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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.

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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 <u>Manually Create a Contact</u>.
- 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.

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I	New Case:	IU Core CRM			
Case Owner	1	1 Account Name			
Sarah Chavez		ELI LILLY AND COMPANY	×		
Assigned User	4	Contact Name			
Sarah Chavez	×	Antonio Chavez	×		
* Status		Email-to-Case Origin			
In-Progress	•				
Priority	5	Origin of Case			
Standard	•	Phone	•		
Parent Case					
Search Cases	Q				
Details					
Торіс					
Check Request					
Subject					
Allowability					
Description					
Tony called me with questions surrounding catalog order, not a check request, because	payment to a gue the speaker ma	uest speaker. It sounds like he will need to enter a non- y have presented him with a contract. I told him I would	•		
		Cancel Save & 9	Save		

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.

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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.

Details		Close case	
Casa Ounar		*Status	
UA-VPPF-ESTC	£	Closed 💌	
		Internal Comments	Compose
Assigned User	1	Emailed Tony to follow up on initial conversation via phone. Closing case and awaiting response.	Compose
Status			ime • All activities • All types
In-Progress	1		Refresh • Expand All • View
Priority Standard	1		
Parent Case		Cancel	

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