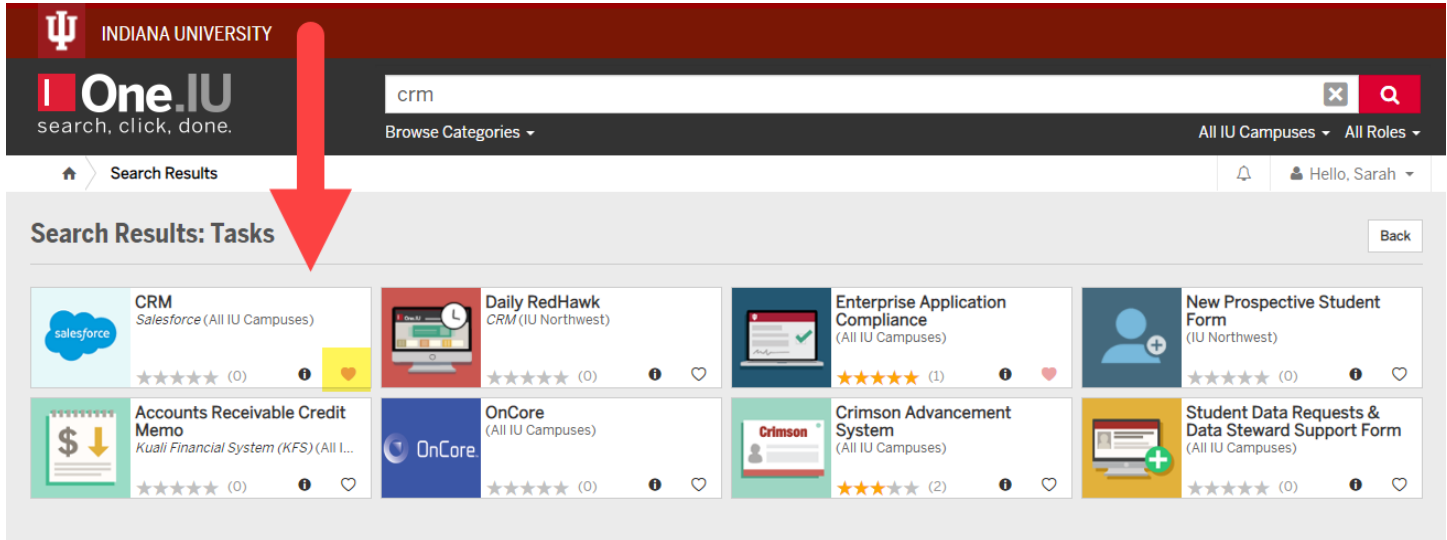


AP: Work a Case

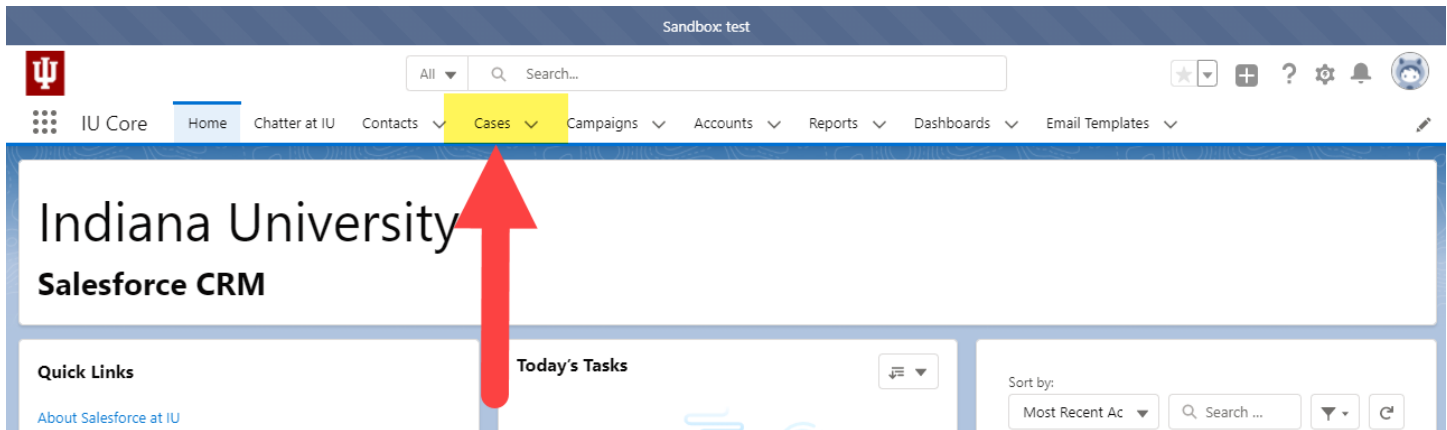
This document walks through the review process of new CRM cases by AP staff.

[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.

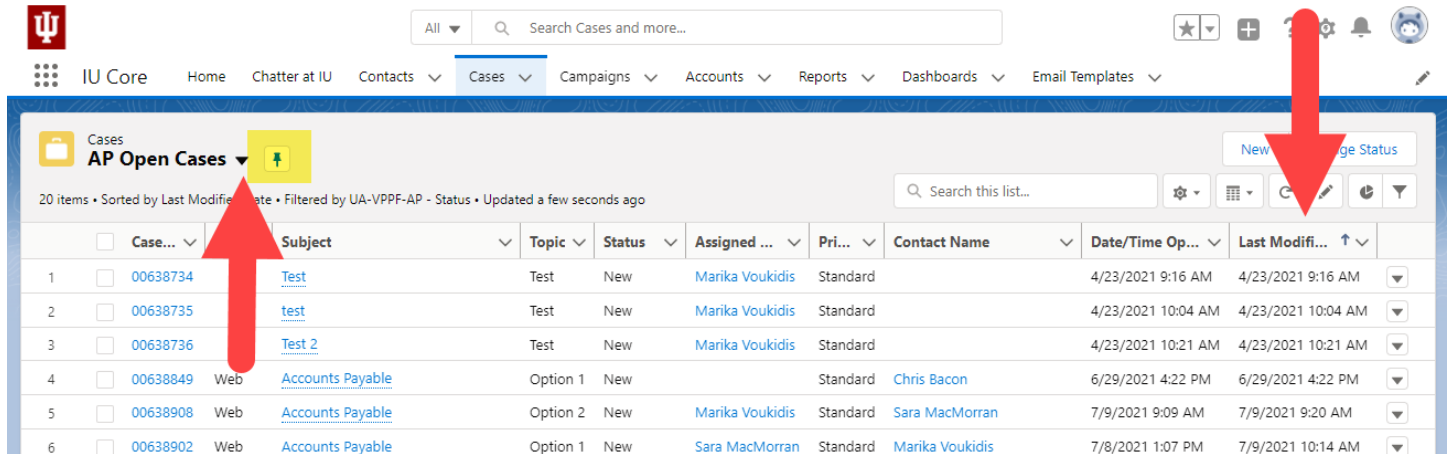


Once logged in, click the **Cases** tab.




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**.



Search Cases and more...

Home Chatter at IU Contacts Cases Campaigns Accounts Reports Dashboards Email Templates

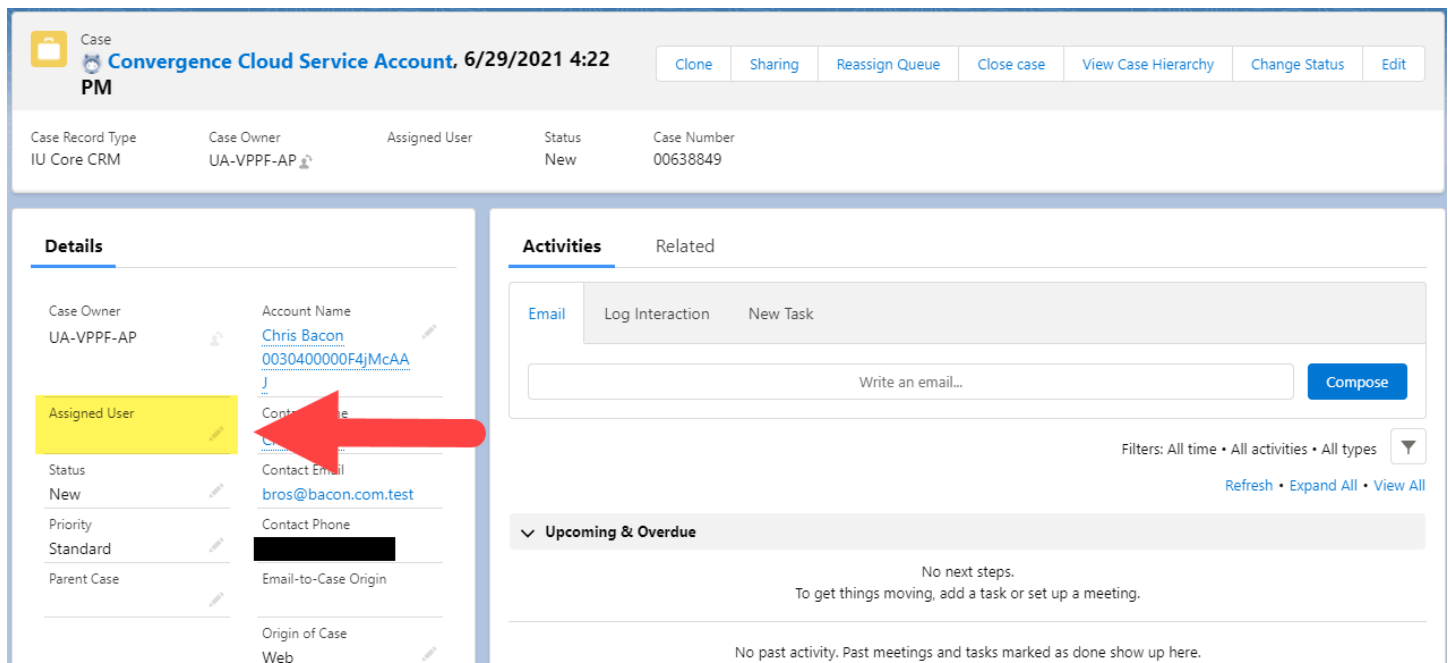
Cases **AP Open Cases** 

20 items • Sorted by Last Modified • Filtered by UA-VPPF-AP - Status • Updated a few seconds ago


Search this list...

	Case...	Subject	Topic	Status	Assigned ...	Pri...	Contact Name	Date/Time Op...	Last Modifi...
1	00638734	Test	Test	New	Marika Voukidis	Standard		4/23/2021 9:16 AM	4/23/2021 9:16 AM
2	00638735	test	Test	New	Marika Voukidis	Standard		4/23/2021 10:04 AM	4/23/2021 10:04 AM
3	00638736	Test 2	Test	New	Marika Voukidis	Standard		4/23/2021 10:21 AM	4/23/2021 10:21 AM
4	00638849	Web Accounts Payable	Option 1	New		Standard	Chris Bacon	6/29/2021 4:22 PM	6/29/2021 4:22 PM
5	00638908	Web Accounts Payable	Option 2	New	Marika Voukidis	Standard	Sara MacMorran	7/9/2021 9:09 AM	7/9/2021 9:20 AM
6	00638902	Web Accounts Payable	Option 1	New	Sara MacMorran	Standard	Marika Voukidis	7/8/2021 1:07 PM	7/9/2021 10:14 AM

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




Case **Convergence Cloud Service Account. 6/29/2021 4:22 PM** [Clone](#) [Sharing](#) [Reassign Queue](#) [Close case](#) [View Case Hierarchy](#) [Change Status](#) [Edit](#)

Case Record Type: IU Core CRM | Case Owner: UA-VPPF-AP | Assigned User:  | Status: New | Case Number: 00638849

Details

Case Owner: UA-VPPF-AP

Account Name: [Chris Bacon](#) [0030400000F4jMcAA](#)

Assigned User 

Status: New

Priority: Standard

Parent Case:

Contact Email: [bros@bacon.com.test](#)

Contact Phone: [REDACTED]


Email-to-Case Origin:

Origin of Case: Web

Activities [Related](#)

Email Log Interaction New Task

Write an email... [Compose](#)

Filters: All time • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

The screenshot shows the 'Details' section of a Salesforce case record. Numbered callouts indicate the following fields:

- 1. Assigned User: Holly Hooper
- 2. Status: In-Progress
- 3. Account Name: Chris Bacon 0
- 4. Contact Name: Chris Bacon
- 5. Save button

Other visible fields include Case Owner (UA-VPPF-AP), Priority (Standard), Parent Case (Search Cases...), Contact Email (bros@bacon.com.test), Contact Phone (redacted), Email-to-Case Origin, and Origin of Case (Web).

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.
4. **Contact:** if the Contact field is blank, search for the contact. If the contact is not available in CRM, follow the steps outlined in [Manually Create a Contact](#) 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 email...” box to open the email tool.

The screenshot shows the full Salesforce case record interface. The 'Details' tab is active on the left, displaying case information. The 'Activities' tab is active on the right, showing a list of activities with a 'Write an email...' button highlighted in yellow. Below the activities list, there is a section for 'Upcoming & Overdue' tasks, which currently shows 'No next steps. To get things moving, add a task or set up a meeting.'

Activities

Related

EmailLog InteractionNew Task

From

askap@iu.edu <askap@iu.edu>

To

bros@bacon.com.test X |

Cc Bcc

Subject

Accounts Payable

I_x

A ▾

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B

I

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S

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Font ▾

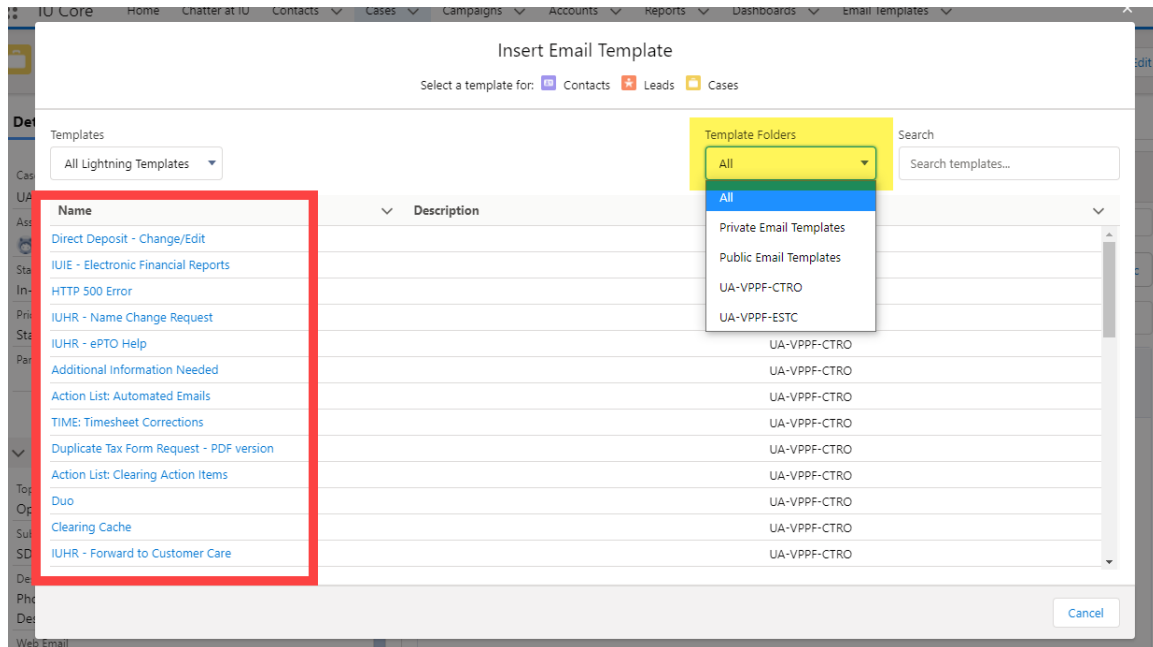
Size ▾

Format ▾

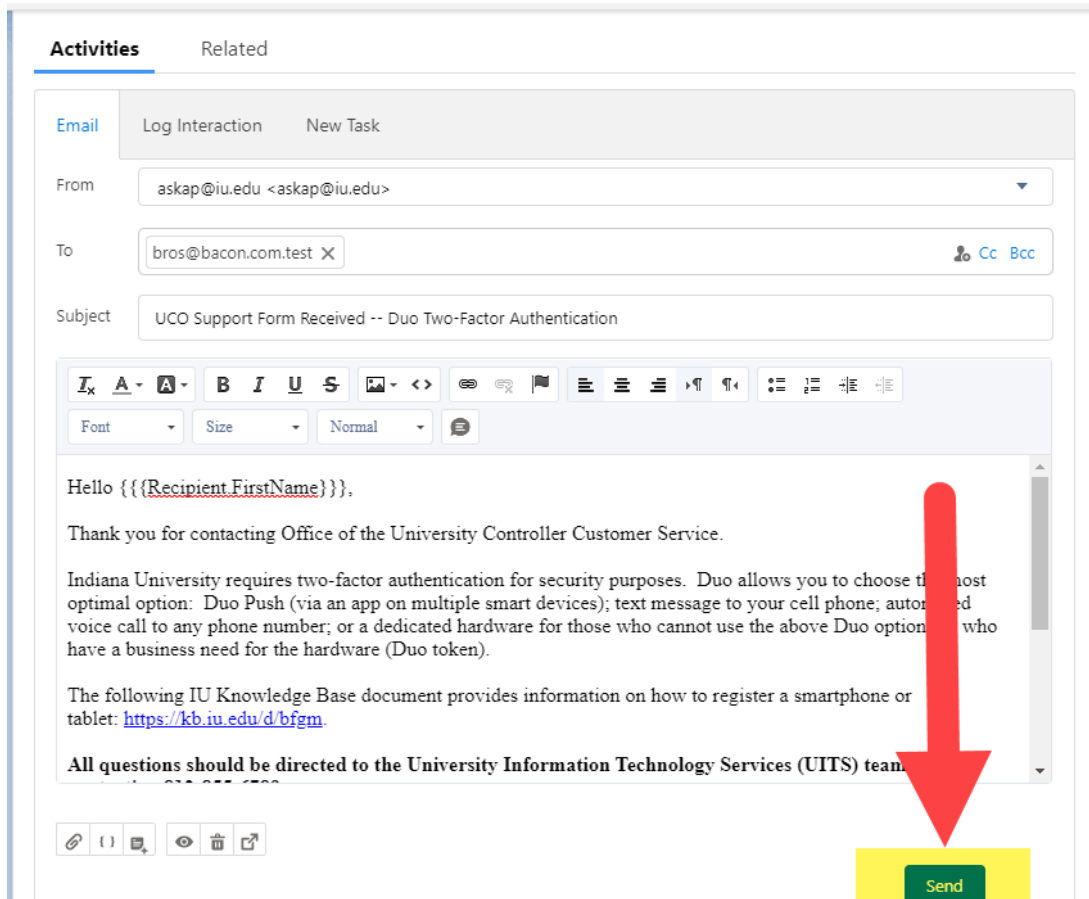
Sarah Chavez
Senior Training & Communication Specialist
VPCFC Training & Communications
estc@iu.edu

Send

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.



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.



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 appropriate 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.

Activities Related

Email **Log Interaction** New Task

1 *Assigned To Sarah Chavez

2 Subject [Today's Date] Follow Up

3 Type Email

4 Comments Emailed contact instructions on how to update funding accounts on an invoice.

5 Save

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

Case Owner: UA-VPPF-AP

Assigned User: Holly Hooper

*Status: Closed

Priority: Standard

Parent Case: Search Cases...

Account Name: Chris Bacon

Contact Name: Chris Bacon

Contact Email: bros@bacon.com.test

Contact Phone: [Redacted]

Email-to-Case Origin: [Redacted]

Details

Topic: [Redacted]

Option 1: [Redacted]

Cancel Save

Activities Related

Email **Log Interaction** New Task

Recap your call... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.

To get things moving, add a task or set up a meeting.

August - 2021 This Month

[Today's Date] Follow Up

You logged a call with Chris Bacon

No more past activities to load.

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.

The screenshot shows a Salesforce Case record for Sarah Chavez, dated 8/3/2021 12:37 PM. The case is closed and assigned to Sarah Chavez. The 'Related' tab is highlighted with a red arrow. The 'Details' pane on the left shows case information: Case Owner (UA-VPPF-SDM), Assigned User (Sarah Chavez), Status (Closed), Priority (Standard), and Parent Case. The 'Activities' pane on the right shows a list of interactions with a 'Compose' button and filters. The 'Related' tab is highlighted with a red arrow.

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.

The screenshot shows the 'Activity History (1)' section. It contains a table with the following data:

Subject	Name	Last Modified Date	Status
[Today's Date] Follow Up	Chris Bacon	8/3/2021 5:58 PM	Completed

A red arrow points to the 'View All' link below the table.

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.