



## 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>

1



Stephanie Rhimes

TASKS	ALERTS	APPOINTM...
3	1	0

2

**B.S. Natural Resources**

Last Appointment: Apr 24, 2019

FERPA:

Financial Aid Applicant:

The current user view within QA

## Sally Advisee Tester test

TASKS	ALERTS	APPOINTM...
3	41	1

Computer Science  
Business Analytics Academy

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Last Appointment: Jul 21, 2020

## Access Advisee Records

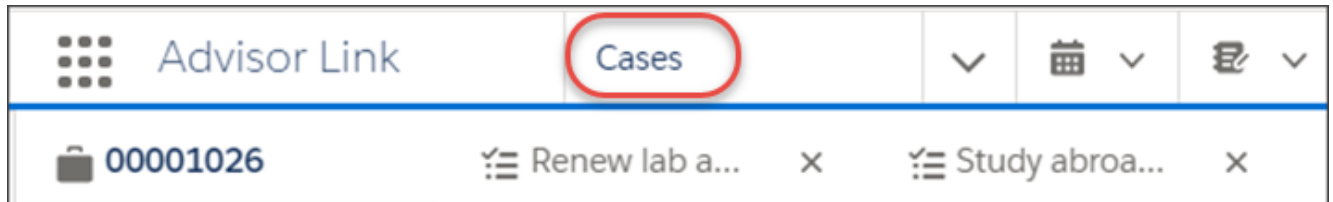
Your Advisor Link administrator has created one or more lists for you to view your cohort of advisees. Use the lists provided and remember that you can also quickly access records using search.

## Access Advisee Records from a Full-Screen List View

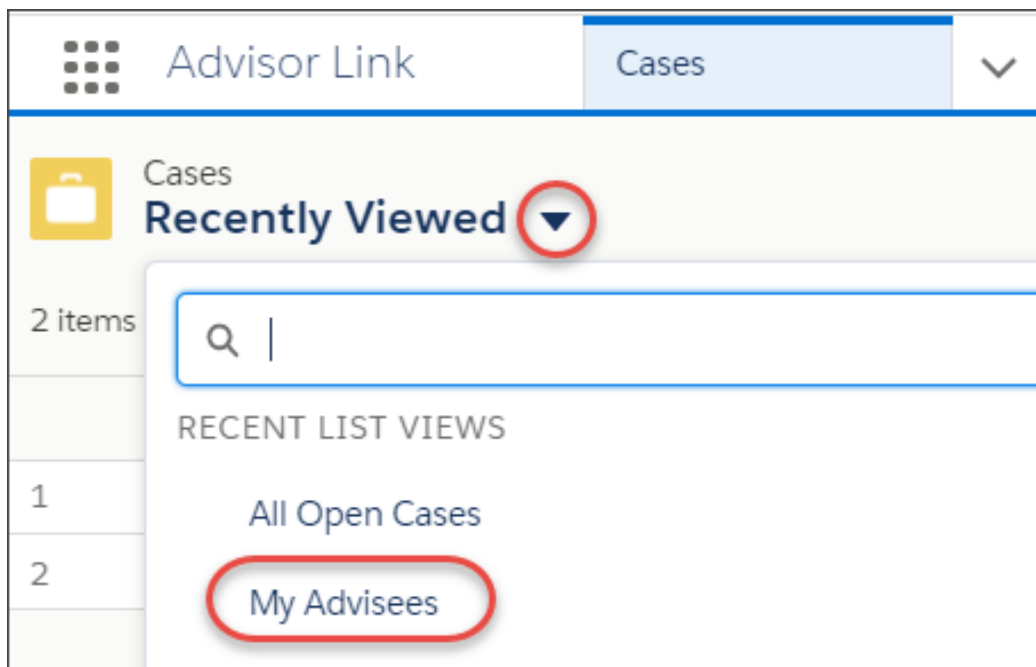
The full-screen list view offers the most comprehensive list of your advisees. In the full-screen list view, you can even take care of wholesale actions, such as creating a task for multiple advisees at once.

		CASE ...	CONTACT N...	SUBJECT	STATUS	PRIOR...	DATE/TIME OPENED	CAS...
2 items selected		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
1	<input checked="" type="checkbox"/>	00001026	Andy Young	Andy Young Advisee Record	Working	Medium	12/1/2017 10:01 AM	UUser
2	<input checked="" type="checkbox"/>	00001027	Vanessa Malic	Vanessa Malic Advisee Record	Working	Medium	12/1/2017 1:34 PM	aadvi

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.

Cases			
My Advisees ▼			
2 items • Sorted by Case Number • Filtered by Closed, Case Record Type • Updated a few seconds ago			
	<input type="checkbox"/> CASE NUMBER ↑ ▼	CONTACT NAME ▼	SUBJECT
1	<input type="checkbox"/> 00001026	Stephanie Rhimes	Stephanie Rhimes Advisee Record
2	<input type="checkbox"/> 00001027	Stuart Sandlin	Stuart Sandlin Advisee Record

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

