Buckeye Link Email Contact-to-Case Flow

Customer emails

- The email creates a case.
- If the customer's email address is associated with a Salesforce contact record, the case is automatically associated with the contact record.
- The customer may be the student or may be someone related to a student, such as a parent.

Review the case/inquiry

- If the contact is not set to the student, edit the contact field and set the contact to the student.
- If no contact record exists for the student, create the contact record.
- If the inquiry is from someone related to the student, such as a parent, list the contact in the "additional contacts referenced" section of the case.

Review SIS

- If the student is an applicant, current, or former student, look up the account in SIS and research the inquiry.
- Determine if FERPA applies, check for student groups, special populations, etc.

Review the contact record

- Check the student's contact record for the 'refer to staff' notation and any other relevant information.
- Review previous cases. If the inquiry is in reference to a prior topic/conversation, open the previous case topic and review the case activity.
- If applicable, merge the emailed case with the prior case.

Respond to the inquiry

- Only release account-specific details to the customer if we are authorized based on FERPA guidelines, regardless of any relationships set within Salesforce.
- Follow-up directly with the student as necessary within the same case.
- When sending an email, include the following:
  - The previous email is quoted.
  - The OSU logo and signature templates.
  - A greeting and a closing.

Case documentation

- A summary of your email is not required as the email serves as the documentation of the case.
- Use the 'Add Note' option if you are documenting additional actions taken on a case, such as a phone call, or if you submitted a revision/action request.

Additional case actions

- When applicable, collaborate with other Salesforce users/groups through posts/comments (chatter).
- If follow-up is required, set the case status to pending. Create a new task associated with the case to schedule a reminder to follow-up.
- If no further action is required, set the case status to closed.
- When closing a case, select the appropriate category, subcategory, and opportunties related to the inquiry.