Salesforce (ADvantage) Job Aid for Tech Support

Search Dealer Accounts

Search for either:
- Dealer phone number: 2062267676 (set drop down to Search All)
- Account: Excellence Motors
- WebId: motp-excellence

Make sure:
1. Search drop down is set to "Search All"
2. "Limit to items I own" is not checked

Add a Contact (KB 5308)

1. Hover over **Contacts** at the Account level
2. View entire list to make sure contact does not exist
3. Click **New Contact** button
4. Add First Name, Last Name, and Email Address
5. Select Contact's role at the Dealership
6. Use **Title** if they have a unique title or position
7. **Save**
8. Use Account hyperlink to get back to the account page (do not use top Account tab)

Troubleshooting Notes

Troubleshooting notes go in the **Case Comments** section. To add a case comment hover over the **Case Comments** link, and click "**New**."

Case notes should always be separated into sections: **Problem**, **Troubleshooting, Resolution,** and **Action Plan**. Not all four need to be in a single note, but every comment should be classified, and a final case should have all four types listed. In addition, at the end of each customer contact, an action plan should be defined and noted, including what steps were taken, what action proved successful, and what was communicated to the dealer afterwards.

Create A Case

1. Search **Account** (use search bar)
2. Select **Account** & look for Critical Notes
3. Confirm **Contact** and **email**
4. Add Contact if Necessary
5. Select Correct **WebID**
6. Check for Open Case
7. Edit existing Case or Open a **New Case**
8. Select the **Tier 1** Case Record Type
9. Fill out **Contact**, **Topic**, **Description** and **Case Stats**
10. **Save**
11. Give caller the Case Number, whether closed or not

Escalate Case to ETS (KB 4966)

1. Change Case Record Type to **Tier 2-ETS**
2. Select the correct **Priority** under **Case Stats**
3. Fill out **Escalation Support** section in Case
4. If **Product Category** is **Inventory** or **Domains**, fill out the respective sections (the fields will be required.)
5. **Save**
6. Make sure 911 Priority is cleared with Mgr
7. Call the Queue if you send a 911 or escalated issue

Using Salesforce's note fields

Salesforce has many different fields to choose from when placing notes. We've listed out the types of notes you'd put in each field as well as some basic background about how each field works.

Topic:

This field is customer facing in emails we send out after a case is closed (called customer satisfaction indicators—CSIs) and should accurately succinctly summarize the customer's question. It should be detailed enough that the customer can easily recognize this request as the one they called in. This field can be edited as you gain greater understanding of the dealer's issue. You will be asked to review it at Case closure.

Case Description:

This field should house a short overall description of the case, including what the customer experiences when the problem occurs. As this field can be modified, it should not be used to document steps taken to help a customer, but be used as a more complete description of what is in the subject. As this field is editable even after the case is closed, it is not a good place for permanent records of troubleshooting activities or conversations.

Case Comments:

This area is the primary place to make detailed notations in a case. Troubleshooting, resolution, and virtually every other note should be placed in this field, including logging your contacts with a customer. It's important to include the details on each attempt to resolve the issue. This is traditionally a locked down field and notes placed here cannot be erased.

Escalate Case to Content (KB 5208)

1. Change Case Record Type to **Tier 2-Content**
2. Select the correct **Priority** under **Case Stats**
3. Fill out **Content** section in Case
4. **Save**

Work from the Queue

1. Click on **Cases** Tab
2. Change drop down to the **Tier I Queue**
3. Sort cases by **creation date** so that oldest are at top of list
4. Place a **checkmark** in the first **Case**
5. Click the **Accept** button (top of page)
6. Use your **Recent Cases** to open the case. It should be the first one in the list.

Keep track of Cases

1. Click on **Cases** Tab
2. Views you should watch:
   - My Open Cases
   - Cases Where I'm on the Case Team
   - Your assigned Queues
3. Look up by case number if returning caller knows it