Before creating your first case…

Please add salesforce@ohconnect.org as an email contact to prevent email notifications from going to SPAM. Any email notifications for existing cases will be received from salesforce@ohconnect.org and that is also the address that should be used when replying to an existing case.

> **IMPORTANT:**
> The salesforce@ohconnect.org email address should never be used to create a **new** case. Reason being, if a 'fresh' email is sent to that address, it is likely to get lost in an unmonitored area of the system. The salesforce@ohconnect.org email address should only be used when replying to an **existing** case.

Case Management

1. All cases will be managed via email; there is no online customer portal.
2. **Create a case -** To create a new Salesforce case, email the following addresses for support:
   - **Fiscal Support**: fiscal@ohconnect.org
   - **Library Support**: library@ohconnect.org
   - **Student/EMIS Support**
     o Infinite Campus: icsupport@ohconnect.org
     o PowerSchool: pssupport@ohconnect.org
     o ProgressBook: pbsupport@ohconnect.org
   - **Technical Support**: tech@ohconnect.org

> **IMPORTANT:** Once you have created a *new* case, any **future** correspondence on that *existing* case should be done via an email reply to a case notification (which will arrive from salesforce@ohconnect.org). If instead, you reply to an *existing* case and you use one of the above email addresses under #2, **another new case will be created**.

3. *Case Started* **email notification**: When a new case is created, the customer may receive **two** *Case Created* email notifications. This is expected and is standard across the state for ITCs using Salesforce.

4. **Email notifications**
   a. **Customer Name and Email Display**: Within any case notification, depending upon how your contact record is set up, you may notice that your name and email address are 'duplicated' within the email body. This is expected/standard across the state for ITCs using Salesforce.
   b. **Email notification types:**

> **Case created**:
> - Subject line will be similar to: *Case #00123456 has been started – [Original Email Subject Line]*
> - This notification will only be sent to the customer who sent the email to create the case (i.e. No notification will be sent to any other email addresses that might have been copied on the initial email sent to create the case.)
>
> **Case reply:**
> - Subject line will be similar to the *original email,* unless the sender manually changes it.

> **Case closed:**
> - Subject line will be similar to: *Case #00123456 has been closed – [Original Email Subject Line]*
> - This notification will only be sent to the customer who sent the email to create the case.
> - For any closed cases, there will be a link to submit a survey regarding your satisfaction with the support received on the case.

    c. No email notification will be sent when a case is set to a status of 'In Progress' or 'Hold.'

5. **Attachments**
   - Most standard file types are allowed as attachments; no scripts or executables should be sent as attachments since they will be stripped.
   - 25 Mb file size limit
   - Inline images may be included in the email body.
   - If a Connect staff member sends a communication through Salesforce that includes attachments totaling more than 3 Mb, the attachments will be converted to HTML files that must first be downloaded and opened to reveal a link to download the actual source file.