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## Reassign a Case to Another Queue

Reassigning a case puts it in another CRM unit's to do list. Reassigning a case is appropriate if the original inquiry was directed to the wrong team (i.e. a supplier question was sent to Purchasing instead of SDM) or if the original unit needs to collaborate with another area to resolve the Contact's question.

Open the case that needs to be reassigned. Click the **pencil icon** next to Assigned User.

🚽 👸 Sarah C	Chavez, 8/2/2021 4:	31 PM		cione	Snaring	Neassign Queue	Crose Case	view case filefalcity	Change Status	Eu
ase Record Type J Core CRM	Case Owner UA-VPPF-PUR 🔊	Assigned User	Status New	Case 0063	Number 38872					
Details			Activities	Related						
Case Owner UA-VPPF-PUR	Account Name Y. Jaymee Zap	anta 🖉	Email Log	Interaction	New Task					
Assigned User Holly Hooper	Cont- me					Write an email.			Com	ipose
Status New	Contact sail <b>yzapanta@iu</b> .	edu.test						Filters: All time •	All activities • All typ	pes
Priority Standard	Contact Phone 317/965-4553							F	Refresh • Expand All	• Vie
Parent Case	Email-to-Case C	Irigin	✓ Upcoming &	2 Overdue						
	Origin of Case				То	No ne	ext steps. d a task or set u	n a meeting		

Click the "x" to clear the Assigned User field, then click Save.

Case	Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit			
Case Record Type IU Core CRM	Case Owner UA-VPPF-PUR 🔊	Assigned User	Status Der New	Case 0063	Number 38872					
Details			Activities	Related						
Case Owner	Account Name		Email Log Ir	nteraction	New Task					
UA-VPPF-PUR	Y. Jaymee Za	at X				Write an email			Com	pose
Assigned User	Contact Name									
Holly Hooper	Y. Jaymee 2	at X						Filters: All time •	All activities • All typ	oes 🔻
* Status	Connect Email	test							Refresh • Expand All	View All
New	yz malenicou	incor	V Upcoming & C	Overdue						
Priority	Cont Phone									
Standard	31 65-4553				То	No n get things moving, ad	ext steps. Id a task or set u	p a meeting.		
Parent Case	En :o-Case Origin	n								
Search Cases (	2				No past acti	vity. Past meetings an	d tasks marked a	s done show up here.		
	O( of Case	<b>_</b>								
✓ Details										
Topic										
Option 1 Car	ncel Save									

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Next, navigate to the **Case Comments** section of the **Related** tab and click **New** to log a new comment.

In the comment, describe what action or research has already been taken on the case and why the case is being reassigned. Click **Save**.

Case Owner	Assigned User	Status	Case Number		
UA-VPPF-	PUR 🔊	New	00638872		×
			New Case Comment		
	Information				
£	*Body				
	Hi SDM - this department su supplier in BUY.IU but their process/supplier contact S	ubmitted a suppor Registration Statu Sarah	rt form trying to locate an appropriate s is In Progress. Forwarding to you to	supplier. I was able to locate a see how far they got in the	Log Intera
					_
1				Cancel Sav	e
Or	rigin of Case	Case C	omments (0)		

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Next, notify the contact that you are forwarding their case to another group. Navigate to the **Activities** tab and write a message in the email pane as shown below. Click **Send** to send your message.

Details		Activities Related
Case Owner UA-VPPF-PUR	Account Name Y. Jaymee Zapanta	Email Log Interaction New Task
Assigned User	Contact Name Y. Jaymee Zapanta	From Sarah Chavez <estc@iu.edu></estc@iu.edu>
Status New	Contact Email yzapanta@iu.edu.test	To yzapanta@iu.edu.test X 2. Cc Bcc
Priority Standard	Contact Phone 317/965-4553	Subject Purchasing
Parent Case	Email-to-Case Origin	
	Origin of Case Web	Font - Size - Format -
Details  Topic Option 1  Subject Purchasing		I'm forwarding your question to the Supplier Data Management (SDM) team. They will be able to review the supplier's record and determine what action is needed. They will respond to this same email chain once they've taken a look. If you wish to follow up with them in the meantime, don't hesitate to reply to this message to reach them.
Description Phone Number: 31727489 Company: Purchasing Des What is the status of my of Web Email	978 Department or scription: TEST FORM - order?	Thank you, Sarah Sarah Chavez Senior Training & Communication Specialist VPCFO Training & Communications estc@in_edu
∨ Details		Ø □ □ □     Ø □ □     Send     Send

Finally, click **Reassign Queue** in the upper right-hand corner to reassign the case to the appropriate CRM unit.

Case 😸 Sarah Cł	navez.	8/2/2021 4:34 PM		Clone	Sharing	Reassign Queue	Close case	View Case Hierarchy	Change Status	Edit
Details			Activitie	<b>es</b> Related						
Case Owner UA-VPPF-PUR Assigned User	2	Account Name Y. Jaymee Zapanta Contact Name Y. Jaymee Zapanta	Email	Log Interaction	New Task	Win email			Com	pose
Status New Priority Standard	1	Contact Email yzapanta@iu.edu.test Contact Phone 317/965-4553						Filters: All time •	All activities • All typ Refresh • Expand All	pes 🔻
Parent Case	1	Email-to-Case Origin Origin of Case	∨ Upcor	ning & Overdue	То	No ne: get things moving, add	kt steps. I a task or set u	p a meeting.		
∨ Details		web	✓ Augus	st • 2021					Thi	is Month

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Select the appropriate queue from the drop-down list. This list contains ALL CRM units at IU, not just those associated with VPCFO. Review the <u>VPCFO Division CRM Unit document</u> for a current list of units within our division.

After clicking the drop-down menu, type the first view letters of the CRM unit you're looking for to jump to that part of the list. In this example, we'll reassign a case to the SDM team, CRM unit UA-VPPF-SDM.

Finally, uncheck the box next to **Retain Visibility**. This means members of your CRM unit will not be able to access the case or see it on the Contact's profile after it is reassigned. This is appropriate in most cases.

Leave the box checked if you will be collaborating with the other CRM unit on the case. This allows both your unit and theirs to interact with the case, log comments, etc.

You will not be able to undo this action! Double check your selections, then click **Next** to reassign the case, then click **Finish**.

	Email Log In	teraction	New Task			×	
			Reassign Q	ueue			
Peaceign	Queue						
* Reassign Case	e to Queue:						
UA-VPPF-SD	M ke your queue to retain	visibility of thi	is case after reassignn	nent, mark the <i>Retain Vi</i> .	sibility checkbox.	ŧ	
Retain Visi	bility 1	2	2				mee
						Next	
	iou sent a		аутнее даратка				

The case has been reassigned. If you unchecked the reassign box it will no longer appear in your CRM unit's open cases. If you retained visibility the case will still be visible to you but be assigned to the new CRM unit.

Cases 1 Result								
Case Number 🗸	Contact Name	~ W ~	Subject	Status	Date/Time Opened	/ Da ~	Owner Name 🗸 🗸	
00638872	Y. Jaymee Zapanta		Purchasing	New	7/7/2021 8:43 AM		UA-VPPF-SDM	•