

Salesforce Training Worksheet

Name: _____

Use the Salesforce Beyond the Basics Module, the Related Cases Module, and the [Salesforce Training Resources Wiki](#) to complete this worksheet.

Question	Answer
1. Find Penny Ann Carver's (500120658) contact record. Which high school are they affiliated with?	
2. What does the note (added on September 18, 2020) on case number 00109156 say?	
3. Use the global search to find a contact record for student ID: 500528589. What is their name?	
4. When did we receive Audra Meadow's ACT score? What was the score?	
5. Navigate to case number 00109437. How many files are attached? What is the name of the file? Are there any additional contacts referenced on this case?	
6. Email Scenario 1: Email from a current student who emailed askabuckeye@osu.edu from their OSU email account Would there be a contact name set on this case already? If so, what would it be?	

<p>7. Email Scenario 2:</p> <p>From a current student to askabuckeye@osu.edu using their non-OSU (Gmail) email.</p> <p>Will the contact name automatically be set to the student? If not, how can we update the record to make sure that will happen in the future? Can you respond with account-specific information to the non-OSU email?</p>	
<p>8. Email Scenario 3:</p> <p>Email to askabuckeye@osu.edu from a prospective undergraduate student. Their name is Emily Hayes and they emailed from emilyhayes123@gmail.com. They are emailing for the first time and no contact record exists in Salesforce</p> <p>Do you need to create a contact in Salesforce? If so, how? What information do you have available to include on the record?</p>	
<p>9. Phone Scenario 1:</p> <p>A current student calls us to ask questions about their own account. The contact record already exists in Salesforce.</p> <p>How do you document your conversation with the student?</p>	
<p>10. Phone Scenario 2:</p> <p>A prospective student calls to ask questions about applying. No contact record exists in Salesforce.</p> <p>How do you create a contact record? How do you create a case? Which case record type should you use?</p>	

<p>11. Phone Scenario 3:</p> <p>A high school guidance counselor calls to ask if we received a student's transcript. The student has already applied and the contact record is already created in Salesforce.</p> <p>Can you release account-specific information? Whose record do you create a case on? Which case origin should you use?</p>	
<p>12. What is a Related Case?</p>	
<p>13. How do you create a related case?</p>	