Learn About Case-Based Advisee Records

Overview

Usually do not have to keep track of exactly what's related to the Contact record versus the Case record. Advisor Link keeps track for you, saves data in the right places, and even intentionally shows Contact-related data [1] alongside Case-related data [2]. This example snapshot summary gives you a unified, comprehensive picture of the advisee, so you can better understand the whole person that you're supporting.

Considerations

Page Link: https://powerofus.force.com/s/article/SAL-Advisor-App-Cases

The current user view within QA

Sally Advisee Tester test

TASKS | ALERTS | APPOINTM...
3 | 41 | 1

Computer Science
Business Analytics Academy

Last Appointment: Jul 21, 2020

Access Advisee Records

Your Advisor Link administrator has created one or more lists for you to view your cohort of advisees. Use the lists provided and remember that you can also quickly access records using search.

Access Advisee Records from a Full-Screen List View

The full-screen list view offers the most comprehensive list of your advisees. In the full-screen list view, you can even take care of wholesale actions, such as creating a task for multiple advisees at once.

		CASE ... ↑ ∨	CONTACT N... ∨	SUBJECT	∨	STATUS ∨	PRIOR... ∨	DATE/TIME OPENED ∨	CAS... ∨	
1	✔	00001026	Andy Young	Andy Young Advisee Record		Working	Medium	12/1/2017 10:01 AM	UUser	▼
2	✔	00001027	Vanessa Malic	Vanessa Malic Advisee Record		Working	Medium	12/1/2017 1:34 PM	aadvi	▼

Cases
My Advisees ▼

New | Create Advisee Task | Send Email

2 items selected

1. In the app navigation menu next to your workspace tabs, click **Cases**. (If you don't see the Cases option, click the dropdown in the app navigation menu and select Cases.)

2. Click the list view selector and select from the menu a list of advisee records, such as My Advisees.
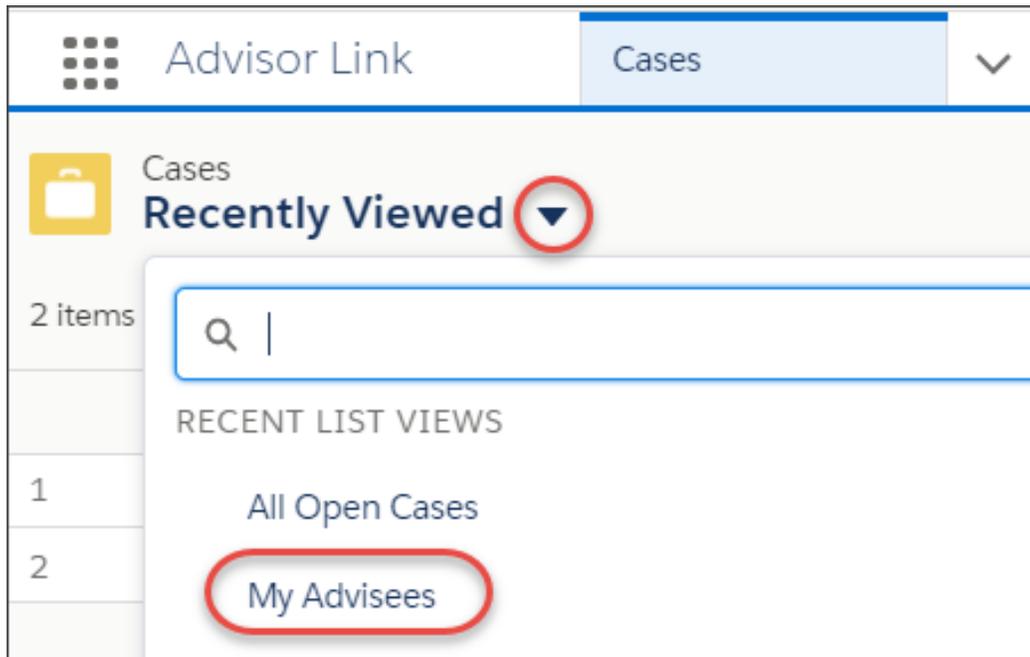
Tip: Need a specific list view that shows a filtered subset of your advisees, such as first-year advisees or student-athletes? Let your administrator know.

3. Click a case number to open the advisee record in the console.

Another way to get to cases in our environment and probably the easiest.