Salesforce Case Management: Creating and Working a Case

This quick reference guide covers the step-by-step process for creating, routing, and working internal requests (aka Cases) to resolution.

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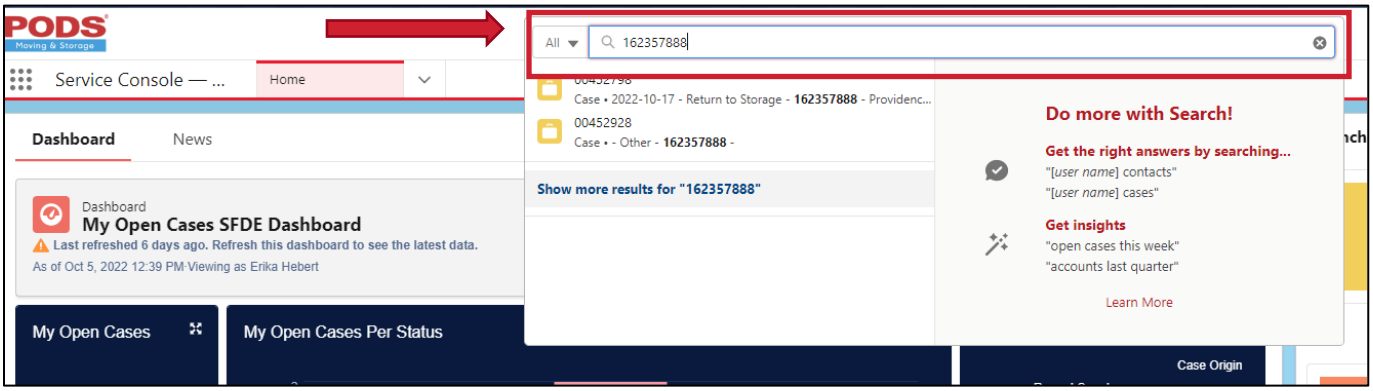
Child Case *11*

Parent Case *11*

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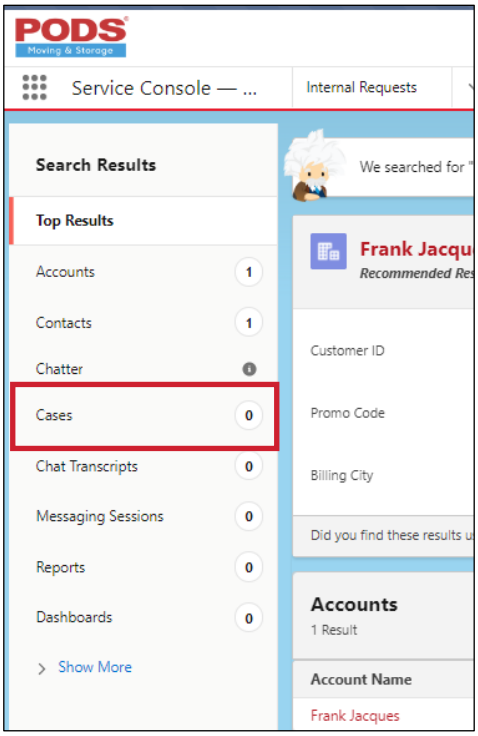
Creating A New Case

1. When a customer indicates they have an open case and/or before creating a new case, do a **Global Search** to determine if there is an existing case. Enter the Customer ID (CID) and hit enter to see the search results.

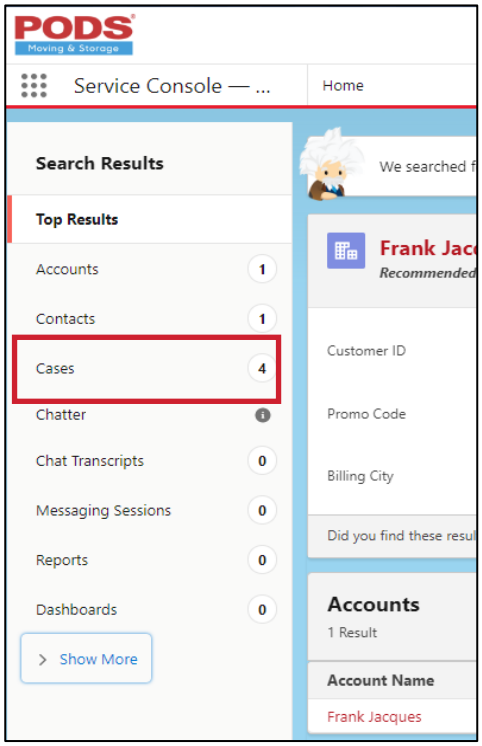


2. Verify if there are any cases by looking at the Cases number in the **Search Results** bar to left of the screen.

If there are *no Cases*, proceed to Page 2 **Creating a New Case – Internal Request.**



If there are *existing Cases*, proceed to Page 5 **Creating a Child Case** if applicable based on your departmental procedures.



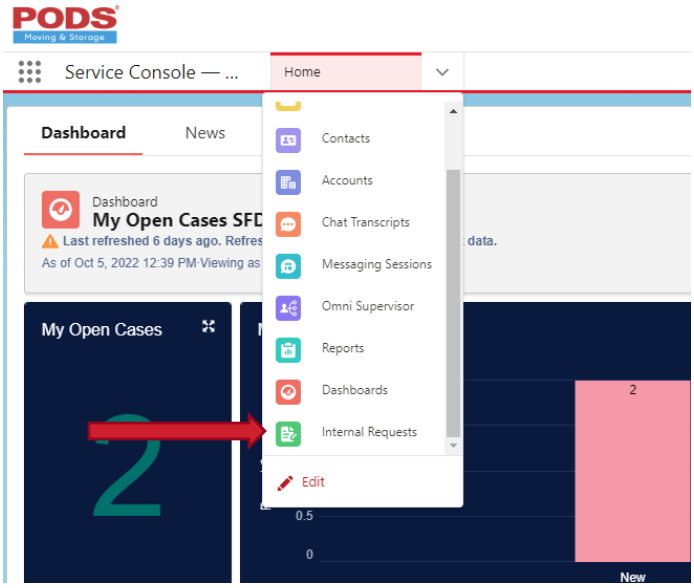
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Creating a New Case – Internal Requests

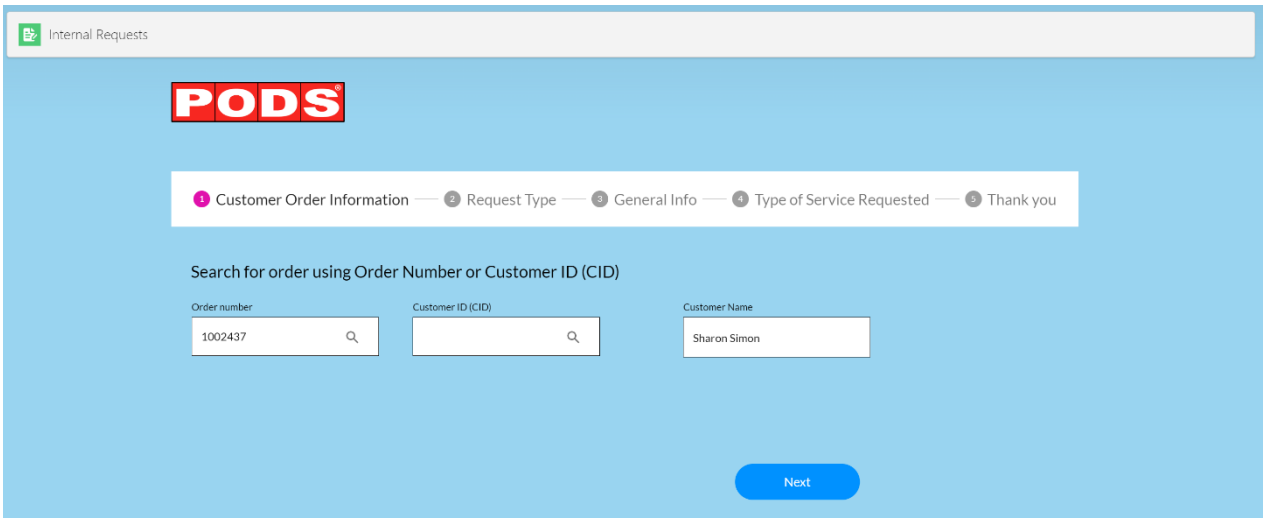
Internal Requests – Use this option to create a new Parent Case and any needed Child Cases. The process is completed in four (or less) easy steps.

1 Customer Order Information — 2 Request Type — 3 General Info — 4 Type of Service Requested — 5 Thank you

From the **Service Console Home Page**, expand the menu and choose **Internal Requests** from the list.

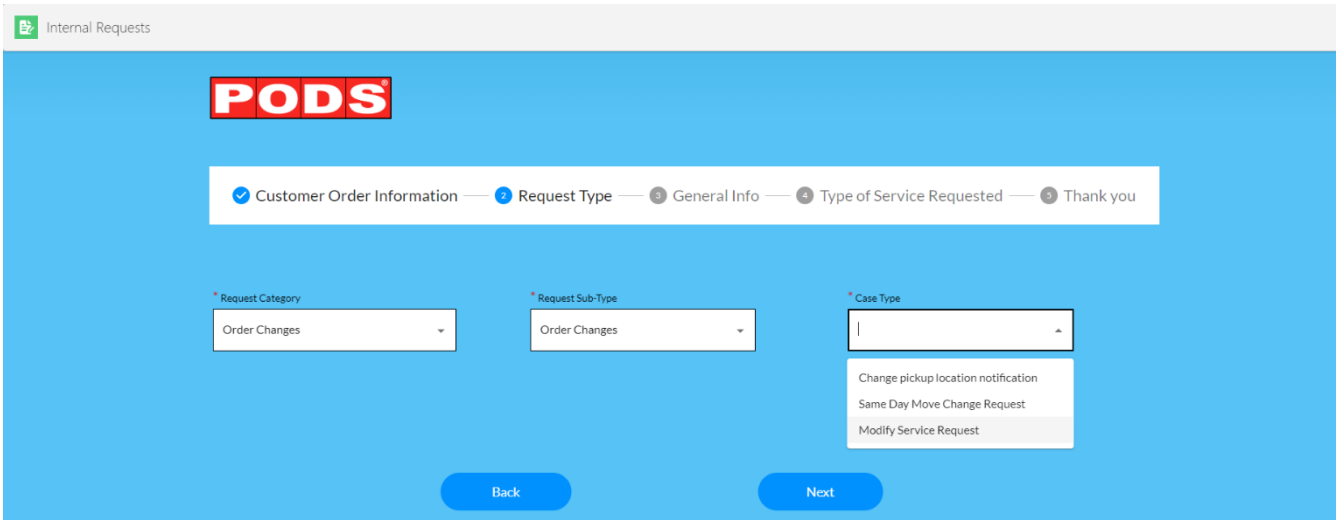


1. **Customer Order Information**: Search for the order using the **Order Number or Customer ID (CID)**. If there are multiple orders on the customer's account, use the order number so the document is created for that order number.
   Note: The preferred method for search is by order number as more general information will be auto populated.

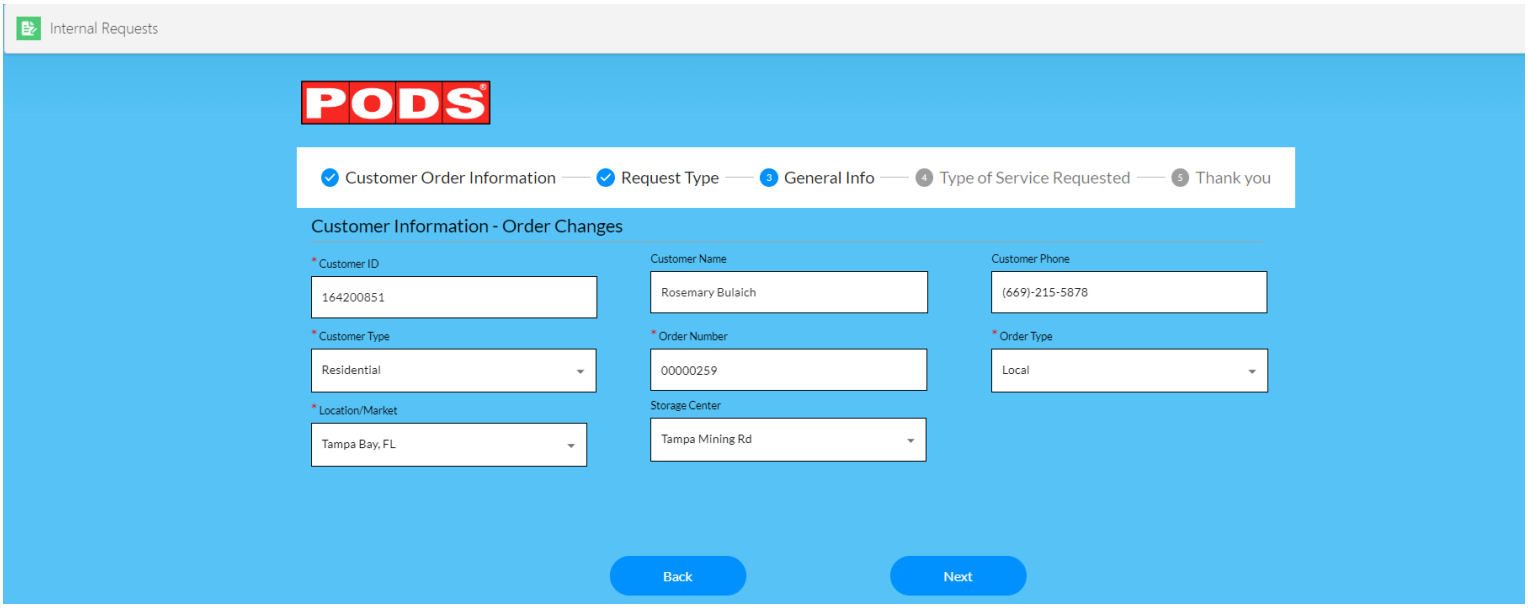


2. **Request Type:** Fill each field out with the available options. Reference the Business Scenarios to Case Type document for a complete list of all available Request Types.
    a. Request Category: Choose from the available options
    b. Request Sub Type: Will populate based on the Request Category selected
    c. Case Type: Will populate based on the Request Sub Type selected

Note: The red asterisk indicates a required field. As you move through each step, use the Back and Next buttons to navigate between steps as needed.



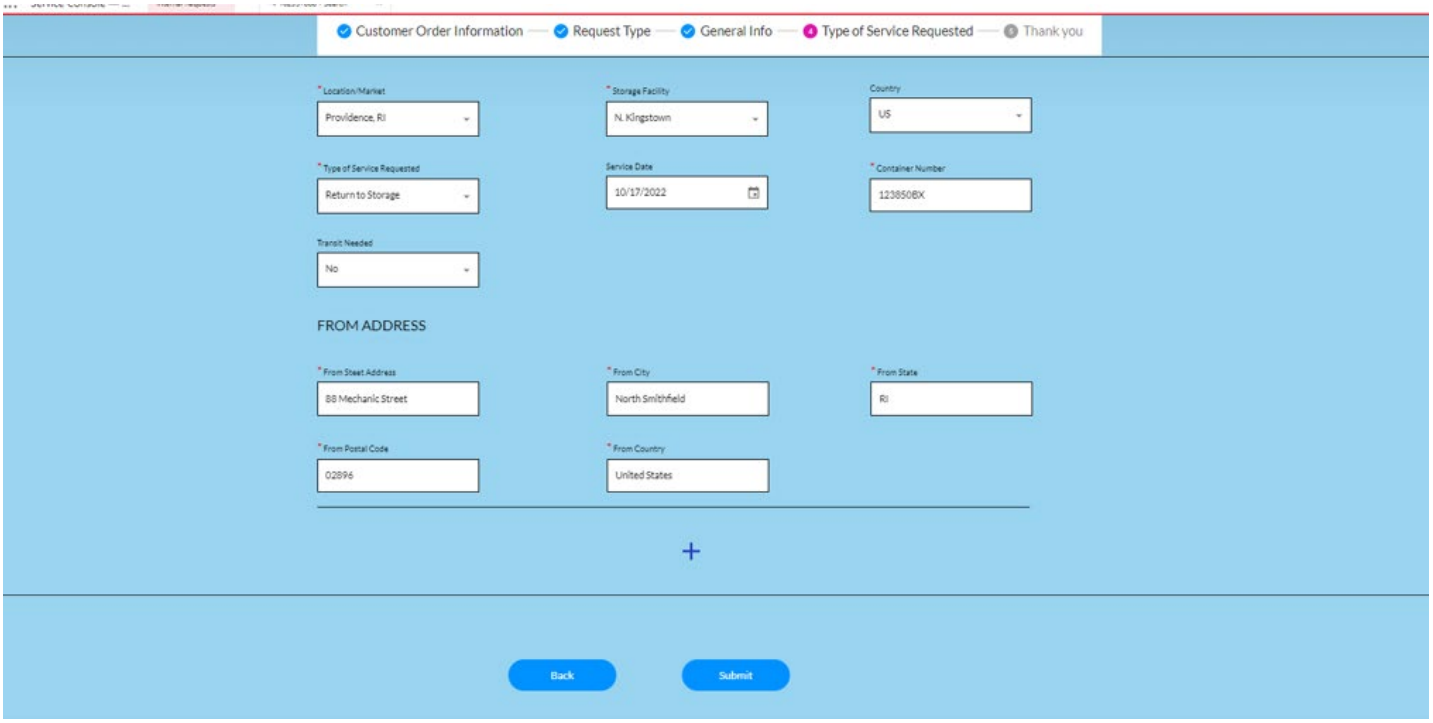
3. **General Info:** If you searched by the order number (preferred method), more of the key customer information is pre-populated for you. Complete the remaining fields with the information related to your case.



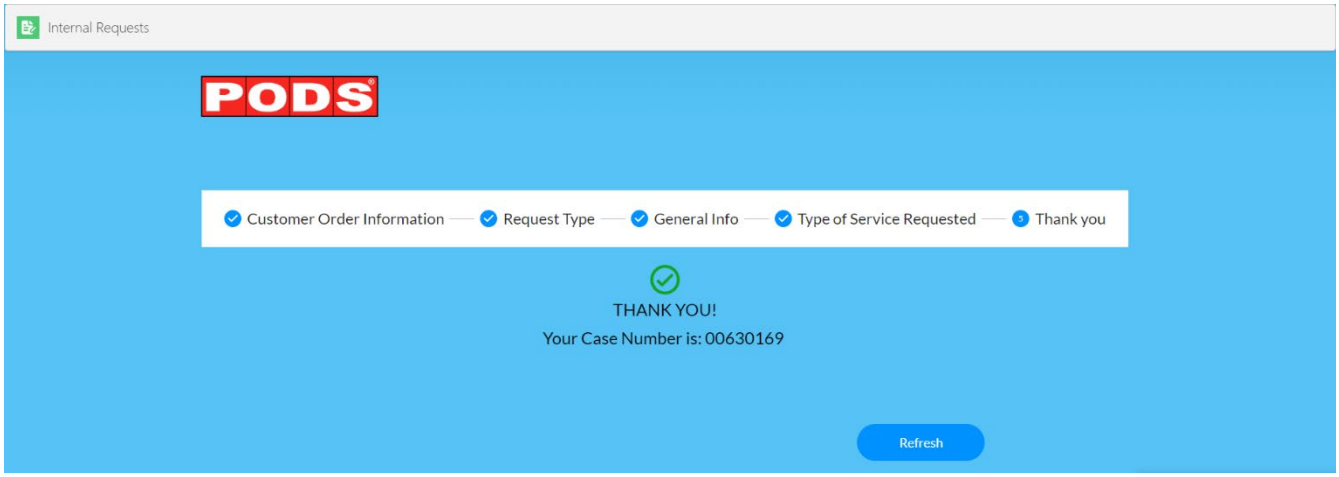
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4. **Type of Service Requested:** Complete the fields on the Type of Service Requested. Based on the value selected in the 'Type of Service Requested' field, **additional dynamic fields** will be displayed.
5. **FOR OFFBOOKS ONLY:** If a child case needs to be created, click the + prompt. Continue to add child cases as appropriate. To delete a child case, click the X.

Note: This step will be completed only when the Type of Request is Schedule Offbooks Move in Step 3.



6. Click Submit to complete the process. You will be navigated to the Thank You page where the Parent Case number is displayed.

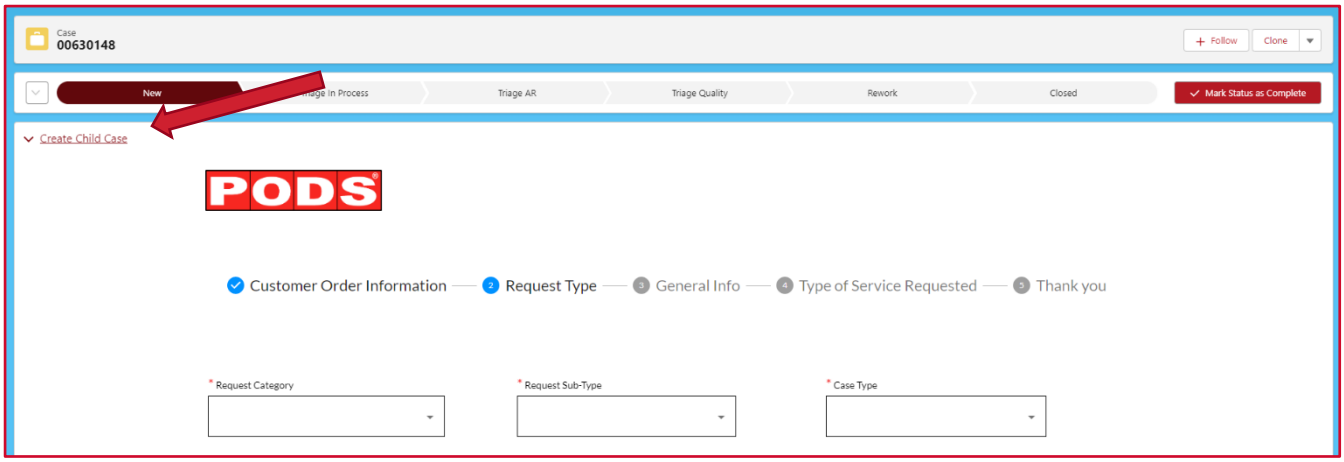


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Creating a Child Case on an Existing Parent Case

Use this option to create a new Child Case on a related existing Parent Case. Through the Global Search step, you will have confirmed that the Parent Case exists and is related to this issue.

1. Creating a Child Case from the Parent Case follows the same steps for creating a new Internal Request. From the Parent Case, expand the **'Create Child Case'** link at the top of the parent case page.

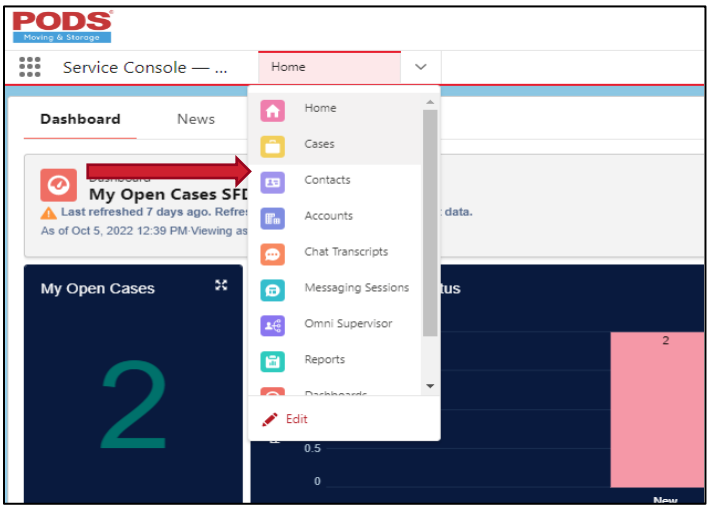


2. Create the Child Case following the steps outlined in the **Creating a New Case – Internal Requests** on Page 3 of this User Guide.

Working and Resolving a Case

Accessing a Queue – When a case has been re-assigned to another department for resolution, it will be assigned to that department's Queue. Cases in a Queue will be assigned from the Queue to individual users/owners (or in some cases another queue) per the department's internal procedures.

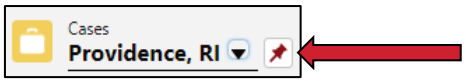
From the **Service Console Home Page**, expand the menu and choose **Cases** from the list.

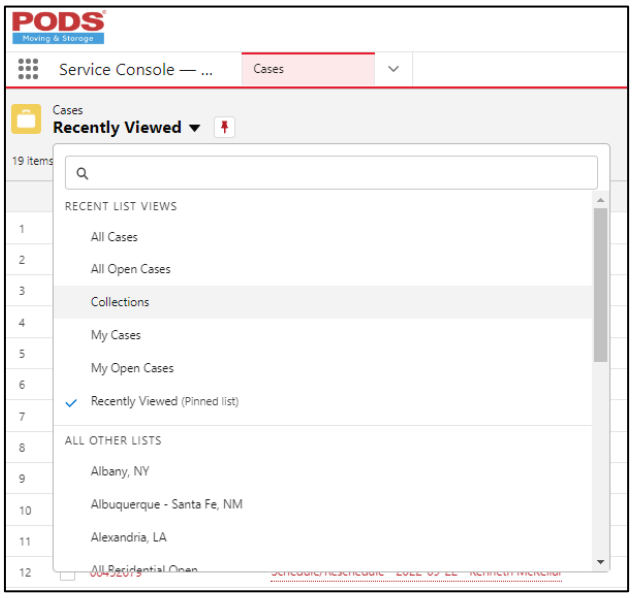


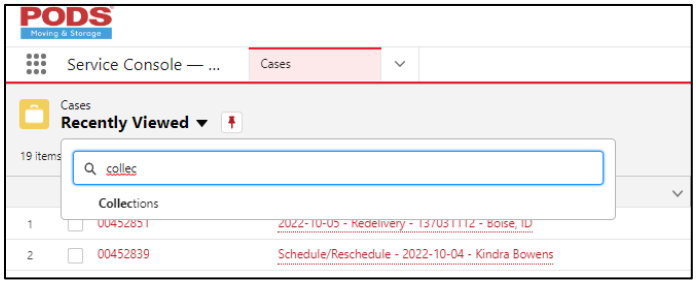
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The menu will default to your pinned list view. Find your location/department on the list OR enter your location/department in the search field.

__Tip:__ Use the __thumbtack icon__ to pin a list view. By pinning a list view, it conveniently becomes the default view each time you access the Cases tab. You can still use the dropdown and search options to locate other list views.





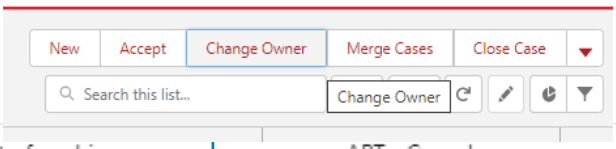


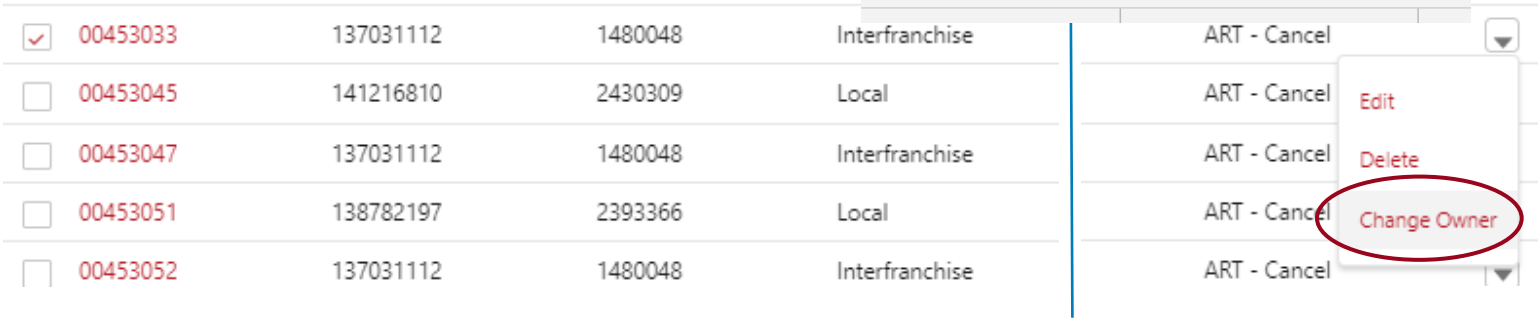
Changing a Case Owner

Locate the case or cases that need to be assigned to a member of your team to be worked. You can assign (or change the owner of) one case or several cases at a time.

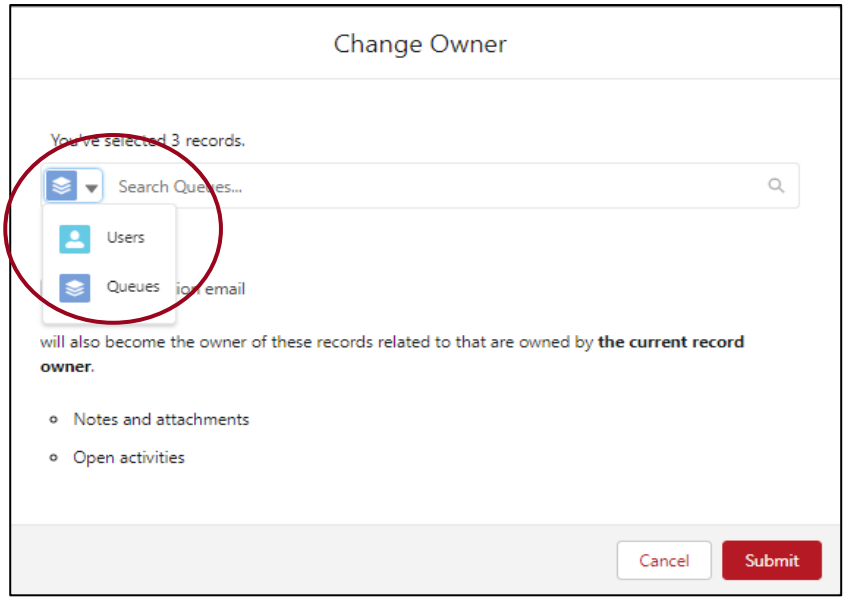
1. Changing One Case: There are two ways to do this. Check the boxes on the case you want to change. Choose the Change Owner button in the top right of the list view OR navigate to the far right of that line and expand the drop-down menu.
2. Changing Multiple Cases: Use the Change Owner button in the top right of the list view. You cannot use the drop-down menu option when changing multiple cases at one time.

Note: You cannot change the Owner of a Case that is not in your Queue or already assigned to you.

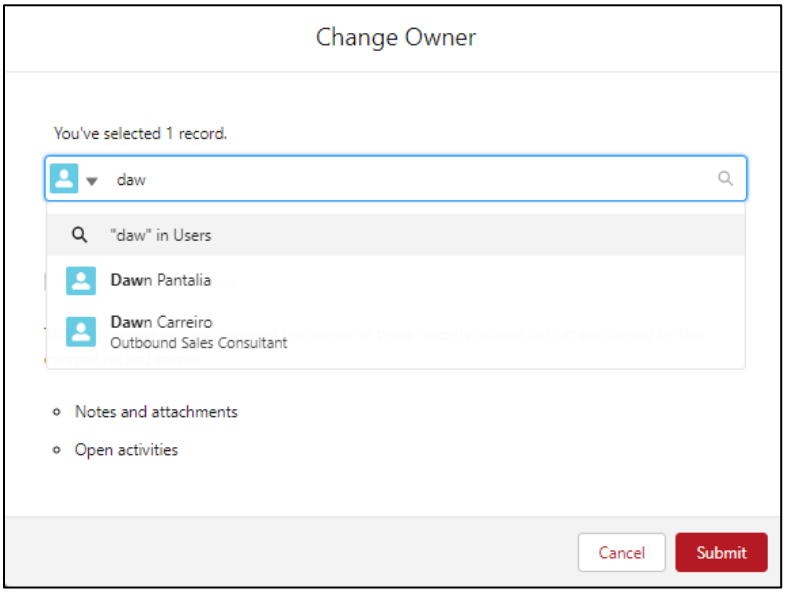




3. On the Change Owner screen, there are **two options**. Ownership can change to a User or a Queue. Pick the option you need from the drop-down menu.



4. Begin to type the **name of the User or the Queue**. Salesforce will display names fitting the search criteria. Pick the correct person or queue name from the list. Click Submit.
   Note: Do not click the send notification email box.

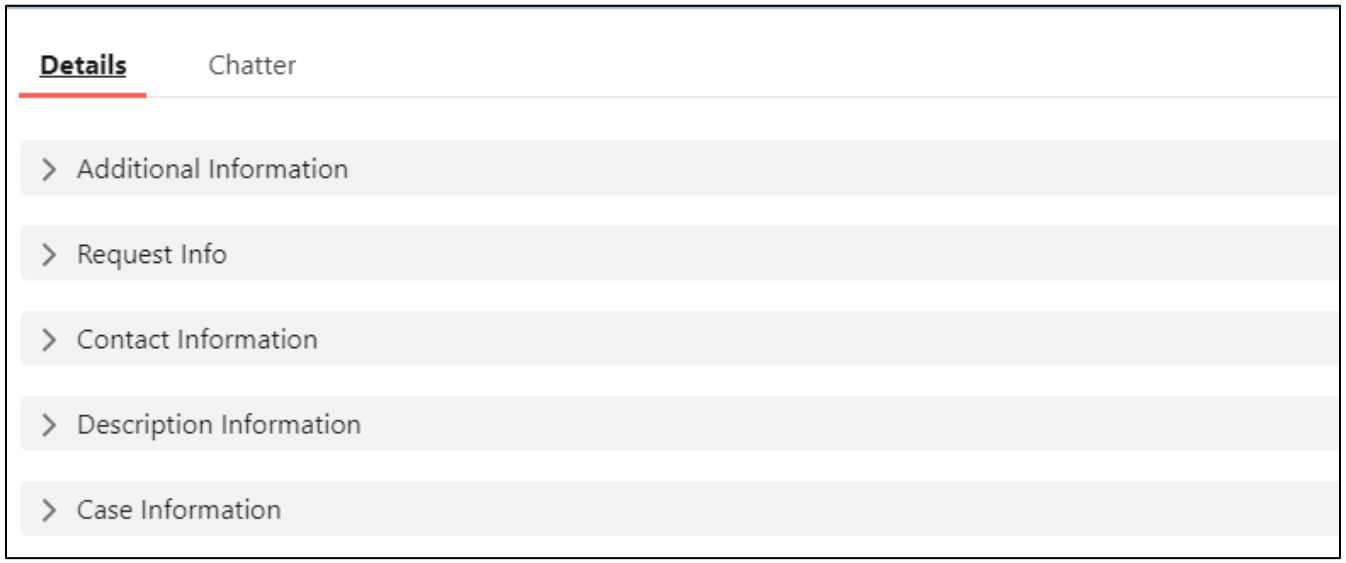


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Working the Case

There are several sections on the **Details** section of a case. Access the appropriate sections of the Child Case for the issue you are working. To **make updates**, click the **pencil icon** next to the field you want to update. Reference your internal department processes and workflows for detailed instructions.

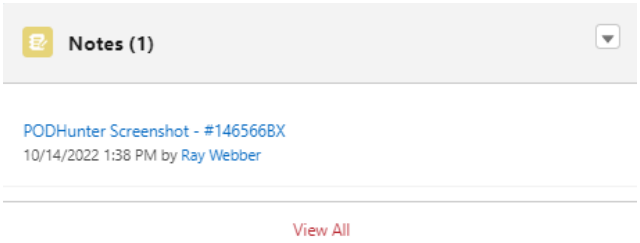
Note: You must be the Owner of a Case to work it, updating notes and changing the status.



1. Review the **'Additional Information'** and **Description Information'** sections for details on what is needed.
2. The **'Request Info'** and **'Contact Information'** sections contain information that was created in the original Internal Request process.
3. FOR CERTAIN CASE TYPES: The **'Container Info'** and **'Address Info'** sections may also be listed.
4. Review the **'Case Information'** section. This is where the case Status will be changed:
    a. New: A Case has been created and needs to be worked.
    b. In Process: Case is being worked to resolution.
    c. Date Change Needed: Customer requests a different date.
    d. Waiting for Additional Information: Case needs to be updated with additional details before it can be resolved.
    e. Case assigned to wrong market/department: Lets the ART team know to assign the Case to the correct Queue.
    f. Resolved: Follow the instructions in the next section for resolving a Case.
5. FOR OFFBOOKS: Choose the action taken in the **'Action Taken'** field:
    a. Move completed
    b. Unable to complete move
    c. Reschedule
6. Enter additional information in the **'Action Taken Notes'** field. Hit Save.

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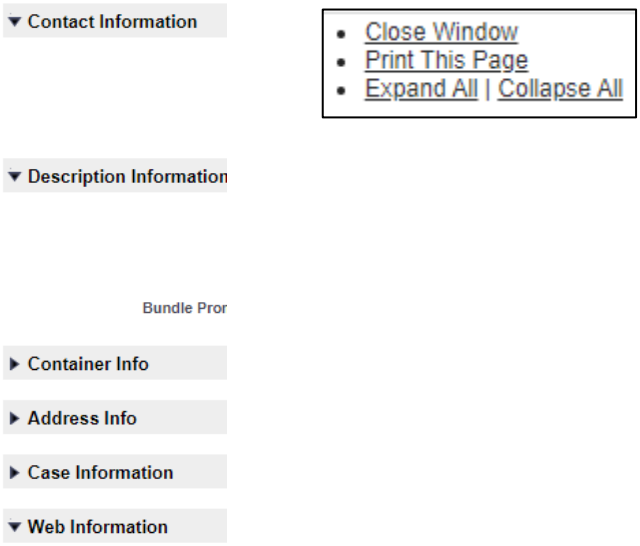
Note: Screenshots can be added to Cases in the Notes section of the Case.



7. To print the Case information, click the dropdown next to Clone and choose **Printable View**.



8. Once on the printable page, you can **collapse and expand sections** as needed by clicking the chevron next to the section name. Click the **Print This Page link** in top right corner. You can print directly to a printer or save as a PDF to be emailed/shared.

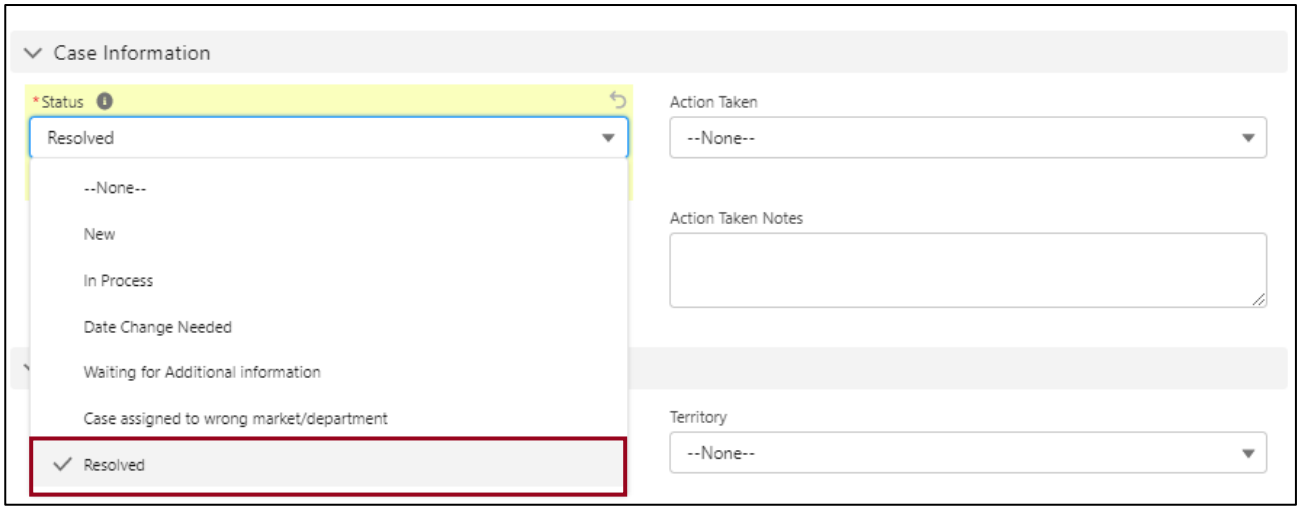


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Status Resolved – When done working a case, change the status to Resolved. The way you resolve a case depends on whether it's a Child Case or a Parent Case.

Child Case

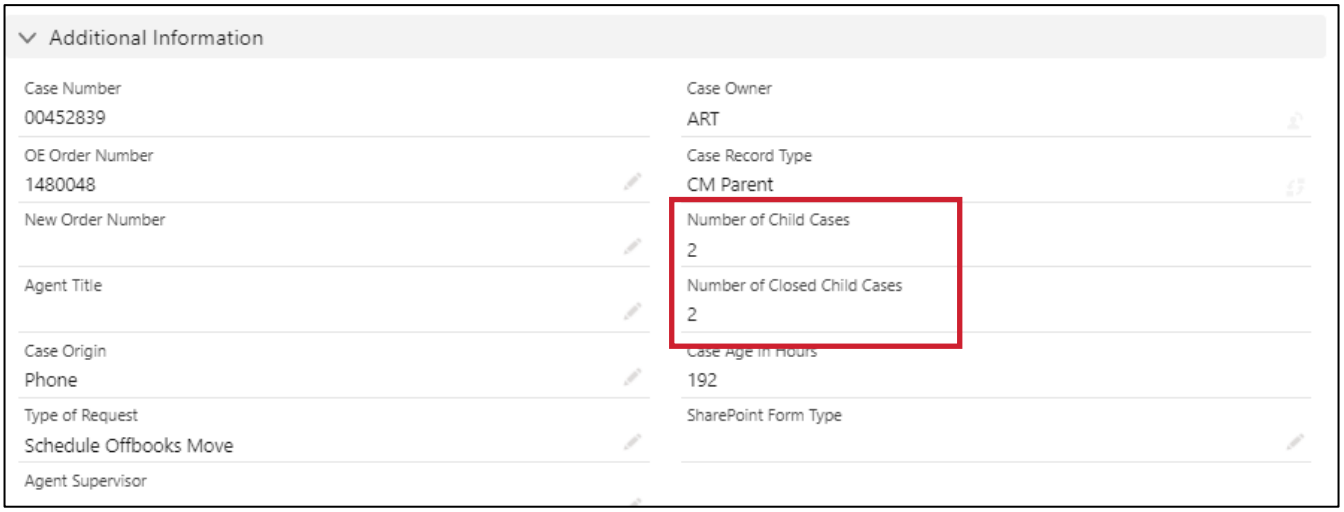
To close a Child Case, change the **Status field to Resolved** under the Case Information section. Hit Save.



Parent Case

To close a Parent Case, verify that all Child Cases have been closed. In the **Additional Information section** on the Parent Case, compare the **'Number of Child Cases' field against the 'Number of Closed Child Cases'** field.

1. If the Number of Closed Child Cases equals the Number of Child Cases, the Parent Case can be closed. Go to the Status field under the Case Information section and change the Status field to Resolved.



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2. If Number of Closed Child Cases is less than the Number of Child Cases, all Child Cases must be resolved and closed before the Parent Case can be closed. Once Number of Closed Child Cases equals Number of Child Cases, the Status can be changed to Resolved.

