SALESFORCE

CREATING CASES, CONTACTS, AND REVIEWING OLD CASES

WHY IS SALESFORCE IMPORTANT?

- Documents interactions with customers
- Allows anyone with a login to see customer cases
- Ability to keep track of all interactions with customers
- Track number of cases we receive (including calls, emails, faxes, etc.)
- And so much more!

IN THIS PRESENTATION:

- How to properly create a case
- Creating and editing contacts
- When not to create a case and how to find existing ones
- Helpful tips

CASES NEED TO BE CREATED FOR **EVERYTHING**

Every phone call.

Every email.

Every fax.

If it is not in Salesforce, it never happened

HOW TO CREATE A NEW CASE:

THERE ARE MANY WAYS TO CREATE A NEW CASE. IT IS IMPORTANT WE REMAIN CONSISTENT, BECAUSE IF WE DON'T, THIS CAN LEAD TO MORE CLUTTER WITHIN THE DATABASE

- WHEN CREATING A CASE, FIND THE CORRECT DEALERSHIP
  - Confirm they are a current customer with support

Account Name	Legal Name	Phone	Account Owner Alias	Type	Support Plan	Billing State/Province (text only)	Billing Country	Billing State/Province
Auto/Mate, Inc.		(518) 371-4331	jjones	Customer	Standard	NY	United States	NY

- PLEASE BEAR IN MIND, PARENT GROUPS WILL SAY "NO SUPPORT" – MAKE SURE TO SELECT THE CORRECT LOCATION, WHICH CAN BE FOUND UNDER "VIEW HIERARCHY"

Type	Customer
Account Name	Dutch Miller Auto Group (parent) [View Hierarchy]

HOW TO CREATE A NEW CASE

- ONCE YOU'VE FOUND THE CORRECT DEALERSHIP, YOU WILL NEED TO LOCATE THE CONTACT WITHIN THE DEALERSHIP IN ORDER TO CREATE A CASE. WE MUST CREATE CASES UNDER THEIR ALREADY EXISTING INFORMATION. IF WE DO NOT, IT WILL CREATE A "BLANK" CONTACT

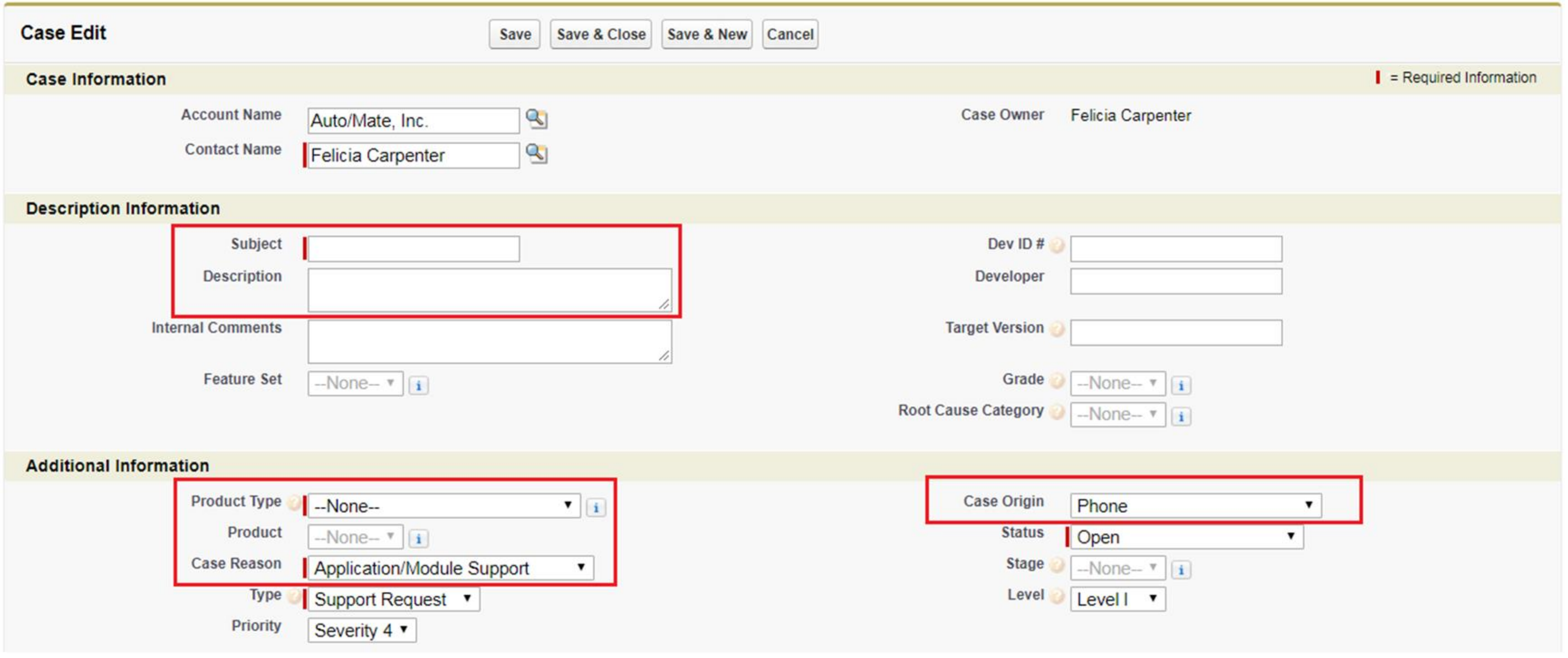
Contacts New Contact Contacts Help ?

Action	Contact Name	Department	Title	Position	Email	Phone	3rd Party Authorizer	Most Recent NPS Score	NPS Date
Edit	Connie Simpson	Accounting		AP/AR	csimpson@dutchmillerauto.com [Gmail]	(304) 529-2301			
Edit	Lisa Maynard	Accounting		Assistant	lmaynard@dutchmillerauto.com [Gmail]	(304) 529-2301 ext. 1111			
Edit	T.J. Henson	Executive	Finance Manager	General Manager	tjhenson@dutchmillerauto.com [Gmail]	(304) 343-7700			
Edit	Tommy Grubbs	Sales	F&I Manager	F&I Manager		(304) 529-2301			
Edit	EJ Mandigo		Former Employee			(304) 529-2301			

Show 5 more » | Go to list (50+) »

- IF YOU DO NOT SEE THEM LISTED, YOU MAY CREATE A NEW CONTACT (IT ALSO HELPS TO ASK THEM IF THEY HAVE CALLED IN BEFORE)

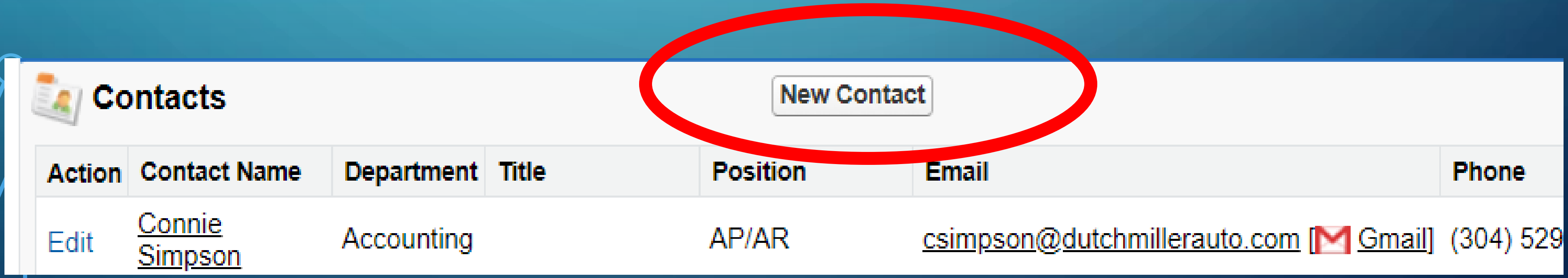
HOW TO CREATE A NEW CASE: FILL OUT THE FOLLOWING FIELDS



HOW TO CREATE A NEW CONTACT:

ONLY IF THEY ARE NOT IN SALESFORCE, OR NOT LISTED AT THE LOCATION THEY ARE CALLING FROM

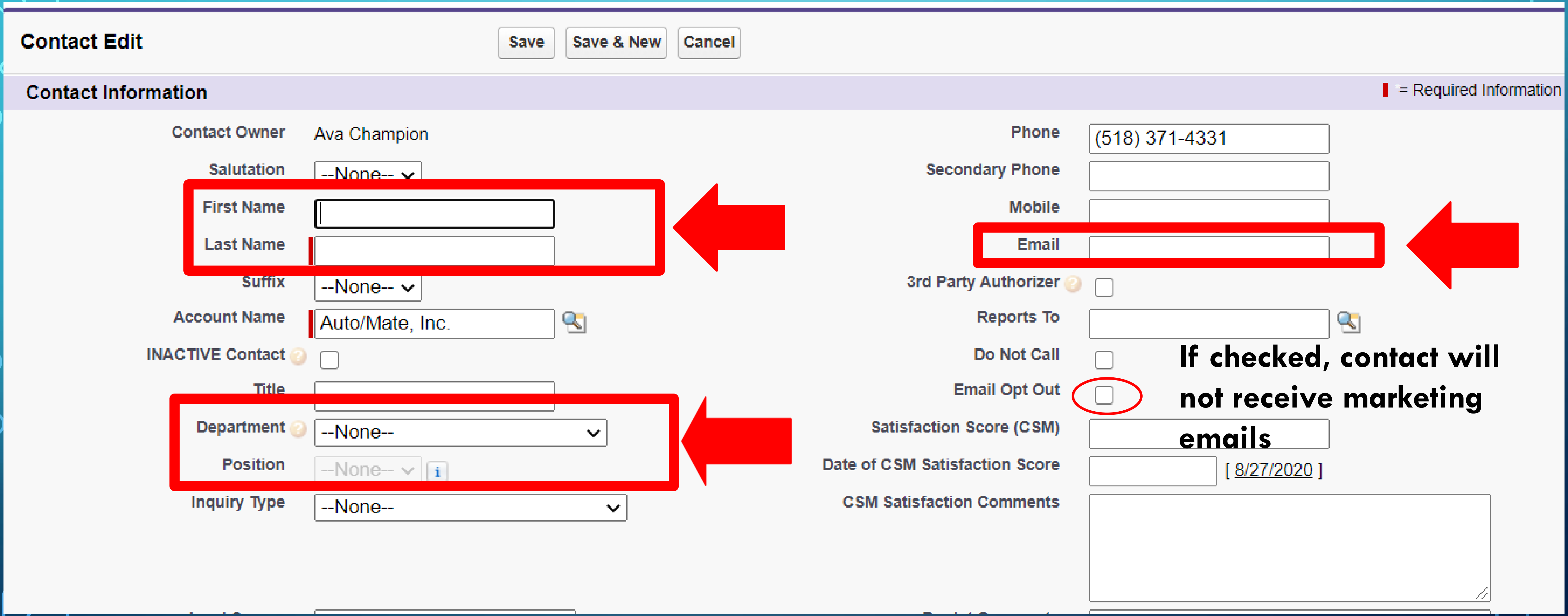
- ONCE YOU HAVE DETERMINED THEY NEED TO BE ADDED TO SALESFORCE, YOU MAY CREATE THEM A NEW CONTACT. MAKE SURE YOU ARE CREATING A NEW CONTACT FOR THE CORRECT LOCATION


Contacts

New Contact

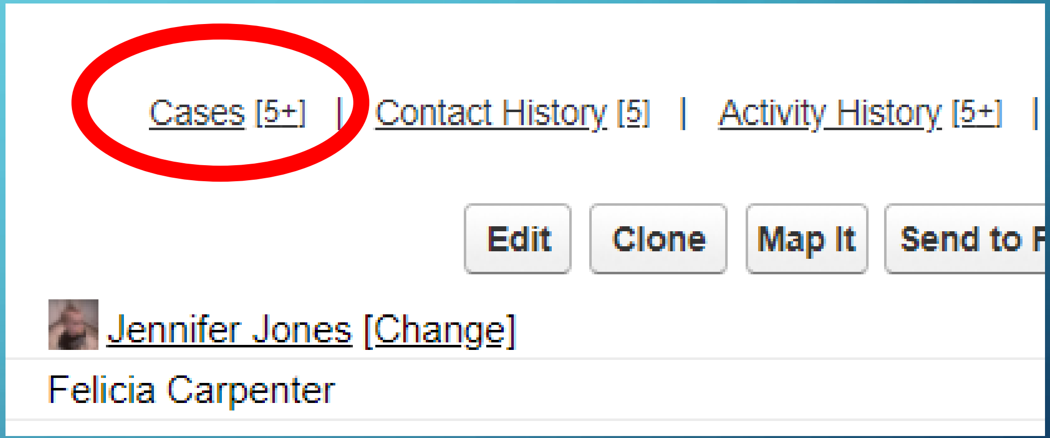
Action	Contact Name	Department	Title	Position	Email	Phone
Edit	Connie Simpson	Accounting		AP/AR	csimpson@dutchmillerauto.com [Gmail]	(304) 529

HOW TO CREATE A NEW CONTACT: FILL OUT THE FOLLOWING FIELDS



WHEN NOT TO CREATE CASES

- If the customer already has a case, you do not need to create one.
  - Give the customer their case number, which can be found either on the dealership's account page or the customer's case history
  - When we transfer the caller, try to get them to the current case owner.
  - If the case owner is on the phone, offer VM or the queue

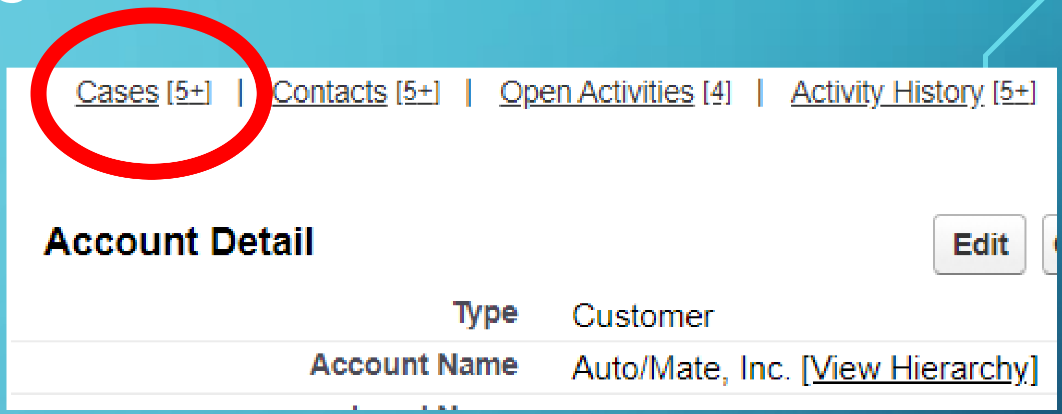


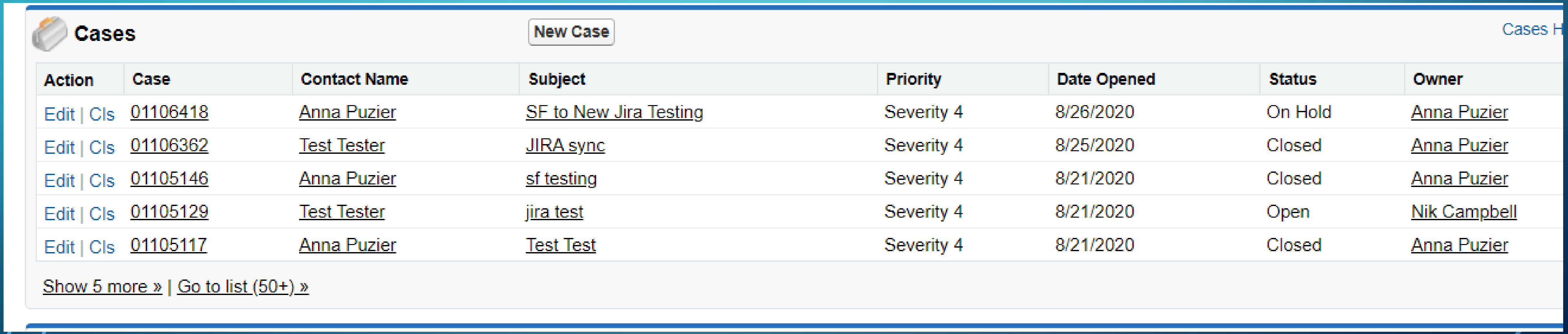
- Sometimes others from the same dealership call in to report the same issue.
  - In this instance, you should check the dealership's cases to see if there is a current case created (IE. Sever down)
  - If there is already a case, let them know who already reported the issue and that we are working with them. Give the caller the case number and end the call. Add a comment to the existing case mentioning who else called.

HOW TO FIND EXISTING CASES

Navigate to the Account or Contact's page…

And simply scroll to the case section





Cases | New Case | Cases H

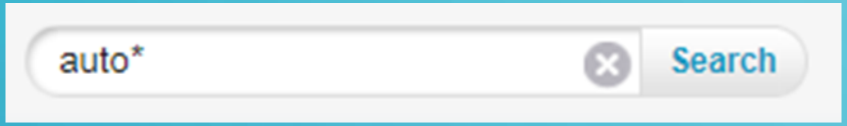
Action	Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
Edit | Cls	01106418	Anna Puzier	SF to New Jira Testing	Severity 4	8/26/2020	On Hold	Anna Puzier
Edit | Cls	01106362	Test Tester	JIRA sync	Severity 4	8/25/2020	Closed	Anna Puzier
Edit | Cls	01105146	Anna Puzier	sf testing	Severity 4	8/21/2020	Closed	Anna Puzier
Edit | Cls	01105129	Test Tester	jira test	Severity 4	8/21/2020	Open	Nik Campbell
Edit | Cls	01105117	Anna Puzier	Test Test	Severity 4	8/21/2020	Closed	Anna Puzier

Show 5 more » | Go to list (50+) »

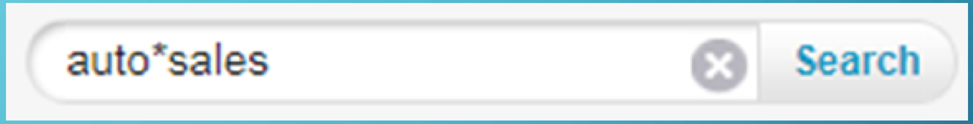
You may also ask the caller if they have a case number

HELPFUL TIPS

- Use the * in search to yield more, or narrow results.



OR



- If you see (SOLD To…) in an account name, do not make a case under this account, unless they are specifically doing something in that wind down company

  - Instead, make a case for the DBA store

THANK YOU FOR ATTENDING!

QUESTIONS?

COMMENTS?