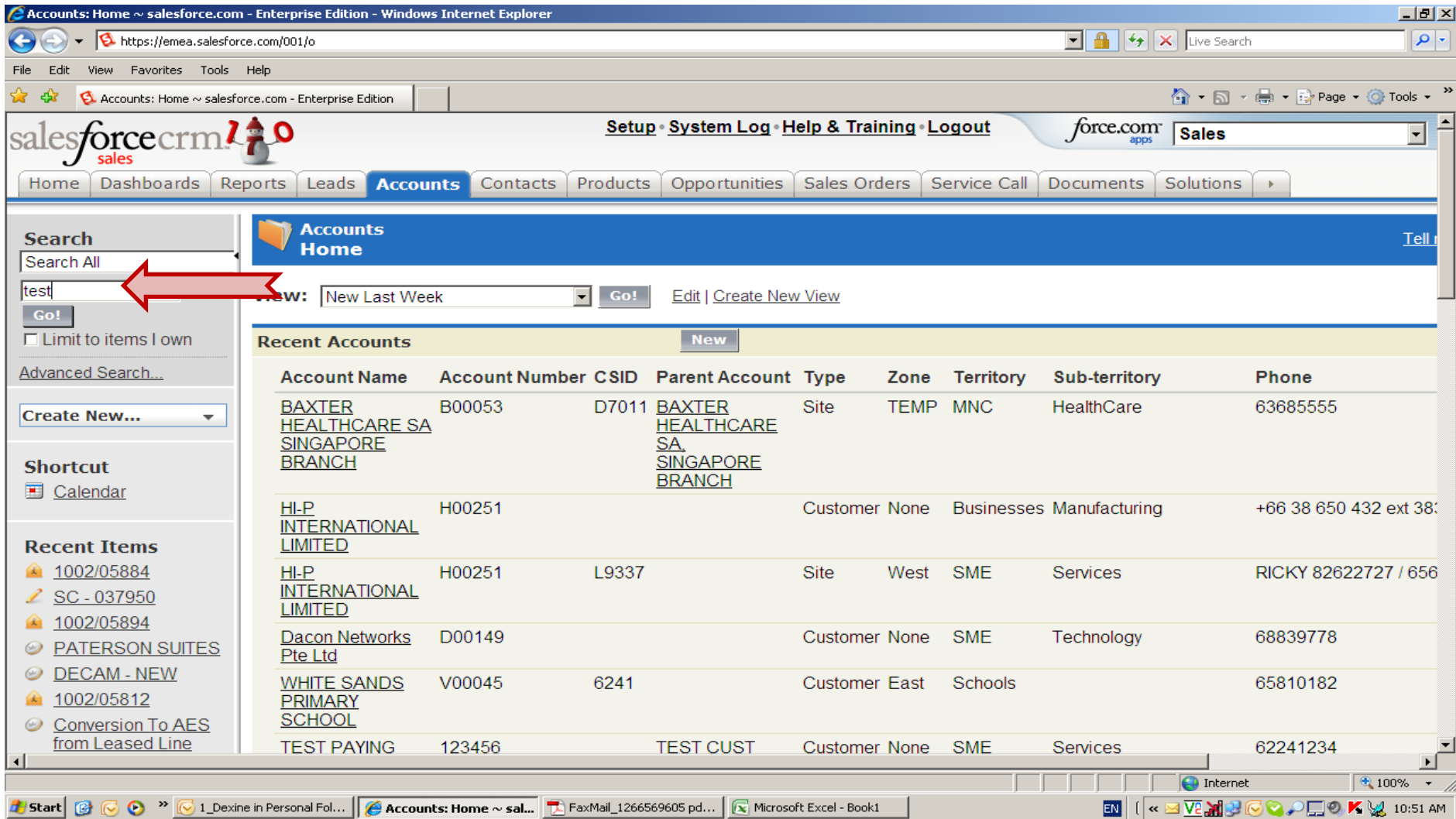


Creating "CASES"

1. Search for "Account" first to check and ensure NO duplicate records are created.



The screenshot shows the Salesforce Enterprise Edition interface in a Windows Internet Explorer browser. The address bar displays <https://emea.salesforce.com/001/o>. The page title is "Accounts: Home ~ salesforce.com - Enterprise Edition". The navigation bar includes links for Setup, System Log, Help & Training, and Logout. The main navigation menu has tabs for Home, Dashboards, Reports, Leads, Accounts (selected), Contacts, Products, Opportunities, Sales Orders, Service Call, Documents, and Solutions. The left sidebar contains a Search section with a "Search All" input field, a "Go!" button, and a "Limit to items I own" checkbox. A red arrow points to the "Search All" input field. Below the search section is a "Create New..." dropdown menu. The main content area displays the "Accounts Home" page with a "New" button and a "Recent Accounts" table. The table has columns for Account Name, Account Number, CSID, Parent Account, Type, Zone, Territory, Sub-territory, and Phone. The table lists several accounts, including BAXTER HEALTHCARE SA SINGAPORE BRANCH, HI-P INTERNATIONAL LIMITED, Dacon Networks Pte Ltd, WHITE SANDS PRIMARY SCHOOL, and TEST PAYING.

Search

Search All

test

Go!

☐ Limit to items I own

Advanced Search...

Create New...

Shortcut

Calendar

Recent Items

- 1002/05884
- SC - 037950
- 1002/05894
- PATERSON SUITES
- DECAM - NEW
- 1002/05812
- Conversion To AES from Leased Line

Accounts Home

New: New Last Week Go! Edit | Create New View

Recent Accounts

Account Name	Account Number	CSID	Parent Account	Type	Zone	Territory	Sub-territory	Phone
BAXTER HEALTHCARE SA SINGAPORE BRANCH	B00053	D7011	BAXTER HEALTHCARE SA SINGAPORE BRANCH	Site	TEMP	MNC	HealthCare	63685555
HI-P INTERNATIONAL LIMITED	H00251			Customer	None	Businesses	Manufacturing	+66 38 650 432 ext 38:
HI-P INTERNATIONAL LIMITED	H00251	L9337		Site	West	SME	Services	RICKY 82622727 / 656
Dacon Networks Pte Ltd	D00149			Customer	None	SME	Technology	68839778
WHITE SANDS PRIMARY SCHOOL	V00045	6241		Customer	East	Schools		65810182
TEST PAYING	123456		TEST CUST	Customer	None	SME	Services	62241234

2. If the account is not an existing record, create a new "Account" For this new Client.

Account Edit: TEST PAYING ACCT ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/0012000000Iiw05/e?retURL=%2F0012000000Iiw05%3FsrPos%3D1%26srKp%3D001

File Edit View Favorites Tools Help

Opportunity/Pipeline Report ... Account Edit: TEST PAYI...

Account Edit: TEST PAYING ACCT Help for this Page

Account Edit Save Save & New Cancel

Account Information

Account Owner Dexine Hu

Account Name TEST PAYING ACCT

Parent Account

Territory MNC

Sub-territory Technology

Facility Size More than 10,000 sq ft

System Brands Available: LENEL, DMP Selected: AMAG

Type of AES Antenna --None--

Signal Strength -Forward (W)

Signal Strength -Reflected (W)

Type Customer

Type - Other

Account Number

C SID

Customer Type --None--

Zone None

Account Currency SGD - Singapore Dollar

CNY - Chinese Yuan

PHP - Philippine Peso

SGD - Singapore Dollar

USD - U.S. Dollar

Contact Information

Phone 62241234

Fax

Website

Address Information

Billing Street

Billing City

Shipping Street

Shipping City

Copy Billing Address to Shipping Address

Start

HikVision in Personal ...

Account Edit: TEST...

Microsoft Excel - SFD...

Quotation: 1002/058...

FW: Halliburton SING...

TL-Quotation-forGem...

Internet

100%

12:27 PM

3. Any additional/useful information or meaningful Activity/Event history should also be keyed in.
Eg. Contact information, Calls/Meetings with Client, Unique system requirements

Account: TEST PAYING ACCT ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/00120000000Iiw05?srPos=1&srKp=001

File Edit View Favorites Tools Help

Opportunity/Pipeline Report ... Account: TEST PAYING ACCT

Open Activities [New Task](#) [New Event](#) [Open Activities Help](#)

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Follow up	Contact Test	TEST PAYING ACCT	✓	01/04/2010	Not Started	High	Dexine Hu

Activity History [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity History Help](#)

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del Call		Contact Test	TEST PAYING ACCT	✓	24/02/2010	Dexine Hu	24/02/2010 13:02

Contacts [New Contact](#) [Merge Contacts](#) [Contacts Help](#)

Action	Contact Name	Title	Email	Phone
Edit Del	A/C DEPT			
Edit Del	Contact Test		test@email.sg	61234567

Contact Roles [New](#) [Contact Roles Help](#)

No records to display

Partners [New](#) [Partners Help](#)

Action	Partner	Opportunity	Role
Del	TKK FACILITIES MANAGEMENT &		Contractor

Notes & Attachments [New Note](#) [Attach File](#) [View All](#) [Notes & Attachments Help](#)

Action	Type	Title	Related To	Last Modified	Created By
Edit Del View	Attachment	waterproof striker_1.pdf	CCTV system for Building 1 Levels 10-20	05/02/2010 19:40	Dexine Hu

Start | Inbox - Microsoft Outlook | Account: TEST PAYIN... | Microsoft Excel - SFDC N... | Windows Media Player | Internet | 100% | 2:41 PM

4. Once "Account" is available, scroll down this "Account" page to create New "CASE".

The screenshot shows the Salesforce interface for an account named 'TEST PAYING ACCT'. The page is viewed in Internet Explorer. The main content area is divided into several sections:

- Account Team:** Shows 'No team members' with buttons for 'Add' and 'Add Default Team'.
- Contracts:** Shows 'No records to display' with a 'New Contract' button.
- Contract Sites:** Shows 'No records to display' with a 'Contract Sites Help' link.
- Cases:** This section is highlighted with a red arrow pointing to the 'New Case' button. It contains a table with two cases:

Action	Case	Contact Name	Reason for Request	Service Level	Date Opened	Status
Edit Cls	00013070	Contact Test	Fault report on Alarm System at zone 3	Next Business Day	10/02/2010	Appt Scheduled
Edit Cls	00013624	Contact Test	Reader at Level 2 Door 22 not working	Next Business Day	25/02/2010	New

- Open Activities:** Shows a table with one activity:

Action	Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Follow up	Contact Test	TEST PAYING ACCT	<input checked="" type="checkbox"/>	01/04/2010	Not Started	High	Dexine Hu

- Activity History:** Shows a table with two activities:

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Follow up on faulty reader		TEST PAYING ACCT	<input type="checkbox"/>	03/03/2010 10:00	Dexine Hu	25/02/2010 16:34
Edit Del	Call	Contact Test	TEST PAYING ACCT	<input checked="" type="checkbox"/>	24/02/2010	Dexine Hu	24/02/2010 13:02

- Contacts:** Shows 'No records to display' with buttons for 'New Contact' and 'Merge Contacts'.

The Windows taskbar at the bottom shows the Start button and several open applications, including 'Sent Items - Microso...', 'Account: TEST PAYI...', 'DEX -works!', 'SFDC-Case-Alarm Ac...', and 'SFDC Notes-Cases &...'. The system clock shows 2:47 PM on 2/24/2010.

5. Fill up the relevant details for this new "CASE". Click "Save".

Case Edit: 00013070 ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/50020000008a2vv/e?retURL=%2F50020000008a2vv

File Edit View Favorites Tools Help

Case Edit: 00013070 ~ salesforce.com - Enterprise E...

Case Edit 00013070 Help for this Page

Case Edit

10 Save Save & Close Save & New Check Spelling Cancel

Case Information

Case Owner: Deline Hu

Case Number: 00013070

1 Contact Name: Contact Test

2 Account Name: TEST PAYING ACCT

Contract

CMS Agent: CSO

Case Record Type: Service Request

3 Case Origin: Phone

4 Type: Fault

5 Service Level: Next Business Day

6 Status: Appt Scheduled

Anticipated Part Delivery Date: 11/02/2010 [05/03/2010]

Service Request Site Visit Details

7 Site Name: TEST SITE

8 Site Contact: Contact Test

Site Contact Phone

Contract Site

Service Requirement

9 Reason for Request: Fault report on Alarm System

Details of Request: Mr. Test called to inform ...

Additional Information

Location: Block A L3

System: Intrusion Detection

Zone No.: 3

Zone Location

start

Sent Items - Microso...

Case Edit: 00013070...

DEX -works!

SFDC-Case-Alarm Ac...

SFDC Notes-Cases &...

EN

Internet

100%

2:53 PM

6. Create a "SERVICE CALL" under this "CASE" page if technician/engineer is required to provide on-site support.

Case: 00013070 ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/50020000008a2vv

File Edit View Favorites Tools Help

Case: 00013070 ~ salesforce.com - Enterprise Edition

Case Owner	Dexine Hu [Change]	CMS Agent	CSO
Case Number	00013070	Date/Time Opened	10/02/2010 17:31
Contact Name	Contact Test	Case Record Type	Service Request
Account Name	TEST PAYING ACCT	Case Origin	Phone
Contract		Type	Fault
		Service Level	Next Business Day
		Status	Appt Scheduled
		Anticipated Part Delivery Date	11/02/2010

▼ Contact Information

Contact Phone	61234567	Contact Email	test@email.sg
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▼ Service Request Site Visit Details

Site Name	TEST SITE	Contract Site	
Site Contact	Contact Test	CSID	
Site Contact Phone		Customer Type	Commercial
		Zone	

▼ Service Requirement

Reason for Request	Fault report on Alarm System at zone 3
Details of Request	Mr. Test called

▼ Additional Information

Location	Block A L3	Zone No.	3
System	Intrusion Detection	Zone Location	
Equipment		Cause of Alarm Activation	
Error Code		Others:	
Created By	Dexine Hu , 10/02/2010 17:31	Last Modified By	Dexine Hu , 10/02/2010 17:31

[Edit](#) [Delete](#) [Close Case](#) [Clone](#) [Sharing](#) [New Quotation](#) [Create Service Call](#)

Service Call (Case) [Create Service Call](#) [Service Call \(Case\) Help](#)

Action	SC No	Date Time In	Date Time Out	Reason for Visit
--------	-------	--------------	---------------	------------------

start 2 Microsoft Office... Case: 00013070 ~ ... DEX -works! Windows Media Pla... Microsoft Excel EN Internet 100% 11:00 AM

The screenshot displays the 'Service Call Edit' form in a web browser. The form is divided into several sections: Information, Appointment Details, Team Assigned, and Fault Summary. Red arrows and boxes highlight specific areas of interest:

- Information Section:**
 - Arrows 1, 2, and 3 point to the 'SC No' (SC - 037950), 'Site Name' (TEST SITE), and 'Site Contact' (Contact Test) fields, respectively.
 - Arrow 4 points to the 'Reason for no Signature' field, which contains 'No signature pad'.
- Appointment Details Section:**
 - Arrow 5 points to the 'Appointment Time' field, which shows '11/02/2010 14:00'.
 - A box labeled 'Important to update "Status" of SC' points to the 'Appointment Status' dropdown menu, which is currently set to 'Closed'.
- Team Assigned Section:**
 - A box labeled 'Free-Text in NAMES of Technical personnel In-charge' points to the 'Team Member 1' field, which contains the text 'Technicians' / Engineers' Names'.

The bottom of the browser window shows the Windows taskbar with various open applications like Microsoft Office, Service Call Edit, and Internet Explorer.

6b. Fill up details of work done on-site.

Service Call Edit: SC - 037950 ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/a0920000006K1Qh/e?retURL=%2Fa0920000006K1Qh

Service Call Edit: SC - 03... Service Call: SC - 038377 ~ s... Service Call Edit: New Servic...

Service Rep

1 Date Time In 11/02/2010 14:00 [08/03/2010 11:02]

2 Date Time Out 11/02/2010 17:47 [08/03/2010 11:02]

Reason for Request FAULT ON IDS REF BLOCK A L3

Details of Request TROUBLESHOOTING OF IDS

3 Record of Work Done

- CHECKED CONTROL PANEL
- CHECKED POWER SUPPLY
- CHECKED WIRING AND TAMPERS
- CHECKED AND CHANGED BACK THE KABA KEYSWITCH
- TESTED KABA KEYSWITCH TO PANEL
- SYSTEM NORMAL
- OLD KEY NUMBER: SN 126054645 (1 KEY)
- NEW KEY NUMBER: SN 126057882 (2 KEYS)
- TOOK BACK 3 KEYS

Follow Up Quotation Required

Recommendation / Follow Up Action

- None--
- Quotation Sent
- Quotation Required
- Visit
- Customer Service

5. Indicate if any recommendation(s) has been made to client

4. Indicate if Follow-Up action is required

These 2 fields are auto-copied from "CASE".

System Details

6 System Checked

Available

- CCTV
- Access Control

Chosen

- Intrusion Detection

Type of Transmission

Available

- AES
- GPRS
- Direct Exchange Line
- Leased Line

Chosen

Tested system with:

7 System normal? Yes

Time of System Check [08/03/2010 11:02]

System Remarks

start

2 Microsoft Office ... Service Call Edit: SC... DEX -works! Windows Media Player Microsoft Excel EN 11:57 AM

6c. Fill up payment details related to this Service Call.

Service Call Edit: New Service Call ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/a09/e?retURL=%2Fa09%2Fo&CF00N20000001XYIC_lkid=50020000008a2vvAAA&CF00N20000001XYIC=00013070&CF00N20000001hD87_II

File Edit View Favorites Tools Help

Service Call Edit: New Ser... Service Call: SC - 038377 ~ s... Service Call Edit: New Servic...

System normal? Yes

No. of Zones Serviced X

System Remarks

Visits / Parts Information

Is the visit chargeable? --None--

Quotation Ref (Service) --None--

Ext Quotation Ref (Service) No

Are parts chargeable? --None--

Quotation Ref (Parts)

Ext Quotation Ref (Parts)

Parts Description

Replacment Type Normal

Payment Information

Collect payment? --None--

Payment Method

Payment Collected

Payment Remarks

Client Acknowledgement

On-Site Contact

Client Title

Office Use Only

This visit is contract entitlement No

Additional Case

Save Save & New Cancel

Home | Accounts | Contacts | Opportunities | Contracts | Cases | Service Call | Reports | Dashboards | Documents | All Tabs

start 2 Microsoft Office... Service Call Edit: N... DEX -works! Windows Media Pla... Microsoft Excel EN 12:32 PM

Important to indicate NAME & JOB TITLE OF Client who signed Service Report.