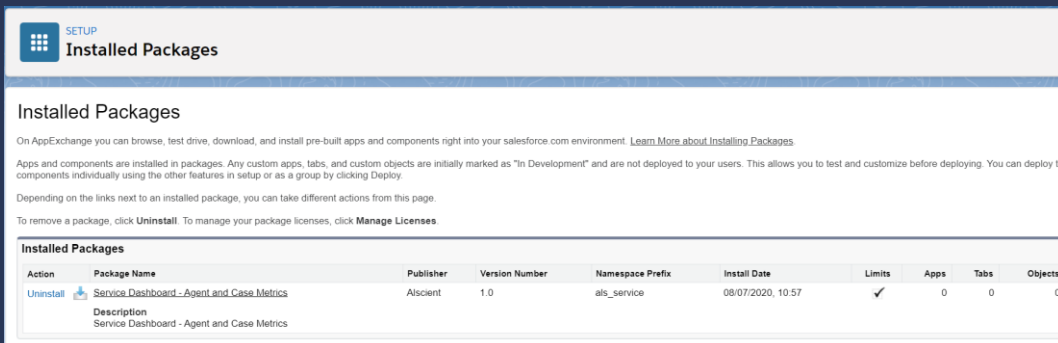
Alscient Salesforce Service Analytics provides a starting point for reporting on your Salesforce case performance, providing key agent and case productivity metrics in pre-built reports and dashboards.

Installing the Application

1. Click the 'Get It Now' button on the AppExchange listing
2. Log into the Salesforce account you wish to install the package in
3. Choose who you would like to install the package for. If you choose to install the package for admins only, you will be able to grant other users access to the reports and dashboard later.



4. Wait to receive an email confirming that the package has been successfully installed
5. Verify that the package has been correctly installed by navigating to Setup -> Installed Packages



Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Service Dashboard - Agent and Case Metrics	Alscient	1.0	als_service	08/07/2020, 10:57	✓	0	0	0

For more information, see [Installing Packages](#).

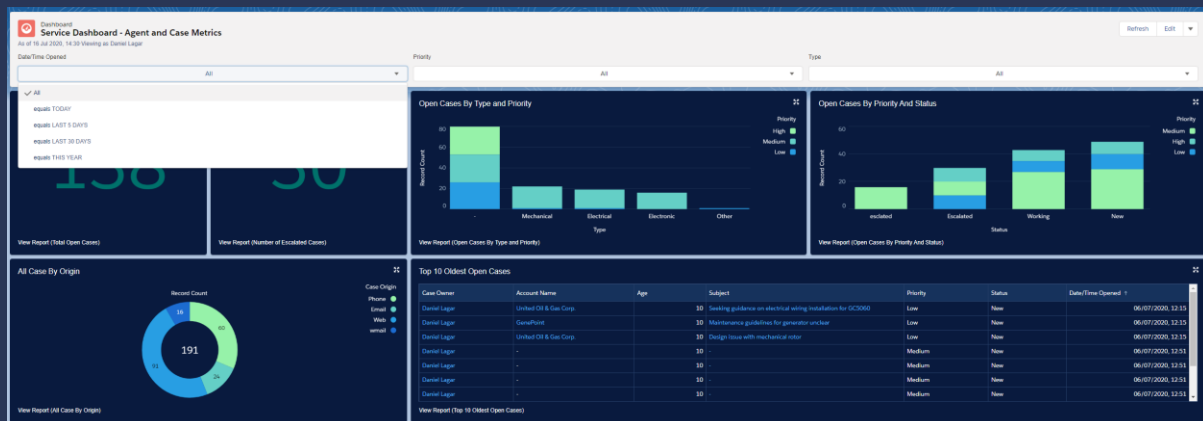
Accessing the Dashboard

1. Navigate to the dashboards tab -> All Folders -> Alscient - Case Dashboard
2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the dashboard
3. Click on the folder name to open it, then click Service Dashboard - Agent and Case Metrics to open the dashboard

For more information, see [Share a Report or Dashboard Folder in Lightning Experience](#).

Filtering the Dashboard

1. Click on the filter drop-down menu you wish to use
2. Select your chosen option

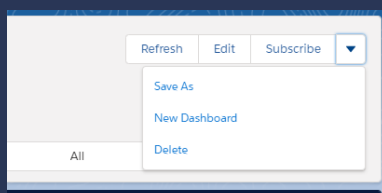


3. Click outside of the filter box and the dashboard will automatically update to only include information which meets the filter criteria

For more information, see [Apply a Dashboard Filter](#).

Customising the Dashboard

1. To edit the existing dashboard, click the Edit button in the top right
2. To clone the dashboard and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click the Edit button once it has been created



3. You will now be in the dashboard editor where you are free to add, remove, edit and move any dashboard components or filters

For more information, see [Build a Lightning Experience Dashboard](#).

Accessing the Reports

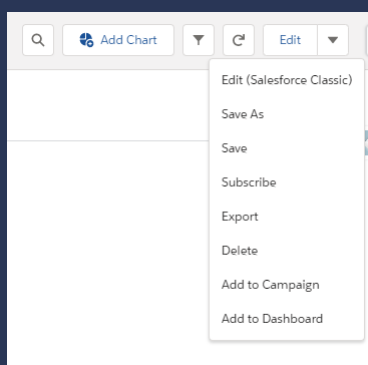
1. Navigate to the reports tab -> All Folders -> Alscient - Case Reports
2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the reports
3. Click on the folder name to open it, then click on a specific report name to access that report
4. You can also access a report directly from the dashboard, by clicking the View Report hyperlink at the base of a component



For more information, see [Share a Report or Dashboard Folder in Lightning Experience](#).

Customising the Reports

1. To edit an existing report, click the Edit button in the top right
2. To clone the report and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click Edit once it has been created



3. You will now be in the report builder, where you are free to customise the report

For more information, see [Build a Report in Lightning Experience](#).

Working in Salesforce Classic

It is possible to view the dashboard, view the reports and customise the reports in Salesforce Classic. Navigate to the relevant reports or dashboard using the tabs and folder structures. However, it is not

possible to edit the dashboard in Salesforce Classic so you will need to switch to Lightning Experience to do so.

For more information about switching between Salesforce Lightning and Salesforce Classic, see [Toggle or Switch between Lightning Experience and Salesforce Classic](#).

For more information about editing reports in Salesforce Classic, see [Build a Report in Salesforce Classic](#).