Suggestions for Finding/Tracking Related Cases/Parent Cases in SalesForce

05/23/2024 3:28 pm EDT

The following are not required procedures, but they are Amy's tips and tricks on ways to make finding and tracking cases easier.

Once a Case has been assigned to me, I always try to update the Case Subject Information to be more specific so it will be easier to find if needed.

Examples

Example 1:

Subject when Case is Create: **Sedona-X**

After reading Case Details I update the Subject: **Sedona-X: User Role Groups**

Example 2:

Subject when Case is Create: **Invoice Issue**

After reading Case Details I update the Subject: **Jobs: Tax Issue on Invoice**

Adding the Module or Software to the Subject Line.

I always try to put the Module or Software that the issue is pertaining to at the beginning of the Subject Line.

Examples:

WeSuite: Importing Change Orders Issue

SedonaWeb 1.0 – Customer Cannot Access Payment Portal

Master Account – Cycle Invoicing Issue

AP – Vendor Bill Deleted

EFT Processing – Unsettled Transaction

AR Reports – AR Aging by Effective Date

Cycle Billing – ACH Hold Date Issue

Sedona-X – Cannot Save Notes

Searching for Case by the Module or Software in the Subject Line

By Updating the Subject Details, this makes it much easier to Search for a Case with the same Module/Software Issue.

Example: Searching for Sedona-X Issues

Process for Keeping Track of Cases/Issues sent to DEV.

I created a Main Folder – "Development" – and each time I create a Template and transfer a Case to Development I create a Subfolder and include the Case Number – Company – Issue.

If there is already a Case in DEV with this same issue, I include the Parent Case Number in the Folder Details