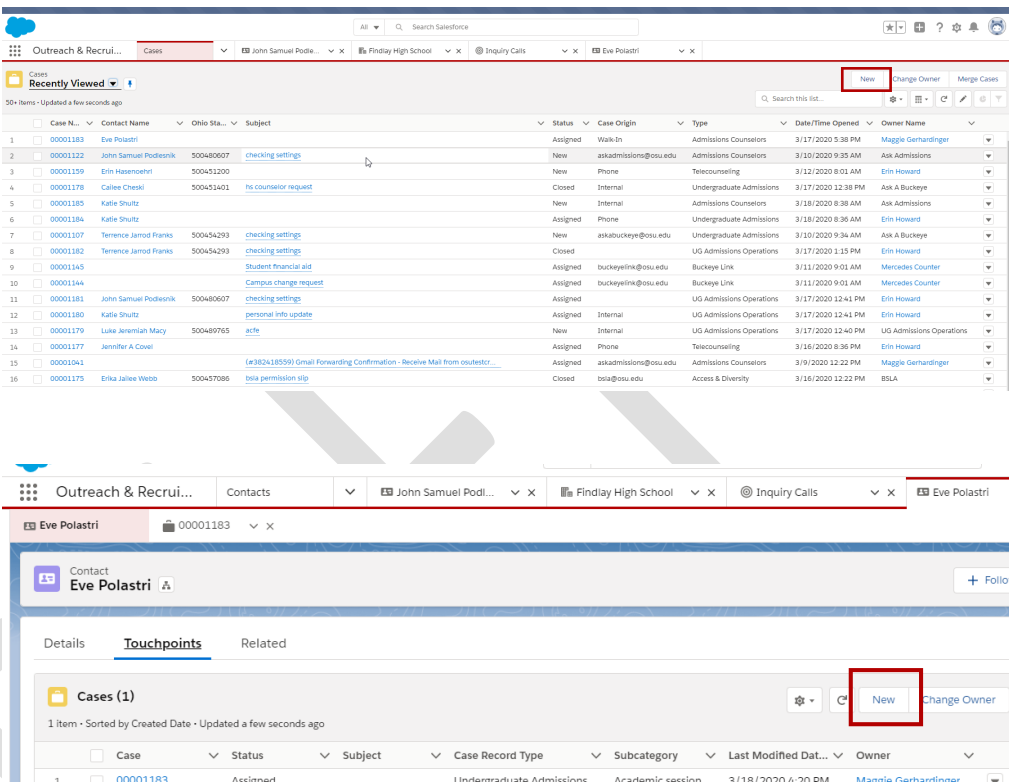
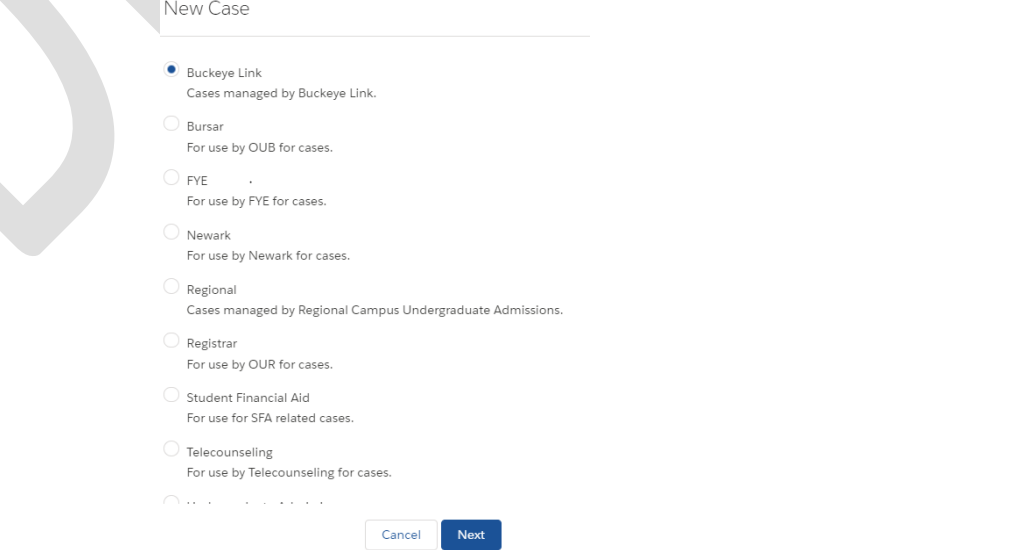


CREATING A CASE

Step-by-Step	Screen																																																																																																																																																									
<p>Case creation can be initiated in multiple places within Salesforce.</p> <ol style="list-style-type: none">From any Case List View<ol style="list-style-type: none">Click “New” Button in the Actions BarFrom a Contact<ol style="list-style-type: none">Navigate to view a contact’s cases under the “Touchpoints” tabClick “New” Button in the Actions Bar	 <p>The screenshot shows two parts of the Salesforce interface. The top part is a 'Cases' list view for 'Eve Polastri'. It has a table with columns: Case Number, Contact Name, Ohio State, Subject, Status, Case Origin, Type, Date/Time Opened, and Owner Name. A 'New' button is highlighted in the top right. The bottom part shows the 'Touchpoints' tab for the same contact, with a 'Cases (1)' section. A 'New' button is also highlighted in the top right of this section.</p> <table border="1"><thead><tr><th>Case N.</th><th>Contact Name</th><th>Ohio Sta.</th><th>Subject</th><th>Status</th><th>Case Origin</th><th>Type</th><th>Date/Time Opened</th><th>Owner Name</th></tr></thead><tbody><tr><td>00001183</td><td>Eve Polastri</td><td></td><td></td><td>Assigned</td><td>Walk-In</td><td>Admissions Counselors</td><td>3/17/2020 5:38 PM</td><td>Maggie Gernardinger</td></tr><tr><td>00001122</td><td>John Samuel Podestri</td><td>500480607</td><td>checking settings</td><td>New</td><td>askadmissions@osu.edu</td><td>Admissions Counselors</td><td>3/10/2020 9:35 AM</td><td>Ask Admissions</td></tr><tr><td>00001159</td><td>Erin Hasenroth</td><td>500451200</td><td></td><td>New</td><td>Phone</td><td>Telecounseling</td><td>3/12/2020 8:01 AM</td><td>Erin Howard</td></tr><tr><td>00001178</td><td>Calfee Chesl</td><td>500451401</td><td>hs counselor request</td><td>Closed</td><td>Internal</td><td>Undergraduate Admissions</td><td>3/17/2020 12:38 PM</td><td>Ask A Buckeye</td></tr><tr><td>00001185</td><td>Katie Shultz</td><td></td><td></td><td>New</td><td>Internal</td><td>Admissions Counselors</td><td>3/18/2020 8:38 AM</td><td>Ask Admissions</td></tr><tr><td>00001184</td><td>Katie Shultz</td><td></td><td></td><td>Assigned</td><td>Phone</td><td>Undergraduate Admissions</td><td>3/18/2020 8:36 AM</td><td>Erin Howard</td></tr><tr><td>00001107</td><td>Terrence Jamod Franks</td><td>500454293</td><td>checking settings</td><td>New</td><td>askabuckeye@osu.edu</td><td>Undergraduate Admissions</td><td>3/10/2020 9:34 AM</td><td>Ask A Buckeye</td></tr><tr><td>00001182</td><td>Terrence Jamod Franks</td><td>500454293</td><td>checking settings</td><td>Closed</td><td></td><td>UG Admissions Operations</td><td>3/17/2020 1:15 PM</td><td>Erin Howard</td></tr><tr><td>00001145</td><td></td><td></td><td>Student financial aid</td><td>Assigned</td><td>buckeyelink@osu.edu</td><td>Buckeye Link</td><td>3/10/2020 9:01 AM</td><td>Mercedes Counter</td></tr><tr><td>00001144</td><td></td><td></td><td>Campus change request</td><td>Assigned</td><td>buckeyelink@osu.edu</td><td>Buckeye Link</td><td>3/11/2020 9:01 AM</td><td>Mercedes Counter</td></tr><tr><td>00001181</td><td>John Samuel Podestri</td><td>500480607</td><td>checking settings</td><td>Assigned</td><td></td><td>UG Admissions Operations</td><td>3/17/2020 12:41 PM</td><td>Erin Howard</td></tr><tr><td>00001180</td><td>Katie Shultz</td><td></td><td>personal info update</td><td>Assigned</td><td>Internal</td><td>UG Admissions Operations</td><td>3/17/2020 12:40 PM</td><td>Erin Howard</td></tr><tr><td>00001179</td><td>Luke Jeremiah Macy</td><td>500480765</td><td>acte</td><td>New</td><td>Internal</td><td>UG Admissions Operations</td><td>3/17/2020 12:40 PM</td><td>UG Admissions Operations</td></tr><tr><td>00001177</td><td>Jennifer A Coel</td><td></td><td></td><td>Assigned</td><td>Phone</td><td>Telecounseling</td><td>3/16/2020 8:36 PM</td><td>Erin Howard</td></tr><tr><td>00001041</td><td></td><td></td><td>(#382418559) Gmail Forwarding Confirmation - Receive Mail from oustecr...</td><td>Assigned</td><td>askadmissions@osu.edu</td><td>Admissions Counselors</td><td>3/9/2020 12:22 PM</td><td>Maggie Gernardinger</td></tr><tr><td>00001175</td><td>Erika Jalae Webb</td><td>500437086</td><td>osu permission slip</td><td>Closed</td><td>bsia@osu.edu</td><td>Access & Diversity</td><td>3/16/2020 12:22 PM</td><td>BSLA</td></tr></tbody></table>	Case N.	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<p>3) You may be prompted to select what type of case you want to select. Make a choice based on who will be working the case.</p> <p>Note: Layout on case creation screen may vary based on user group.</p>	 <p>The screenshot shows the 'New Case' selection screen. It has a list of case types with radio buttons. The 'Buckeye Link' option is selected.</p> <ul style="list-style-type: none"><input checked="" type="radio"/> Buckeye Link Cases managed by Buckeye Link.<input type="radio"/> Bursar For use by OUB for cases.<input type="radio"/> FYE For use by FYE for cases.<input type="radio"/> Newark For use by Newark for cases.<input type="radio"/> Regional Cases managed by Regional Campus Undergraduate Admissions.<input type="radio"/> Registrar For use by OUR for cases.<input type="radio"/> Student Financial Aid For use for SFA related cases.<input type="radio"/> Telecounseling For use by Telecounseling for cases.<input type="radio"/> ... <p>Buttons: Cancel, Next</p>																																																																																																																																																									

<p>4) Fill out case information. Fields with asterisks (*) are required.</p> <ol style="list-style-type: none"> Contact Name: Search for contact, or add new contact (See Create Contact Job Aid). Status: Select closed if no further action is required, otherwise case will remain open. Case Origin: Inquiry Source 	<div>Case Information</div> <div> <div>Contact Name</div> <div> <input type="text" value="Search Contacts..."/> </div> </div> <div> <div>Case Owner</div> <div>Erin Howard</div> </div> <div> <div>* Status</div> <div> <input type="text" value="New"/> </div> </div> <div> <div>Case Number</div> <div></div> </div> <div> <div>* Case Origin</div> <div> <input type="text" value="--None--"/> </div> </div> <div> <div>Case Record Type</div> <div>Buckeye Link</div> </div>
<p>5) Description Information</p> <ol style="list-style-type: none"> Subject: Short summary of case content. Description: Full details of inquiry or issue. 	<div>Description Information</div> <div> <div>Subject</div> <div> <input type="text"/> </div> </div> <div> <div>Description</div> <div> <input type="text"/> </div> </div>
<p>6) Additional Information</p> <ol style="list-style-type: none"> Fill out additional fields to describe nature of case. <p>Fields that are grayed out indicate a dependency.</p> <p>Ex. What you select in type, dictates what options are populated in category, and category determines subcategory options.</p>	<div>Additional Information</div> <div> <div>Type</div> <div> <input type="text" value="--None--"/> </div> <div>View all dependencies</div> </div> <div> <div>Category ⓘ</div> <div> <input type="text" value="--None--"/> </div> <div>View all dependencies</div> </div> <div> <div>Subcategory ⓘ</div> <div> <input type="text" value="--None--"/> </div> <div>View all dependencies</div> </div>
<p>7) System Information – No information needs to be supplied in this section.</p>	<div>System Information</div> <div> <div>Parent Case</div> <div>Web Email</div> </div>

<p>8) Save case.</p> <ul style="list-style-type: none">a. If case is intended to be worked by another group, check assignment rule and case owner will be updated to other team upon saving.b. Save to create case.	<div><div><div>A</div><div><input type="checkbox"/> Assign using active assignment rule</div></div><div><div>Cancel</div><div>Save & New</div><div><div>B</div><div>Save</div></div></div></div>
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