

Nov. 2022

Case Management for EPlus Customers in Salesforce Portal





PORTAL GOAL: Provide a central case management portal for HPCs to track and resolve open cases with Abode

Two-way engagement keeps communication centralized

CASES: Cases are projects that require action on behalf of the HPC

Return visits

Billing adjustments

Customer follow up

INSPECTIONS: Inspections are read-only records with details regarding Abode inspections and details regarding Return Visits

Proud sponsor of



EVERSOURCE

Eversource Case Portal

Track and resolve cases for Eversource Mass Save customers from EPlus.

Summary



Dashboard

Contractor Dashboard

As of Nov 14, 2022 8:50 AM-Viewing as Test Contractor Contact

[Refresh](#)

My Open Cases

Case Owner ↑	Account Name	Subject	Date/Time Opened	Age
Abode EM	RISE Test Customer	TEST CASE for RISE HPC	10/21/2022 12:21 PM	573
Abode EM	RISE Test Customer	123456 TEST (Return Visit) (Billing Adjustment)	10/31/2022 10:27 AM	335

My Open Cases

2

Proud sponsor of



EVERSOURCE

Eversource Case Portal

Track and resolve cases for Eversource Mass Save customers from EPlus.



Cases

My Open Cases (Contractor)

Printable View

2 items • Sorted by Case Number • Filtered by All cases - Closed, Contractor User? • Updated a few seconds ago

Search this list...



<input type="checkbox"/>	Case Number ↑	Contact Name	Subject	Status	Date/Time Opened	Case Own...
1	<input type="checkbox"/> 00002826	RISE TEST	TEST CASE for RISE HPC	Ready For Approval	10/21/2022 12:21 PM	
2	<input type="checkbox"/> 00002828	RISE TEST	123456 TEST (Return Visit) (Billing Adjustment)	Sent to HPC	10/31/2022 10:27 AM	

- ❑ Select specific Cases by selecting the “Case Number”
- ❑ Sort cases by “Status” or “Date/Time Opened”



Eversource Case Portal

Track and resolve cases for Eversource Mass Save customers from EPlus.

Proud sponsor of



Case
RISE TEST

+ Follow Edit Printable View

Contact Phone	Status	HPC	Subject	Age
666-777-8888	Ready For Approval	<u>TEST HPC</u>	TEST CASE for RISE HPC	24.09

DETAILS RELATED

Contact Name
RISE TEST

Contact Phone
666-777-8888

Contact Email
rise@test.com

Account Name
RISE Test Customer

Drive Link
<https://drive.google.com/drive/folders/1ZSYukMRI00BGY7p1yRUQyTkZJpITmqDr?usp=sharing>



HPC (Assigned User)
Test Contractor Contact

Project ID
123456

Case Type
General Customer Follow-Up;Return Visit;Billing Adjustment

Abode Contact
Travis Estes

Age
24.09

Post

Share an update... Share

Search this feed...

This record was updated.
November 3, 2022 at 11:04 AM

Status
Sent to HPC to Ready For Approval

Status
Closed - Complete to Sent to HPC

- Ask questions, share comments, and upload documents and photos here. This is a searchable feed that all users can access.
- Direct link to Drive folder on record.





Eversource Case Portal

Track and resolve cases for Eversource Mass Save cus

Drive Link
<https://drive.google.com/drive/folders/1ZSYukMRI00BGY7ptyRUQyTkZJpITmqDr?usp=sharing>

Additional Information

Case Origin
Abode Inspector

Status
Ready For Approval

EPlus Inspection Record
[123456 TEST](#)

Contractor Completion Notes ¹
Notes

Contractor Escalation ¹

Report URL

Date/Time Opened
10/21/2022 12:21 PM

Age
24.09

Subject
TEST CASE for RISE HPC

Description
Return visit to fix walls.

Date/Time Closed

- Once Status is set to “Ready For Approval”, Abode will be notified to review the Case.
- “Contractor Completion Notes” are required to update the Status.



- The Description will summarize the details of what needs to be addressed as part of the Case. If the Case is part of an inspection return, you may need to reference the inspection report in Salesforce for more details.



EPlus Inspection
123456 TEST

Account
[RISE Test Customer](#)

Address
123 fun street
reading
ma, 01867

> Manager Review Details (if applicable)

✓ Inspection Details

Inspection Type

Inspection Date

QA Result

Return Repair Visit Needed?

Return Visit Notes

Billing Adjustment Needed?

Emergency Return Visit?

Billing Adjustment Notes

HPC

 [Test Contractor Contact](#)

Report URL

Drive Link

<https://drive.google.com/drive/folders/1ZSYukMRi00BG Y7p1yRUQyTkZJpITmqDr?usp=sharing>

 Cases (2)

Case Number	Subject	Date/Time Op...	Priority	
00002826	TEST CASE fo...	10/21/2022 12:...	Medium	
00002828	123456 TEST (...)	10/31/2022 10:...	Medium	

[View All](#)

 Notes & Attachments (0)

[Upload Files](#)

 [Upload Files](#)

Or drop files

- ❑ View associated Cases
- ❑ View Inspection Details (only applicable fields will be completed)



QA PROCESS SUMMARY:

1. **Abode** completes an inspection and creates the EPlus Inspection Record
2. **Abode** creates Case and assigns to the HPC (if return visit and/or billing adjustment is needed)
3. **HPC** reviews Case details and takes required follow-up action(s)
 - a. Additional details can be accessed from the EPlus Inspection record if needed
4. **HPC** provides documentation of actions taken in the Case feed
5. **HPC** re-statuses Case as “Ready for Approval” and provides notes on actions taken
 - a. Cases needing Abode assistance can be escalated via “Contractor Escalation” field
6. **Abode** reviews documentation of action taken and closes out the Case, or reassigns Case to the HPC for additional follow-up.