SalesForce Navigation

User guide
March 10, 2014

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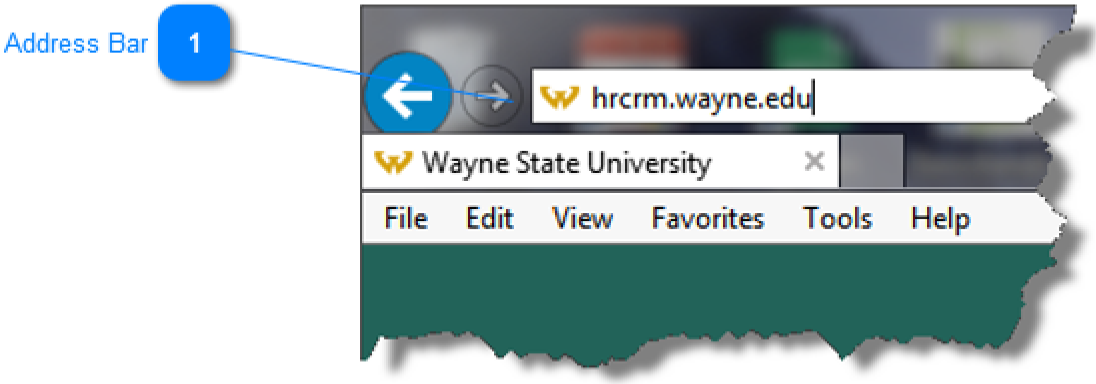
Human Resources CRM Introduction

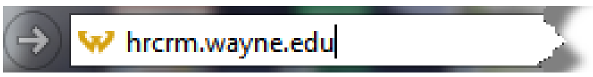
Customer Relationship Management (CRM) is a method for managing customer contacts. It was developed from a commercial perspective where businesses needed a way to keep track of their customers, the customer's contact information and interactions that occurred with these customers, e.g. sales orders, 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. Howerver, 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



1 Address Bar



Enter **hrcrm.wayne.edu** into your browser address bar. Hit the Enter key or click the Go button. A login prompt will display.

There are two configurations of the log in prompt. Which one displays will be dependent on whether or not you have an AccessID authenticated (e.g. Pipeline, Webconnect, Blackboard, etc.) session open in the same browser. If you have an authenticated session open, single sign-on is invoked. If not, you must log in with your AccessID and Pipeline password.

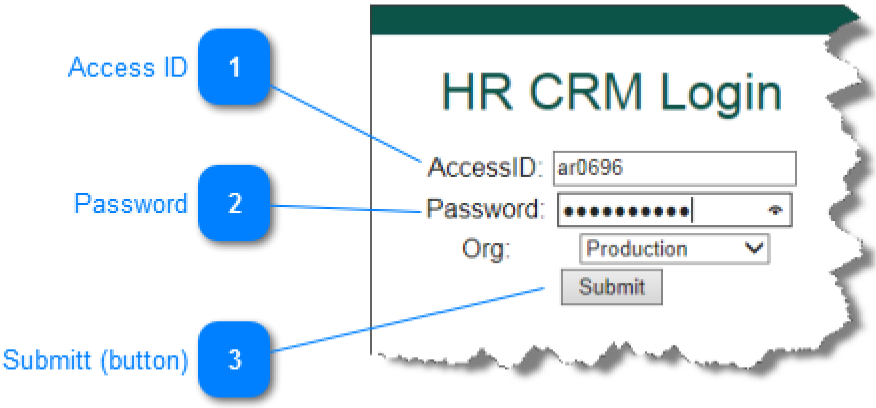
Logging Into Salesforce With Single Sign-on

If you are currently logged into Pipeline, Webconnect or Black board, single sign-on is invoked. Enter hrcrm.wayne.edu into your browser address bar and hit Enter. The prompt above will display.

1 Submit (button)

Click the **Submit** button to launch Salesforce.

Logging Into Salesforce With AccessID and Password



Enter hrcrm.wayne.edu into your browser address bar and hit Enter. When you are not logged into Pipeline, Webconnect or Blackboard, the login prompt above will display.

1 Access ID

Enter your WSU AccessID and tab to the **AccessID** field.

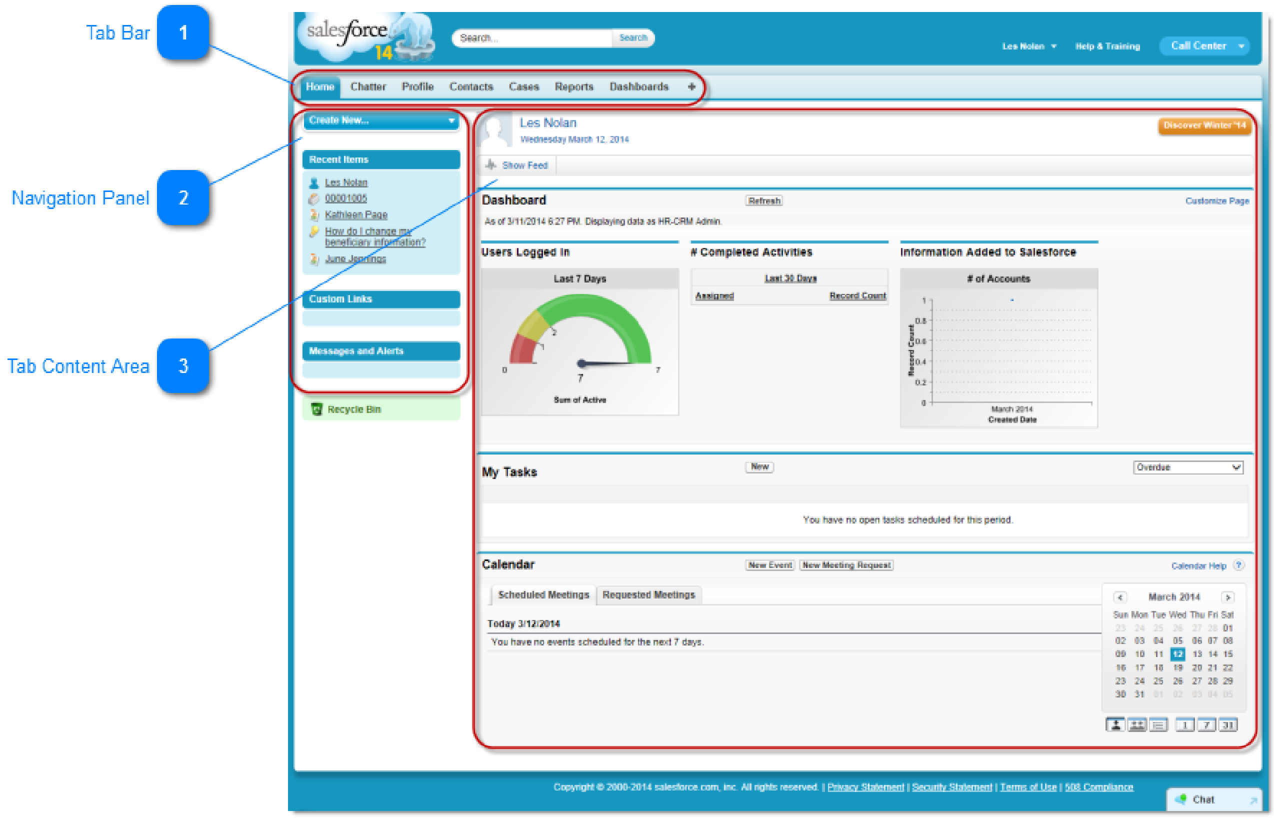
2 Password

Enter your Pipeline password into the **Password** field.

3 Submitt (button)

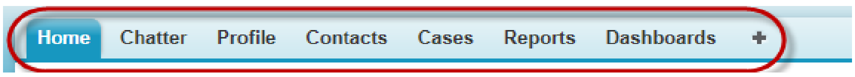
Click the Submit button to launch Salesforce.

Salesforce Application Layout



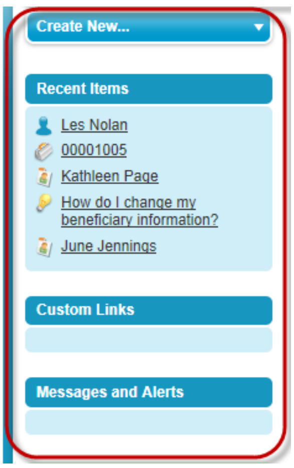
The screen layout above is the basic layout for all tabs. The content design of each tab may vary, but the overall look will remain the same.

1 Tab Bar



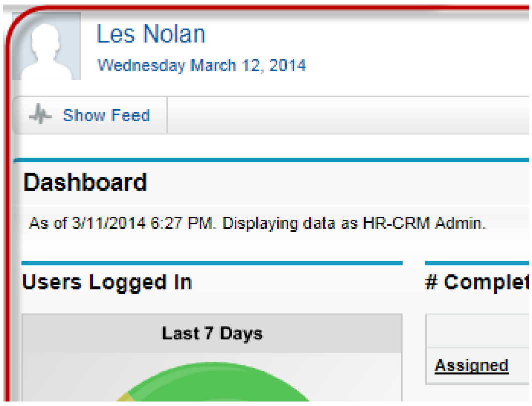
The **Tab Bar**, as shown in this graphic, displays the default layout. However, optional tabs can be added to the bar and the order of the tabs can be changed.

2 Navigation Panel



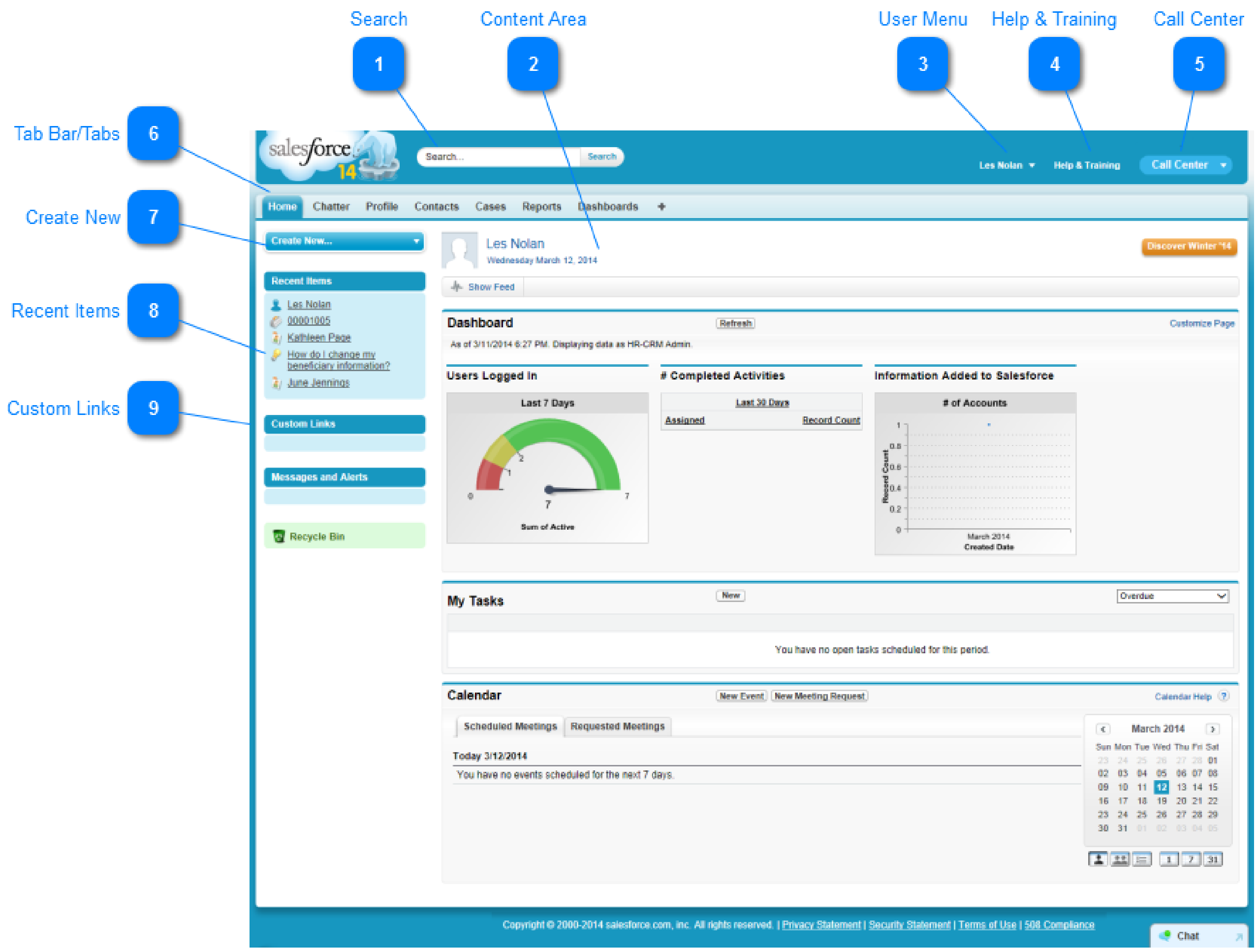
The Navigation Panel provides quick, easy access to functionality that is tab dependent.

3 Tab Content Area



This area displays the tab content.

Home Tab

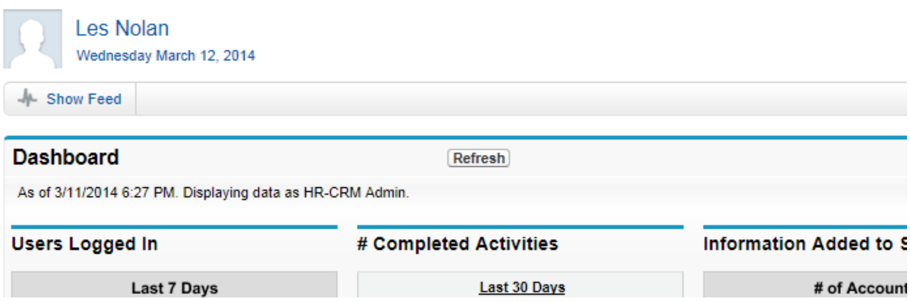


This screen will display when the user logs into SalesForce. The **Home** tab is the default "active" tab. The Dashboard area is customizable.

1 Search

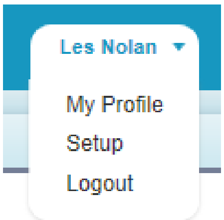
The Search funtion allows the user to search on any item or object within Salesforce, e.g. case numbers, reports, groups etc.

2 Content Area



3 User Menu

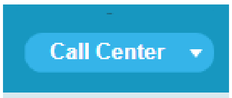
This menu enables users to create a profile, make changes to various account and desktop parameters, and log out of the current Salesforce session.



4 Help & Training

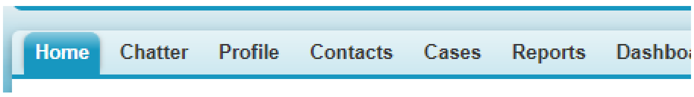
Because Salesforce CRM was developed to support a sales environment, much of the help and training is developed from a sales perspective using sales jargon. However, there are some help topics that can provide the user with good information.

5 Call Center



This function not currently used at WSU.

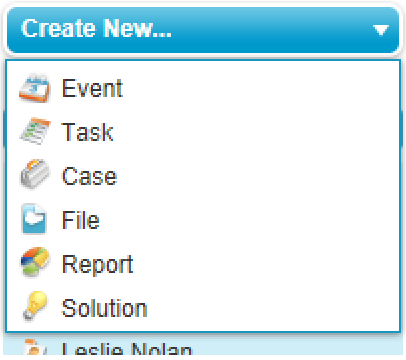
6 Tab Bar/Tabs



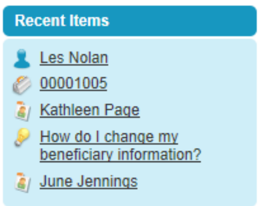
Each tab on the **Tab Bar** contains a group of related functions with a distinct layout. The **Tab Bar** is completely customizable.

7 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.

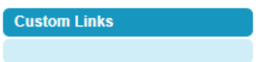


8 Recent Items



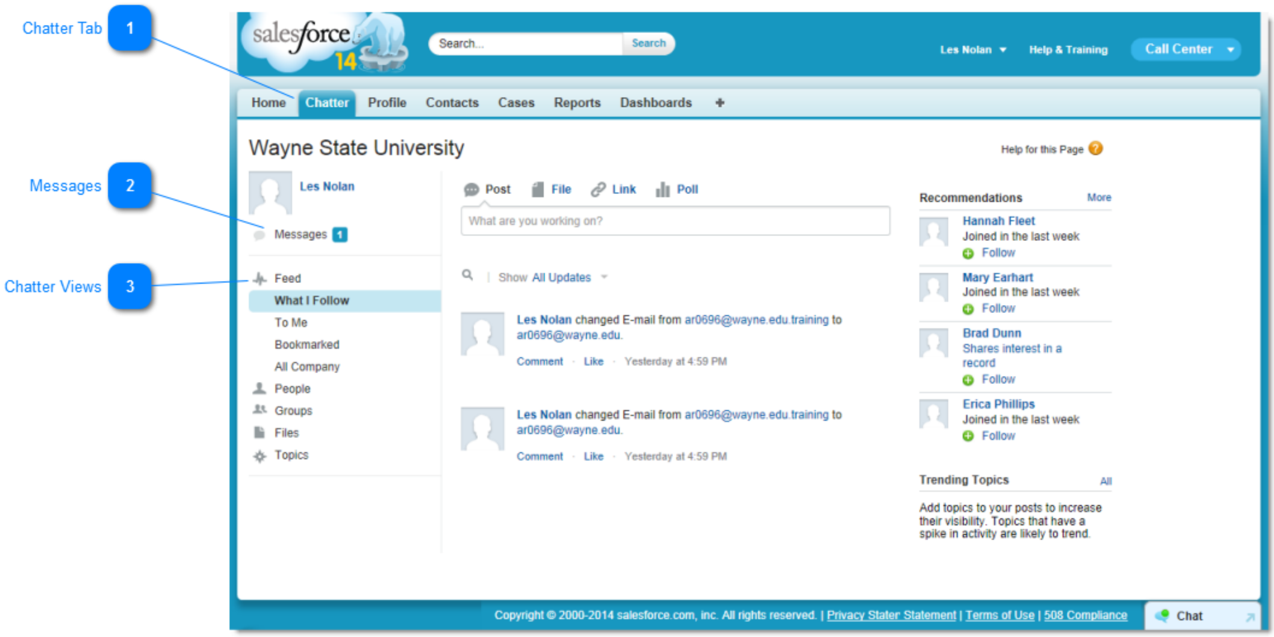
This section of the navigation panel displays a user's most recent activity with the CRM. From creating cases, to uploading documents (files), to communicating with other CRM users, the user can quickly revisit recent activity.

9 Custom Links



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

Chatter Tab



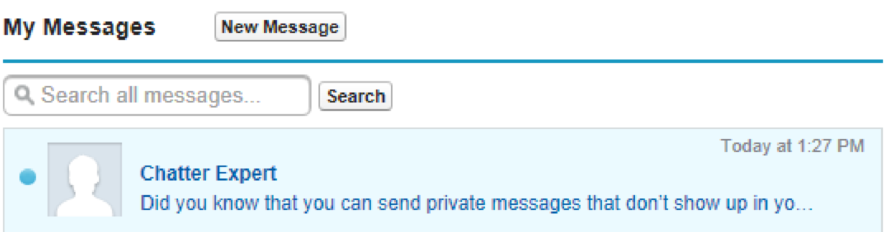
The Chatter Tab functions as the collaborative "home base" and gives you instant access to most of the collaboration features.

1 Chatter Tab

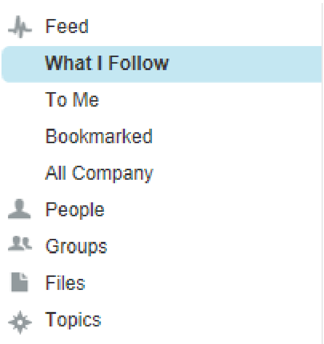
The **Chatter** tab is the collaboration home base and give the user instant access to most of the collaboration features in Chatter.

2 Messages

Clicking the **Messages** link will display your list of messages.



3 Chatter Views



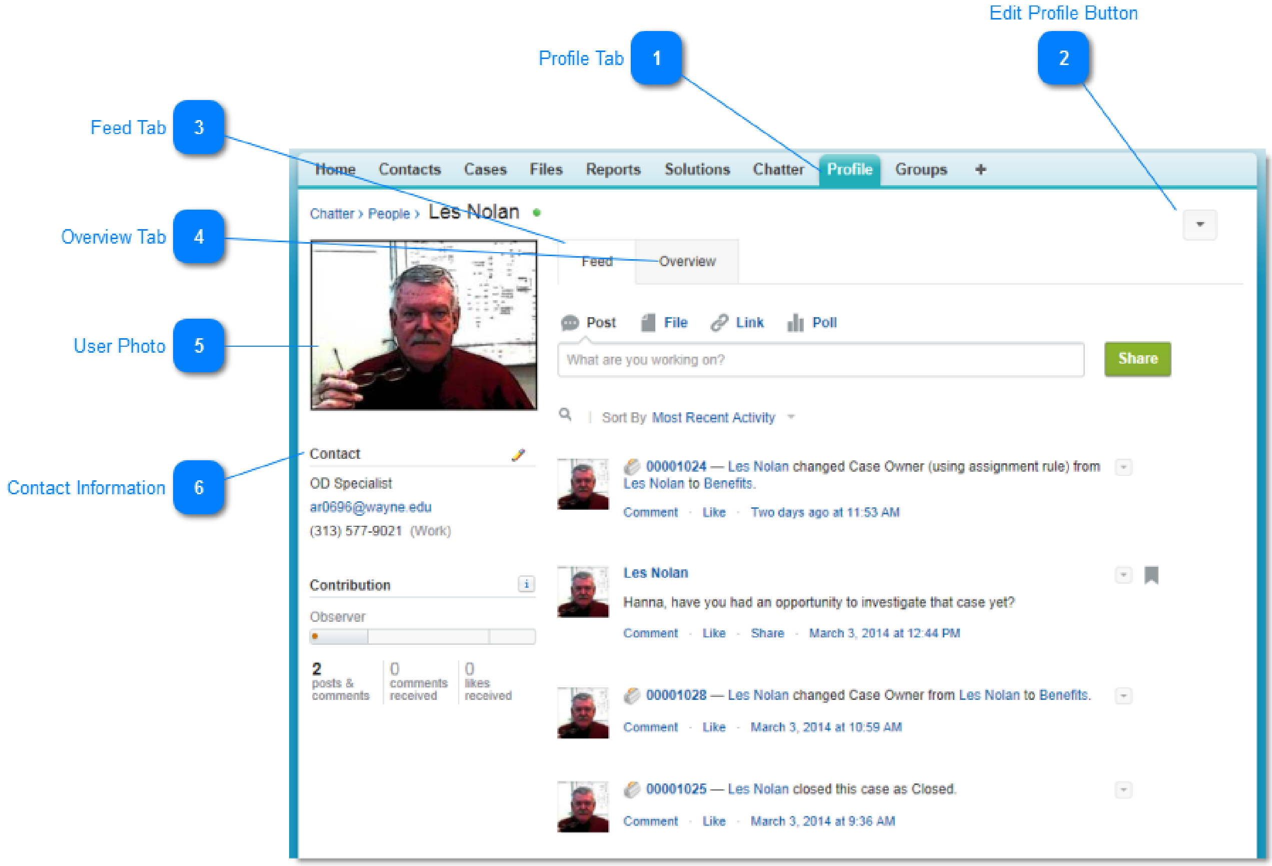
Clicking a **Chatter View** will change the content that is displayed in the Content Area.

Chatter Tab Uses

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



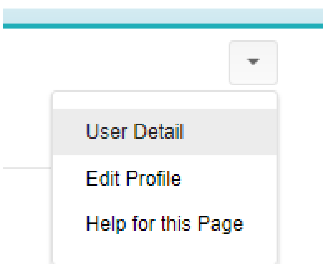
Customize your Profile with a photo and information about yourself so others can learn more about you.

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

Feed

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

4 Overview Tab

Overview

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.

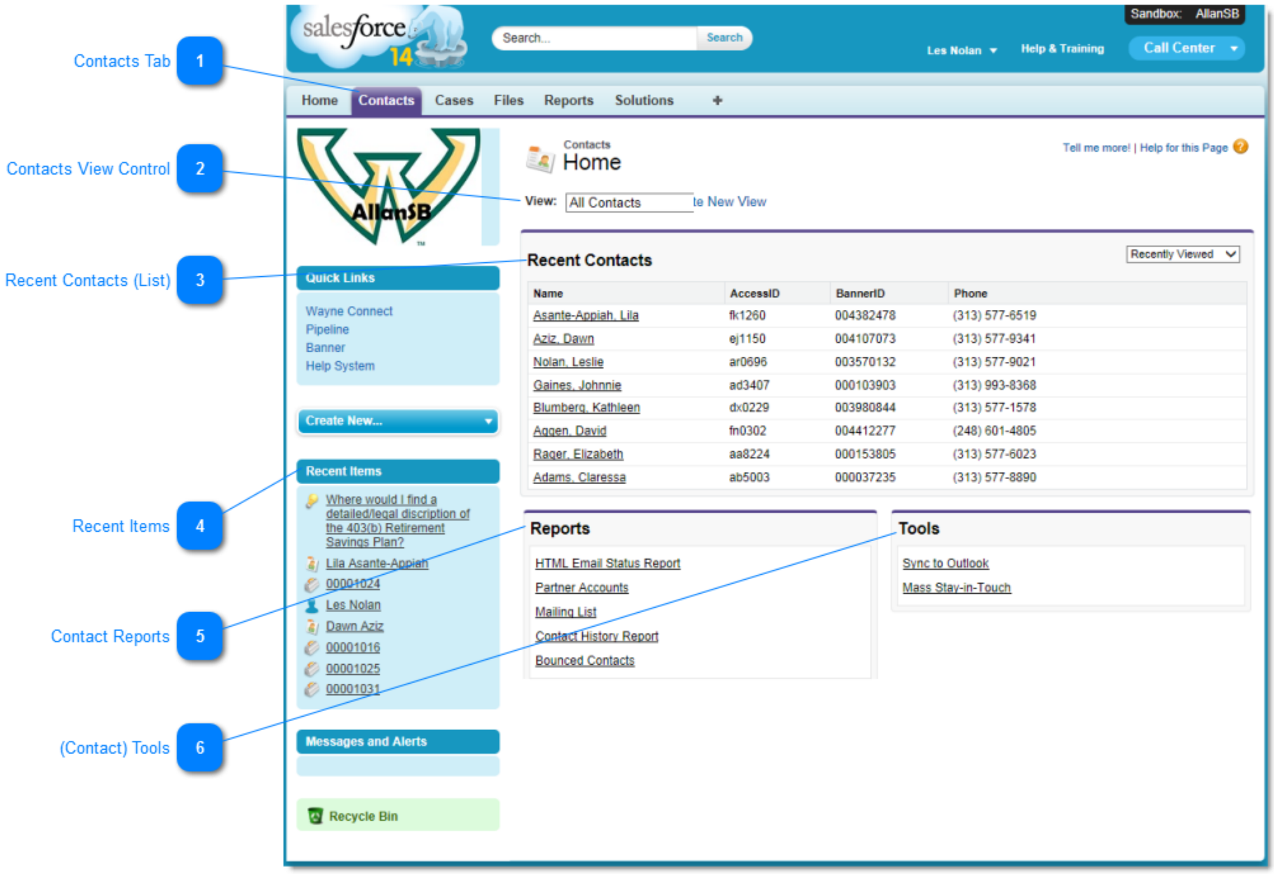
6 Contact Information

Contact

OD Specialist
ar0696@wayne.edu
(313) 577-9021 (Work)

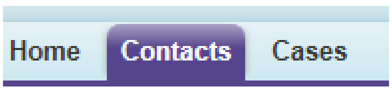
Click the pencil icon to edit your contact information.

Contacts Tab



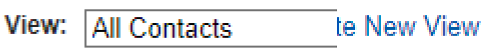
The Contacts tab provides you with the ability to view personal, employment, and job information about any contact that has been loaded into the CRM database.

1 Contacts Tab

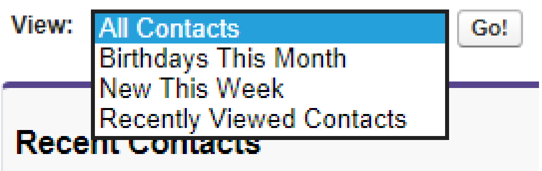


Click the **Contacts** tab to display contact information.

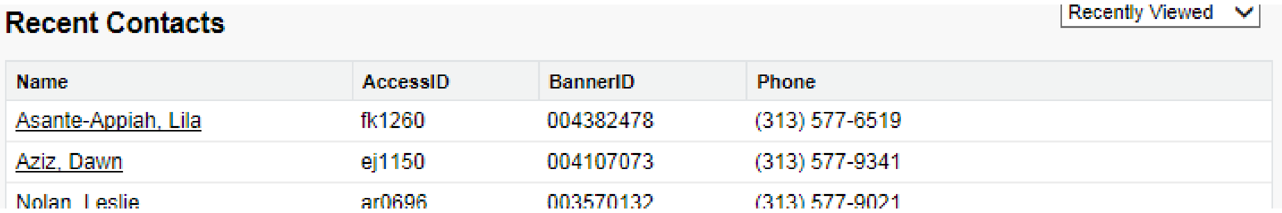
2 Contacts View Control



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)



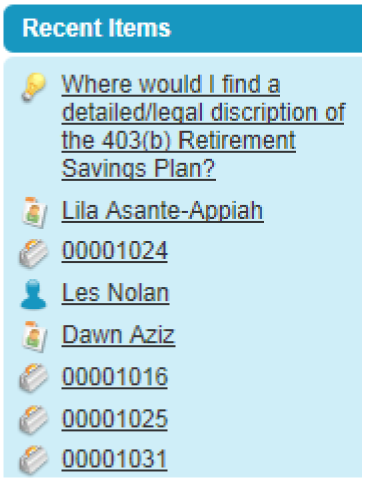
Recent Contacts

Recently Viewed

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 pu down list and clicking **GO**.

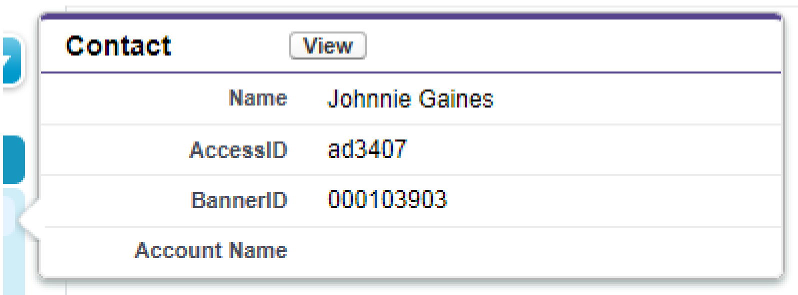
4 Recent Items



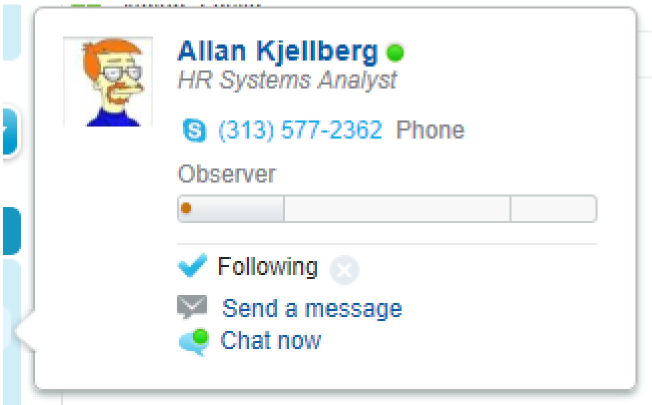
You can also display recently viewed contacts from the **Recent Items** section of the navigation panel. Names in this list are the result of either reviewing contact information of **Chats** that you make or by other users you are following. Numbers are recently viewed or created Case Numbers.

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

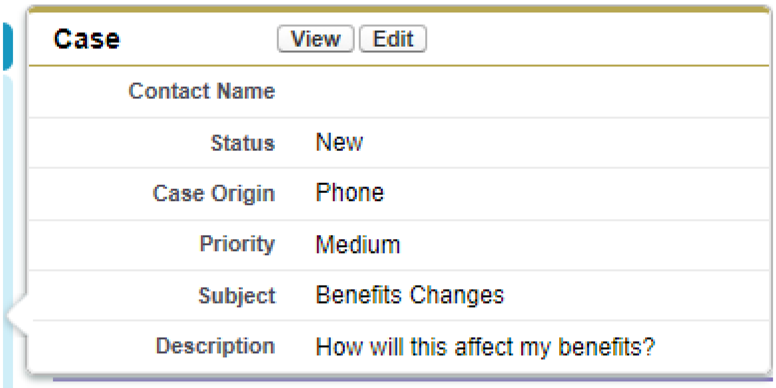
If it was a recently viewed contact, the pop-up will look like this:



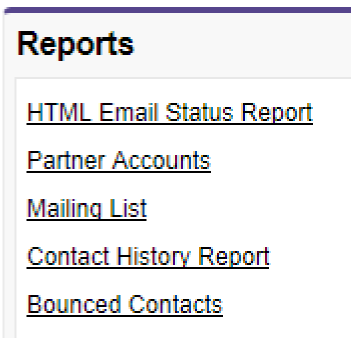
If it was a **Chat** response, the pop-up will look like this:



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

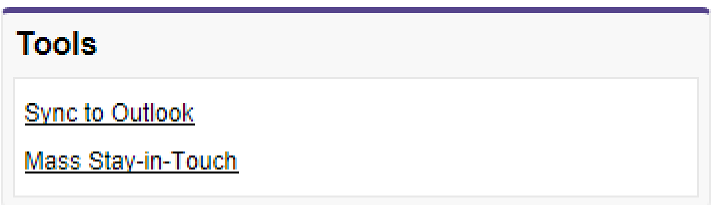


5 Contact Reports



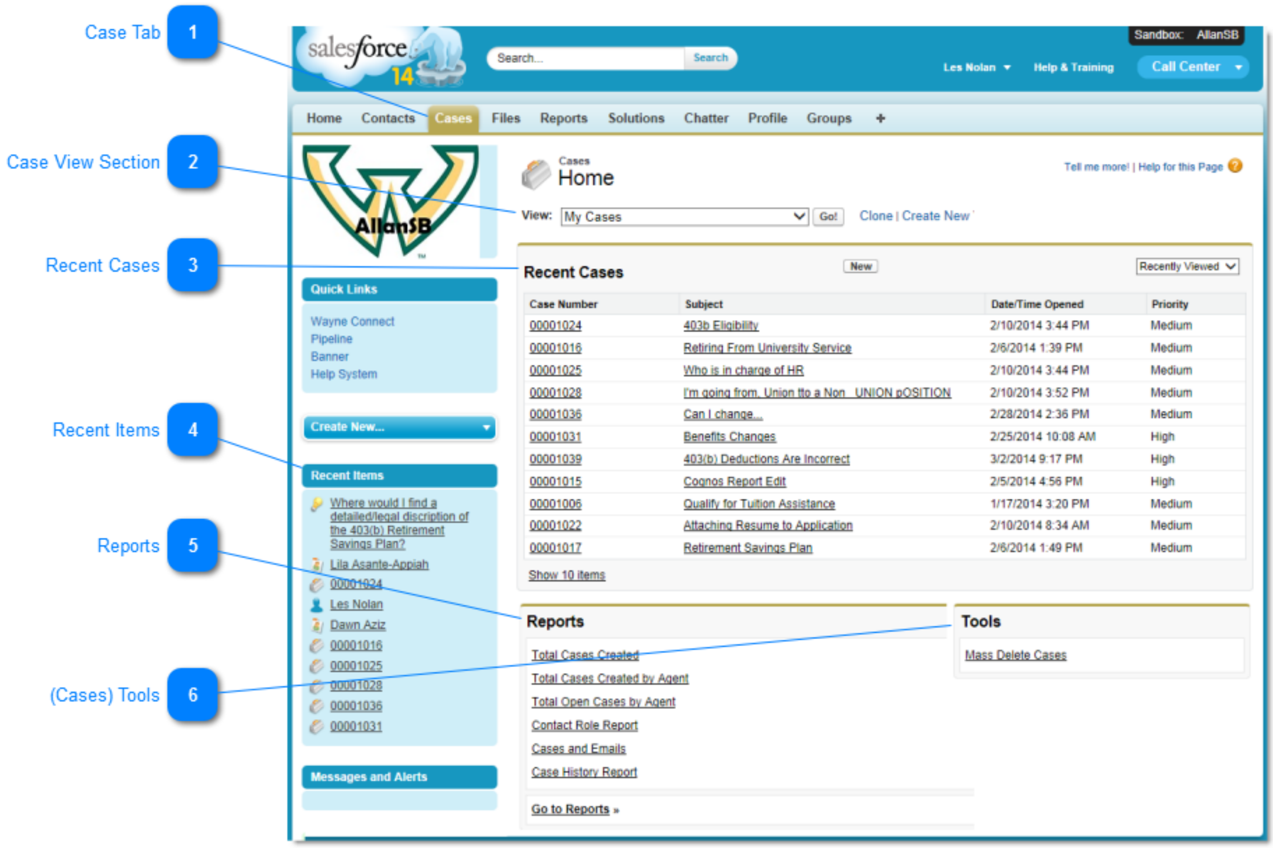
This section provides reports that are specifically associated with contacts.

6 (Contact) Tools



To be determined.

Cases Tab

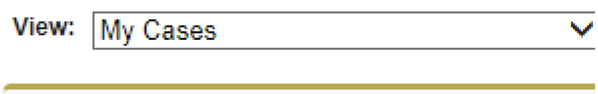


Creating a Case is the method for documenting an interaction with an Contact.

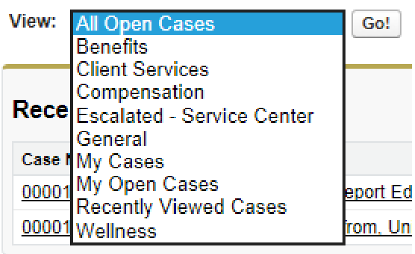
1 Case Tab

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

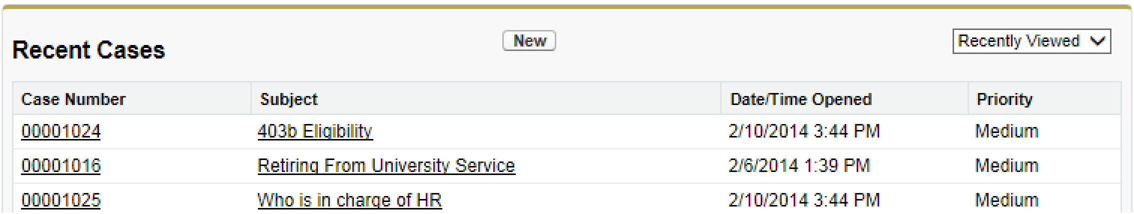
2 Case View Section



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.



Recent Cases

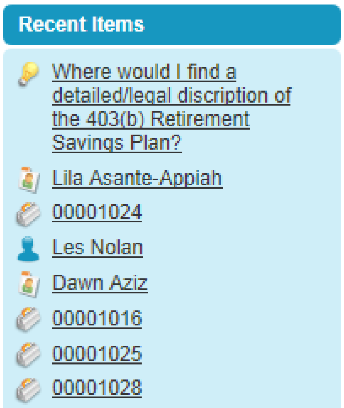

Recent Cases

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

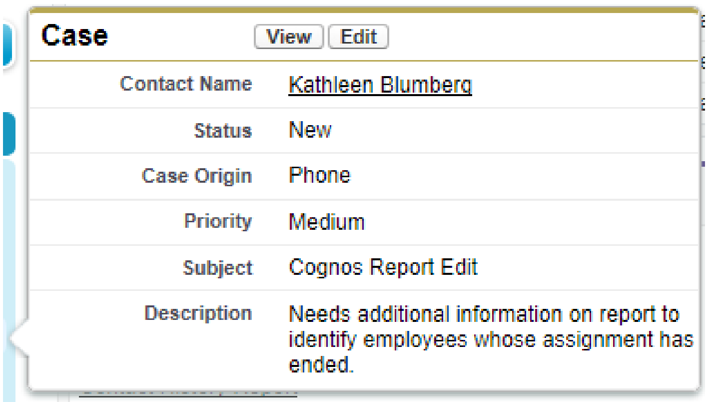
Recent Cases is display in this area as a result of clicking **Recently Viewed Cases** from the View pull-down list and clicking **GO**. The layout and information displayed will vary with the selection from the View pull-down list.

Recent Items



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:

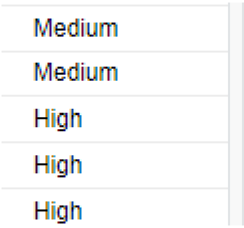


Note: Name values contained in the list are the result of Chat interactions.

5 Reports

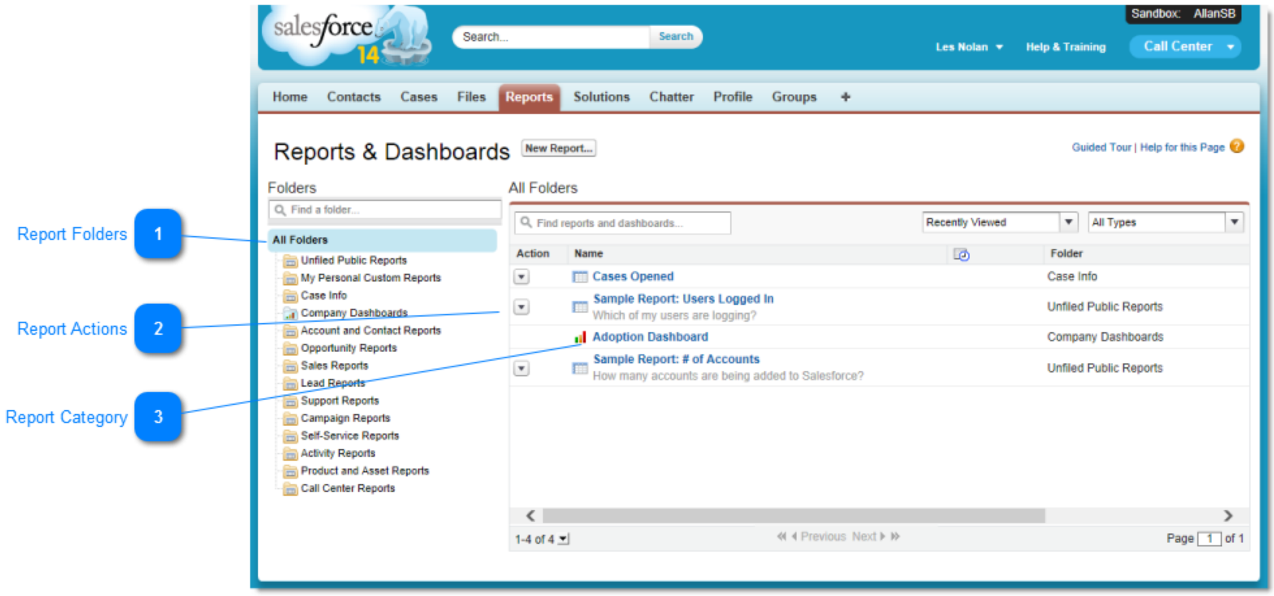
This section provides reports that are specifically associated with cases.

6 (Cases) Tools



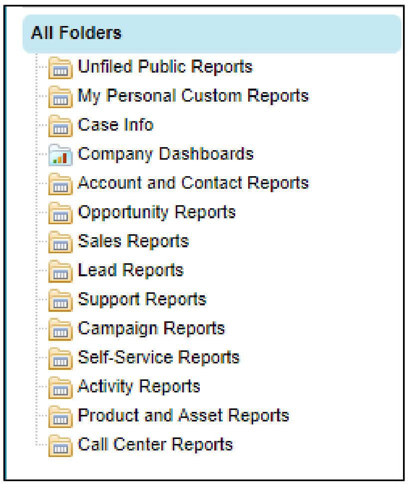
To be determined.

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.

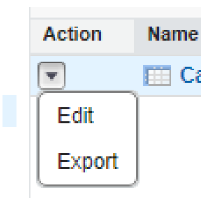
Report Folders



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.

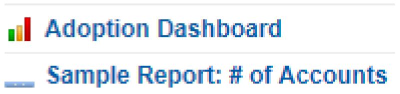
Report Actions

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

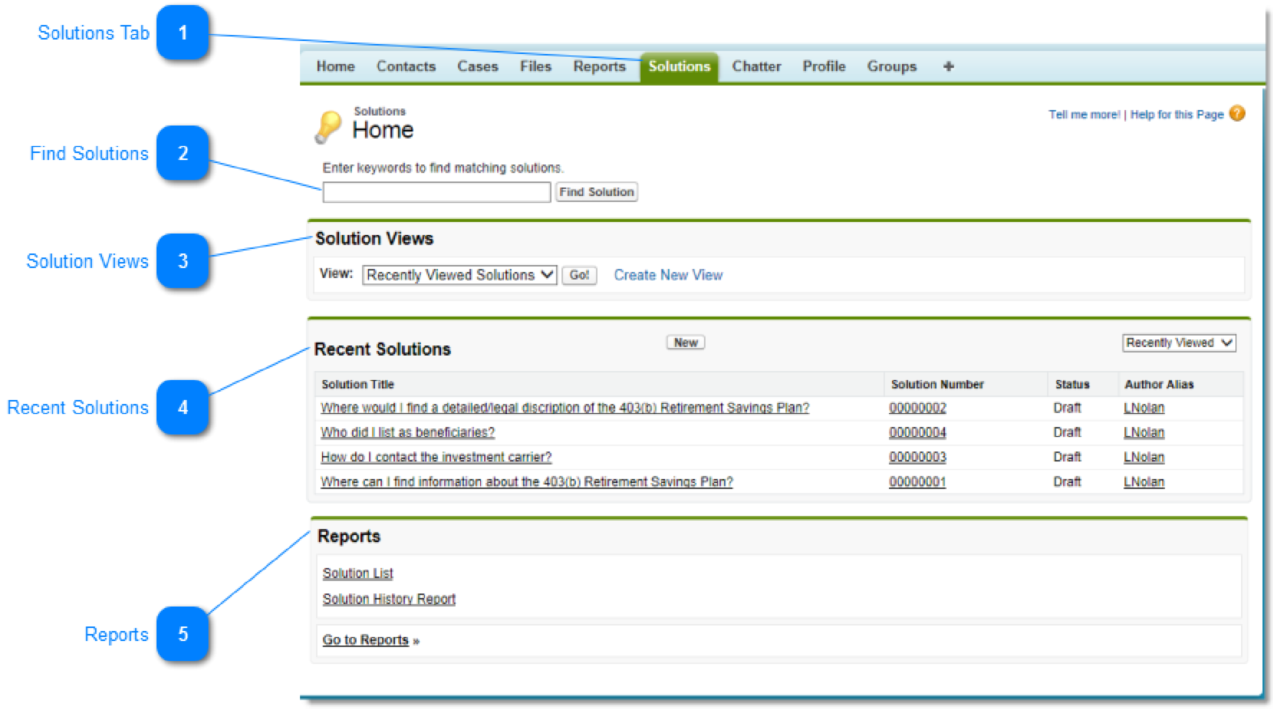


3

Report Category



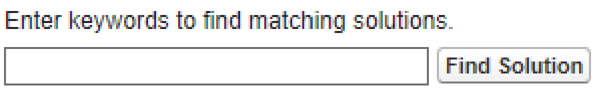
Solutions Tab (Optional)



1 Solutions Tab

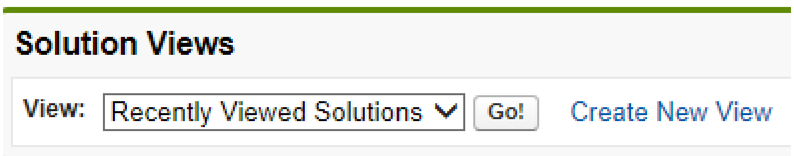
Clicking the **Solutions** tab displays the Solutions home page.

2 Find Solutions



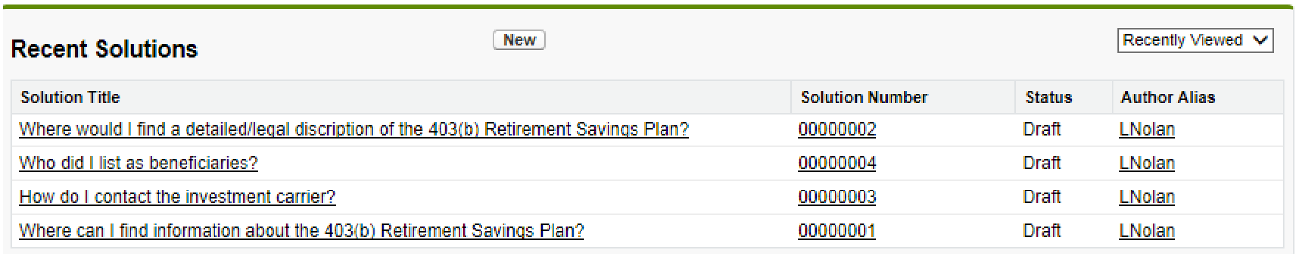
Enter key words to search for a solution.

3 Solution Views



Browse for solutions by category name and sub-category.

4 Recent Solutions

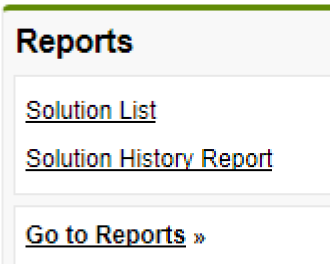


Recent Solutions New Recently Viewed

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

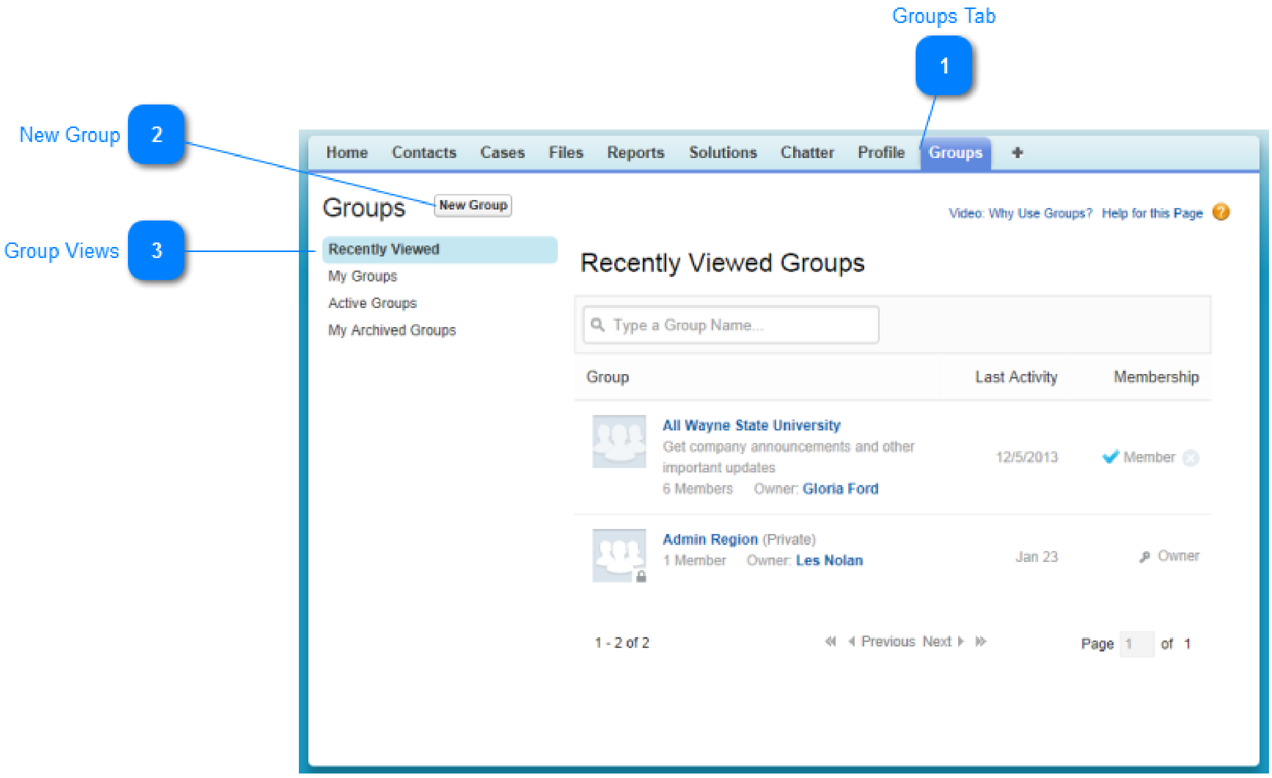
Click the solution title to display the solution.

5 Reports



Display a list of solutions.

Groups Tab (Optional)



The Groups Tab displays a list of the Chatter groups in the organization.

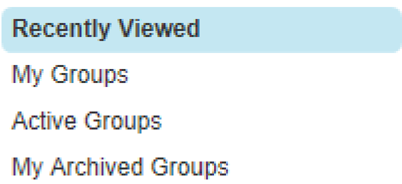
1 Groups Tab

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

2 New Group

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

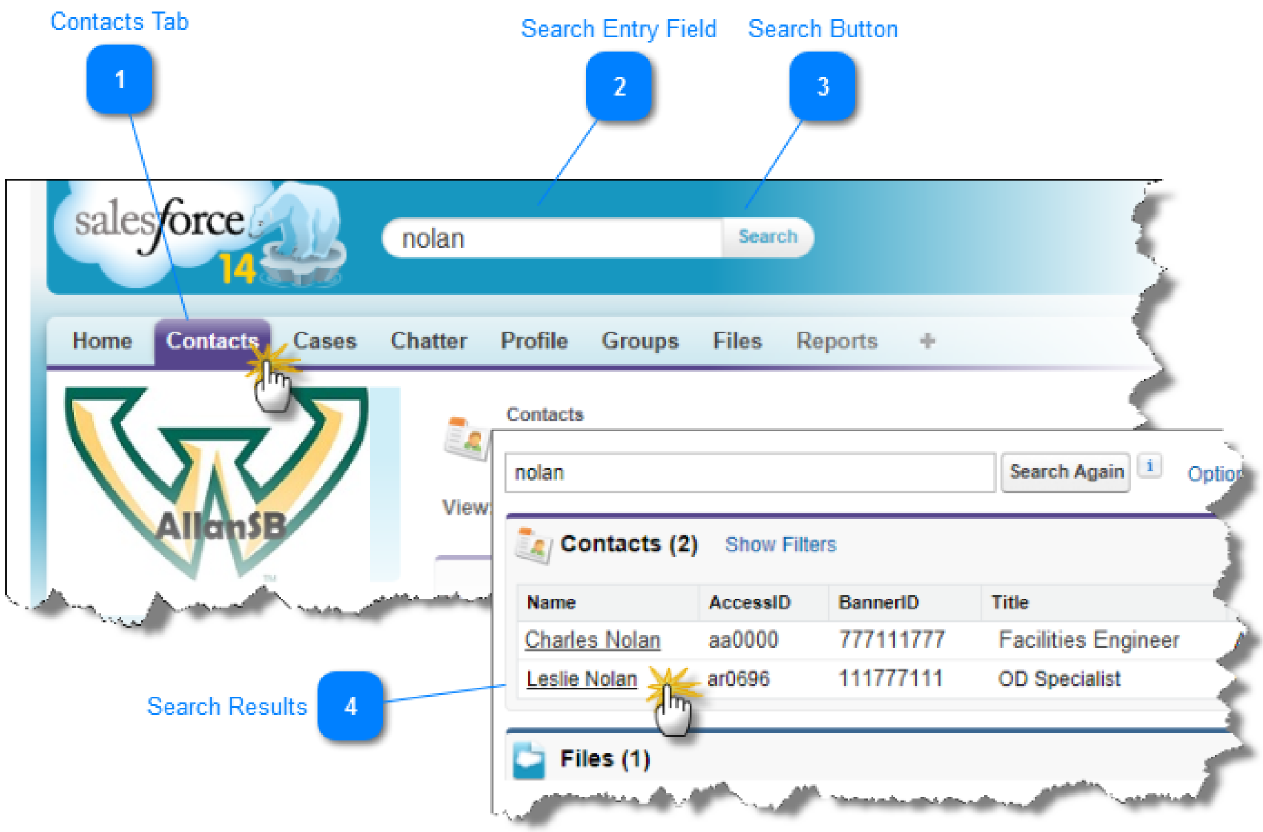
3 Group Views



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

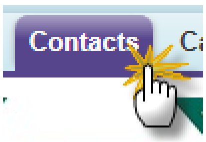
Locating an Employee's Contact Information

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.



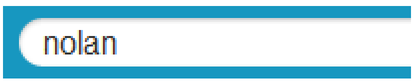
After obtaining the employee's WSU Access ID or his/her last name:

1. **Contacts Tab**



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

2. **Search Entry Field**



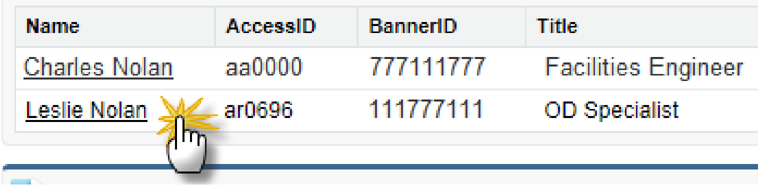
Enter the employees last name in the **Search** box.

3. **Search Button**

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

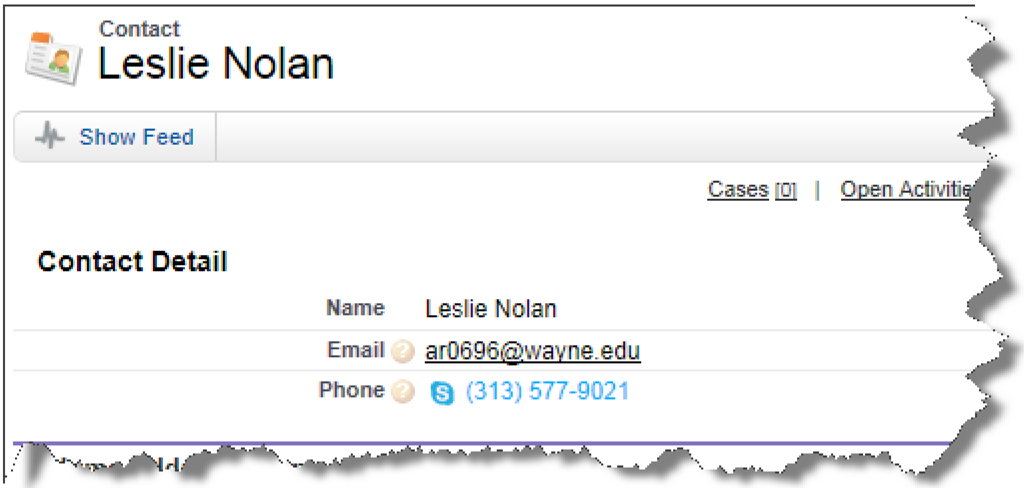
4

Search Results



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.



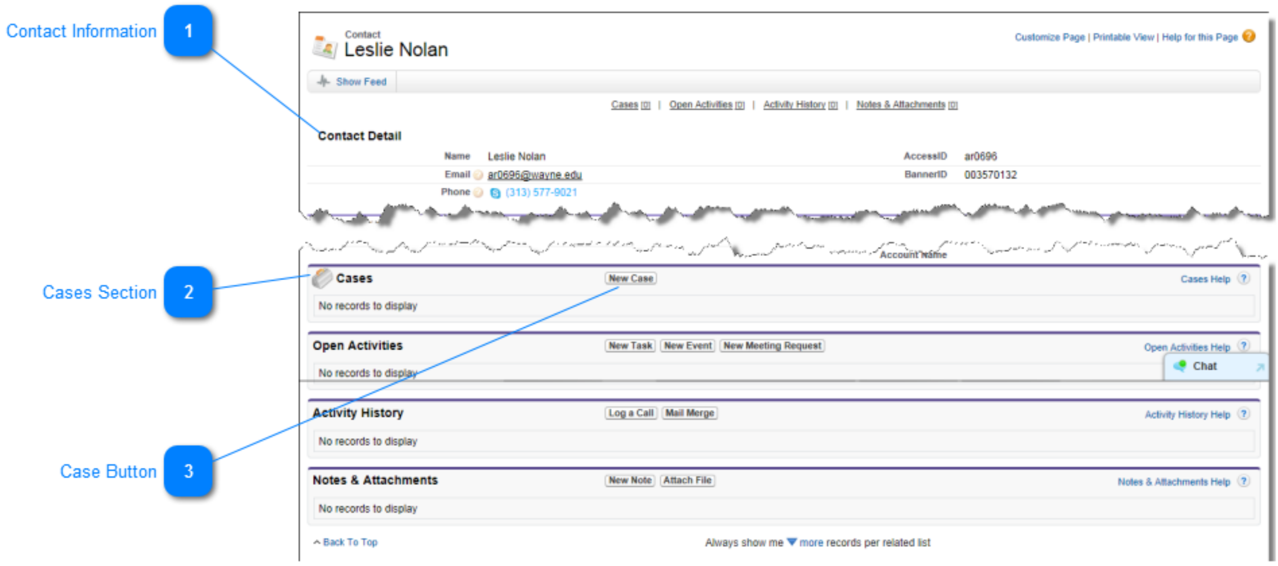
Working With Cases

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 resolution, assigned to a Response Queue or assigned to an individual user.

The case contains the following information:

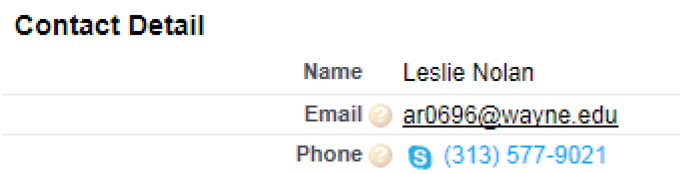
- The case number
- The case owner (person responsible for providing a solution/response to the contact.
- The name of the contact and the contact information
- Case status, a description of the issue, the date the case was created, and how the case came to the ERC.
- Case comments, case history, and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

Creating a Case for a WSU Employee



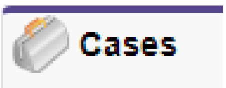
Creating a Case is the method for documenting the interaction with a contact.

1 Contact Information



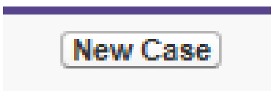
To create a "Case" for an employee issue, you must first locate the employee's contact information. Follow the step described in the section **Locate the Employee's Contact Information**.

2 Cases Section



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

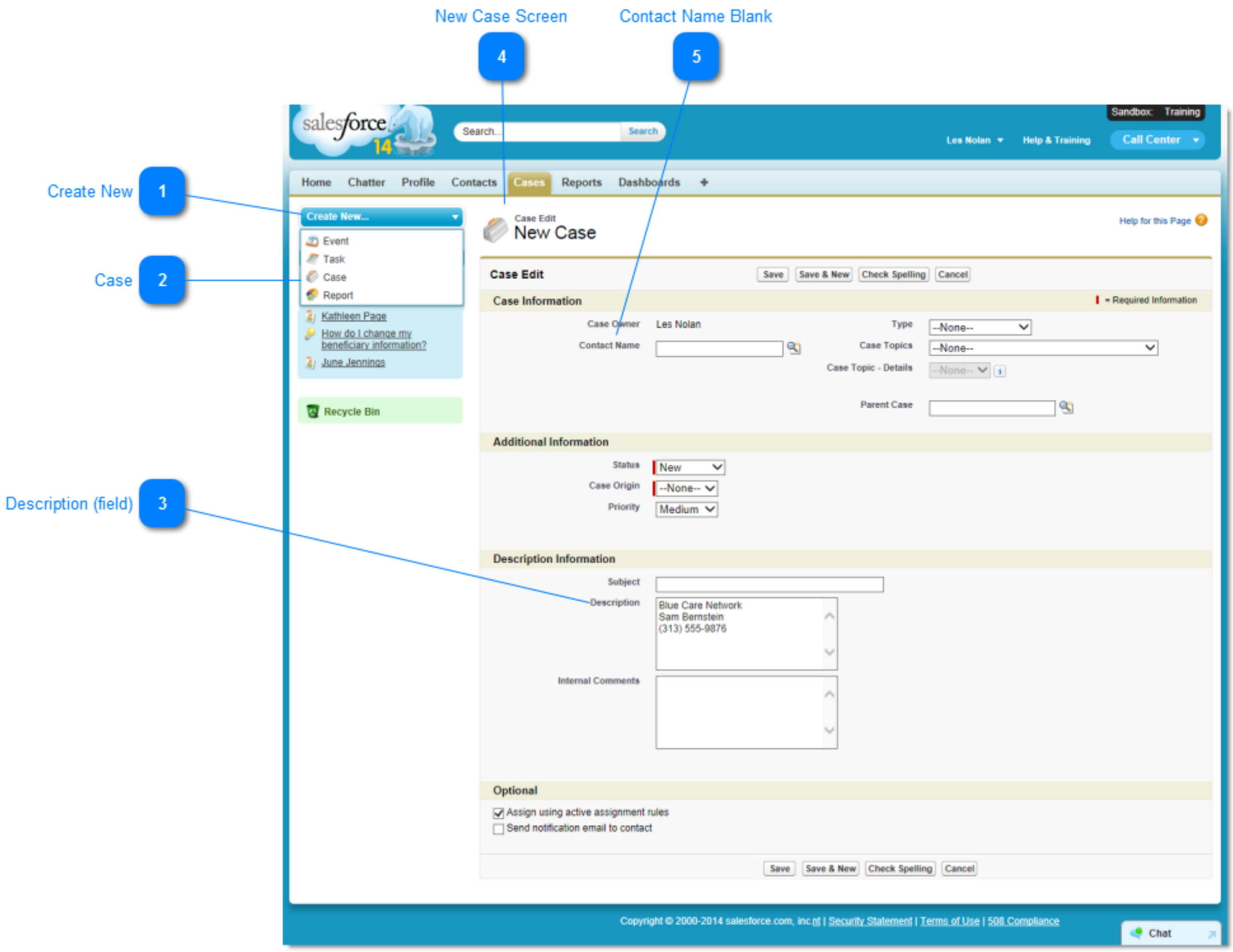
3 Case Button



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

See Completing a New Case for instructions on entering information into the New Case fields.

Creating a Case For a Non-Employee

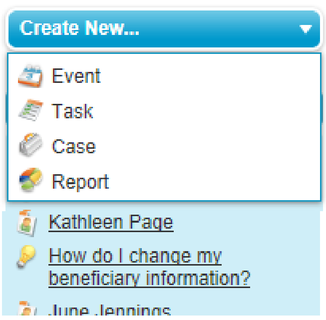


Creating a case for a non-employee differs in the way in which the case is created.

1 Create New

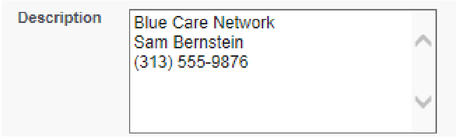
Click **Create New...** to activate the pull-down menu.

2 Case



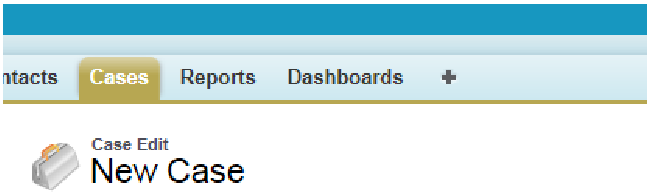
Click **Case** to create a new case for a non-employee inquiry.

3 Description (field)



Enter the contact information in the Description field. Enter the case description after the contact information.

4 New Case Screen



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

5 Contact Name Blank

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.

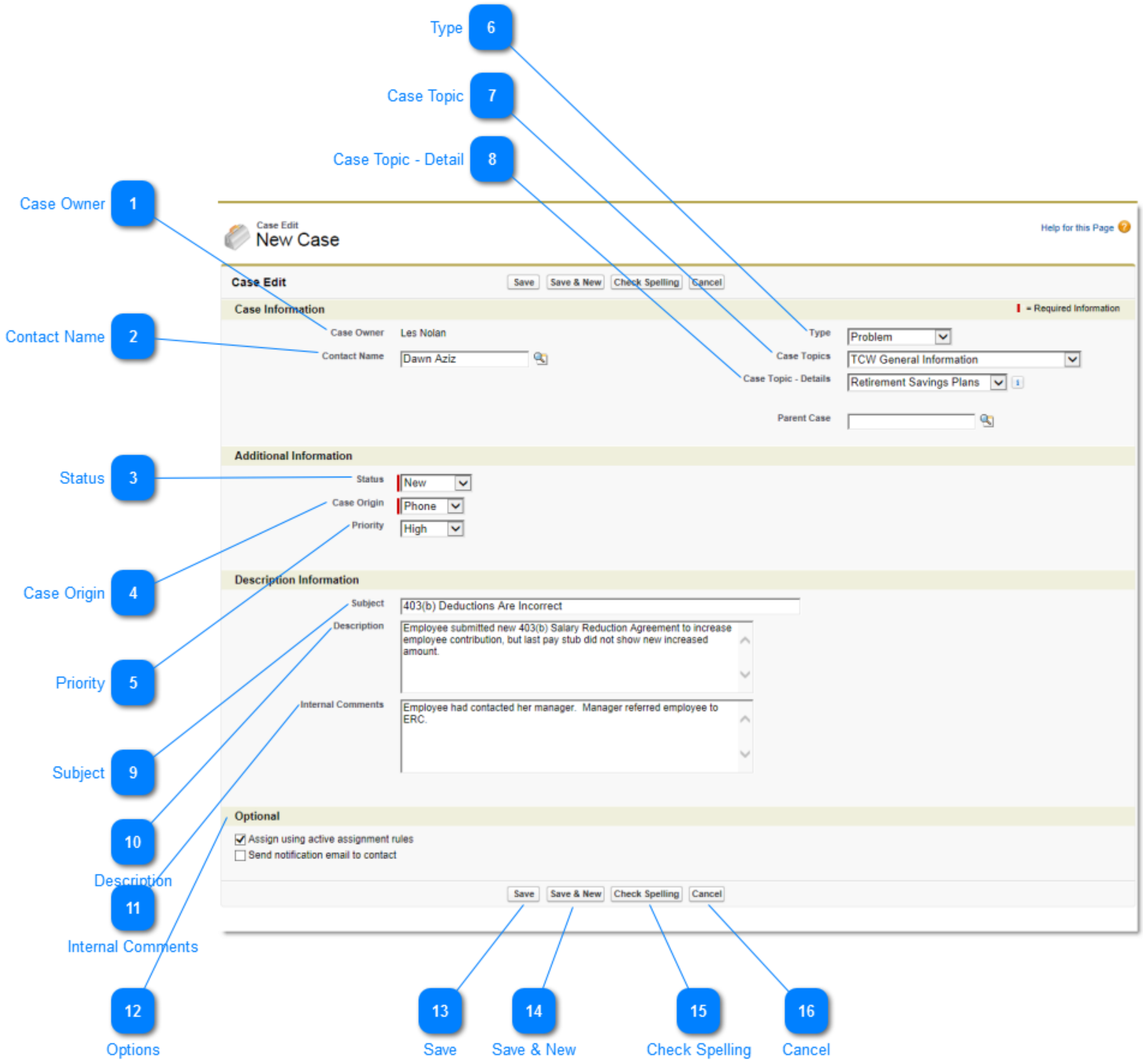
Leave the Contact Name blank!

The **Contact Name** for non-WSU contacts must be entered into the case description field.

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.

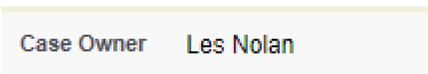
See [Completing a New Case]() for instructions on entering information into the New Case fields.

Completing a New Case



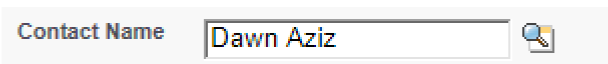
A well constructed case will help ensure a timely and accurate resolution of the case.

1 Case Owner



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



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

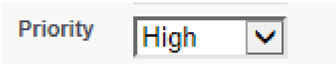
3 Status

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

4 Case Origin

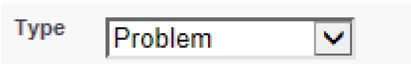
Case Origin indicates how the issues was brought to the ERC. Walk-in, Email, Mail (Post) and Web are additional options.

5 Priority



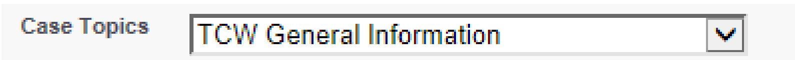
The default **Priority** is Medium. High and Low are also options.

6 Type



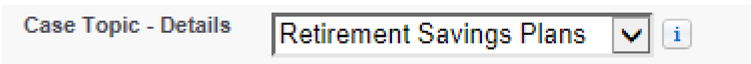
Type gives insight into the type of case being created. Question, Info Request and Service Request are also options.

7 Case Topic



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

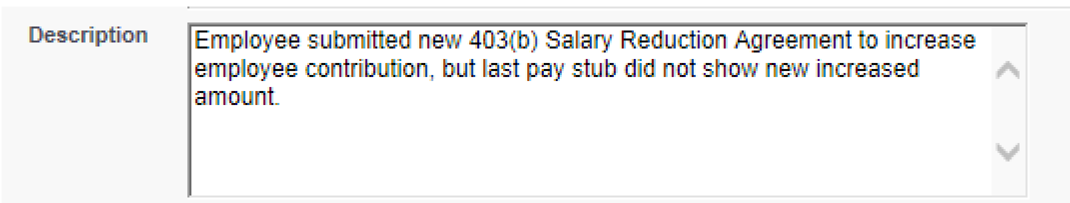


Case Topic - Detail provides a second-level classification of the case. In combination with the **Case Topic** the case can be routed to a specific queue where the case can be resolved by subject-matter experts.

9 Subject

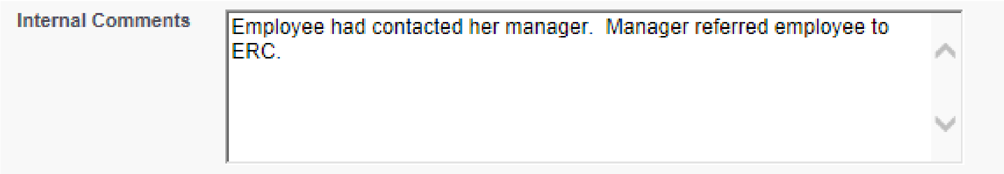
The **Subject** field allows the case originator to further refine the description of the case. This field also appears on the Cases screen with the case number.

10 Description



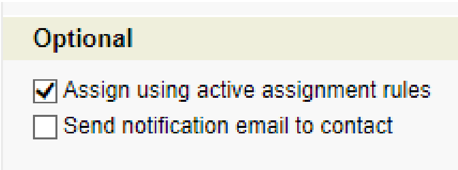
The **Description** field is where the details of the case are entered. A well developed description will provide the necessary detail for the case to be resolved. The description is included in an email to the contact if Send Notification Email to Contact is selected.

11 Internal Comments



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

12 Options



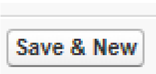
With the **Assign Using Active Assignment Rules** checkbox selected, the case will be routed to the queue identified by the **Case Topic** and **Case Topic - Detail**. If the originator of the case (current Case Owner) chooses to retain control of the case, they can do so by unchecking the checkbox.

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

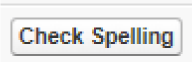
Clicking the **Save** button saves the case and have the system assign a case number to the case.

14 Save & New



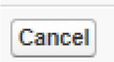
Clicking **Save & New** saves the case (system assigns case number) and creates a new case using the same contact information. Use this option if the contact has a second issue that is related to the first case or has a second unrelated issue.

15 Check Spelling



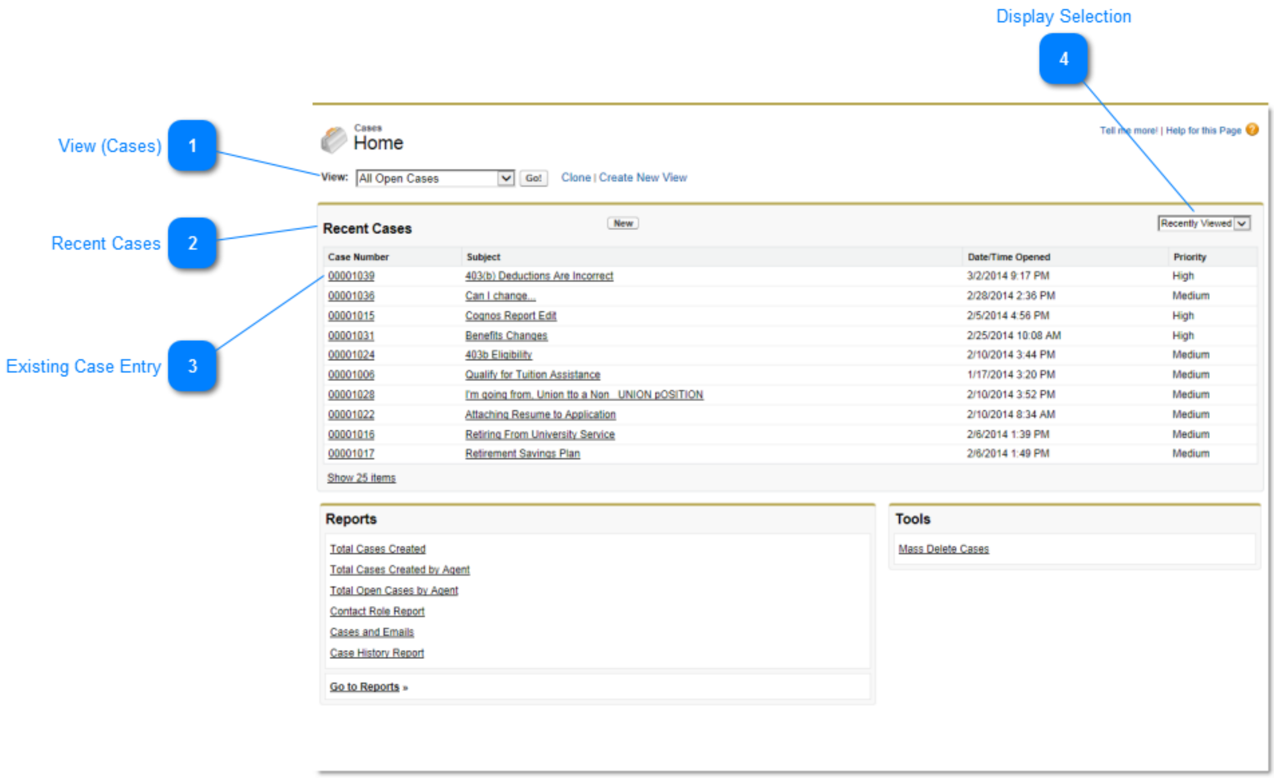
Unlike many word processors, Salesforce does not do simultaneous spell checking. If you want to spellcheck your case, you must click the **Check Spelling** button.

16 Cancel



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

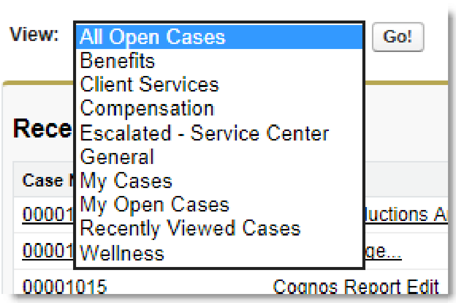
Open an Existing Case



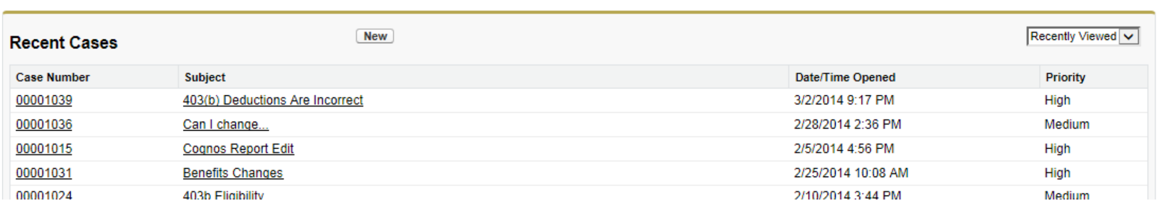
Click the Cases Tab to display the list of cases.

1 View (Cases)

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:

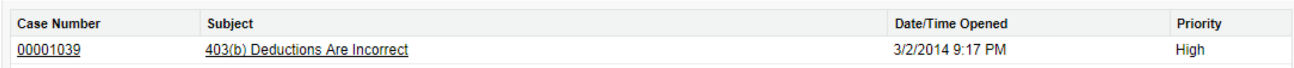


2 Recent Cases



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

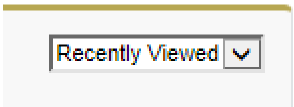
Existing Case Entry



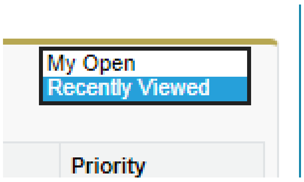
Case Number	Subject	Date/Time Opened	Priority
00001039	403(b) Deductions Are Incorrect	3/2/2014 9:17 PM	High

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

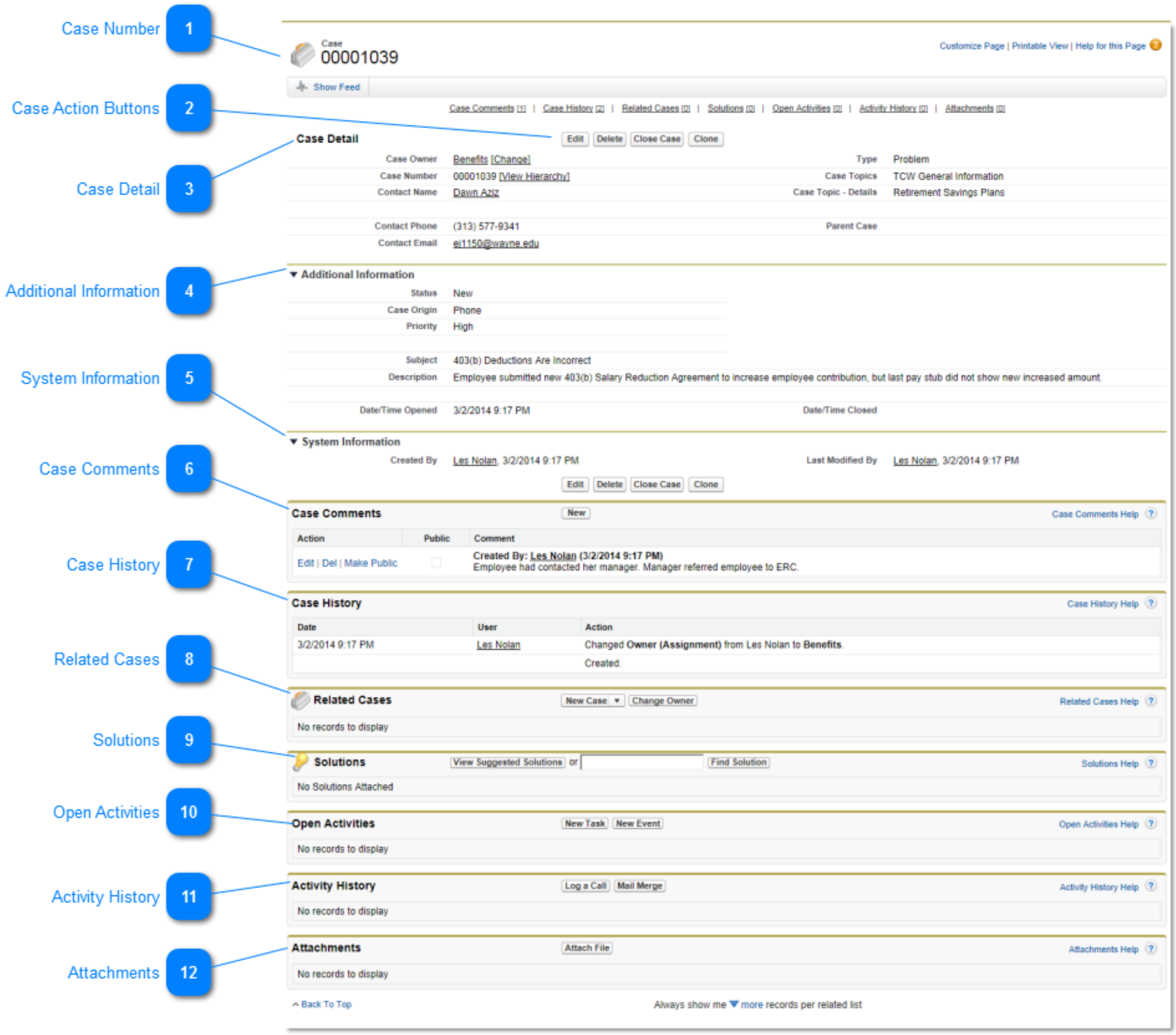
Display Selection



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.

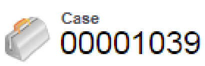


Viewing an Existing Case



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

1 Case Number



2 Case Action Buttons

These button 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

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 and 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.

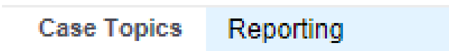
Note: The email address for a Non-WSU employee who initiates a contact will be in the **Description** field of the displayed case.

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

Example:

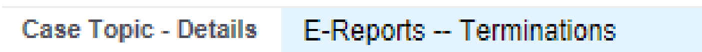
Case Topics: Case Topic classifies the type of contact into general categories.

Example: Employee Benefits



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

Example: Retirementy 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

▼ **Additional Information**

Status	New
Case Origin	Phone
Priority	High

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

▼ **System Information**

Created By	Les Nolan, 3/2/2014 9:17 PM

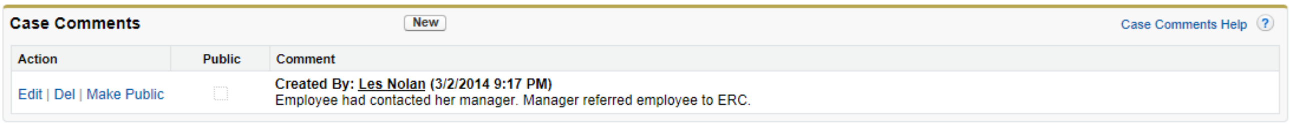
A right-pointing arrow next to a section title indicates that section is collapsed. To expand the section and display its content, click the right-pointing arrow. To collapse a section to hide its contents, click the down-pointing arrow.

▼ **System Information**

Created By	Deborah Foster, 2/5/2014 4:56 PM	Last Modified By	Les Nolan, 2/27/2014 4:07 PM

Edit | Delete | Close Case | Clone

6 Case Comments



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.

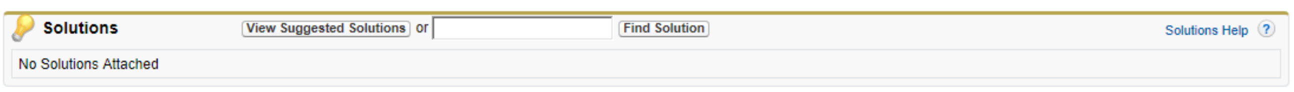
7 Case History

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

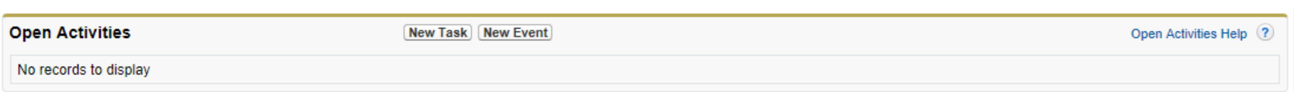
The Related Cases list displays all of the cases directly below a parent case in a case hierarchy. Cases can be associated with each other via the Parent Case lookup field on a case edit page. When a case is associated with a parent case it signifies a relationship between cases, such as a grouping of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

9 Solutions



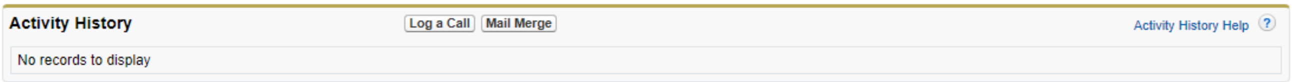
This section links to a list of Solutions. The search function searches all fields that exist on a solution.

10 Open Activities



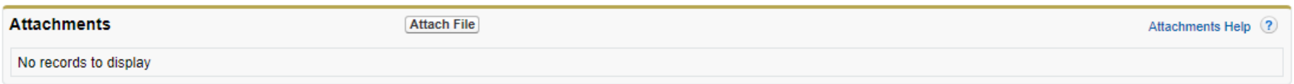
The Case History related list of a case detail page tracks the changes to the case. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the case, a new entry is added to the Case History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the case are not tracked in the case history

11 Activity History



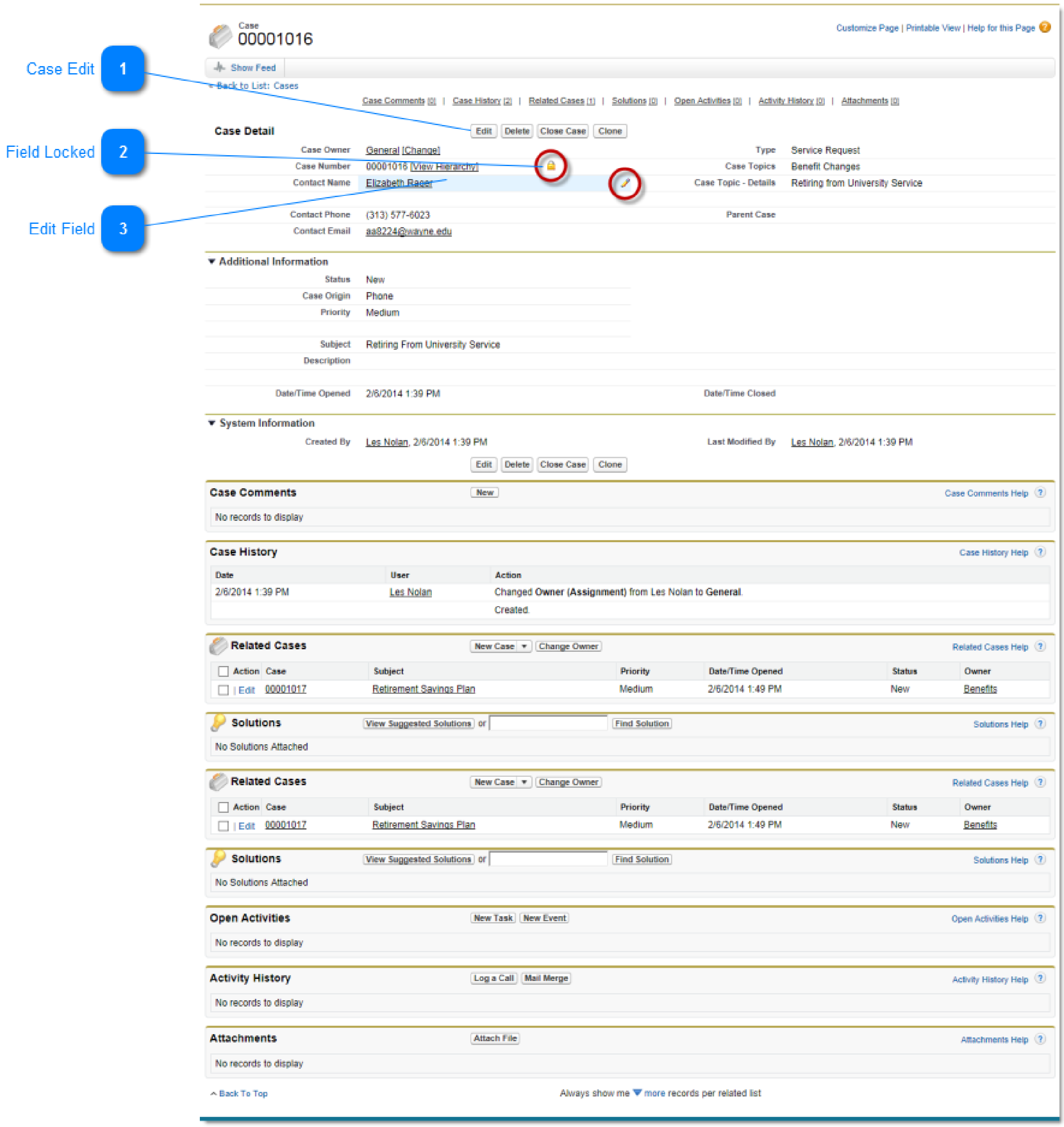
The Activity History related list of a record displays all completed tasks, logged phone calls, saved interaction logs, expired events, outbound email, mass email, email added from Microsoft Outlook®, and merged documents for the record and its associated records.

12 Attachments



You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records.

Editing an Existing Case



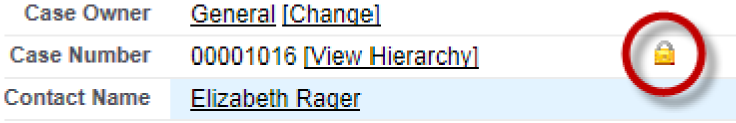
There are two ways to edit a case: case edit mode or edit field by field.

1 Case Edit

Edit

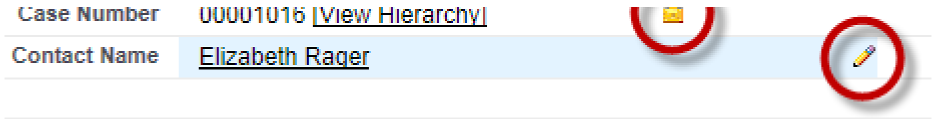
Clicking the Edit button will place the entire case into edit mode. All editable fields will be displayed.

2 Field Locked



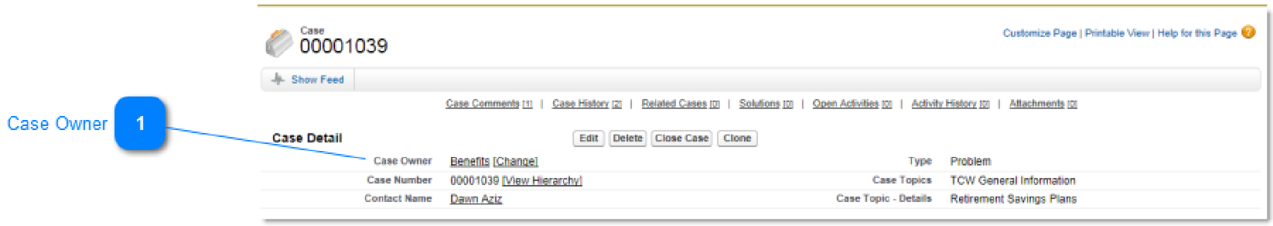
If a **Closed Lock** icon appears near a field when it has been selected, that field cannot be edited.

3 Edit Field



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.

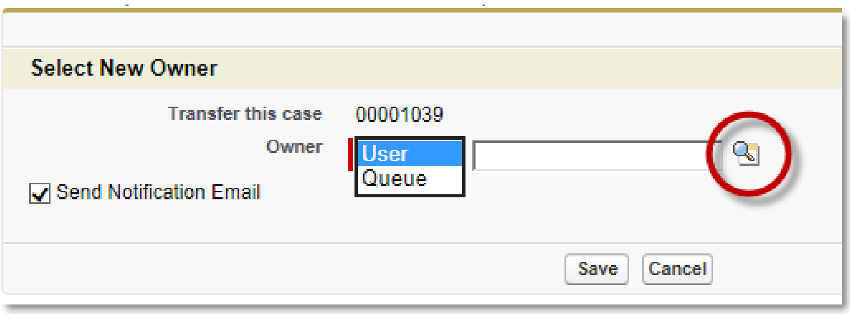
Reassigning a Case To a New Owner



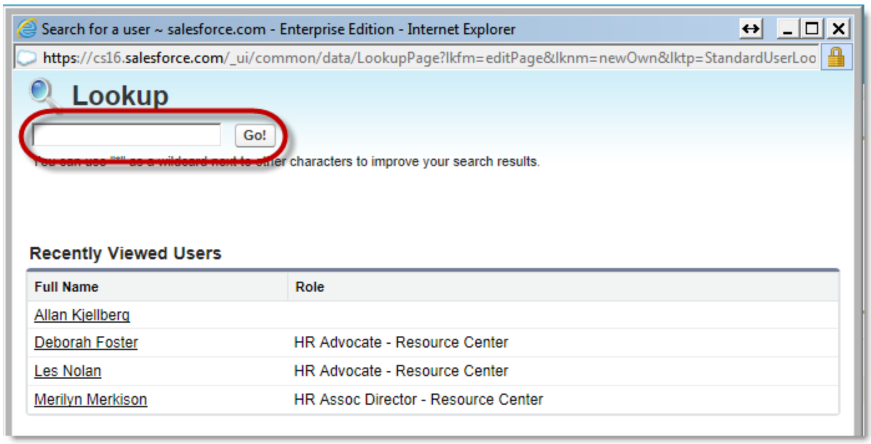
To re-assign a case to a new owner, first open the desired case.

1 Case Owner

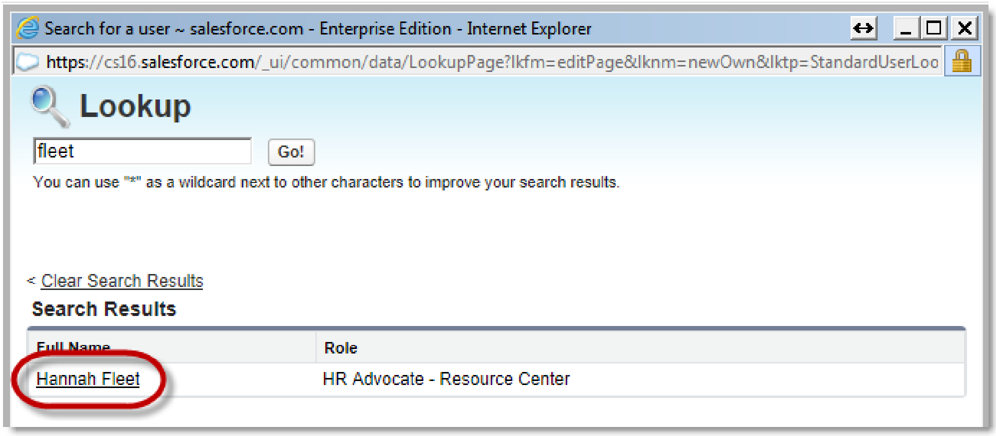
Click the **Change** link to the right of the current **Case Owner** (Benefits). The Change Case Owner screen displays. There are two options for reassigning the case. The case can be reassigned to a specific **User** or to a **Case Queue**. If reassigning to another user, click the **Lookup** button to the right of the lookup field.



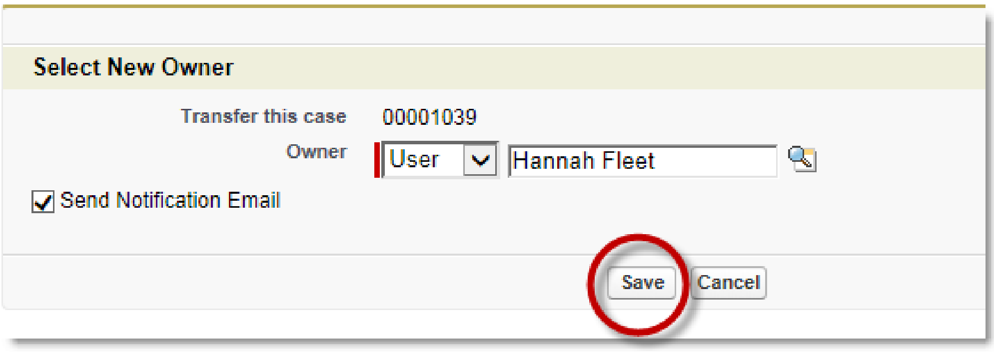
A **Lookup** screen will display. Enter the new owners last name in the Lookup field and click the **Go!** button.



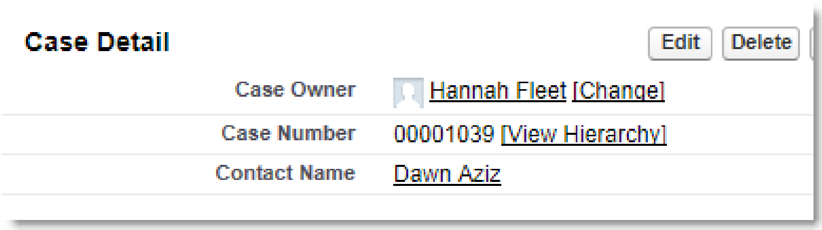
Click the name of the user you want to assign as the new Case Owner.



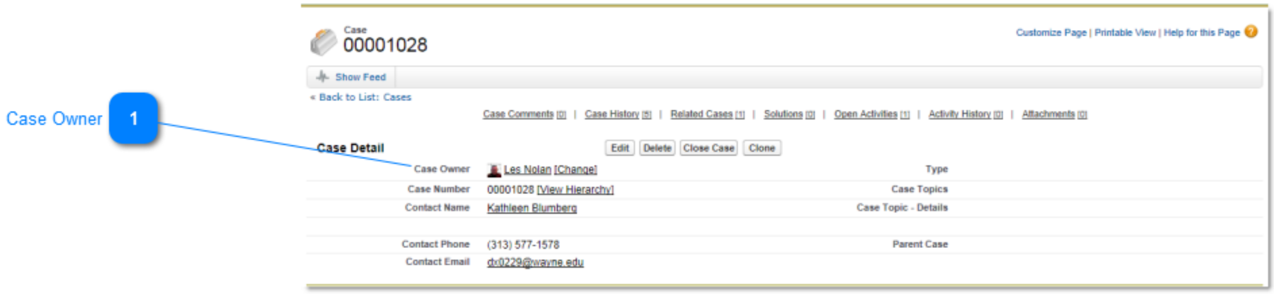
Click **Save** to complete the reassignment.



The case has been reassigned to a new Case Owner.



Routing a Case To a New Response Queue

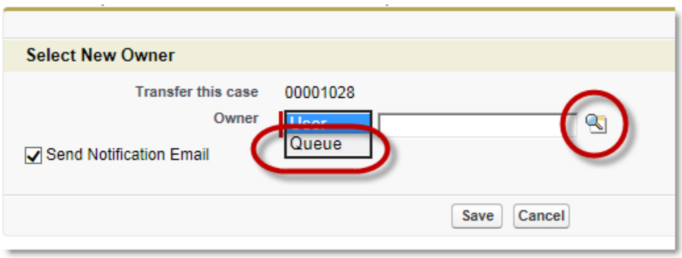


To reassign a case to a **Response Queue**, first open the desired case.

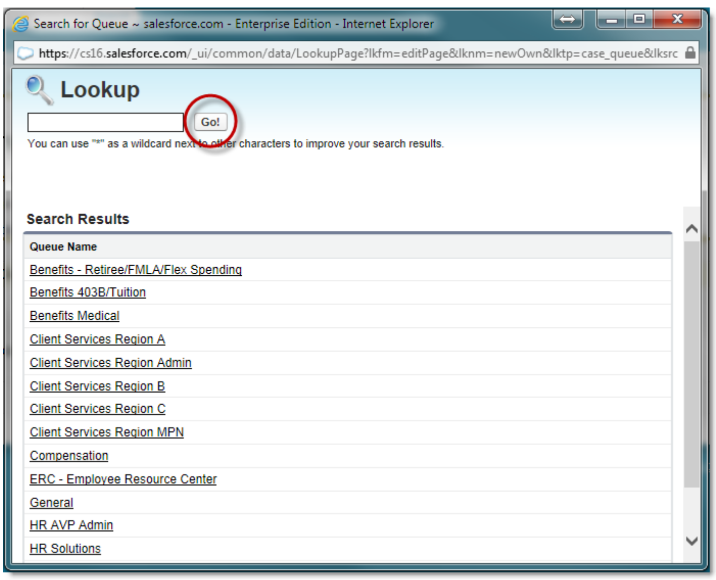
1 Case Owner

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

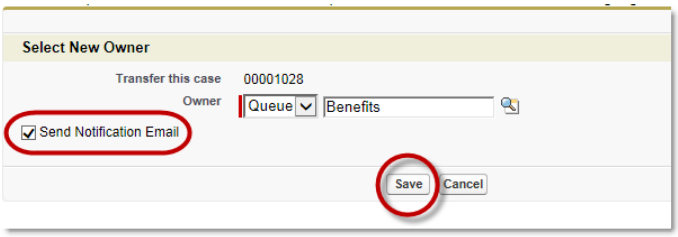
Click the down arrow for the **Owner** field and select **Queue** from the drop-down list, then click the **Owner Lookup** button.



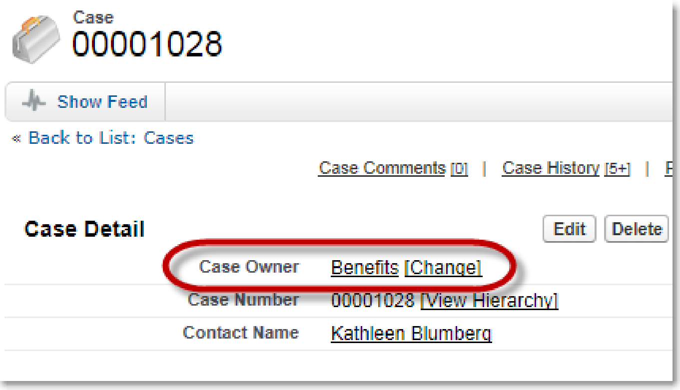
When the **Lookup** screen displays, select the appropriate **Queue** from the **Search Results** list and click the **Go!** button.



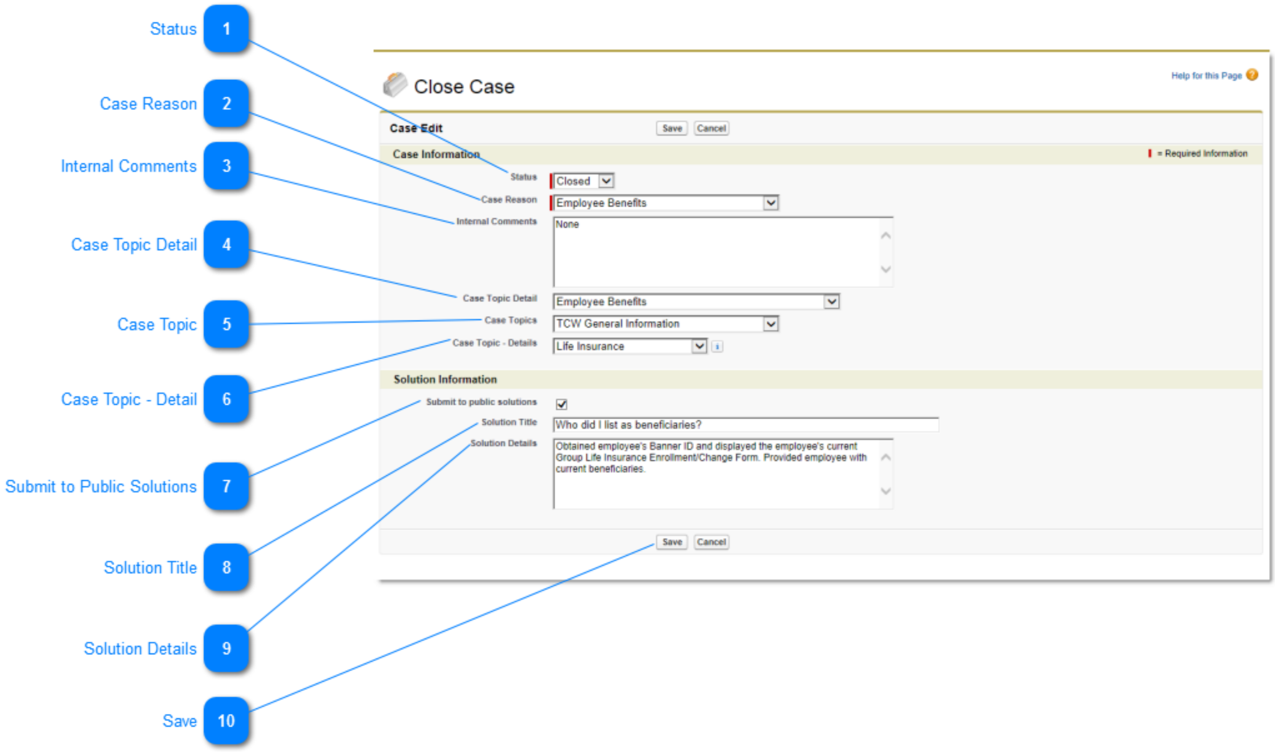
Verify the **Send Notification Email** checkbox is selected (Queue owners will receive notification of new case in queue) and click **Save**.



Case Owner has been updated.

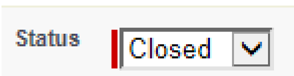


Closing a Solved Case



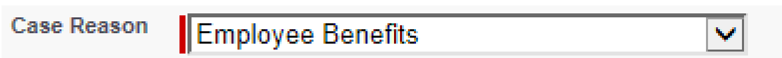
To close a case, open the desired case and click either **Close Case** button. A Close Case edit screen will display.

1 Status



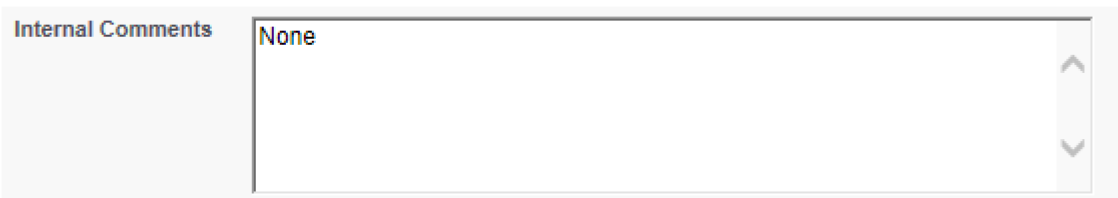
Change **Status** to **Closed**.

2 Case Reason



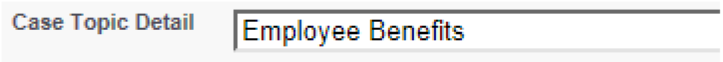
Select a **Case Reason** from the drop-down list.

3 Internal Comments



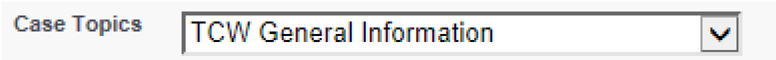
Enter any additional closing **Internal Comments** (contact does not see these comments). Enter **None** if there are no additional closing comments.

4 Case Topic Detail



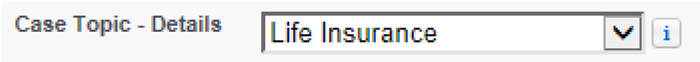
Select the appropriate **Case Topic Detail** from the drop-down list.

5 Case Topic



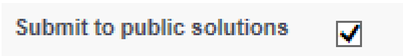
Select the appropriate **Case Topic** from the pull-down list.

6 Case Topic - Detail



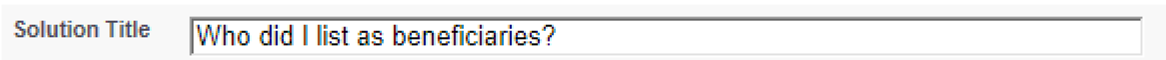
Select the appropriate **Case Topic - Detail** from the drop-down list.

7 Submit to Public Solutions



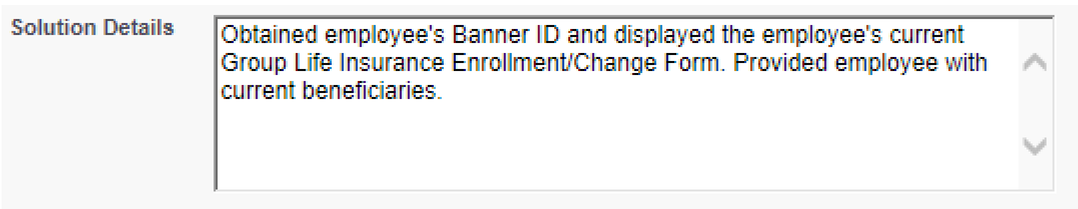
By leaving the **Submit to Public Solutions** checkbox checked, the **Solution Title** and **Solution Details** will be will create a **Solution** and post it in the Solutions library.

8 Solution Title



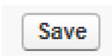
Enter a **Solution Title**. If this solution will be added to the library of solution, please word the title as a **question**.

9 Solution Details



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.

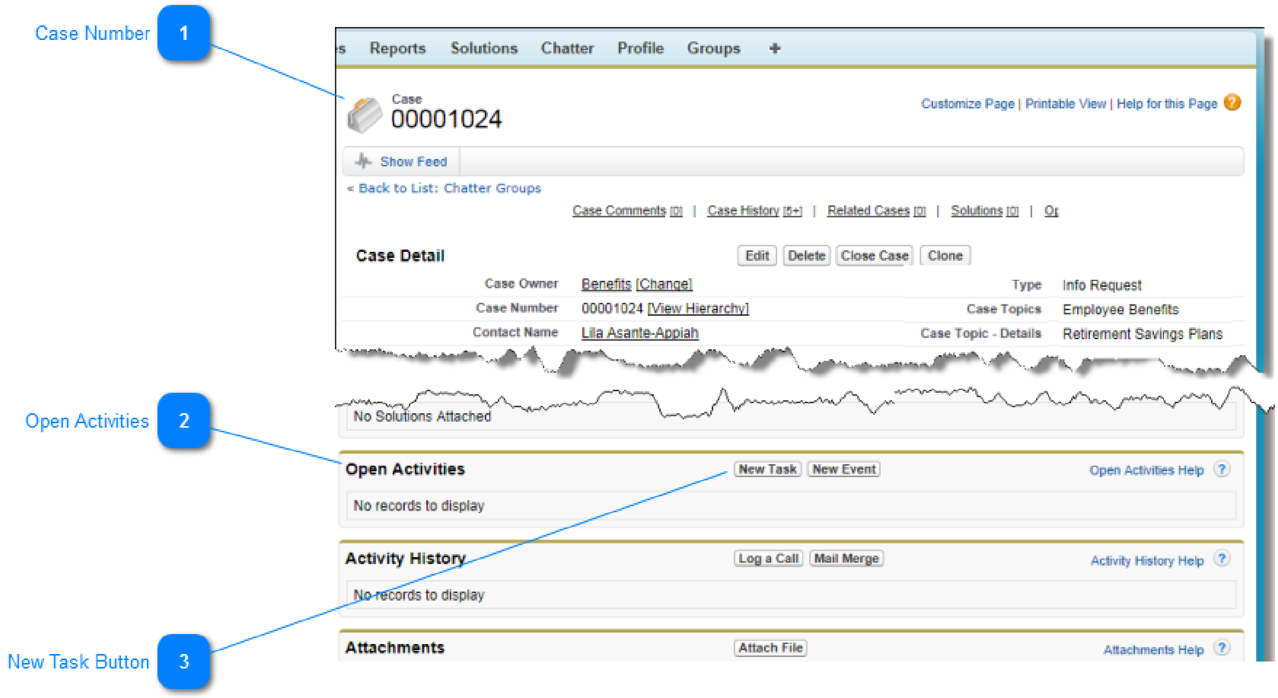
A New Tasks can be created from:

- 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



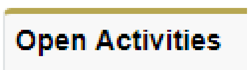
In the process of resolving an issue, you may find that you must take an action that is outside the ordinary steps for resolving this type of issue. You may need to make a phone call to a department outside of Human Resources or to a vendor. You may have to meet with someone face-to-face to get an answer.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

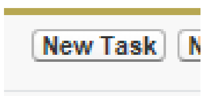
Open the desired case from the Case tab, Recent Items, of from the Contacts record.

2 Open Activities



Scroll to the **Open Activities** section.

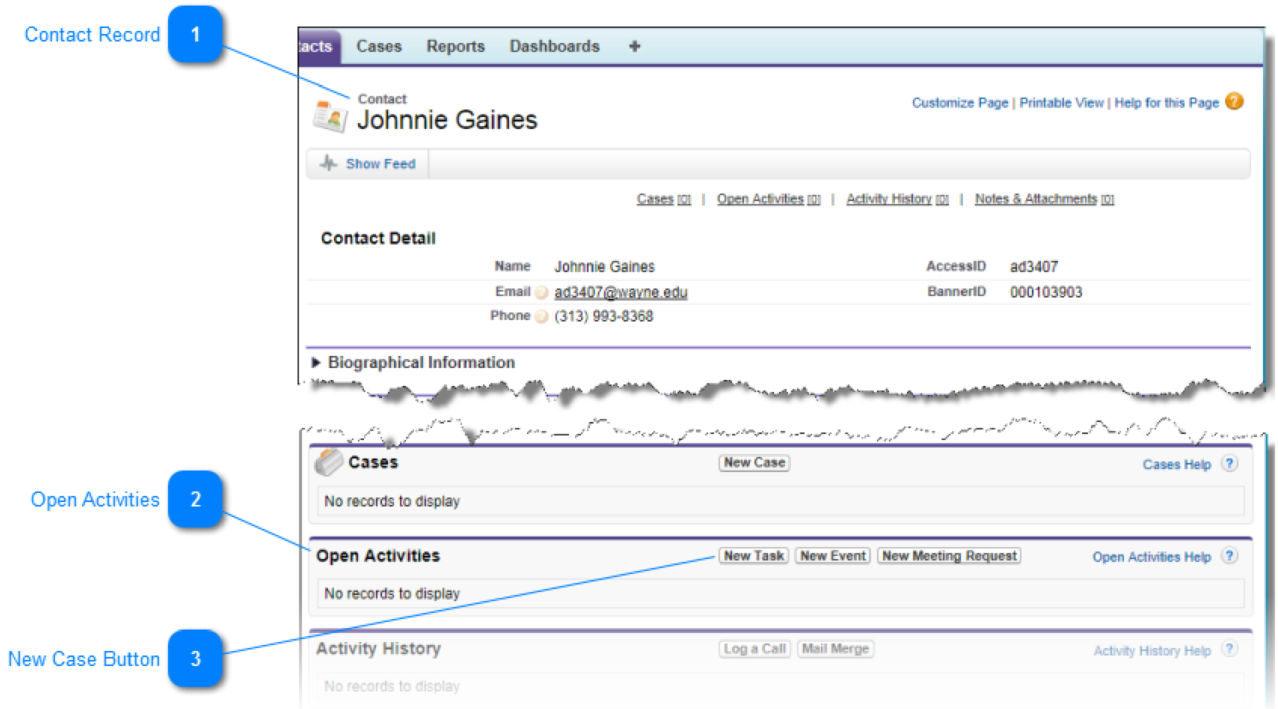
3 New Task Button



Click the New Task button.

See Completing a New Task for instructions on entering information into the New Task fields.

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.

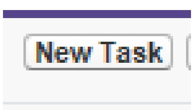
1 Contact Record

Open the desired **Contact** record.

2 Open Activities

Scroll to the **Open Activities** section.

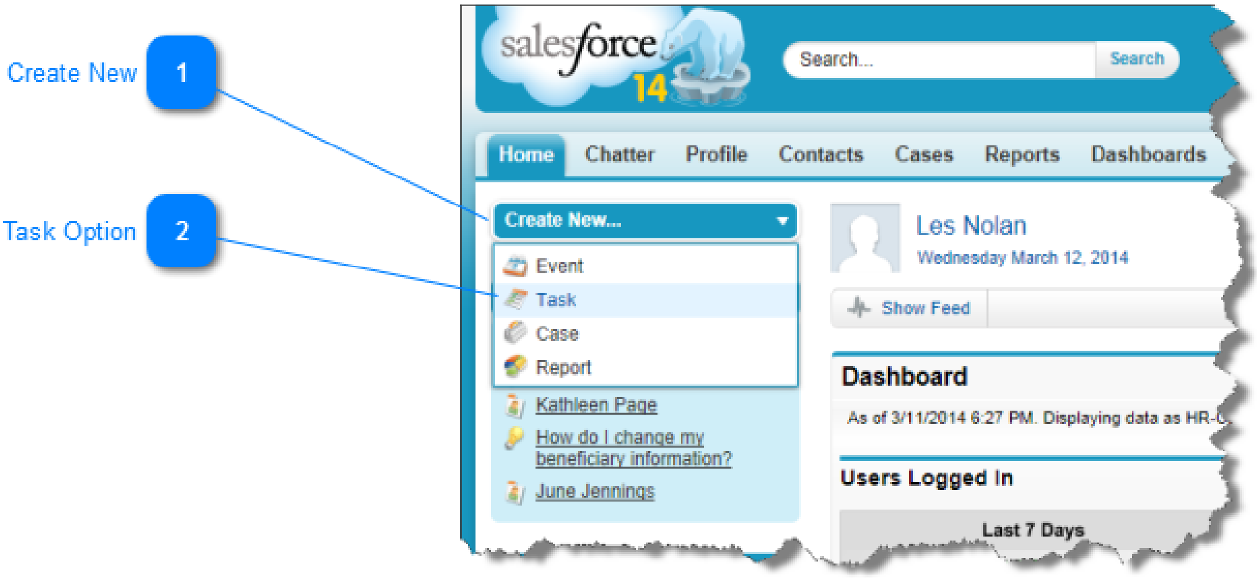
3 New Case Button



Click the **New Case** button.

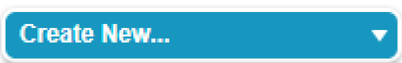
See [Completing a New Task](#) for instructions on entering information into the New Task fields.

Creating a New Task From The Home Tab or Navigation Panel



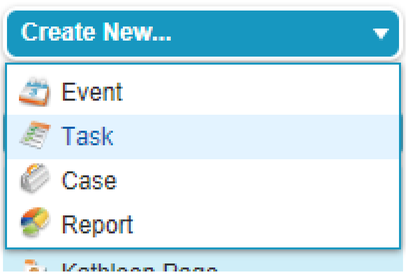
If a Task is not related to a contact or case, you can create a New Task from Create New on the Navigation Panel. However, if this task is related to a case or a contact, you must be entered information manually

1 Create New

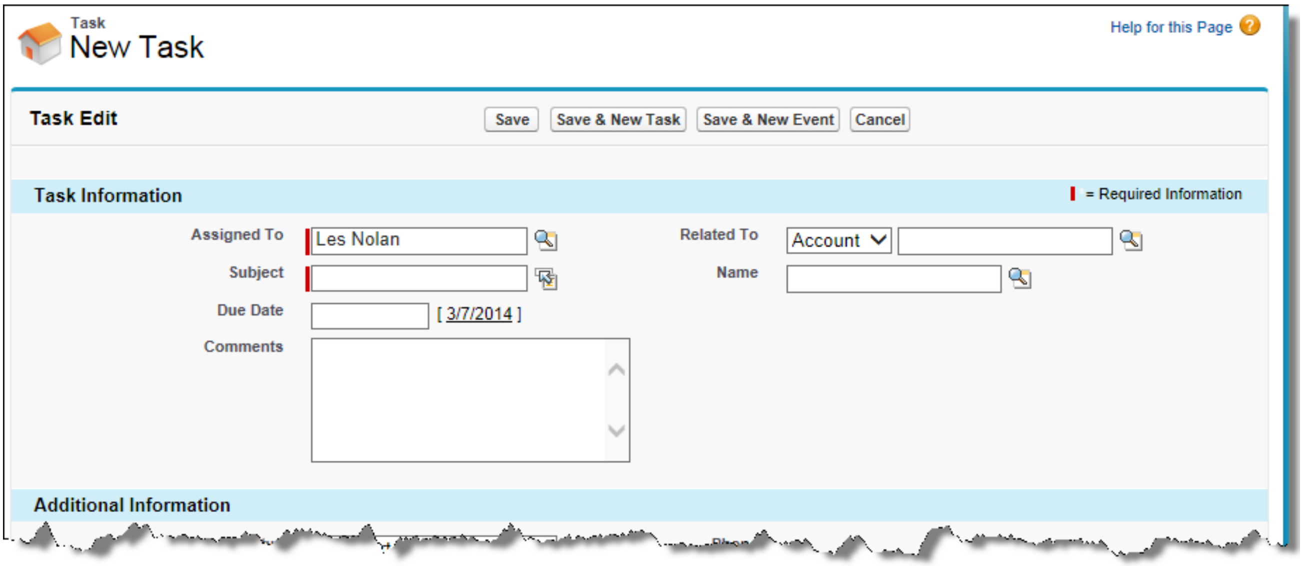


Click the **Create New** pull-down menu.

2 Task Option

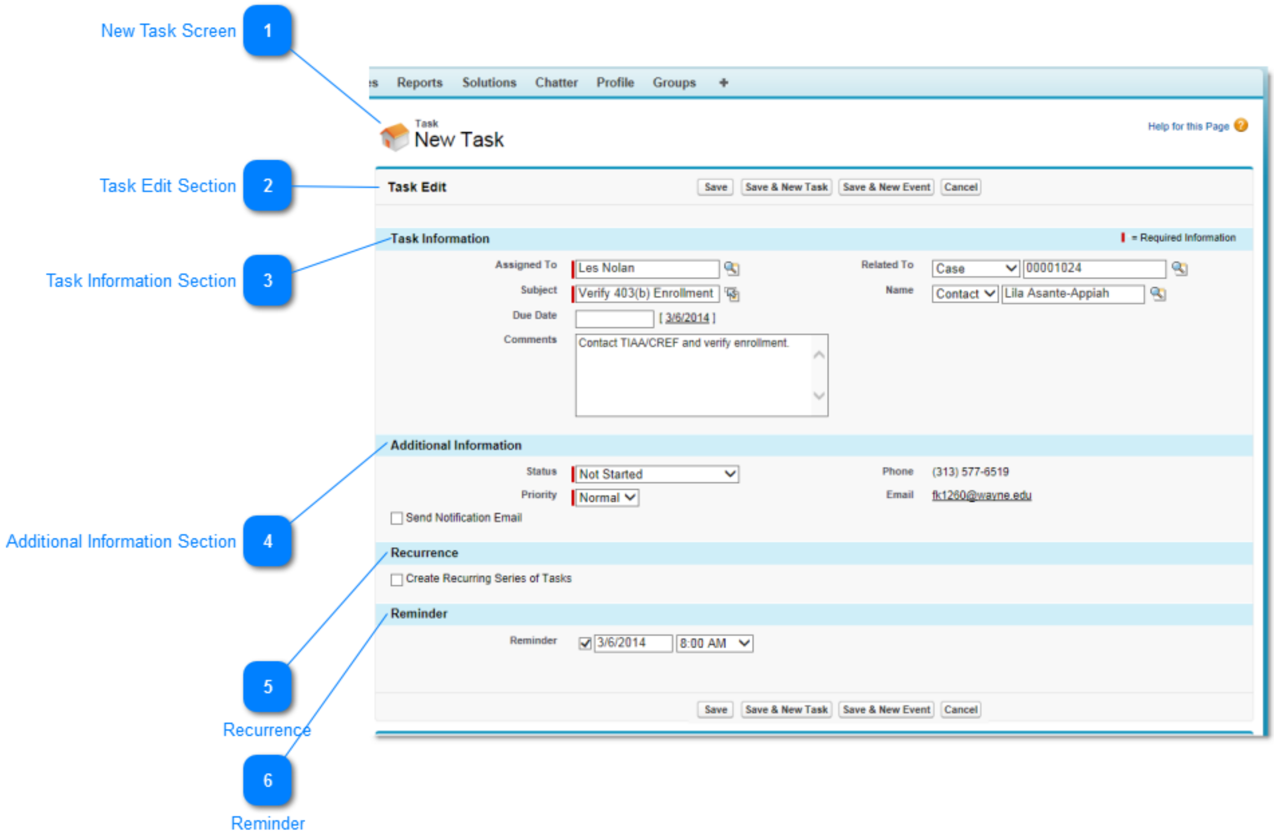


Click the **Task** option. The **New Task** screen will display. Because this Task was not created from a Case or Contact screen, the fields that would be auto-populated are blank. If this Task is related to a Case or Contact, you must manually enter the information.



See Completing a New Task for instructions on entering information into the New Task fields.

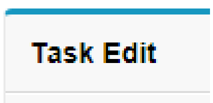
Completing a New Task



1 New Task Screen

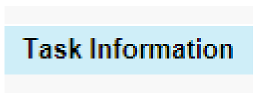
Notifies you that this is the screen for creating a New Task.

2 Task Edit Section



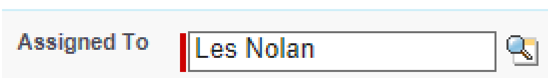
Indicates the screen is in Edit Mode.

3 Task Information Section



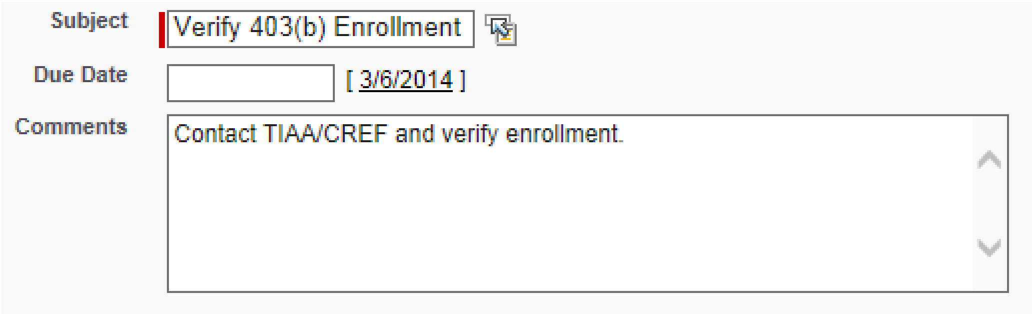
The following fields auto-populate from the Case information:

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



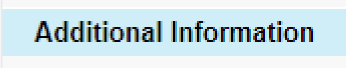
Related To and **Name** fields populate with data from the Case.

Complete the following fields with the appropriate information.



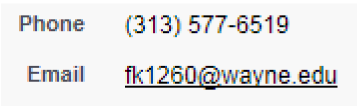
4

Additional Information Section



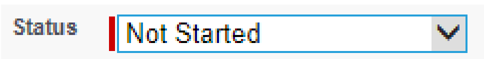
Phone and Email Fields

The following fields auto-populate from the Case information:

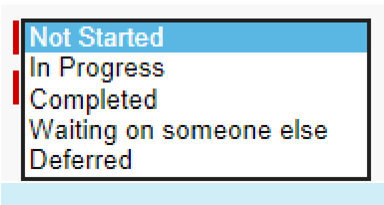


Status Field

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



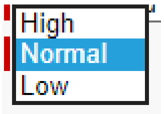
Select the appropriate status.



Priority Field

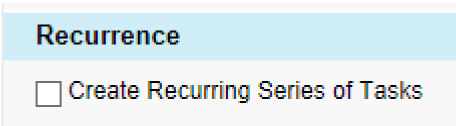
Click the drop-down menu in the **Priority** field.

Select the appropriate Priority.

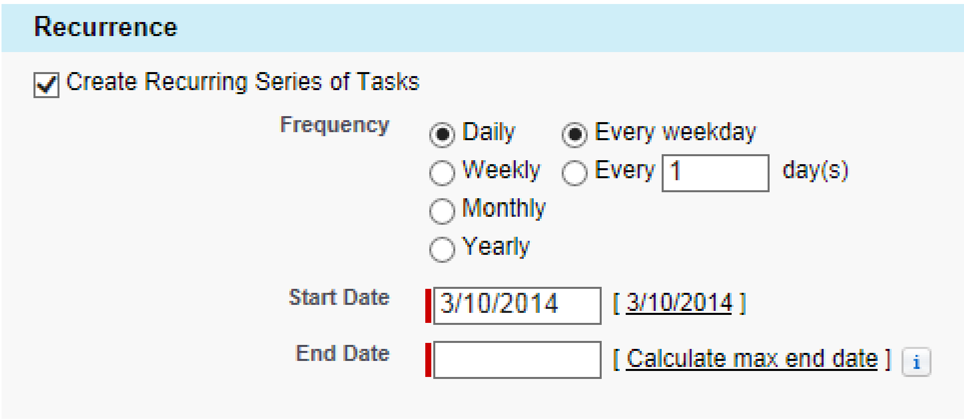


5

Recurrence

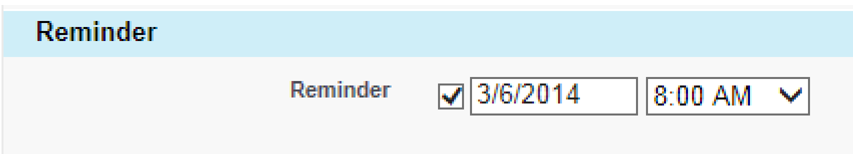


If this is a recurring task, you can click the checkbox to display the controls for setting the recurrance.



6

Reminder



The default is for the new task to have a reminder. Uncheck the checkbox to remove the reminder.

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.

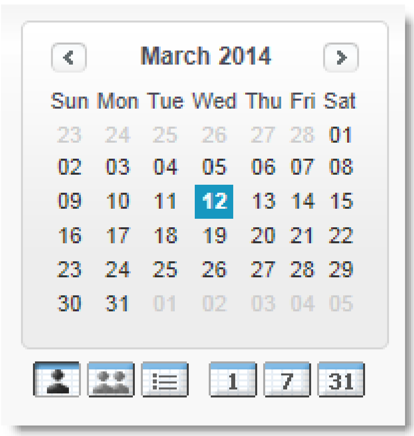
A New Events can be created from:

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

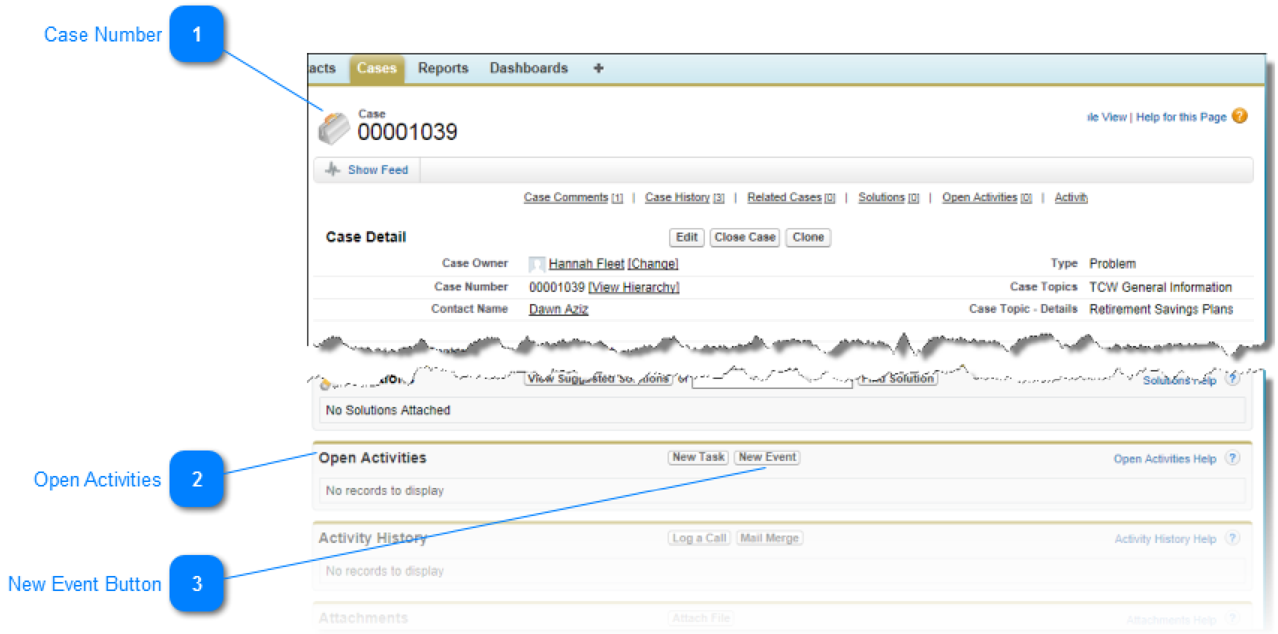
Events created from an **Open Case** or **Open Contact** are automatically related to the case or contact from which they were created.

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.

Events are scheduled into the Salesforce calendar.



Creating a New Event From an Open Case



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. 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.

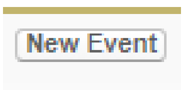
1 Case Number

Open the related **Case**.

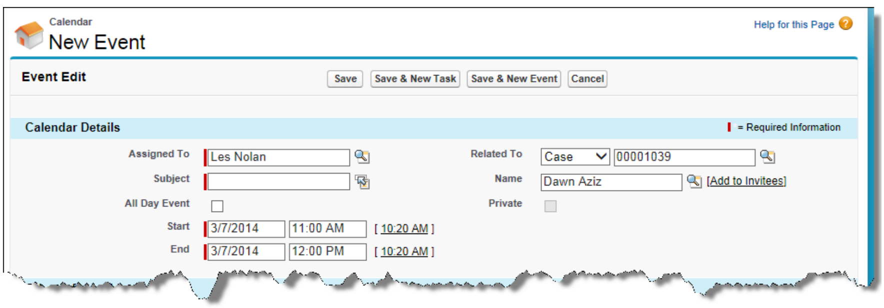
2 Open Activities

Scroll to the **Open Activities** section.

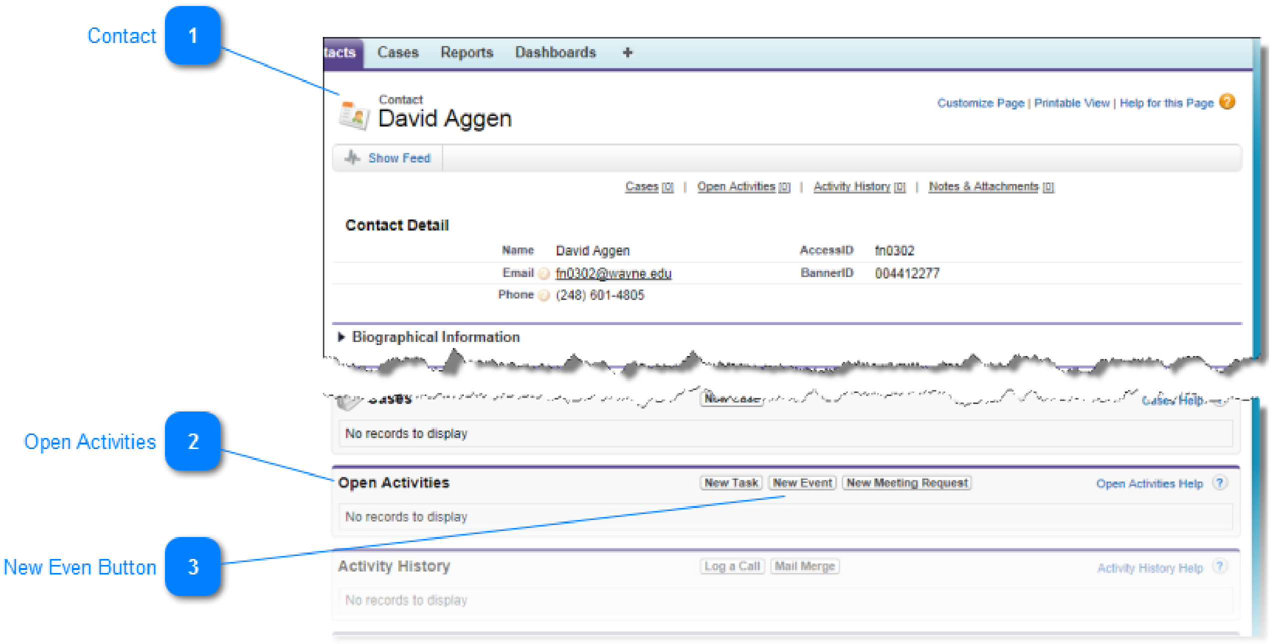
3 New Event Button



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



Creating an Event From an Open Contact

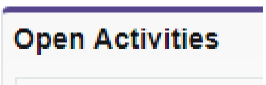


If a **Event** relates to an employee but not a case, you can create the **Event** from the employee's contact screen.

1 Contact

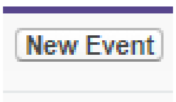
Open the desired **Contact**.

2 Open Activities

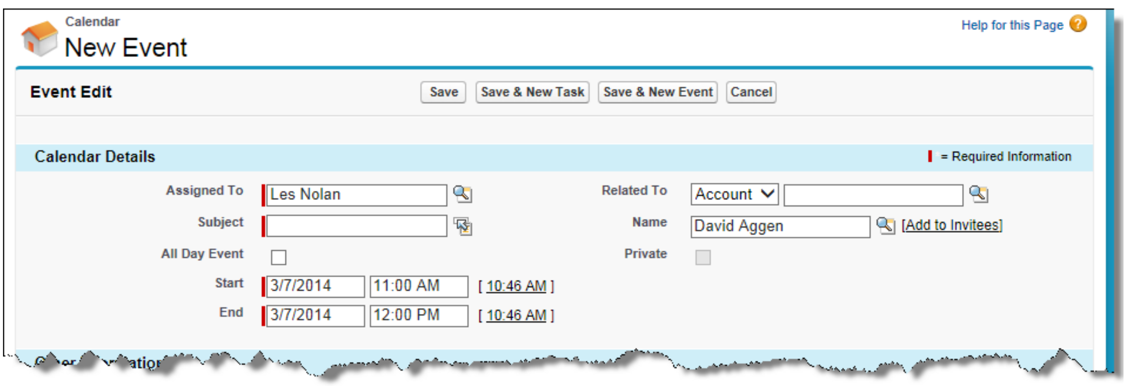


Scroll to the **Open Activities** section.

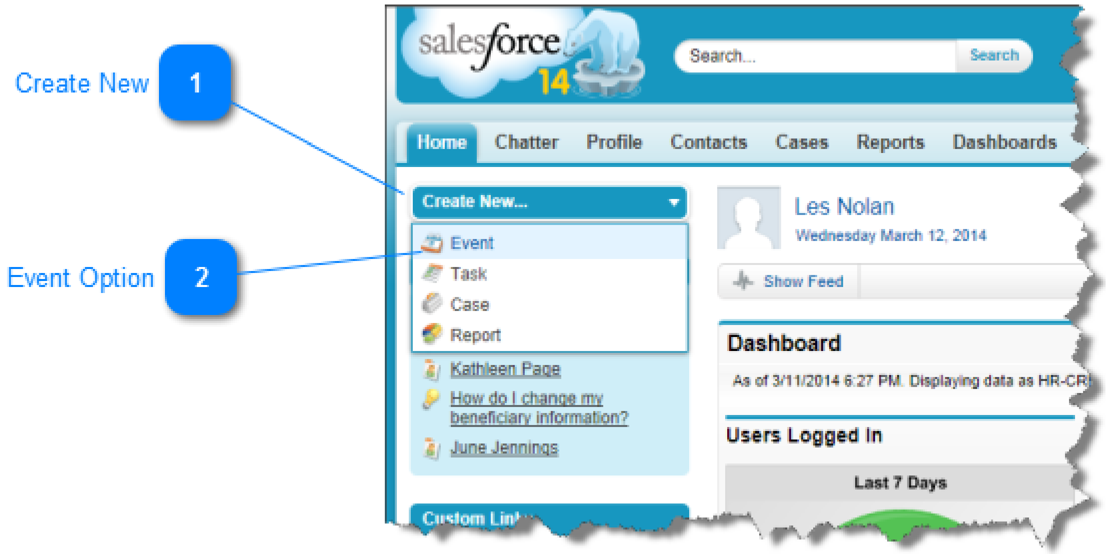
3 New Even Button



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

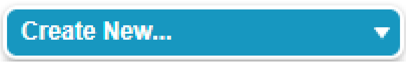


Creating a New Event From The Home Tab or Navigation Panel



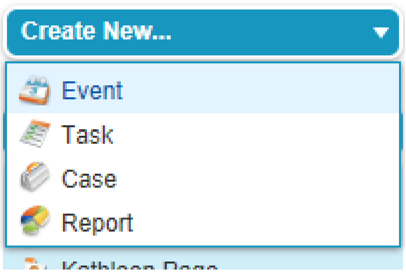
An **Event** created from **Create New** will be a stand-alone event. It will not be related to a case or a contact.

1 Create New



Click **Create New** in the navigation panel.

2 Event Option



Click **Event** to create a new event.

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.

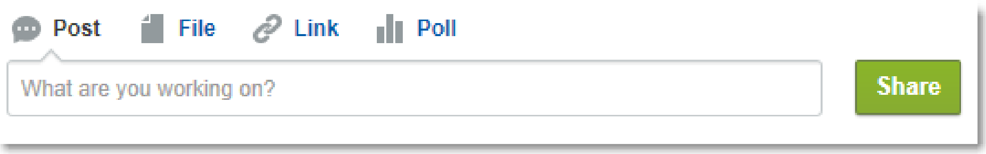
From the Chatter tab you can:

- 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.

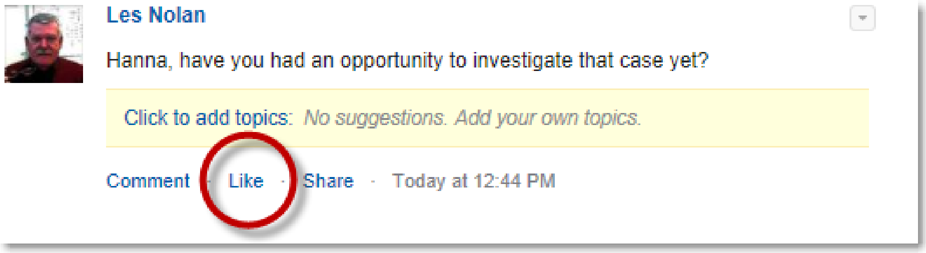


1. Above your feed, click Post or just click the text box.
2. Type your update in the text box. You can add hashtag topics and mention people.
3. Below the text box, select My Followers to publish the post on your profile, or select A Group, type part of the group’s name in the Search Groups field, and 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

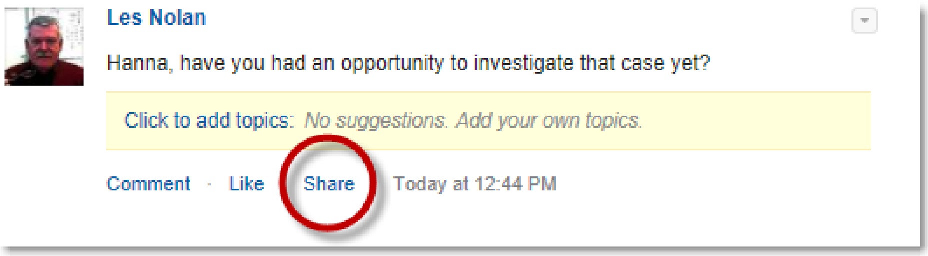
Below a post or comment, click Like.



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



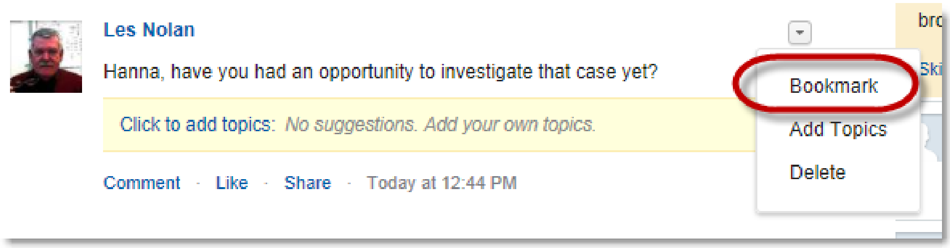
You can share public Chatter posts that contain text, links, or files to your profile, with a group, or using a link to the post.
When you share a post, keep in mind:

- 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.

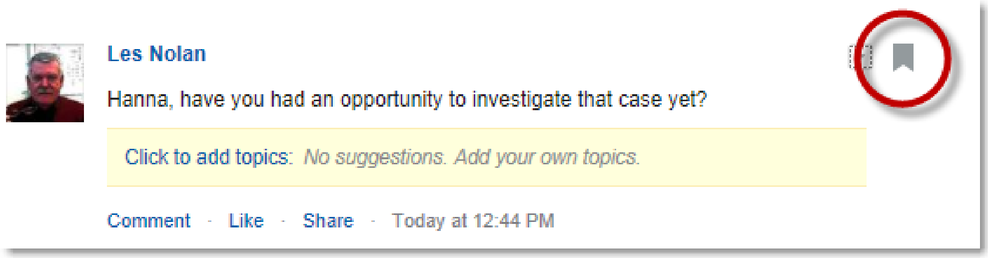
When someone shares your post, you receive an email notification. To change your email notifications, from Setup, click My Chatter Settings | Chatter Email Settings.

Bookmark a Post

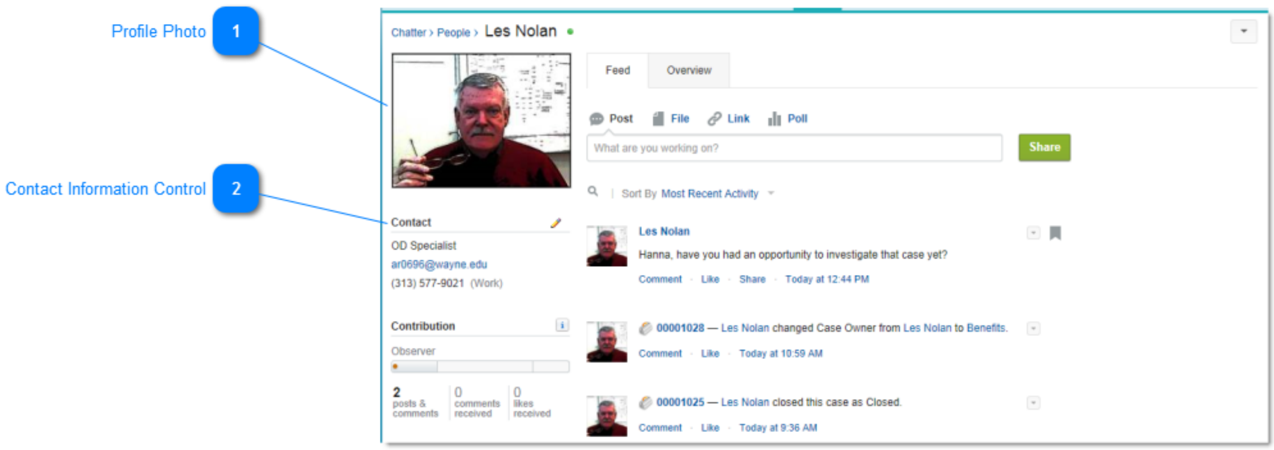
Bookmarking a post lets you keep track of posts you're interested in.



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 bookimarks.



Customizing Your Profile



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

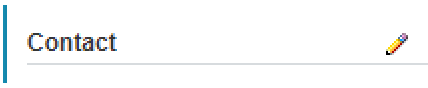
1 Profile Photo

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

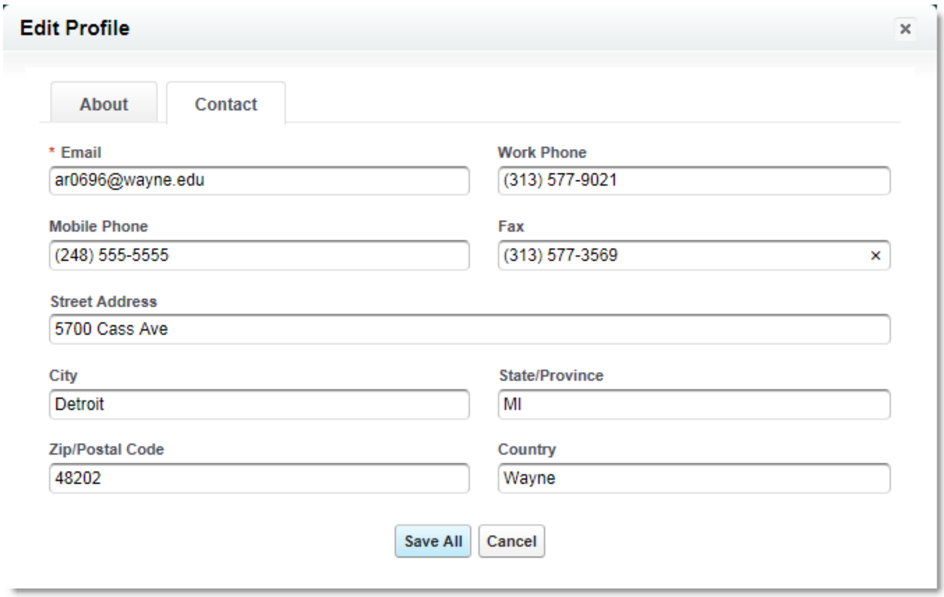
When the **Upload Profile Photo** dialog box displays, browse your PC until you locate your profile photo. Click the **Show My Photo on Publicly Accessible Pages**, so your photo will display. Click **Save**.

Your Profile Photo has been updated.

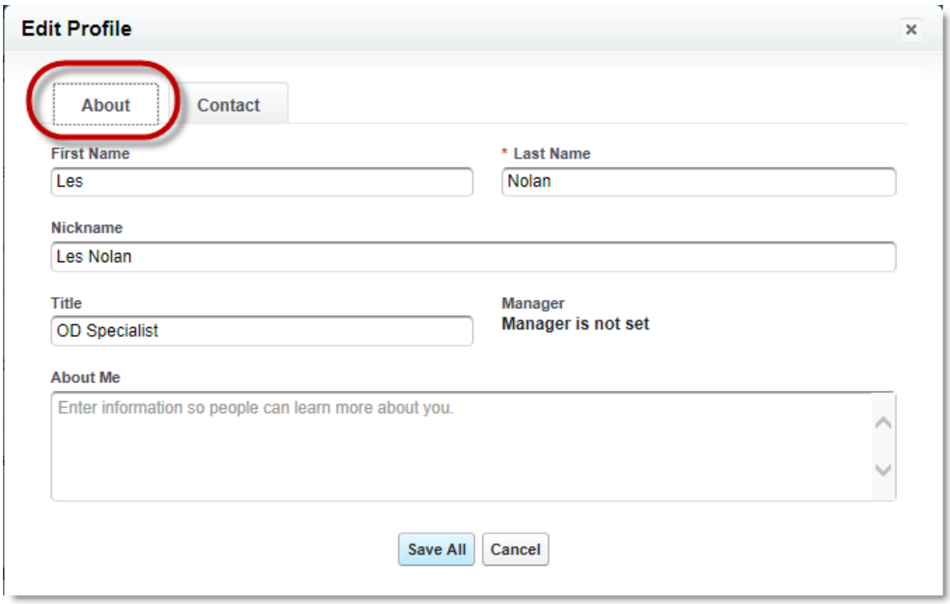
2 Contact Information Control



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.



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.