

# CASL SALESFORCE SUPPORT TICKET SUBMISSION GUIDE

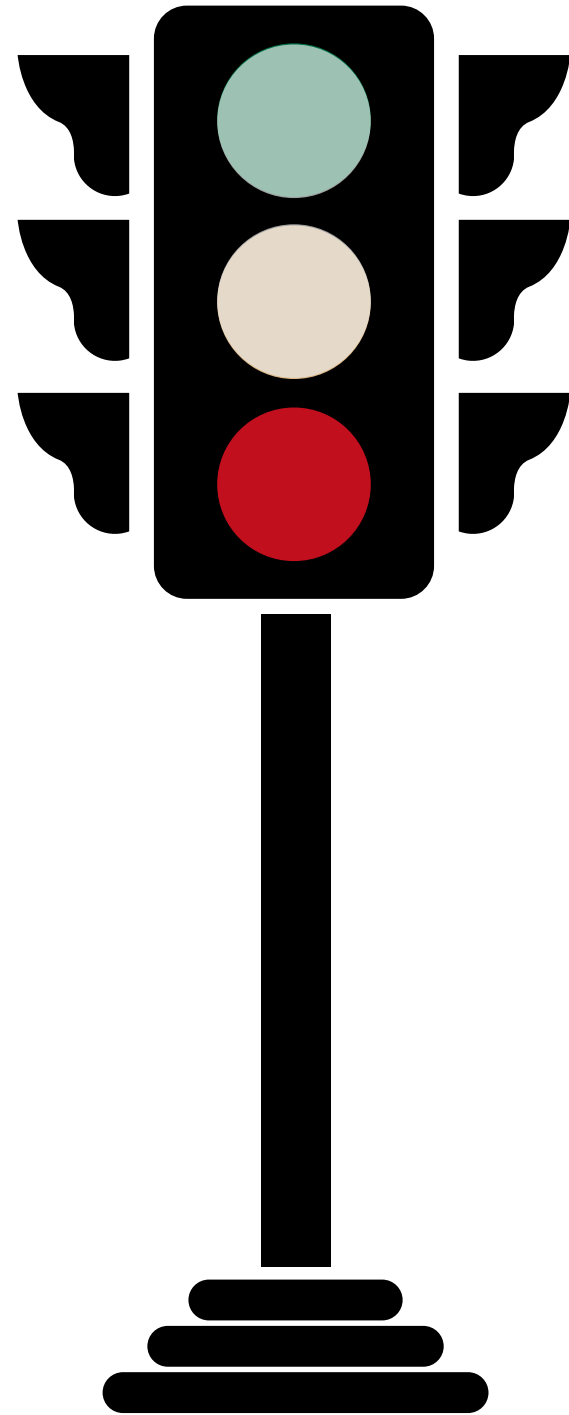
CASL Salesforce Team  
Updates on June 16<sup>th</sup> 2025

# Purpose of This Guide



This guide is intended to help CASL employees understand how to submit support tickets in Salesforce to report issues, request assistance, or suggest improvements. Using this centralized process ensures that all issues are properly tracked, prioritized, and resolved in a timely manner.

# STOP: Do you need to request a Salesforce Account or Moved Departments?



To request a **new** Salesforce User License or have moved departments, please fill out an Asana ticket

[Salesforce Access and Change Request](#)

# Who Should Use This Guide



All CASL employees who use Salesforce in their day-to-day work, and who encounter system problems, permission problems, or need general support with Salesforce.

For other department requests:

Marketing and Communications

<https://form.asana.com/?k=AeYllpxm8PSnvl6YViegEQ&d=74068311365438>

Facility Department

<https://caslfacilities.hesk.com/>

IT Department

<https://caslit.hesk.com/>

Advancement Department

<https://casldev.hesk.com/>

# What Types of Issues Can You Report?

Error Type	Issue Category	Example	Estimated response time
<b>System Issues</b>	Error messages	<i>"When I try to convert a volunteer applicant lead, I got an error, I'm not sure if the conversion is succussed or not." "When I try to save a record, an error pops up saying 'We hit a sang, please review the errors on this page'"</i>	up to 2 weeks
	Pages not loading or loading incorrectly	<i>"I clicked 'New' button on Recurring Donations page, but the page is tuck on a spinning wheel and never fully loads."</i>	approx. 1 to 3 business days
<b>Access &amp; Permissions</b>	Cannot access a specific object, record, or field	<i>"I got an 'Insufficient Privileges' error when trying to edit a contact."</i>	approx. 1 to 3 business days
	Missing tabs or menus	<i>"I cannot see 'Campaign' tab in my Salesforce navigation bar"</i>	approx. 1 to 3 business days
	Role-based access issues	<i>"As a manager, I want to see my team's client information, but I can only see my own."</i>	approx. 1 to 3 business days
<b>Data Issues</b>	Incorrect data appearing in reports	<i>"I opened a report, but there is no data appeared"</i>	approx. 1 to 3 business days
	Records not syncing or displaying wrong values	<i>"I got notification that someone submitted volunteer application form, but I can't find it in Salesforce"</i>	approx. 1 to 3 business days
	Duplicate or missing records	<i>"I searched a client - Xiao Zhang, but I found multiple Xiao Zhang, which one I need to use? Can I combine all Xiao contacts into one record?"</i>	approx. 1 to 3 business days
<b>Feature Requests / Enhancements</b>	Request to automate a manual task	<i>"Can we automatically send a follow-up email 7 days before the Salesforce task due date?"</i>	up to 2 weeks
	Suggest page layout improvements	<i>"There are many irrelevant fields on Contact layout, can we rearrange them or take them down?"</i>	approx. 1 to 3 business days
	Ask for custom reports or dashboards	<i>"I would like a dashboard that shows program enrollment progression by the client age." "I want to get a report for FY24 donors who donated \$500 and above".</i>	up to 5 business days
	Request to add new features and fields	<i>"I want to use Salesforce to track a special clinic assessment".</i>	TBD by Salesforce Team
<b>Marketing Cloud Support</b>	Request a distribution list in Marketing Cloud	<i>"I want to send thank-you email to all guests who attended our Block Party."</i>	approx. 1 to 3 business days
	Request to create an Email Journey	<i>"I want to send a series of emails introducing CASL to our website new subscribers." "I want to guide users through the process of registering, attending and following up on our next year Gala."</i>	up to 1 week
	Sending Report and Deliverable Issues	<i>"I would like to know the sending performance on our last event invitation email." "Why our email delivery rate dropped below 85%?" "We have this contact in our Salesforce, how can I know if they open the email?"</i>	approx. 1 to 3 business days

# What Types of Issues Can You Report?

You can submit a support ticket for any Salesforce-related issue, including but not limited to:

## For Login & Authentication Issue !!!

- Problem related to signing, password reset and mobile authenticator

*“I forgot my password; Salesforce locked me out.”*

*“I used to login with mobile authenticator, but I bought a new phone, how can I login the Salesforce?”*

**In these scenarios, when you cannot get into Salesforce, please contact CASL Salesforce Team immediately!**

Chrisazil Santos – Lead Business Analyst

Quanpeng Wu – Salesforce Admin

Sibel Eken – Salesforce Admin

# Do NOT Use the Salesforce Support Ticket System for These IT Issues

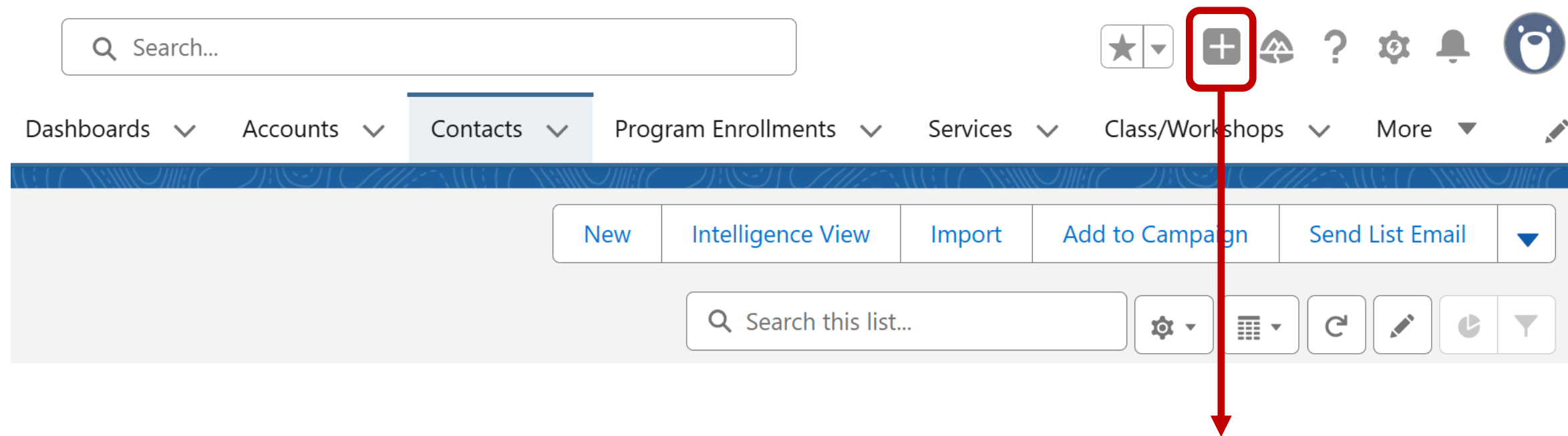
- Email Issues  
*for example: cannot send or receive emails, missing email signature*
- Hardware Problems  
*for example: computer won't turn on, broken keyboard or mouse*
- Network or Wi-Fi Issue  
*for example: VPN not working, slow Wi-Fi*
- Software Installation or Access  
*for example: Need installation of other software, locked out of another platform (not Salesforce)*
- Password or Login Issues  
*for example: forgot Windows password, MFA setup for non-Salesforce account*
- Account Creation/ Termination (Non-Salesforce)  
*for example: requesting new staff computer and email account setup, removing access for departing staff*
- Phone and Voicemail  
*for example: phone number routing problems, voicemail access or setup issue*

# Before You Begin



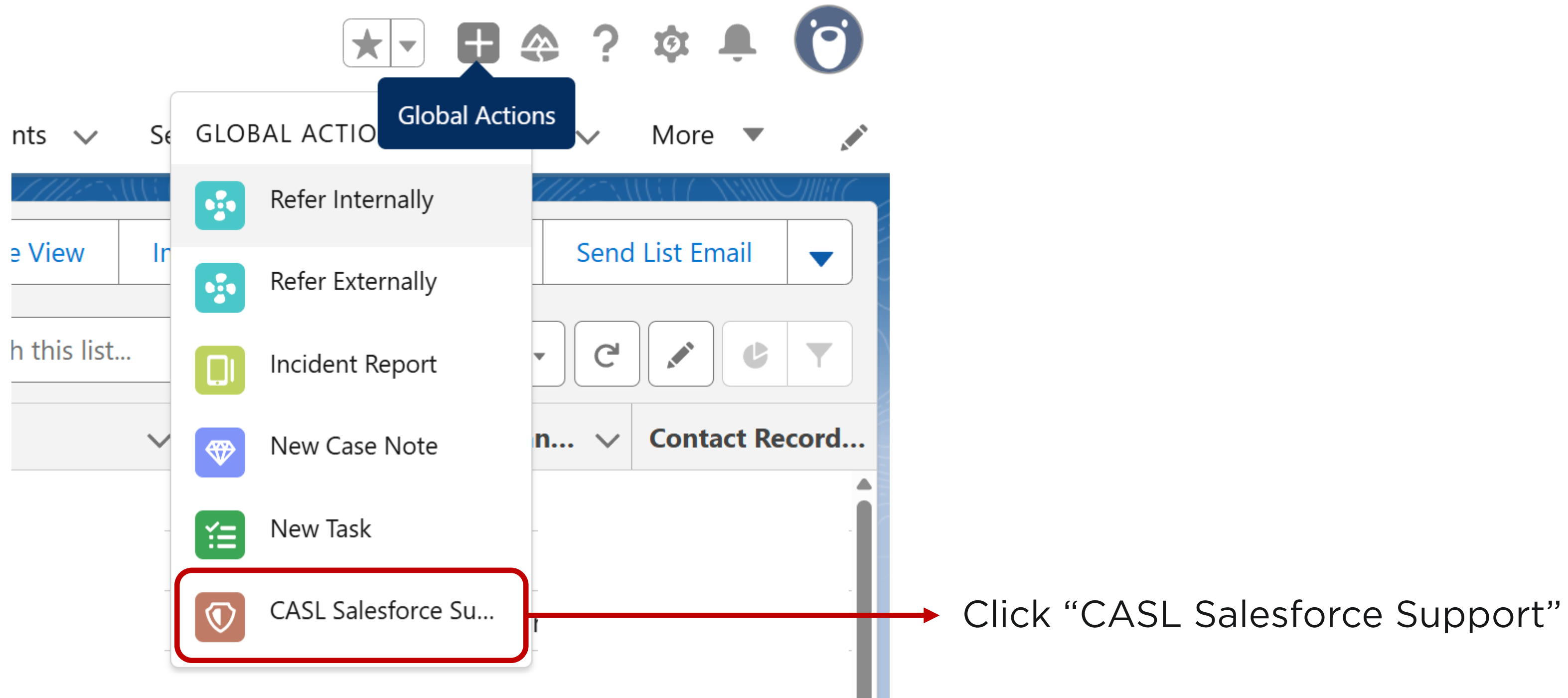
- Ensure you are logged into Salesforce.
- Have a clear understanding of the issue you're reporting.
- Prepare any screenshots or additional context that can help the CASL Salesforce team.

# How to Submit a Ticket (Step-by-Step)



Locate to “Plus” button on your top-right screen and click

# How to Submit a Ticket (Step-by-Step)



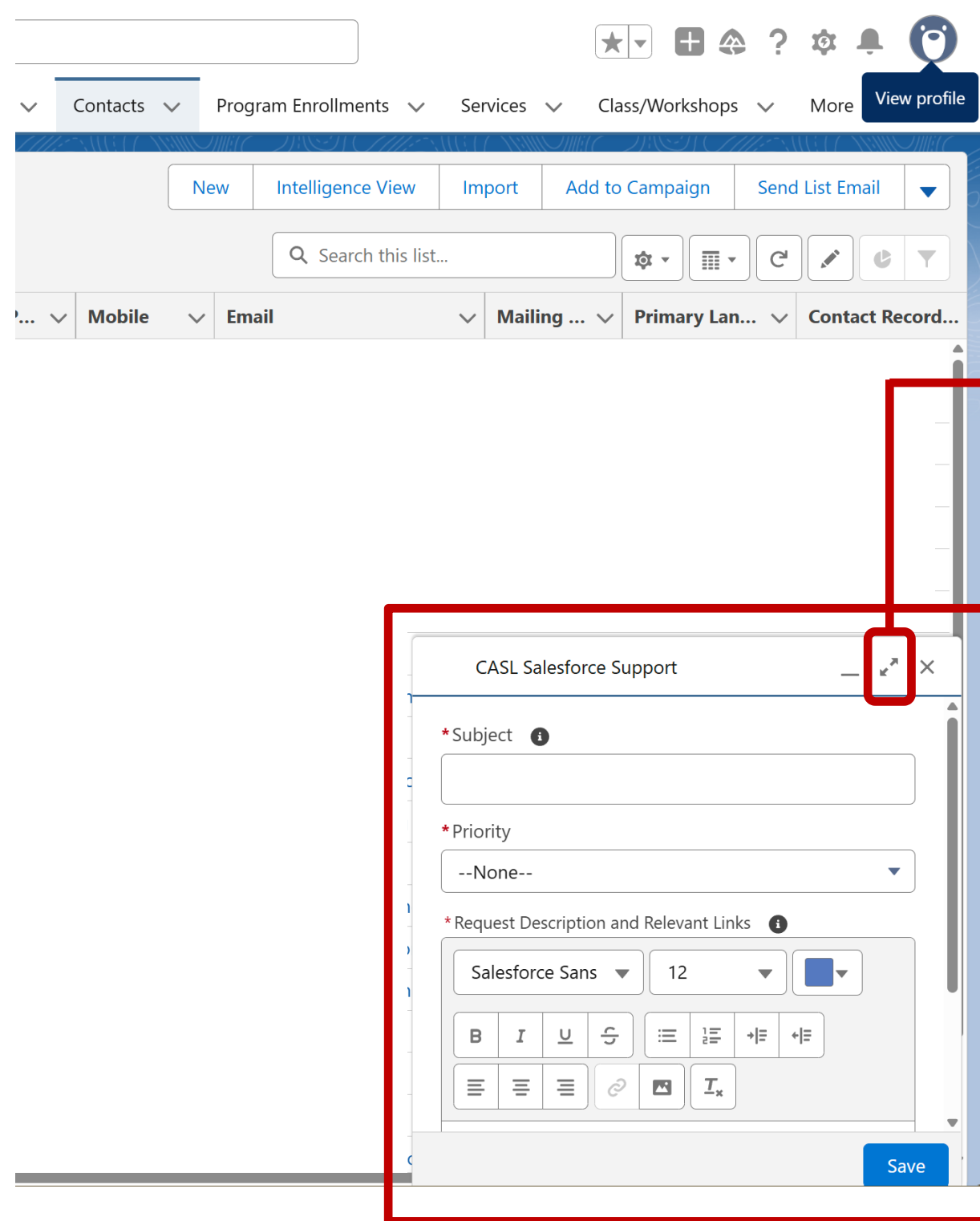
The screenshot shows a software interface with a top navigation bar containing icons for star, add, refresh, help, settings, notifications, and a user profile. Below the navigation bar, a 'Global Actions' dropdown menu is open, listing several options: 'Refer Internally', 'Refer Externally', 'Incident Report', 'New Case Note', 'New Task', and 'CASL Salesforce Su...'. The 'CASL Salesforce Su...' option is highlighted with a red rectangular box. A red arrow points from this box to the text 'Click "CASL Salesforce Support"'. The background of the interface shows a list view with a 'Send List Email' button and a 'Contact Record...' section.

Global Actions

- Refer Internally
- Refer Externally
- Incident Report
- New Case Note
- New Task
- CASL Salesforce Su...

Click "CASL Salesforce Support"

# How to Submit a Ticket (Step-by-Step)



If you think this pop-up window is too small, click the “Enlarge” button

A pop-up window shown on the bottom page; this is where you put your request in

# How to Submit a Ticket (Step-by-Step)

CASL Salesforce Support

\*Subject ⓘ

\*Priority

--None--

\*Request Description and Relevant Links ⓘ

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Save

Please clearly and concisely describe the issue in the subject line.

There are four priorities:

- Low Priority
  - Request is not sensitive
- Medium Priority
  - Request is time sensitive
- High Priority
  - Request needs to be complete today
- Extremely High Priority
  - Service/operations disrupted by this issue

Please note that the CASL Salesforce Team may adjust your ticket priority based on the complexity of the issue and the team's current workload. We will do our best to close High Priority and Extremely High Priority tickets on the same day, but this is not 100% guaranteed.

# How to Submit a Ticket (Step-by-Step)

CASL Salesforce Support

\*Subject ⓘ

\*Priority

--None--

\*Request Description and Relevant Links ⓘ

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Link Image

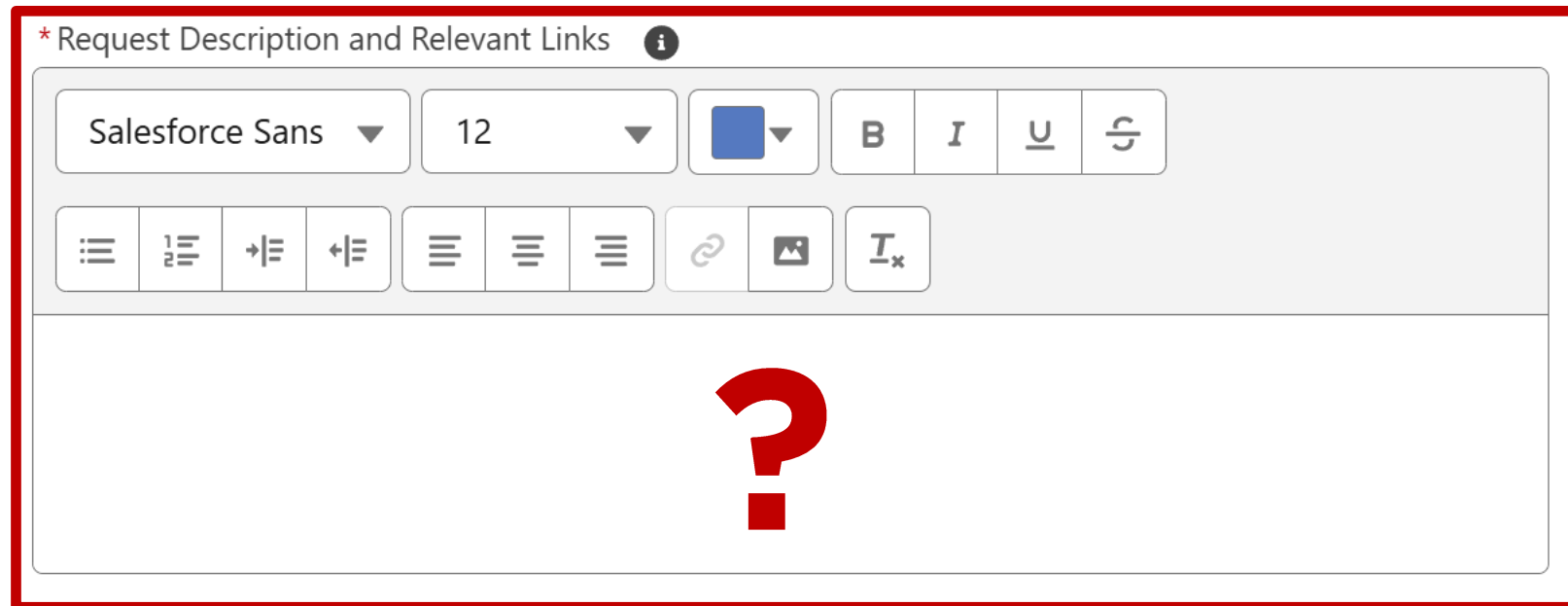
Save

You can use this text area to provide a detailed description of the ticket issue. If this issue is related to a record, please copy record URL and paste here.

To help the Salesforce Team better understand your issue, we strongly recommend using the Upload Attachment and Upload Image tools to include a screenshot of the Salesforce error (if applicable) in your ticket description.

Once you finish drafting, click “Save” button, you will receive a confirmation email

# How to Submit a Ticket (Step-by-Step)



\* Request Description and Relevant Links ⓘ

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## What Should I Include in the Ticket Description?

It's simple — here's what to write depending on your request type:

### If you're encountering an error:

*Please describe in detail the steps you took in Salesforce that led to the error. This helps the team reproduce and diagnose the issue faster.*

### If you're requesting a report or dashboard:

Clearly explain:

*What kind of data you need in the report? Which fields should be displayed?*

*What timeframe the data should cover (e.g., last 30 days, current quarter)?*

### If you're requesting a new field or feature in Salesforce:

Please describe:

*Why you need this field or functionality?*

*If it's a new feature, what you expect it to do.*

*How you imagine it would be used or displayed on the Salesforce page?*

# After Submission - What Happens Next?



- The CASL Salesforce team receives your ticket and triages it based on priority and impact.
- One of the CASL Salesforce team members may reach you via email or Teams
- Once resolved, you'll receive a closure notification.