SALESFORCE SUPPORT MODULE
USER OPERATING GUIDE

Contents

What is a Salesforce Support Module?

*Use the **Salesforce Support Module** to track emails, calls, and other customer interactions.*

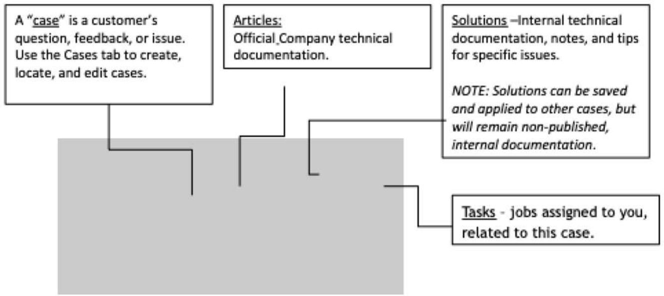

Figure 1-Menu Overview

Open Salesforce

Select the Salesforce icon on your desktop.
Enter your login ID and password.

Figure 2

In the main menu (see Figure 2), navigate to the search field and type *support*.
Select *Support*.

⚠️	Contact your supervisor if the *Support* option is not available

Create a New Case

When you get a call from a customer about a new issue, you will create a "case" and enter details about the customer's issue.

Figure 3

Select Cases > New (see Figure 3).

Figure 4 - New Case – Top of Screen

The New Case screen appears (see Figure 4).

- Account Name – property name
- Contact Name – (is the caller’s name already in the database? If not, add the caller’s name.)
- Status – *New*

⚠️	The customer and the secondary contact will get an email every time the status changes.

- Secondary Email and Phone – optional (anyone at customer site or Company, who has asked to get updates on the case)
- Due Date - optional
- Category – select one or more categories, then click the right facing arrow to move your choices to the **Chosen** box.

Category	Explanation
User did not attend training	Training - any level of training material Company offers (e.g. self-paced online modules, documents forwarded via Company relevant to the task, to face-to-face training provided by a certified resource)
Complex Functionality	Can be defined by the customer or the technician at the time on case inception
Existing problem	Would be evidenced by a previous case of the same type and may require merge function be completed
Instructions not clear	Can be defined by any type instructional material Company offers to included but not limited to, self-paced online modules, documents forwarded via Company relevant to the task, to face to face training provided by a certified resource.

- Priority – select one of the following:

Category	Explanation
None	No known or established priority. Could require input or management input to set priority
Low	As defined by support group working policies
Medium	As defined by support group working policies
High	- Site is at 100% capacity and is unable to rent a single room up to and including all rooms based on reported issue. - Site is experiencing a site wide outage or problem that prevents the site from controlling all its units. - Installer Company rep onsite - Case history indicates site is reporting the same issue for a second time after initial case was closed “Resolved”

- Channel - How did the customer contact Company Support? Select one of the following:

Phone
Email
Text
Web
Slack
Facebook
Twitter

Figure 5 - Lower Section, New Case Screen

Description Information Section (see Figure 5)

- Subject – title of subject in a few words
- Description – detailed explanation of the issue as communicated by the customer
- Internal Comments –

System Information Section

☐ Send Notification to email contact – check this box to turn on email generation to the addresses listed as “contact” and “secondary contact” as listed in the case header.

Save screen.

Update an Existing Case

You can update a case in one of four ways. You can:

- ✔ Write an email
- ✔ Follow up on a task
- ✔ Add a case comment
- ✔ Close a case

Figure 6 - Cases Menu

When making any of these updates, click the **<u>Cases</u>** menu. All open cases appear in the list (see Figure 6).

Figure 7 - Select an Open Case

Select the appropriate case number (Figure 7).

Figure 8

Navigate to the **Feed** tab (Figure 8).

Write an Email

	Contact the customer via email whenever possible; email is our preferred customer communication tool.

Click the Email tab (Figure 8).

Figure 9 - Email Tab Shows Running List of Emails Related to Case

Click Write an email (Figure 9).

Figure 10

From: Select a Company Support email address (companysupport@ , helpdesk@, support@, testsupport@.)

	Do not use your Company email address in the **From:** field.

Complete these fields:

- ✔ To -
- ✔ Subject -
- ✔ Message -

Click **Send.**

-End of Sample-