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.