

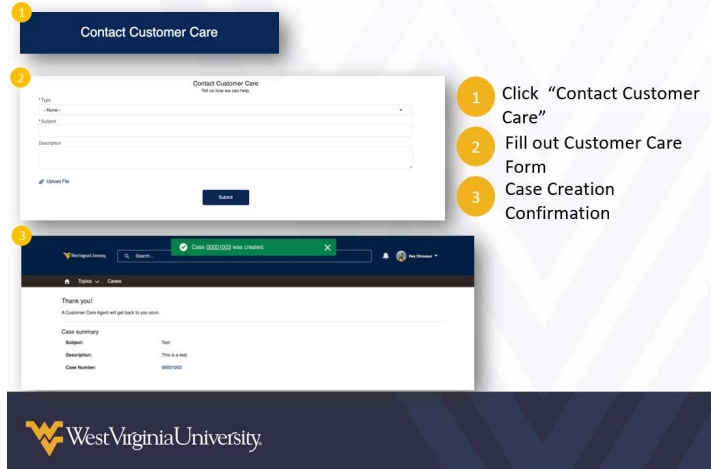
SALESFORCE COMMUNITY QUICK REFERENCE GUIDE

Creating a Case


Creating a Case

- Clicking on Contact Customer Care will bring up the case creation form. You can upload supporting documentation to the form to better explain your case.
- Upon submission of the form, the case will be assigned to a customer care agent who will respond within 4 hours.
- The Customer Care agent will work with you to get any additional information to solve your case, or route it to the best team to help.

Creating a Case



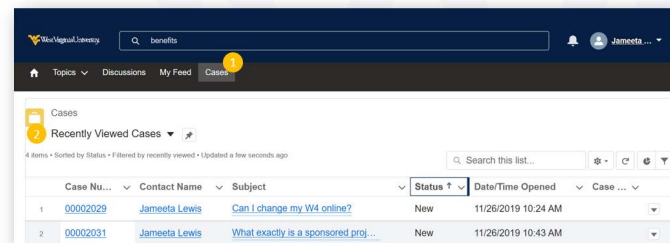
- 1 Click "Contact Customer Care"
- 2 Fill out Customer Care Form
- 3 Case Creation Confirmation

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Case Layout Views

- Selecting My Cases will bring up all of your cases.
- Recently Viewed Cases will be the default view.

Case Layout – List Views



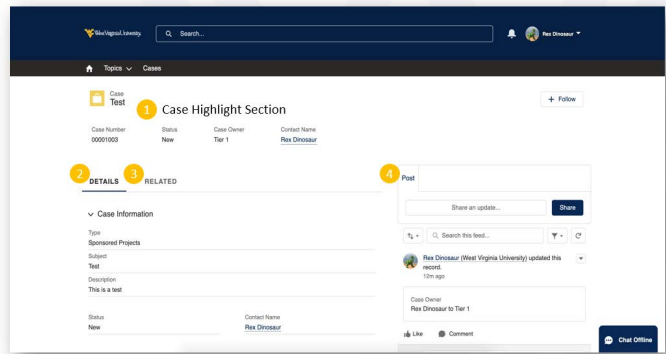
Case Nu...	Contact Name	Subject	Status	Date/Time Opened	Case ...
1	Jameeta Lewis	Can I change my W4 online?	New	11/26/2019 10:24 AM	
2	Jameeta Lewis	What exactly is a sponsored proj...	New	11/26/2019 10:43 AM	

- 1 Click Cases in the navigation bar
 - 2 By default, your most recently viewed cases will appear
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Cases Layout Detail

1. **Case Highlight Section-** This displays the case number, status, case owner, and contact name.
2. **Case Details-** : Includes the values in the highlights section as well as the type and description.
3. **Related-** Includes records related to the case: attachments, case history.
4. **Case Feed-** The main portal for communication with the Case owner and also shows updates throughout the life of the case.

Case Layout – Detail



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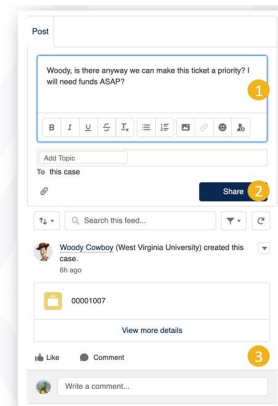
Case Feed

1. The text pane is a rich text pane which allows the user to format the post, embed links, add an emoticon, and @mention other users.
 - a. A topic can also be created from the post to tag the post with a common community topic
 - b. A file can also be attached to the post via the paper clip icon
2. Posting within the case is private to users with access to the case (excluding community). However, posting on public discussion boards is visible to anyone with access to the community.

Case Feed

The case feed gives a method to communicate with the agents working on your case.

- 1 Click into the text pane to write a post – similar to sending a private message on social media
- 2 Click "Share"
- 3 Users can also Like and/or Comment on posts or updates within the feed



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