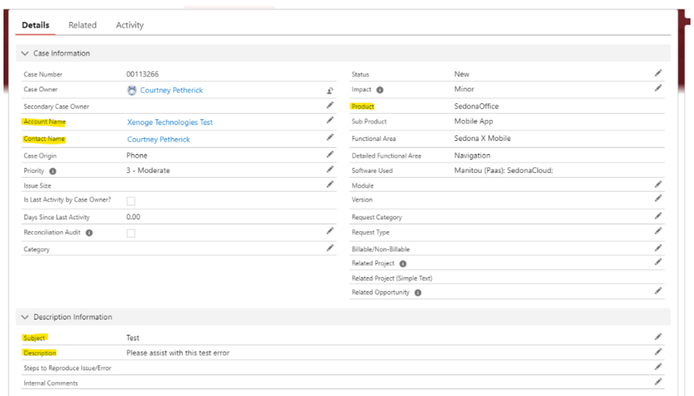
Assigning a SalesForce Case to a Technician

06/04/2024 10:00 am EDT

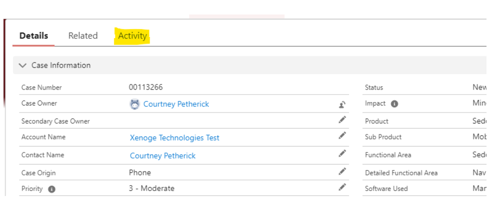
Assigning A Case to a Technician

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

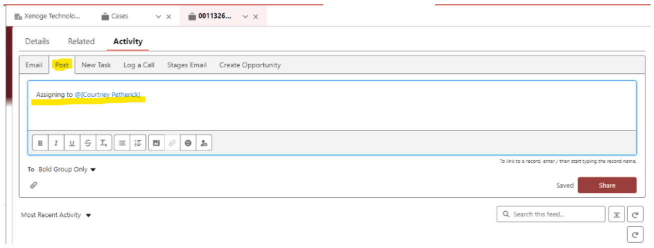
- Account Name
- Contact Name
- Product
- Subject
- Description (and any screenshots that may assist)

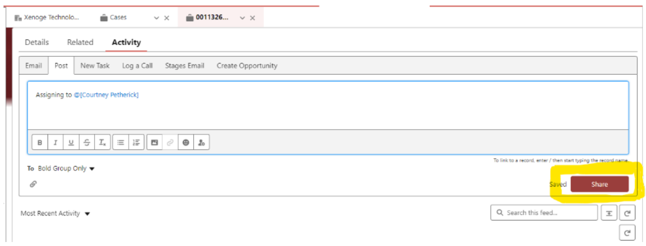


Step 2 – Once all information is verified and case is ready to be assigned to a Support Technician, click the case Activity Tab along the top left, above Case Information section.

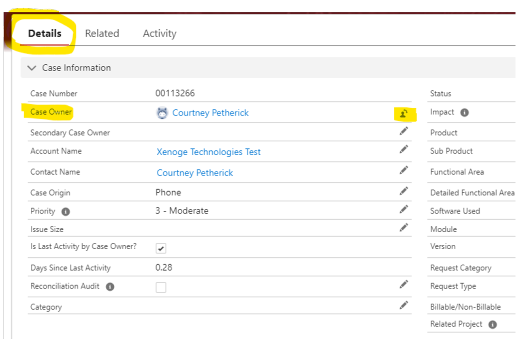


Step 3 – Click the second option from the left, labelled "Post" and write "Assigning to @________" in the text box. You must put an @ symbol before typing the Technician's name you are assigning the case to in order for it to link to them and send them a notification via SalesForce. Click "Share" when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

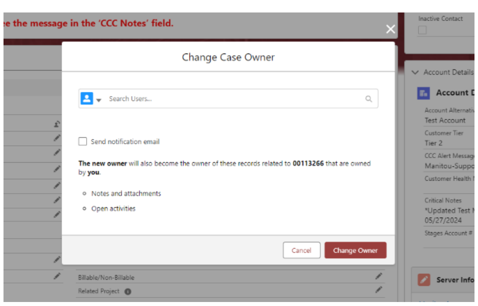


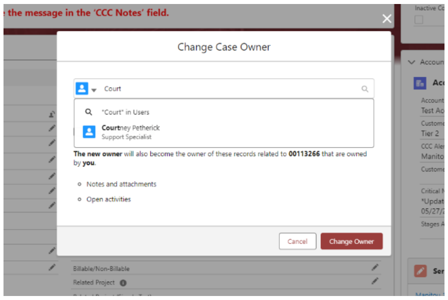


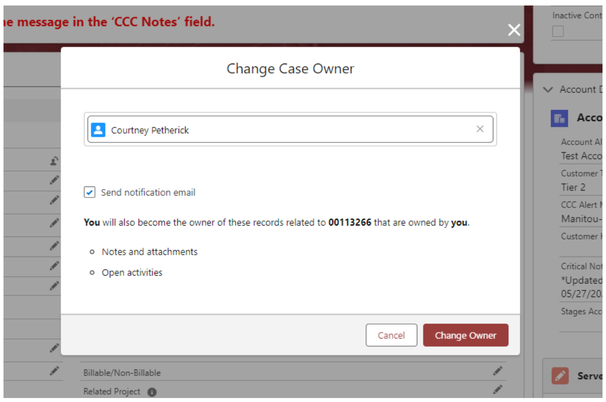
Step 4 – Return to "Details" page of case. Edit Case Owner by clicking the icon shown below.



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.