

## **SALESFORCE - Creating "CASES" & "SERVICE CALLS"**

### **1. CASES**

- a) "CASES" should be created for any type of Service Requests,  
eg. Any Fault reported, Preventive Maintenance visit, Replacement/Relocation of Equipment
- b) Even if Client reports a fault and remote technical support is provided via email/phone,  
a Case should be created, and closed when problem is solved.  
This will serve as a record/reference in the technical history for this Account.
- c) The status of each Case opened should be updated and followed through till they are "Closed".
- d) The emphasis is on "First-Call Resolution".  
Having too many Cases left "Open" for too long calls for attention and immediate action.

### **2) SERVICE CALLS**

- a) A "SERVICE CALL" is a digital format of your existing physical Service Report Form.
- b) "SERVICE CALLS" should be created for any type on on-site Technical service rendered.  
eg. Any Fault reported, Preventive Maintenance visit, Replacement/Relocation of Equipment
- c) If you are still using the physical copy of Service Report Form, a similar record should be entered into Salesforce.