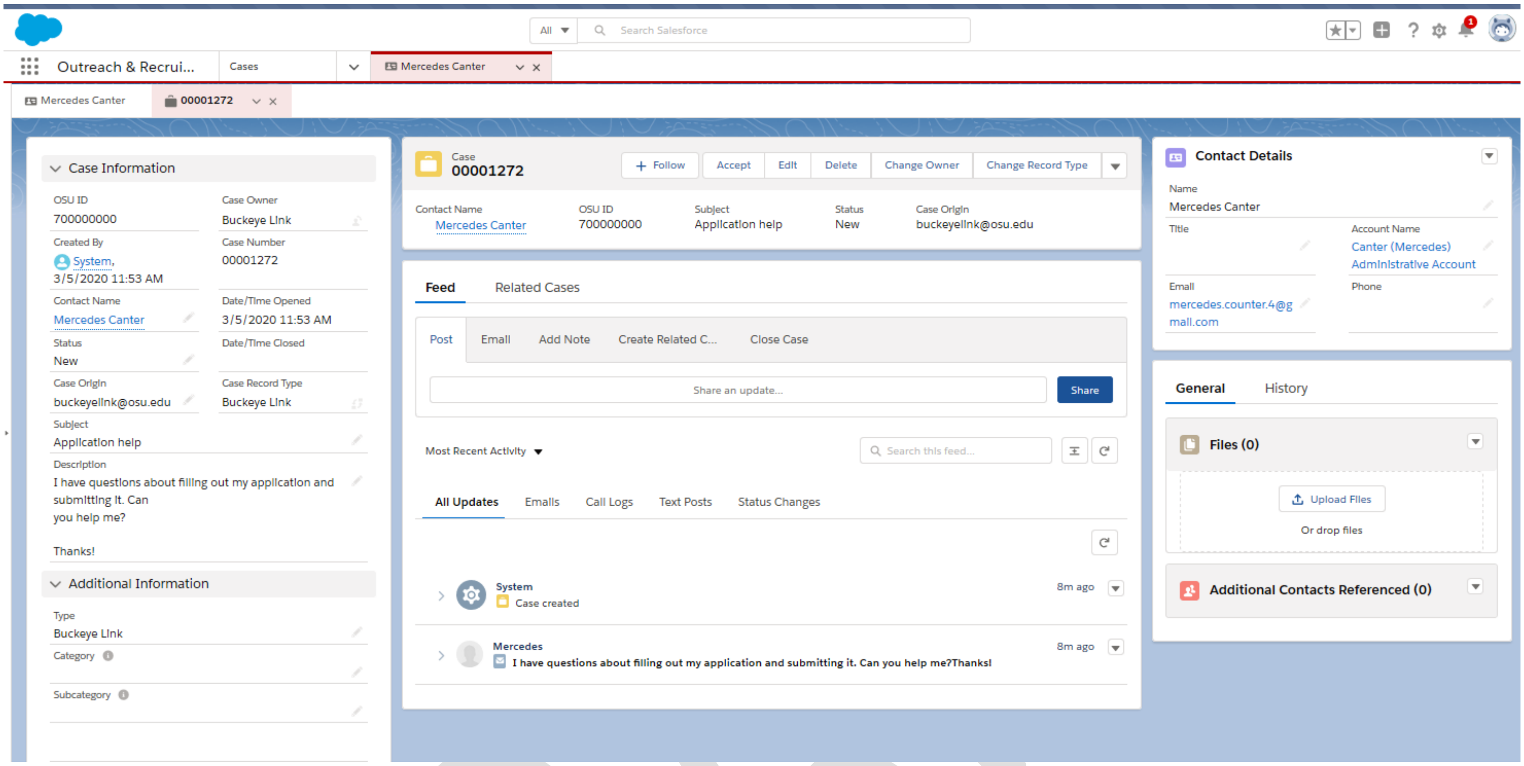
## WORKING WITH CASES

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




**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

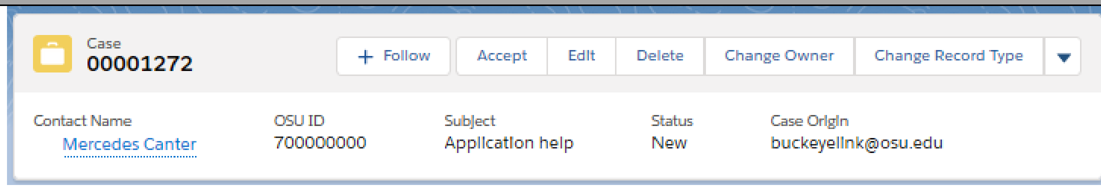
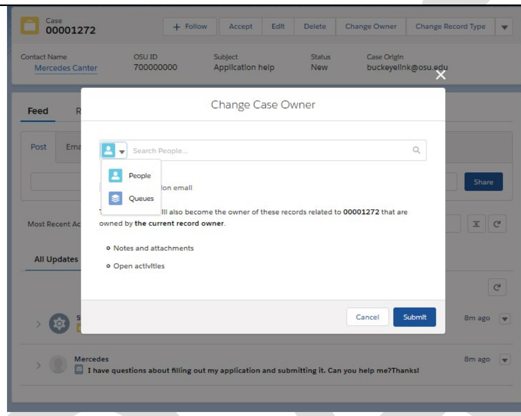
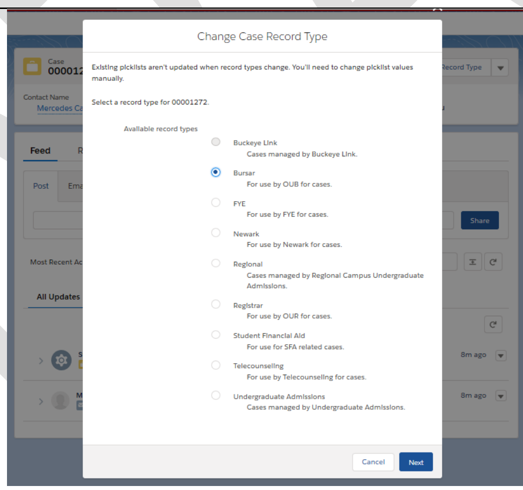
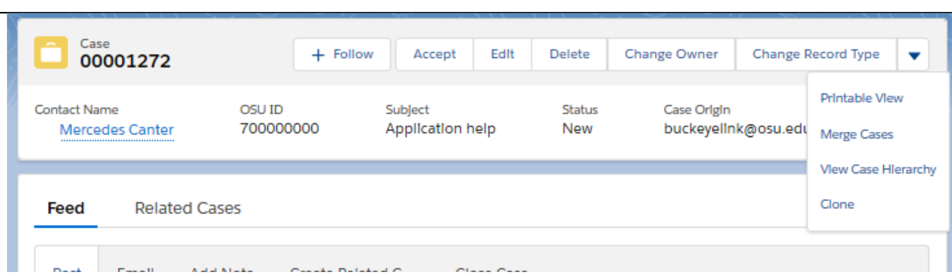
The middle pane is where Salesforce users will take action on cases, and view case updates. Read on for more details!

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

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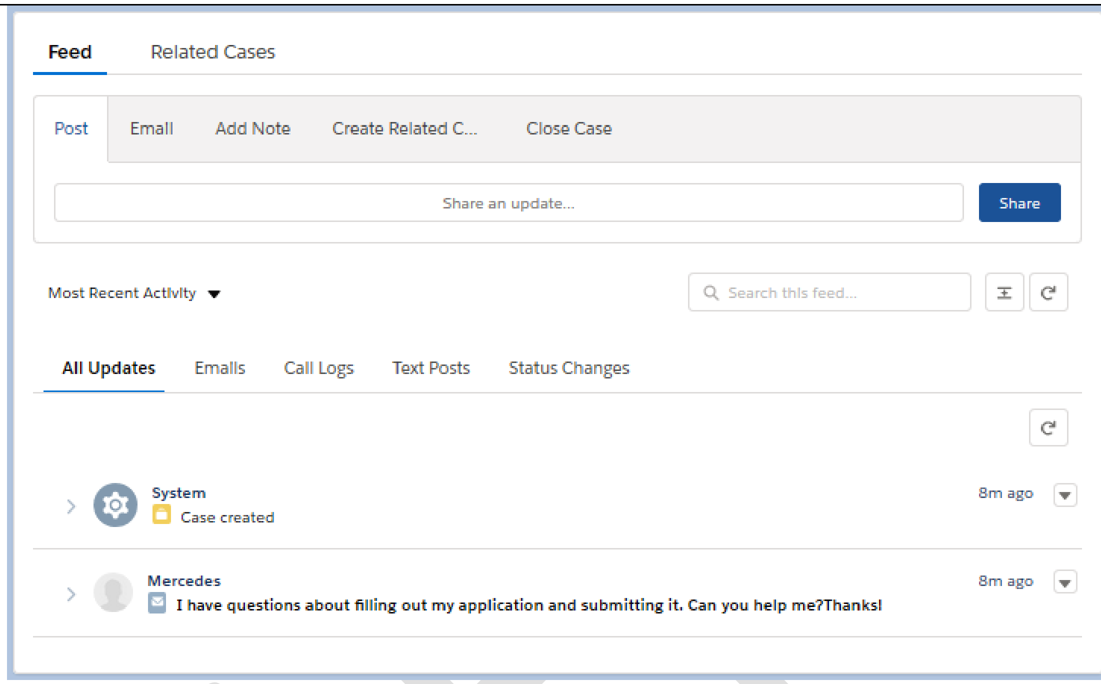
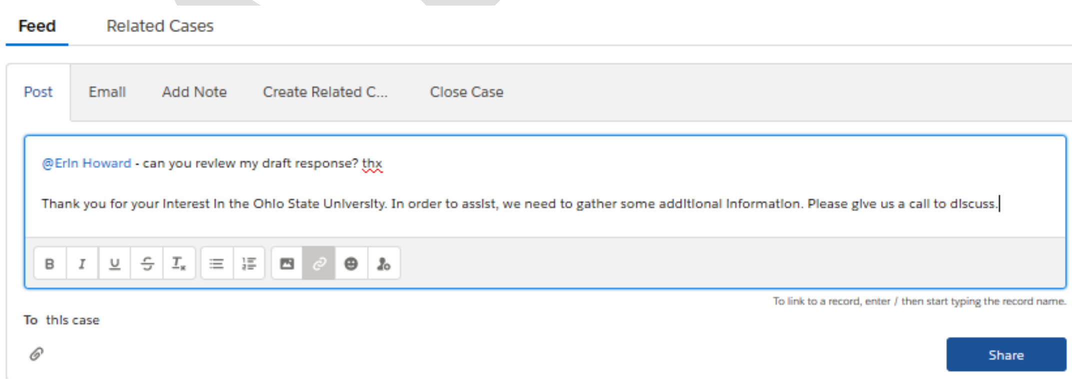
| Clone | |
| **The Feed tab is where you can take action on the case, and also see the latest updates.**<br><br>**Actions:**<br><br>**Post**<br><br>Under the Post tab, click Share an update to create a Chatter post on the Case<br><br>@ message the Salesforce user, type your message, then click Share |  |

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**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

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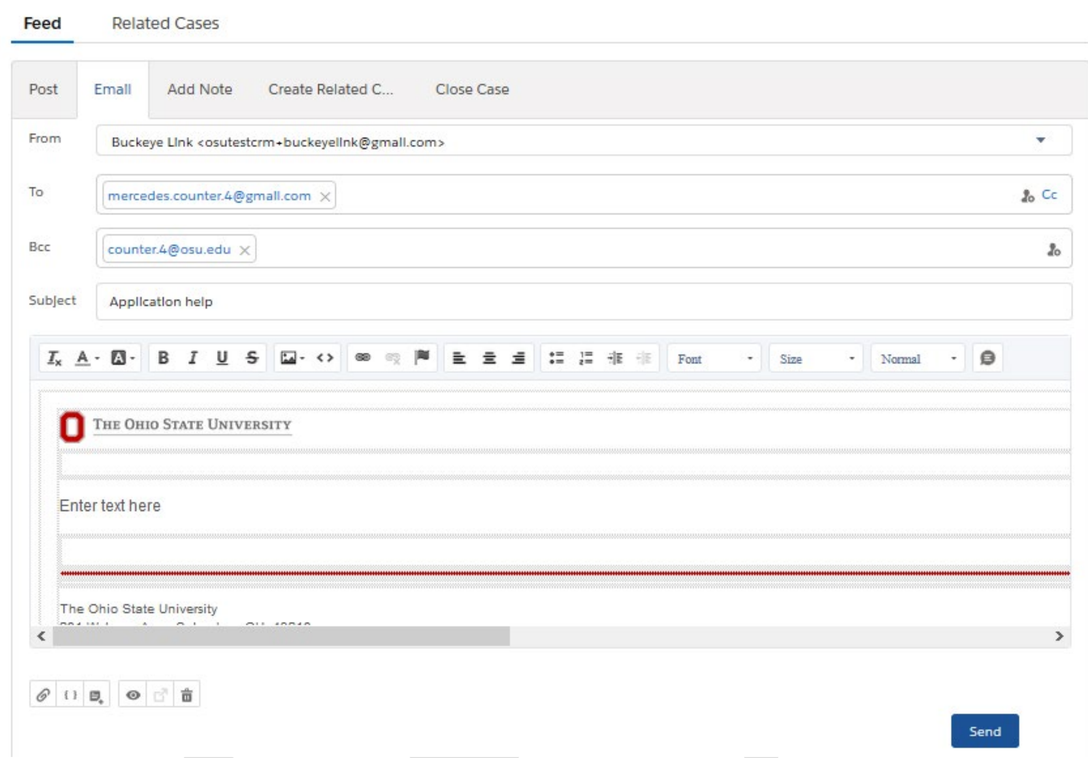


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Standard editing tools are available

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.

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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

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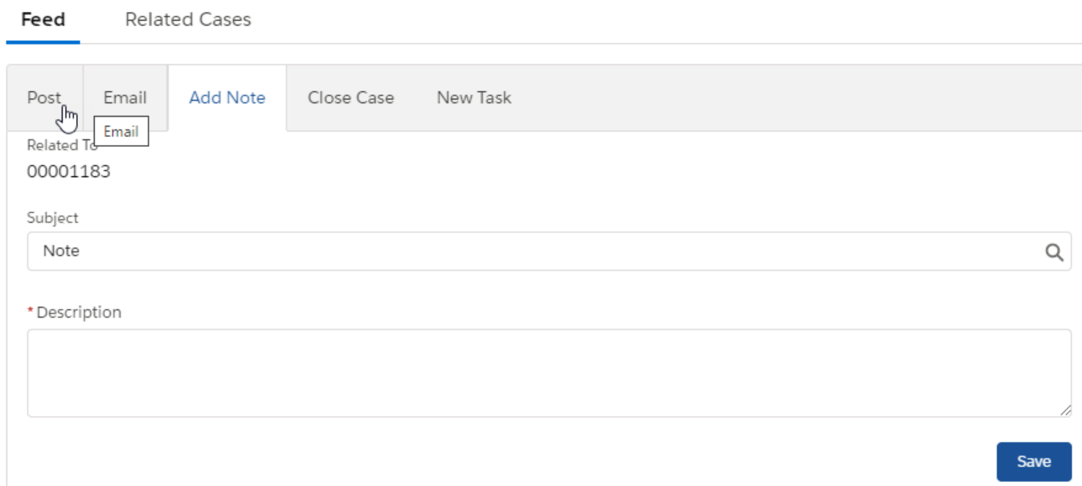
## Add Note

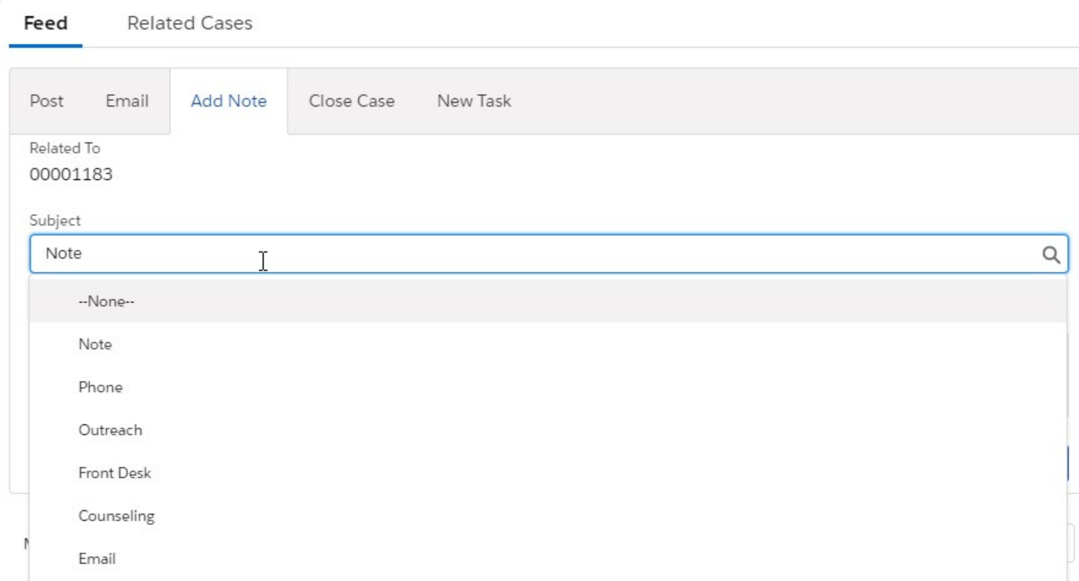
Click to make a note about an action you have taken on the Case

Select the subject from these options

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

Write your note in the Description field



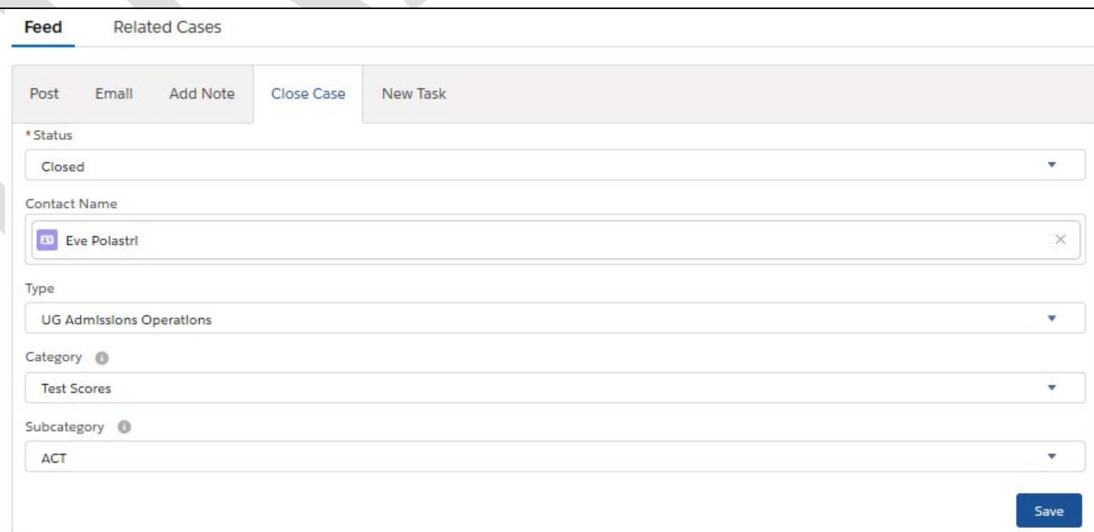




Click Close Case to close a Case

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

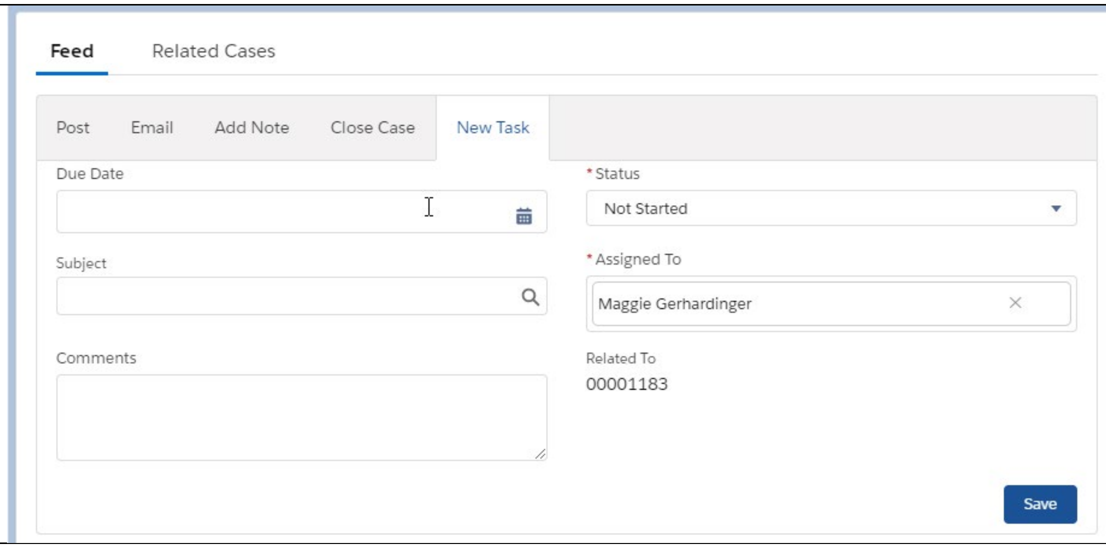
Note: subcategories are dependent on your Category select

Click Save to close the Case



**New Task**

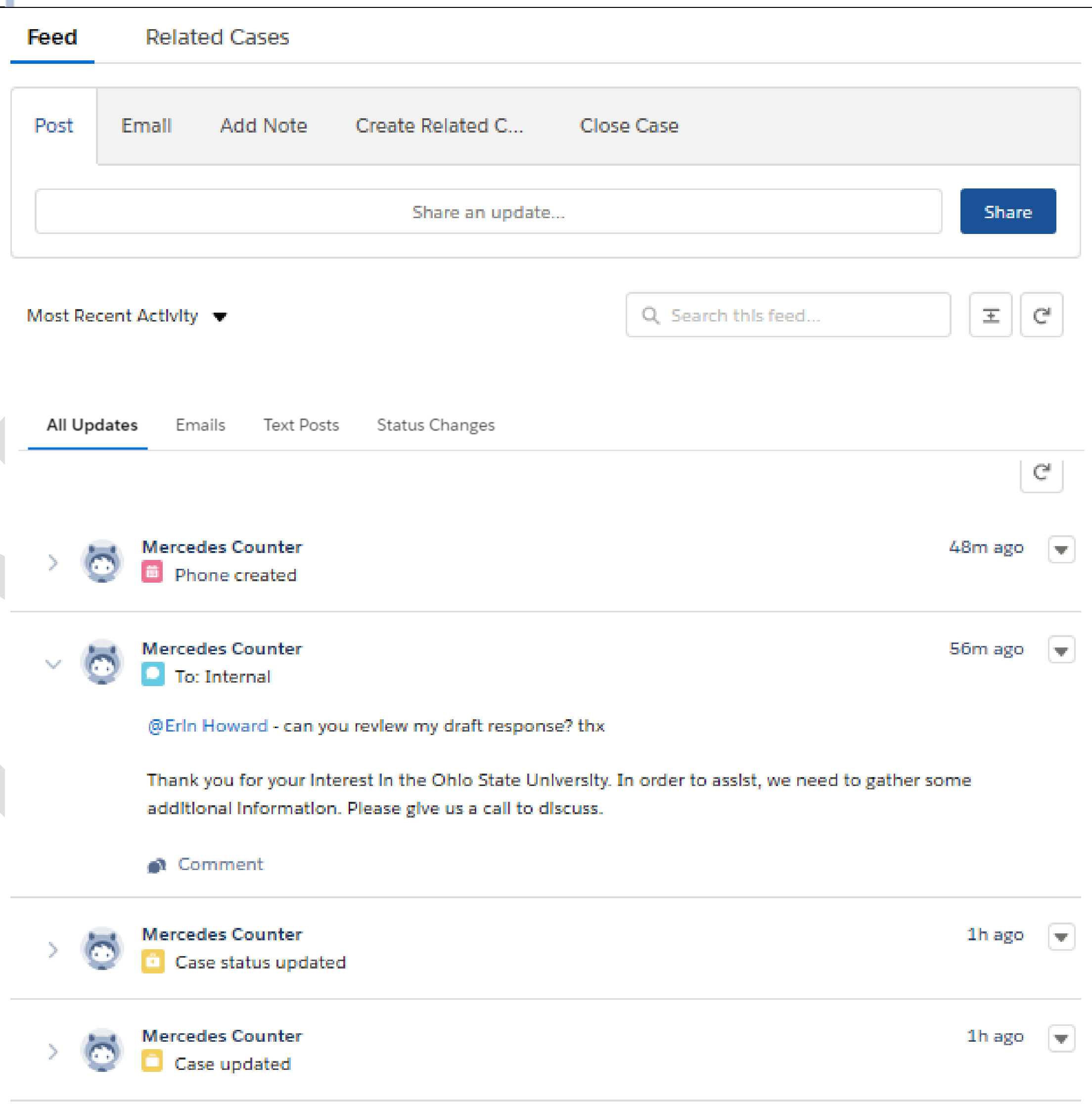
Users have the ability to add a task and set a future due date to remind themselves to take action on a case.




**All Updates**

This tab is a running list of Case updates

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



**Emails**

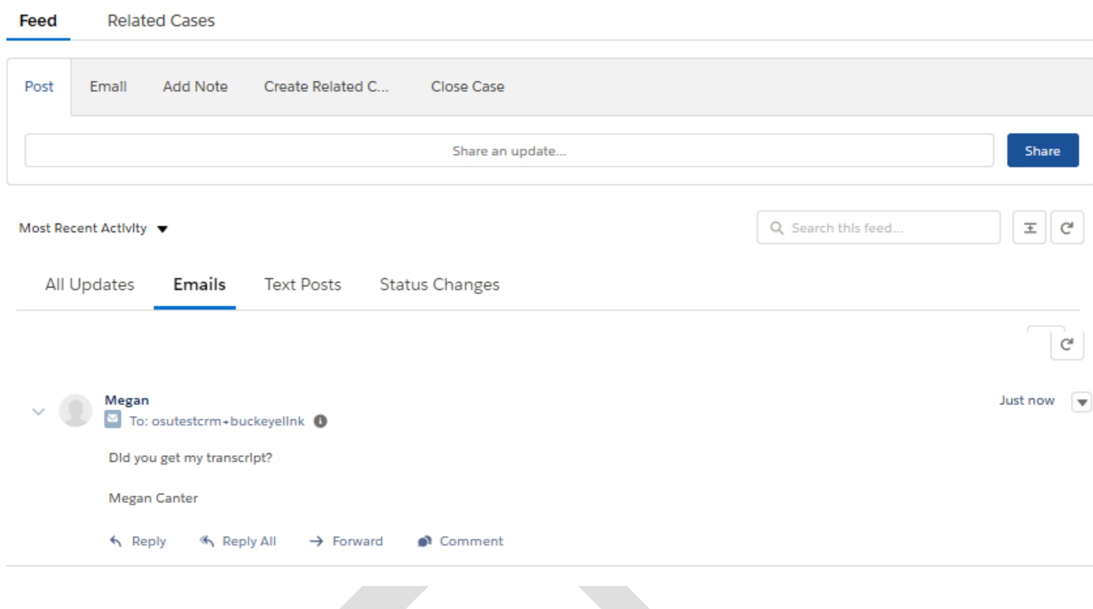
To view only email activity, click Emails

**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

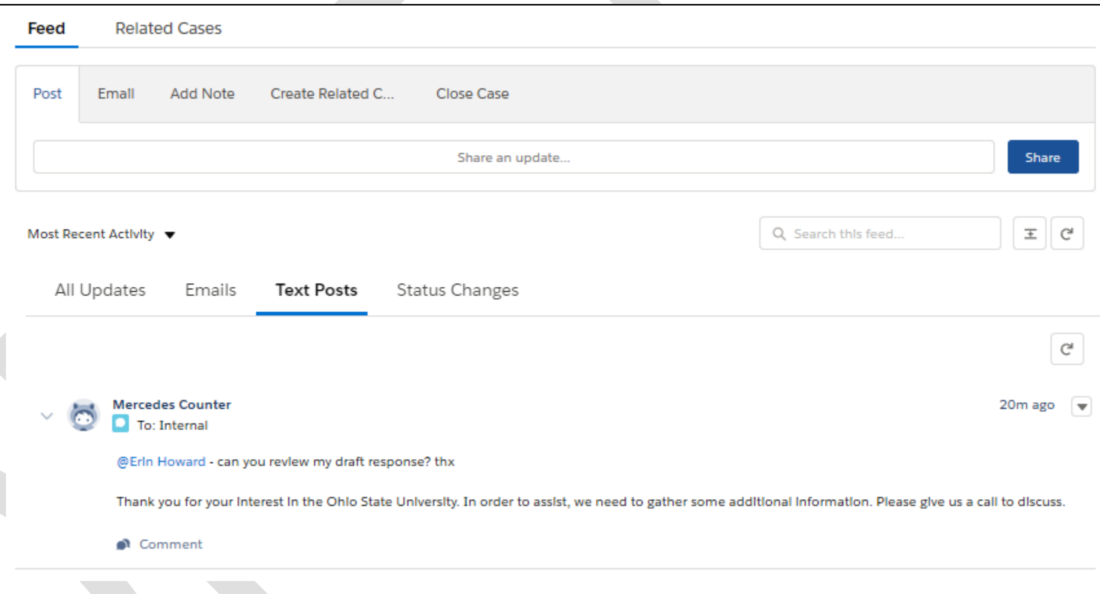
Selecting Reply, Reply All, and Forward will launch the Email tab

Comment opens Chatter



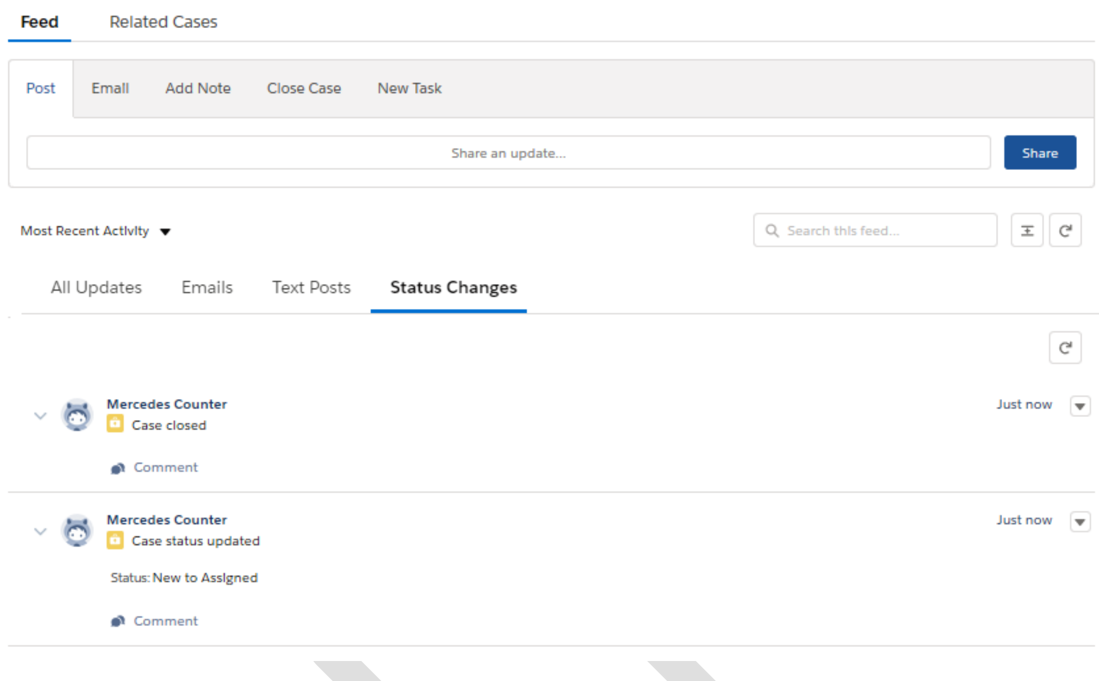

**Text Posts**

Click to isolate Chatter activity on the Case



**Status Changes**

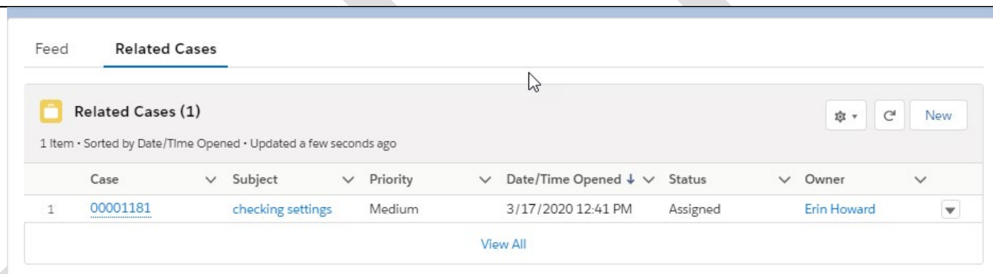
Click to isolate Status activity on the Case




**Related Cases**

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

More information on this functionality will released in June 2020.



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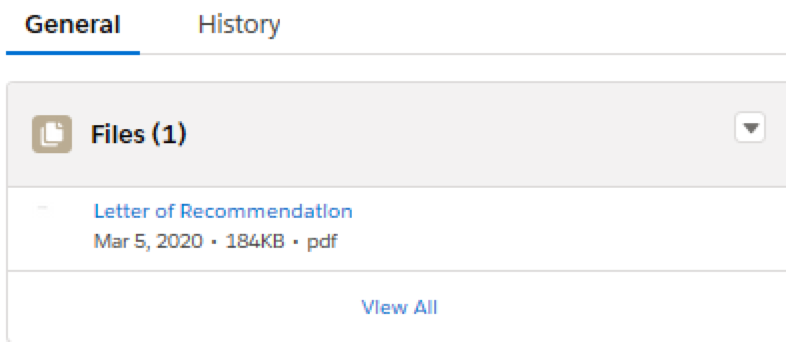
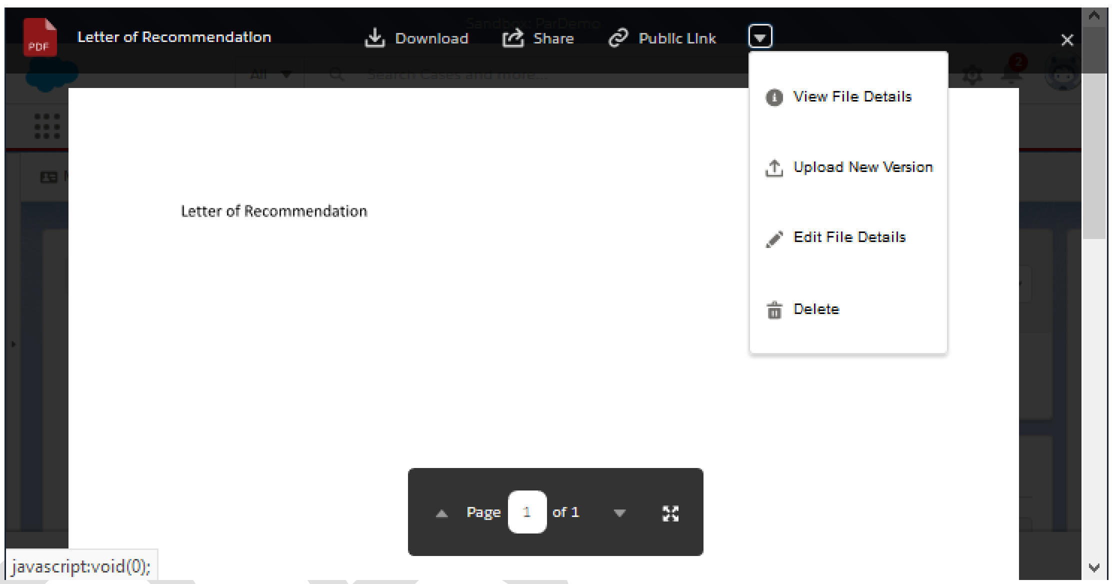
| **General > Files**<br><br>Inbound email attachments appear here<br><br>Click the link to preview the attachment |  |
| Additional actions are available from the preview window |  |

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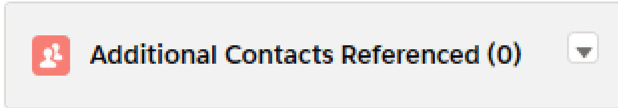
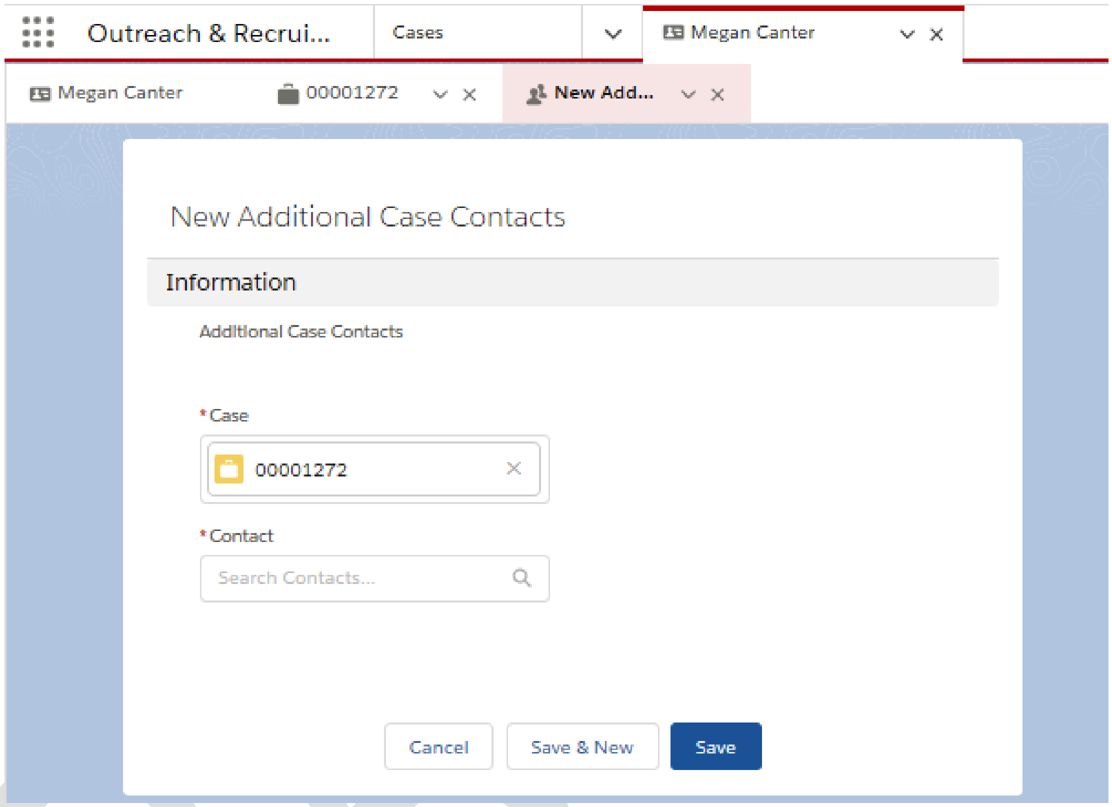
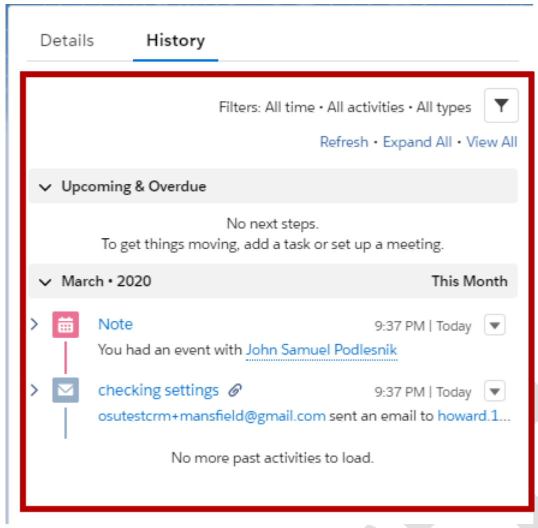
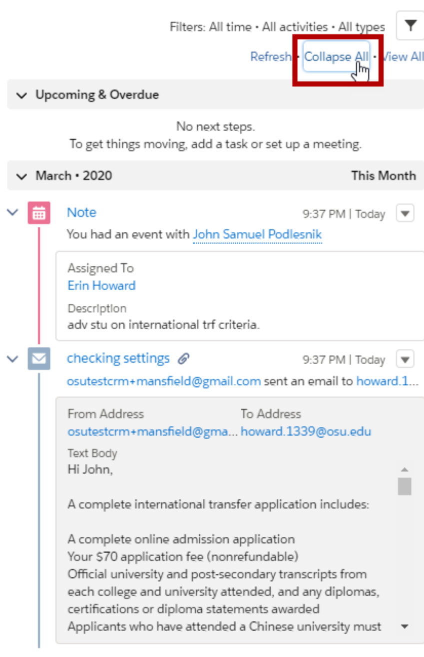
| **General > Additional Case Contacts**<br><br>**Add an additional Contact to the Case**<br><br>In the right pane, users are able to add an additional Salesforce Contact to a Case. Perhaps you want to note a parent or guidance counselor contacted OSU on behalf of a child/student<br><br>Click the down arrow to the right of Additional Contacts Referenced<br><br>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 | <br> |

## History

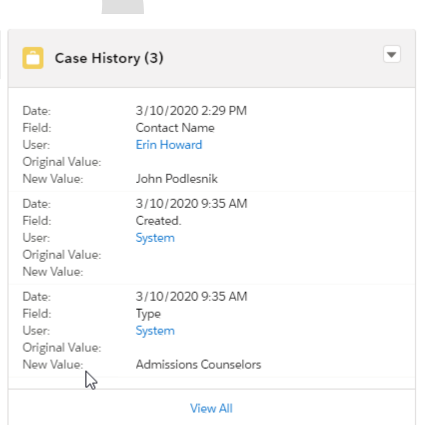
Activity History shows similar information to the Case Feed, but focuses in on Notes, Interactions, and Emails.




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.



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