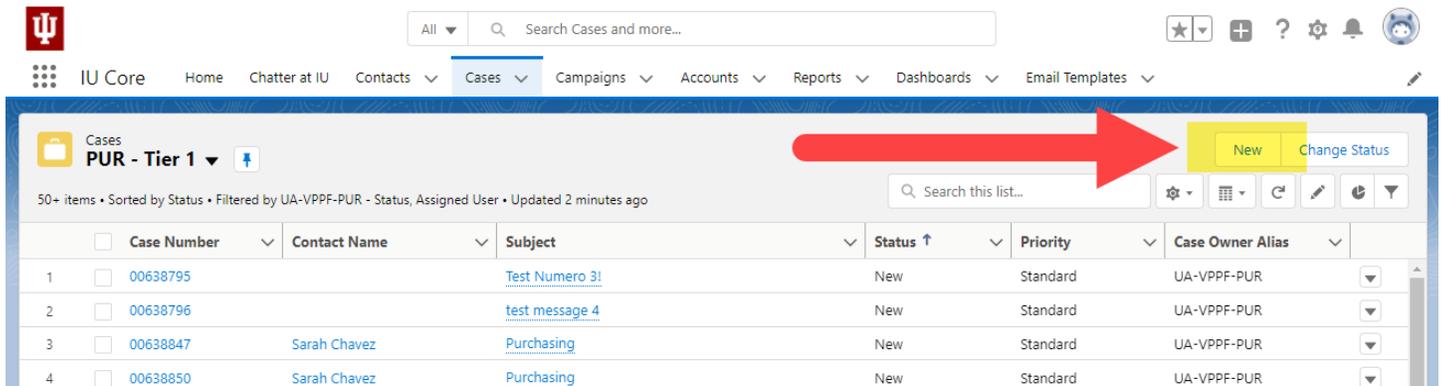


# Manually Create a Case

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.

- 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.
- Assigned User:** search for the first and last name of the individual who will manage the case. This will likely be yourself.
- Status:** select In-Progress from the drop-down menu.
- 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](#).
- Origin of Case:** select how the case was started. Phone call, IM/Chat, etc.
- Topic:** select the appropriate topic from the Topic list.
- Subject:** select the appropriate subject from the Subject list.
- Description:** Enter a recap of the interaction with the contact.
- Save:** click save to save your work and create the case.



### New Case: IU Core CRM

Case Owner  
Sarah Chavez

Account Name  
ELI LILLY AND COMPANY

Assigned User  
Sarah Chavez

Contact Name  
Antonio Chavez

\* Status  
In-Progress

Priority  
Standard

Parent Case  
Search Cases...

Email-to-Case Origin

Origin of Case  
Phone

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**Details**

Topic  
Check Request

Subject  
Allowability

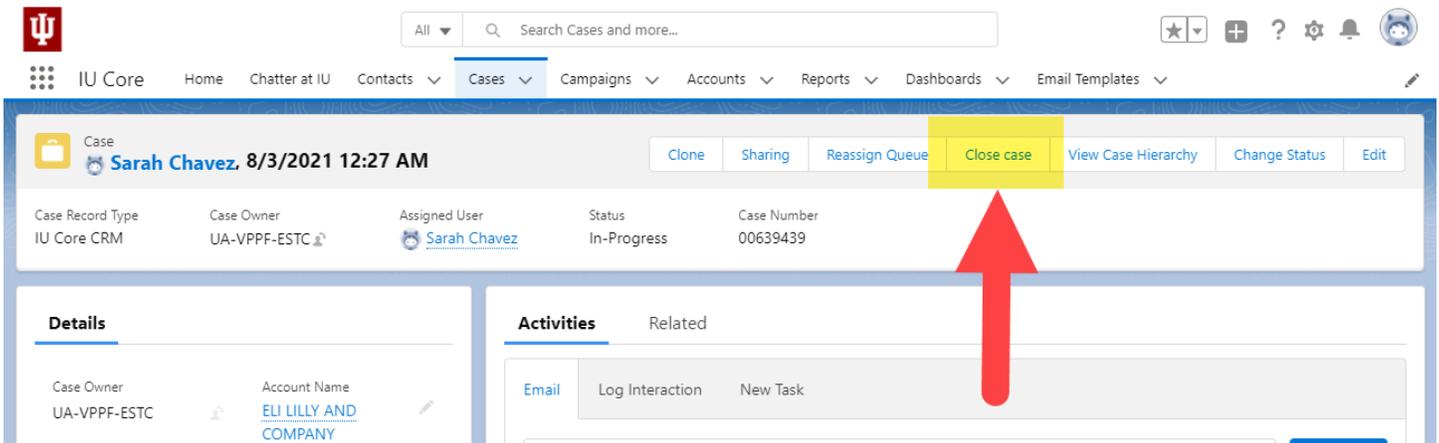
Description  
Tony called me with questions surrounding payment to a guest speaker. It sounds like he will need to enter a non-catalog order, not a check request, because the speaker may have presented him with a contract. I told him I would

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.

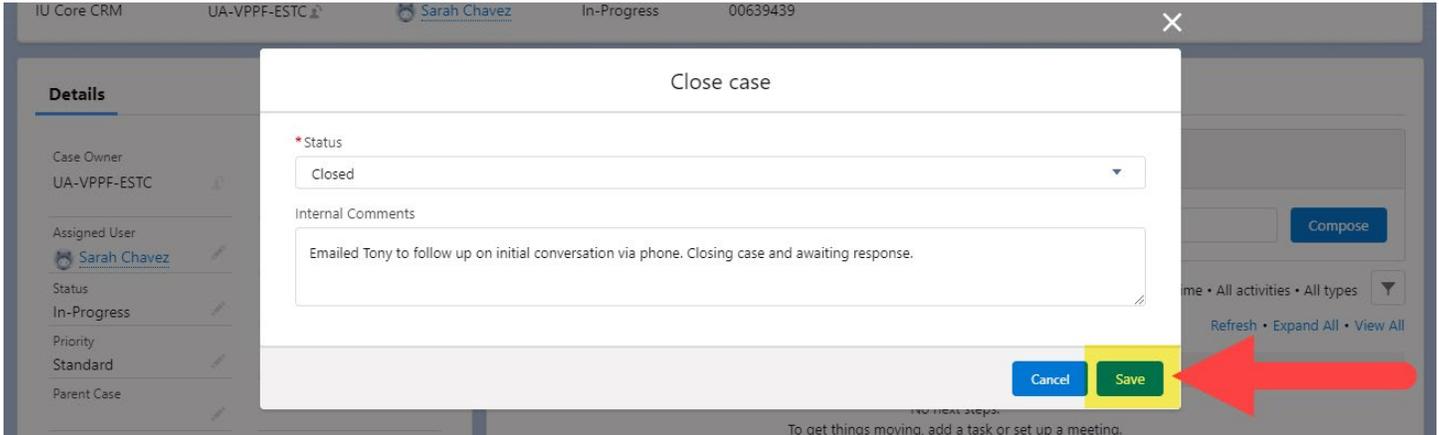
If you are a member of the SDM or AP team, follow the steps below to close the case after creating it.



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.