# Salesforce Case Management Job Aid

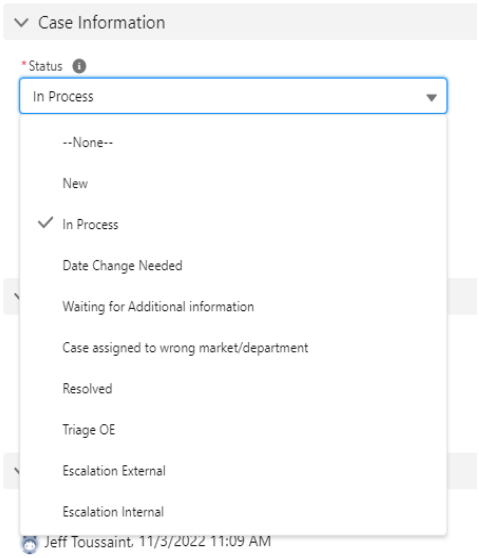
1. **Monitor Daily** to
**ID OFF BOOKS MOVES** needed (Looking 7 days ahead)

2. **Sort by STATUS** and/or **SUBJECT** headers
to list request in the order needed
Keep an eye out for **NEW orders created by SSC!**

3. **Review** each case confirming
**ALL INFO to perform the**
**MOVE TYPE** is completed

4. **Change status** to **"IN PROCESS"**
acknowledge your location
has received the request
**PRINT out "OFFBOOKS"**

*Lots of folks miss this key move!*

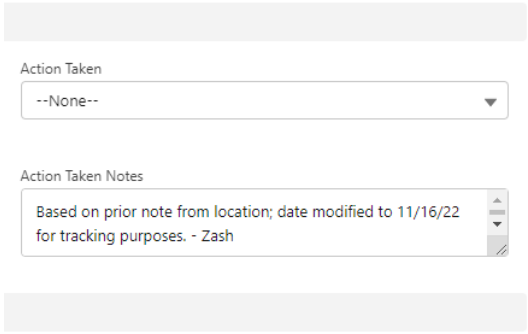



5. **If more INFO is needed**
select "waiting for additional information"
and provide the details of what is needed in
**"Action Taken Notes"** free text box
**Now click SAVE**
**and reassign case back to ART- Urgent queue**

6. Make room for the **OFF BOOKS** move type **for the day of move**

7. **Once** OFF BOOKS MOVE type **is completed**:
Note **DRIVER ID + TIME and DATE** of completion
of move in **"Action Taken Notes"** free text box
Now click **SAVE**
Then change status to **"Resolved"**

*Lots of folks miss this key move!*




8. **IF or when** you cannot resolve at the field level and are unable to complete move type **NOTE REASON** for incomplete move type
Now click **SAVE**
then change status to
**"ART Urgent"** for further resolution