



SalesForce Navigation

User guide
2014

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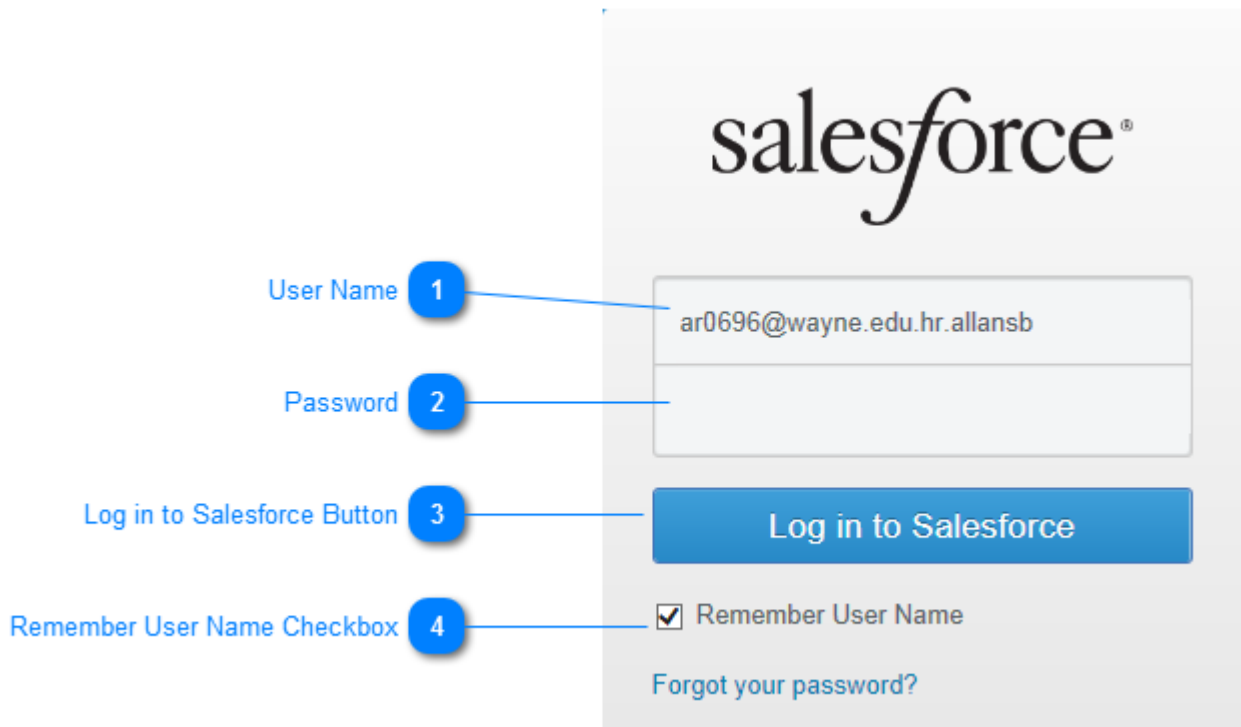
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Human Resources CRM Introduction

Customer Relationship Management (CRM) is a method for managing customer contacts. It was developed from a commercial perspective where businesses needed a way to keep track of their customers, the customer's contact information and interactions that occurred with these customers, e.g. sales orders, requests for product quotes, etc. CRM is not new. Businesses were managing the relationships they had with their customers long before the invention of the computer. However, in our computer-driven culture if you hear the term CRM, it is usually in conjunction with a software application. The CRM software application that WSU has implemented is Salesforce.

Salesforce, as the name implies, was developed for processing customer sales. Although WSU Human Resources does not *sell products* to customers, it does *provide services* to customers. Who are HR's customers? WSU employees and those who are affiliated with WSU.

Log into Salesforce



<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 User Name

ar0696@wayne.edu.hr.allansb

Enter your Salesforce user name. It will be a combination of your generic **WSU email address** *plus* **hr.crm**

2 Password

[Empty password field]

Enter your **Pipeline** password.

3 Log in to Salesforce Button

Log in to Salesforce

Click the **Log in to Salesforce** button to initiate the login.

Note: If you want Salesforce to remember your user name, you **MUST** click in the **Remember User Name** checkbox before clicking the button

4 Remember User Name Checkbox

Click the **Remember User Name** checkbox to have Salesforce remember you user name. The next time you log in to Salesforce, your user name will display, and you will only be required to enter you password.

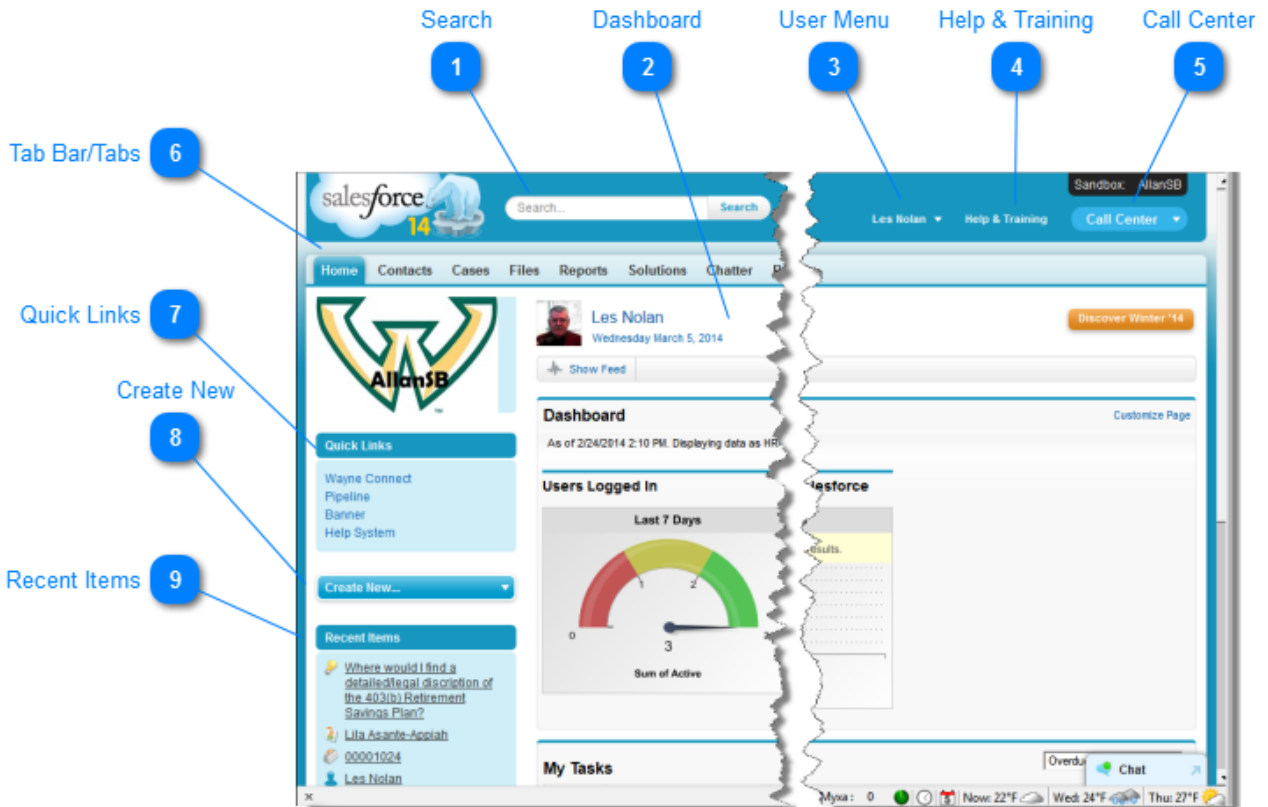
Salesforce Application Layout

Overview

The screenshot displays the Salesforce application interface for user Les Nolan. The layout is organized into several key sections:

- Top Navigation Bar:** Contains the Salesforce logo, a search bar, and user profile information (Les Nolan, Help & Training, Call Center).
- Left Sidebar:** Includes navigation tabs (Home, Chatter, Profile, Groups, Files, Reports), a profile card for Les Nolan, and several utility sections: Quick Links (Wayne Connect, Pipeline, Banner, Help System), Create New..., Recent Items (Claressa Adams, Les Nolan, Admin Region, etc.), Messages and Alerts, and a Recycle Bin.
- Main Dashboard:** Features a "Dashboard" section with a "Refresh" button and "Customize Page" option. It displays data for "Users Logged In" (Last 7 Days), "# Completed Activities" (Last 30 Days), and "Information Added to Salesforce" (# of Accounts). Below this are "My Tasks" (no open tasks) and a "Calendar" (no events scheduled).
- Bottom Footer:** Contains copyright information (© 2000-2014 salesforce.com) and links to Privacy Statement, Security Statement, Terms of Use, and 508 Compliance.

Home Tab



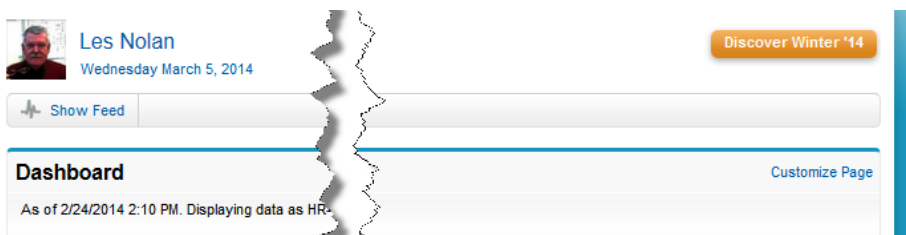
This screen will display when the user logs into Salesforce. The **Home** tab is the default "active" tab. The Dashboard area is customizable.

1 Search



The Search function allows the user to search on any item or object within Salesforce, e.g. case numbers, reports, groups etc.

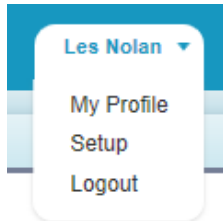
2 Dashboard



3 User Menu



This menu enables users to create a profile, make changes to various account and desktop parameters, and log out of the current Salesforce session.

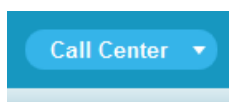


4 Help & Training



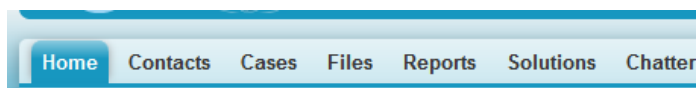
Because Salesforce CRM was developed to support a sales environment, much of the help and training is developed from a sales perspective using sales jargon. However, there are some help topics that can provide the user with good information.

5 Call Center



This function not currently used at WSU.

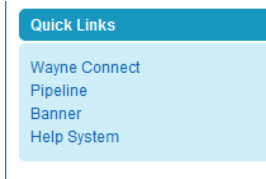
6 Tab Bar/Tabs



Each tab on the **Tab Bar** contains a group of related functions with a distinct layout. The **Tab Bar** is completely customizable.

7

Quick Links



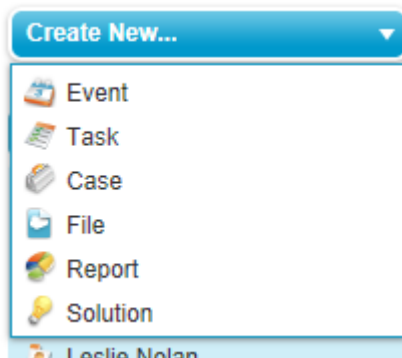
This section of the navigation panel contains links to commonly referenced WSU websites. These links are customizable by the WSU Salesforce Administrator.

8

Create New

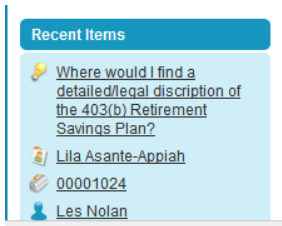


This section of the navigation panel allows users to quickly create calendar events, e.g. appointments, tasks for an action or todo list, a new case, upload a file, a new report, and a new solution.



9

Recent Items



This section of the navigation panel displays a user's most recent activity with the CRM. From creating cases, to uploading documents (files), to communicating with other CRM users, the user can quickly revisit recent activity.

Contacts Tab

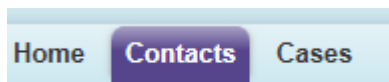
The screenshot shows the Salesforce CRM interface for the 'Contacts' tab. The top navigation bar includes 'Home', 'Contacts', 'Cases', 'Files', 'Reports', and 'Solutions'. The 'Contacts' tab is selected. Below the navigation bar, there is a search bar and a 'View: All Contacts' dropdown menu. The main content area is divided into several sections: 'Recent Contacts' (a table of contact information), 'Reports' (a list of report names), and 'Tools' (a list of tool names). On the left side, there are 'Quick Links', 'Create New...', 'Recent Items', 'Contact Reports', and '(Contact) Tools' sections. The interface is annotated with numbered callouts: 1 points to the 'Contacts Tab' in the navigation bar; 2 points to the 'Contacts View Control' (View dropdown); 3 points to the 'Recent Contacts (List)'; 4 points to the 'Recent Items' section; 5 points to the 'Contact Reports' section; and 6 points to the '(Contact) Tools' section.

Name	AccessID	BannerID	Phone
Asante-Appiah, Lila	fk1260	004382478	(313) 577-6519
Aziz, Dawn	ej1150	004107073	(313) 577-9341
Nolan, Leslie	ar0696	003570132	(313) 577-9021
Gaines, Johnnie	ad3407	000103903	(313) 993-8368
Blumberg, Kathleen	dx0229	003980844	(313) 577-1578
Aggen, David	fn0302	004412277	(248) 601-4805
Rager, Elizabeth	aa8224	000153805	(313) 577-6023
Adams, Claressa	ab5003	000037235	(313) 577-8890

The Contacts tab provides you with the ability to view personal, employment, and job information about any contact that has been loaded into the CRM database. Currently, the database includes:

- Active WSU Employees
- Retired WSU Employees
- Volunteers

1 Contacts Tab

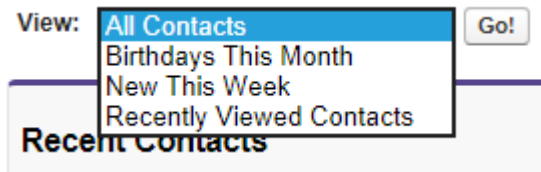


Click the **Contacts** tab to display contact information.

2 Contacts View Control

View: [te New View](#)

Selecting an option from the **View** pull-down list (shown below) and clicking **GO** will give you some control which contact information is displayed.

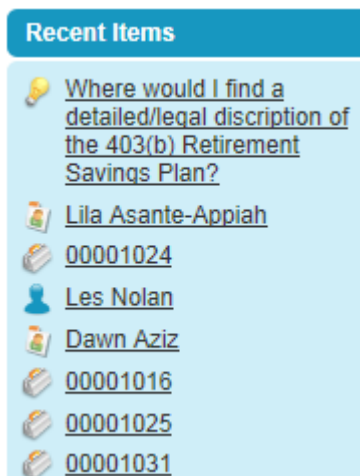


3 Recent Contacts (List)

Recent Contacts			
Name	AccessID	BannerID	Phone
Asante-Appiah, Lila	fk1260	004382478	(313) 577-6519
Aziz, Dawn	ej1150	004107073	(313) 577-9341
Nolan, Leslie	ar0696	003570132	(313) 577-9021

Recent Contacts are displayed in this area as a result of clicking **Recent Viewed Contacts** from the View pull-down list and clicking **GO**.

4 Recent Items




You can also display recently viewed contacts from the **Recent Items** section of the navigation panel. Names in this list are the result of either reviewing contact information of **Chats** that you make or by other users you are following. Numbers are recently viewed or created Case Numbers.

By hovering your mouse pointer over an entry, a summary pop-up will display.

If it was a recently viewed contact, the pop-up will look like this:

Contact		View
Name	Johnnie Gaines	
AccessID	ad3407	
BannerID	000103903	
Account Name		

If it was a **Chat** response, the pop-up will look like this:



Allan Kjellberg ●
HR Systems Analyst

[Phone](#) (313) 577-2362

Observer

✓ Following ✕

[Send a message](#)

[Chat now](#)

Note: Numerical values contained in the list are **Case** numbers.

Case		View	Edit
Contact Name			
Status	New		
Case Origin	Phone		
Priority	Medium		
Subject	Benefits Changes		
Description	How will this affect my benefits?		

5 Contact Reports

- ### Reports

 - [HTML Email Status Report](#)
 - [Partner Accounts](#)
 - [Mailing List](#)
 - [Contact History Report](#)
 - [Bounced Contacts](#)

This section provides reports that are specifically associated with contacts.

6

(Contact) Tools

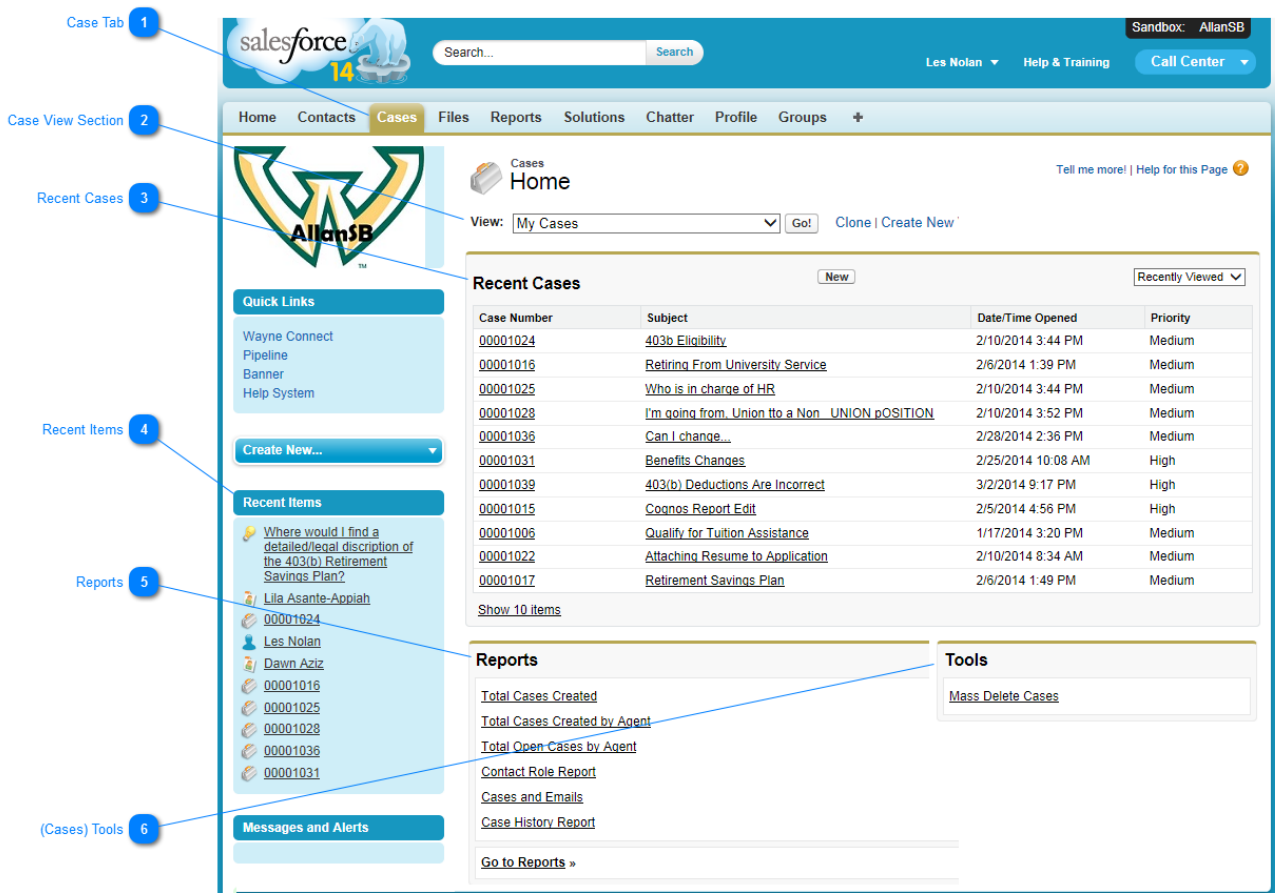
Tools

[Sync to Outlook](#)

[Mass Stay-in-Touch](#)

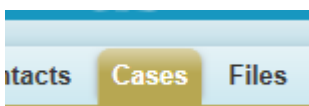
To be determined.

Case Tab



Creating a Case is the method for documenting an interaction with an Contact.

1 Case Tab



Click the **Case** tab to display **Case** information.

2 Case View Section



Selecting an option from the **View** pull-down list (shown below) and clicking **GO** will give you some control which combination of cases are displayed.

View: **All Open Cases**

- Benefits
- Client Services
- Compensation
- Escalated - Service Center
- General
- My Cases
- My Open Cases
- Recently Viewed Cases
- Wellness

Rece

Case #	Report Ed	from. Un
00001		
00001		

3

Recent Cases









Recent Cases <input type="button" value="New"/> Recently Viewed ▾			
Case Number	Subject	Date/Time Opened	Priority
00001024	403b Eligibility	2/10/2014 3:44 PM	Medium
00001016	Retiring From University Service	2/6/2014 1:39 PM	Medium
00001025	Who is in charge of HR	2/10/2014 3:44 PM	Medium

Recent Cases is display in this area as a result of clicking **Recently Viewed Cases** from the View pull-down and clicking **GO**. The layout and information displayed will vary with the selection from the View pull-down list.

4

Recent Items

Recent Items

-  [Where would I find a detailed/legal discription of the 403\(b\) Retirement Savings Plan?](#)
-  [Lila Asante-Appiah](#)
-  [00001024](#)
-  [Les Nolan](#)
-  [Dawn Aziz](#)
-  [00001016](#)
-  [00001025](#)
-  [00001028](#)

You can also display recently viewed cases from the **Recent Items** section of the navigation panel. Numerical values in the list are case numbers. You can hover your mouse pointer over the case number to display a brief summary of the case.

The pop-up for a recently viewed case will look like this:

Case	
Contact Name	Kathleen Blumberg
Status	New
Case Origin	Phone
Priority	Medium
Subject	Cognos Report Edit
Description	Needs additional information on report to identify employees whose assignment has ended.

Note: Name values contained in the list are the result of Chat interactions.

5 Reports

Reports
Total Cases Created
Total Cases Created by Agent
Total Open Cases by Agent
Contact Role Report
Cases and Emails
Case History Report

This section provides reports that are specifically associated with cases.

6 (Cases) Tools

Medium
Medium
High
High
High

To be determined.

Files Tab

Files Tab 1

Files Views 2

salesforce 14

Search... Search

Les Nolan Help & Training Call Center

Home Contacts Cases **Files** Reports Solutions Chatter Profile Groups

Chatter > Files Video Tutorial Help for this Page Get our mobile app

All Files

Recently Viewed

MY FILES

Files I Own

Files Shared with Me

Files I Follow

FILES IN MY GROUPS

All Wayne State University

Admin Region (Private)

Upload Files or drag and drop to add files...

Search All Files... Search

Actions	Name	Owner	Last Modified
	External_Link	Nolan, Les	Feb 27
	Salesforce Help Topics	Nolan, Les	Feb 27
	Claressa Adams	Nolan, Les	Jan 17

1 - 3 of 3 << < Previous Next > >> Page 1 of 1

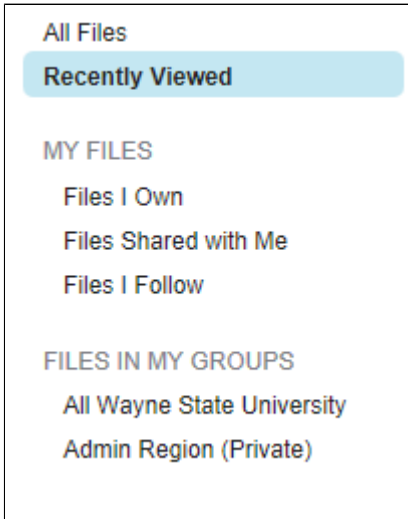
Use the Files tab to upload, store, find, follow, share, and collaborate on files in the Salesforce cloud.

1 Files Tab



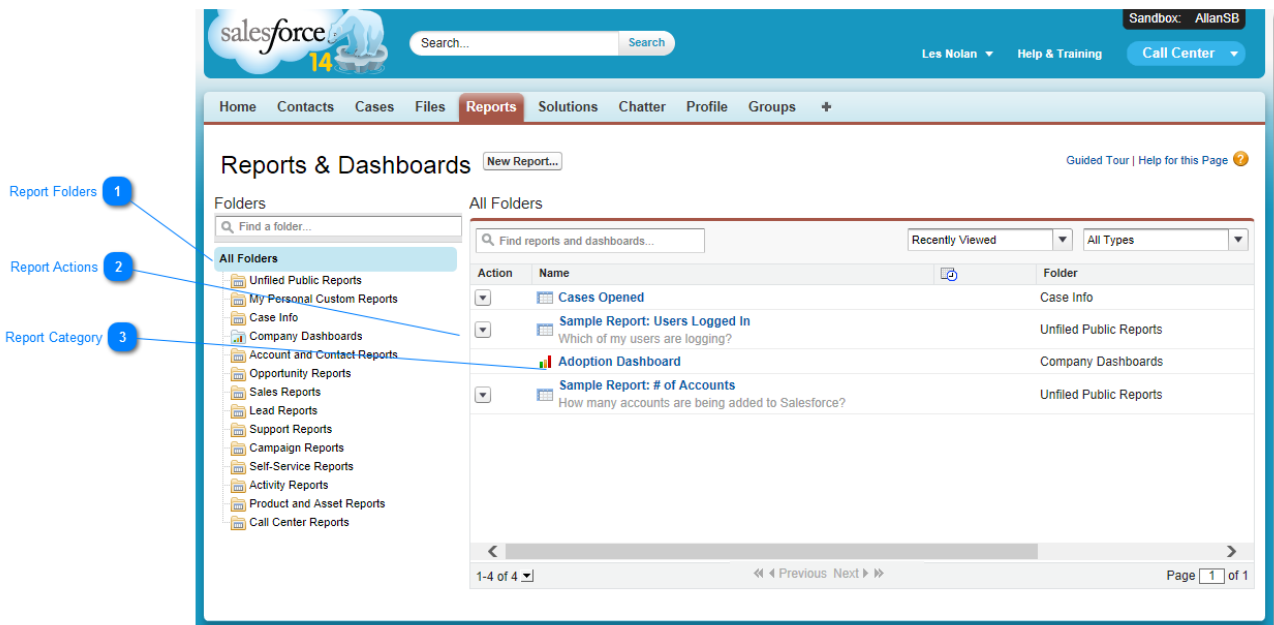
Any file you own or have access to is available to [share](#) or [attach to posts or comments](#) on Chatter feeds. All file types are supported, including everything from Microsoft® PowerPoint presentations and Excel spreadsheets, to Adobe® PDFs, image files, audio files, and video files.

2 Files Views



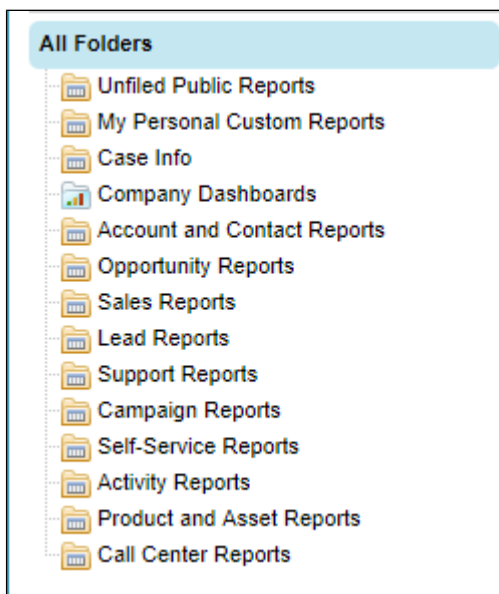
The options in this listing enable the user to filter the files that will be displayed. Filtering displays only those files that met the filter criteria and reduces the number of files displayed.

Reports Tab



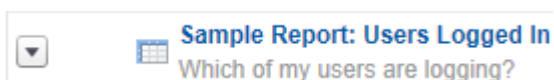
Reports give the user access to data that has accumulated over time. The data can be displayed in almost infinite combinations and can be share with others via dashboards.

1 Report Folders

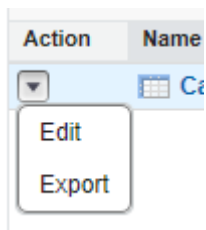


System report are sorted into folders. Folders are used to categorize report types. Click the folder name to display a list of the reports contained in that folder.

2 Report Actions



Actions to be taken by report developers. Click the button to display the actions.



3 Report Category

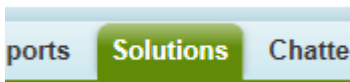
- Adoption Dashboard
- Sample Report: # of Accounts

Solutions Tab

The screenshot shows the 'Solutions' tab selected in a navigation menu. The page title is 'Solutions Home'. Below the title is a search bar with the text 'Enter keywords to find matching solutions.' and a 'Find Solution' button. Below the search bar is a 'Solution Views' section with a dropdown menu set to 'Recently Viewed Solutions', a 'Go!' button, and a 'Create New View' link. Below that is a 'Recent Solutions' table with columns for Solution Title, Solution Number, Status, and Author Alias. The table contains four rows of draft solutions. Below the table is a 'Reports' section with links for 'Solution List', 'Solution History Report', and 'Go to Reports »'.

Solution Title	Solution Number	Status	Author Alias
Where would I find a detailed/legal discription of the 403(b) Retirement Savings Plan?	00000002	Draft	LNolan
Who did I list as beneficiaries?	00000004	Draft	LNolan
How do I contact the investment carrier?	00000003	Draft	LNolan
Where can I find information about the 403(b) Retirement Savings Plan?	00000001	Draft	LNolan

1 Solutions Tab



Clicking the **Solutions** tab displays the Solutions home page.

2 Find Solutions

Enter keywords to find matching solutions.

Enter key words to search for a solution.

3 Solution Views

Solution Views

View: [Create New View](#)

Browse for solutions by category name and sub-category.

4

Recent Solutions

Recent Solutions New Recently Viewed ▾			
Solution Title	Solution Number	Status	Author Alias
Where would I find a detailed/legal discription of the 403(b) Retirement Savings Plan?	00000002	Draft	LNolan
Who did I list as beneficiaries?	00000004	Draft	LNolan
How do I contact the investment carrier?	00000003	Draft	LNolan
Where can I find information about the 403(b) Retirement Savings Plan?	00000001	Draft	LNolan

Click the solution title to display the solution.

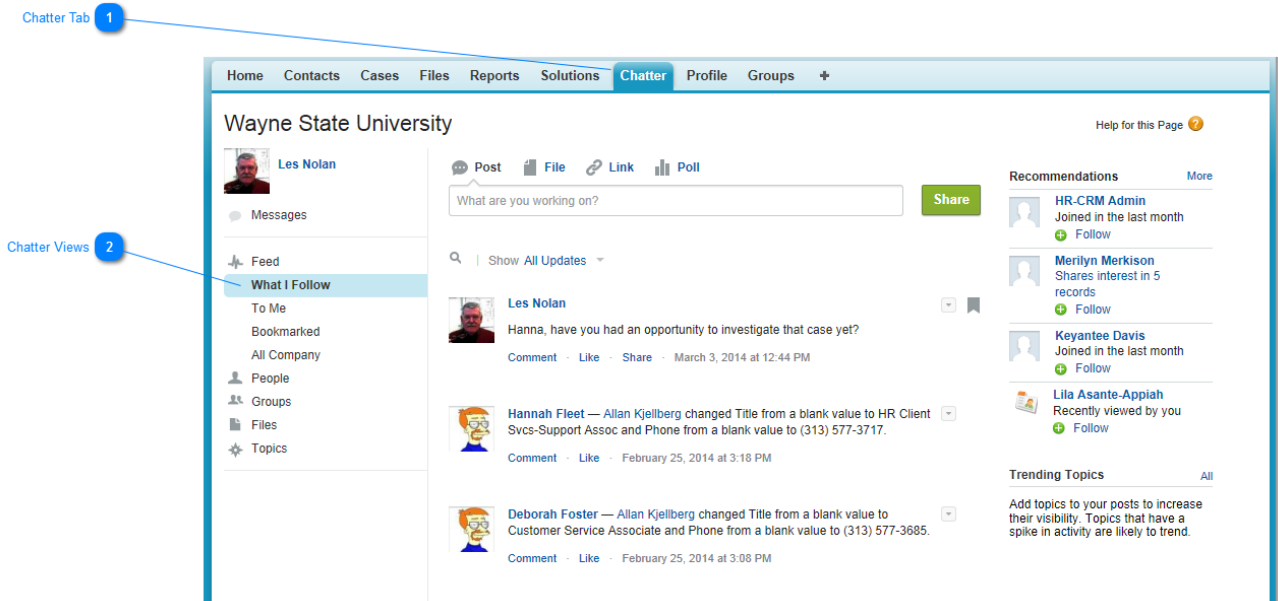
5

Reports

Reports
Solution List
Solution History Report
Go to Reports »

Display a list of solutions.

Chatter Tab



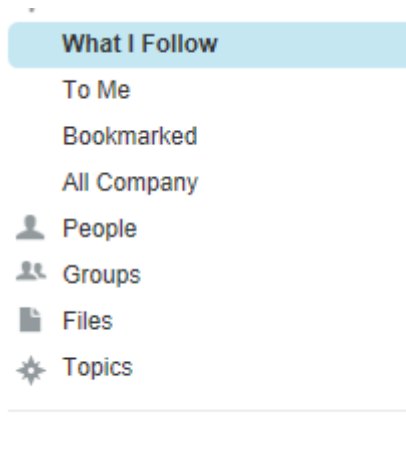
<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 Chatter Tab



The **Chatter** tab is the collaboration home base and give the user instant access to most of the collaboration features in Chatter.

2 Chatter Views



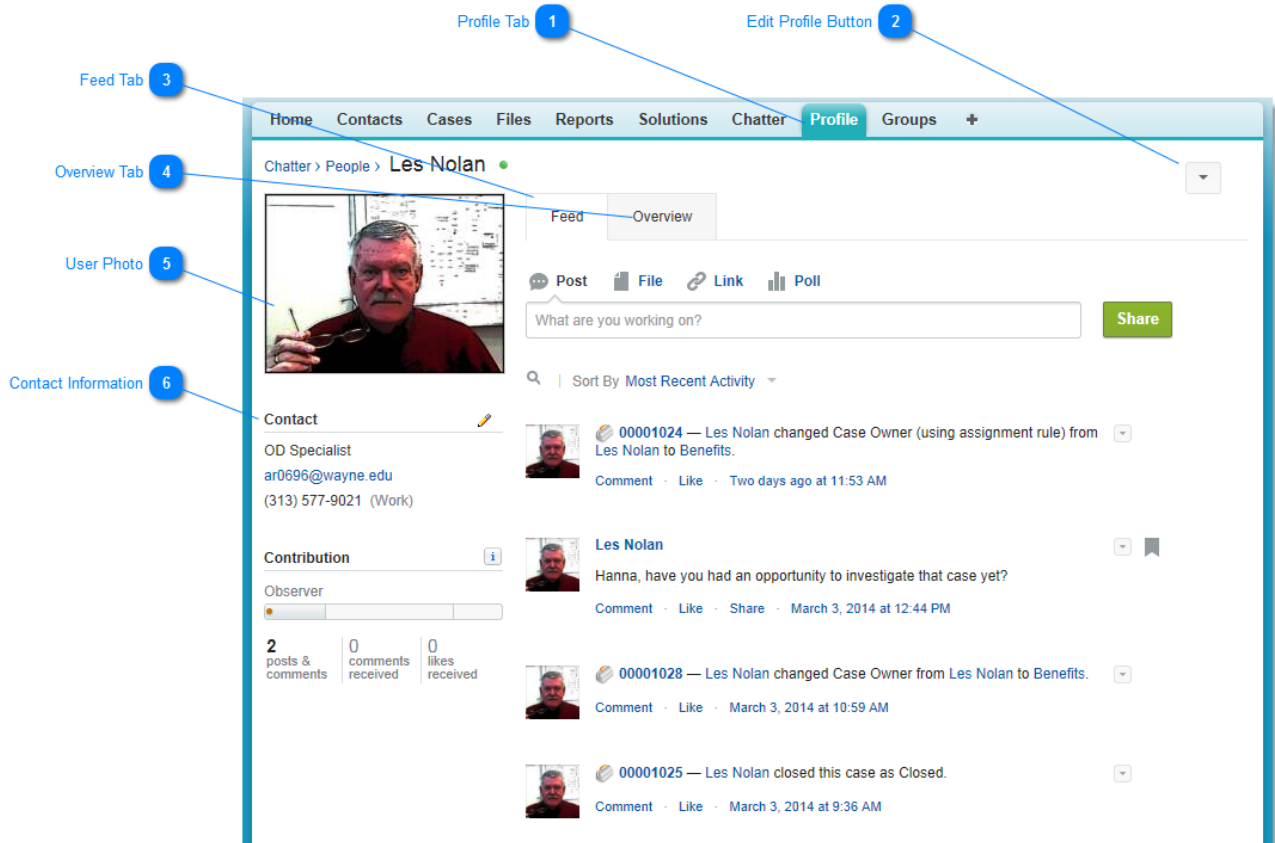
The user can accomplish all of the following from the Chatter tab:

- [Make a post](#) that's shared with people who follow you, or comment on someone else's post.
- [Like posts or comments](#) to show your support.
-

[Share a post](#) to your profile or to a group, or send a link to the post to other Chatter users in an email or instant message.

- [View, filter, and sort your feed](#) on the left side to view posts from people and records you follow and groups you're a member of, posts that mention you, posts you bookmarked, or all posts from your company.
- [Search the feed](#) to quickly find information in the feed posts and comments on the Chatter tab.
- [Bookmark a post](#) to keep track of future comments on the post, or to remember to follow up on the post later.
- [Add topics to a post](#) to categorize the post and give it more visibility.
- Access your [people](#), [groups](#), [files](#), and [topics](#) lists.
- [View or update your profile](#), such as your profile photo or your contact information.
- [Read or send private messages](#) that are only visible to certain people.
- [Access your favorites](#) to see the latest posts and comments for your favorite topics, list views, and Chatter feed searches.
- [View your recommendations](#) for people, groups, files, and records that closely relate to your job and interests.
- [View trending topics](#) that people are discussing in Chatter right now.
- [Invite people to join your Chatter network](#) if they don't have Salesforce licenses to use Chatter.

Profiles Tab



<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 Profile Tab

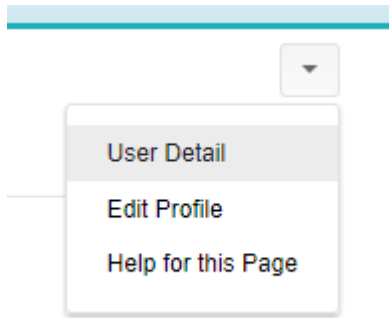


Click the Profile tab to customize the users profile with a photo and information about themselves.

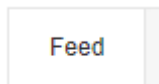
2 Edit Profile Button



Click this button to edit your profile or access your personal settings.

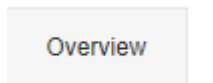


3 Feed Tab



Click the **Feed** tab to view your Chatter feed or post an update.

4 Overview Tab



Update your About Me section, view your groups or see who is following you and who you are following.

5 User Photo

Chatter > People > **Les Nolan** ●



Click your photo to add or change the photo.

6 Contact Information

Contact



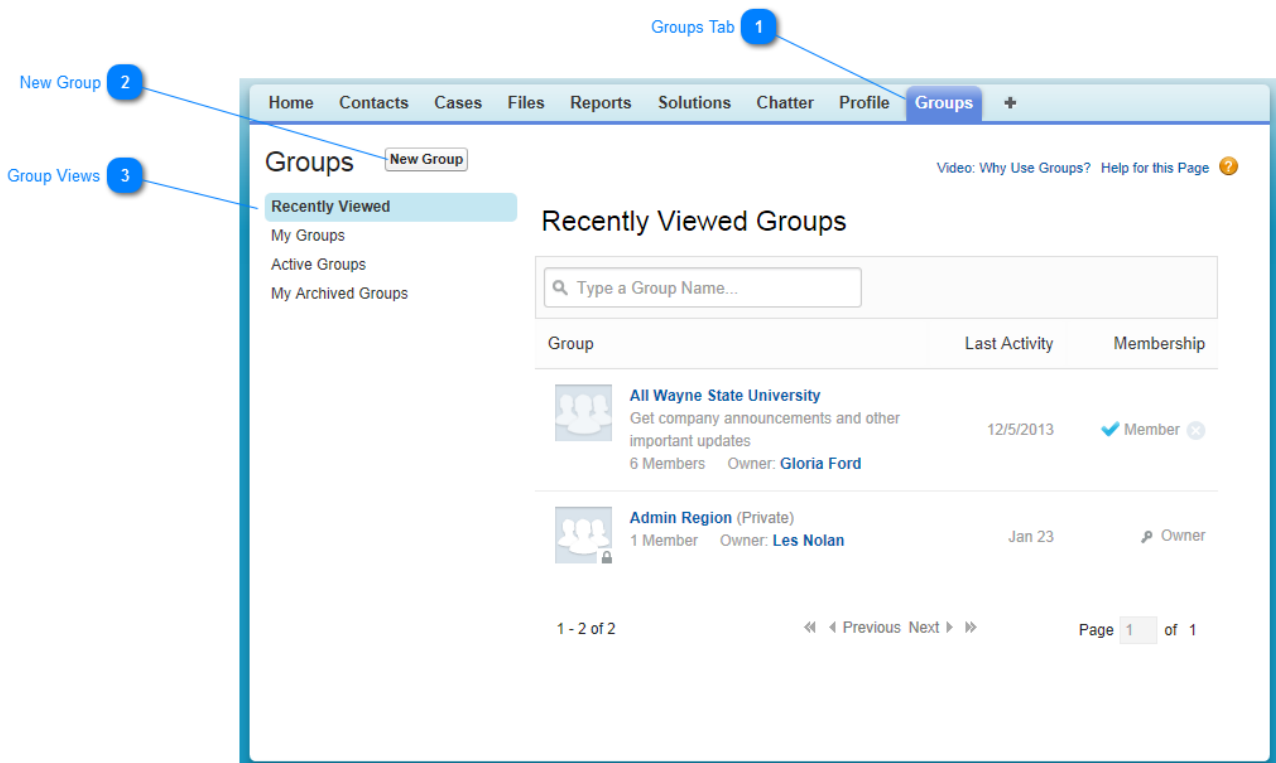
OD Specialist

ar0696@wayne.edu

(313) 577-9021 (Work)

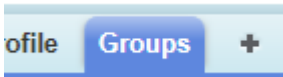
Click the pencil icon to edit your contact information.

Groups Tab



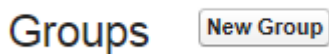
<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 Groups Tab



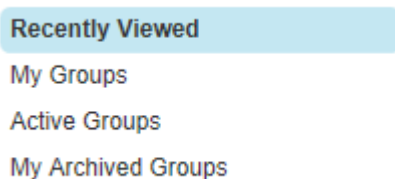
The **Groups** tab display your Chatter Groups.

2 New Group



Click the **New Group** to create a new Chatter Group.

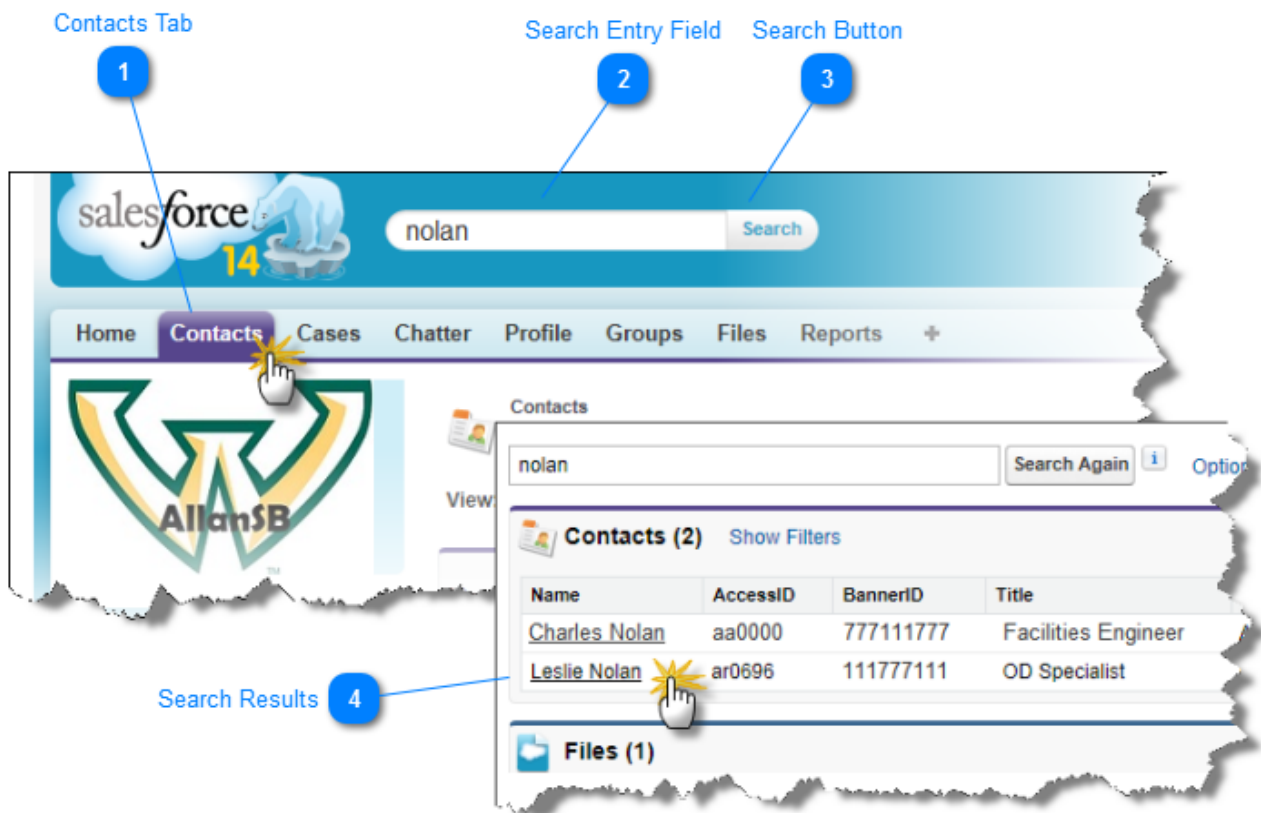
3 Group Views



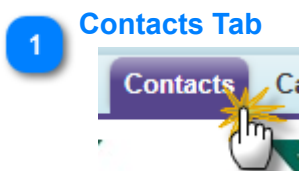
Click a **Group View** to display the groups by category.

Locating an Employee's Contact Information

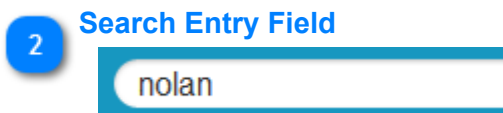
The first time you attempt to locate an employee's contact information after logging in, you must use the Search function at the top of the screen. Subsequent searches can be performed from the search box that displays with the results of your initial search.



After obtaining the employee's WSU Access ID or his/her last name:



Click the **Contacts** tab (*unless already selected*) to locate the contact information for a WSU employee.



Enter the employees last name in the **Search** box.



Click the **Search** button to initiate the search.

4

Search Results

Name	AccessID	BannerID	Title
Charles Nolan	aa0000	777111777	Facilities Engineer
Leslie Nolan	ar0696	111777111	OD Specialist

This search produced two results, click the appropriate employee's name to open his or her contact information.

The contact information for this employee will display.

Contact **Leslie Nolan**

[Show Feed](#)

[Cases \[0\]](#) | [Open Activities](#)

Contact Detail

Name Leslie Nolan

Email ar0696@wayne.edu

Phone [\(313\) 577-9021](tel:(313)577-9021)

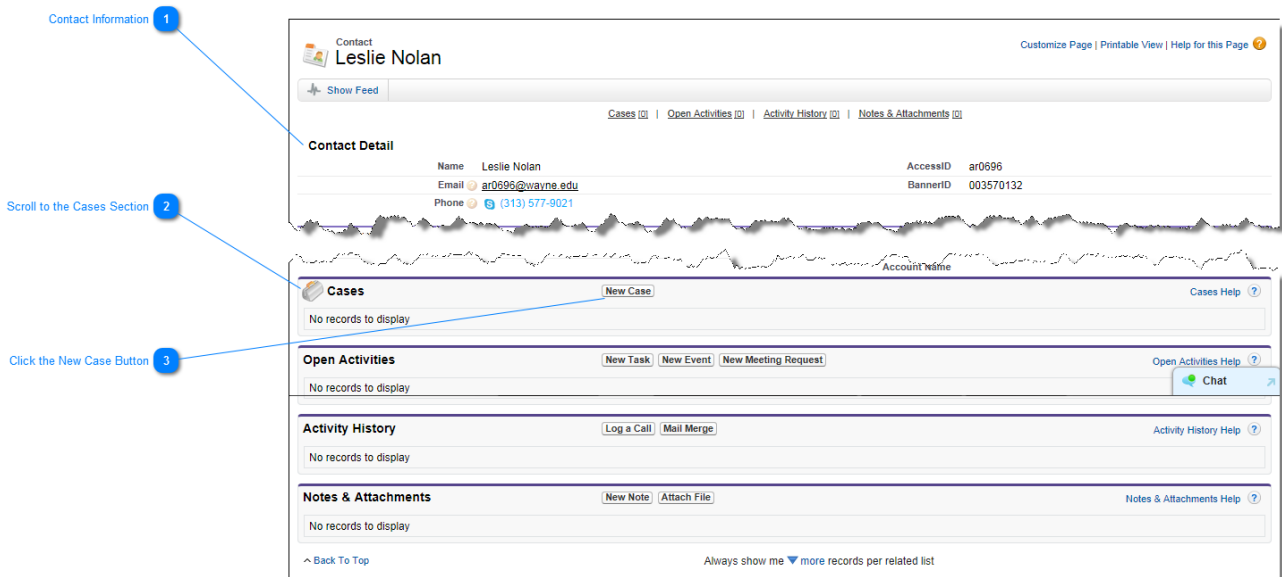
Working With Cases

Issues brought to the attention of the Employee Resource Center (ERC) are documented by creating a case. The case can be retained within the ERC for solution, assigned to a Response Queue or assigned to an individual user.

The case contains the following information:

- The case number
- The case owner (person responsible for providing a solution/response to the contact).
- The name of the contact and the contact information
- Case status, a discription of the issue, the date the case was created, and how the case came to the ERC.
- Case comments, case history, and any related cases.
- If the case is closed, how the case was resolved.
- Open acivities and activity history.
- Attachments (supporting documentation) that may have been applied to the case.

Creating a Case for a WSU Employee



Creating a Case is the method for documenting the interaction with a contact.

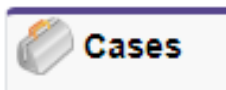
1 Contact Information

Contact Detail

Name Leslie Nolan
Email ar0696@wayne.edu
Phone [\(313\) 577-9021](tel:(313)577-9021)

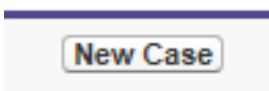
To create a "Case" for an employee issue, you must first locate the employee's contact information. Follow the step described in the section [Locate the Employee's Contact Information](#).

2 Scroll to the Cases Section



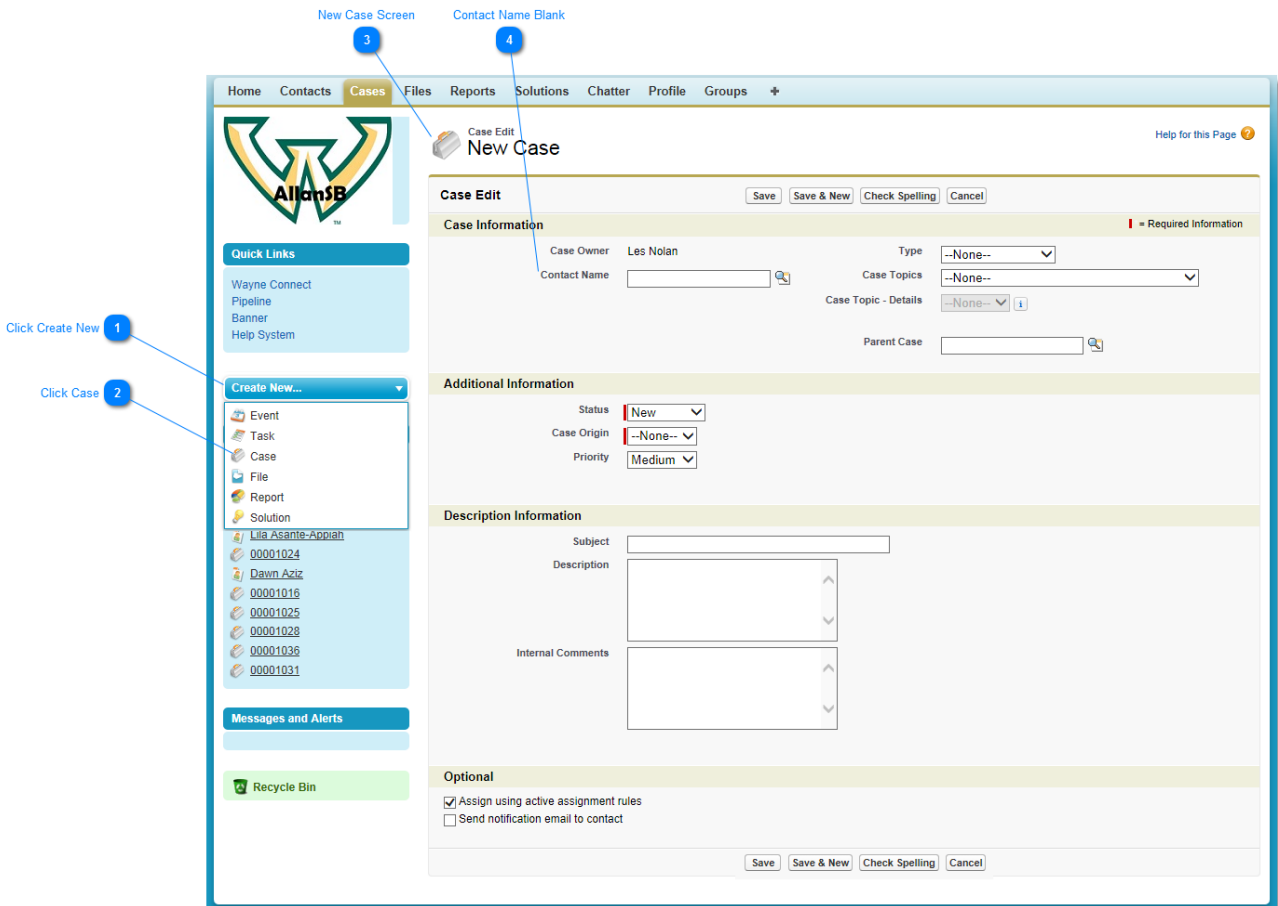
The **Cases** section is located toward the bottom of the screen after the last of the employee's information.

3 Click the New Case Button



Click the **New Case** button to open a new case screen.

Creating a Case For a Non-Employee



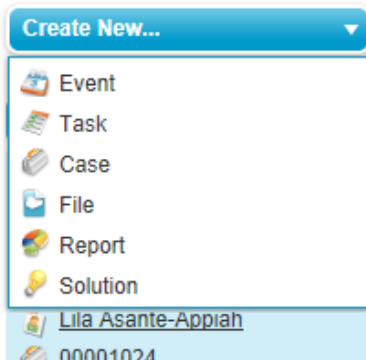
Creating a case for a non-employee differs in the way in which the case is created.

1 Click Create New



Click **Create New...** to activate the pull-down menu.

2 Click Case



Click **Case** to create a new case for a non-employee inquiry.

3 New Case Screen

A screenshot of the "Case Edit" interface. At the top, it says "Case Edit" with a "Save" button and a partially visible "S" button. Below this is a section titled "Case Information" with a light green background.

The **New Case** screen is displayed in the **Edit** mode and is ready to be completed.

4 Contact Name Blank

A screenshot of a form field labeled "Contact Name". The field is empty and has a magnifying glass icon to its right.

The **Contact Name** field is blank because the new case was not created from an employee's **Contact** screen. When a new case is created from the employee's Contact screen, the employee's name is inserted in the Contact Name field.

The **Contact Name** for non-WSU contacts must be entered into...

CAUTION: Do not click the **Contact Name Lookup** button to the left of the Contact Name field to add a contact name. Only WSU employees and those associated with Wayne State have contact records in Salesforce.

A screenshot of the "Contact Name" field. Above it, "Case Owner" is listed as "Les Nolan". The "Contact Name" field is empty. A red circle highlights the magnifying glass icon to the right of the field. Below the field is a button labeled "Contact Name Lookup (New Window)".

Completing a New Case

The screenshot shows the 'Case Edit' form for a 'New Case'. The form is divided into several sections: 'Case Information', 'Additional Information', 'Description Information', and 'Optional'. The 'Case Information' section includes fields for Case Owner (Les Nolan), Contact Name (Dawn Aziz), Type (Problem), Case Topics (TCW General Information), Case Topic - Details (Retirement Savings Plans), and Parent Case. The 'Additional Information' section includes Status (New), Case Origin (Phone), and Priority (High). The 'Description Information' section includes Subject (403(b) Deductions Are Incorrect), Description (Employee submitted new 403(b) Salary Reduction Agreement to increase employee contribution, but last pay stub did not show new increased amount.), and Internal Comments (Employee had contacted her manager. Manager referred employee to ERC.). The 'Optional' section includes checkboxes for 'Assign using active assignment rules' (checked) and 'Send notification email to contact' (unchecked). The form has buttons for 'Save', 'Save & New', 'Check Spelling', and 'Cancel' at the top and bottom. Numbered callouts 1-16 point to various fields and buttons: 1 (Case Owner), 2 (Contact Name), 3 (Status), 4 (Case Origin), 5 (Priority), 6 (Type), 7 (Case Topic), 8 (Case Topic - Detail), 9 (Subject), 10 (Description), 11 (Internal Comments), 12 (Options), 13 (Save), 14 (Save & New), 15 (Check Spelling), and 16 (Cancel).

A well constructed case will help ensure a timely and accurate resolution of the case.

1 Case Owner

Case Owner Les Nolan

For a new case, the originator of the case is the default **Case Owner**. The Case Owner may retain control of the case to resolve it on his/her own or can allow the case to be reassigned to a designated case queue. When a case is reassigned to a queue, the queue becomes the Case Owner.

2 Contact Name

Contact Name Dawn Aziz

The **Contact Name** contains the name of the qualified WSU employee/associate when the case is created from the Contact.

3 Status

Status

New is the default **Status** for a newly created case.

4 Case Origin

Case Origin

Case Origin indicates how the issues was brought to the ERC. Walk-in, Email, Mail (Post) and Web are additional options.

5 Priority

Priority

The default **Priority** is Medium. High and Low are also options.

6 Type

Type

Type gives insight into the type of case being created. Question, Info Request and Service Request are also options.

7 Case Topic

Case Topics

Case Topic provides a high-level classification of the case. Case Topic also plays a role in the routing of the case to the proper queue.

8 Case Topic - Detail

Case Topic - Details

Case Topic - Detail provides a second-level classification of the case. In combination with the **Case Topic** the case can be routed to a specific queue where the case can be resolved by subject-matter experts.

9 Subject

Subject 403(b) Deductions Are Incorrect

The **Subject** field allows the case originator to further refine the description of the case. This field also appears on the Cases screen with the case number.

10 Description

Description Employee submitted new 403(b) Salary Reduction Agreement to increase employee contribution, but last pay stub did not show new increased amount.

The **Description** field is where the details of the case are entered. A well developed description will provide the necessary detail for the case to be resolved. The description is included in an email to the contact if Send Notification Email to Contact is selected.

11 Internal Comments

Internal Comments Employee had contacted her manager. Manager referred employee to ERC.

Internal Comments are intended for internal use are NOT included in the email to the contact.

12 Options

Optional

- Assign using active assignment rules
- Send notification email to contact

With the **Assign Using Active Assignment Rules** checkbox selected, the case will be routed to the queue identified by the **Case Topic** and **Case Topic - Detail**. If the originator of the case (current Case Owner) chooses to retain control of the case, they can do so by unchecking the checkbox.

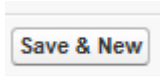
The **Send Notification Email to Contact** checkbox, by default, is unchecked. If the Case Owner decides to send this notification to the contact, they must check the checkbox.

13 Save

Save

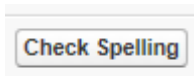
Clicking the **Save** button saves the case and have the system assign a case number to the case.

14 Save & New



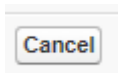
Clicking **Save & New** saves the case (system assigns case number) and creates a new case using the same contact information. Use this option if the contact has a second issue that is related to the first case or has a second unrelated issue.

15 Check Spelling



Unlike many word processors, Salesforce does not do simultaneous spell checking. If you want to spellcheck your case, you must click the **Check Spelling** button.

16 Cancel



Click Cancel to cancel the current case prior to assigning a case number.

Open an Existing Case

View (Cases) 1

Recent Cases 2

Existing Case Entry 3

Display Selection 4

Cases Home

View: All Open Cases Go! Clone | Create New View

Recent Cases New Recently Viewed

Case Number	Subject	Date/Time Opened	Priority
00001039	403(b) Deductions Are Incorrect	3/2/2014 9:17 PM	High
00001036	Can I change...	2/28/2014 2:36 PM	Medium
00001015	Coanos Report Edit	2/5/2014 4:56 PM	High
00001031	Benefits Changes	2/25/2014 10:08 AM	High
00001024	403b Eligibility	2/10/2014 3:44 PM	Medium
00001006	Qualify for Tuition Assistance	1/17/2014 3:20 PM	Medium
00001028	I'm going from Union to a Non UNION POSITION	2/10/2014 3:52 PM	Medium
00001022	Attaching Resume to Application	2/10/2014 8:34 AM	Medium
00001016	Retiring From University Service	2/6/2014 1:39 PM	Medium
00001017	Retirement Savings Plan	2/6/2014 1:49 PM	Medium

Show 25 items

Reports

- Total Cases Created
- Total Cases Created by Agent
- Total Open Cases by Agent
- Contact Role Report
- Cases and Emails
- Case History Report
- Go to Reports »

Tools

- Mass Delete Cases

Click the Cases Tab to display the list of cases.

1 View (Cases)

View: All Open Cases Go! Clone | Create New View

The default display for the Cases Tab is to list the most recently viewed or modified cases for the user. View option enable you to view the cases by different classifications:

View: All Open Cases Go!

- All Open Cases
- Benefits
- Client Services
- Compensation
- Escalated - Service Center
- General
- My Cases
- My Open Cases
- Recently Viewed Cases
- Wellness

Recent Cases

Case Number	Subject
00001039	403(b) Deductions A
00001036	Can I change...
00001015	Coanos Report Edit

2 Recent Cases

Case Number	Subject	Date/Time Opened	Priority
00001039	403(b) Deductions Are Incorrect	3/2/2014 9:17 PM	High
00001036	Can I change...	2/28/2014 2:36 PM	Medium
00001015	Cognos Report Edit	2/5/2014 4:56 PM	High
00001031	Benefits Changes	2/25/2014 10:08 AM	High
00001024	403b Fliability	2/10/2014 3:44 PM	Medium

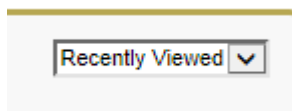
The most recently viewed case appears at the top of the list.

3 Existing Case Entry

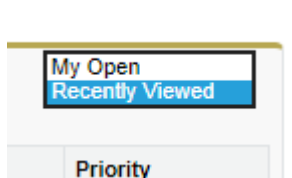
Case Number	Subject	Date/Time Opened	Priority
00001039	403(b) Deductions Are Incorrect	3/2/2014 9:17 PM	High

When you locate the desired case, click either the **Case Number** or **Subject** to open the case.

4 Display Selection



By clicking the **Display Selection**, you can select **Recently Viewed** cases to display cases you have viewed recently (whether you are the owner or not) or **My Open** (cases) to display only cases that you own.



Viewing an Existing Case

Once you have located a case on the cases home or list pages, click the case name to display the details.

1 Case Number

00001039 [Edit](#) [Benefits \[Change\]](#)

2 Case Action Buttons

[Parent Case](#)

These buttons appear at the top of the displayed case and near the center of the case layout. They provide editing functionality with regard to the case. They will be addressed in another section.

3 Case Detail

(313) 577-9341 [Parent Case](#)
[d1150@wayne.edu](#)

403(b) Deductions Are Incorrect

This section displays summary information about the case:

Case Owner: This field contains the current case owner. If you have created the case and have not re-assigned the case to another user, your name will appear here.

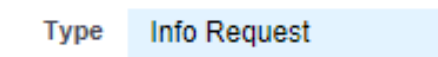
Case Number: The case number is the system-assigned number given to the case when it was created.

Contact Name: This is the individual who initiated the contact. If there is a name in the field, it is the name of a qualified WSU employee. If the field is blank, the interaction was initiated by an individual who is NOT a qualified WSU employee. The name of this individual will appear in the Subject field of the case comments. The Subject field can be viewed in the **Additional Information** section of the displayed case.

Contact Phone: The contact phone number of the WSU employee who initiated the contact.
Note: The contact phone number for a Non-WSU employee who initiates a contact will be in the **Description** field of the displayed case.

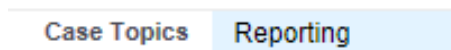
Contact Email: The email address of the WSU employee who initiated the contact.
Note: The email address for a Non-WSU employee who initiates a contact will be in the **Description** field of the displayed case.

Type (of contact): The Type field establishes the type of contact.
Example:



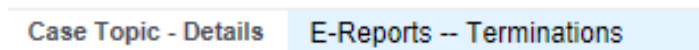
Case Topics: Case Topic classifies the type of contact into general categories.

Example: Employee Benefits



Case Topic - Details: Case Topic - Details further classifies the contact into specific areas of the topic.

Example: Retirement Savings Plans



Parent Case: If the currently displayed case does not have a related case(s), this field will be blank. If the currently displayed case is related to and is subordinate to another case, the other case will be the Parent Case and its case number will be displayed here.

4

Additional Information

(b) Deductions Are Incorrect
Employee submitted new 403(b) Salary Reductio

A right-pointing arrow next to a section title indicates that section is collapsed. To expand the section and display its content, click the right-pointing arrow. To collapse a section to hide its contents, click the down-pointing arrow.

▼ Additional Information	
Status	New
Case Origin	Phone
Priority	High
Subject	Cognos Report Edit
Description	Needs additional information on report to identify employees whose assignment has ended.
Date/Time Opened	2/5/2014 4:56 PM
Date/Time Closed	

Status: Indicates the status of the currently displayed case. Status indicators are: New, On Hold, Escalated and Closed.

Case Origin: Describes how the contact was initiated. Methods of originating cases include: Phone, Walk-in, Email, Mail (US Postal) and Web.

Priority: Importance indicators include: High, Medium and Low

Subject: This field enable you to clearly describe the purpose of the contact.

Description: The Description field allows you to further define the case.

Date/Time Opened: This field indicates the date and time the case was created.

Date/Time Closed: This field indicates the date and time the case was resolved and closed.

5

System Information

2014 9:17 PM

A right-pointing arrow next to a section title indicates that section is collapsed. To expand the section and display its content, click the right-pointing arrow. To collapse a section to hide its contents, click the down-pointing arrow.

▼ System Information	
Created By	Deborah Foster , 2/5/2014 4:56 PM
Last Modified By	Les Nolan , 2/27/2014 4:07 PM
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Close Case"/> <input type="button" value="Clone"/>	

6

Case Comments

Nolan, 3/2/2014 9:17 PM Last Modified By: [Les Nolan](#), 3/2/2014 9:17 PM

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

[New](#) [Case Comments Help](#) ?

Comment

This section provides a section for various users to add, edit or delete comments relative to the case. These comments can remain private or can be made public to all users.

7 Case History

Comments

Created By: [Les Nolan](#) (3/2/2014 9:17 PM)
Employee had contacted her manager. Manager referred employee to ERC.

[Case History Help](#) ?

User	Action
Les Nolan	Changed Owner (Assignment) from Les Nolan to Benefits.

The Case History tracks changes to the case. Any time a user modifies any of the standard or custom fields a new entry is added to the Case History related area. All entries include the date, time, nature of the change, and who made the change.

8 Related Cases

Created.

[New Case](#) [Change Owner](#)

[Related Cases Help](#) ?

The Related Cases list displays all of the cases directly below a parent case in a case hierarchy. Cases can be associated with each other via the Parent Case lookup field on a case edit page. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of similar cases for easy tracking.

9 Solutions

v Suggested Solutions | or | [Find Solution](#) [Solutions Help](#) ?

This section links to a list of Solutions. The search function searches all fields that exist on a solution.

10 Open Activities

[New Task](#) [New Event](#)

[Open Activities Help](#) ?

This area displays all open tasks and events that are associated with this case.

11 Activity History

Activity History

[Log a Call](#) [Mail Merge](#) [Activity History Help ?](#)

<TODO>: Insert description text here...

12 Attachments

Attachments

[Attach File](#) [Attachments Help ?](#)

<TODO>: Insert description text here...

Editing an Existing Case

The screenshot shows a web interface for editing a case. At the top, the case ID is 00001016. There are three blue callouts: '1 Case Edit' pointing to the 'Edit' button in the 'Case Detail' section; '2 Field Locked' pointing to a lock icon on the 'Case Number' field; and '3 Edit Field' pointing to a pencil icon on the 'Contact Name' field. The interface includes sections for Case Detail, Additional Information, System Information, Case Comments, Case History, Related Cases, Solutions, Open Activities, Activity History, and Attachments. The 'Case Detail' section shows fields for Case Owner, Case Number, Contact Name, Contact Phone, and Contact Email. The 'Additional Information' section shows Status, Case Origin, Priority, and Subject. The 'System Information' section shows Created By and Last Modified By. The 'Case History' section shows a log of actions. The 'Related Cases' section shows a table of related cases. The 'Solutions' section shows a search for solutions. The 'Open Activities' section shows a search for open activities. The 'Activity History' section shows a search for activity history. The 'Attachments' section shows a search for attachments.


There are two ways to edit a case: case edit mode or edit field by field.

1 Case Edit

Edit



Clicking the Edit button will place the entire case into edit mode. All editable fields will be displayed.

2 Field Locked

Case Owner	General [Change]	
Case Number	00001016 [View Hierarchy]	
Contact Name	Elizabeth Rager	

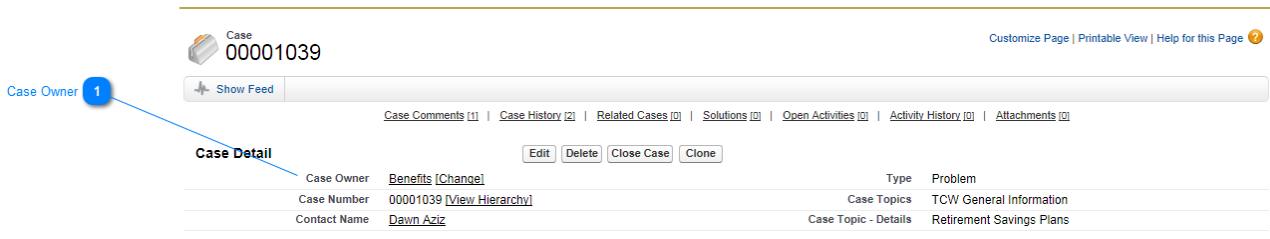
If a **Closed Lock** icon appears near a field when it has been selected, that field cannot be edited.

3 Edit Field

Case Number	00001016 [View Hierarchy]		
Contact Name	Elizabeth Rager		

If a **Pencil Icon** appears near a field when it has been selected, you can enable the field for editing by **double-clicking** the pencil icon.

Re-assigning a Case To a New Owner

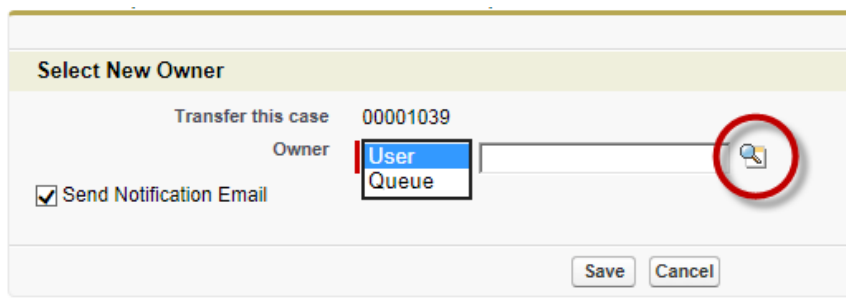


To re-assign a case to a new owner, first open the desired case.

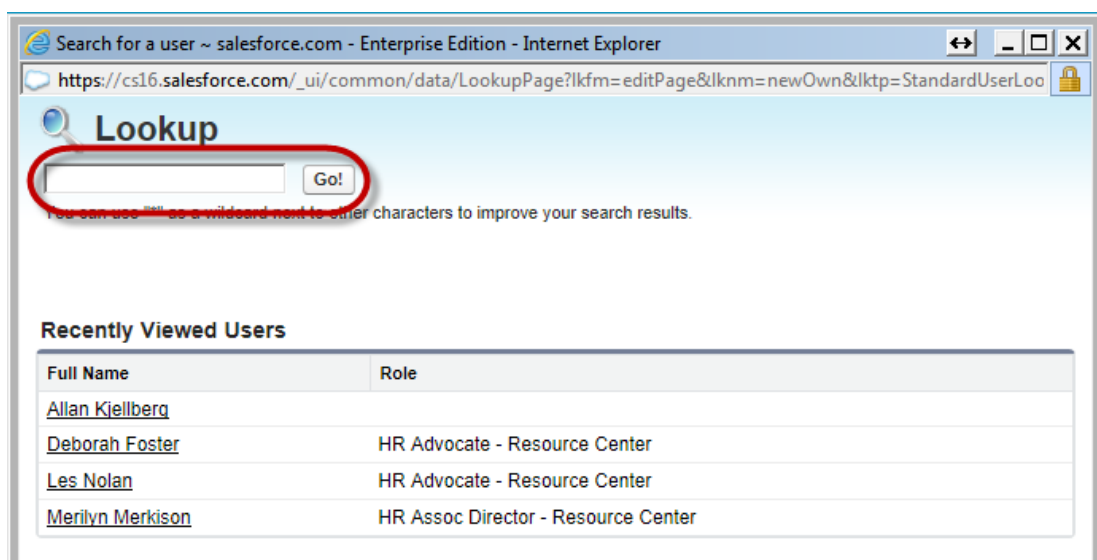
1 Case Owner

Case Owner [Benefits \[Change\]](#)

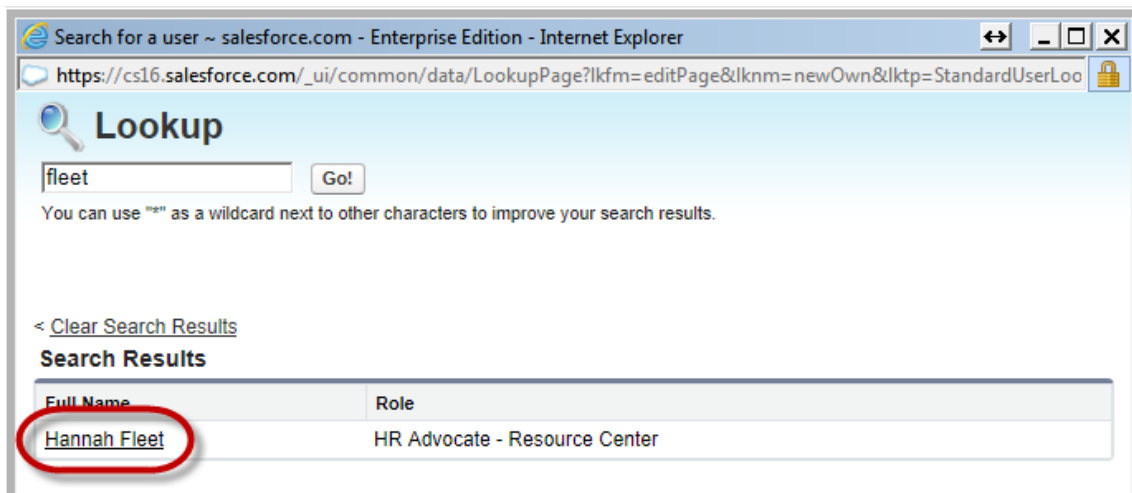
Click the **Change** link to the right of the current **Case Owner** (Benefits). The Change Case Owner screen displays. There are two options for re-assigning the case. The case can be re-assigned to a specific **User** or to a **Case Queue**. If re-assigning to another user, click the **Look-up** button to the right of the look-up field.



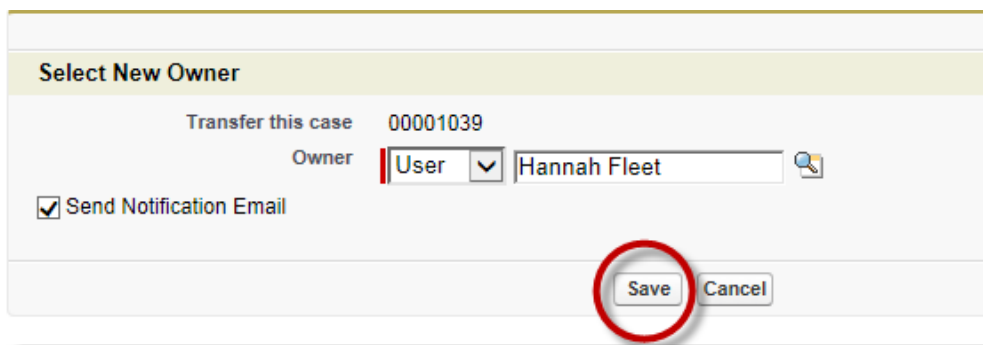
A **Lookup** screen will display. Enter the new owners last name in the Lookup field and click the **Go!** button.



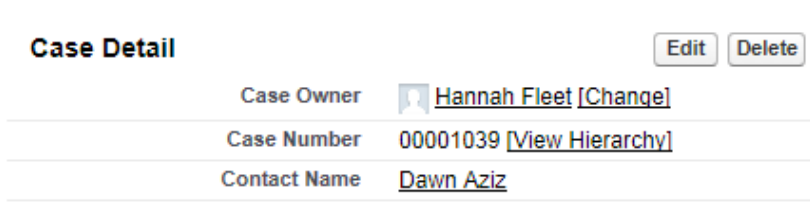
Click the name of the user you want to assign as the new Case Owner.



Click **Save** to complete the re-assignment.



The case has been re-assigned to a new Case Owner.



Routing a Case To a New Response Queue

Case Owner **1**

Case 00001028

Show Feed

Back to List: Cases

Case Comments | Case History | Related Cases | Solutions | Open Activities | Activity History | Attachments

Case Detail

Case Owner: Les Nolan [Change] Type

Case Number: 00001028 [View Hierarchy] Case Topics

Contact Name: Kathleen Blumberg Case Topic - Details

Contact Phone: (313) 577-1578 Parent Case

Contact Email: kb.0229@wayne.edu

To re-assign a case to a **Response Queue**, first open the desired case.

1 Case Owner

Case Owner Les Nolan [Change]

Click the **Change** link to the right of the current Case Owner's name. The **Change Case Owner** screen will display.

Click the down arrow for the **Owner** field and select **Queue** from the drop-down list, then click the **Owner Lookup** button.

Select New Owner

Transfer this case 00001028

Owner Queue

Send Notification Email

Save Cancel

When the **Lookup** screen displays, select the appropriate **Queue** from the **Search Results** list and click the **Go!** button.

Lookup

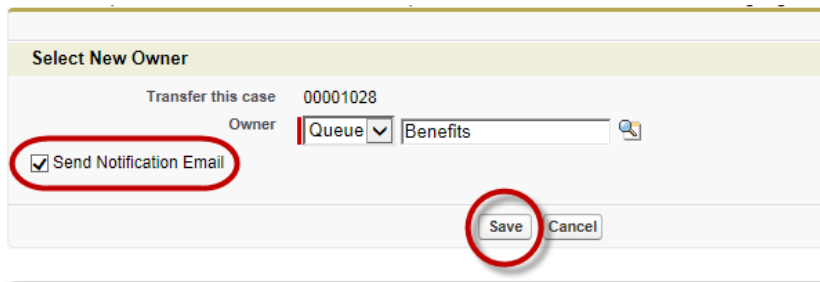
Benefits **Go!**

You can use * as a wildcard next to other characters to improve your search results.

Search Results

Queue Name
Benefits
Client Services
Compensation
Escalated - Service Center
General
Wellness

Verify the **Send Notification Email** checkbox is selected (Queue owners will receive notification of new case in queue) and click **Save**.



Select New Owner

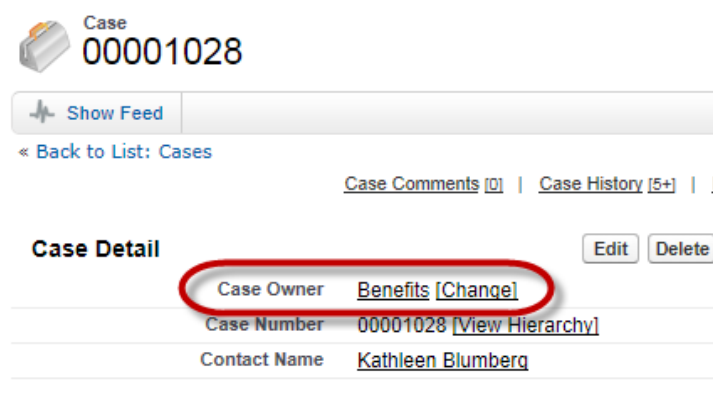
Transfer this case 00001028

Owner Queue Benefits

Send Notification Email

Save Cancel

Case Owner has been updated.



Case 00001028

Show Feed

< Back to List: Cases

Case Comments [0] | Case History [5+] | F

Case Detail Edit Delete

Case Owner	Benefits [Change]
Case Number	00001028 [View Hierarchy]
Contact Name	Kathleen Blumberg

Closing a Solved Case

The screenshot shows the 'Close Case' edit screen. It is divided into two main sections: 'Case Information' and 'Solution Information'. The 'Case Information' section includes fields for Status (set to 'Closed'), Case Reason (set to 'Employee Benefits'), Internal Comments (set to 'None'), Case Topic Detail (set to 'Employee Benefits'), Case Topics (set to 'TCW General Information'), and Case Topic - Details (set to 'Life Insurance'). The 'Solution Information' section includes a checkbox for 'Submit to public solutions' (checked), a Solution Title field (set to 'Who did I list as beneficiaries?'), and a Solution Details text area (set to 'Obtained employee's Banner ID and displayed the employee's current Group Life Insurance Enrollment/Change Form. Provided employee with current beneficiaries.'). At the bottom of each section are 'Save' and 'Cancel' buttons. Numbered callouts 1-10 point to these specific elements.

To close a case, open the desired case and click either **Close Case** button. A Close Case edit screen will display.

1 Status

A close-up of the 'Status' dropdown menu. The word 'Status' is on the left, and the dropdown is set to 'Closed' with a downward arrow on the right.

Change **Status** to **Closed**.

2 Case Reason

A close-up of the 'Case Reason' dropdown menu. The text 'Case Reason' is on the left, and the dropdown is set to 'Employee Benefits' with a downward arrow on the right.

Select a **Case Reason** from the drop-down list.

3 Internal Comments

A close-up of the 'Internal Comments' text area. The text 'Internal Comments' is on the left, and the text area contains the word 'None'. There are scroll arrows on the right side of the text area.

Enter any additional closing **Internal Comments** (contact does not see these comments). Enter **None** if there are no additional closing comments.

4 Case Topic Detail

Case Topic Detail

Select the appropriate **Case Topic Detail** from the drop-down list.

5 Case Topic

Case Topics

Select the appropriate **Case Topic** from the pull-down list.

6 Case Topic - Detail

Case Topic - Details

Select the appropriate **Case Topic - Detail** from the drop-down list.

7 Submit to Public Solutions

Submit to public solutions

By leaving the **Submit to Public Solutions** checkbox checked, the **Solution Title** and **Solution Details** will be will create a **Solution** and post it in the Solutions library.

8 Solution Title

Solution Title

Enter a **Solution Title**. If this solution will be added to the library of solution, please word the title as a **question**.

9 Solution Details

Solution Details

Enter Solution Details here. If this solution will be added to the library of solution, please list the action that were taken to resolve this issue.

10 Save

Click **Save** to save and close the **Close Case** edit screen.

Working With Tasks

In the process of resolving a case, you may need to take specific actions, e.g. make a phone call, send an email, schedule a meeting, etc. These actions can be entered into Salesforce as Tasks. A Task can be related to a case, a contact or just a task you must perform that is not related to a specific case or contact.

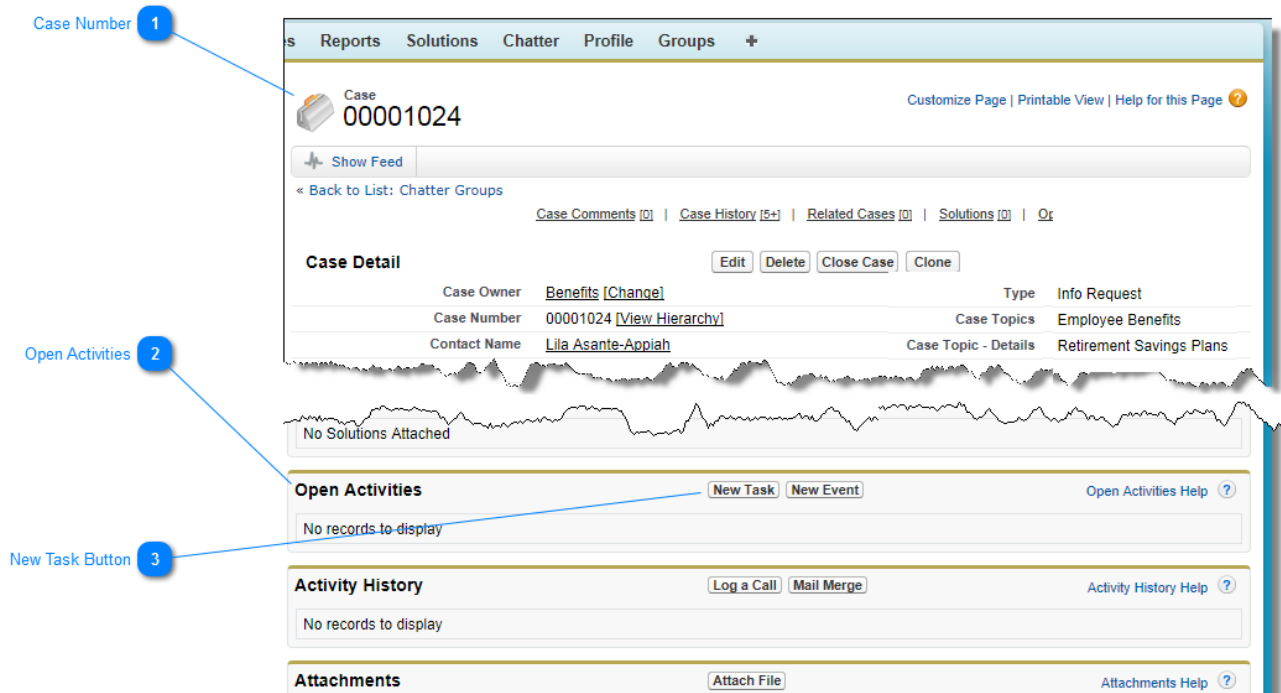
A New Tasks can be created from:

- Home Tab
- Navigation Panel
- Open Case
- Open Contact

Tasks created from the **Home** tab or **Create New** (Navigation Panel), are not automatically related to a case or a contact. To relate these tasks to a case or a contact, you must manually create the relationship.

Tasks that are created from an open case or open contact are automatically related to the case or contact from which they were created.

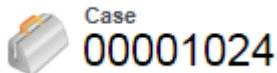
Creating a New Task From an Open Case



In the process of resolving an issue, you may find that you must take an action that is outside the ordinary steps for resolving this type of issue. You may need to make a phone call to a department outside of Human Resources or to a vendor. You may have to meet with someone face-to-face to get an answer. These and many other actions are referred to as **Tasks**.

When you create a **Task** from an open **Case**, some of the fields will auto-populate from the Case data.

1 Case Number



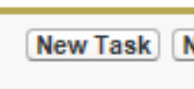
Open the desired case from the Case tab, Recent Items, or from the Contacts record.

2 Open Activities



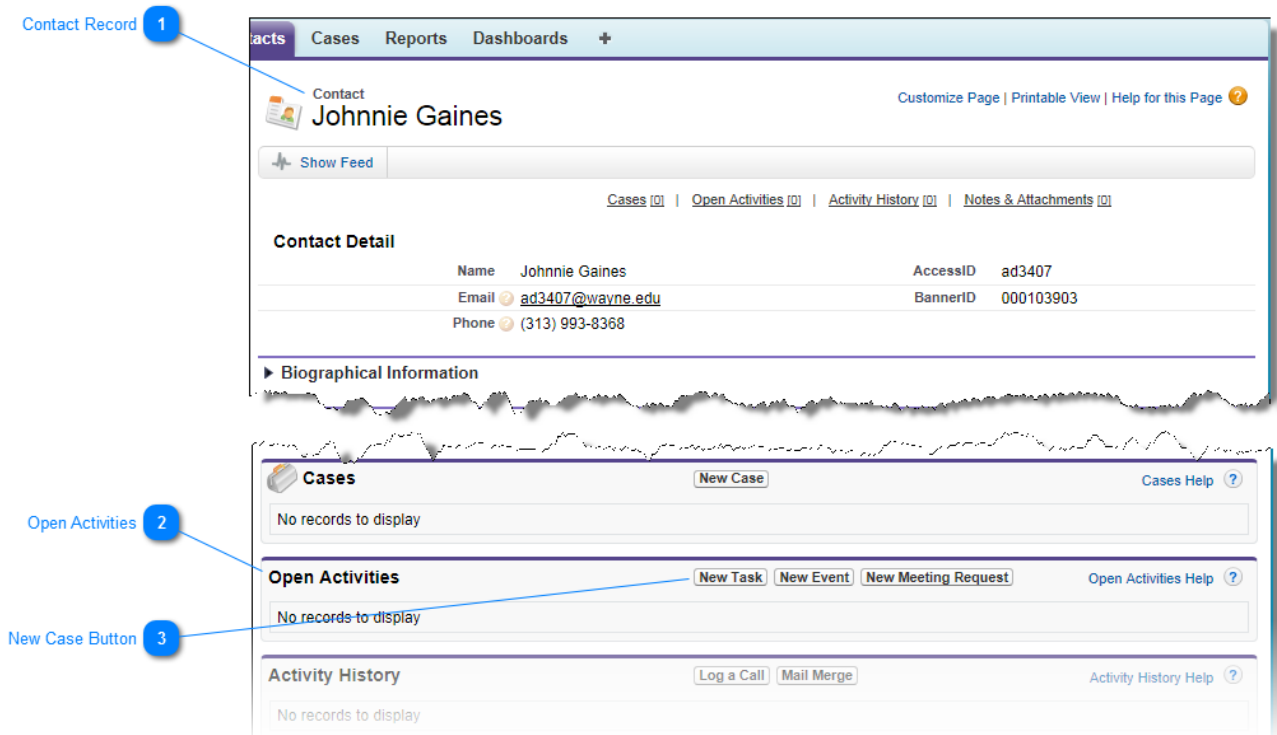
Scroll to the **Open Activities** section.

3 New Task Button



Click the New Task button.

Creating a New Task From an Open Contact



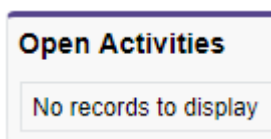
If a Task relates to an employee but not a case, you can create the Task from the employee's contact screen.

1 Contact Record



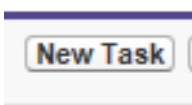
Open the desired **Contact** record.

2 Open Activities



Scroll to the **Open Activities** section.

3 New Case Button



Click the **New Case** button.

Creating a New Task From The Home Tab or Navigation Panel

The screenshot shows the AllansB system home page. The navigation bar at the top includes Home, Chatter, Profile, Contacts, Cases, Reports, and Dashboards. The main content area is divided into several sections:

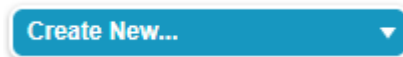
- Quick Links:** Wayne Connect, Pipeline, Banner, Help System.
- Create New...:** A dropdown menu with options: Event, Task, Case, Report.
- Users Logged In:** A gauge chart showing the sum of active users over the last 7 days, with a needle pointing to 3.
- My Tasks:** A table with columns Complete, Date, and Subject. One task is listed: X, 2/27/2014, Counseling Policy for Rep Emp.
- Calendar:** A section for Scheduled Meetings and Requested Meetings, showing no events for the next 7 days.

Annotations on the left side of the screenshot indicate the steps for creating a new task:

- 1 Create New:** Points to the 'Create New...' dropdown menu.
- 2 Task Option:** Points to the 'Task' option in the dropdown menu.

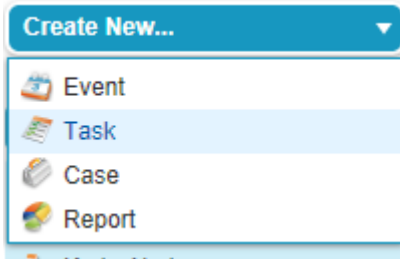
If a Task is not related to a contact or case, you can create a New Task from Create New on the Navigation Panel. However, if this task is related to a case or a contact, you must be entered information manually

1 Create New



Click the **Create New** pull-down menu.

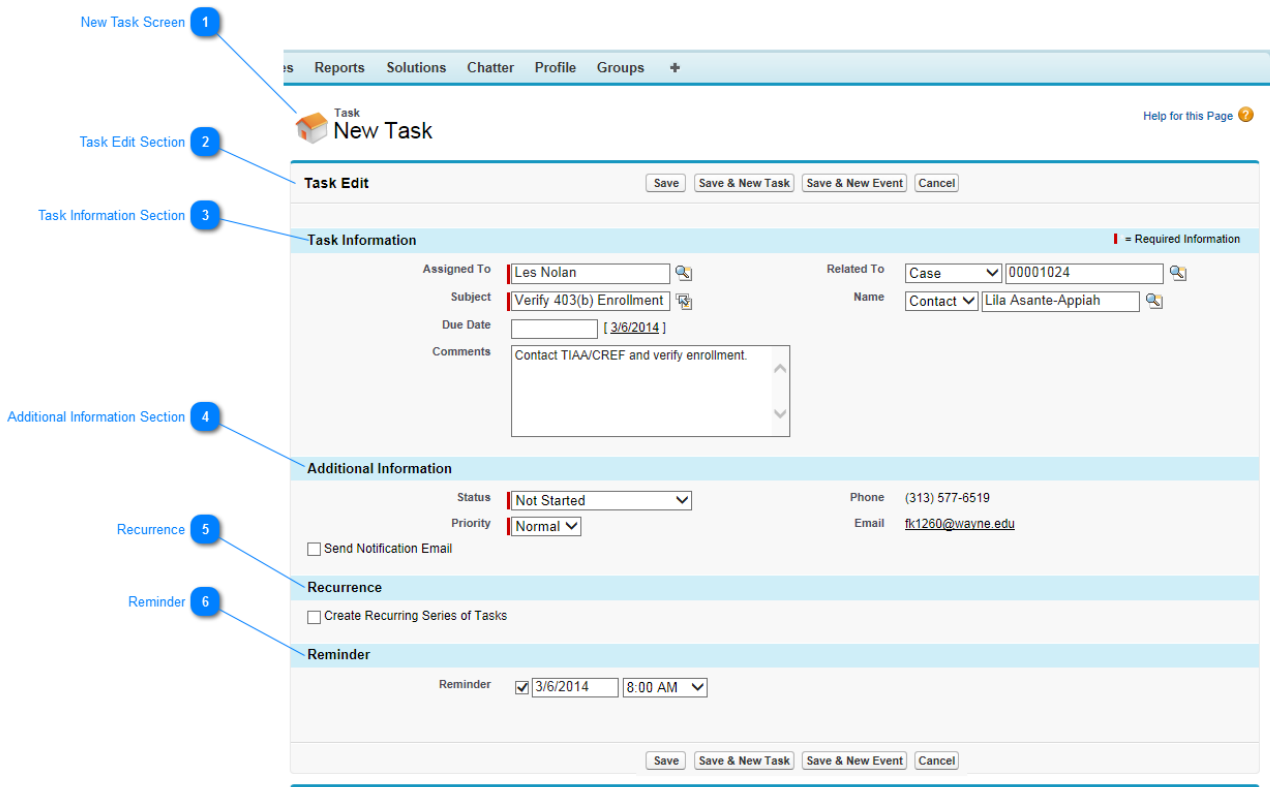
2 Task Option



Click the **Task** option. The **New Task** screen will display. Because this Task was not created from a Case or Contact screen, the fields that would be auto-populated are blank. If this Task is related to a Case or Contact you must manually enter the information.

A screenshot of the "New Task" form interface. The title bar shows "Task New Task" and "Help for this Page". Below the title bar is a "Task Edit" section with buttons for "Save", "Save & New Task", "Save & New Event", and "Cancel". The main form area is divided into two sections: "Task Information" and "Additional Information". The "Task Information" section contains fields for "Assigned To" (with "Les Nolan" entered), "Subject", "Due Date" (with "3/7/2014" entered), "Comments" (a text area), "Related To" (a dropdown menu with "Account" selected), and "Name". A legend indicates that a red vertical bar next to a field name signifies "Required Information". The "Additional Information" section is currently empty.

Completing a New Task



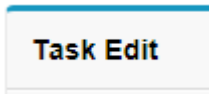
<TODO>: Insert description text here... And don't forget to add keyword for this topic

1 New Task Screen



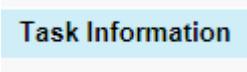
Notifies you that this is the screen for creating a New Task.

2 Task Edit Section



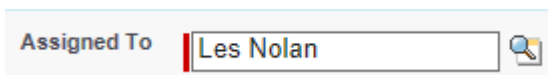
Indicates the screen is in Edit Mode.

3 Task Information Section



The following fields auto-populate from the Case information:

Assigned To field populates with the name of the user who is creating the New Task.



Related To and **Name** fields populate with data from the Case.

Related To	Case	00001024
Name	Contact	Lila Asante-Appiah

Complete the following fields with the appropriate information.

Subject	Verify 403(b) Enrollment
Due Date	[3/6/2014]
Comments	Contact TIAA/CREF and verify enrollment.

4 Additional Information Section

Additional Information

Phone and Email Fields

The following fields auto-populate from the Case information:

Phone	(313) 577-6519
Email	fk1260@wayne.edu

Status Field

Click the drop-down menu in the **Status** field.

Status	Not Started
--------	-------------

Select the appropriate status.

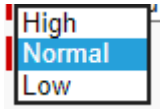
Not Started
In Progress
Completed
Waiting on someone else
Deferred

Priority Field

Click the drop-down menu in the **Priority** field.

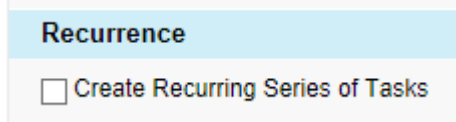
Priority	Normal
----------	--------

Select the appropriate Priority.



A dropdown menu with three options: High, Normal, and Low. The 'Normal' option is currently selected and highlighted in blue.

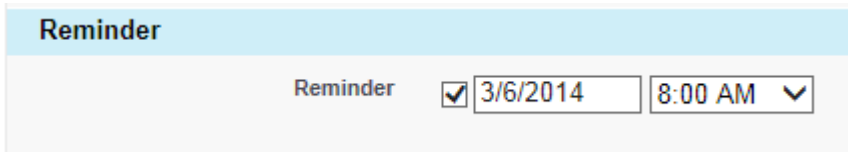
5 Recurrence



A panel titled 'Recurrence' containing a checkbox labeled 'Create Recurring Series of Tasks'.

<TODO>: Insert description text here...

6 Reminder



A panel titled 'Reminder' containing a checkbox labeled 'Reminder', a date input field with the value '3/6/2014', and a time dropdown menu with the value '8:00 AM'.

<TODO>: Insert description text here...

Working With Events

As with Tasks, In the process of resolving a case, you may need to schedule specific events, e.g. make a phone call on a specific day, meet with an individual who is out of the office and will return on a specific day, etc. Dates and times can be entered into Salesforce as Events. An Event can be related to a case, a contact or just a day you must perform an action that is not related to a specific case or contact.

A New Events can be created from:

- Home Tab
- Navigation Panel
- Open Case
- Open Contact

Events that are created from an **Open Case** or **Open Contact** are automatically related to the case or contact from which they were created.

Events created from the **Home** tab or **Create New** (Navigation Panel), are not automatically related to a case or a contact. To relate these Events to a case or a contact, you must manually create the relationship.

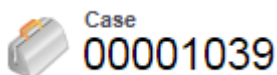
Creating a New Event From an Open Case

The screenshot shows a web interface for a case management system. At the top, there are navigation tabs: 'acts', 'Cases', 'Reports', and 'Dashboards'. Below this, the case details for Case 00001039 are displayed, including the Case Owner (Hannah Fleet) and Case Number (00001039). The 'Open Activities' section is highlighted with a blue circle and a line pointing to the 'New Event' button. The 'New Event' button is also highlighted with a blue circle and a line pointing to it from the 'New Event Button' label. The 'Open Activities' section shows 'No records to display' and a 'New Task' button. The 'Activity History' section also shows 'No records to display' and a 'Log a Call' button. The 'Attachments' section shows an 'Attach File' button.

In the process of resolving an issue, you may find that you must schedule a date and time for an action to take place. You may need to make a phone call to a department outside of Human Resources or to a vendor who is not currently available. You may have to meet with someone who is out of the office and will not return for a day or two. These and many other scheduled actions are referred to as **Events**.

When you create an **Event** from an open **Case**, some of the fields will auto-populate from the Case data.

1 Case Number



Open the related **Case**.

2 Open Activities

Open Activities

Scroll to the **Open Activities** section.

3 New Event Button

New Event

Click the **New Event** button. The New Event screen will display. In the screenshot below, you can see the fields that were auto-populated.

Calendar Help for this Page ?

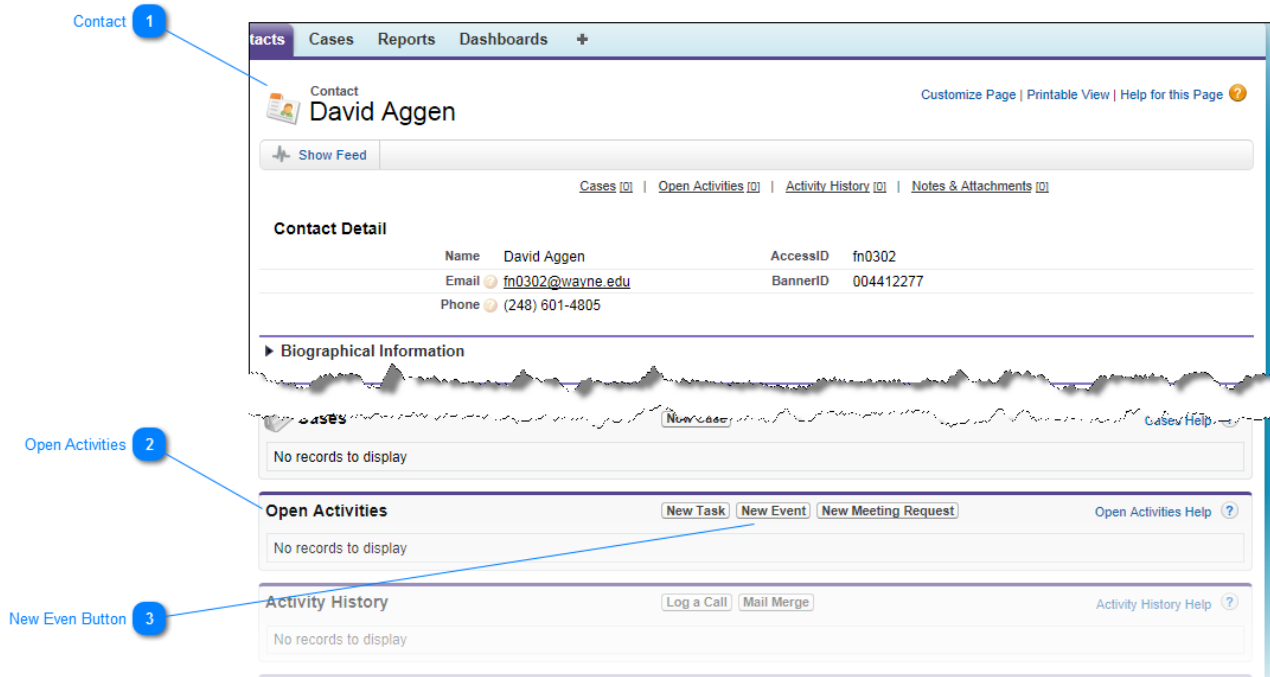
New Event

Event Edit Save Save & New Task Save & New Event Cancel

Calendar Details = Required Information

Assigned To	Les Nolan	Related To	Case	00001039
Subject		Name	Dawn Aziz	[Add to Invitees]
All Day Event	<input type="checkbox"/>	Private	<input type="checkbox"/>	
Start	3/7/2014	11:00 AM	[10:20 AM]	
End	3/7/2014	12:00 PM	[10:20 AM]	

Creating an Event From an Open Contact



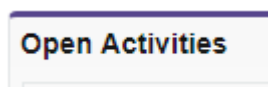
If a **Event** relates to an employee but not a case, you can create the **Event** from the employee's contact screen.

1 Contact



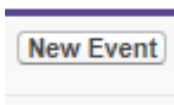
Open the desired **Contact**.

2 Open Activities



Scroll to the **Open Activities** section.

3 New Even Button



Click the New Event button. The New Event screen will display.



Event Edit

[Save](#) [Save & New Task](#) [Save & New Event](#) [Cancel](#)

Calendar Details

! = Required Information

Assigned To	<input type="text" value="Les Nolan"/>		Related To	<input type="text" value="Account"/>	
Subject	<input type="text"/>		Name	<input type="text" value="David Aggen"/>	[Add to Invitees]
All Day Event	<input type="checkbox"/>				
Start	<input type="text" value="3/7/2014"/>	<input type="text" value="11:00 AM"/>	<input type="text" value="[10:46 AM]"/>		
End	<input type="text" value="3/7/2014"/>	<input type="text" value="12:00 PM"/>	<input type="text" value="[10:46 AM]"/>		

Calendar Details

Creating a New Event From The Home Tab or Navigation Panel

00001024

<TODO>: Insert description text here... And don't forget to add keyword for this topic

Working With Files

Case 00001016

Show Feed

Back to List: Cases

Case Comments (0) | Case History (2) | Related Cases (1) | Solutions (0) | Open Activities (0) | Activity History (0) | Attachments (0)

Case Detail [Edit] [Delete] [Close Case] [Clone]

Case Owner	General [Change]	Type	Service Request
Case Number	00001016 [View Hierarchy]	Case Topics	Benefit Changes
Contact Name	Elizabeth Rager	Case Topic - Details	Retiring from University Service
Contact Phone	(313) 577-6023	Parent Case	

Activity History

No records to display

Attachments [Attach File] [Attachments Help ?]

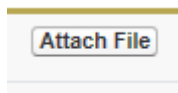
No records to display

Back To Top

Always show me more records per related list

Files (documents and forms) can be attached to a case at any time. First, open the desired case.

1 Attach File



Click the **Attach File** button. The Attach File to Case screen will display.

1. Select the File - Browse to the location of the file and select the file.
2. Click the Attach File button.
3. Click Done to return to the case.

Attach File to Case 00001016

1. Select the File

Type the path of the file or click the Browse button to find the file.

its Continuation Form.pdf [Browse...]

2. Click the "Attach File" button.

Repeat steps 1 and 2 to attach multiple files.

(When the upload is complete the file information will appear below.)

[Attach File]

3. Click the Done button to return to the previous page.

(This will cancel an in-progress upload.)

[Done]

The file is now attached to the case.

Attachments		Attach File	View All
Action	File Name		
Edit View Del	Elizabeth Rager Benefits Continuation Form.pdf		

Working With Chatter

Chatter Tab

The Chatter tab is your collaboration home base and gives you instant access to most of the collaboration features in Chatter.

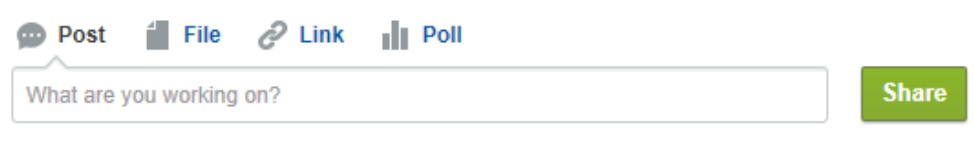
From the Chatter tab you can:

- [Make a post](#) that's shared with people who follow you, or comment on someone else's post.
- [Like posts or comments](#) to show your support.
- [Share a post](#) to your profile or to a group, or send a link to the post to other Chatter users in an email or instant message.
- [View, filter, and sort your feed](#) on the left side to view posts from people and records you follow and groups you're a member of, posts that mention you, posts you bookmarked, or all posts from your company.
- [Search the feed](#) to quickly find information in the feed posts and comments on the Chatter tab.
- [Bookmark a post](#) to keep track of future comments on the post, or to remember to follow up on the post later.
- [Add topics to a post](#) to categorize the post and give it more visibility.
- Access your [people](#), [groups](#), [files](#), and [topics](#) lists.
- [View or update your profile](#), such as your profile photo or your contact information.
- [Read or send private messages](#) that are only visible to certain people.
- [Access your favorites](#) to see the latest posts and comments for your favorite topics, list views, and Chatter feed searches.
- [View your recommendations](#) for people, groups, files, and records that closely relate to your job and interests.
- [View trending topics](#) that people are discussing in Chatter right now.
- [Invite people to join your Chatter network](#) if they don't have Salesforce licenses to use Chatter.

Here are a few examples of working with Posts.

Making a Post

Make a post to let people know what you are working on, to ask questions, and share information.

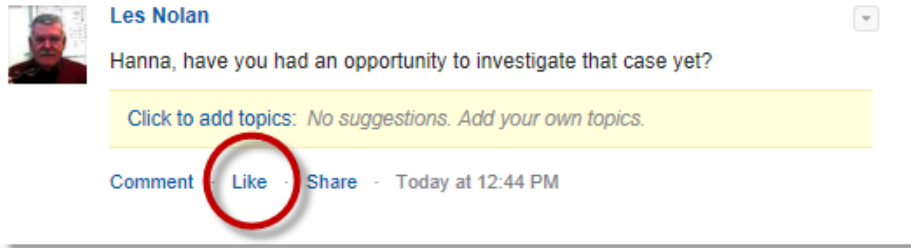


1. Above your feed, click Post or just click the text box.
2. Type your update in the text box. You can [add hashtag topics](#) and [mention people](#).
3. Below the text box, select My Followers to publish the post on your profile, or select A Group, type part of the group's name in the Search Groups field, and select the group from the drop-down list.
4. You can only select a group you're a member of.
5. Click Share.

Liking Posts and Comments

Like posts or comments to show your support and receive email notifications if others comment on that post

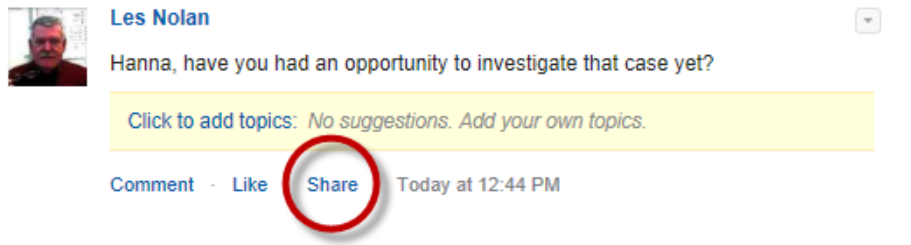
Below a post or comment, click Like.



After you click Like on a post, you receive [email notifications](#) if others comment on that post. If you click Like on a comment, only the user who posted the comment receives an email notification, but you receive an email notification for any subsequent comments.

- To stop liking a post or a comment, click Unlike. When you stop liking a post or a comment, you don't receive email notifications for subsequent comments or likes.
- View the profiles of others who have liked a post by clicking their name at the bottom of the post or comment, for example, "John Smith likes this."
- If more than three people like a post, click the link to see the full list; for example, "You, John Smith, and 2 others like this." From that list, you can follow or stop following people.
- Likes on comments show how many people have liked the comment, for example, "1 person" or "7 people". To see their names, click the link.

Sharing a Chatter Post



You can share public Chatter posts that contain text, links, or files to your profile, with a group, or using a link to the post.

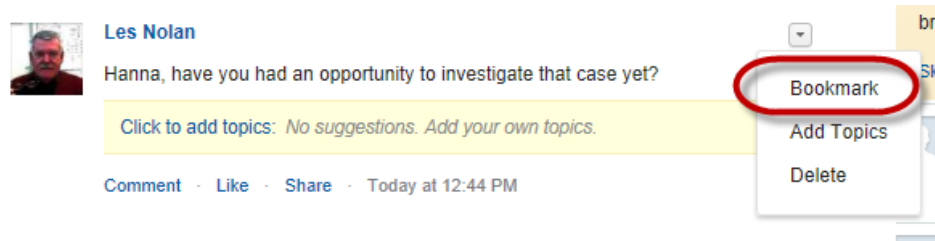
When you share a post, keep in mind:

- You can share a post to your own profile, but not to another person's profile.
- You can share the original post, including any files and attachments, but you can't share any comments or likes.
- You can comment on the shared post, but you can't edit a shared post.
- You can't share feed tracked items and custom feed items, such as approvals, dashboard snapshots, or case interactions.
- You can only share posts with a group you're a member of.
- You can share a post to a group that allows customers. However, customers and other group members can't share posts from a private group.

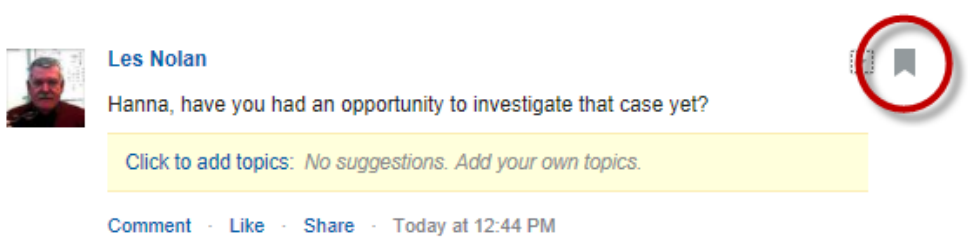
When someone shares your post, you receive an email notification. To change your email notifications, from Setup, click My Chatter Settings | Chatter Email Settings.

Bookmark a Post

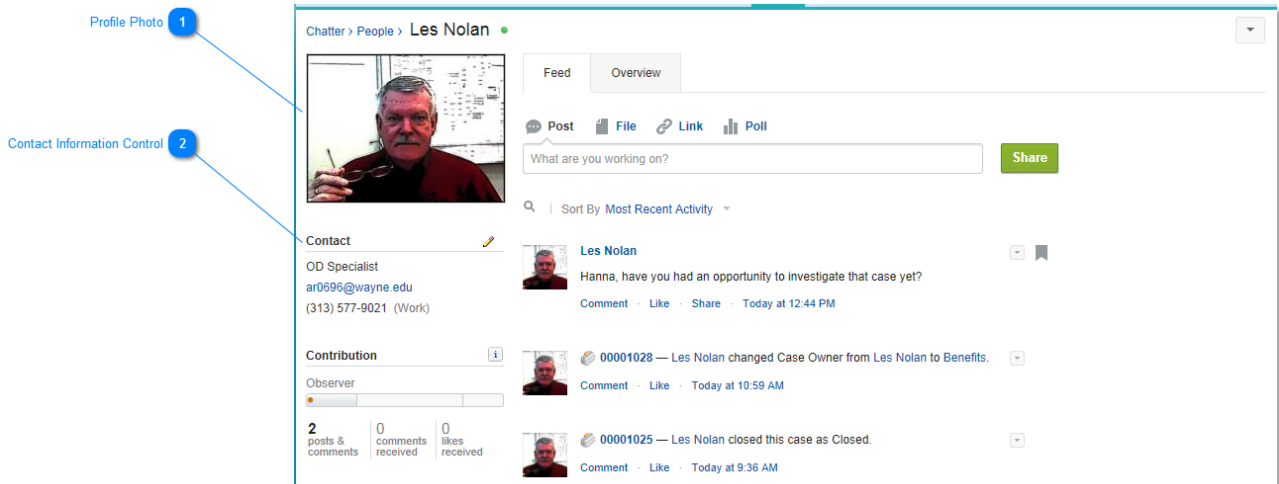
Bookmarking a post lets you keep track of posts you're interested in.



1. Click the down arrow at the top right corner of the post you want to bookmark to expand the drop-down list.
2. Click Bookmark. The bookmark icon displays next to the post to indicate that you successfully saved the post to your bookmarks.



Customizing Your Profile



Click the **Profile** tab to customize your profile.

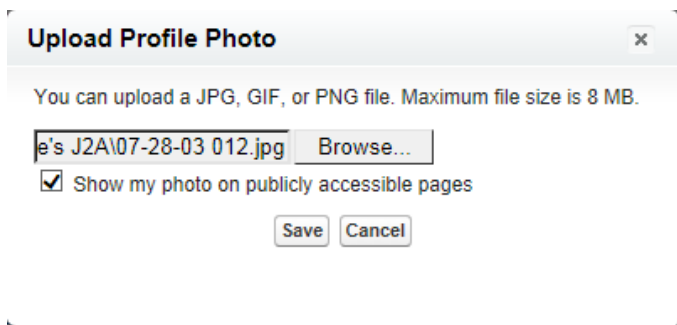
1 Profile Photo



Hover your mouse pointer over the photo placeholder or your profile photo until the Update/Delete options appear. Click **Update**.



When the **Upload Profile Photo** dialog box displays, browse your PC until you locate your profile photo. Click the **Show My Photo on Publicly Accessible Pages**, so your photo will display. Click **Save**.



Your Profile Photo has been updated.

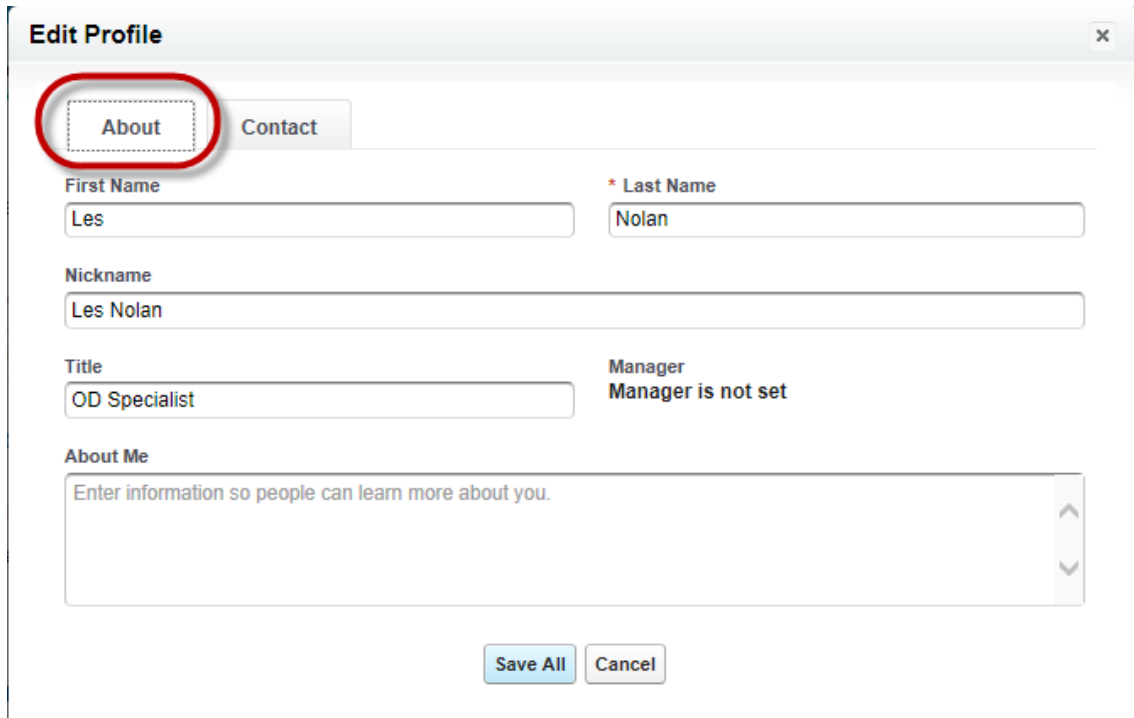
2

Contact Information Control

Contact 

To enter or edit your contact information, click the **Pencil** icon near the word **Contact**. The **Edit Profile** dialog box will display.

Before clicking the **Save All** button, you can add/edit addition information about yourself. Click the **About** tab.



The image shows a dialog box titled "Edit Profile" with a close button (X) in the top right corner. It features two tabs: "About" and "Contact". The "About" tab is selected and highlighted with a red circle. Below the tabs, there are several input fields: "First Name" with the value "Les", "* Last Name" with the value "Nolan", "Nickname" with the value "Les Nolan", "Title" with the value "OD Specialist", and "Manager" with the value "Manager is not set". At the bottom, there is a text area labeled "About Me" with the placeholder text "Enter information so people can learn more about you." and a vertical scrollbar. At the very bottom of the dialog box, there are two buttons: "Save All" and "Cancel".

Click the **Save All** button to save your changes and exit the **Edit Profile** dialog box.

CRM Process Maps

Becoming familiar with Salesforce is the easy part. How you use it in the ERC is the real challenge. This section describes the how and the when to use it to achieve its real purpose: resolve human resource issues. Using a series of workflow maps, the overall process and its segments are clearly defined.

Basic CRM Process

This process map is intended to give the user a macro vision of what the basic CRM Process looks like. In reality, there are additional decisions and actions that take place throughout the process. These decisions and actions are detailed in subsequent process maps.

