How to Navigate through Salesforce

- To view the cases that are assigned to your conference, click on the arrow and select your conference from the list. Be sure to check out these same options on each of the Tabs at the top of your screen.

- You may perform a search on any of the tabs by entering the information in the search box. Be sure that the search list is on “All Open Cases”, otherwise you will be limited to searching the items in the list.
- To print out the Case Record Form on a case, click on the Printable View button.

- For assistance on a case: The Call Center will enter the **Amount Requested**. The Caseworker cannot change this amount.
- The Caseworker will enter the **Amount Provided**. If a check request, an email notification will automatically be sent to the Treasurer along with the check amount.