

## WORKING WITH CASES

When Salesforce users open a Case that is associated with a Contact, the Case opens as a subtab of the Contact.

The screenshot displays a Salesforce interface for a Case record (Case 00001272). The interface is divided into three main panes. The left pane, titled 'Case Information', contains fields for OSU ID (700000000), Case Owner (Buckeye Link), Created By (System, 3/5/2020 11:53 AM), Contact Name (Mercedes Canter), Date/Time Opened (3/5/2020 11:53 AM), Status (New), Case Origin (buckeyelink@osu.edu), Case Record Type (Buckeye Link), Subject (Application help), and Description (I have questions about filling out my application and submitting it. Can you help me?). Below this is the 'Additional Information' section with fields for Type (Buckeye Link), Category, and Subcategory. The middle pane, titled 'Feed', shows a 'Related Cases' section with a 'Share an update...' button and a search bar. Below this is the 'Most Recent Activity' section, which includes a list of updates: 'System Case created' (8m ago) and 'Mercedes I have questions about filling out my application and submitting it. Can you help me?Thanks!' (8m ago). The right pane, titled 'Contact Details', shows the contact information for Mercedes Canter, including Name, Title, Account Name (Canter (Mercedes) Administrative Account), Email (mercedes.couter.4@gmail.com), and Phone. Below this is the 'General' section with a 'Files (0)' section and an 'Additional Contacts Referenced (0)' section.

### Case Information

For cases that originate via inbound email, the Subject field is populated by the email's subject, and the Description field contains the body of the inbound email

### Additional Information

- Type – for cases that originate via inbound email, Type is defined by the address the email was sent to
- Category
- Subcategory

The middle pane is where Salesforce users will take action on cases, and view case updates. Read on for more details!

### Contact

Details about the Contact associated with the Case.

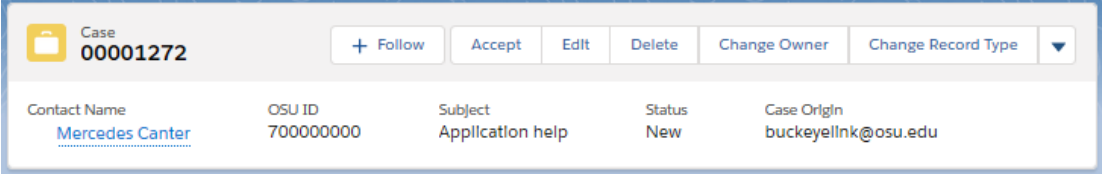
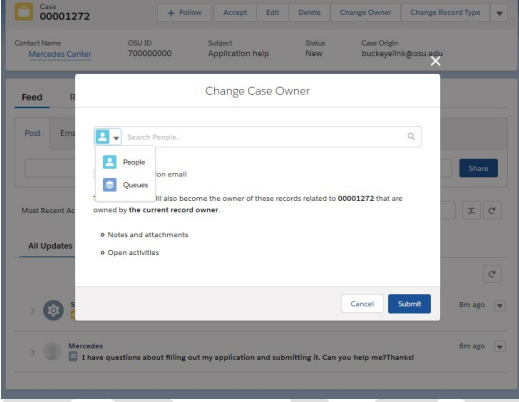
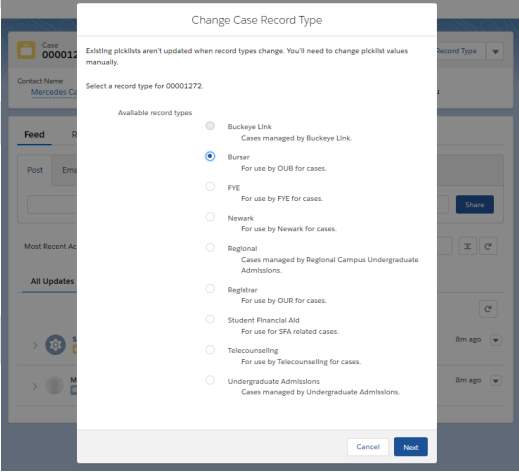
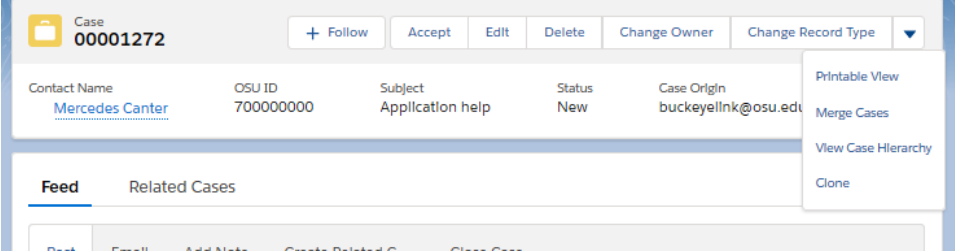
### General > File

If the inbound email contains an attachment, it will appear here

**History** is covered below

### Additional Contacts

Referenced  
If more than one Contact is associated with the Case, that Contact would appear here

| Step-by-Step  | Screen   |
|---|--|
| <p>The <b>Case Number</b> is at the top left</p> <p><b>Follow</b> – Click to receive notifications on all Case updates</p> <p><b>Accept</b> – Click to accept the Case</p> <p><b>Edit</b> – Click for a different view for editing case details</p> <p><b>Delete</b> – Select staff will have access to delete cases.</p> |    |
| <p><b>Change Owner</b></p> <p>Click to reassign the Case to another Salesforce user or queue</p> <p>A separate job aid is available with additional details</p>   |    |
| <p><b>Change Record Type</b></p> <p>This option may not be available if you primarily work with one type of case.</p>   |   |
| <p>Click the down arrow at the far right for additional options</p> <p>Printable View</p> <p>Merge Cases (Only available if you have delete case capabilities.)</p> <p>View Case Hierarchy</p>  |  |

Clone

The Feed tab is where you can take action on the case, and also see the latest updates.

#### Actions:

#### Post

Under the Post tab, click Share an update to create a Chatter post on the Case

@ message the Salesforce user, type your message, then click Share

The screenshot shows the 'Feed' tab selected for a case. At the top, there are tabs for 'Feed' and 'Related Cases'. Below these, a horizontal bar contains buttons: 'Post', 'Email', 'Add Note', 'Create Related C...', and 'Close Case'. The 'Post' button is active. Below this bar is a text input field labeled 'Share an update...' and a blue 'Share' button. Below the input field, there is a section for 'Most Recent Activity' with a search bar and a dropdown menu. Underneath, there are tabs for 'All Updates', 'Emails', 'Call Logs', 'Text Posts', and 'Status Changes'. The 'All Updates' tab is selected. The feed shows two updates: one from 'System' with the text 'Case created' and another from 'Mercedes' with the text 'I have questions about filling out my application and submitting it. Can you help me?Thanks!'. Both updates are timestamped '8m ago'.

This screenshot shows the 'Post' tab in the Salesforce Case Feed. The 'Post' button is selected in the top bar. Below the top bar, there is a text input field for composing a message. The message content is: '@Erin Howard - can you review my draft response? thx' followed by a new line and 'Thank you for your Interest In the Ohlo State University. In order to asslst, we need to gather some additional Information. Please give us a call to discuss.' Below the text input field is a rich text editor toolbar with icons for bold, italic, underline, link, unlink, list, and other formatting options. Below the toolbar, there is a 'To' field with the text 'this case' and a blue 'Share' button. A small note at the bottom right says 'To link to a record, enter / then start typing the record name.'

## Email

Click Email to open the email editor and respond to the Contact via email

Forwarding an email is covered later this in job aid

Salesforce will automatically save a draft; users do not need to click a button to save a draft

**Note:** Other Salesforce users will not be able to view your drafts; use Chatter to share a draft message with another Salesforce user

### Feed Related Cases

Post Email Add Note Create Related C... Close Case

From: Buckeye Link <osutestcrm-buckeyelink@gmail.com>

To: mercedes.counter.4@gmail.com

Bcc: counter.4@osu.edu

Subject: Application help

THE OHIO STATE UNIVERSITY

Enter text here

The Ohio State University

Send

Standard editing tools are available

The button at the far right of the editor toolbar offers Quick Text.

You can add frequently used plain text phrases to utilize in email messages. They will not be shared with others.

The buttons at the bottom left pane offer the following functionality:

- Add an attachment
- Insert merge field
- Work with a template
- Preview the email
- Pop out the view
- Discard the email draft



## Add Note

Click to make a note about an action you have taken on the Case

Select the subject from these options

- Counseling
- Email
- Front Desk
- Note
- Outreach
- Phone

Write your note in the Description field

### Feed Related Cases

Post Email Add Note Close Case New Task

Related To 00001183

Subject  
Note

\*Description

Save

### Feed Related Cases

Post Email Add Note Close Case New Task

Related To 00001183

Subject  
Note

--None--

Note

Phone

Outreach

Front Desk

Counseling

Email

Click Close Case to close a Case

Select a Category then a Subcategory to indicate what the Case was about

Note: subcategories are dependent on your Category select

Click Save to close the Case

### Feed Related Cases

Post Email Add Note Close Case New Task

\*Status  
Closed

Contact Name  
Eve Polastrl

Type  
UG Admissions Operations

Category  
Test Scores

Subcategory  
ACT

Save

## New Task

Users have the ability to add a task and set a future due date to remind themselves to take action on a case.

The screenshot shows the 'New Task' form within a case management interface. At the top, there are tabs for 'Feed' and 'Related Cases'. Below the tabs is a horizontal menu with options: 'Post', 'Email', 'Add Note', 'Close Case', and 'New Task' (which is highlighted). The form contains several input fields: a 'Due Date' field with a calendar icon, a 'Subject' field with a search icon, and a 'Comments' text area. On the right side, there are dropdown menus for 'Status' (set to 'Not Started') and 'Assigned To' (set to 'Maggie Gerhardinger'). Below these, there is a 'Related To' field with the value '00001183'. A 'Save' button is located at the bottom right of the form.

## All Updates

This tab is a running list of Case updates

Individual updates can be expanded/collapsed to view greater/less detail

The screenshot shows the 'All Updates' feed within a case management interface. At the top, there are tabs for 'Feed' and 'Related Cases'. Below the tabs is a horizontal menu with options: 'Post', 'Email', 'Add Note', 'Create Related C...', and 'Close Case'. Below the menu is a 'Share an update...' text input field and a 'Share' button. Below this is a search bar labeled 'Search this feed...' and a 'Most Recent Activity' dropdown menu. Below the search bar is a horizontal menu with options: 'All Updates' (highlighted), 'Emails', 'Text Posts', and 'Status Changes'. Below the menu is a list of updates from 'Mercedes Counter'. Each update includes a timestamp, a status icon, and a description. The updates are: 'Phone created' (48m ago), 'To: Internal' (56m ago), 'Case status updated' (1h ago), and 'Case updated' (1h ago). Each update has a 'Comment' button and a dropdown arrow for expansion/collapse.

## Emails

To view only email activity, click Emails

**Note:** users who need to forward an email should do so from Emails tab

The name that appears at the top of each inbound email is based on the Contact's personal email configuration

Selecting Reply, Reply All, and Forward will launch the Email tab

Comment opens Chatter

**Feed**   Related Cases

**Post**   Email   Add Note   Create Related C...   Close Case

Share an update...

Share

Most Recent Activity ▾

🔍 Search this feed...

🔧 ⌵

All Updates   **Emails**   Text Posts   Status Changes



**Megan**

To: osutestcrm-buckeyellink ⓘ

Did you get my transcript?

Megan Canter

↩ Reply   ↩ Reply All   → Forward   💬 Comment

Just now ▾

**Feed**   Related Cases

**Post**   Email   Add Note   Create Related C...   Close Case

Share an update...

Share

Most Recent Activity ▾

🔍 Search this feed...

🔧 ⌵

All Updates   Emails   **Text Posts**   Status Changes



**Mercedes Counter**

To: Internal

@Erlin Howard - can you review my draft response? thx

Thank you for your Interest In the Ohio State University. In order to assist, we need to gather some additional information. Please give us a call to discuss.

💬 Comment

20m ago ▾

## Status Changes

Click to isolate Status activity on the Case

**Feed**   Related Cases

[Post](#)   [Email](#)   [Add Note](#)   [Close Case](#)   [New Task](#)

[Share](#)

Most Recent Activity ▾  [⌵](#) [↻](#)

[All Updates](#)   [Emails](#)   [Text Posts](#)   **[Status Changes](#)**

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[↻](#)

Mercedes Counter [⌵](#) [🔒](#) Case closed Just now ▾

[🗨](#) Comment

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Mercedes Counter [⌵](#) [🔒](#) Case status updated Just now ▾

Status: New to Assigned

[🗨](#) Comment

## Related Cases

The Related Cases tab will show cases that are linked to the record you are reviewing.

More information on this functionality will be released in June 2020.

**Feed**   **Related Cases**

[🔒](#) **Related Cases (1)** [⚙](#) [↻](#) [New](#)

1 item • Sorted by Date/Time Opened • Updated a few seconds ago

|   | Case                     | Subject                           | Priority | Date/Time Opened   | Status   | Owner                       |   |
|---|--------------------------|-----------------------------------|----------|--------------------|----------|-----------------------------|---|
| 1 | <a href="#">00001181</a> | <a href="#">checking settings</a> | Medium   | 3/17/2020 12:41 PM | Assigned | <a href="#">Erin Howard</a> | ▾ |

[View All](#)



## General > Files

Inbound email attachments appear here

Click the link to preview the attachment

Additional actions are available from the preview window

GeneralHistory

Files (1)

Letter of Recommendation

Mar 5, 2020 • 184KB • pdf

View All

Letter of Recommendation

DownloadSharePublic Link

View File Details

Upload New Version

Edit File Details

Delete

Letter of Recommendation

Page 1 of 1

javascript:void(0);

## General > Additional Case Contacts

### Add an additional Contact to the Case

In the right pane, users are able to add an additional Salesforce Contact to a Case. Perhaps you want to note a parent or guidance counselor contacted OSU on behalf of a child/student

Click the down arrow to the right of Additional Contacts Referenced

In the next window, search for the Salesforce Contact. As you begin to type, Salesforce will return matches. If the Contact does not exist in Salesforce, you have the option to create the Contact

The screenshot shows the Salesforce interface for adding additional contacts to a case. At the top, a header bar displays 'Additional Contacts Referenced (0)' with a dropdown arrow. Below this, a navigation bar shows 'Outreach & Recrui...' and 'Cases' tabs. The main content area is titled 'New Additional Case Contacts' and contains an 'Information' section. Under 'Additional Case Contacts', there are two fields: '\* Case' and '\* Contact'. The '\* Case' field contains the value '00001272' and a close button. The '\* Contact' field is a search bar labeled 'Search Contacts...' with a magnifying glass icon. At the bottom of the dialog, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

## History

Activity History shows similar information to the Case Feed, but focuses in on Notes, Interactions, and Emails.

Control how much detail you see by clicking Expand All/Collapse All.

Under the Activity History is the Case History, which tracks changes to different fields on the case.

The screenshot displays the 'History' tab of a software interface. It is divided into two main sections: 'Activity History' and 'Case History'.

**Activity History:**

- Filters:** All time • All activities • All types (with a dropdown arrow).
- Actions:** Refresh • Expand All • View All.
- Upcoming & Overdue:** No next steps. To get things moving, add a task or set up a meeting.
- March • 2020:** This Month.
- Activities:**
  - Note:** 9:37 PM | Today. You had an event with [John Samuel Podlesnik](#).
  - checking settings:** 9:37 PM | Today. osutestcrm+mansfield@gmail.com sent an email to howard.1...
- Footer:** No more past activities to load.

**Case History (3):**

|                 |                             |
|-----------------|-----------------------------|
| Date:           | 3/10/2020 2:29 PM           |
| Field:          | Contact Name                |
| User:           | <a href="#">Erin Howard</a> |
| Original Value: |                             |
| New Value:      | John Podlesnik              |
| Date:           | 3/10/2020 9:35 AM           |
| Field:          | Created.                    |
| User:           | <a href="#">System</a>      |
| Original Value: |                             |
| New Value:      |                             |
| Date:           | 3/10/2020 9:35 AM           |
| Field:          | Type                        |
| User:           | <a href="#">System</a>      |
| Original Value: |                             |
| New Value:      | Admissions Counselors       |

[View All](#)

|  |  |
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|  |  |
|--|--|

DRAFT