

# Salesforce - Case Screen

The screenshot shows the Salesforce interface for a case. At the top, there's a search bar and navigation icons. Below that, the case details for 'John Testcase' are visible, including contact information and a 'Customer Question' box. A 'Cases' table lists the current case. A 'Case Feed' shows the case's history. Action buttons like 'Add Notes', 'Close case', and 'Email' are present. A 'Call Flow' bar at the bottom indicates the current step in the process.

**1** Customer Details

**2** Cases - lists current and previous cases for the customer. Click case # to open and view notes from previous agent.

**3** Case Feed - Lists all activities performed on a specific case: Emails, Agent Notes, SmartLook Session and other valuable information. Select individual case # to view each case feed.

**4** Customer Question - customer's primary question plus any additional details provided by the customer.

**5** Documentation Buttons: used to document and close a case:  
**Add Notes** - used to add case notes to document the customer issue.  
**Close Case** - used to close the case, only if customer's issue is resolve.  
**Categorize all cases as:**  
*US-Product Support > US-Product Functionality > Log-in*  
**Email** - used to send a recap email to the customer.

**Call Flow**

- Greeting
- Open Case/ Documentation
- Problem Identification
- Solution Options
- Problem Resolution
- Closing
- Close Case

# Salesforce - Contact Screen

**1** **Primary Search Bar** - Use when case doesn't automatically load.  
Search by *Case number, Email, Phone Number* or *Contact Name*.

**2** **Secondary Search** - When contact isn't found with Primary Search Bar, search here to locate customer through E-Store purchase.

**3** **Lookup Results**

Action	FirstName	LastName	Zip/Postal Code	Telephone	Email	Username	Turbotax Advantage	Last Modified Date
<a href="#">Lookup</a>	Lisa	Anthony	92126	858-246	lisa_anthony@intuit.com	lah	<input type="checkbox"/>	2016-03-02T14:11:14.340-08:00

**4** **New Contact Profile** - If contact isn't found with Primary or Secondary Search, create a new contact by clicking and entering (1) first name, (2) last name, (3) email and (4) phone number.

**5** **Tools Button** - opens the Tools Menu where you will find links needed to confirm customer ID and assist with Log-in issues.

**Secondary Search Results** - Results listed if the customer has made purchases from the E-Store for e-filing or a CD/download.  
- **Result Found** - confirm contact information and click **Lookup**.  
- **No results** - create a **New Contact Profile (Step 4)**.

**Tools - Google Chrome**  
https://intuit.my.salesforce.com/ui/col

- 1. Top Tools
- 2. Screensharing
- 3. All Tools
  - The Agent Portal **for Login Widget**
  - Agent Diagnostic
  - Agent Knowledge Base
  - AnswerXchange
  - Business Objects **to search AuthID, etc.**
  - CSR (Username Search/Password Reset)
  - Defect Submission Form
  - EFE **to confirm customer info**
  - Experian **Experian Login Page to verify customer identity**
  - How to Shar
  - Liveloop Scr
  - Privacy Tool
  - Product Verification
  - Quickbase
  - SmartLock CoBrowse (Keep Alive)
  - TTO Service Code
  - TTO Sign In **opens Sign-in Browser**
  - Turbotax Refu

SOS Omni-Channel Tools