

5/13/20

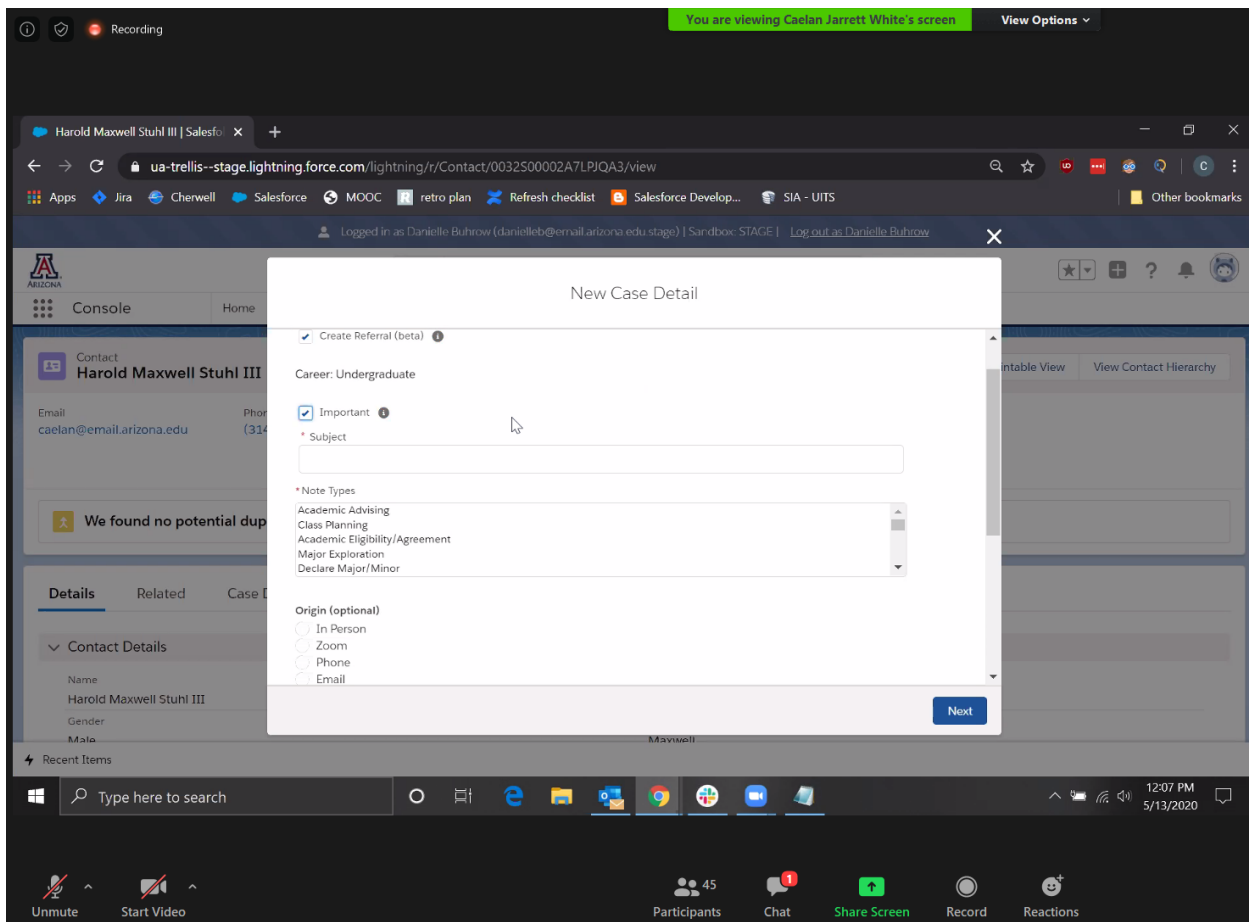
Trellis updates:

-Added "referral" button if advisor is doing so, it will be within Case Detail box. In BETA testing now

-Added "important" checkbox if entry is such, and it will be on top of case details lists.

Marking "important" or changing back to not important, will only be editable until midnight of the entry.

Sample of important case detail entry is below.



Sample of important cases list is below.

The screenshot shows a Zoom meeting window with a browser displaying a Salesforce contact record. The browser address bar shows the URL: `ua-trellis--stage.lightning.force.com/lightning/r/Contact/0032500002A7LPJQA3/view`. The user is logged in as Danielle Buhrow. The contact record for Harold Maxwell Stuhl III includes the following details:

Email	Phone	Mailing Address	Emplid
caelan@email.arizona.edu	(314) 323-9394	3 Loren Woods Dr Saint Louis, MO 63124 US	23054173

Below the contact details, a message states: "We found no potential duplicates of this contact." Under the "Important Cases" section, a table lists the following case:

Case Number	Subject	Owner Name	Date/Time Opened
1 00957100	This is a note	Danielle Buhrow	May 13, 2020, 12:08 PM

The Zoom meeting controls at the bottom show 45 participants, a chat window with 1 message, and options for Unmute, Start Video, Share Screen, Record, and Reactions. The system tray shows the time as 12:09 PM on 5/13/2020.

Referral screen within case detail below

The screenshot displays a Zoom meeting interface with a browser window open to a Salesforce page. A modal window titled "New Case Detail" is centered on the screen. The modal contains the following elements:

- A dropdown menu for "Referred from" with "Advising" selected.
- A dropdown menu for "Referred to" with "Dean of Students" selected.
- A text area with a rich text editor toolbar. The toolbar includes options for font face (Salesforce Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, and unlink.
- A "Next" button at the bottom right of the modal.

The background shows the Salesforce interface for a contact named "Harold Maxwell Stuhl III". The contact's email is "caelan@email.arizona.edu". The page is titled "New Case Detail" and includes a "Next" button at the bottom right.

Sample of referral info is below, which can be changed before submitting, in case error was entered.

The screenshot shows a Zoom meeting window with a browser displaying a Salesforce page. A modal window titled "New Case Detail" is open, showing an "Email Preview" for a referral. The email content is as follows:

Email Preview

Hello Hal,

Below is information related to our discussion:

Referred to Dean of Students on 5/13/2020

This is a referral.

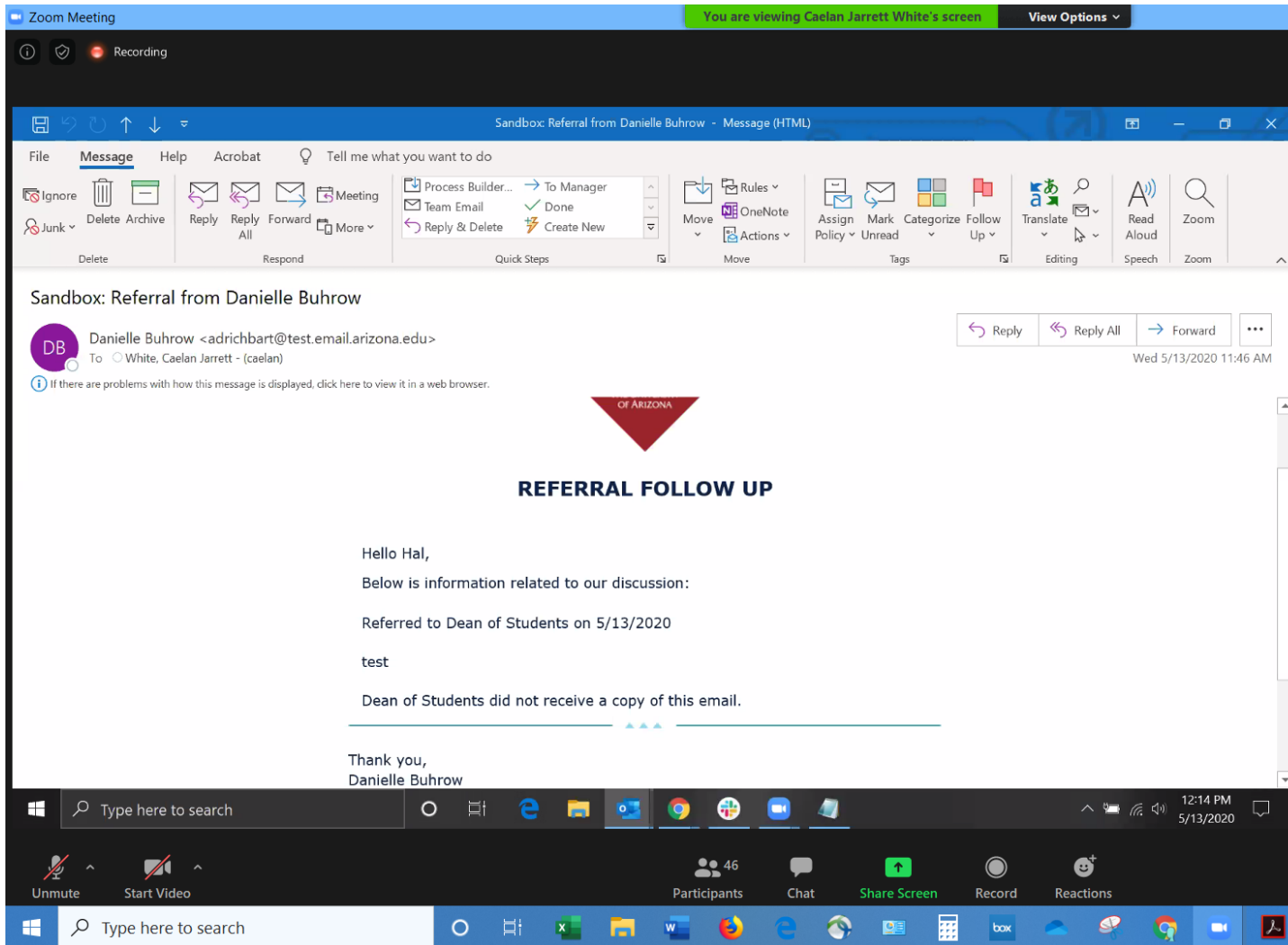
Dean of Students did not receive a copy of this email.

Thank you,
Danielle Buhrow

At the bottom of the modal are "Previous" and "Next" buttons. The background shows the Salesforce interface for contact "Harold Maxwell Stuhl III" with details like email (caelan@email.arizona.edu) and phone number (314...).

Once the referral info is submitted, a referral email is received by the student. Image of sample email is below.

If student reaches out to the referred dept, that dept can view the referral case detail entry for their reference, but only if the student contacts them. Other units will not have viewing access otherwise. The referral unit does not receive an email or notification of the referral.



End of meeting.