

SALESFORCE - Creating "CASES" & "SERVICE CALLS"

1. Getting Started

salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/home/home.jsp?tsid=02u200000005j42

File Edit View Favorites Tools Help

salesforce.com - Enterprise Edition

Setup System Log Help & Training Logout

force.com apps

Technician

- Sales
- Marketing
- Call Center
- Google AdWords
- Ideas
- Customer Service
- Technician
- VerticalResponse
- Checkout
- Add AppExchange Apps...
- Create New Apps...

Home Accounts Contacts Opportunities Contracts Cases Service Call Reports Dashboards Documents

ADEMCO
a Ademco Security Group company

Dexine Hu at Ademco (Far East)
Friday 05 March 2010

Dashboard Refresh

As of 02/03/2010 14:13

Total # of Cases Opened

Of Cases Created

Of Cases Closed

This Week

Record Count

Case Owner Role

AntRunHua... CMS Customer... System Ad...

This Week

Record Count

Created By

CMS Team L... Valerie Poh Steven Wang Maria Esquerro Jocelyn Franc...

This Week

Record Count

0 10 20 34

Calendar New Event

Calendar Help

Tuesday 09/03/2010

08:30 09:30 Weekly Meeting (Meeting Room)

March 2010

Mon Tue Wed Thu Fri Sat Sun

https://emea.salesforce.com/00020000002UISM

start

Inbox - Microsoft ... salesforce.com - E... SFDC

SFDC-Case-Alarm ... SFDC Notes-Cases... EN

Internet 100%

2:10 PM

2. Or you could also check for your Cases / Service Calls:

a) Under my Home / Calendar / Event List

Shortcut

[Calendar](#)

Recent Items

- 00002061
- 00001051
- test
- SC - 001315
- SC - 000064
- SC - 001314
- SC - 001559
- SC - 000063
- SC - 000080
- 00001937

Recycle Bin

Case Origin

- Phone
- Contract
- Email
- SSP

by Channel - Click for detailed report

This component shows how many cases were created on the web each week for the current and previous month. This will allow you to identify how well your efforts are going if one of your KPI's is to increase web based case creation volume.

Calendar [New Event](#) [Calendar Help](#)

Today 19/06/2009

10:00 - 18:00 [Tech On-Site Visit](#) (Tech Semiconductor) : [SC - 001315](#)

Monday 22/06/2009

10:00 - 18:00 [Tech On-Site Visit](#) : [SC - 001316](#)

Tuesday 23/06/2009

10:00 - 18:00 [Tech On-Site Visit](#) : [SC - 001317](#)

Wednesday 24/06/2009

12:00 - 13:00 [Tech On-Site Visit](#) : [SC - 001405](#)

Thursday 25/06/2009

12:00 - 13:00 [Tech On-Site Visit](#) : [SC - 001559](#)

15:00 - 16:00 [Tech On-Site Visit](#) : [SC - 001406](#)

June 2009

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 01 | 02 | 03 | 04 | 05 | 06 | 07 |
| 08 | 09 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 01 | 02 | 03 | 04 | 05 |

My Tasks [New](#) [Today + Overdue](#)

| Complete Date | Subject | Name | Related To |
|---------------|----------------------|--------------------------------|--------------------------|
| X | Call | Weng Kong Chan | 00001052 |

b) Under "Service Calls" Tab

Service Call ~ Salesforce - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/a09?fcf=00B20000004mG7G

File Edit View Favorites Tools Help

Service Call ~ Salesforce - Enterprise Edition

Home Accounts Contacts Opportunities Contracts Cases **Service Call** Reports Dashboards Documents

My Svc Calls

Create New View | Edit | Delete | Refresh

| <input type="checkbox"/> Act... | SC No | Case | Appt Date | Appointment Ti... | Appointment St... | Created Date | Client Signature | Reason for n |
|---------------------------------|-------------|----------|------------|-------------------|---------------------|--------------|------------------|--------------|
| <input type="checkbox"/> Edit | SC - 001407 | 00002044 | 26/06/2009 | 26/06/2009 14:33 | Confirmed by cli... | 12/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001406 | 00002044 | 25/06/2009 | 25/06/2009 14:31 | Confirmed by cli... | 12/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001559 | 00002192 | 25/06/2009 | 25/06/2009 11:30 | Confirmed by cli... | 17/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001405 | 00002044 | 24/06/2009 | 24/06/2009 14:28 | Confirmed by cli... | 12/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001317 | 00001937 | 23/06/2009 | 23/06/2009 10:37 | Confirmed by cli... | 09/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001316 | 00001937 | 22/06/2009 | 22/06/2009 10:34 | Confirmed by cli... | 09/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001315 | 00001937 | 19/06/2009 | 19/06/2009 10:30 | Confirmed by cli... | 09/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001314 | 00001937 | 18/06/2009 | 18/06/2009 10:28 | Confirmed by cli... | 09/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001313 | 00001937 | 17/06/2009 | 17/06/2009 20:27 | Confirmed by cli... | 09/06/2009 | | |
| <input type="checkbox"/> Edit | SC - 001587 | 00002218 | 17/06/2009 | 17/06/2009 18:12 | Draft | 17/06/2009 | FFFFFFFF58FC... | |
| <input type="checkbox"/> Edit | SC - 001312 | 00001937 | 16/06/2009 | 16/06/2009 10:32 | Closed | 09/06/2009 | FFFFFFFF54E8... | |
| <input type="checkbox"/> Edit | SC - 001311 | 00001937 | 15/06/2009 | 15/06/2009 19:30 | Closed | 09/06/2009 | FFFFFFFF745E... | |
| <input type="checkbox"/> Edit | SC - 001281 | 00001937 | 12/06/2009 | 12/06/2009 10:30 | Closed | 09/06/2009 | FFFFFFFF15F7... | |
| <input type="checkbox"/> Edit | SC - 001277 | 00001937 | 11/06/2009 | 11/06/2009 10:59 | Closed | 09/06/2009 | FFFFFFFFBAD... | |
| <input type="checkbox"/> Edit | SC - 001276 | 00001937 | 10/06/2009 | 10/06/2009 10:56 | Closed | 09/06/2009 | FFFFFFFF8B3C... | |
| <input type="checkbox"/> Edit | SC - 001357 | 00001999 | 10/06/2009 | 10/06/2009 17:50 | Closed | 10/06/2009 | FFFFFFFFFA5... | |

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Done

Start *P&C in Pers... Dexine Scan... Windows Med... Service Call... Skype™ - dex... Procedures-n... 73 Reminders... Microsoft Exc... Internet 100% 4:54 PM