User Guide

Salesforce's Service App

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Introduction

This document is divided into the following chapters:

- Chapter 1, “Intended Audience”, describes the intended users of this document.
- Chapter 2, “Creating New Records in Salesforce’s Service App”, gives an overview of how to create new records in a specific Salesforce App (Service App).

1 Intended Audience

This guide is intended for users who are familiar with Salesforce but maybe not as familiar with its Service App.

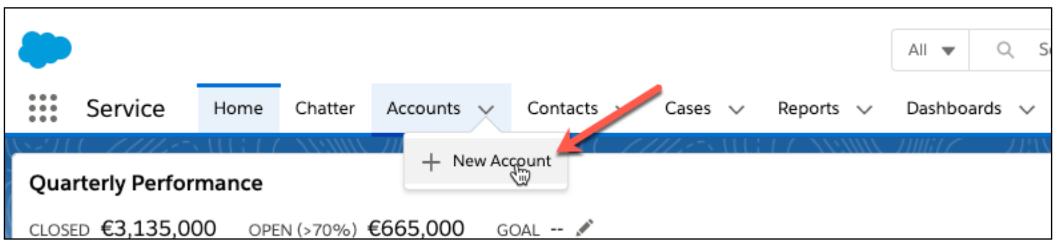
- Users: Those who need to learn how to create new Service App records. This guide assumes that you are a high-school graduate from the US or you speak English as a foreign language.

2 Creating New Records in Salesforce’s Service App

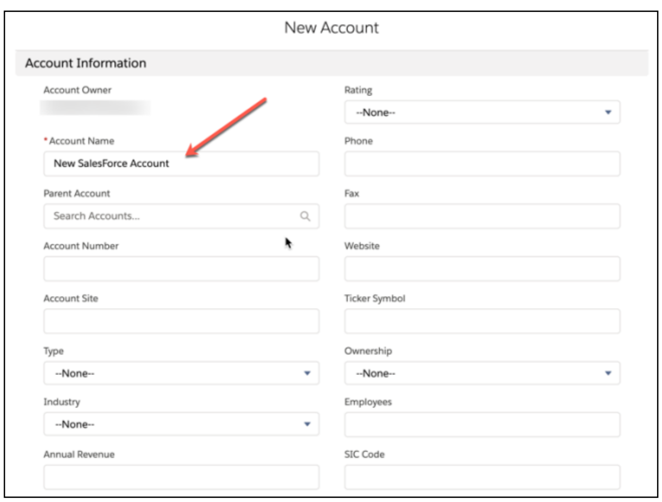
2.1 How to Create an Account

An account is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

1. Click on the drop-down next to the **Accounts** tab in the top navigation bar and select **New Account**.



2. In the **New Account** dialog, enter all required fields.



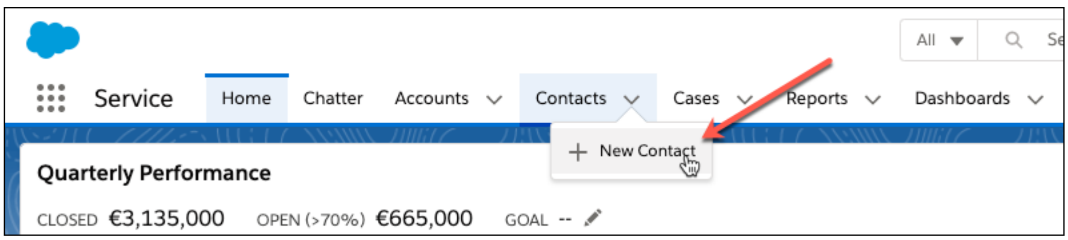
3. Click **Save** at the bottom of the window.

4. This green banner displays after your **Account** is created.

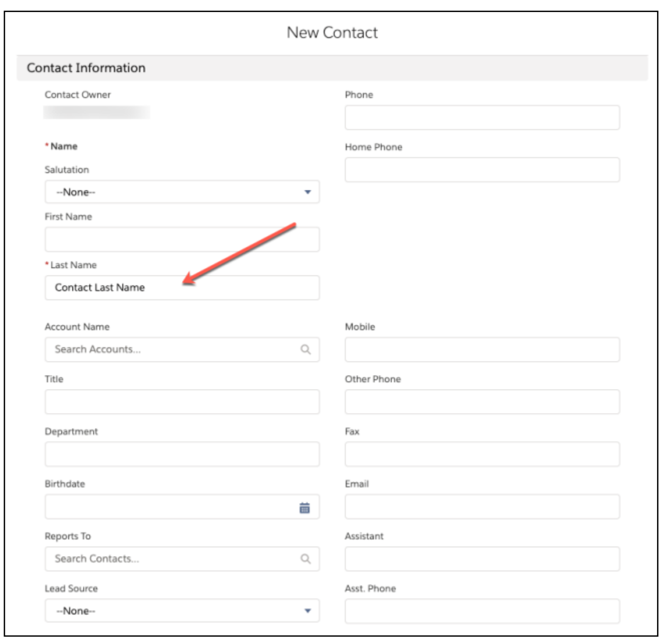
2.2 How to Create a Contact

Contacts are the individuals associated with your accounts.

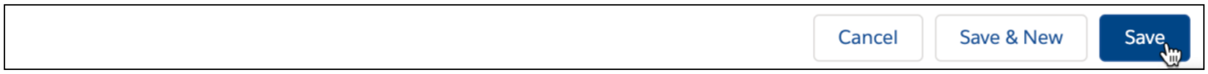
1. Click on the drop-down next to the **Contacts** tab from the top navigation bar and select **New Contact.**



2. In the **New Contact** dialog, enter all required fields.



3. Click **Save** at the bottom of the window.

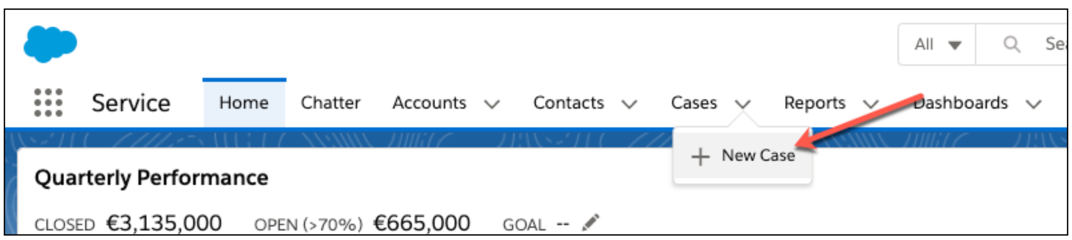


4. This green banner displays after your **Contact** is created.

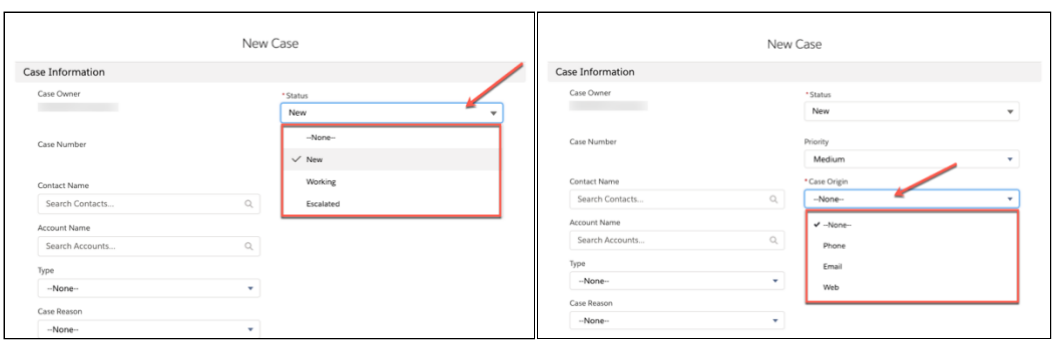
2.3 How to Create a Case

A case is a detailed description of a customer's feedback, problem, or question. Cases are used to track and solve customer issues.

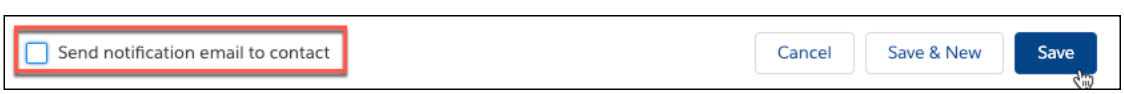
1. Click on the drop-down next to the **Cases** tab in the top navigation menu and select **New Case**.



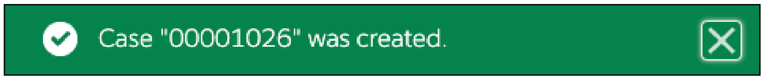
2. In the **New Case** dialog, enter all required fields. Note the available **Status** and **Case Origin** selections in the red boxes.



3. Click **Save** at the bottom of the window. Note that you can select the **Send notification email to contact** in the red box.



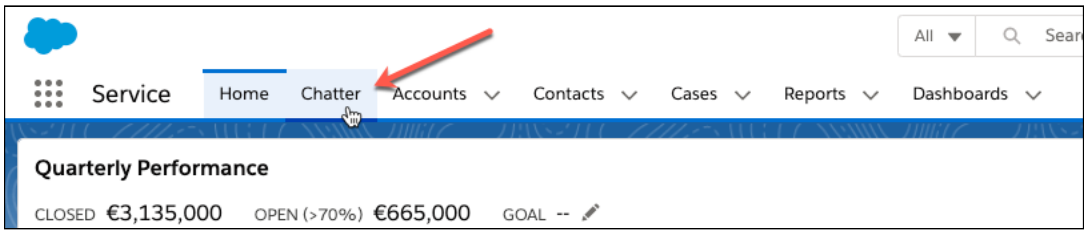
4. This green banner displays after your **Case** is created.



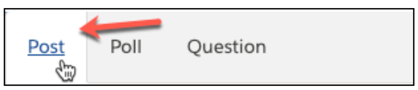
2.4 How to Create a Chatter Post

A Chatter Post is a comment in a Chatter feed.

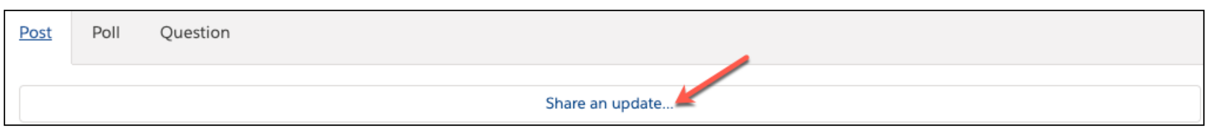
1. Click on the **Chatter** tab from the top navigation menu.



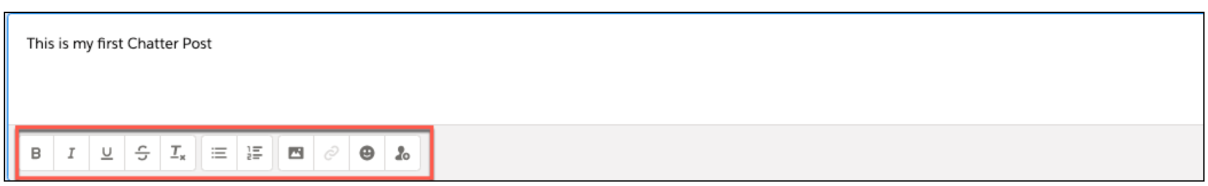
2. Select **Post** from the Chatter menu.



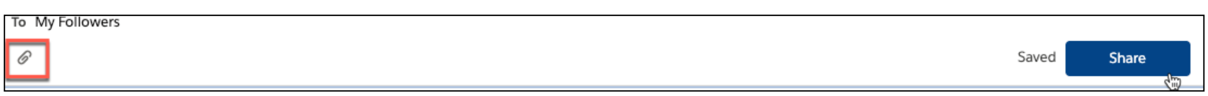
3. Click in the **Share an update…** field to activate the post editor.



4. Type in your post text. Note the formatting options in the red box.



5. Click on **Share** at the bottom of the post editor. Note the option to attach a file in the red box.



6. Your **Post** displays in the Chatter feed.