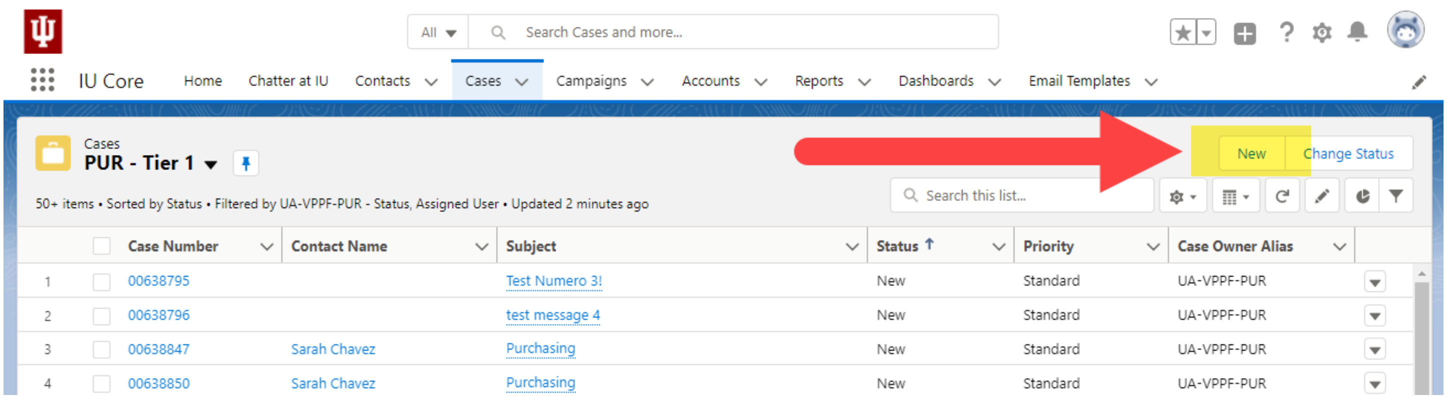
# Manually Create a Case

Most CRM cases will be created by support form submissions or by users logging comments on BUY.IU documents. However, you may need to manually create a case to capture a phone call or IM/Chat conversation.

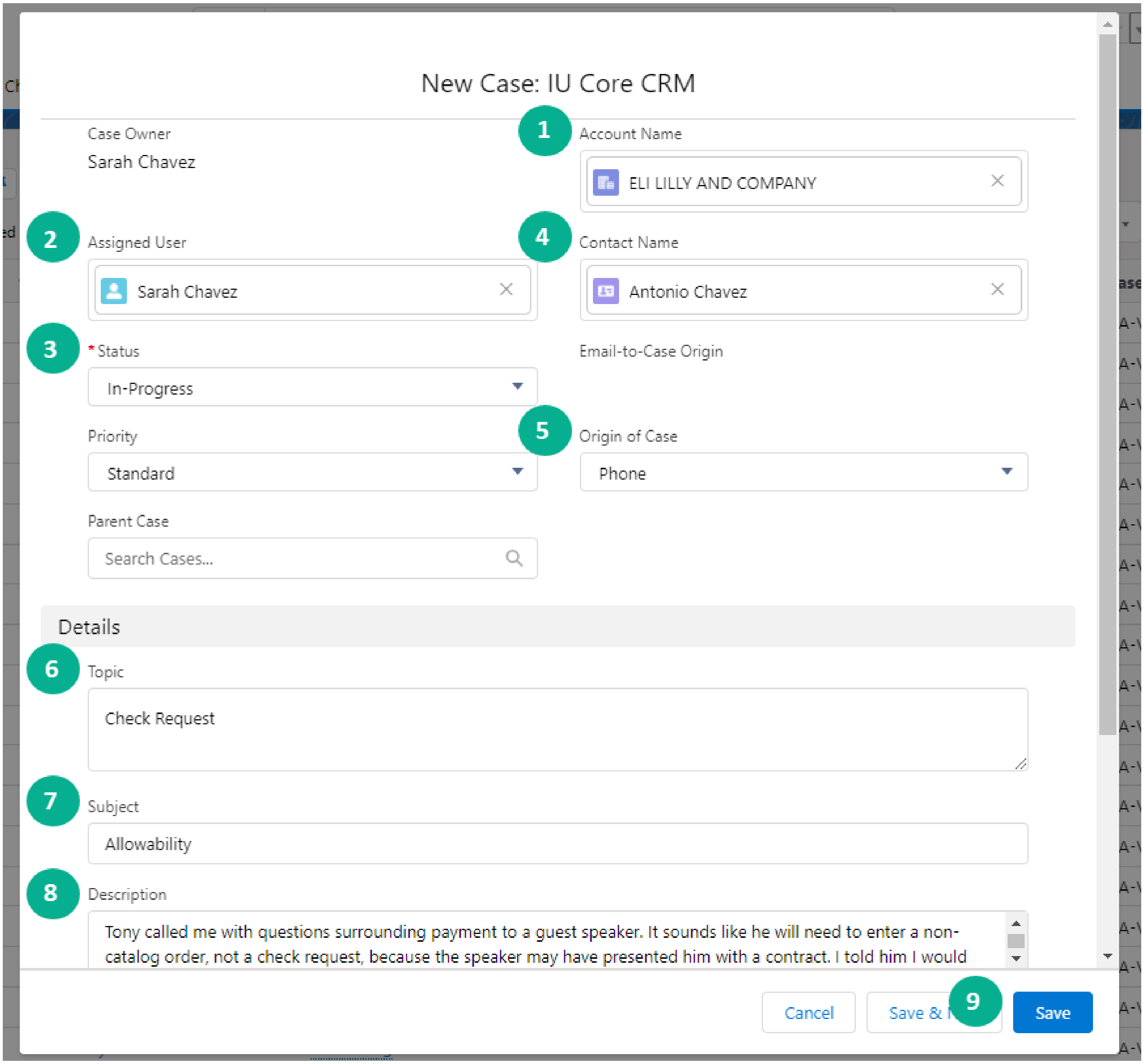
Essentially, if you have an interaction with a supplier or department user that requires follow up, create a case to track your progress and ensure you get credit for the time you spent providing customer service to that contact.

On the Cases screen in CRM, click **New** in the upper right-hand corner.




A new window opens where you'll enter the details of the case.

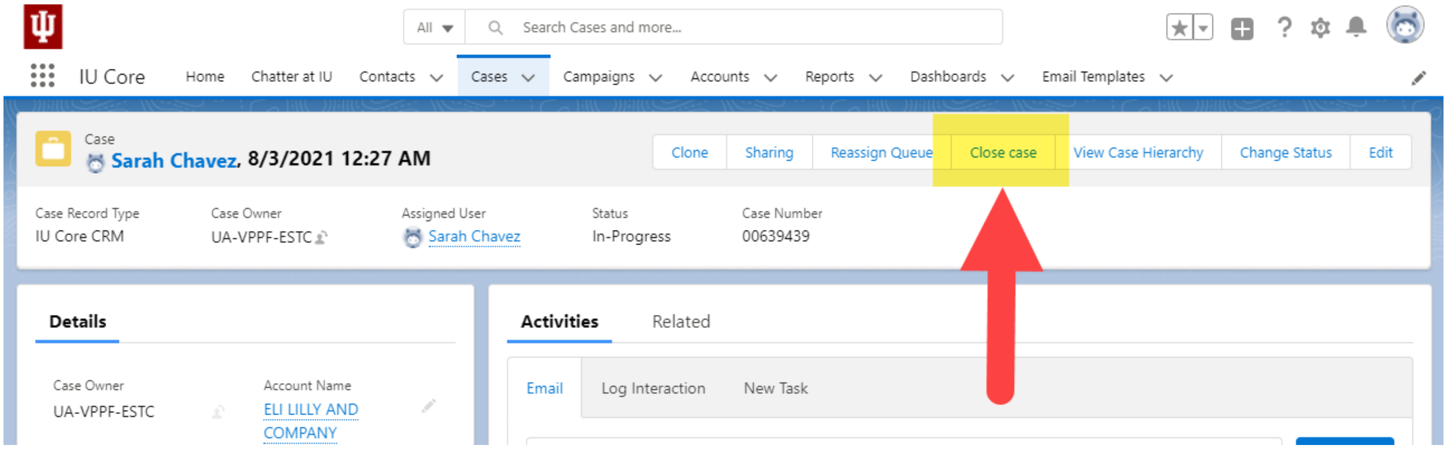
1. **Account Name**: if the case involves a profile 1 or 2 supplier, search for the supplier and add them. If the supplier is not available in CRM leave this field blank. If the case involves an individual, skip this step.
2. **Assigned User**: search for the first and last name of the individual who will manage the case. This will likely be yourself.
3. **Status**: select In-Progress from the drop-down menu.
4. **Contact Name**: search for the first and last name of the individual that you're helping. If the contact does not exist, follow these instructions to Manually Create a Contact.
5. **Origin of Case**: select how the case was started. Phone call, IM/Chat, etc.
6. **Topic**: select the appropriate topic from the Topic list.
7. **Subject**: select the appropriate subject from the Subject list.
8. **Description**: Enter a recap of the interaction with the contact.
9. **Save**: click save to save your work and create the case.



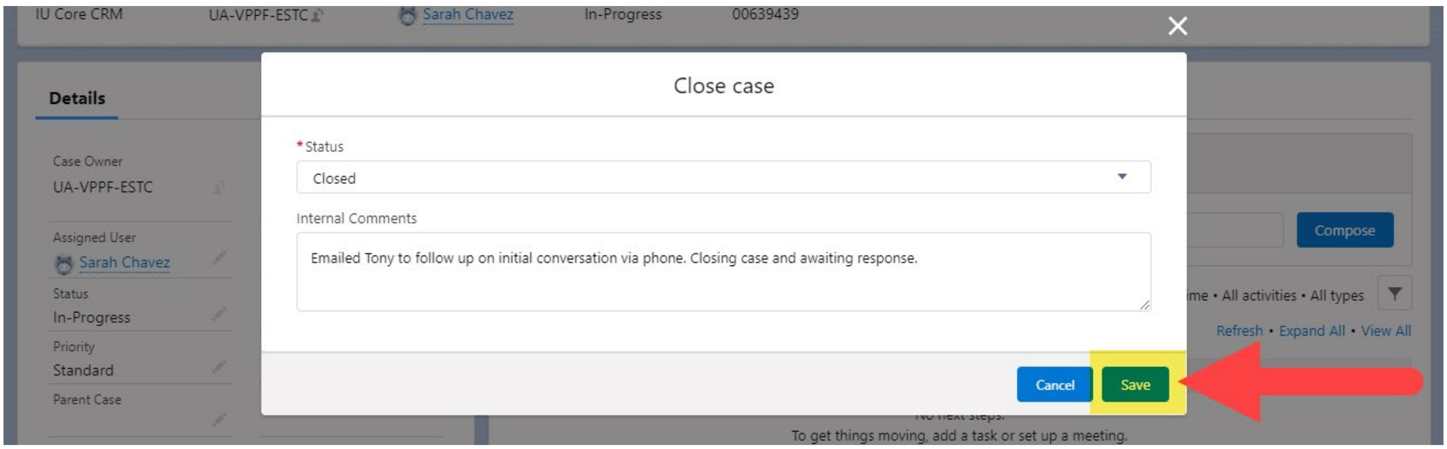

After saving, CRM loads the new case. You can now use the CRM email tool in the **Activities** tab to follow up with the contact or log additional interactions.

If you are a member of the SDM or AP team, follow the steps below to close the case after creating it.

Click the **Close case** button in the upper right-hand corner of the screen.




A new window opens. CRM prompts you to log a comment. Comments are only visible to CRM users and are not sent to the contact. Click **Save** to save your comment and close the case.




If you sent an email to the contact, the case will reopen and appear in your assigned cases list.