Case Management for Field Operations (Offbooks)

Service

Use form to create 'Schedule Offbooks' case

Salesforce

Create Parent case and assign to **ART** queue

Create Child case and assign to **Location** (market) queue

Operations Support

Open **Residential Operations Support** queue

View Child case

Update Case Owner to Operation Support user's name

Call customer and schedule move

Update Case Owner to **Location**

ART

Work Parent case to fix account

It's possible that ART is able to fix the account/order and handle scheduling and close the case before (or even after) the location gets to it, and in that event, ART would close both parent and child cases.

Parent case closed

Work and close Parent case

Assign Child case to **Residential Operations Support** queue

Determine via reporting that Child case is closed

Fix order

Open **ART - Urgent** queue

Determine if can provide requested information

Cannot

Update Case Owner to **Supervisor** queue

Can

Add requested information to Child case

Update Child case status to '**In Process**'

View case

Open **ART – Urgent** queue

Field Operations

Open **Location** queue

View Child case

Change Child case status to '**In Process**' (if not already **In Process**)

For Field Operations, the manager(s) of the Queue can determine on a case by case basis if Case Owner should remain as Location or be changed to a specific user

Determine if have all information needed

Have all info needed

Don't have all info needed

Change Child case status to '**Waiting for Additional Information**'

Enter information needed in 'Action Taken Notes' field

Change Case Owner to **ART - Urgent** queue

Determine if can perform requested activity

Yes

Perform requested activity

Update case status to '**Resolved**' (closed)

Select Action Taken '**Move Completed**'

Change Case Owner to **ART - Urgent** queue

No

Change Child case status to '**Date Change Needed**'

Select Action Taken '**Unable to Complete Move**'

In Action Taken Notes, enter reason we couldn't complete move

Supervisor

Open **Supervisor** queue

View Child case

Update Case Owner to Supervisor user's name

Add requested information to Child case

Update Child case status to '**In Process**'

Assign Child case back to **Location** queue