

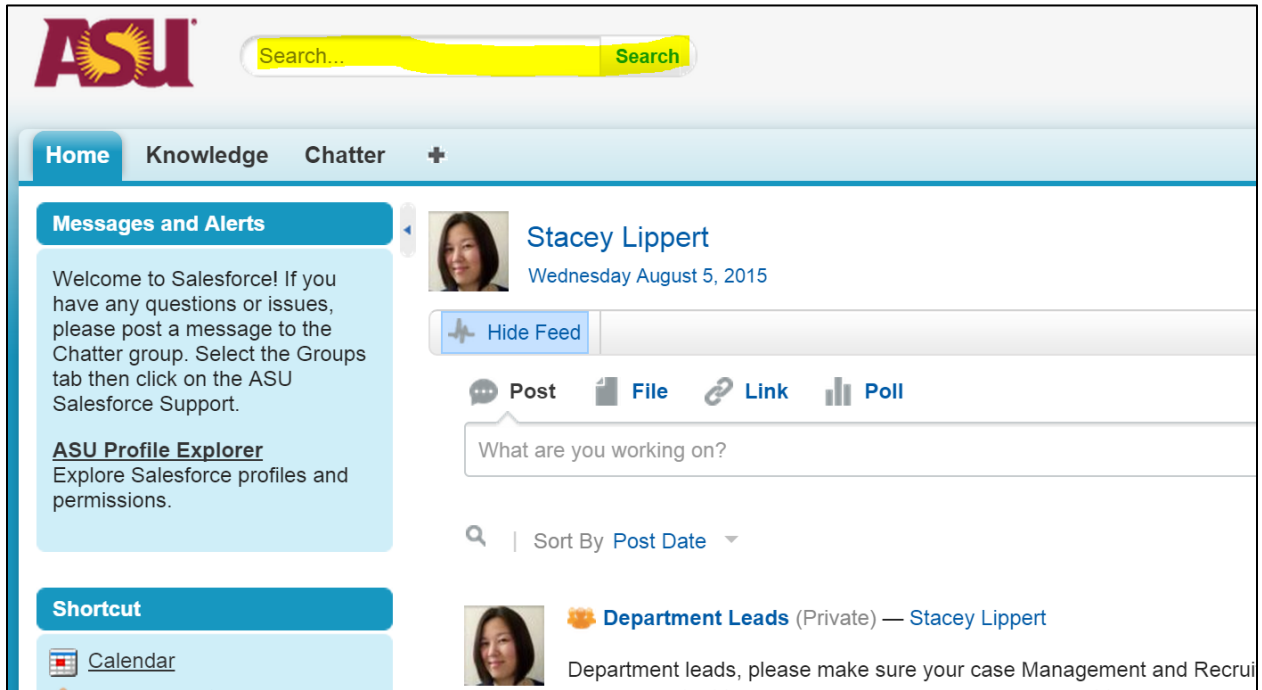
# Salesforce View Only Access

## Basic Student Lookup Instructions for AAB

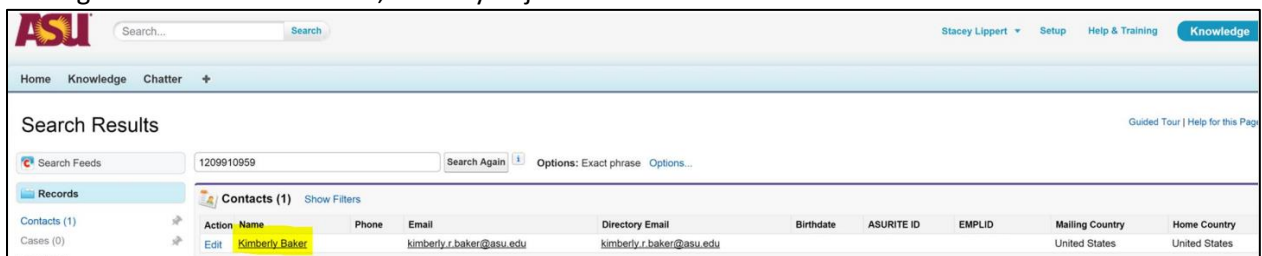
**Please note:** Some information about the student has been redacted on this handout. When you are in Salesforce, you'll be able to see items such as birthday, ASURITE, student ID, etc.

If you have any questions, please feel free to contact [Stacey.Lippert@asu.edu](mailto:Stacey.Lippert@asu.edu).

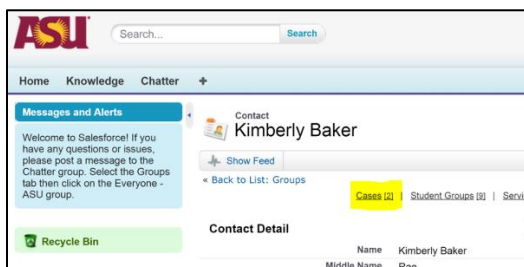
1. When you log into Salesforce, you can type the Student ID, ASURITE, email, or name in the search box at the top right of the screen to find information on them.



2. You'll get to the results like this, where you just click on the contact's name:



3. Then on the contact detail page, you can click on "Cases" to see what she's submitted and then click on the case to see the details.



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- A pop up view shows by hovering over "Cases". Or you can drop down to the list of all cases by clicking on "Cases".

The screenshot shows the Salesforce interface for user Stacey Lippert. The main content area displays the profile of Kimberly Baker. Below the profile, there is a 'Cases' section with a table listing two cases:

Action	Case	Subject	Status	Priority	Functional Group	Category	Sub-Category	Date/Time
<a href="#">Edit</a>   <a href="#">Cls</a>	00762744	Major Change	Closed: Resolved	Normal	Admission Services - Undergraduate	Applicant Services	Major Change	4/14/2015 3:44 PM
<a href="#">Edit</a>   <a href="#">Cls</a>	00740082	Addition to Education Page	Closed: Resolved	Normal	ESM Online			4/6/2015 11:53 AM

The screenshot shows a detailed view of a case in Salesforce. The case is titled 'Major Change' and is associated with the contact Kimberly Baker. The case details are as follows:

Action	Case	Subject	Status	Priority	Functional Group	Category	Sub-Category	Date/Time Opened	Owner
<a href="#">Edit</a>   <a href="#">Cls</a>	01058173	Account Inquiry	Closed: Resolved	Normal	Student Business Services	Collections	Response to Outgoing Call/Email/Letter	8/5/2015 1:48 PM	Jennelle Rivers
<a href="#">Edit</a>   <a href="#">Cls</a>	00762744	Major Change	Closed: Resolved	Normal	Admission Services - Undergraduate	Applicant Services	Major Change	4/14/2015 3:44 PM	Loretta Martinez
<a href="#">Edit</a>   <a href="#">Cls</a>	00740082	Addition to Education Page	Closed: Resolved	Normal	ESM Online			4/6/2015 11:53 AM	ESM Online (Case)

- Lastly, once you are in a case, you can click on the Feed tab to read the activity taken on the case. If there were any notes that were entered or emails to the student through Salesforce, they are all visible there:

The screenshot shows the 'Major Change' case page in Salesforce. The case details are: Case Number 00762744, Created Date 4/14/2015 3:44 PM. The case description is 'Student request to change from Non-degree Online to Non-degree on Tempe campus.' The case is owned by Loretta Martinez. The 'Feed' tab is selected, showing a list of updates for this case:

- Loretta Martinez** to ASU Salesforce Enterprise Only closed this case. (Comment - Like - April 20, 2015 at 11:21 AM)
- Loretta Martinez** changed Case Owner from Admission Services - Undergrad (Case) to Loretta Martinez. (Comment - Like - April 20, 2015 at 8:51 AM)
- Jenna Hutchinson** changed Category from Recruitment Operations to Applicant Services. (Comment - Like - April 14, 2015 at 3:44 PM)