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Purchasing: Work a Case

This document walks through the review process of new CRM cases by Purchasing staff. This document is geared toward Tier 1 support, those working the help desk, but can be used by anyone 😊

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.

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search, click, done.	Browse Categories -	All IU Can	npuses 👻 All Roles 👻
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Once logged in, click the **Cases** tab.

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If you haven't already, locate the **PUR – Tier 1** list view 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	gence	Cloud Service Account,	7/6/2	2021 5:45 PM	Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
Case Record Type IU Core CRM	Case UA-\	Owner Assigned U VPPF-PUR 🔊	ser	Status New	Case Numbe 00638868	er					
Details			Γ	Activities	Related						
Case Owner UA-VPPF-PUR		Account Name	L	Email Log In	teraction	New Task					
Assigned User	1		Þ.				Write an email.			Com	pose
Status		Contact Email									
New	1	dbodle@iu.edu.test							Filters: All time •	All activities • All typ	oes 🔻
Priority		Contact Phone							F	Refresh • Expand All	View All
Parent Case	<i>ν</i>	Email-to-Case Origin		✓ Upcoming & O	verdue						
	/	Origin of Case				To g	No ne get things moving, add	ext steps. d a task or set u	p a meeting.		



Case Owner	3	Account Name
UA-VPPF-PUR		🖪 Dawn Bodle 🗙
Assigned User	4	Contact Name
Juliet Roberts	×	💷 Dawn Bodle 🗙
* Status	5	Contact Email
In-Progress	•	dbodle@iu.edu.test
Priority		Contact Phone
Standard	•	
Parent Case		Email-to-Case Origin
Search Cases	Q	
		Origin of Case
		Web 🔻
✓ Details		
Topic		
Option 2		

- 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 and take one of the following actions:

- 1. Assign the case to another member of Tier 1: if the case should be resolved by another member of Tier 1 support, reassign the case to that individual by editing the Assigned User field as described above.
- 2. Assign the case to Tier 2: if the case should be escalated, follow the instructions outlined in the Escalate a Case document.
- 3. **Reassign the case to another CRM unit**: if the case does not fall under the purview of Purchasing's responsibilities, follow the instructions outlined in the <u>Reassign a Case to Another Queue document</u>.

After any of the actions above, return to the PUR – Tier 1 list view and review the next case.

If the case falls under your purview, continue following the steps in this document.



Navigate to the **Activities** tab to respond via email. Click in the "Write an email..." box to open the email tool.

Case	avez,	8/3/2021 9:50	РМ			Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
Case Record Type IU Core CRM	Case (UA-V	Owner ∕PPF-PUR ≰ੇ	Assigned Use	er oberts	Status In-Progr	ess	Case Number 00638868					
Details				Δ	Activities	Related						
Case Owner UA-VPPF-PUR		Account Name Dawn Bodle	1	E	Email Log In	teraction	New Task					
Assigned User		Contact Name Dawn Bodle	1					Write an email.			Comp	ose
Status In-Progress	1	Contact Email dbodle@iu.edu.te	st							Filters: All time •	All activities • All typ	es 🔻
Priority Standard	1	Contact Phone								F	Refresh • Expand All	• View All
Parent Case		Email-to-Case Origin		~	 Upcoming & O 	verdue						

Make sure the **From** email address reflects your group account, askpur@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.

	Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
Activitie	es Related						
Email	Log Interaction	New Task					
From	askpur@iu.edu <	askpur@iu.ed	u>				•
То	dbodle@iu.edu.te	st 🗙				🕹 Cc	Bcc
Subject	Purchasing						
Sarah O Senior VPCFO estc@i	Chavez Training & Commu aining & Comm lu	unication Sp nunications	ecialist				
6	■. <mark>● </mark>						



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.

IU CORE Home chatter at IU contac	is 🗸 Cases 🗸 Campaigns 🗸 Accounts Insert Email	: 🗸 кероття 🗸 Dashboards 🗸 Email I Template	emplates 🤍 🔨
	Select a template for: 回 Contac	cts 🚼 Leads 📋 Cases	
Templates		Template Folders	Search
All Lightning Templates		All	Search templates
JA Name	 Description 	All	~
Direct Deposit - Change/Edit		Private Email Templates	A.
ta IUIE - Electronic Financial Reports		Public Email Templates	
n- HTTP 500 Error		UA-VPPF-CTRO	
IUHR - Name Change Request		UA-VPPF-ESTC	
IUHR - ePTO Help		UA-VPPF-CTRO	
Additional Information Needed		UA-VPPF-CTRO	
Action List: Automated Emails		UA-VPPF-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	
D IUHR - Forward to Customer Care		UA-VPPF-CTRO	v
ihc Je:			Cancel

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 In	teraction	Nev	/ Task													
From	askp	ur@iu.edu	<askpur(< td=""><td>@iu.edu></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>•</td></askpur(<>	@iu.edu>													•
Го	dbod	le@iu.edu.	test 🗙													🎝 Cc	Всс
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If your response resolves the issue, close the case. Click **Close case** in the upper right-hand corner.

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IU Core Home Chatter at IU Contacts 🗸	Cases 🗸 Campaigns 🗸 Accounts 🗸 Reports 🗸 Dashboards 🗸	Email Templates 🗸 🖋
Case Sarah Chavez, 8/3/2021 9:50 PM	Clone Sharing Reassign Queue Close case	View Case Hierarchy Change Status Edit
Details	Activities Related	
Case Owner Account Name UA-VPPF-PUR Dawn Bodle	Email Log Interaction New Task	
Assigned User Contact Name User Dawn Bodle	Write an email	Compose

A new window opens and CRM prompts you to enter an Internal Comment explaining why the case is being closed. Internal Comments are not visible to the contact. They are only visible to other CRM users.

		-1	
		Close case	
* Status			
Closed			•
Internal Comments			
Sent contact steps rec	uired for initiating and	d submitting a check request.	
			•

Summarize the action you took on the case, then click **Save** to close the case.

Return to the PUR – Tier 1 list view. The case is now in the Assigned User's list view. Repeat the steps in this document until the PUR – Tier 1 list view is empty. This means all cases have been assigned to other users.

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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	1avez,	8/3/2021 12:3	7 PM			Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
ase Record Type I Core CRM	Case UA-\	Owner /PPF-SDM 🔊	Assigned User	navez	Status Closed	Ca OC	ase Number 0638983					
Details				Activit	ies	Related						
Case Owner UA-VPPF-SDM		Account Name Gina Stillions	1	Email	Log Inte	er?	New Task					
Assigned User	1	Contact Name Gina Stillions	1					Write an email			Com	pose
Status Closed		Contact Email gstillio@indiana.e	edu.test							Filters: All time •	All activities • All typ	pes
Priority Standard		Contact Phone								I	Refresh • Expand All	l • Viev
Parent Case		Email-to-Case Origin	1	∨ Upco	oming & Ov	erc						
		Origin of Case					To	No n get things moving, ac	ext steps. Id a task or set u	p a meeting.		
		web	<i>F</i>	Aug	ret - 2021						Thi	ie Mor

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.

Review the notes left in the Case Comments section. Remember to click **View All** if there have already been several comments logged on the case.

Case Comments (1))	New
User	Created Date	Comment
Sarah Chavez	8/3/2021 12:37 PM	Emailed contact and provided instructions for searching for a supplier in BUY.IU.
	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.

If your response resolves the issue, close the case. If you need to escalate the case to Tier 2, remember to follow the steps outlined in the <u>Escalate a Case document</u>.