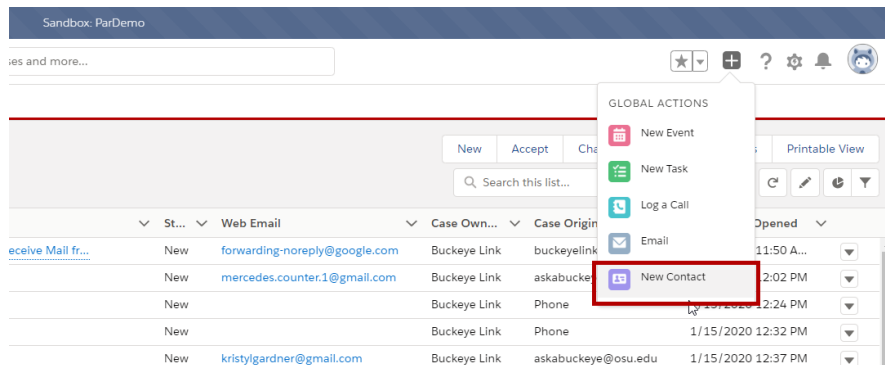
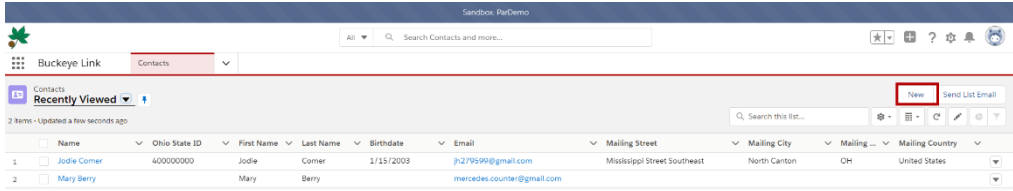
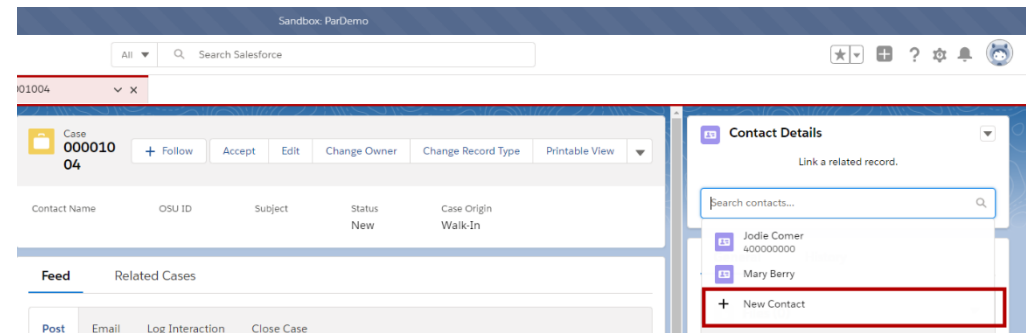
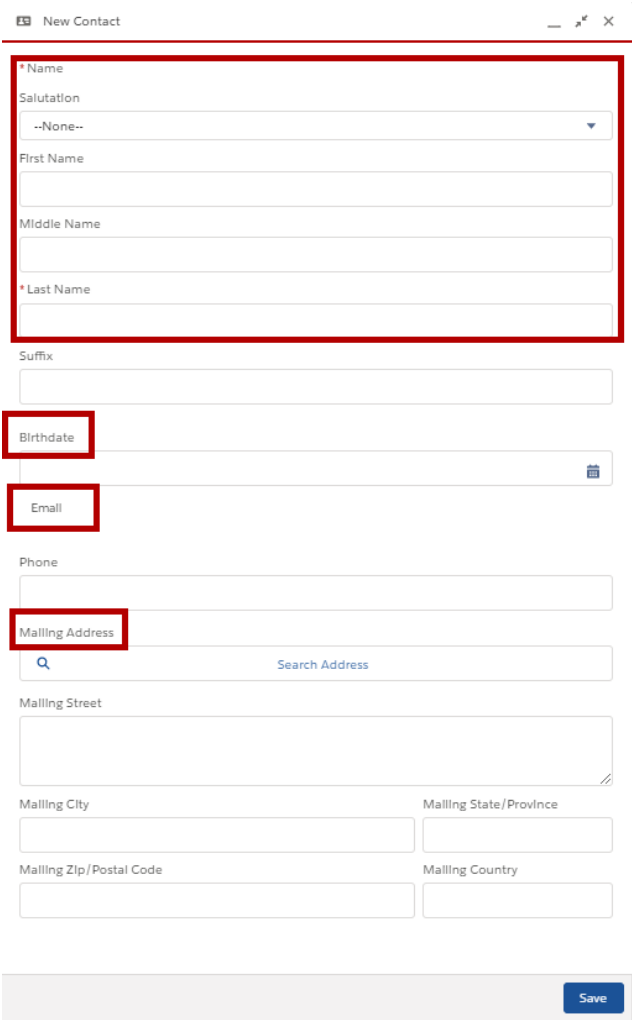
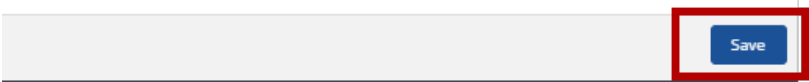


CREATING A CONTACT

Step-by-Step	Screen
<p>Contact creation can be initiated from multiple places:</p> <p>1) Global Action button in top-right corner of every page.</p>	 <p>This screenshot shows the top-right corner of the Salesforce interface. A dropdown menu titled 'GLOBAL ACTIONS' is open, displaying options: 'New Event', 'New Task', 'Log a Call', 'Email', and 'New Contact'. The 'New Contact' option, represented by a purple contact icon, is highlighted with a red rectangle.</p>
<p>2) From the Contacts List View in the Navigation Bar</p>	 <p>This screenshot shows the 'Contacts' list view in Salesforce. The 'New' button in the top right corner of the list view is highlighted with a red rectangle. Below the button, a table of contacts is visible, including Jodie Comer and Mary Berry.</p>
<p>3) From the case page, when trying to connect a contact to the record and that contact does not already exist.</p>	 <p>This screenshot shows a case record in Salesforce. On the right side, there is a panel titled 'Contact Details' with the instruction 'Link a related record.' Below this is a search bar and a list of existing contacts: Jodie Comer and Mary Berry. At the bottom of this panel, a '+ New Contact' button is highlighted with a red rectangle.</p>

<p>The contact creation form requires a name and one of the following to save a record:</p> <ol style="list-style-type: none"> 1) Birthdate 2) Email 3) Mailing address 	
<p>Save the record and the contact will now be stored in the Salesforce platform.</p>	
<p>What if the contact exists in SIS but not in Salesforce?</p>	<p>Create the contact in Salesforce and include the name and OSU email in any of the email fields.</p> <p>Email the OSU ID and contact information to the Salesforce team so they can add the OSU identifiers to Salesforce.</p>