

Salesforce Training Worksheet

Name: _____

Use the Salesforce Introduction and Responding to Emails Modules and the [Salesforce Training Resources Wiki](#) to complete this worksheet.

Question	Answer
<p>Email from a current student who emailed askabuckeye@osu.edu from their OSU email account</p> <ul style="list-style-type: none">• Would there be a contact name set on this case already? If so, what would it be?	
<p>From a current student to askabuckeye@osu.edu using their non-OSU (Gmail) email.</p> <ul style="list-style-type: none">• 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>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> <ul style="list-style-type: none">• Do you need to create a contact in Salesforce? If so, how?• What information do you have available to include on the record?	

<p>A current student calls us to ask questions about their own account. The contact record already exists in Salesforce.</p> <ul style="list-style-type: none"> • How do you document your conversation with the student? 	
<p>A prospective student calls to ask questions about applying. No contact record exists in Salesforce.</p> <ul style="list-style-type: none"> • How do you create a contact record? • How do you create a case? • Which case record type should you use? 	
<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> <ul style="list-style-type: none"> • Can you release account-specific information? • Whose record do you create a case on? • Which case origin should you use? 	
<p>What does a good email include?</p>	

<p>After reviewing the emailed response to Betty, what are some good aspects of the email that you noticed?</p>	
<p>What are some aspects of a not-so-good email?</p>	
<p>After reviewing the response to Gray's email, what could we have done differently?</p>	