

Welcome to ASU Connections Case Management Training

Technical Assistance email: salesforce.support@asu.edu

Salesforce: <https://asu.my.salesforce.com>

Salesforce Sandbox (practice): <http://links.asu.edu/uatsandbox>

Online Training: <http://links.asu.edu/sftraining>

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Introduction

Salesforce is a cloud-based system which users can integrate their business processes allowing automated functionality. This functionality can assist in reducing workloads and enabling an increased focus on customer service. It provides a central location to manage student prospects and all communication to and from the student.

The goal of the ASU Connections implementation as a part of a service initiative to provide students with enhanced support from the time they become a prospective student through their years as alumni. Everyone that helps students will have access to a student's contact record and be able to see a list of cases they have opened, as well as a history associated with the student's record.

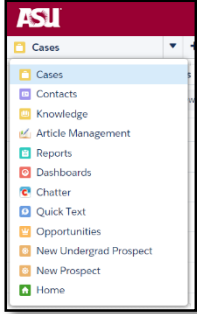
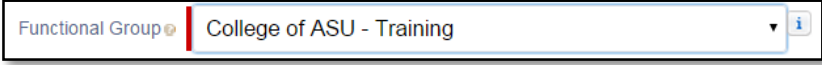
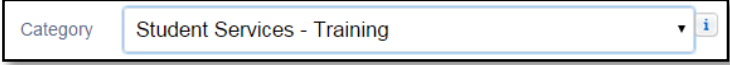
What is Case Management?

Salesforce Case Management offers us:

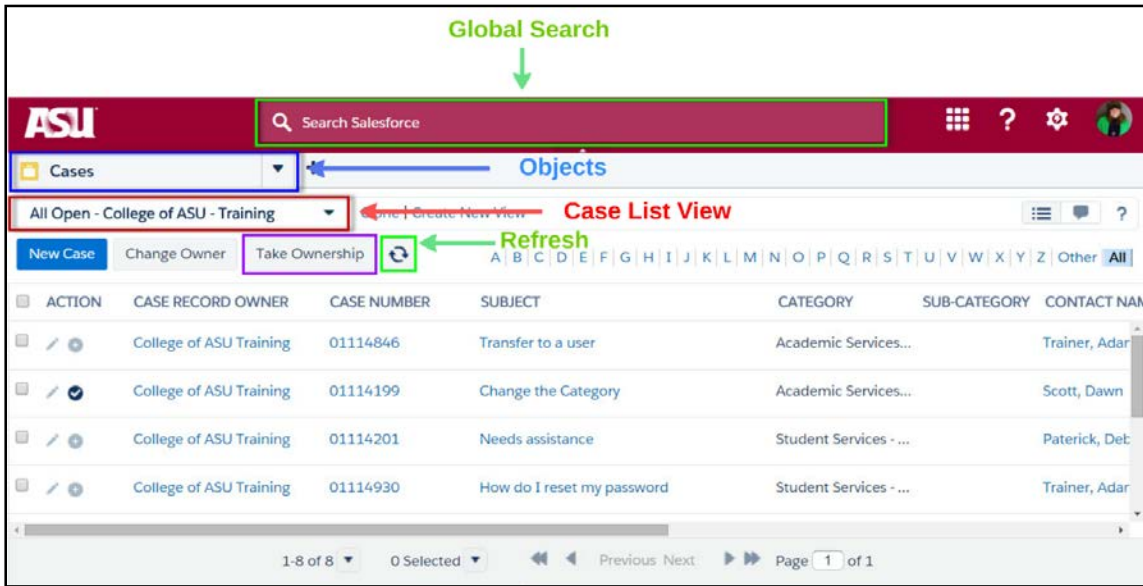
- Centralized information on current and past requests for service within or external to our unit.
- It allows us to create workflow rules for automated routing, so that the sharing of information is done behind the scenes as opposed to having students walk or call from office to office, person to person.
- Allows us to create cases and track how our resources are being used. We can now easily quantify the amount of service being provided via email or phone or web or walk-ins.
- There is accountability for us to provide timely and accurate resolution to issues and allow the students to give us feedback on the experience.
- Collaboration - this is a big one. Being able to interact with others across your department or ASU on that student's case, consolidating the back and forth email trail, escalating issues, assigning to the right person, and outcome

Key Terms

The following are some terms you will hear referenced frequently throughout this document.

Terms	Definition
<p>Objects</p>	<p>An object is a collection of components inside the ASU Connections interface such as, Cases, Chatter, Contacts, Reports and Dashboards that address a specific business need.</p> <p>For example, the Contact object allows you to store demographic information about students. Each object stores specific types of information.</p> 
<p>Contact Record</p>	<p>A Contact Record contains demographic information, case history, and other related data associated with the person and is created by:</p> <ul style="list-style-type: none"> • Nightly PeopleSoft Import • Prospect imports (including: webform submissions, event registrations and test score submissions) • Manual data entry
<p>Functional Group</p>	<p>The Functional Group is a department or college.</p> 
<p>Category</p>	<p>The Category is a team or service category within a given Functional Group.</p> 
<p>Sub-category</p>	<p>The Sub-category is a sub-team or area of focus within a team.</p>
<p>Case List</p>	<p>The Case List is the collection of Cases that are assigned to a unique Functional Group.</p> <ul style="list-style-type: none"> • All Open – Lists all the open cases for your Functional Group and owned by you • Closed – Lists all the closed cases for your Functional Group and owned by you. • My Open Cases – Are Cases that are only owned by you. • Department - Lists cases owned by your functional group and category

Service Console



Search for a Contact Record

To search for a specific student within ASU Connections, you can use the **Global Search** box at the top of the service console.



You can search by first/last name, phone number, email address, or street address.

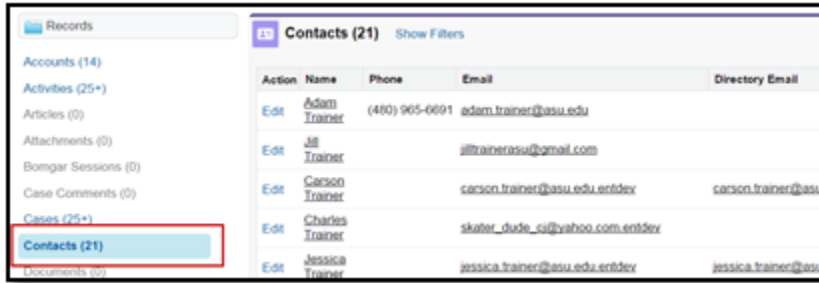
1. Use the asterisk (*) as a wildcard function will allow you to search more records. If you start with the asterisk, then the search will look for records that contain the phrase.



2. If you end the phrase with an asterisk, then it will search for records that start with that phrase. Always perform a search before entering any new records.



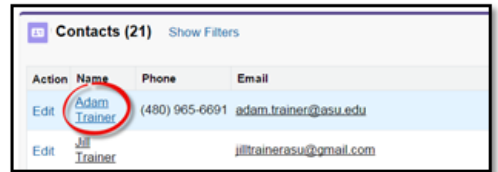
3. Click on the Contact records on the left side.



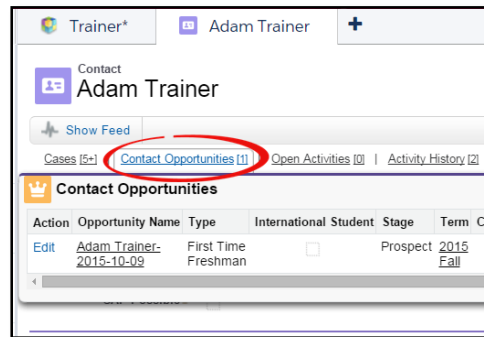
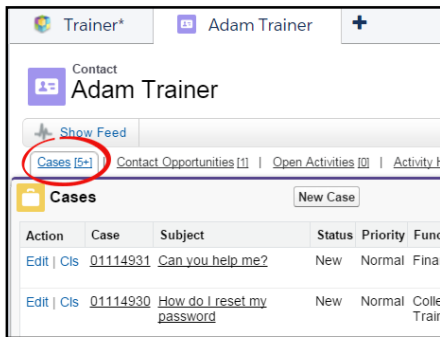
4. Choose the contact who has asu.edu for their email address. Use your departmental business process to verify the identity of this person.



5. Once you locate the student you are looking for, click on the contact name to open their record.

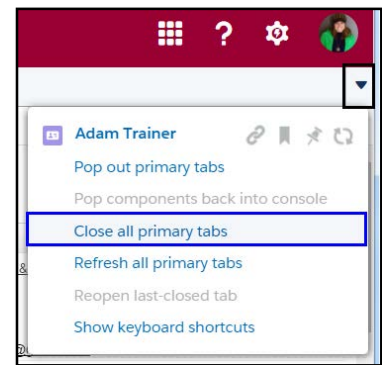


6. From the contact record, you can review the student Case History and Recruitment information by hovering over Cases and Contact Opportunity.



The fastest way to get back to the main Service Console

1. Click the drop down in the Upper Right corner of the screen
2. Choose Close all primary tabs



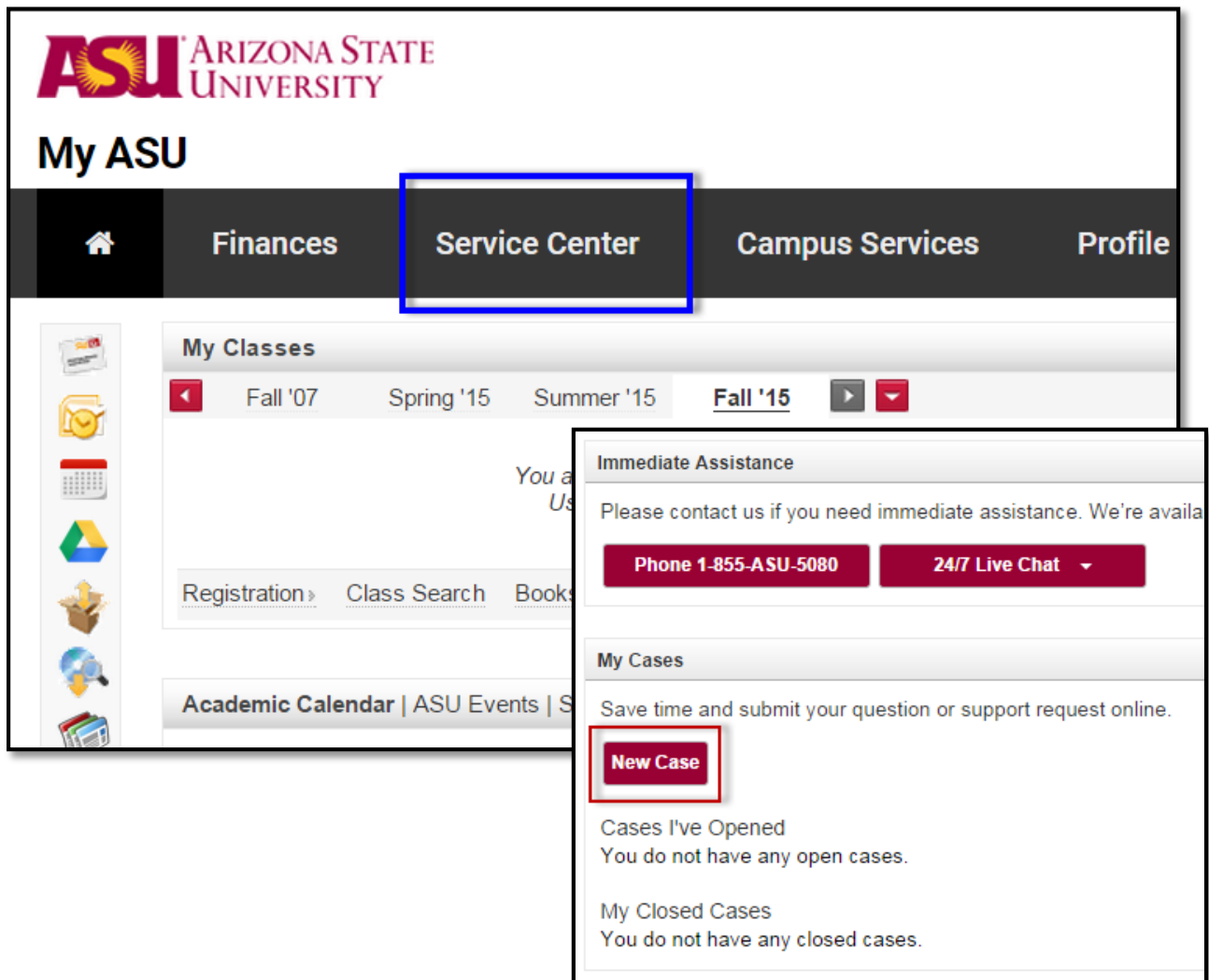
Creating New Cases

Four ways a Case can be created:

- My ASU Service Center (By a Student)
- Manually created (Walk-in or Phone Calls from Student or customer)
- An email is sent to your departments alias

My ASU Service Center (Student View)

A student logs into My ASU, click on the Service Center tab and submits a New Case that will be routed to the appropriate functional group or college to address.



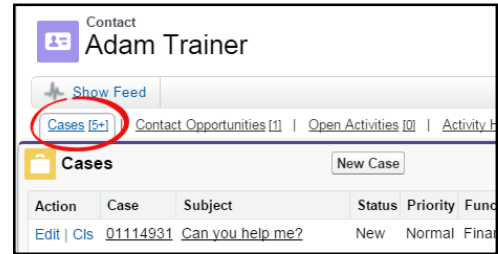
Manually Create a New Case

When might you manually create a case?

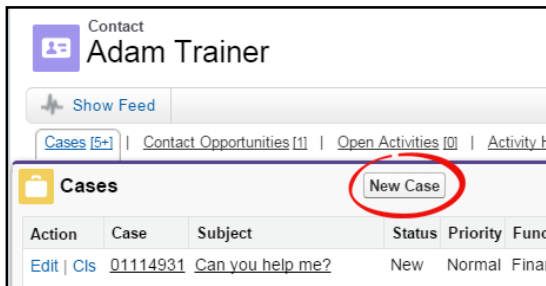
- A student walks in and you provide a service that should be documented
- To transfer information to another functional group
- If a student emails your personal email

1. Search for the student and Open their contact Record
2. Review the students contact record

3. Hover over Cases.

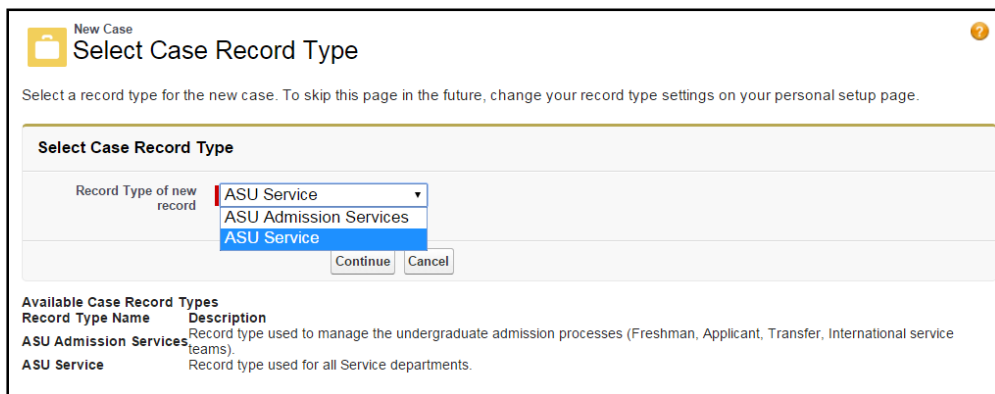


4. Click on **New Case**.



Note: When you click on New Case, if you have multiple roles in ASU Connections you may come across the screen below.

- A. If you are in Admission Services, choose ASU Admission Services
- B. If you are not in Admission Services, choose ASU Service



Case Edit: New Case record

5. Select your **Functional Group** from the dropdown.

6. Change the **Status** and **Priority** if necessary. Identify the **Affiliation** (How is the customer associate with ASU), the **Origin** (how the customer contacted you) and the **Campus** (which campus you are located).

7. Enter the **Subject** of the interaction and add case details in the **Description** field.

NOTE: When you manually create a case for a student, the student will see the following information in the Service Center tab of the student's My ASU account; Case Number, Subject & Description, what functional group owns the case and any emails you send from within that case. ***Before you can transfer a Case, the Subject & Description must be completed.**

8. Saving the New Case:

Save - to save the case and continue working it (Send student an email, collaborate, transfer)
Save & Close – Choosing this option will close out the case (no follow up needed) not the window.

Save & New –Save the current case and open a new case.

After you save your new case you can perform all of the following functions:

- Collaborate with colleges by @mentioning them
- Email the student
- Transfer the case

Collaborate (@Mention)

To mention a person:

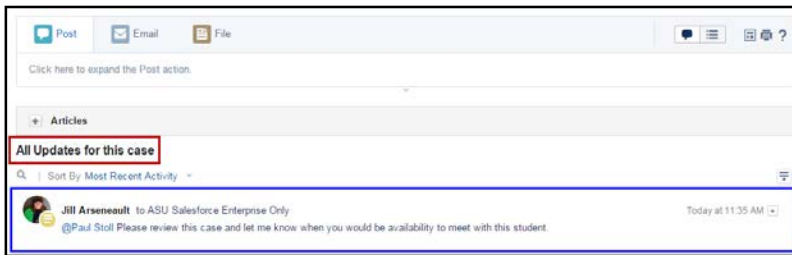
1. Type @FirstName LastName to highlight a user. This will ensure that the comment is sent to the person.



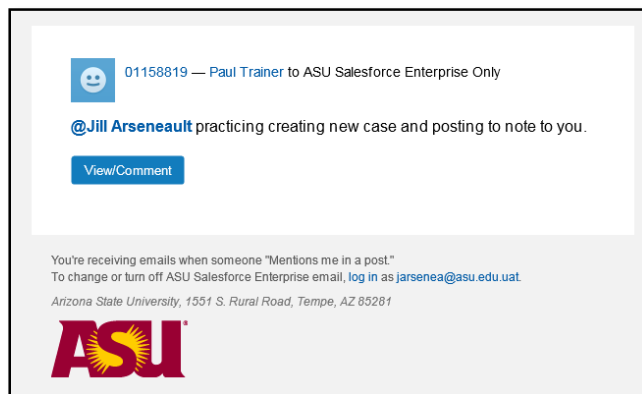
2. Then type message and Share your Post



3. Your post will show under **All Updates for this case**, your post also appears in the person's **To Me Feed** and Chatter sends an email notification to the people you mentioned.



Sample email notification:



Send an Email

1. Click **Email** from the Case Feed View (To see more email Functionality go to [Reply to Student](#))

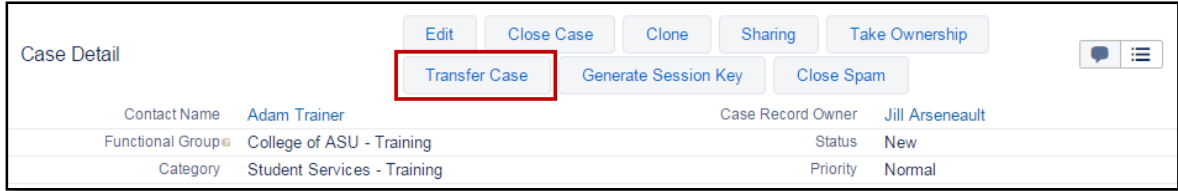


- **FROM:** Needs to have your alias.
 - Click **Send Email**.
 - Scroll down on the page to see your email listed under **All Updates for this Case**.
- A. If you are ready to close your case see [Resolve Case](#)
B. If you need to transfer your case see [Transferring your Case to a User](#) or [Transferring your Case to another Functional Group](#).

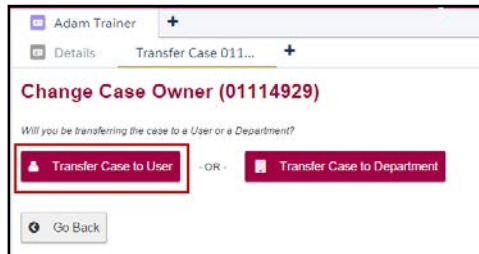
Transferring Cases

Transfer the Case to a User in your Functional Group

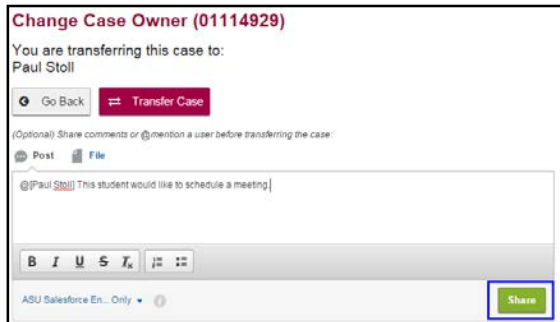
1. Open the Case and **Click Transfer Case**



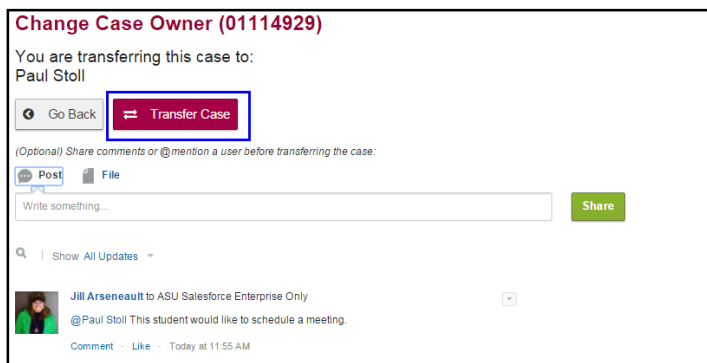
2. Click **Transfer Case to User**



3. You will only see a list of users who are in your Functional Group. Click on the Users name you would like to transfer the case to.
4. You will want to @mention the user you are transfer this case to so they receive an email notification letting them know you have transferred a case to them. Be sure to **Share your Post.**



5. Then you click **Transfer Case.**



Transfer to A Different Category within Your Functional Group

***Before you can transfer a Case, the Subject & Description must be completed.**

You receive a case from a student that needs to be answered by a different (category) team within your functional group.

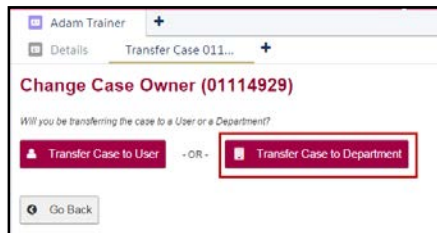
1. Click on the Detail button to display the case details.



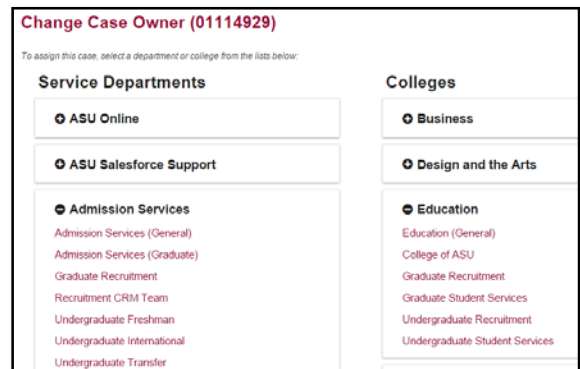
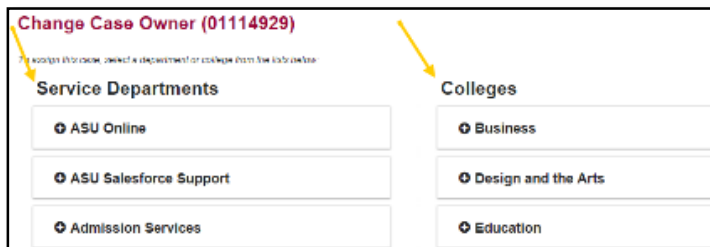
2. Click **Transfer Case**.



3. Click **Transfer Case to Department**

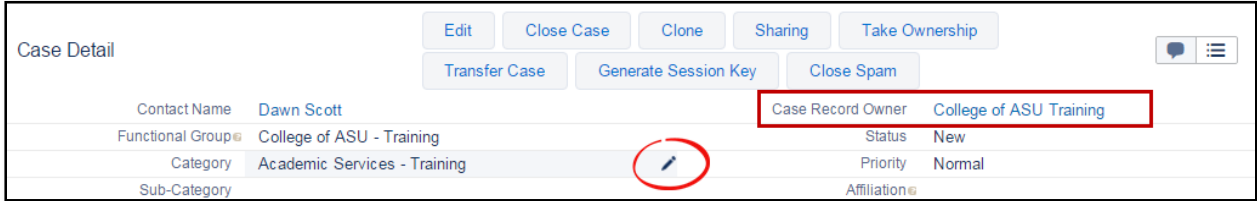


4. Click the **+** sign next to your functional group and select the appropriate category.



Alternate Method – Check that the Case Record Owner says your functional group.

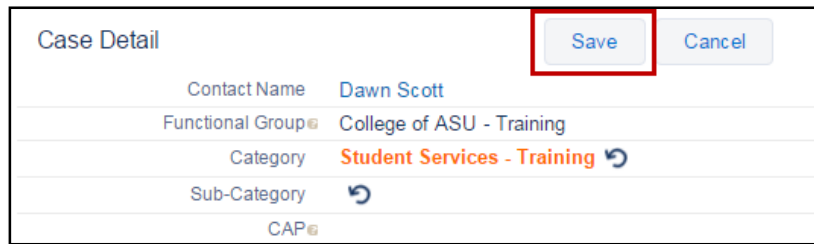
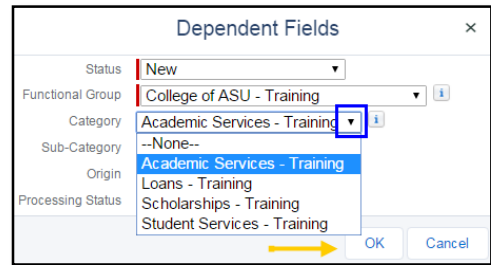
1. Hover over the category field and Double Click the Pencil icon to open the **Dependent Fields** window.



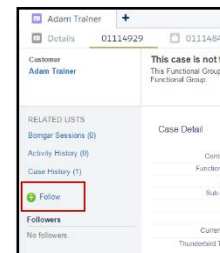
2. Select the **Category** for the team who should handle the case.

Note: Never change the Functional Group from the Dependent Fields screen.

3. Click **Save**. The case will automatically be listed in the appropriate Case List View.



4. You can follow the case should you wish to know the outcome or any updates on it.



Transfer a Case to a Different Functional Group

***Before you can transfer a Case, the Subject & Description must be completed.**

You receive a case from a student but the case needs to be answered by another department using ASU Connections.

- From the List View click the **Case Number** or **Subject** to open the Case.
- Click on the Detail button to display the case details.



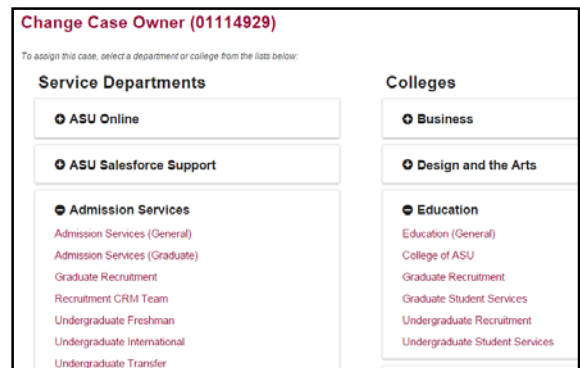
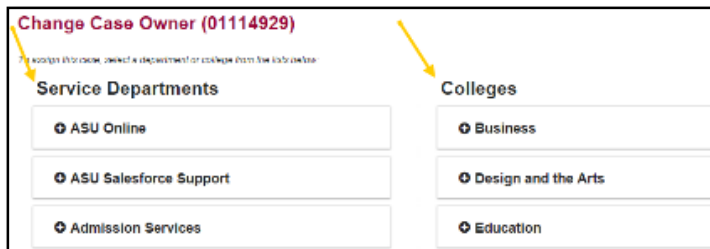
- Click **Transfer Case**.



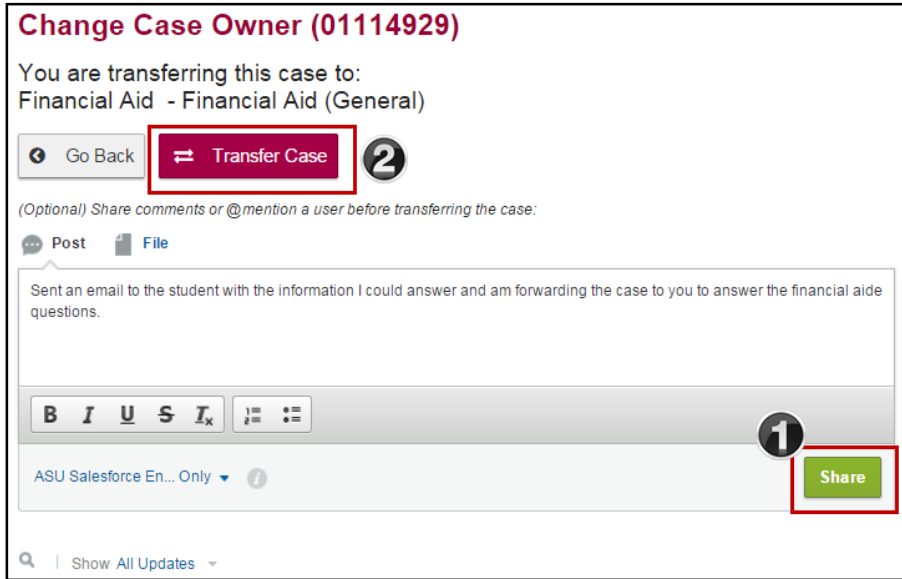
- Click **Transfer Case to Department**



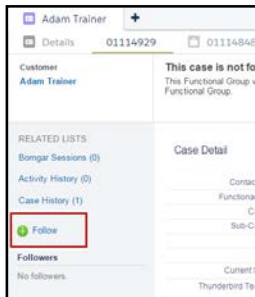
- Click the **+** sign next to the Service Department or College to reveal specific options



- 10. You can @mention a user if you know who the case needs to be handled by, if not leave notes in the Chatter feed before you click Transfer Case.



- 11. You can follow the case should you wish to know the outcome or any updates on it.

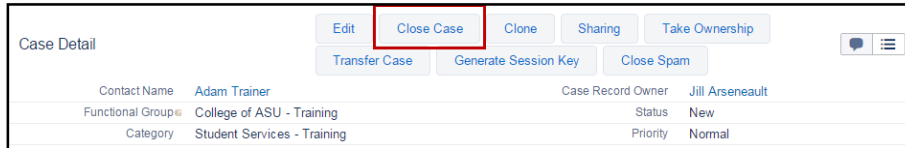


Forward to Another Department Not Using ASU Connections

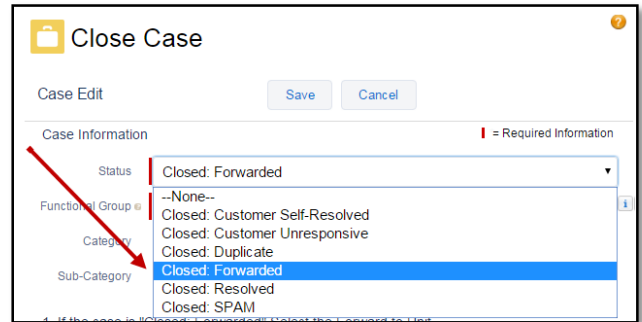
***Before you can transfer a Case, the Subject & Description must be completed.**

- Review the Case
- Verify the Department is not in Salesforce (Transfer Case)
- Email the student to inform them that you are Closing & Forwarding their case

1. From the Case Details, Click **Close Case**

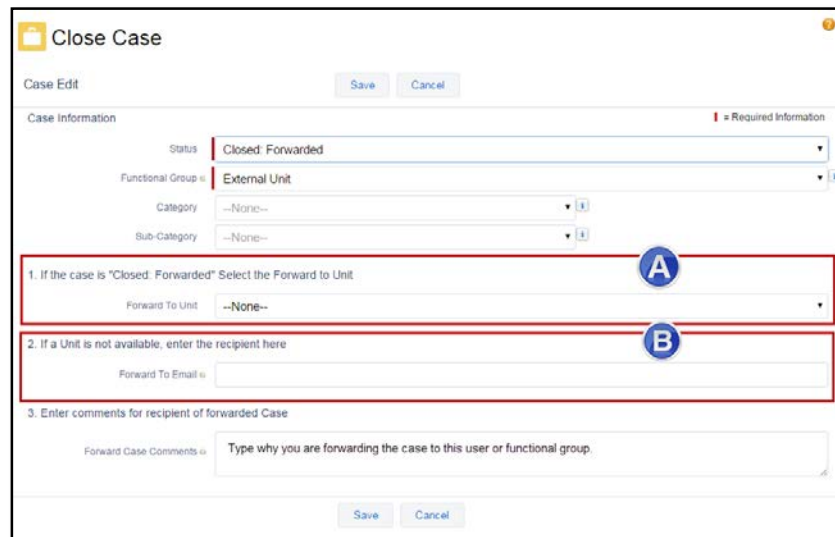


2. Change the Status to **Closed: Forwarded**.



A. In the drop-down menu choose the Unit to which you want to forward the case. If the item you are looking for is not on the list select **Other Unit**.

B. If forwarding to an individual enter their email address.

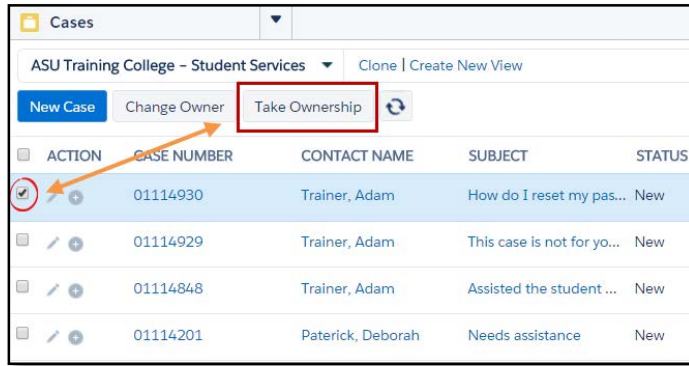


- Be sure to input a clear and professional message to the recipient about why you are transferring the case to them and any other details because the recipient may not be able to get into Connections to see the case details.
- Click **Save**. An email with case information will be sent to the external unit.

Working the Case List View

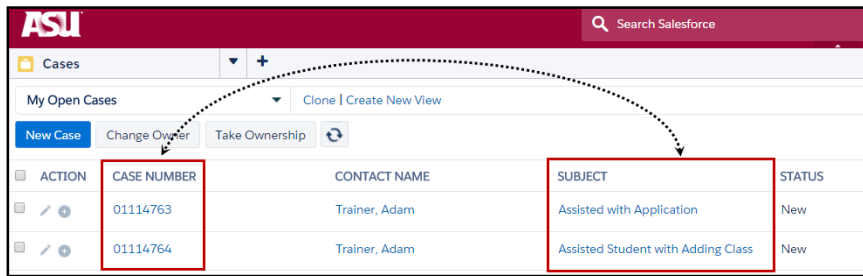
Taking Ownership of a Case

To Take Ownership of a case click on the box next to the Case you want and then click **Take Ownership** to accept the case as yours.



To Open and View a Case

To Open and View a case, Click on either the **Subject** or the **Case Number**.



Contact Details vs. Case Details

Contact Details	Case Details
Name, Email, Address, Phone, Birthday	Contact Name
Deceased	Functional Group (department) case is assigned to
Email Opt Out, Do Not Call	Case Owner
Parent Email	Status: Open, In Progress, Closed
Event Attendance	Origin
Interests	Subject and Description
Scholarships	Private Notes
Source List	
Marketing/Communication Campaigns	
Previous Education	
Test Scores	

Case Details

To access the Case Details, click on the details icon.



- A. View the Contact Name
- B. Review Functional Group this case was assigned to.
- C. Change the Category, Sub-Category, Case Owner or Status of the case
- D. Brief Contact Information
- E. Subject & Description of the Case
- F. Follow this case

Customer: Adam Trainer
Case ID: 01114930
Subject: How do I reset my password
Description: Hello, I am not able to get into MyASU, can you help me reset my password? Also, I need to register for my spring classes. Thanks, Jill Arseneault, M.Ed. Instructional Designer University Technology Office Arizona State University 480-965-6691 jarsenea@asu.edu<mailto:jarsenea@asu.edu> [ASU-Greening Maroon Gold-HR-110px]

Functional Group: College of ASU - Training
Category: Student Services - Training
Status: New
Priority: Normal

Case Detail (button)

Contact Name: Adam Trainer
Case Record Owner: Jill Arseneault
Functional Group: College of ASU - Training
Status: New
Category: Student Services - Training
Priority: Normal

Contact Information (dropdown)

Subject and Description (dropdown)

Follow (button)

G. View the Case Attachments

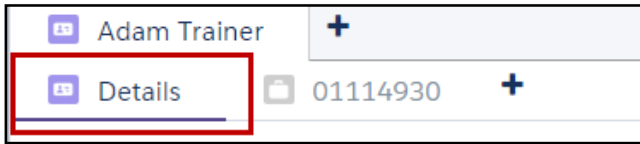
Case Attachments

All Attachments [Attach File](#)

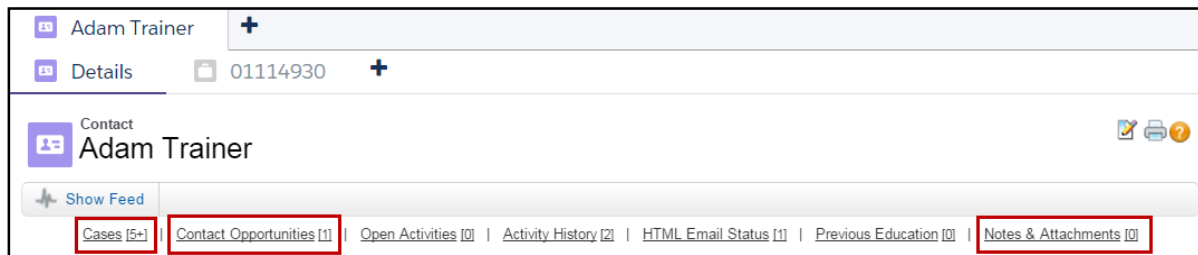
Action	File Name	Size	Last Modified	Created By
Edit View	SalesforceCaseManagement.docx	1768 KB	4/6/2015 11:32 AM	Jill Arseneault

Contact Details

1. Click on the Details tab to review the Contact Details.

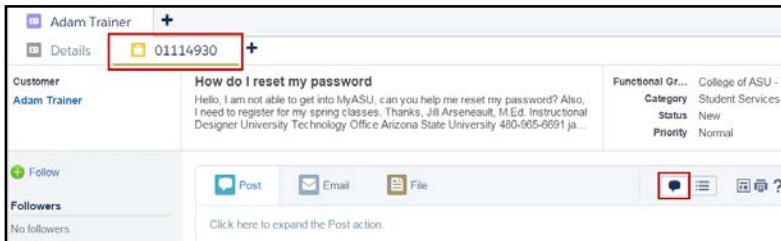


2. From the Contact Details you can review:
 - a. Previous Cases
 - b. Contact Opportunity – Student Recruitment Record
 - c. Notes & Attachments



Case Feed

1. To access the Case Feed, click on the Case Feed icon.



2. From the Case Feed you can:
 - A. Write a Post
 - B. Send an Email
 - C. Attached files to the Case
 - D. Review All Updates for this case

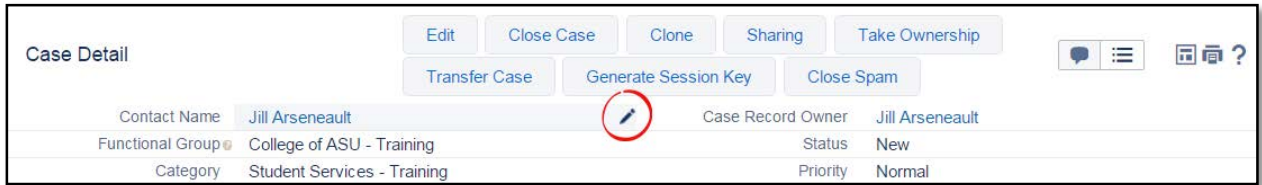


Reassign the Case to a Contact

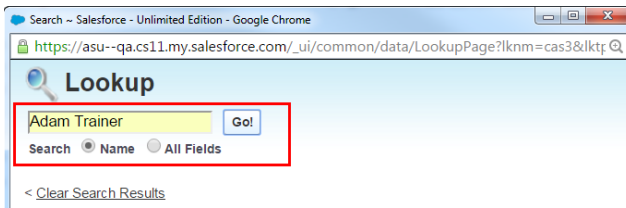
1. Click the **Details** icon.



2. Hover over the Contact Name and Double Click on the Pencil icon



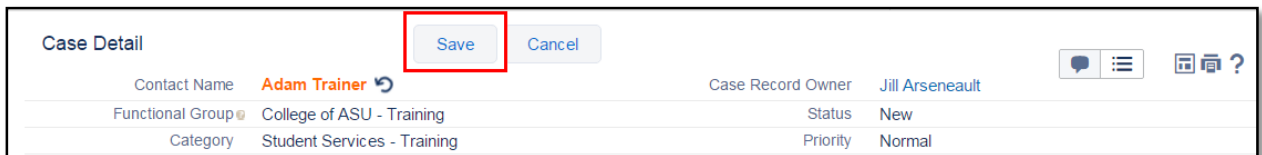
3. Search for your Student by email, First & Last name, ASURITE, or EMPLID (remember the *), then click Go!



4. Click on the Name



5. Click Save

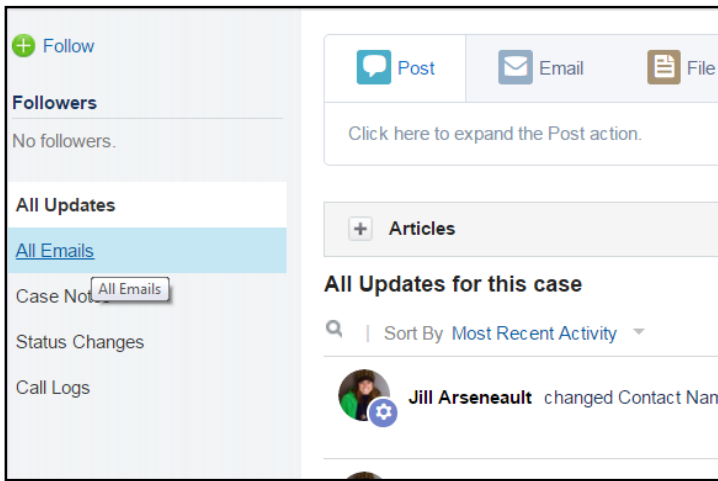


Reply to an Email

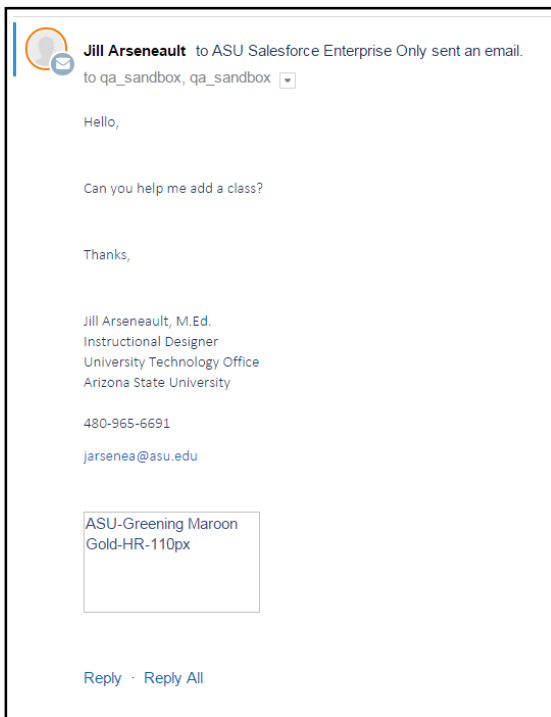
1. Click on the Case Feed icon



2. In the left menu, Click on All Emails



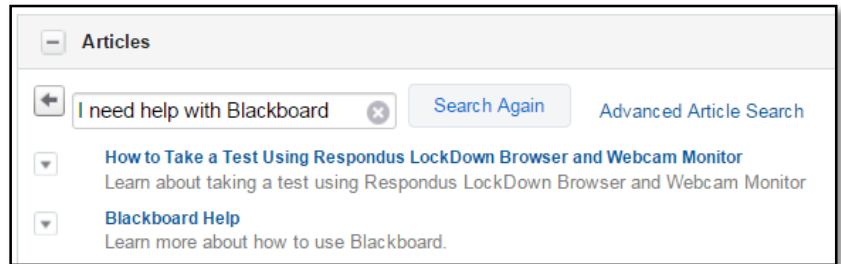
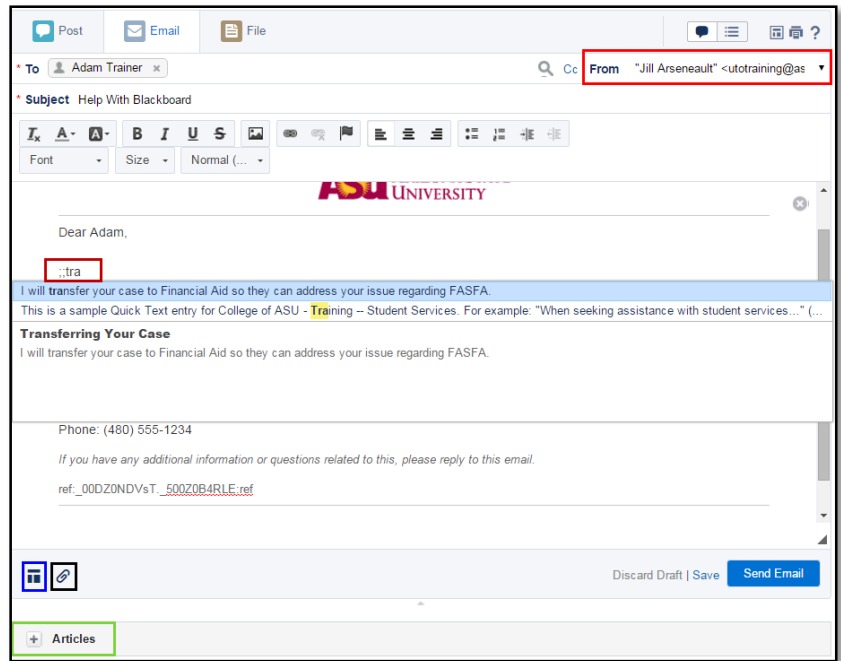
3. Scroll down on the screen to reveal the original email the student sent and open it.



4. Click Reply or Reply All

About the email:

- **FROM:** Needs to have your alias.
- **Quick Text** – Is activated by two semi colons (;;) then your department’s key word or phrase. (i.e. library, financial)
- **Templates** – Click the templates icon to display a list of templates. Select the template for your department.
- **Documents** – Click on the paper clip icon to attached documents from your local drives.
- **Articles** – Click on the + sign next to Articles to see a list of Knowledge Base Articles that are relevant to the subject line of your response to the customer.
- Click **Send Email**.

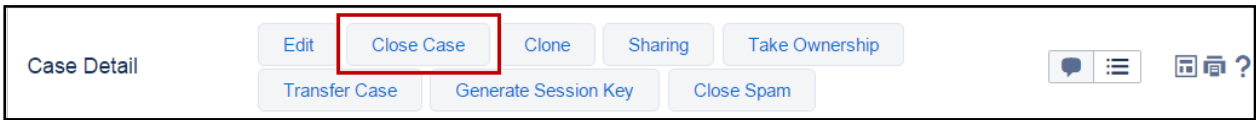


Resolve a Case

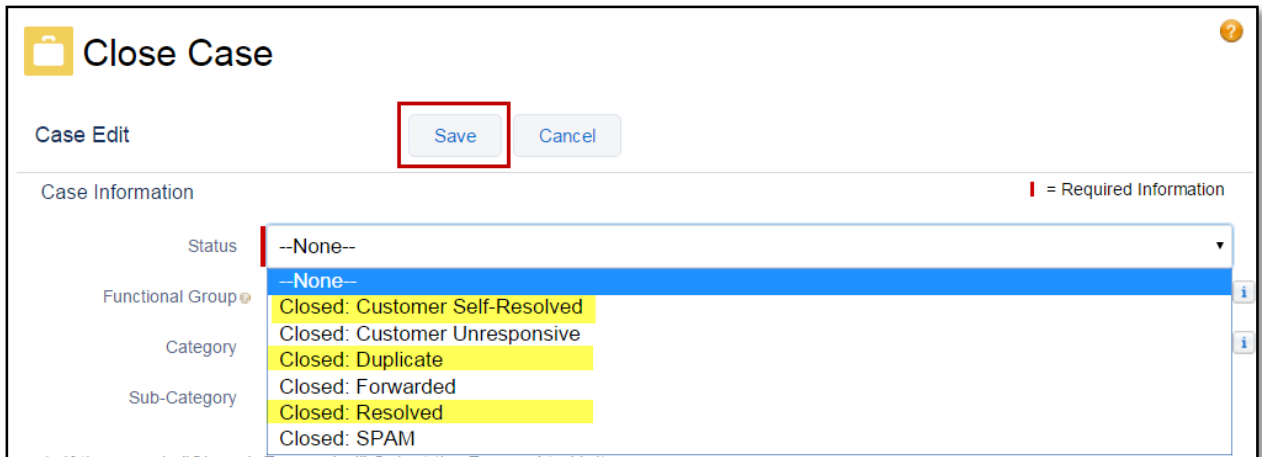
1. To resolve the case click the **Details** icon.



6. Click **Close Case**.



7. Change status to
 - a) **Closed: Customer Self-Resolved**
 - b) **Closed: Duplicate**
 - c) **Closed: Resolved**



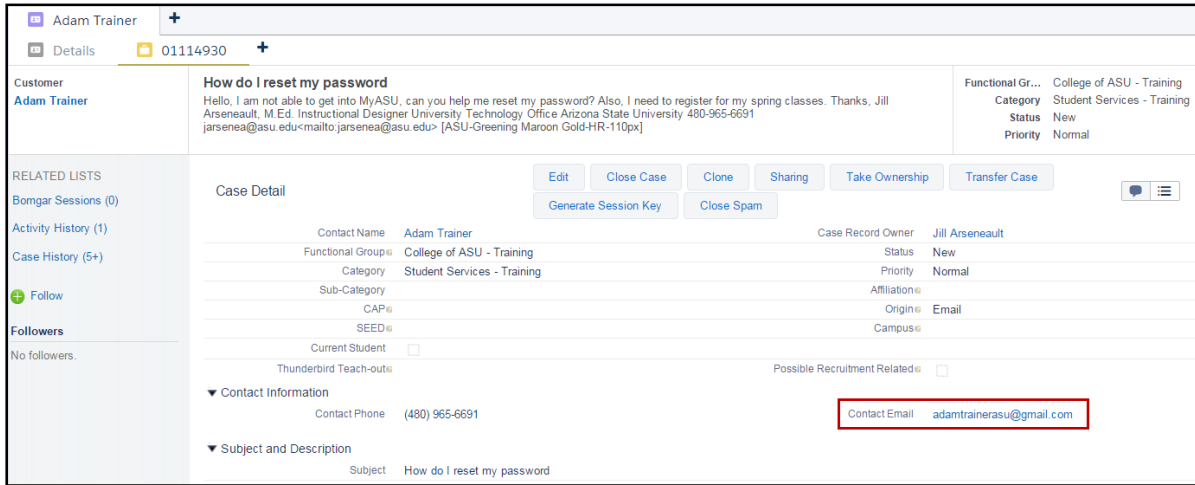
8. Click **Save**.

Notes: Resolution time is expected to be less than or equal to 2 business days.

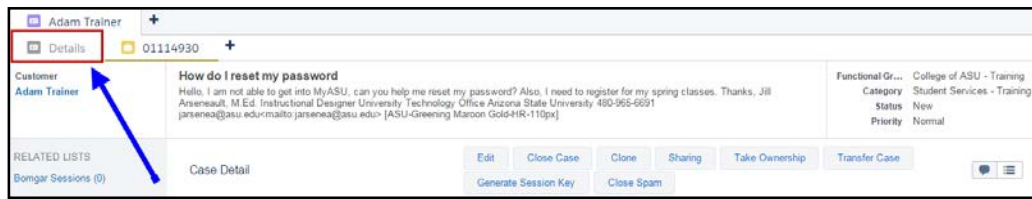
Manage Contact Records

You receive a case from a non-ASU email, thus validation of their identity needs confirmation. Use your business processes to verify the identity of the student.

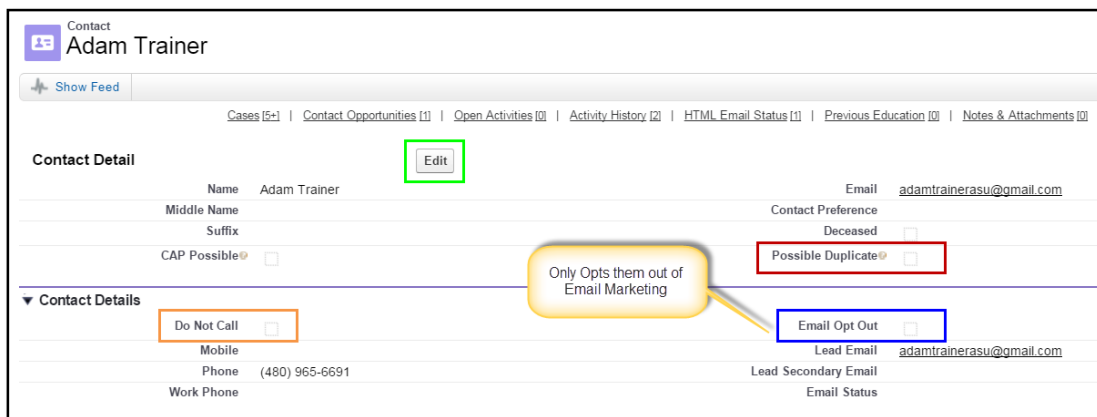
1. When you open a case you see that the email address is a non-ASU address.



2. Click on the Details tab to see the Students Contact Details page.



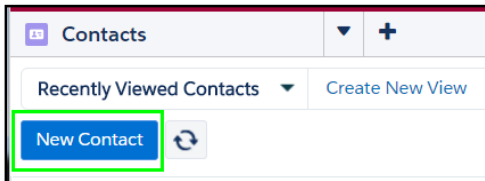
3. You can edit several items on the Contact Record, most important are:
 - a. Marking the record as a possible duplicate
 - b. Marking the record as a Do Not Call
 - c. Opting the record out of Email Marketing



Creating a New Contact Record

Note – Only create a New Contact Record if no matches are found for the name of the student or customer you are looking for.

1. Change the Object to Contacts
2. Click on New Contact



3. Complete the required fields and provide as much information about the student or customer.

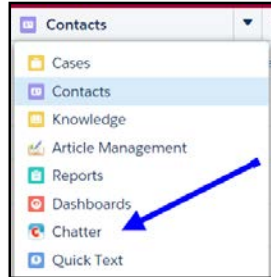
A screenshot of the 'Contact Edit' form. The form is divided into three main sections: 'Contact Information', 'Contact Details', and 'Address Information'. Each section contains various input fields for text, dropdown menus, and checkboxes. At the top right of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'. A red exclamation mark icon indicates required information. The 'Address Information' section includes a link to 'Copy Mailing Address to Home Address'.

4. Click **Save**

About Chatter

Chatter is ASU Connections collaboration application that helps you connect with people and share business information securely and in real time.

To access Chatter click on the Objects drop-down list and click on Chatter.

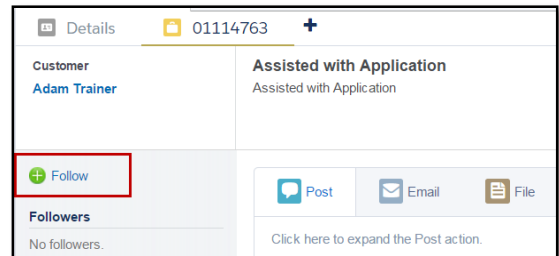
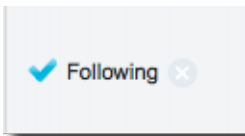


With Chatter, you can:

- Find and follow people in your ASU Connections organization.
- Follow records to see changes to those records in the Chatter feed on your Home tab and Chatter tab.
- Receive email notifications when activities happen in Chatter.
- Bookmark a post that interests you and receive email notifications when someone comments on that post.
- Update your status so people can see what you are working on.
- Post a file or a link to share with other people.

Chatter is a way to collaborate with your team on case questions or updates. You can form groups, follow cases, and add comments or questions to cases that aren't in your Unit or Team.

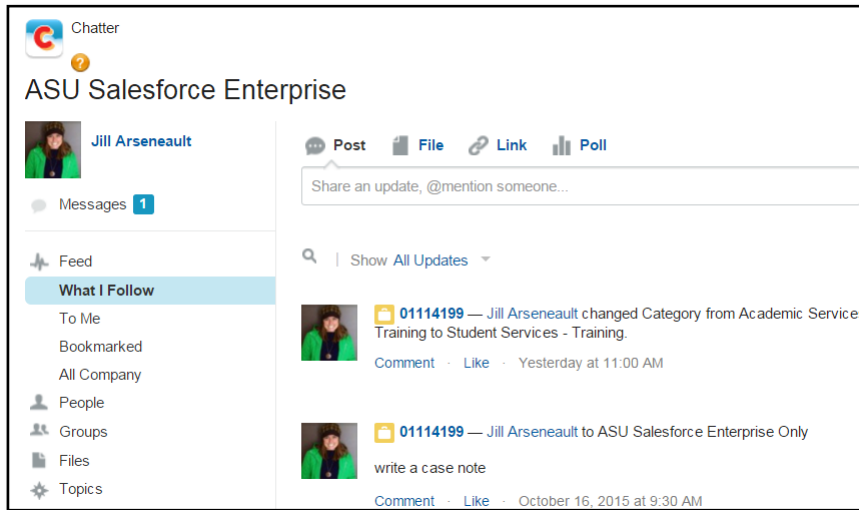
- Click Follow from either the Feed View or the case Detail View of a case.
- It will change to a check mark to indicate that you are now following the case.



- You can also follow from the Case List View and the + will change to a checkmark.

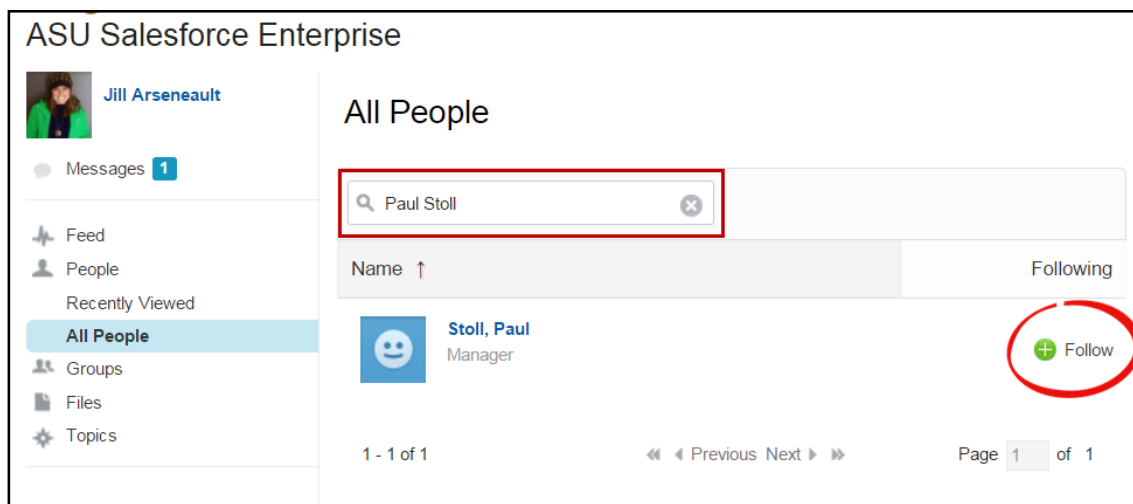


- All updates to a case will be listed in your “What I Follow” area.



Following People

Follow people to see updates in your Chatter feed including posts, comments, and likes. To follow a specific person within ASU Connections, you can find them using the Global Search or select the ASU Connections Chatter app and navigate to the People tab. You will find a list of People who are users within ASU Connections. To follow a person, click the green plus sign. It will add the person to your Chatter feed. This Feed is called “What I follow.”

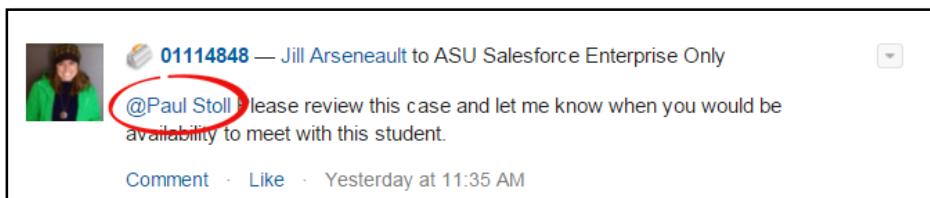
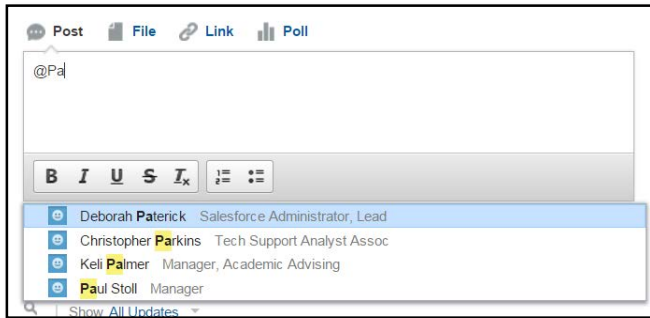


Once you follow people, you see their posts, comments, and likes in your Chatter feed. You can follow maximum combined total of 500 people, topics, and records. To stop following a person, hover over the person’s name and click blue X button next to Following. When you stop following a person, you don’t see future updates from that person in your Chatter feed.

Mentioning People

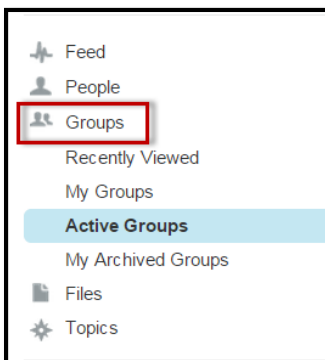
To mention a person, type @FirstName LastName to highlight a user. This will ensure that the comment is sent to the person. After you post the comment, the person's name becomes a link to their profile. When you mention a person your post appears in the person's To Me Feed. Chatter also sends an email notification to the people you mentioned.

If you want to bookmark a post you want to locate again, click on the “Bookmark” dropdown menu choice in the right corner of the post.



Groups

Groups let you collaborate with specific people. These groups can be either Public or Private. Public groups allow anyone in our ASU Connections org to view the posts, comments, or files. However, only members can post, comment, or add files. Private groups only allows group members to view, post or comment in the group. People will need to be invited to the group to join or asked to be added by the group owner.

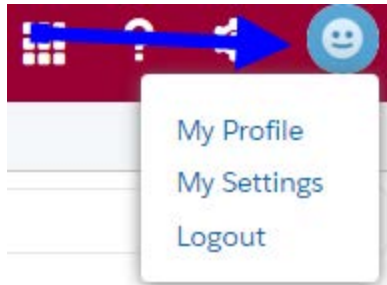


My Profile & Settings

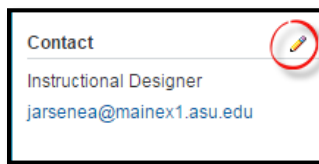
Updating My Profile

Your user profile shows you how other people see you in ASU Connections.

To update your profile, click on the smile icon in the upper-right corner of the web browser. A drop-down menu will display three options. Select "My Profile."



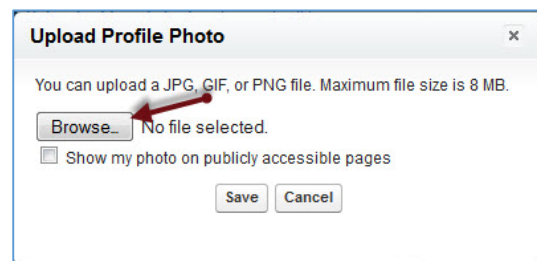
On the left side, you will find an area for your contact information labeled Contact. Click on the pencil icon to edit this area.



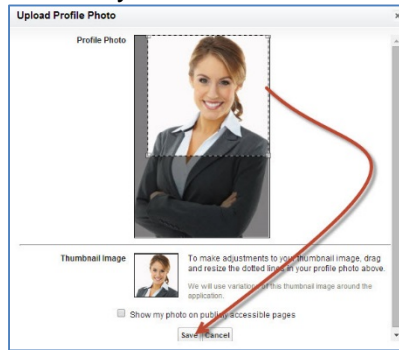
Click the **Save All** button in the pop-up window when you are finished

Adding a Photo

1. On the left side of the page, hover over the smile icon and click on **Add Photo**.
2. To add your photo, click on the **Browse...** button to select a file from your computer.
3. Once your photo file has finished uploading, you will see the name listed. Click on the **Save** button to keep this photo.



4. A preview of the photo will display. Move the dotted lines to adjust the thumbnail preview. Click the **Save** button when you have finished.

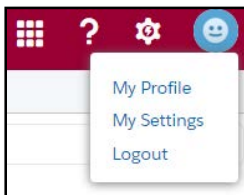


5. If you are satisfied with your photo, then the task is complete. If you would like to change your photo, then hover over the picture and select **Update**. Follow the previous steps to upload a new photo.



Updating My Settings

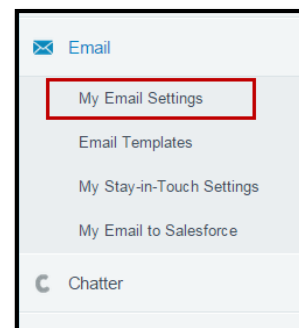
Click on your name in the upper-right corner of the web browser. A drop-down menu will display three options. Select **My Settings**.



Update Sender Email address

This is the address you would like to define when sending email inside of Salesforce. The recipient will respond to this email address for replies to your messages.

1. Click on **Email** then **My Email Settings**.



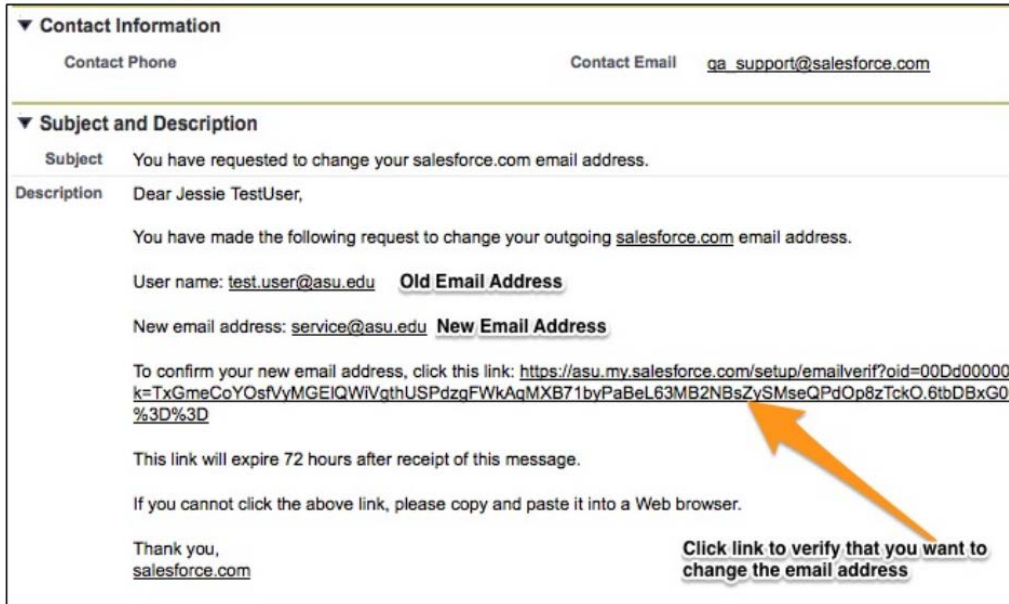
- In the Outgoing Email Settings, set the default email you want to use as your return address, such as your college or department alias. Click **Save**.

- You will see a pop-up message that will explaining that you will receive an email to confirm this change. Click **Ok** to continue.

- Access the All Open Case list view. Look for an incoming case from QA_SUPPORT@salesforce.com. It will contain your change of email verification. The subject will be: You have requested to change your salesforce.com email address.
 - Open the case

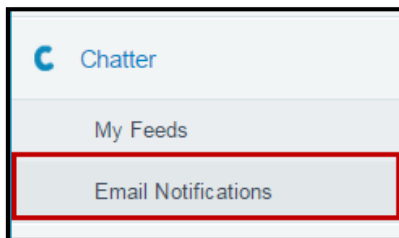
Action	Case Number	Contact Name	Subject	Status	Priority
<input type="checkbox"/> Edit	00445305	QA_SUPPORT@salesforce.com	You have requested to change your salesforce.com email address.	New	Normal

- Verify that the new email address is listed correctly. If it is correct, click on the link to confirm the change.

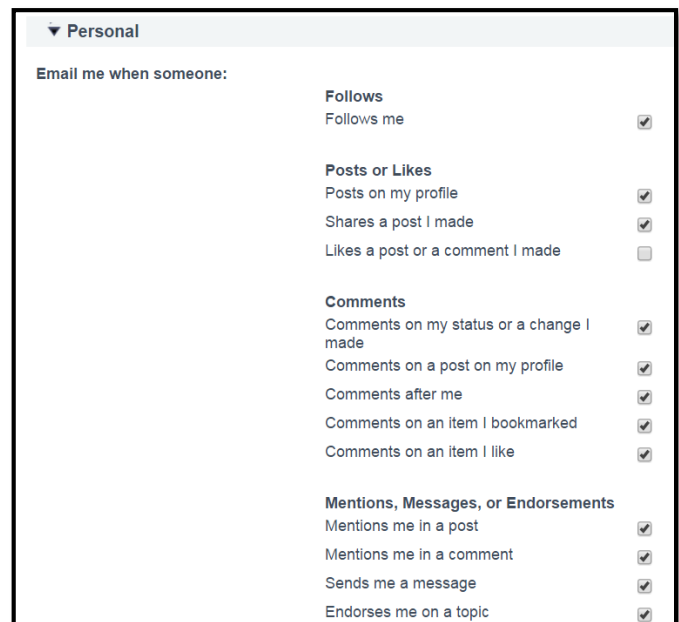


Manage your Chatter notifications

To manage your Chatter notifications click on Chatter in the menu on the left side of the page.



- Make any adjustments to your Chatter email preferences but do not turn all of the notifications off.
- Be sure to click Save.

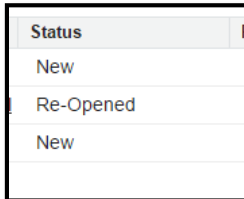


Additional Resources

Reopen a Case

There are only 3 ways a case can be reopened.

1. If a student or customer replies to an email within 14 days of the case being closed – the status will be changed to Re-Opened



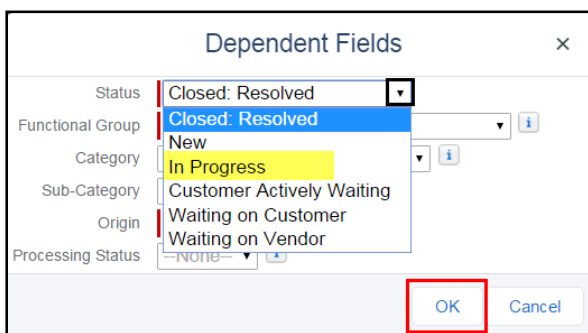
2. If the student reopens the case from within ASU Service Center
3. If you manually change the status to In Progress

Closed Case:

1. Double Click on the pencil to open the Status Field

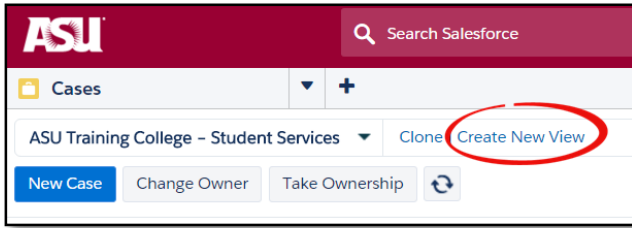


Click In Progress and Ok

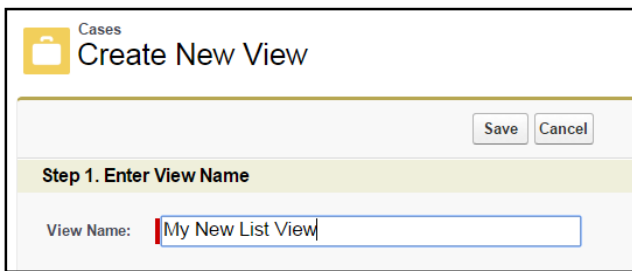


Create your own list of cases

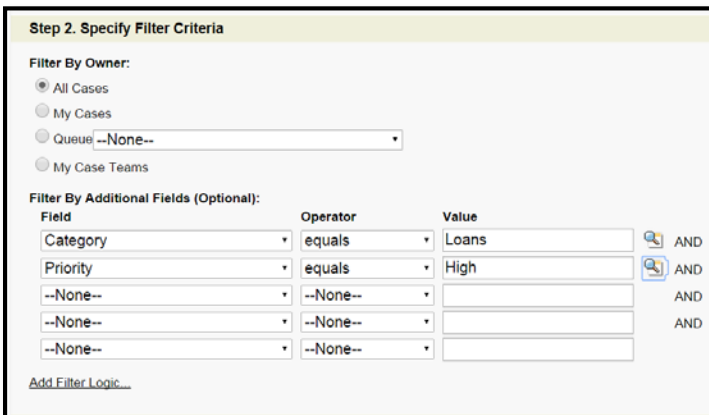
1. Click on *Create New View*



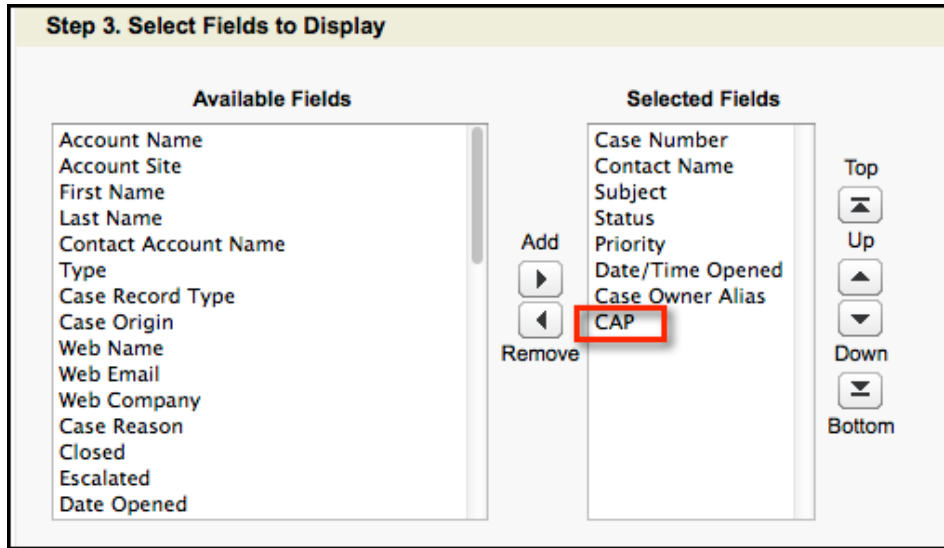
2. Give your new list a name



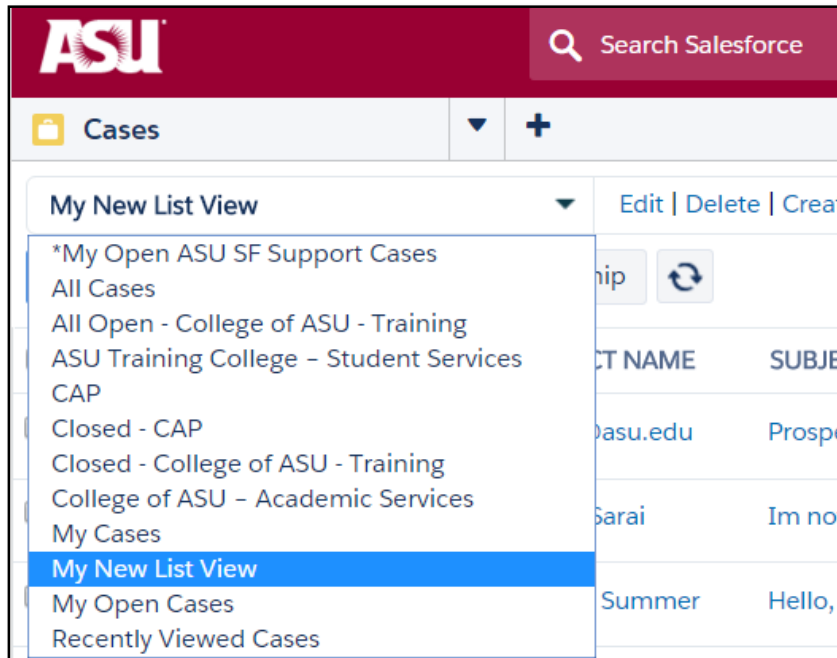
3. Specify the filters



- Select the columns to display. Click Save.

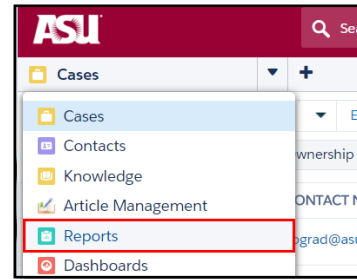


- The new list will appear in the Case List View.

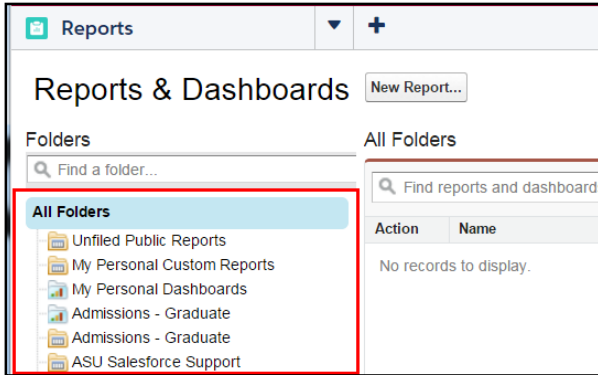



How to Run a Report

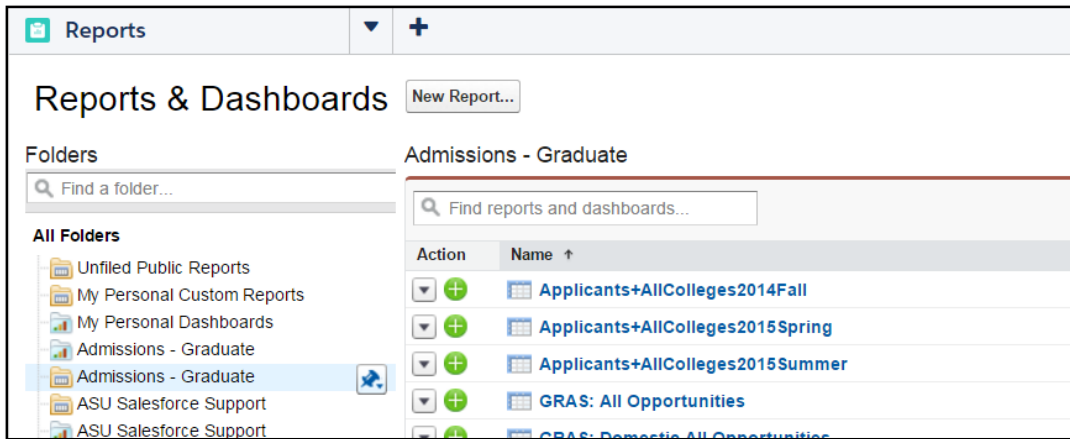
1. In the Objects Dropdown, **Click** on Reports in the menu.



Note: All Reports and Dashboards will be found in a Folder.



2. Each folder with this icon  contains reports. **Click** on the folder that relates to the information you want. You can also search to find a folder.
3. When you click on a folder, you will see a list of the reports on the right panel.



* If you do not have access to see the data in the Report you will receive a message of Insufficient Privileges.

4. **Click** on the name of the report you want to run, then **click** Run Report.



5. The report results will display in the lower panel.

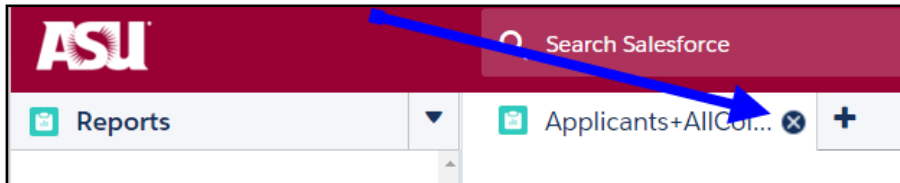
Run Report Hide Details Customize Save As Subscribe

Filtered By:
Opportunity Stage equals Applicant,Admitted,Enrolled Clear
 AND **Term: Term Name** equals 2014 Fall Clear
 AND **College: Program Code** equals GRAS,GRBA,GRCS,GRES,GRGC,GRHI,GRLA,GRLS,GRND,GRNH,GRNU,GRPP,GRSU,GRTE,GRTS Clear

Grouped By: College: Program Name
 Sorted By: College: Program Name ↑

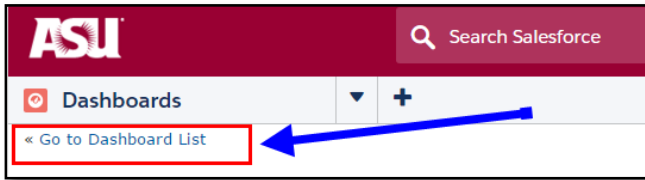
Full Name	EMPLID	Academic Plan: Plan Code	Academic Plan: Degree Search Name	Stage	Application Date	Application Number	Mailing Country	Country of Citizenship: Country Name
<input type="checkbox"/> College: Program Name: <u>College of Letters & Sciences</u> (87 records)								
Samantha Wickham	██████████	EDCOUNMC	Counseling (MC)	Enrolled	1/15/2014	██████████	United States	United States
Devan Briggs	██████████	EDCOUNMC	Counseling (MC)	Enrolled	1/15/2014	██████████	United States	United States


6. **Click** the **X** in the Tab when you are done viewing the report or to return to the list of reports.

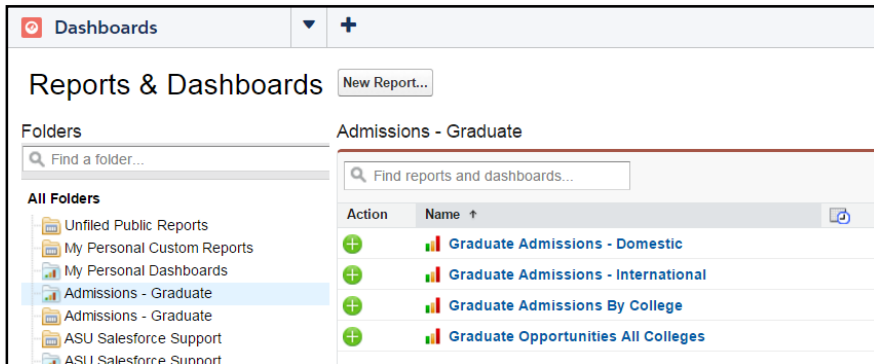


How to View a Dashboard

1. In the Objects Dropdown, **Click** Dashboards.
2. Click on << Go to Dashboard List

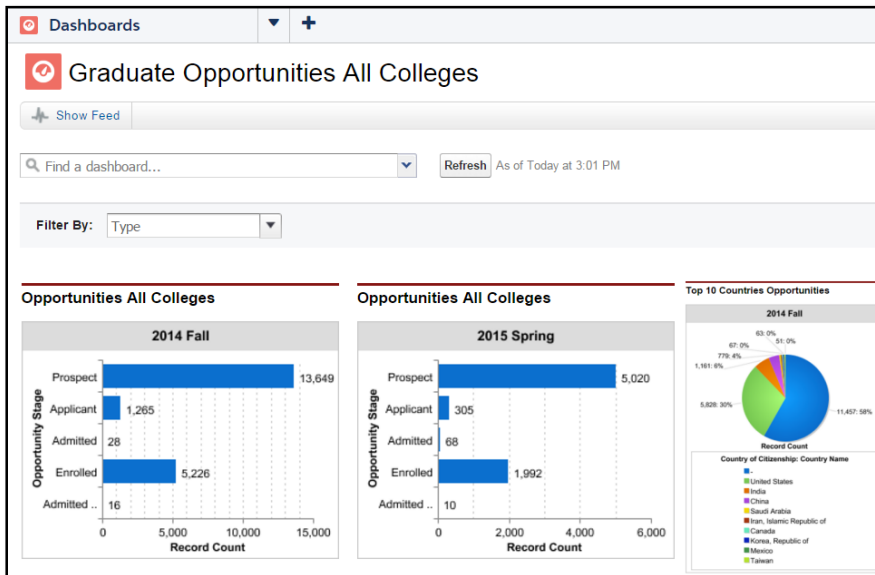


3. On the left you see all folders. Each folder with this icon  contains dashboards. **Click** on the folder that relates to the information you want. You can also search to find a folder.
4. When you click on a folder, you will see a list of the dashboards on the right panel. **Click** on the name of the Dashboard you want to view.



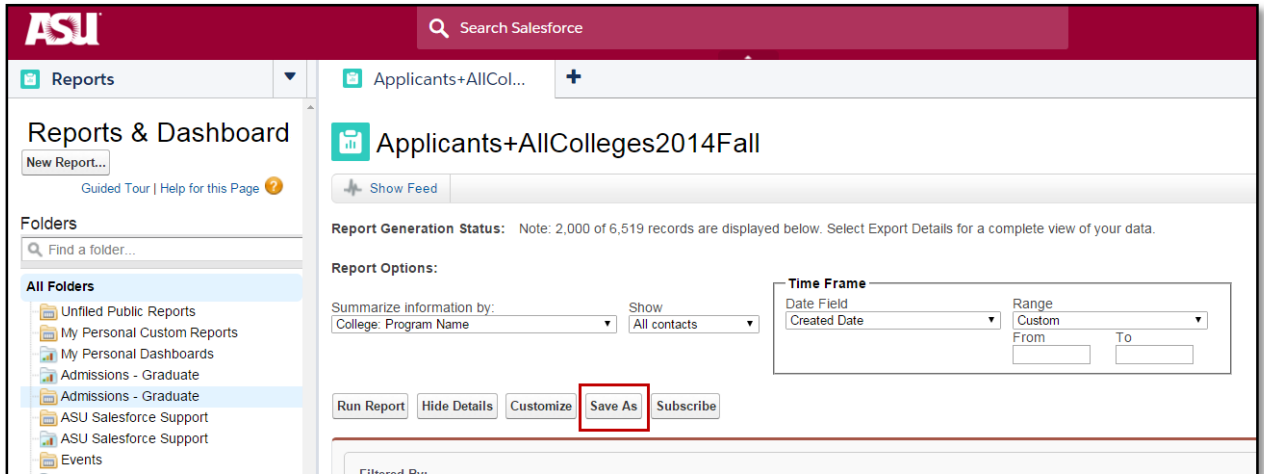
* If you do not have access to see the data in the Dashboard you will receive a message of Insufficient Privileges.

5. **Click** on one of the dashboard to display the report that is running behind it.

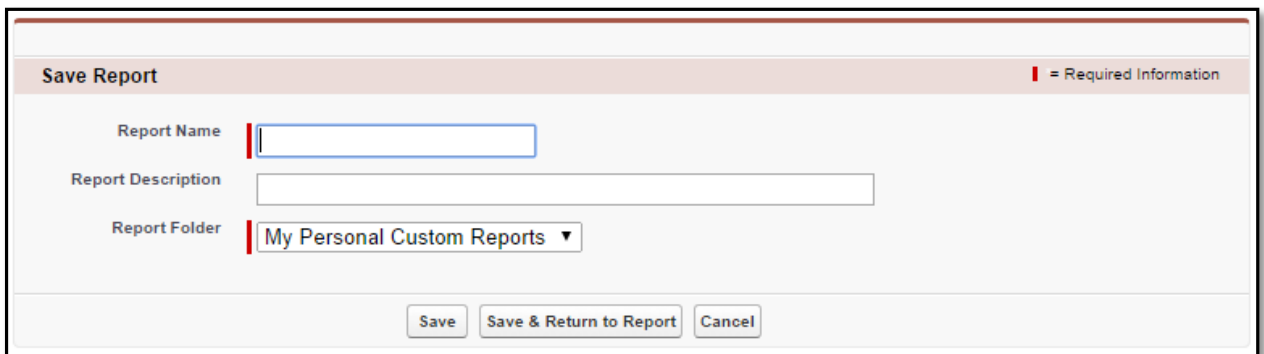


How to Modify & Customize an Existing Report

1. To modify or customize a report in Salesforce you must first save a copy of the report.
2. Follow Steps 1 – 4 in How to View a Report.
3. **Click** on the name of the report you want to modify or customize, then **click** Save As.

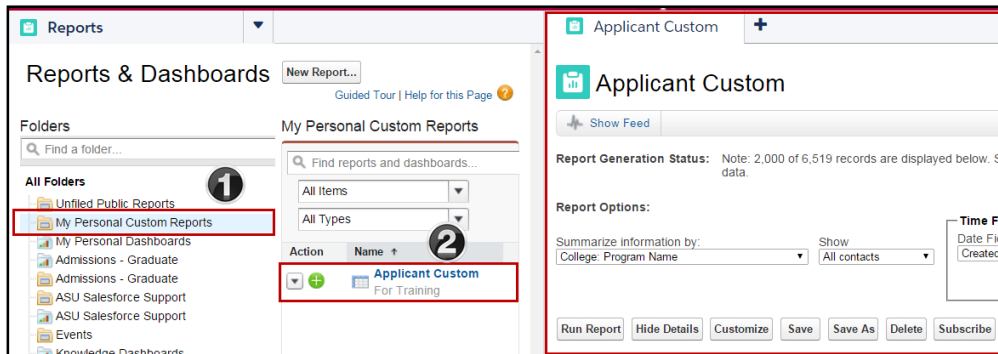


4. Name the report, then select **My Personal Custom Reports** for the Report Folder.

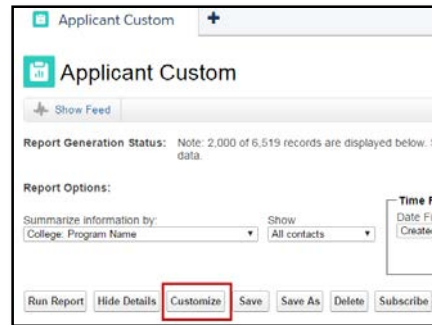


5. Click Save

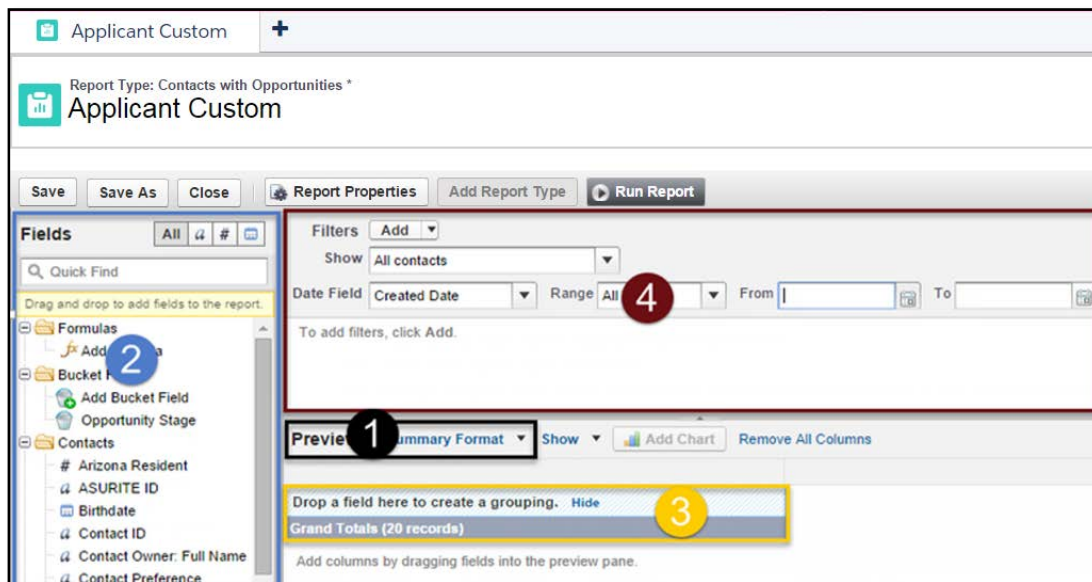
- You Saved Report will open.
(To access the saved report, **Click** on My Personal Custom Reports under All Folders. **Click** on your saved report.



- In your report, **Click Customize**.

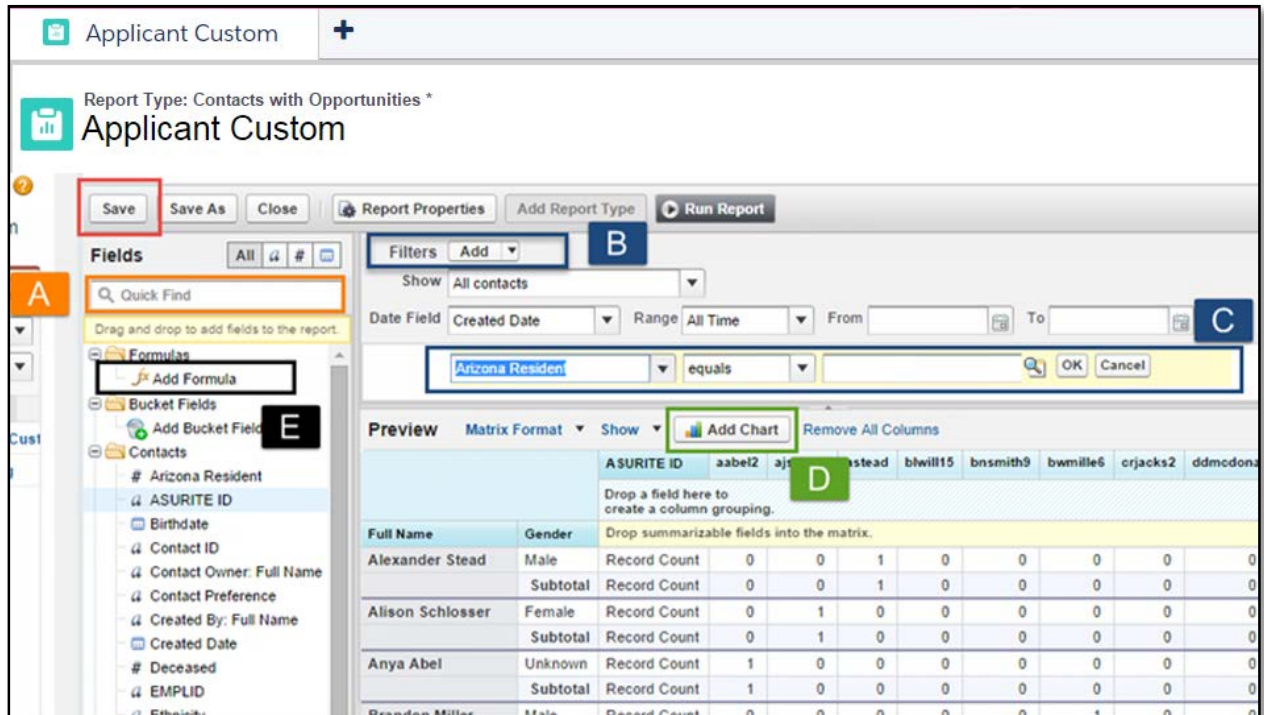


- The customize pane can be broken up into 4 zones.



- Zone 1 Preview – Change the format of your report from Summary, Matrix, Joined or Tabular
- Zone 2 Fields – Select specific elements of the data you want to display in your report
- Zone 3 Field drop – The location where you drop the fields of data
- Zone 4 Filters – All the possible ways you can filter the data.

9. Modification/Customizable Options



- A. Use **Quick Find** to hone in on the fields you want. Then drag and drop them into the drop zones.
- B. Filters can be added or removed. To add a filter, **Click** add next to Filters. From the pull-down you can choose field filters: filter logic or cross filter. Click help me choose if you do not know the filter you want. To remove Filters, hover over the existing filter and click remove. You can **click** edit to change the existing filter.
- C. Define your Filter
- D. Add a Chart - Represent your data visually by adding a chart to summary, matrix, and joined reports. The chart builder makes it easy.
- E. Add formulas to your report by double-clicking or dragging them to the preview pane. Click and drag filter from list to add fields to the report.
- F. Remember to **SAVE** your changes to your newly customized report.

*Depending on your access level in Salesforce, you will be able to view some of the reports.

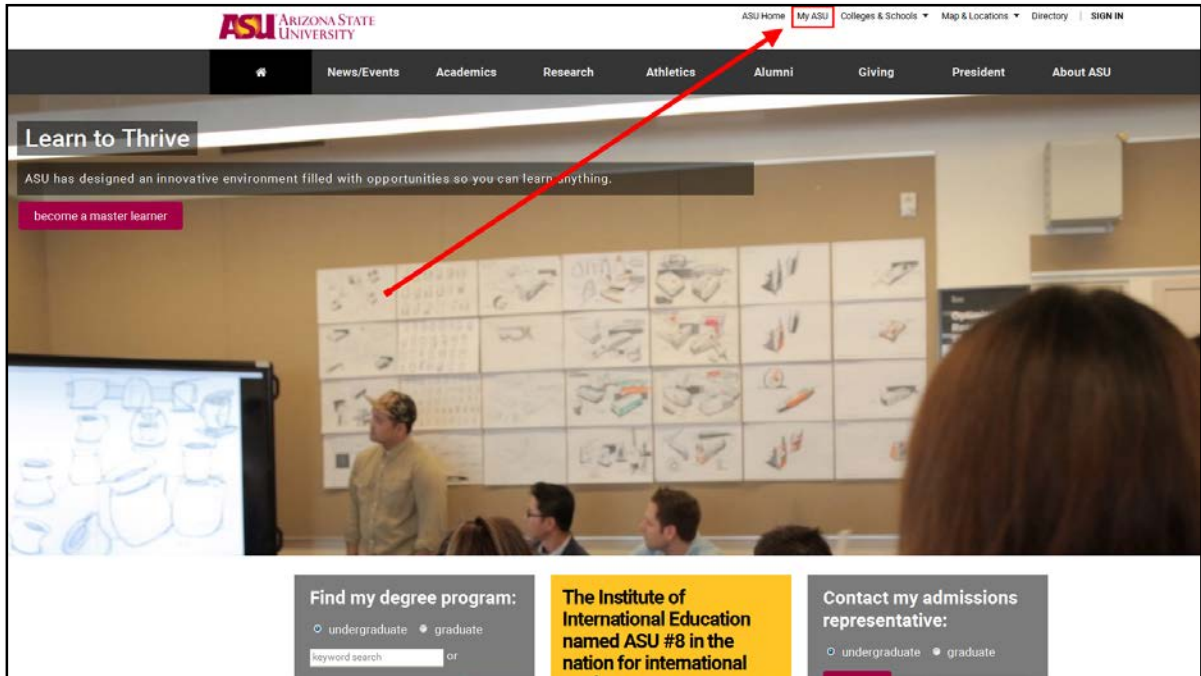
*Users cannot create new reports but they can customize existing reports to fit specific needs.

How to log into Salesforce Production with ASU Single Sign-On (SSO)

ASU uses single sign-on (SSO) to access many applications and systems on the ASU domain, including our Customer Relationship Management system known as Salesforce. Once you sign into My ASU, you can access Salesforce directly from the [My ASU](#) homepage.

To access Salesforce from the ASU homepage, perform the following steps:

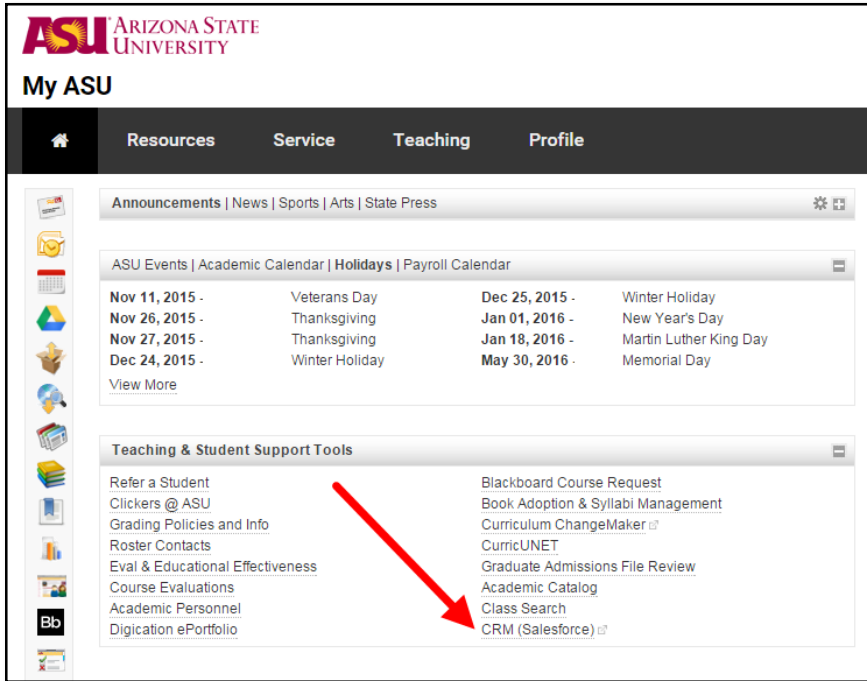
1. From <http://www.asu.edu>, click on **My ASU**.



2. Type your ASURITE ID and password in the provided fields and click **Sign in**.

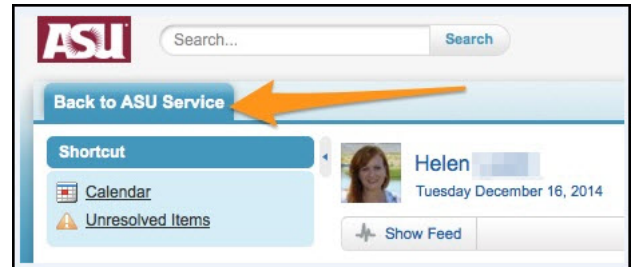
A screenshot of the ASU Sign In page. At the top, there is a banner for 'Walk-Only Zones make your campus trips safer. walk.asu.edu' with icons of a person walking and a person pushing a stroller. Below the banner is the 'Sign In' heading. The form contains two input fields: 'ASURITE User ID:' with a placeholder 'Your ASURITE ID' and a link 'Activate or Request an ID'; and 'Password:' with a placeholder and a link 'Forgot ID / Password?'. Below the fields is a 'Sign In' button and a checkbox for 'Remember My User ID'. At the bottom, there is a link for 'Need Help? Visit the Help Center or call 1-855-ASU-5080 (1-855-278-5080)' and a footer with links for 'System Status', 'ASU Home', 'Copyright', 'Acceptable Use', and 'Privacy'.

- Under the Teaching & Student Support Tools section, click **CRM (Salesforce)**.



Salesforce will open for you.

- From the Salesforce Home Page, you can get to your cases by clicking **Back to ASU Service** in the upper left corner.



Note: As an alternative method to logging into Salesforce, you can access the site directly by going to <https://salesforce.asu.edu> and logging with your ASURITE ID and password.

Want More Training?

Please visit the UTO Training site at <http://links.asu.edu/utotraining>, then click on ASU Connections Training in left margin to find more training documents like this one.