Salesforce – Basic Navigation User Guide

This user guide covers basic Salesforce Case Management navigation processes for PODS. The Salesforce platform tracks customer information in one central location allowing a more seamless process to service customer orders.

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Commonly Used Salesforce Terminology

These common terms are used throughout Salesforce and all reference guides

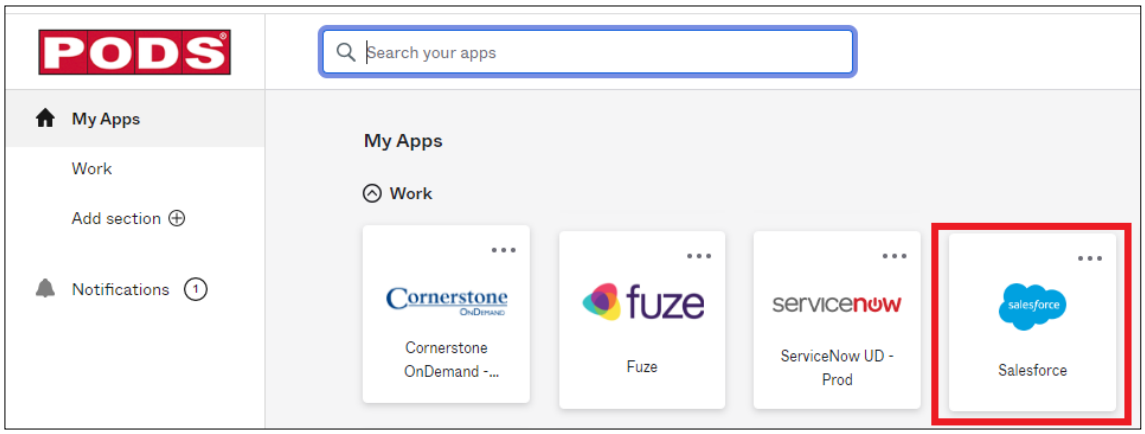
- ***Account*** *- An organization, company, or consumer that you want to track—for PODS' purposes a customer is an account.*
- ***App Launcher*** *- The App Launcher is how users switch between apps. It displays tiles that link to available Salesforce areas, connected (third-party), and on-premises apps.*
- ***Case -*** *Detailed description of a unit of work in Salesforce (i.e. a customer's problem or question). Also referred to as a* ***Parent Case*** *which is at the top of the case hierarchy*
  - ***Child Case/Subcase –*** *Detailed description of an issue and its resolution related to a Parent Case. Parent Cases may have multiple related Child Cases.*
- ***Chatter –*** *A social collaboration tool like Facebook and Twitter, but on the Salesforce.com platform. Chatter allows users to collaborate, share files and status updates.*
- ***Dashboard*** *– A snapshot view of report results from Salesforce.*
- ***Global Search –*** *Salesforce's search capability that allows you to search all objects.*
- ***Object –*** *An object allows you to store information in your Salesforce organization like a tab on a spreadsheet.*
- ***Owner –*** *Individual User or Queue to which a record is assigned.*
- ***Queue/Case List –*** *A holding area/list of all cases assigned to a workgroup before they are processed. Cases can be assigned from one Queue to another or from a Queue to individual Users to be worked.*
- ***Record –*** *A single instance of a Salesforce object like a row of a spreadsheet.*
- ***Record Type –*** *Selected from a picklist, it is used to identify records for sorting and information flow.*
- ***Task –*** *An action that has been or will be performed against a record in Salesforce.*

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Accessing Salesforce

Access Salesforce from your pods.okta.com User Home Page. Salesforce is a single sign on (SSO) application

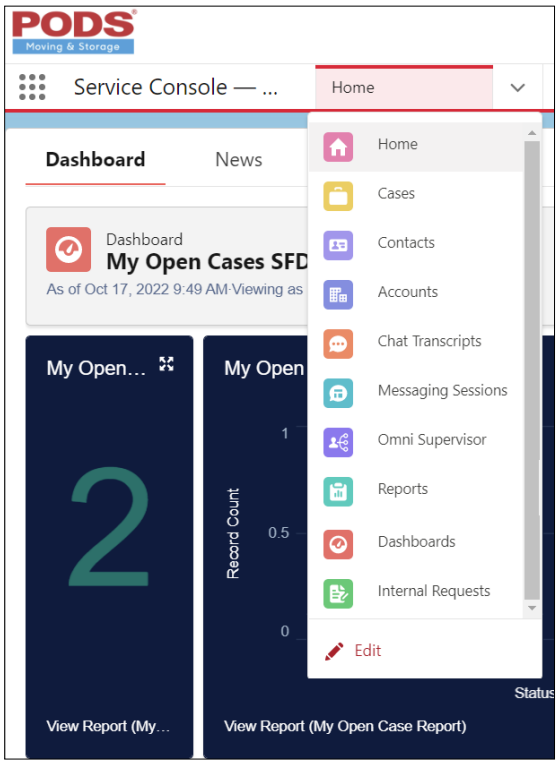
- From the PODS.okta.com dashboard **click** the **Salesforce tile** to open Salesforce



Applications & Tabs

The tabs at the top of the screen are how you navigate through the Salesforce applications.

- Use the **dropdown menu** next to any tab to select and open the available tabs
- The below information covers the most commonly used tab



*Tip: Customize the order of your tabs by using the **Edit** button on the tab dropdown menu. This opens a dialogue box where you can rearrange the order your tabs are displayed by dragging and dropping tabs from the displayed list.*

Service Console-PODS Enterprises, LLC

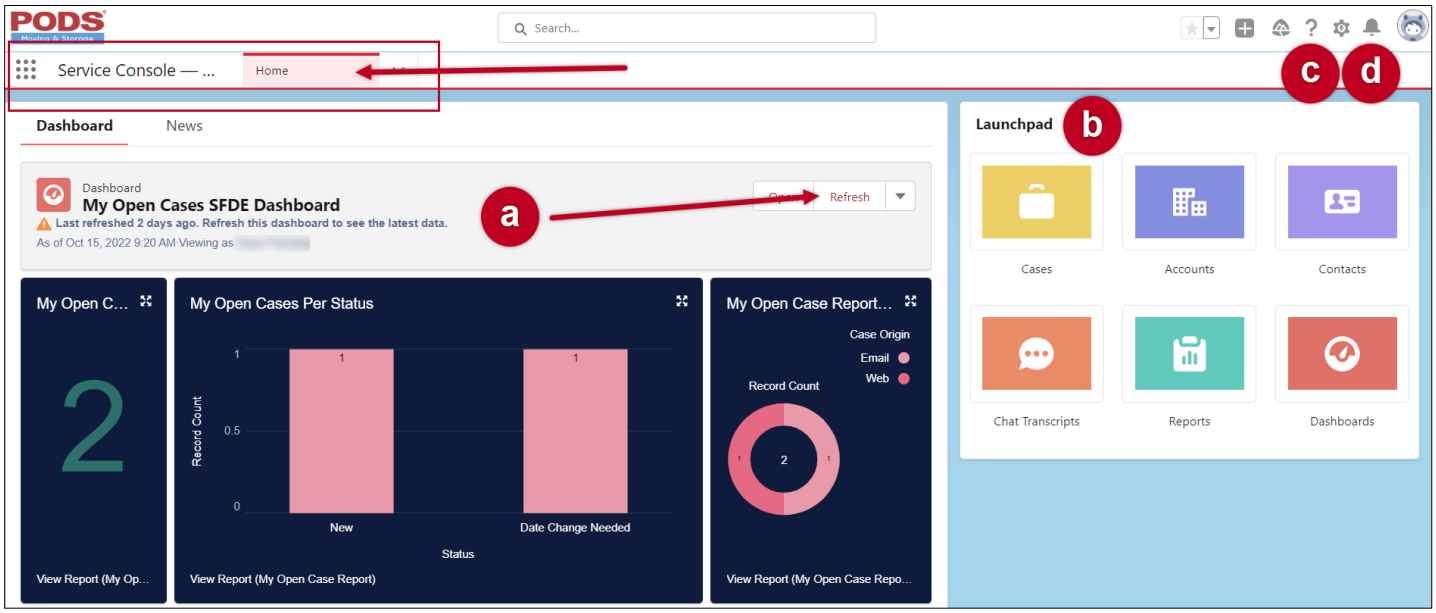
Service Console – PODS Enterprises, LLC is the main application PODS will be using within the Salesforce platform and is where all customer information and cases are accessed.

Important: *Be sure you are in the correct application by checking the words **Service Console** appear in the top left corner of the page.*
*If not, click the icon and select **Service Console** from the dropdown.*

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Home Tab

Initial sign on will open to the **Service Console Home Page tab** where you will be able access the following:



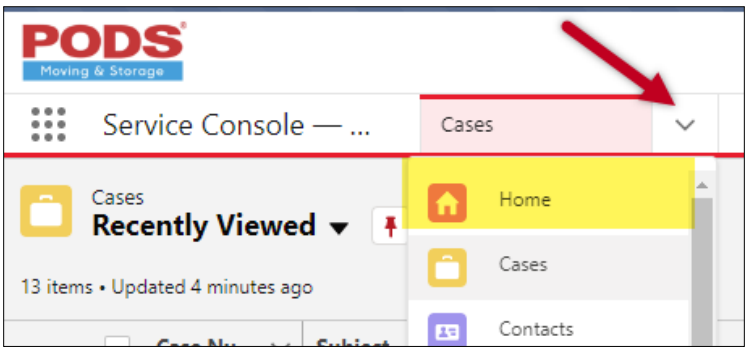
a. **Dashboard –** Overview of your **Open Cases, Case Status**, how the case was opened (**Channel**), and **Your High Priority Cases**.
   - **Click** the **View link** at the bottom of the blue report box to open a report tab.
   - **Click** the **Refresh button** to update your Dashboard information.

b. **Launchpad** – Quick access to commonly used **objects (tabs).**
   - **Click** a tile to open the tab.

c. **Help** – Standard Salesforce Help & Training articles to assist with understanding Salesforce functions.
   - **Click** the **question mark icon** to open the Help dropdown menu

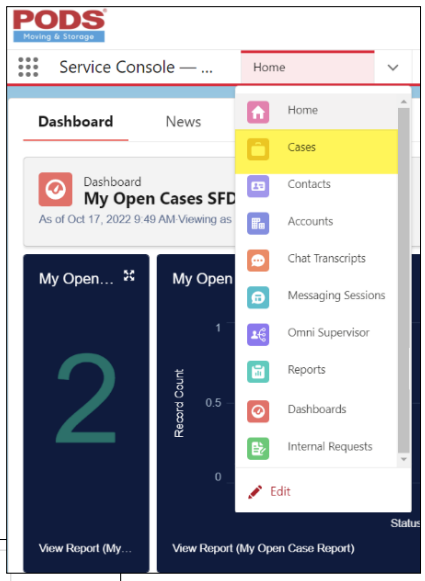
d. **Notifications** – Alerts to various activities such as Chatter posts, tasks assigned to you, approval requests, etc.
   - **Click** the **Notifications icon** to be taken directly to the related alerts

__Tip:__ After initial sign on, Salesforce remembers the last page displayed before log out. As a result, Salesforce will reopen the platform to the last page displayed when signing back on.
Use the __dropdown__ menu to return to the __Home Page__.



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Cases Tab



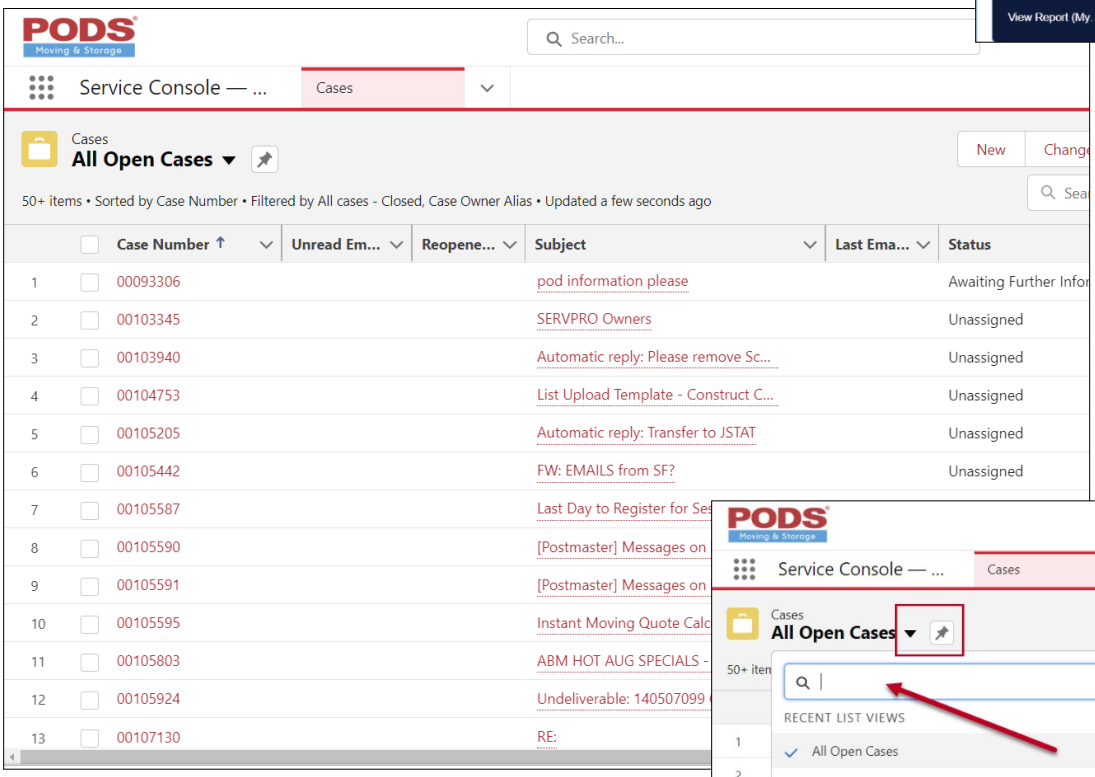
- In the **Service Console**, **click** the **dropdown** tab menu and **select Cases** to open the **Cases Tab**

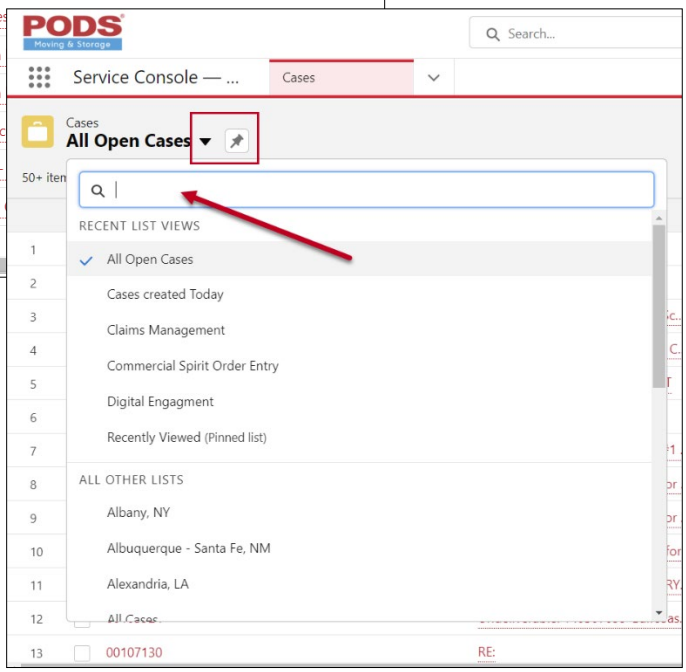
The **Cases Tab** is where you can view, search, and sort lists of existing cases organized by

- All Open Cases
- Cases created Today
- Recently Viewed
- Location
- Workgroup
- Other customer groupings

Search and Access Cases

From the case view





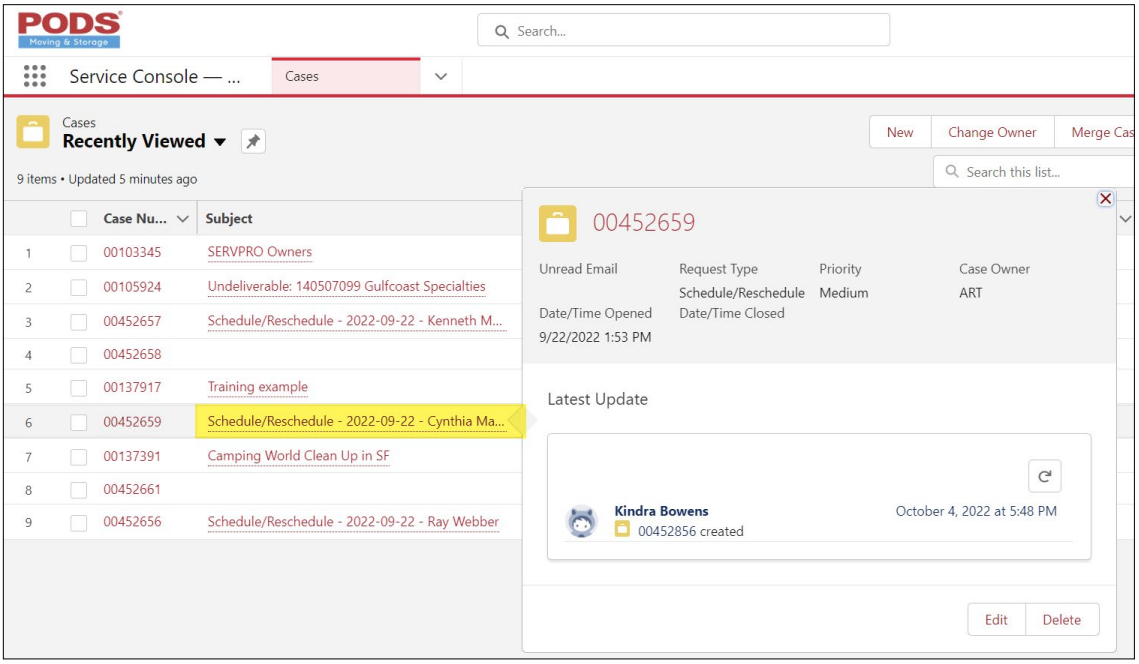
1. **Click** the **dropdown arrow** next to the case view
2. **Select** the **group or location** from the **dropdown menu** to view a list of cases in the group/location's queue or, use the **Search Bar** to search by group name

__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.

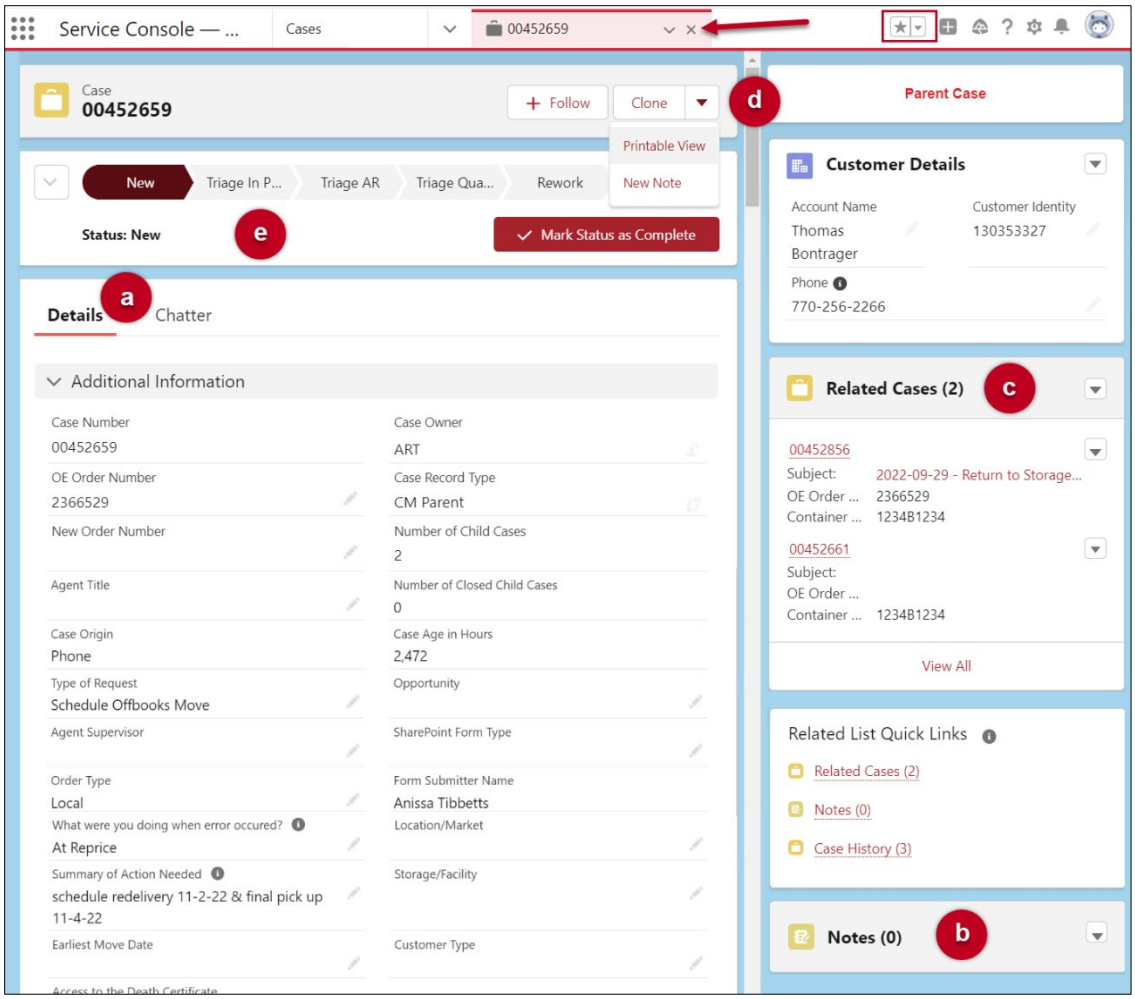
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Case Tab Continued

3. **Hover over** any of the **underlined links** on a case record for a pop-out quick view of the case information and latest updates.



4. **Click** any of the **underlined links** on a case record to open the **Case Page** in a separate tab From the Case Page you will be able to access the following:
   a. Case **Details** and **Chatter** (messaging history)
   b. **Notes –** View and add
   c. **Related Cases**
   d. A **Printable View** of basic case information
   e. The **Status** and progress of the case





Tip: *Save objects (cases), contacts, queues to your favorites when you are viewing them by clicking the* ***star icon*** *in the upper right tool bar.*

Click the ***dropdown arrow*** *to view all items in your*

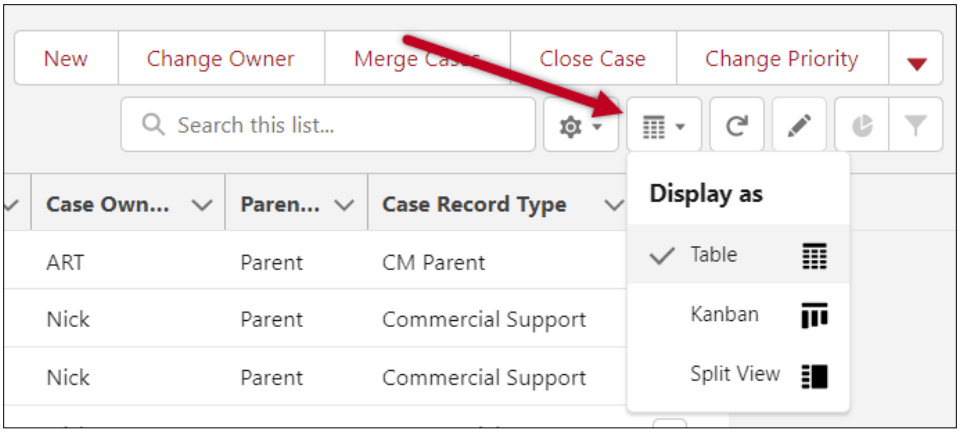
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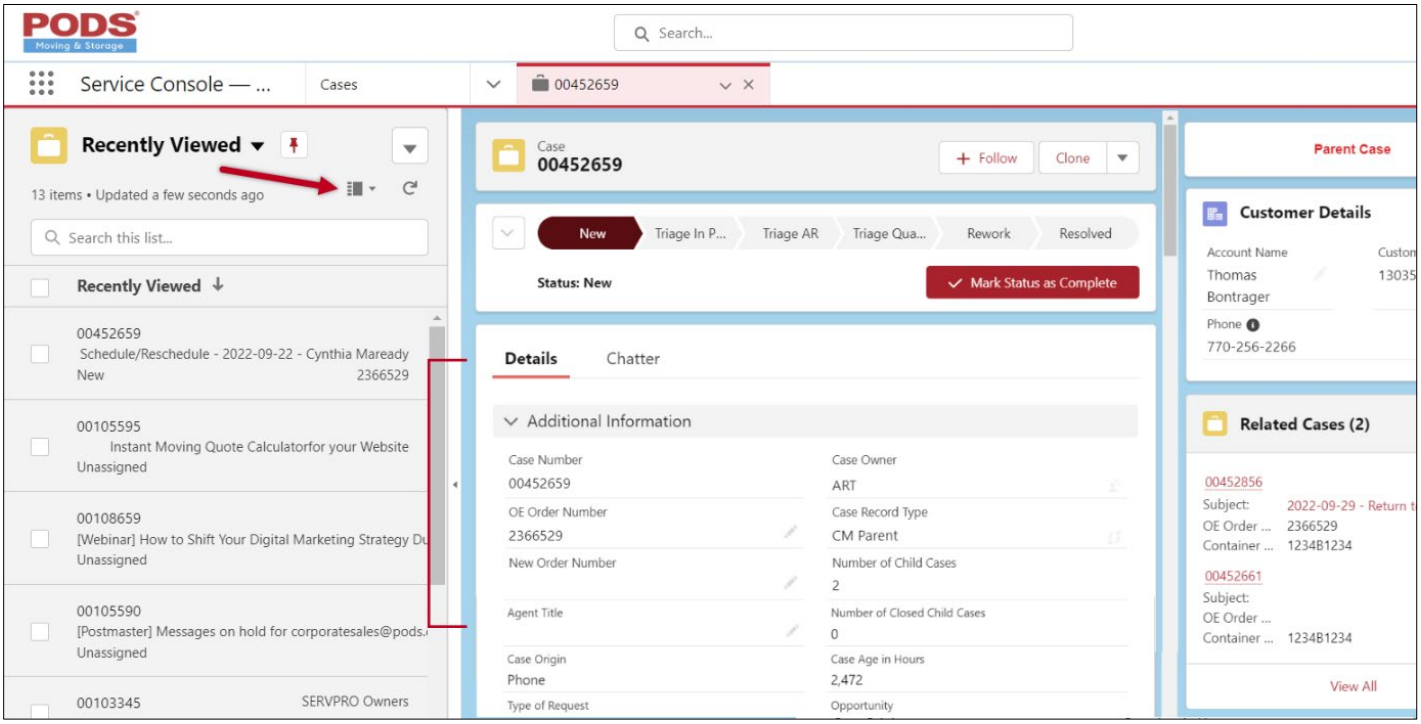
Change Case Page View

Salesforce allows side-by-side viewing of **Case Lists** and the **Case Page** to eliminate the need to toggle between the two views.

From the Case List

1. **Click** the **Display as** icon to open the dropdown menu
2. **Select** the **Split View** option
3. **Click** the left arrow next to the **Case List** to collapse
4. **Click** the **Display as** icon in the **Case List** to reset the view



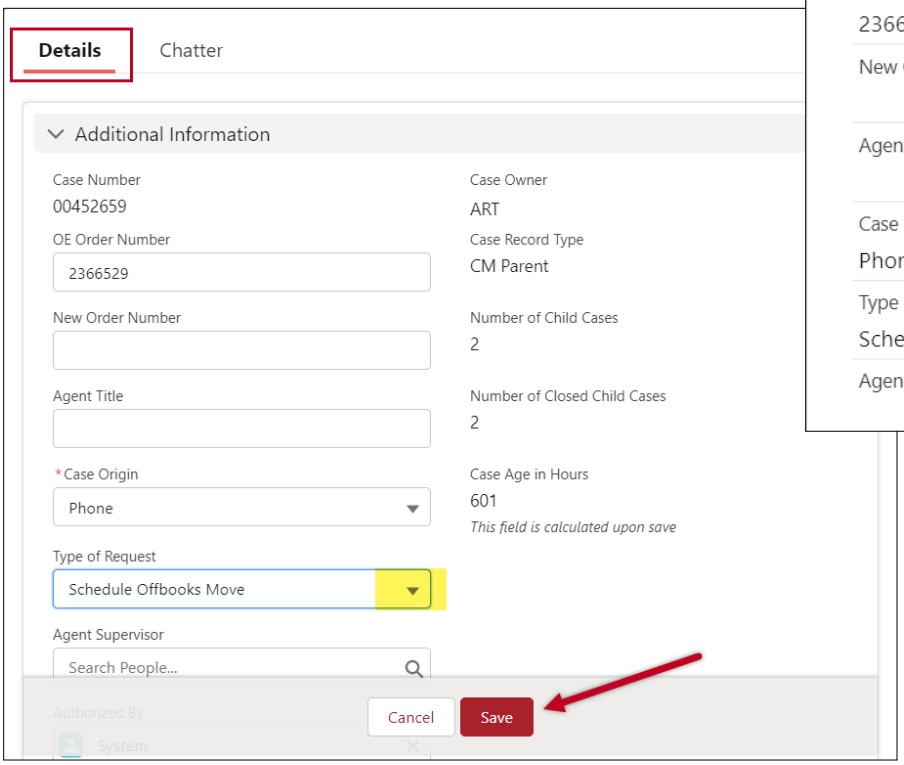


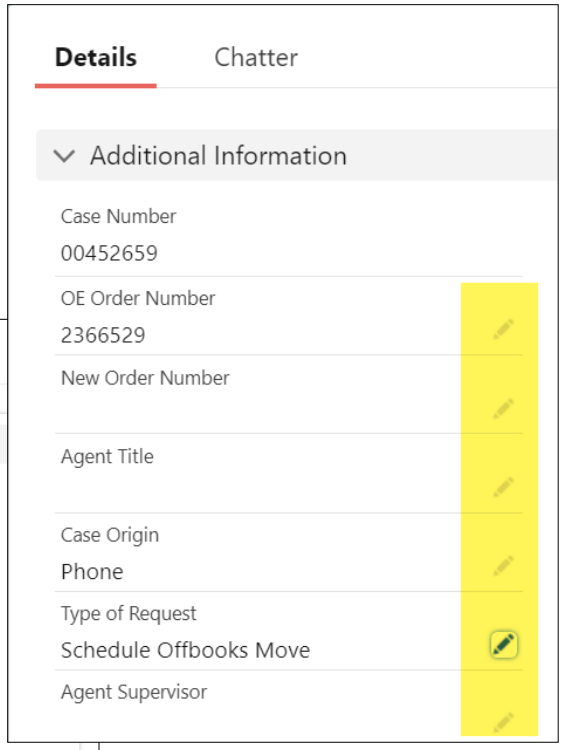
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Edit/Update Case Details

From the **Case Page** you can make updates and complete case tasks

1. **Click** the **pencil icon** next to a field in the **Details** section of the case record
2. **Input** the edits/updates in the appropriate fields in the **Details** section. (Scroll to view all open fields)
3. **Click** the **Save** button to save any edits/updates



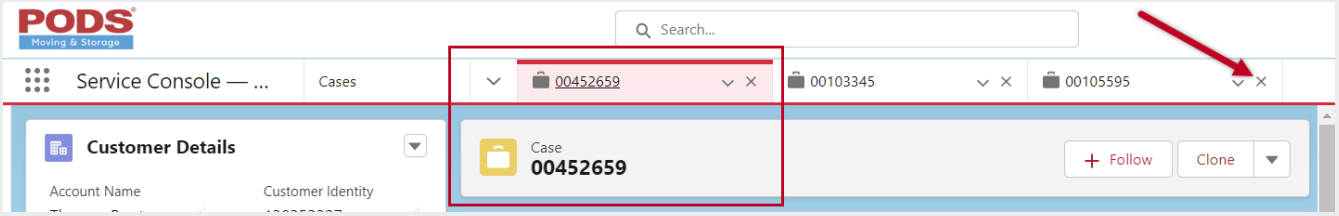


***Tip:** Fields with the **arrow icon** will display **picklists** for entry selection.*

Important:

Ensure you are making updates to the correct case. Always check the case number highlighted matches the case number on the Case Page displayed.

Avoid mistakes by maintaining good tab hygiene. Close unnecessary tabs immediately.

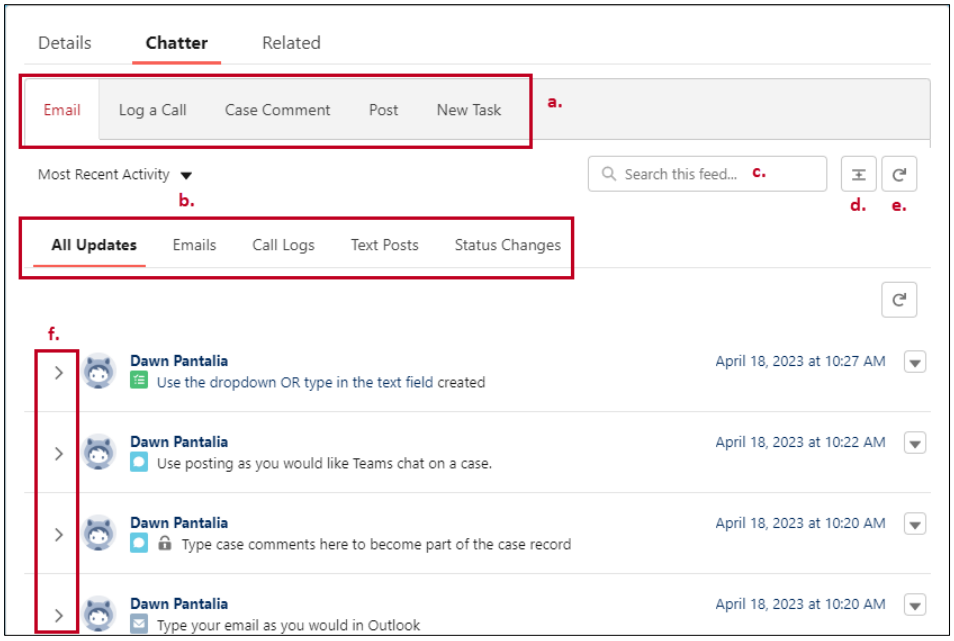


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Messaging, Emails, Calls, and Tasks
From the **Chatter** section you can

a. **Add** communications to a case using **email, call logs, case comments, posts, and tasks**

Note: Communications added to Child Cases will appear on the Parent Case Chatter feed



b. **Review** and filter the **Most Recent Activity** on a case

c. **Search** for **Chatter** communications on the case

d. **Expand** all visible **Chatter** communications

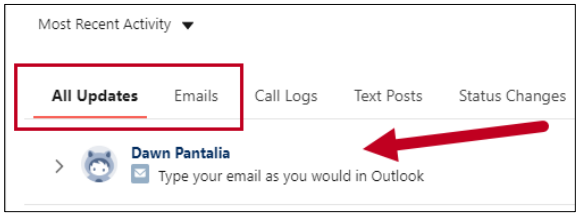
e. **Refresh** to see if any communications have been added

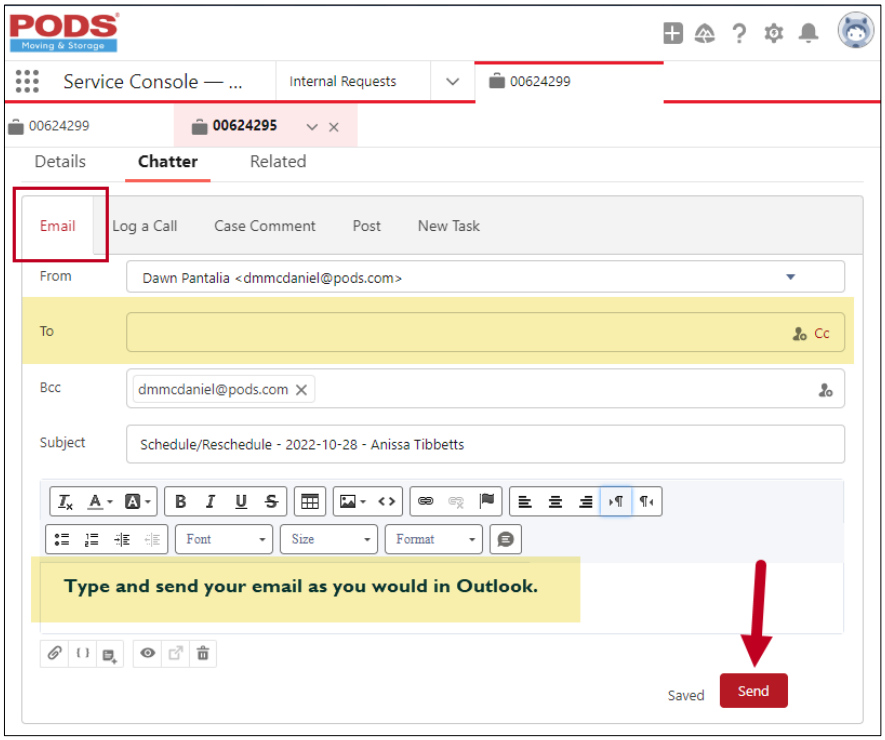
f. **Expand** to view details any of the communications or add comments

*Tip: Best practice is to use **Chatter** functions within a case instead of Outlook or Teams to ensure we have a complete record of all the actions and communications for a case in one location.*

Email – Use the **Email tab** to

- **Compose and send emails** as you would in Outlook
- **Add** a copy of the **email** automatically to the case as part of the permanent record
- **View email** from the **All Updates or Emails tabs** under the **Most Recent Activity**

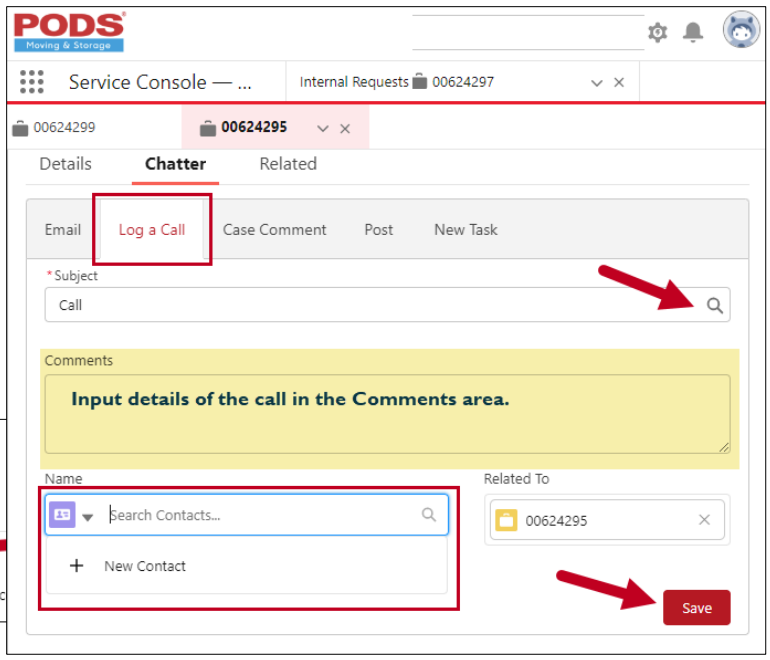


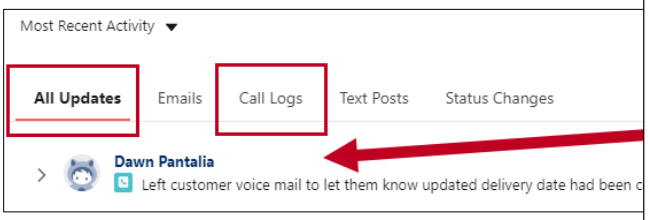


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Log a Call – Use the **Log a Call tab** to

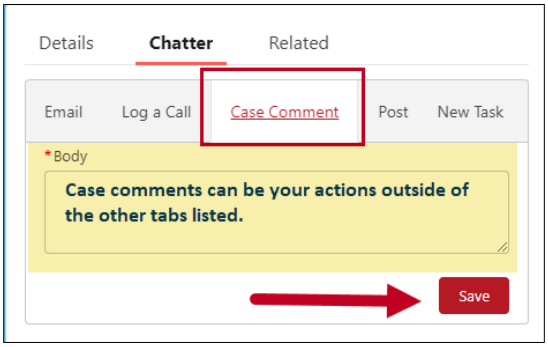
- **Record** incoming and outgoing **calls** on a case
- **Search or Input** a subject type for your call
- **Add** detailed **comments** from phone conversations about the case
- **Add Contact** information
- **Save** the call record to the case
- **View calls** from the **All Updates or Call Logs tabs** under the **Most Recent Activity**





Case Comments – Use the **Case Comments tab** to

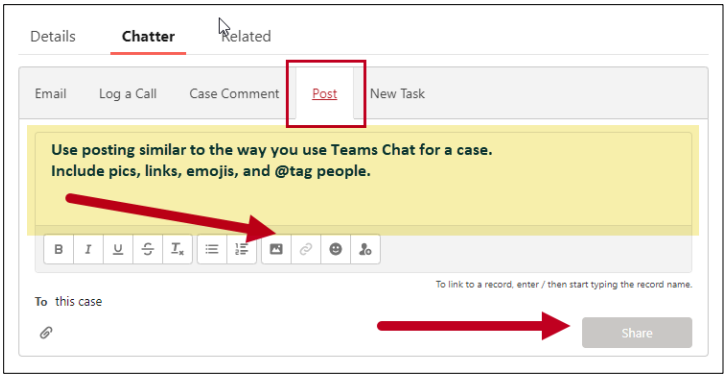
- **Add comments** to the case to show your actions that may not be reflected with any of the other tab options
- **View case comments** from the **All Updates tab** under the **Most Recent Activity**

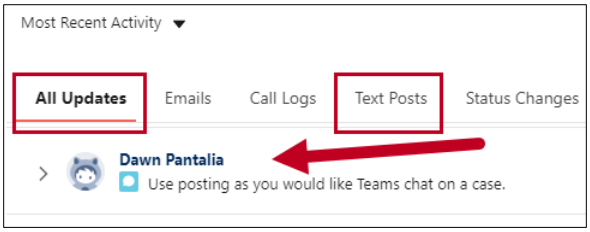




Post – Use the post tab to

- **Share** updates to Salesforce users on a case, like using Teams Chat
- **Include** pictures, links, emojis, @tag people similar to texts
- **View posts** from the **All Updates or Text Posts tabs** under the **Most Recent Activity**



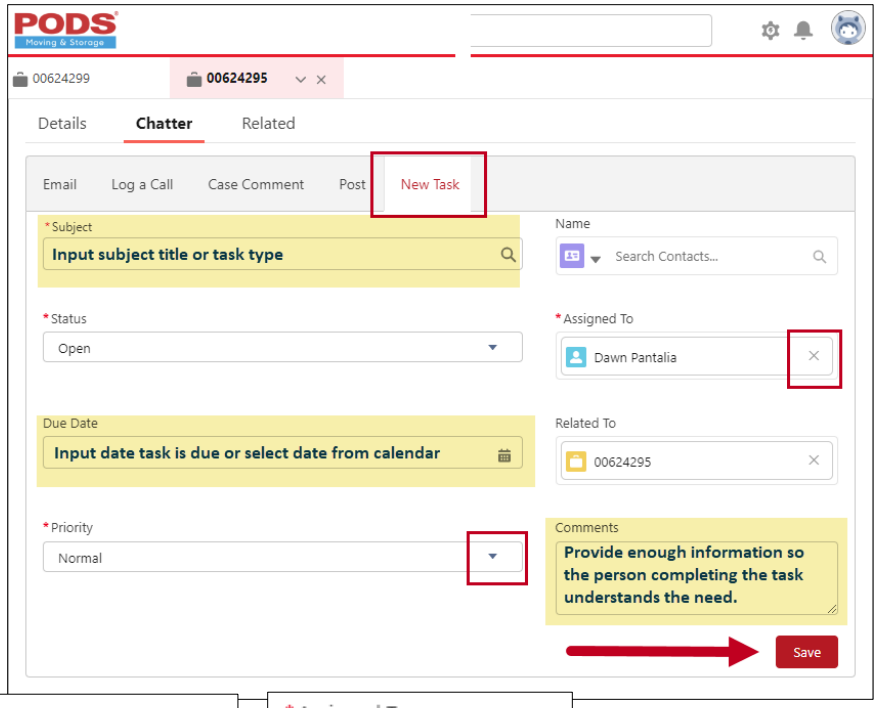


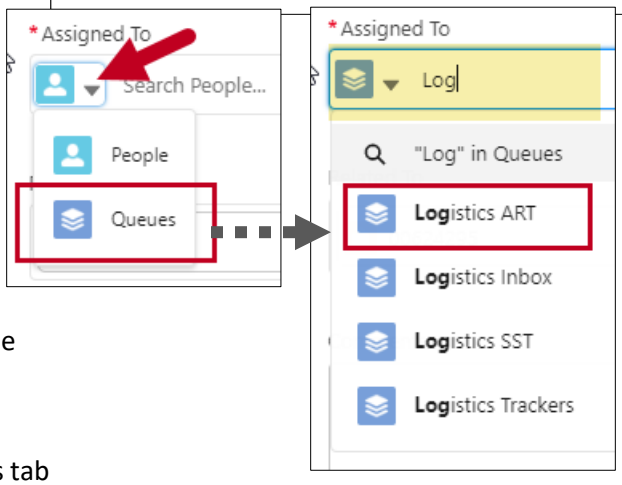
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Tasks – Use the **New Task** tab to create and assign actions to a queue.

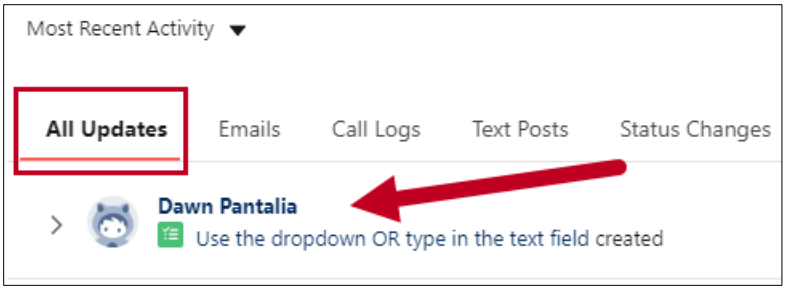
- **Create and Assign a New Task**

1. From the **New Task tab** in **Chatter**, search for the task subject or input the subject/title of the task in the text field (i.e. Additional information needed)
2. **Status** field will default to open and **should not be changed** if assigning a task
3. **Input** the **Due Date** of when you need the task completed
4. **Select** the **Priority** of the task to reflect the urgency (Normal or High)
5. **Update** the **Assigned To** field to the appropriate queue
   a. **Click** the **X** to clear the default name (defaults to the person creating the task)
   b. **Click** the **dropdown arrow** next to the icon and **select Queues**
   c. **Begin typing** the **name of the queue** for assignment and **select** from the dropdown list
6. **Input** detailed information about the needed task in the **Comments** field
7. **Click Save** to assign the task





The task will display on the All Updates tab in the Most Recent Activity section of chatter and be added to the assigned queue

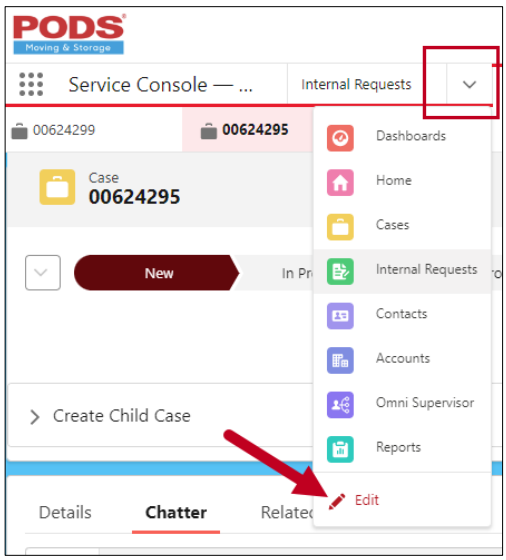


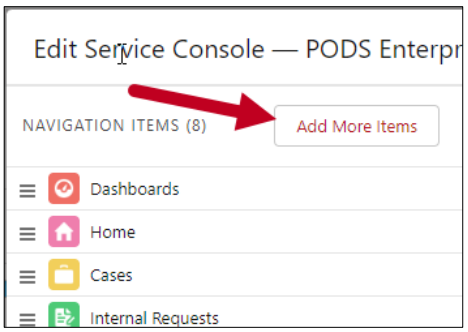
***Tip:** Best practice is to assign tasks to a queue vs. an individual. This will allow anyone monitoring the queue to review and complete the assigned task as necessary.*

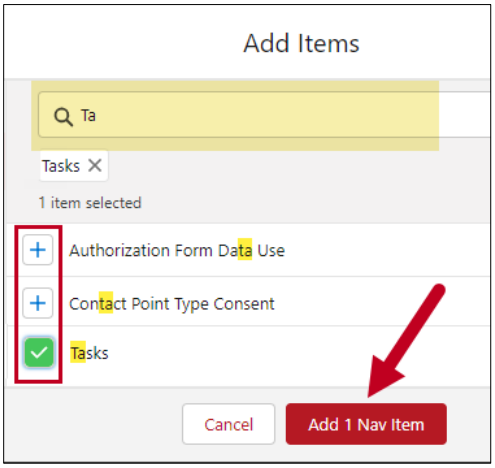
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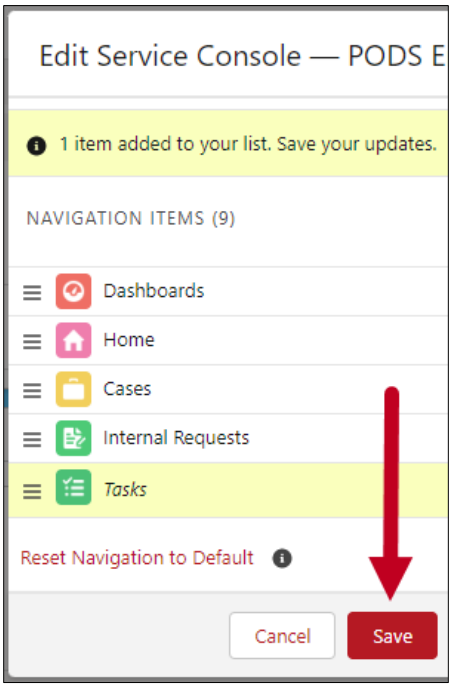
- **Viewing Tasks in a Queue –** In order to view a **Task Queue**, you will need to add the **Tasks** navigation item to your **Service Console**

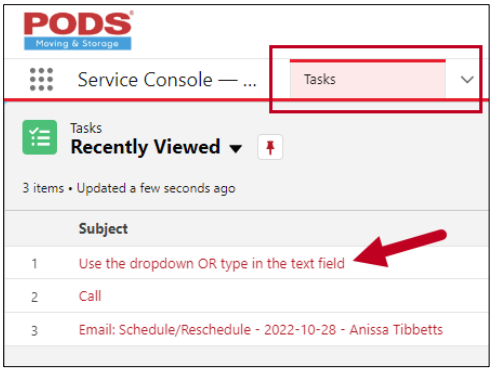
1. From the **Service Console** **click** the **dropdown** arrow to view your list of navigation items
2. **Click Edit** at the bottom of the list to open the **Edit Service Console** pop-up
3. **Click Add More Items** to open the **Add Items** screen
4. **Use** the **scroll bar** or **begin typing** the **item name** to search for the item
5. **Click** the **+** next to the item(s) to be added and **click Add Item** button
6. **Click** the **Save** button at the bottom of the **Edit Service Console** pop-up to add your item
7. **Navigate** to the **Tasks** queue in your **Service Console** menu and **click** the **Subject** link to open and view the task details

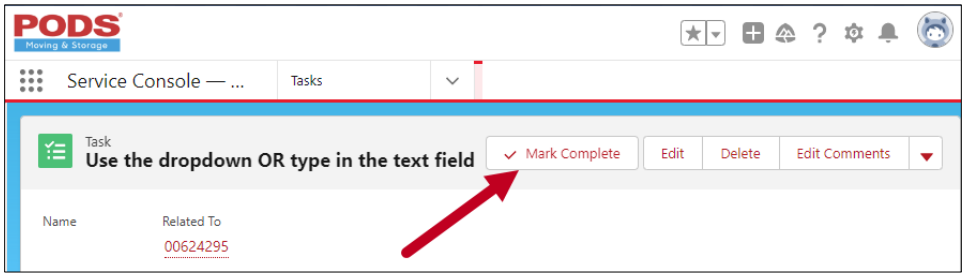












> ***Tip:*** *Drag and drop navigation items on the Edit Service Console pop-up to re-order how the items display in your Service Console dropdown menu*

- **Mark a Task Complete –** Once the activities of a task have been fulfilled, the person Assigned To the task will need to mark the task Complete by clicking the Mark Complete button on the opened task

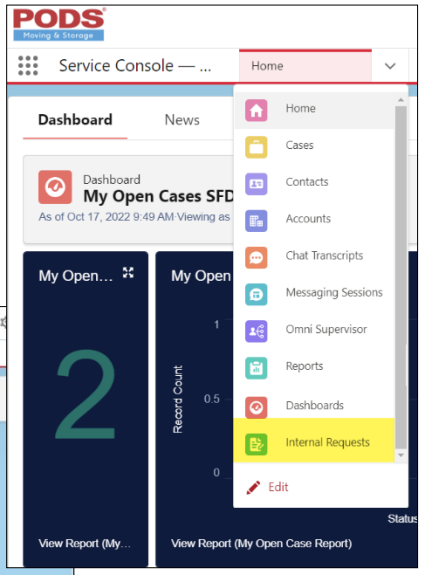
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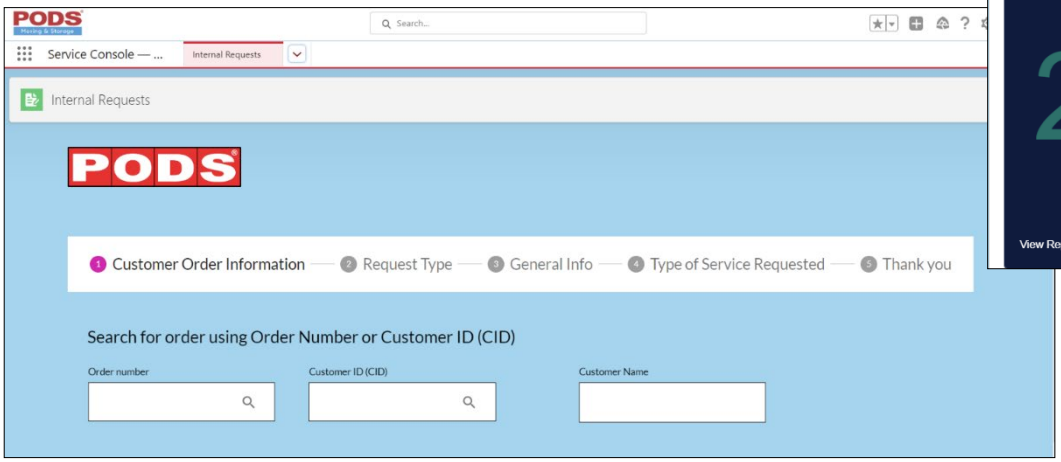
Internal Requests Tab

- In the **Service Console**, **click** the **dropdown** tab menu and **select Internal Requests** to open the **Internal Requests tab**

The **Internal Requests tab** is where you will open **cases** in Salesforce.

- Search by Order Number or Customer ID (CID)
- Refer to the **Creating and Working a Case Quick Reference Guide** for details on completing Internal Requests





Reports Tab

- In the **Service Console**, **click** the **dropdown** tab menu and **Reports** to open the **Reports tab**

The **Reports tab** provides the ability to view all available reports and create custom reports.
The default view when accessing the **Reports tab** is to display a list of all recently viewed reports.

- View reports by **clicking on a Report Name** in the display list
- Use the menu on the left side to view different report lists
- Create custom reports by clicking on the **New Report button** at the top of the list

