

Salesforce Training Worksheet

Name: _____

Use the Salesforce Beyond the Basics Module and the [Salesforce Training Resources Wiki](#) to complete this worksheet.

Question	Answer
1. Did you set your Title in your personal settings?	
2. Did you set your default email address to Buckeye Link (Buckeyelink@osu.edu) in your personal settings?	
3. Use the Global Search to find Aaron James Poth's contact record. How many cases are on his record? Aaron sent an email titled "Fall Tuition Bill," when was this email sent to us? Who is the case owner?	
4. Use the Global Search to find the contact record for student ID: 500335473. Do you see any relationships set between this contact and any others? If so, what is the related contact's name and what is the relationship?	
5. Find Penny Ann Carver's (500120658) contact record. Which high school are they affiliated with?	
6. What does the note (added on September 18, 2020) on case number 00109156 say?	

7. Use the global search to find a contact record for student ID: 500528589. What is their name?	
8. When did we receive Audra Meadow's ACT score? What was the score?	
9. Navigate to case number 00109437. How many files are attached? What is the name of the file? Are there any additional contacts referenced on this case?	
10. When creating a case to document a call you received, what case record type should you choose?	
11. When should you add a note instead of creating a new case?	
12. Describe a scenario in which you will need to merge two cases together.	
13. What is a Related Case?	
14. How do you create a related case?	