Training Quick Start Guide (QSG)

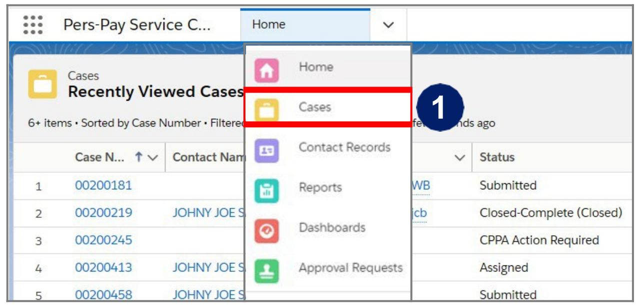
How to Manage a Case as a CPPA

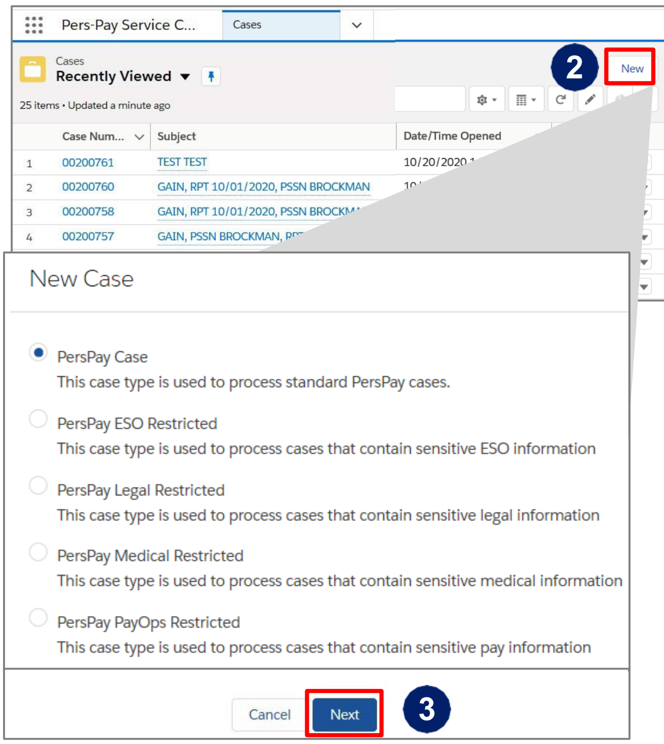
The following steps will help you effectively initiate and manage your Salesforce cases as a CPPA.

Part 1: Create a New Case

1. Once logged into Salesforce, select **Cases** from the home drop-down menu.

2. From the Cases page, select **New** from the top right corner to create a case.



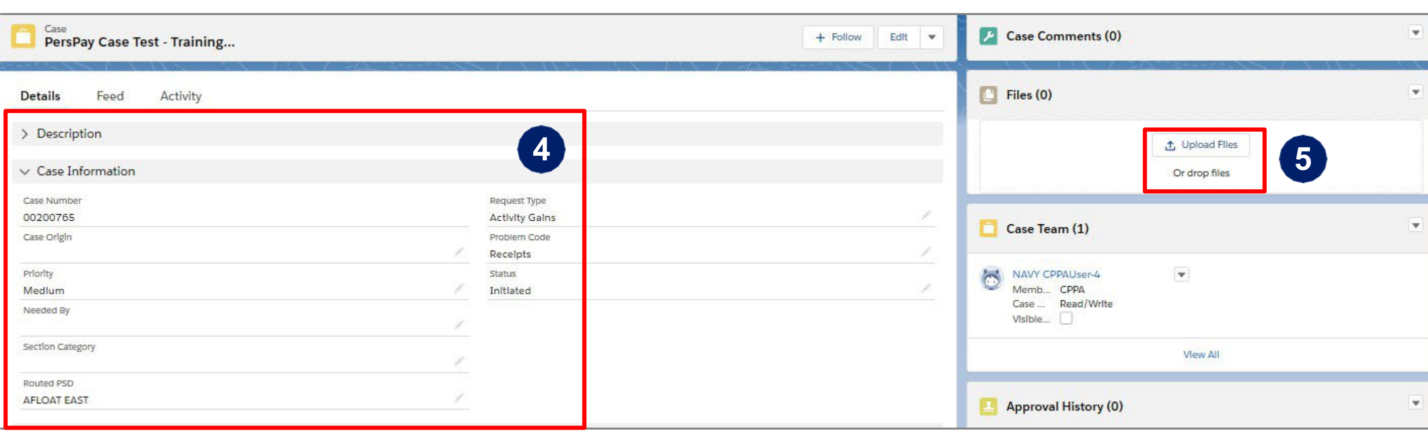


3. The New Case pop-up will appear. Select the **type of case** you want to initiate and then select **Next.**

4. The New Case page will appear. In this example, we will go through a *PersPay Case* type. **Enter** all case details. The below items marked with a red asterisk are required in order to save.
   - **Subject**
   - **Description**
   - **Request Type**
   - **Problem Code**
   - **Status:** Enter ***Initiated***
   - **Routed PSD**
   - **Contact Name**

5. To upload all relevant files, select **Upload File** under the Files section on the right-hand column.

Reminder: *Always review and confirm all required information is provided and signatures are in place prior to uploading files to the case.*



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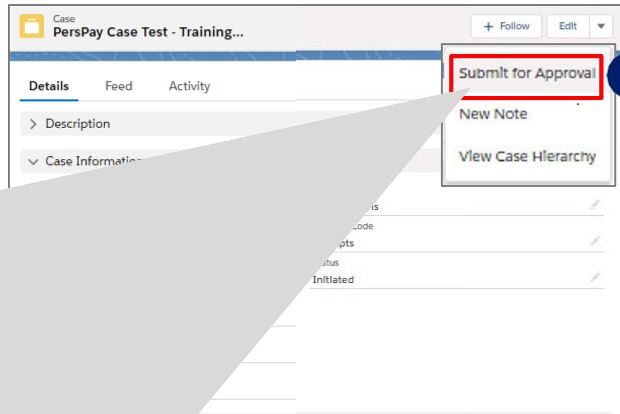
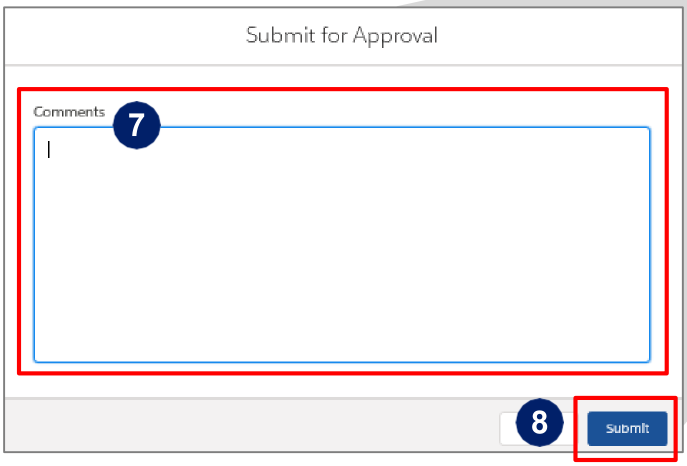
Please follow the steps below to ensure you can perform your role as a CPPA in Salesforce.

Part 2: Submit Case for Approval

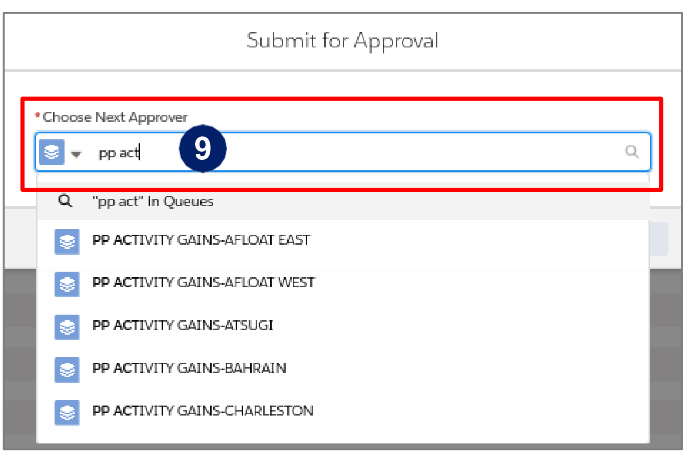
6 Once all of the case information has been populated and all documents have been uploaded, you are now ready to submit the case to a TSC/PSD for processing. To do so, select **Submit for Approval** from the Edit drop-down menu on the upper right-hand corner.



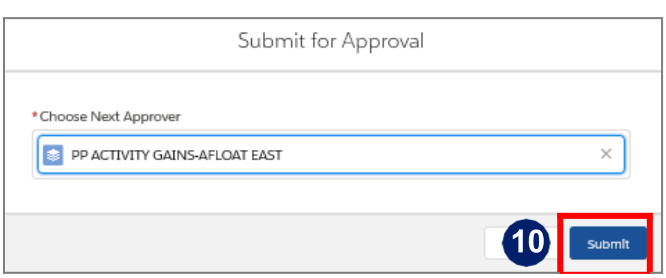


7 The Submit for Approval pop-up will appear. **Enter comments** to help the TSC/PSD process the case.

8 Select **Submit**.



9 Next, you will need to select the next approver of the case. From the drop-down, select **Queue** and enter the name of the appropriate TSC/PSD queue. A drop-down of available queues will appear. Select the appropriate queue.



10 Confirm you have selected the right queue for the case. Then, select **Submit**. The case has been rerouted to the appropriate queue for review and processing.

Note: *When submitting a case for approval, you are to always select a queue for the next approver and not an individual person.*

When you submit a case for approval, you will lock the case from any further edits. ***ALWAYS double check that you have all required information and paperwork included in your case before submitting and locking the case.***