SalesForce

CRM: How to....

Version 2 (post MVP rollout)

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CRM: How to....The minimum data requirements for Gas Operations, in CRM, are steps 1, 2, 3.

1. Log a query (or complaint) / create a case

A Query or Complaint will always originate from a person - therefore the Query or Complaint Case should be raised from within that **Contact's Related tab** – this auto-populates the correct Account and Contact details to the Case.

- Open **Contact**
- Select **Related**
- Scroll to **Cases**
- Select **New**
- Select **Query** or **Complaint**
- **Enter Received Date/Tim**e - this is the date and time it was received
- **Enter Acknowledgement Date / Time** - this is when you confirm back to the customer that you have received the Query/Complaint
- **Select Fuel Type** - is the Query/Complaint in regards to a gas or electricity service
- **Select the correct Category** - there may be sub-categories to select depending which service the Query/ Complaint is in regards to
- **Case Origin** - select where the case came from i.e. a conversation or an email
- **Case Reason** - select the reason the case is being created - why the customer contacted you
- **Enter a Subject** and **Description**
- **Enter Site** - if relevant to specific site
- Complete all the mandatory fields and **Save**

Please Note – for existing open cases, update with Fuel Type and Case Category when you next update the case.

2. Record next steps and log BI

Once a case has been created, please ensure that the Case Owner is correct. If the case is better dealt with by another team, re-assign the case before adding any 'Next Steps'.

All next steps can be managed using the right hand **Activity Feed**. Options available are as follows:

Log a Call (does not have to be a call, this option can be used to log emails, conversations etc.).
- Select **Case**
- Select **Log Call**

Complete all mandatory and applicable fields including the **BI score**
- Select **Save**

Create a Task
- Create a **Task**
- Select **Case**
- Select **New Task**

Complete all mandatory and applicable fields
- Select **Save**

Only once a task has been completed, can **BI** be added
- Select the **Task**
- Select **Edit**

Add BI to **Additional Information** (at this point you can also mark the task as complete).
- Select **Save**

Create a New Event
- Create a **New Event**
- Select **Case**

Select **New Event** Complete all mandatory and applicable fields
- Select **Save**

Only once an event has been created, can **BI** be added
- Select the **Event**
- Select **Edit**
- Add BI to **Outcomes**
- Select **Save**

3. Close a case

Only should a case be closed when:

- Next steps have been recorded
- BI has been captured

To close a case:

- Find and navigate to relevant **Case**
- Select **Status** (right hand **Activity Feed**)
- Select **Closed**
- Complete the remaining entry fields:
  - **Root cause**
  - **Resolution code**
  - **Date/time closed** (this can be backdated)
- Select **Change Status**