Case Management Process

Login to Salesforce:

1. In a web browser, go to salesforce.butler.edu
2. Enter your Butler email address and password
3. Click “Login”

Contact Search:

1. Use the Omni search box (top of console)
2. Narrow areas using the drop-down list
3. Select the “Contact Card” indicated with the purple icon

Create or Reopen case:

1. Click “Related” on the Contact Card
2. Review related cases for previous cases
3. If none found, click the “New” button on the Contact Card
4. Complete the form
5. Submit

“Tagging” a Resource:

1. In the “Post” feed view, click “Share an update”
2. Type the @ symbol
3. Start typing the name of the resource
4. Select the resource
5. Type message
6. Click “Share”
7. Resource will get an email with your message

Change Owner (assign a case to a resource):

1. In “Feed” view, click the “Change Owner” button at the top
2. Click the drop-down arrow and choose People or Queue.
    a. People: type the name of the resource, select form list
    b. Queue: type the group name (IT Help Desk), select from list
3. Click “Submit”

Email Contact:

1. In “Feed View” click the “Email” tab
2. Compose the email using the formatting toolbar OR
3. Use an email template by clicking the “Paper” icon under the email body field
4. Include attachments, if desired, by clicking the “paperclip” icon
5. Click “Send”

Create Email Templates:

1. Click the “Cube” icon in the top left corner
2. Click “Email Templates”
3. Name the template
4. Select the folder to save the template in
5. Enter a Subject
6. Enter a Description
7. Use the body field to compose message
8. If desired, click the “brackets” icon to insert fields which will customize the generic template
9. Save the template