

Assigning a Salesforce Case to a Technician

06/04/2024 10:00 am EDT

Assigning A Case to a Technician

Step 1 – Open case to view customer concerns and ensure all important case information has been entered correctly, such as:

- Account Name
- Contact Name
- Product
- Subject
- Description (and any screenshots that may assist)

The screenshot shows the 'Details' tab of a Salesforce case. The 'Case Information' section is expanded, displaying a list of fields and their values. The 'Status' is 'New', 'Impact' is 'Minor', and 'Secondary Case Owner' is 'SedonaOffice'. The 'Account Name' is 'Xenoge Technologies Test', 'Contact Name' is 'Courtney Petherick', and 'Case Origin' is 'Phone'. The 'Priority' is '3 - Moderate'. The 'Issue Size' is 'Small'. The 'Description Information' section is also expanded, showing a 'Text' field with the value 'Please assist with this test error'.

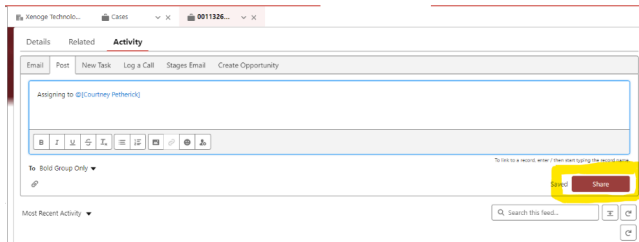
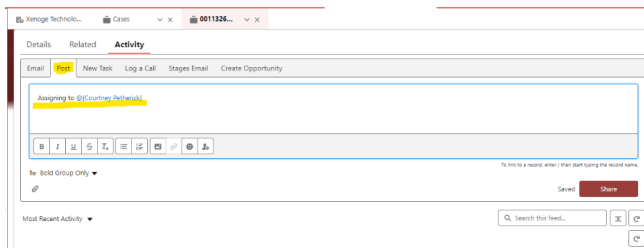
Field	Value	Action
Case Number	00113266	
Case Owner	Courtney Petherick	
Secondary Case Owner	SedonaOffice	
Account Name	Xenoge Technologies Test	
Contact Name	Courtney Petherick	
Case Origin	Phone	
Priority	3 - Moderate	
Issue Size	Small	
Is Last Activity by Case Owner?	<input type="checkbox"/>	
Days Since Last Activity	0:00	
Reconciliation Audit	<input type="checkbox"/>	
Category		
Status	New	
Impact	Minor	
Product	SedonaOffice	
Sub Product	Mobile App	
Functional Area	Sedona X Mobile	
Detailed Functional Area	Navigation	
Software Used	Maritou (Pass); SedonaCloud;	
Module		
Version		
Request Category		
Request Type		
Billable/Non-Billable		
Related Project		
Related Project (Simple Text)		
Related Opportunity		
Text	Please assist with this test error	
Steps to Reproduce Issue/Error		
Internal Comments		

Step 2 – Once all information is verified and case is ready to be assigned to a Support Technician, click the case Activity Tab along the top left, above Case Information section.

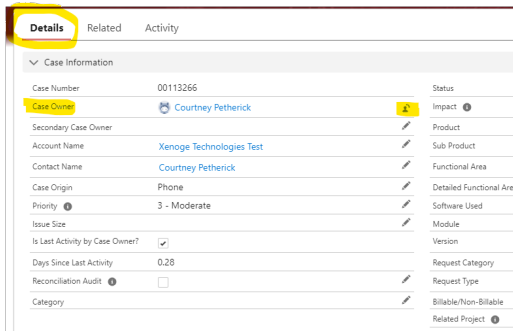
The screenshot shows the 'Details' tab of a Salesforce case, with the 'Activity' tab selected. The 'Case Information' section is expanded, displaying a list of fields and their values. The 'Status' is 'New', 'Impact' is 'Min', and 'Secondary Case Owner' is 'Sed'. The 'Account Name' is 'Xenoge Technologies Test', 'Contact Name' is 'Courtney Petherick', and 'Case Origin' is 'Phone'. The 'Priority' is '3 - Moderate'.

Field	Value	Action
Case Number	00113266	
Case Owner	Courtney Petherick	
Secondary Case Owner	Sed	
Account Name	Xenoge Technologies Test	
Contact Name	Courtney Petherick	
Case Origin	Phone	
Priority	3 - Moderate	
Status	New	
Impact	Min	
Product	Sed	
Sub Product	Mo	
Functional Area	Sed	
Detailed Functional Area	Nav	
Software Used	Mar	

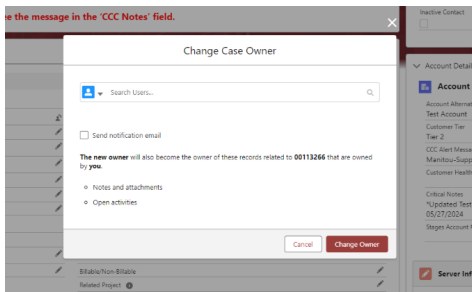
Step 3 – Click the second option from the left, labelled “Post” and write “Assigning to @_____” in the text box. You must put an @ symbol before typing the Technician’s name you are assigning the case to in order for it to link to them and send them a notification via Salesforce. Click “Share” when finished.

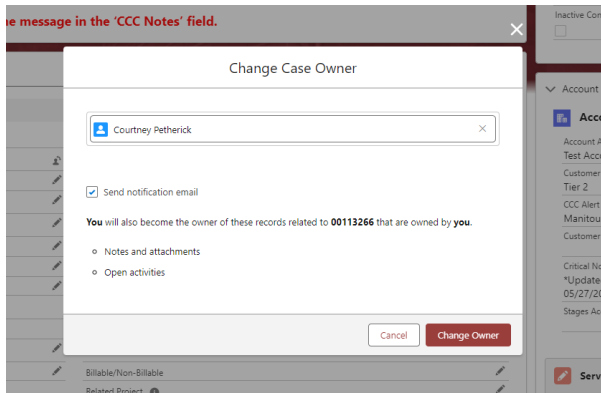
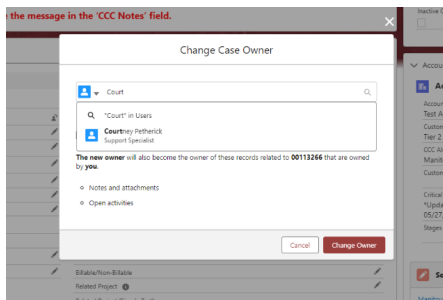


Step 4 – Return to “Details” page of case. Edit Case Owner by clicking the icon shown below.



Step 5 – Begin typing the name of the Support Technician you are assigning the case to, and once they appear in the drop down, click their name. Then click the check box “Send notification email”. This will ensure that an email is sent to the Support Technician to notify them that a case has been assigned to them.





Step 6 – Save all changes by clicking “Change Owner” and now the case is properly assigned to the technician.