Northern Arizona University

Salesforce Quick Guide

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1. Searching Contacts

1.1 Common Searches

Fields	Search Format	Notes
Name	Jane Marie Doe	Search any combination of First, Middle and Last with a single space in between
EMPLID	123456	EMPLIDs are stored as plain text. Leading zeros can be left off in searches for EMPLIDs or other non-date numbers such as Case Numbers or Knowledge Article Numbers
Birth Date	01091990	Search using two digits for the month and day and four for the year without dashes or slashes (MMDDYYYY)
Phone	928/279-1000 928*279*1000	Search based on the standard PeopleSoft formatting, or use asterisks to replace symbols
Email	jane.doe@email.com	Format email just as expected
Address	1015* San Francisco* Flagstaff	Use asterisks to improve chances of finding a match since addresses can be formatted many different ways
Different spellings and nicknames	Nic* Smith to find Nic, Nicolas, Nick, Nicholas, etc.	Using an asterisk is a good way to cover all bases when it comes to different name spellings and nicknames.

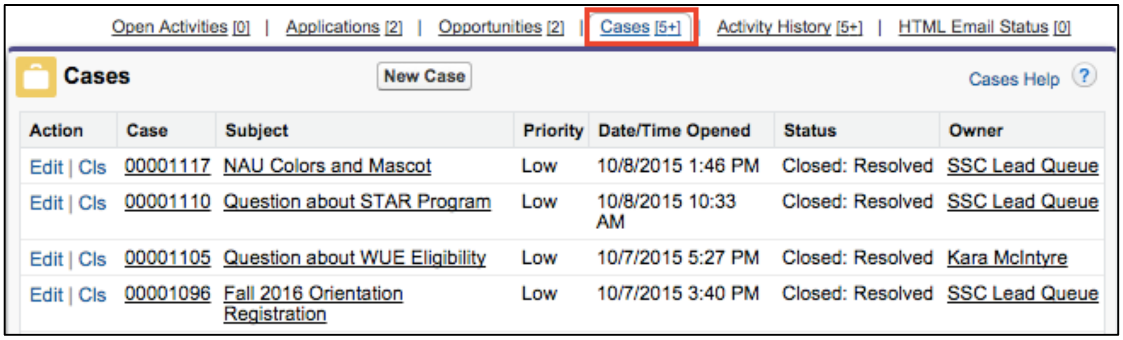
1.2 Advanced Searches

Fields	Search Format	Notes
Name + City + State	Jane Doe Flagstaff AZ	Searches will look for any combination of these characters across multiple fields
Name + Birth Date	Jane Doe 01311990	Use the same formatting for standard searches, just separate each field search by a space
Middle Name + Last Name	Marie Doe	This search will look for any combination of these characters across multiple fields
Name + Birth Date	Jane Doe 01311990	Use the same formatting for standard searches, just separate each field search by a space

2. Searching Cases

2.1 Search Using Global Search

1. Use the global search to find the contact.
2. Hover the “Cases” link
3. All cases associated with the contact will appear in the list

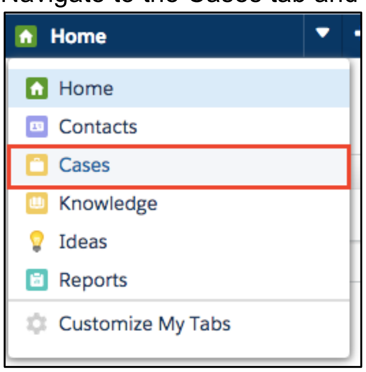

Open Activities [0] | Applications [2] | Opportunities [2] | Cases [5+] | Activity History [5+] | HTML Email Status [0]

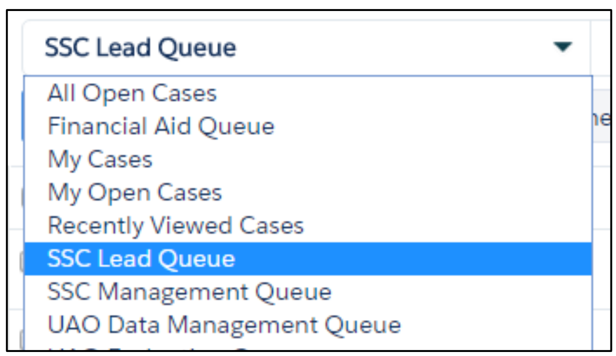
Cases   New Case   Cases Help

Action	Case	Subject	Priority	Date/Time Opened	Status	Owner
Edit | Cls	00001117	NAU Colors and Mascot	Low	10/8/2015 1:46 PM	Closed: Resolved	SSC Lead Queue
Edit | Cls	00001110	Question about STAR Program	Low	10/8/2015 10:33 AM	Closed: Resolved	SSC Lead Queue
Edit | Cls	00001105	Question about WUE Eligibility	Low	10/7/2015 5:27 PM	Closed: Resolved	Kara McIntyre
Edit | Cls	00001096	Fall 2016 Orientation Registration	Low	10/7/2015 3:40 PM	Closed: Resolved	SSC Lead Queue

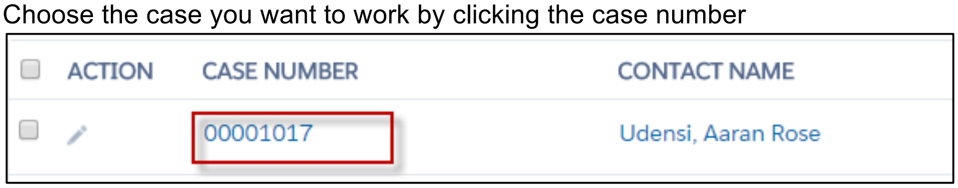
2.2 Search Using List Views (Queues)

1. Navigate to the Cases tab and choose the list view you would like to work on





2. Choose the case you want to work by clicking the case number

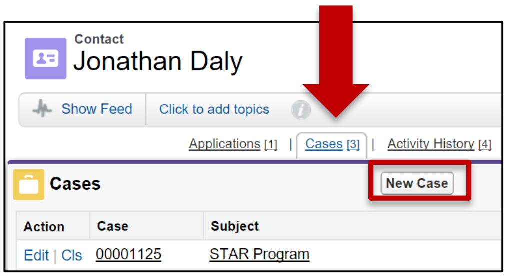


NOTE: the Contact page will automatically open when you click on the case. You can view the student information by clicking on the Details tab.

3. Creating Cases

3.1 Create a Case From a Contact

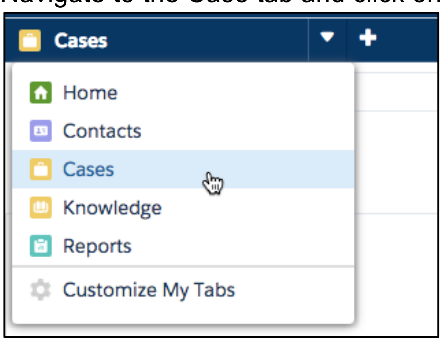
1. Hover over the Cases quick link at the top of the Contact page (Click on the Contact Name to pull up the Contact record page if it is not already open) and click on New Case

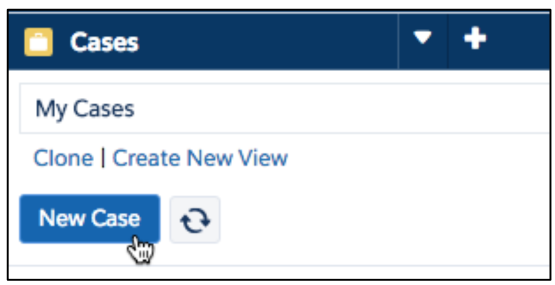


2. Update required fields
3. Leave “Send notification email to contact” checked to notify Contact and Save

3.2 Create a Case Without a Contact

1. Navigate to the Case tab and click on the “New Case” button





2. Leave Contact blank, but fill out all other fields according to the normal process
3. Save the Case then navigate to the Feed view
4. Add the name and any contact information (email and phone) connected to the Case as a Post
5. When sending an email, type or copy and paste the email address into the To field

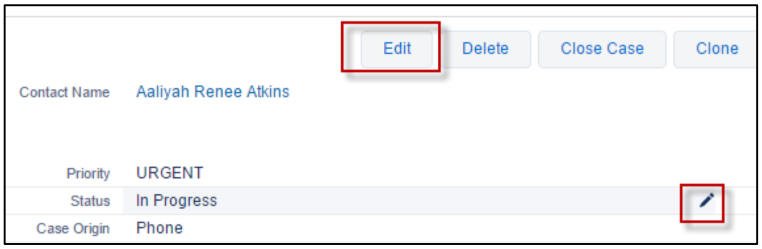
3.3 Connect a Contact to a Case

1. Navigate to the Detail view, click the Edit button and type the name into Contact Name
2. Click on the magnifying glass and select the correct Contact from the Lookup page

4. Editing Cases

4.1 Edit or Reopen a Case

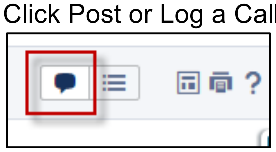
1. If you are on the Contact page, hover over the Cases quick link, find the existing Case and click on the Edit link next to it
2. If you are viewing the Case, navigate to the Detail view and either click the "Edit" button, or update each field one by one by double-clicking on the pencil icon

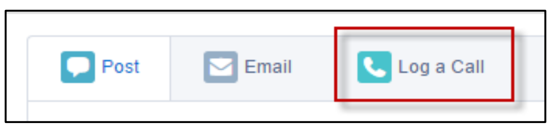


3. Update the Status to anything other than a "Closed…" option to open it
4. Update any other fields needed and Save

4.2 Post or Log a Call

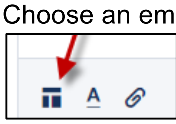
1. Navigate to the Feed view of a Case
2. Click Post or Log a Call, enter comments and click Save





4.3 Email From a Case

1. Navigate to the Feed view of a Case and select Email
2. Confirm the From address is student.solutions@nau.edu
3. Choose an email template by clicking the template icon in the bottom left corner of the Email

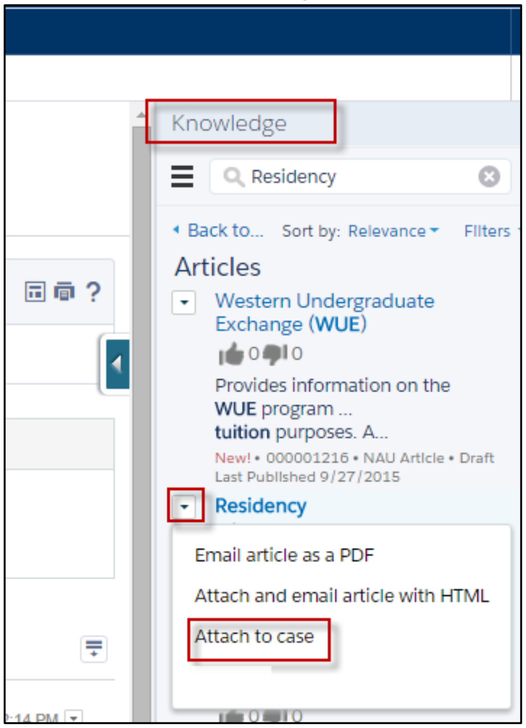


4. Attach Knowledge Base articles by expanding the Articles section below the email, hovering over the Action dropdown next to the Article you want and selecting "Email Article as PDF"

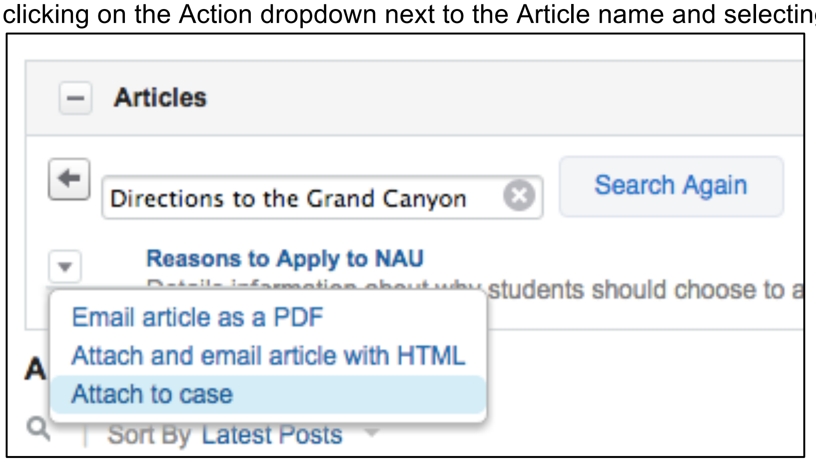
5. Click Send Email

5. Attaching Knowledge Articles to Cases

1. The Case must be created and saved for the first time before attaching an Article
2. Attach the Article from the Knowledge sidebar by clicking on the Action dropdown next to the Article name and selecting "Attach to Case"



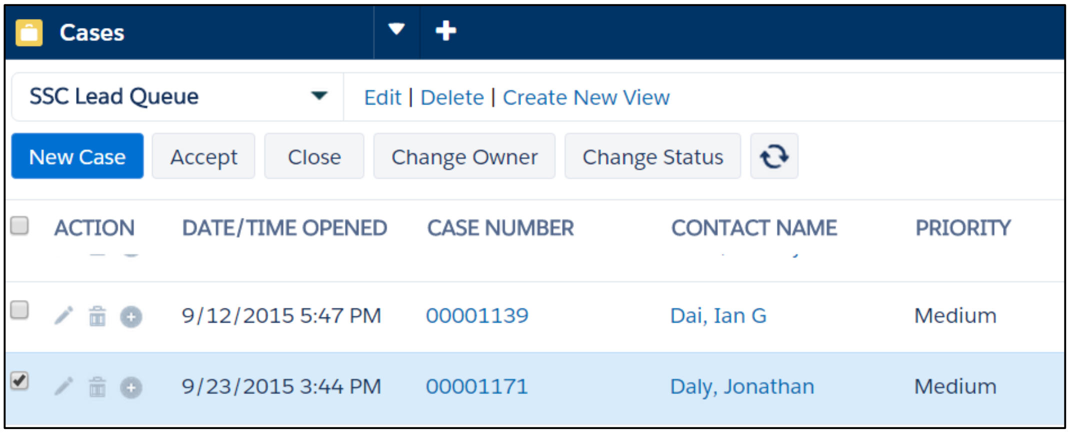
3. An Article can also be attached from the Case Feed view by expanding the Article section, clicking on the Action dropdown next to the Article name and selecting "Attach to Case"



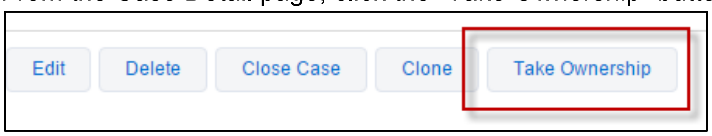
6. Case Ownership

6.1 Accept Ownership of a Case

1. From the Case tab, select the Case and click the "Accept" button



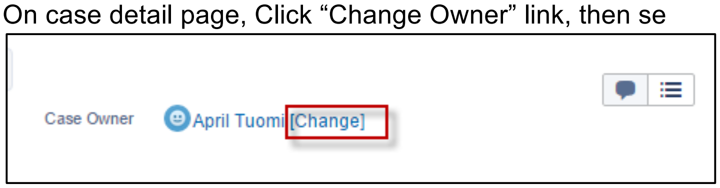
2. From the Case Detail page, click the "Take Ownership" button



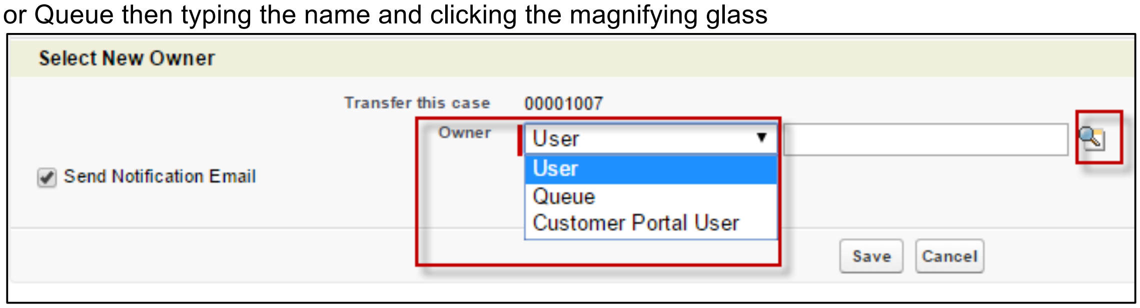
6.2 Change Case Owner

Alternatively, if the case must be routed to another user or queue for follow-up, use the Change Owner link in the Owner field to send the case to the appropriate person(s)

1. On case detail page, Click "Change Owner" link, then se



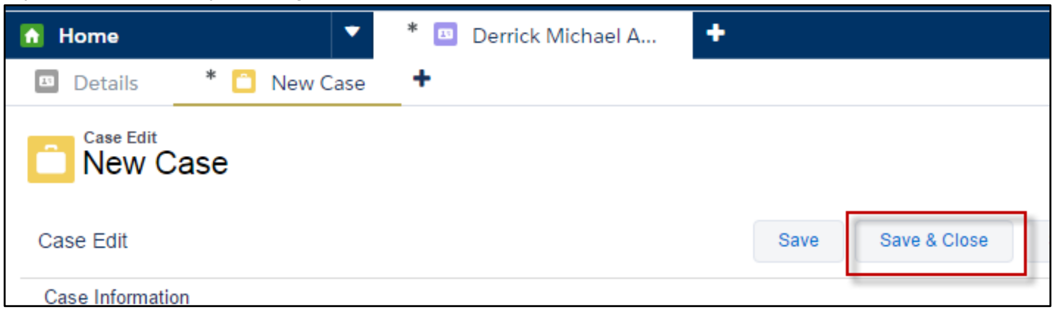
2. Set "Send Notification Email" to true, then select the appropriate Case Owner by choosing User or Queue then typing the name and clicking the magnifying glass



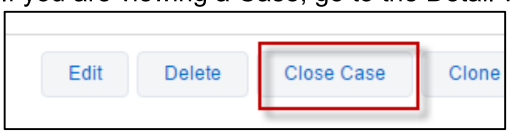
3. Select the correct User or Queue from the Lookup page and click Save

7. Closing Cases

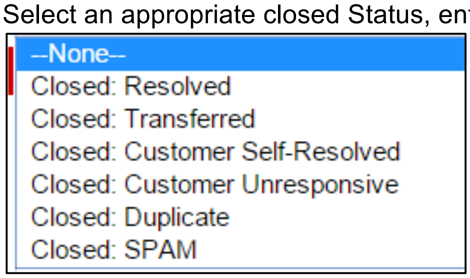
1. If you are currently editing the Case, select the "Save & Close" button



2. If you are viewing a Case, go to the Detail view and click the "Close Case" button



3. Select an appropriate closed Status, enter a Resolution, and verify the other fields are correct



4. Leave "Send notification email to contact" checked to notify the student and click Save