

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

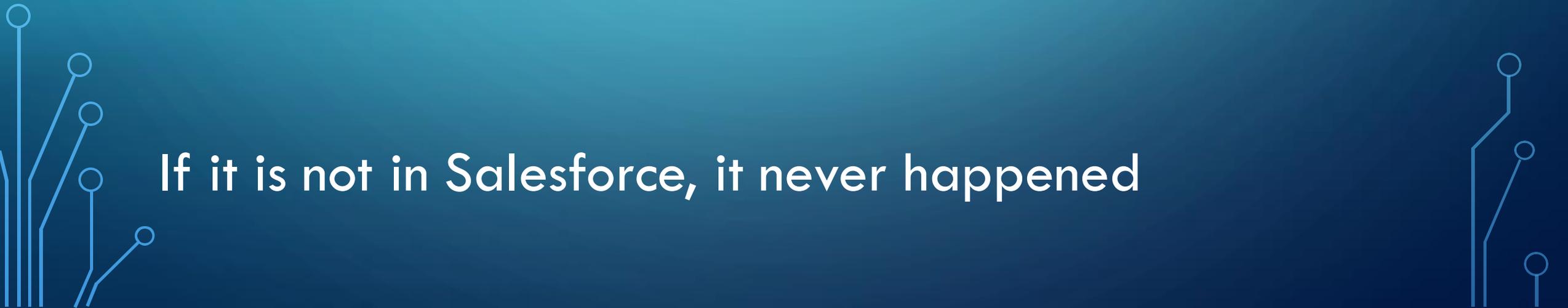


CASES NEED TO BE CREATED FOR EVERYTHING

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	<input type="checkbox"/>		
Edit	Lisa Maynard	Accounting		Assistant	lmaynard@dutchmillerauto.com [Gmail]	(304) 529-2301 ext. 1111	<input type="checkbox"/>		
Edit	T.J. Henson	Executive	Finance Manager	General Manager	tjhenson@dutchmillerauto.com [Gmail]	(304) 343-7700	<input type="checkbox"/>		
Edit	Tommy Grubbs	Sales	F&I Manager	F&I Manager		(304) 529-2301	<input type="checkbox"/>		
Edit	EJ Mandigo		Former Employee			(304) 529-2301	<input type="checkbox"/>		

[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

Case Edit

Save Save & Close Save & New Cancel

Case Information

! = Required Information

Account Name 

Case Owner Felicia Carpenter

Contact Name 

Description Information

Subject

Dev ID #

Description

Developer

Internal Comments

Target Version

Feature Set 

Grade 

Root Cause Category 

Additional Information

Product Type 

Case Origin

Product 

Status

Case Reason

Stage 

Type

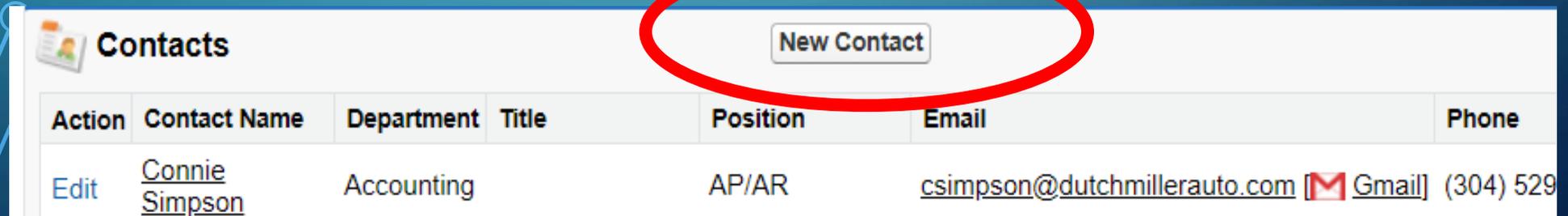
Level

Priority

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



The screenshot shows the Salesforce interface for the 'Contacts' list. A red circle highlights the 'New Contact' button in the top right corner. Below the button is a table with columns for Action, Contact Name, Department, Title, Position, Email, and Phone. The first row of data shows a contact named Connie Simpson in the Accounting department, with the position AP/AR and email csimpson@dutchmillerauto.com. The phone number is (304) 529-XXXX.

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

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

Contact Edit

Save Save & New Cancel

Contact Information

! = Required Information

Contact Owner Ava Champion

Salutation --None-- v

First Name

Last Name

Suffix --None-- v

Account Name Auto/Mate, Inc. 🔍

INACTIVE Contact

Title

Department v

Position --None-- v ⓘ

Inquiry Type --None-- v

Phone (518) 371-4331

Secondary Phone

Mobile

Email

3rd Party Authorizer ⓘ

Reports To 🔍

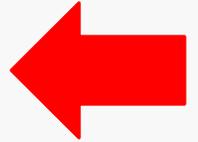
Do Not Call

Email Opt Out

Satisfaction Score (CSM)

Date of CSM Satisfaction Score [8/27/2020]

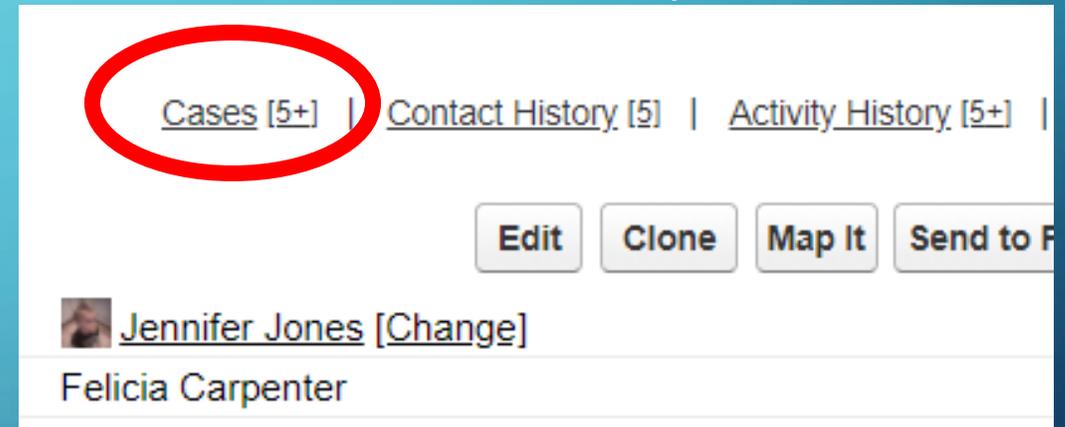
CSM Satisfaction Comments



If checked, contact will not receive marketing emails

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

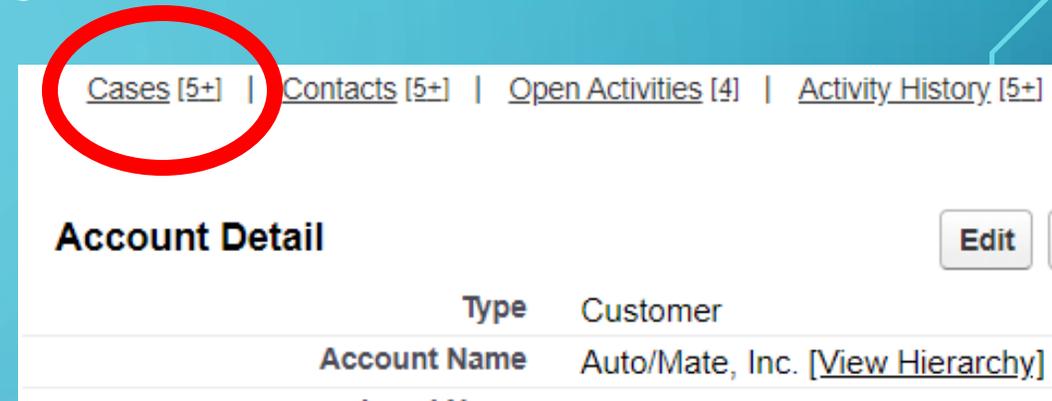


- Sometimes others from the same dealership call in to report the same issue.
 - In this instance, you should check the dealership's cases to see if there is a current case created (IE. Sever down)
 - If there is already a case, let them know who already reported the issue and that we are working with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

Account
Zimmerman Ford (SOLD TO Via Carlita, LLC DBA Hawk Ford of St Charles)

- Instead, make a case for the DBA store



THANK YOU FOR ATTENDING!

QUESTIONS?

COMMENTS?