



# 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).

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# 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.

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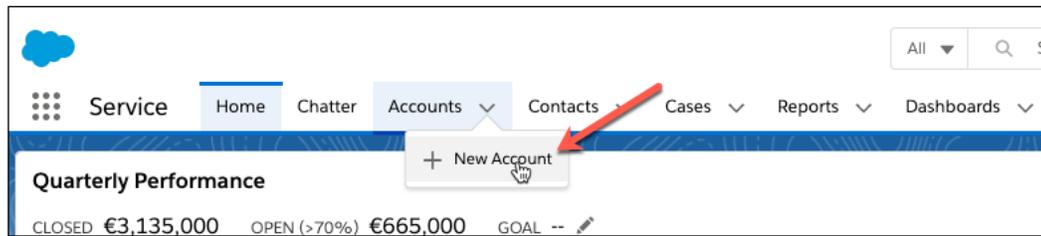
## 2 Creating New Records in Salesforce's Service App

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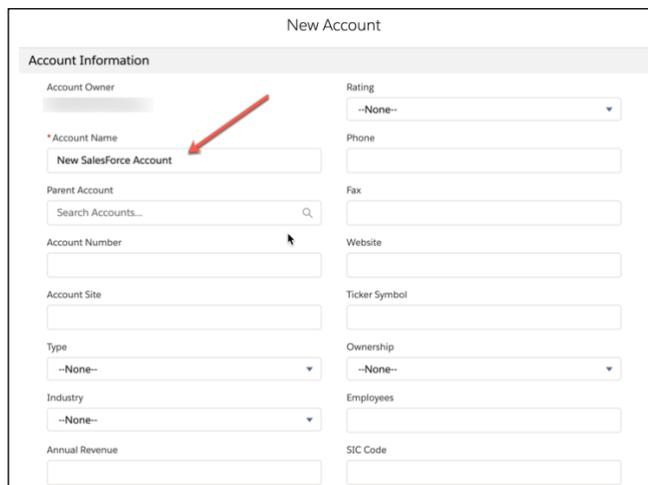
### 2.1 How to Create an Account

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.

A screenshot of the 'New Account' dialog form. The form is titled 'New Account' and is divided into two columns. The left column contains fields for 'Account Owner', 'Account Name' (with a red arrow pointing to it), 'Parent Account' (with a search box), 'Account Number', 'Account Site', 'Type', 'Industry', and 'Annual Revenue'. The right column contains fields for 'Rating', 'Phone', 'Fax', 'Website', 'Ticker Symbol', 'Ownership', 'Employees', and 'SIC Code'. The 'Account Name' field is pre-filled with 'New Salesforce Account'.

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



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

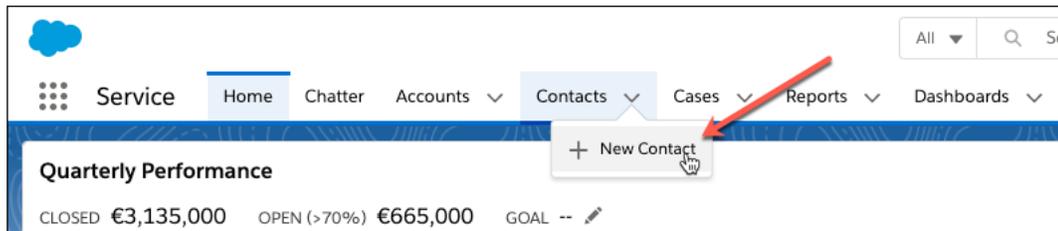


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## 2.2 How to Create a Contact

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.

A screenshot of the 'New Contact' dialog form. The form is titled 'New Contact' and has a 'Contact Information' section. It contains various input fields: 'Contact Owner' (text), 'Phone' (text), '\* Name' (text), 'Salutation' (dropdown), 'Home Phone' (text), 'First Name' (text), '\* Last Name' (text), 'Contact Last Name' (text), 'Account Name' (text with search icon), 'Mobile' (text), 'Title' (text), 'Other Phone' (text), 'Department' (text), 'Fax' (text), 'Birthdate' (text with calendar icon), 'Email' (text), 'Reports To' (text with search icon), 'Assistant' (text), 'Lead Source' (dropdown), and 'Asst. Phone' (text). A red arrow points to the 'Contact Last Name' field.

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



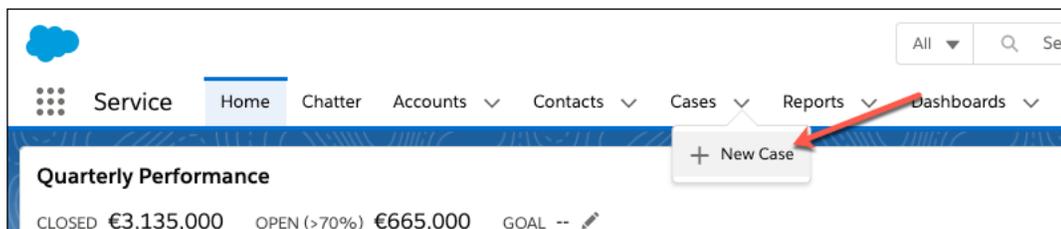
4. This green banner displays after your **Contact** is created.



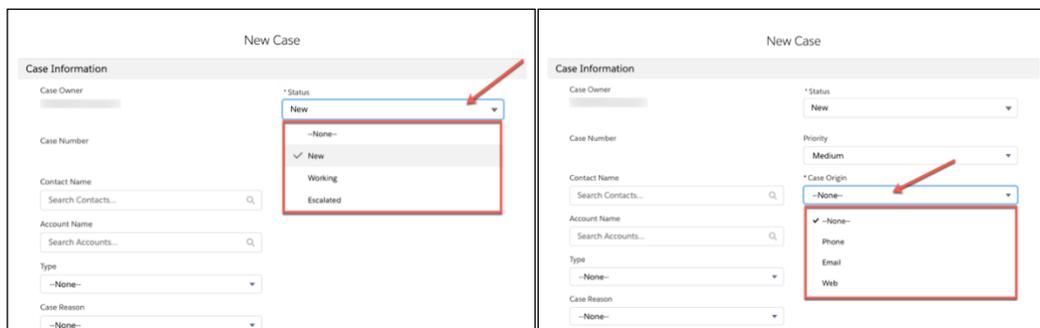
## 2.3 How to Create a Case

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**.



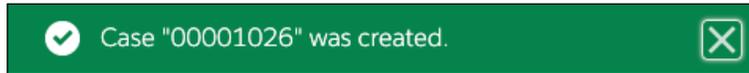
2. In the **New Case** dialog, enter all required fields. Note the available **Status** and **Case Origin** selections in the red boxes.



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



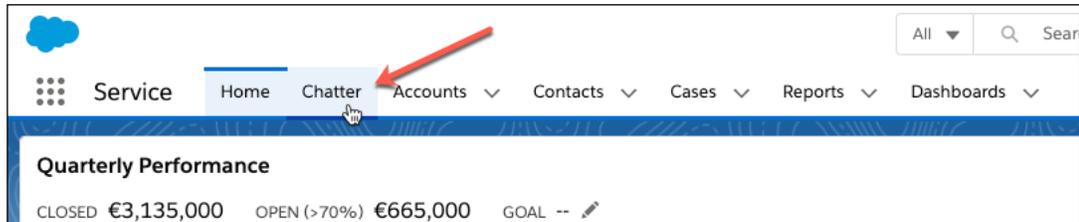
4. This green banner displays after your **Case** is created.



## 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.



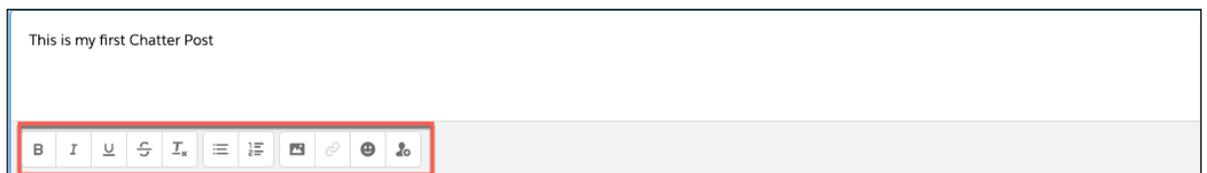
2. Select **Post** from the Chatter menu.



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.

