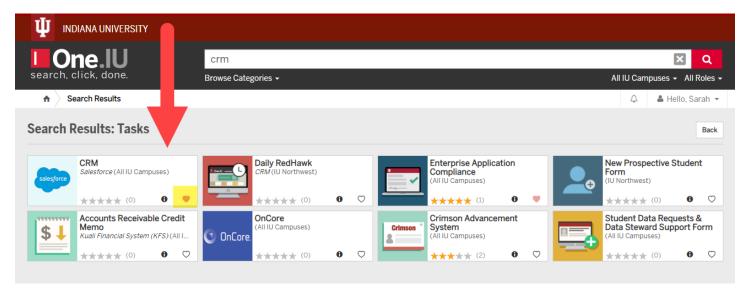


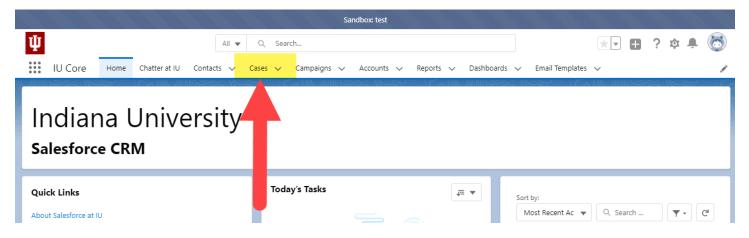
This document walks through the review process of new CRM cases by AP staff.

Click here to learn how to follow up on a case that's been assigned to you.

Login to CRM via the **task tile** in One.IU. Be sure to click the **heart icon** in the bottom right-hand corner of the tile to favorite it.



Once logged in, click the Cases tab.



If you haven't already, locate the **AP Open Cases** list view for your CRM unit by clicking the **down arrow**, then click the **push pin** to make it your default list view.

Click the **Last Modified** column and sort it so that the oldest cases are at the top. Cases created by the support form will have an Origin of "Web." Open the oldest case, the one at the top of the list, by clicking the **case number**.

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In the Details section, click the **pencil icon** next to Assigned User to edit the fields in this section.

Case Converg PM	ence Cloud Service Account.	5/29/2021 4:22	Clone Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
Case Record Type IU Core CRM	Case Owner Assigned Use	Status New	Case Number 00638849					
Details		Activities	Related					
Case Owner UA-VPPF-AP	Account Name Chris Bacon 0030400000F4jMcAA	Email Log	Interaction New Tas	c				
	<u></u>			Write an email.			Com	pose
Assigned User						Filters: All time •	All activities • All typ	oes 🔻
Status New	Contact Emuil bros@bacon.com.test						Refresh • Expand All	
Priority Standard	Contact Phone	✓ Upcoming &	Overdue					
Parent Case	Email-to-Case Origin		Tc	No ne get things moving, ad	ext steps. d a task or set u	p a meeting.		
	Origin of Case Web		No past act	ivity. Past meetings and	d tasks marked a	s done show up here.		



Details		
Case Owner UA-VPPF-		Account Name Chris Bacon 0 ×
1 Assigned U	ser	4 Contact Name
Holl	y Hooper 🗙	🖾 Chris Bacon 🗙
2 * Status In-Progr	ess 💌	Contact Email bros@bacon.com.test
Priority Standard	i v	Contact Phone
Parent Case Search C		Email-to-Case Origin
		Origin of Case Web
✓ Detail	s	
Topic Option 1	Cance	el Save

- 1. **Assigned User**: search for your name and assign the case to yourself.
- 2. **Status**: select In-Progress from the drop-down menu.
- 3. Account Name: if this case involves a supplier company contact, click the "x" in the Account Name field and search for the supplier name. If the company is not available in CRM, leave this field blank.
- Contact: if the Contact field is blank, search for the contact. If the contact is not available in CRM, follow the steps outlined in <u>Manually Create a Contact</u> to create one.
- 5. **Save**: click save to save your work and update the case.

The second half of the Details section contains the information submitted on the support form or via email. Review the **Description** field, then scroll back up to the Activities tab to respond to the case.

Click in the	"Write an emai	il" box to	open the	email tool.
ener in the			open the	C111011 (00011

Details			Activities Related
Case Owner UA-VPPF-AP		Account Name Chris Bacon	Email Log Interaction New Task
		0030400000F4jMcAA J	Write an email Compose
Assigned User		Contact Name	
Holly Hooper	<i>"</i>	Chris Bacon	Filters: All time • All activities • All types
Status		Contact Email	
In-Progress	1	bros@bacon.com.test	Refresh • Expand All • View All
Priority Standard		Contact Phone	✓ Upcoming & Overdue
Parent Case		Email-to-Case Origin	No next steps. To get things moving, add a task or set up a meeting.

Make sure the **From** email address reflects your group account, askap@iu.edu. The Subject line will auto populate.

The email tool works similarly to Outlook or other email clients. You can change fonts, bold, insert screen shots, etc.

A different feature of CRM is the ability to use shared templates. These are pat responses available to your CRM unit only that you can insert into the email tool. Click the **paper icon with the +** sign to select a pat response.

Activiti	es	Related																
Email	Log Int	teraction	Ν	lew Ta	ask													
From	askar	o@iu.edu <	askap	o@iu.e	edu>													•
Γo	bros@	⊉bacon.com	n.test	×													20 (	C Bcc
Subject	Accou	unts Payable	e															
T <sub>x</sub>	<u>A - M -</u>	B I Size		<del>S</del> Form		<>	e7	E	±	4	•¶ 1	H	•= •=	]=	÷j≣	÷.		
Senior	Tainin	; & Comm 1g & Comi				alist												



After clicking the template icon, select **Insert a template...** and a new window opens. Select your CRM unit from the **Template Folders** drop-down menu, then click the **name of the template** in the left-hand column to insert it into your email.

Insert Email Template Select a template for: 🧧 Contacts 😫 Leads 🧰 Cases										
Templates		Template Folders	Search							
All Lightning Templates 🔹		All	Search templates							
Name	✓ Description	All								
Direct Deposit - Change/Edit		Private Email Templates								
IUIE - Electronic Financial Reports		Public Email Templates								
HTTP 500 Error		UA-VPPF-CTRO								
IUHR - Name Change Request		UA-VPPF-ESTC								
IUHR - ePTO Help		UA-VPPF-CTRO								
Additional Information Needed		UA-VPF-CTRO								
Action List: Automated Emails		UA-VPF-CTRO								
TIME: Timesheet Corrections		UA-VPPF-CTRO								
Duplicate Tax Form Request - PDF version		UA-VPPF-CTRO								
Action List: Clearing Action Items		UA-VPPF-CTRO								
Duo		UA-VPPF-CTRO								
Clearing Cache		UA-VPPF-CTRO								
IUHR - Forward to Customer Care		UA-VPPF-CTRO								

Click **Send** when you're ready to send your response. In the example below a template used by the UCO Customer Service team was inserted.

Email       Log Interaction       New Task         From       askap@iu.edu <askap@iu.edu> <ul> <li>askap@iu.edu&lt;<askap@iu.edu></askap@iu.edu></li> <li>bros@bacon.com.test ×</li> <li>@ Cc Bcc</li> </ul>          To       bros@bacon.com.test ×       @ Cc Bcc         Subject       UCO Support Form Received Duo Two-Factor Authentication         Image: Image</askap@iu.edu>	Activiti	es Related
To       bros@bacon.com.test ×         Subject       UCO Support Form Received Duo Two-Factor Authentication         Image: Index I with the second of the second o	Email	Log Interaction New Task
Subject       UCO Support Form Received Duo Two-Factor Authentication         Image: Im	From	askap@iu.edu <askap@iu.edu></askap@iu.edu>
Image: Interview and the constraint and	То	bros@bacon.com.test X
Font       Size       Normal         Font       Size       Normal         Hello {{{Recipient FirstName}}}       .         Thank you for contacting Office of the University Controller Customer Service.	Subject	UCO Support Form Received Duo Two-Factor Authentication
Thank you for contacting Office of the University Controller Customer Service. Indiana University requires two-factor authentication for security purposes. Duo allows you to choose the nost optimal option: Duo Push (via an app on multiple smart devices); text message to your cell phone; autor voice call to any phone number; or a dedicated hardware for those who cannot use the above Duo option have a business need for the hardware (Duo token). The following IU Knowledge Base document provides information on how to register a smartphone or tablet: <u>https://kb.iu.edu/d/bfgm</u> . All questions should be directed to the University Information Technology Services (UITS) team		
	Thank Indiani optima voice o have a The fo tablet: <b>All qu</b>	you for contacting Office of the University Controller Customer Service. a University requires two-factor authentication for security purposes. Duo allows you to choose the post l option: Duo Push (via an app on multiple smart devices); text message to your cell phone; autor ed scall to any phone number; or a dedicated hardware for those who cannot use the above Duo option business need for the hardware (Duo token). llowing IU Knowledge Base document provides information on how to register a smartphone or https://kb.iu.edu/d/bfgm. estions should be directed to the University Information Technology Services (UITS) tean.

Next, navigate to the **Log Interaction** tab. Here you'll log what action you took, i.e., email, phone, mail, etc. along with a comment describing the action that was taken.

- 1. Assigned To: this field reflects who the case is assigned to. No edits needed.
- 2. Subject: enter today's date followed by "Follow Up."
- 3. Type: select the appropropriate type of interaction from the drop-down menu (i.e. phone, email, etc.)
- 4. **Comments**: enter a summary of your interaction with the contact and next steps for the case.
- 5. **Save**: click save to log the interaction.

Email Log Interaction New Task	
* Assigned To	Name
Sarah Chavez	× Chris Bacon ×
Subject	Related To
[Today's Date] Follow Up	Q 00638849
Туре	Comments 4
Email	Emailed contact instructions on how to update funding accounts on an invoice.

Finally, return to the Details section of the case, click the **pencil icon** next to Status, and change the status to **Closed**, then click **Save**.

Details		Activities Related	
Case Owner	Account Name	Email Log Interaction New Task	
UA-VPPF-AP Assigned User	Chris Bacon 0 X	Recap your call	Add
Holly Hooper X	🖪 Chris Bacon 🗙		Filters: All time • All activities • All types
*Status 5 Closed 🗸	Contact Email bros@bacon.com.test		Refresh • Expand All • View Al
Priority	Contact Phone	✓ Upcoming & Overdue	
Standard 🔻		No next steps. To get things moving, add a task or set up a	meeting.
Parent Case Search Cases Q	Email-to-Case Origin	✓ August + 2021	This Month
Search Cases Q	Ori of Case	>  [Today's Date] Follow Up You logged a call with <u>Chris Bacon</u>	Today 💌
✓ Details		No more past activities to load.	
Topic			
Option 1	Save		

## Following up on a Case

When you receive a response on a case or see that a case has been assigned to you, always review the **Related** tab first. The Related tab is in the pane on the right-hand side of the case.

Case 👸 Sarah Ch	1avez,	8/3/2021 12:37	PM			Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
ase Record Type I Core CRM		Owner VPPF-SDM 같	Assigned User	ivez	Status Closed		ise Number 1638983					
Details				Activiti	es R	elated						
Case Owner UA-VPPF-SDM		Account Name Gina Stillions	1	Email	Log Inter		New Task					
Assigned User	1	Contact Name Gina Stillions	1					Write an email			Com	pose
Status Closed		Contact Email gstillio@indiana.e	du.test							Filters: All time •	All activities • All typ	pes .
Priority Standard		Contact Phone								1	Refresh • Expand All	• View
Parent Case		Email-to-Case Origin		↓ Upcor	ning & Ove	r						
		Origin of Case					To <u>c</u>	No n get things moving, ad	ext steps. Id a task or set u	p a meeting.		
		Web		Augur	+. 2021						ты	ic Mon

This area is made up of several sections that together provide a full history of the case.

- Activity: running list of tasks and interactions, including emails, involving the case.
- **Emails**: contains all email communications with the client. The top-most email is the most recent.
- Case Comments: contains all Internal Comments that were logged after action was taken on the case.
- **Case History**: provides a history of status and assignments of the case.

Click on an interaction in the Activity History section to review what actions have been taken on the case previously. Remember to click **View All** if there have already been several interactions have been logged on the case. You'll need to click on each interaction to see the comments associated with that action.

Activity History (	Log Interaction View All				
Subject	Name	Last Modified Date	Status		
[Today's Date] Follow Up	Chris Bacon	8/3/2021 5:58 PM	Completed	•	
		View All			

Return to the Activities tab and use the email tool to reply to the message. The email tool keeps a running chain of all communications related to the case, so if you scroll down a bit you'll be able to see the most recent response then enter yours at the top.

After responding, remember to log an interaction, then close the case.