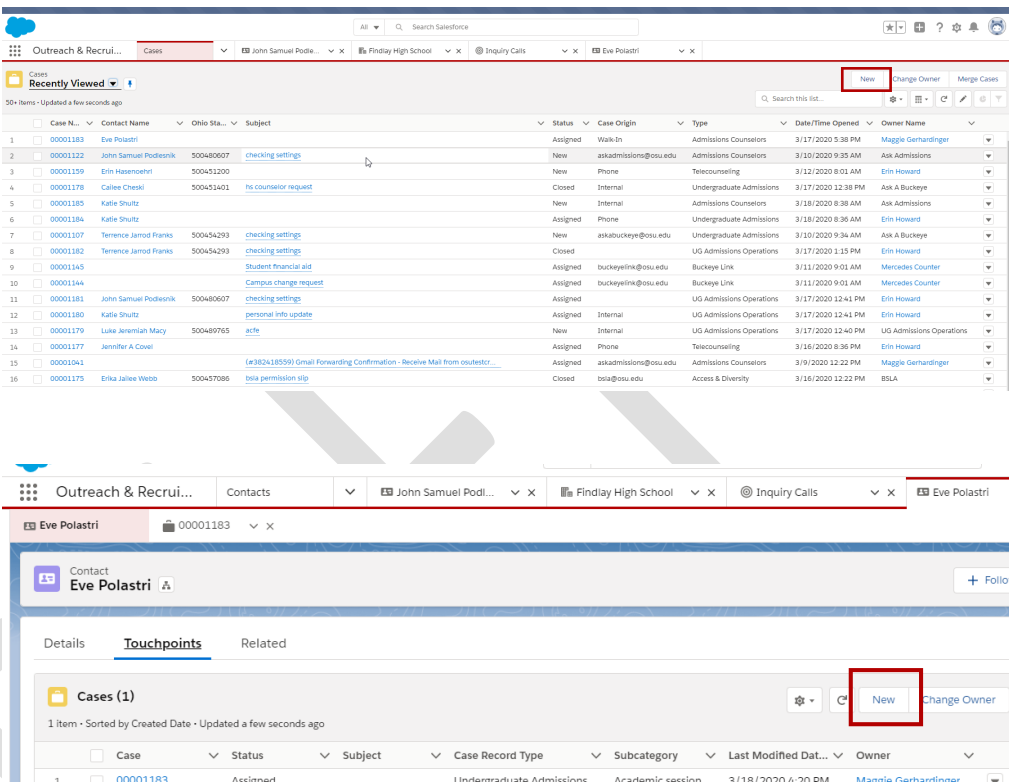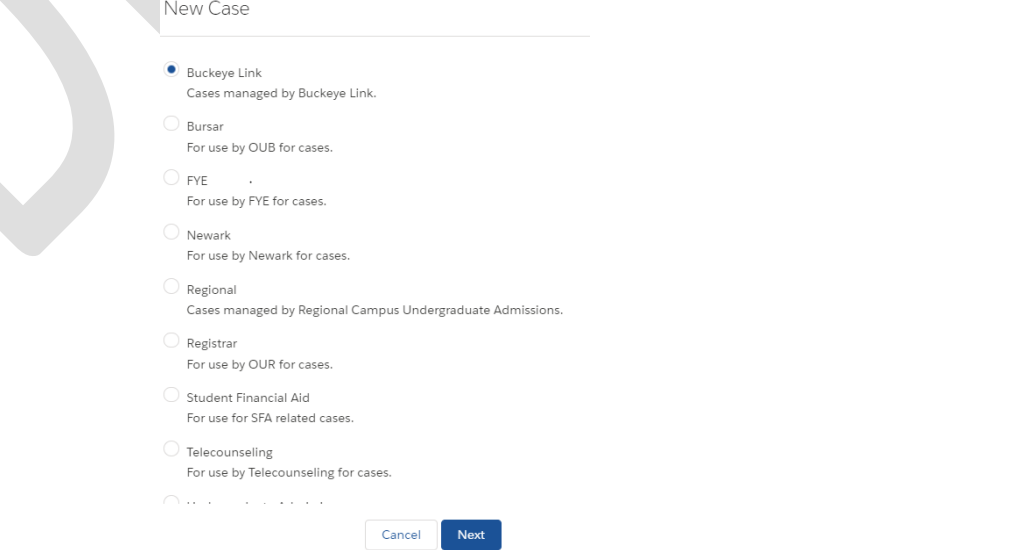# CREATING A CASE

Step-by-Step	Screen

Case creation can be initiated in multiple places within Salesforce.
 	
1) From any Case List View
   a. Click "New" Button in the Actions Bar
 	
2) From a Contact
   a. Navigate to view a contact's cases under the "Touchpoints" tab
   b. Click "New Button in the Actions Bar	

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. **Note: Layout on case creation screen may vary based on user group.**	

4) Fill out case information. Fields with asterisks (*) are required.
 	
    a. **Contact Name**: Search for contact, or add new contact (See Create Contact Job Aid).
 	
    b. **Status**: Select closed if no further action is required, otherwise case will remain open.
 	
    c. **Case Origin**: Inquiry Source
	Case Information
	
	Contact Name Case Owner
	
	[Search Contacts... 🔍] Erin Howard
	
	*Status Case Number
	
	[New ▼]
	
	*Case Origin Case Record Type
	
	[--None-- ▼] Buckeye Link

5) Description Information
 	
    a. **Subject**: Short summary of case content.
 	
    b. **Description**: Full details of inquiry or issue.
	Description Information
	
	Subject
	
	[ ]
	
	Description
	
	[ ]

6) Additional Information a. Fill out additional fields to describe nature of case. Fields that are grayed out indicate a dependency. Ex. What you select in type, dictates what options are populated in category, and category determines subcategory options.	**Additional Information** Type [--None-- ▼] View all dependencies Category ⓘ [--None-- ▼] View all dependencies Subcategory ⓘ [--None-- ▼] View all dependencies
7) System Information – No information needs to be supplied in this section.	**System Information** Parent Case Web Email

8) Save case. 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.	A ☐ Assign using active assignment rule Cancel Save & New **Save** B