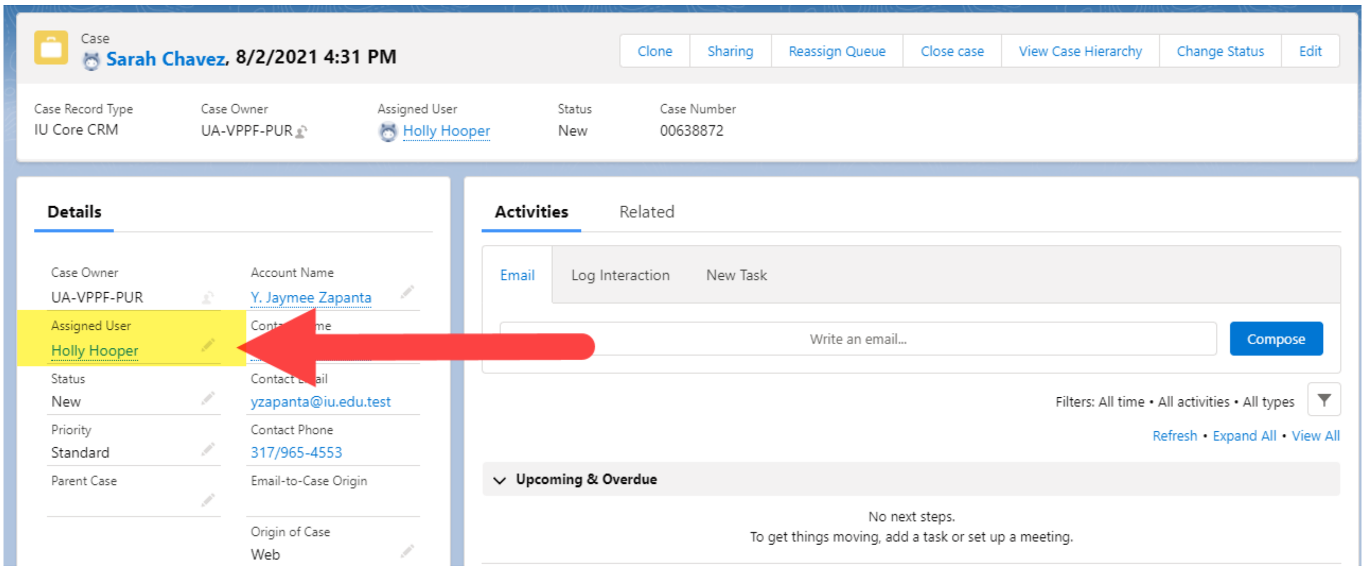
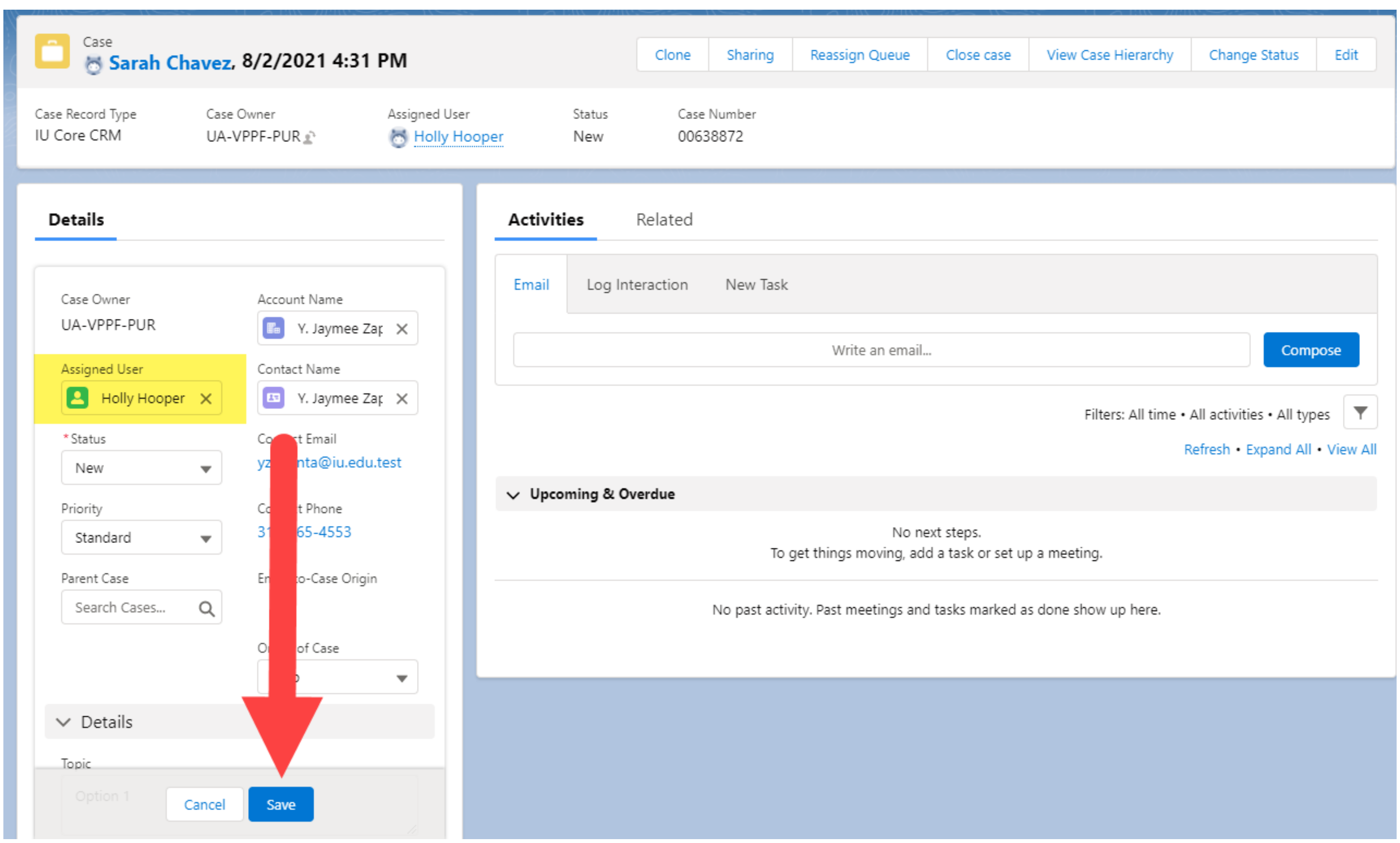
Reassign a Case to Another Queue

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.

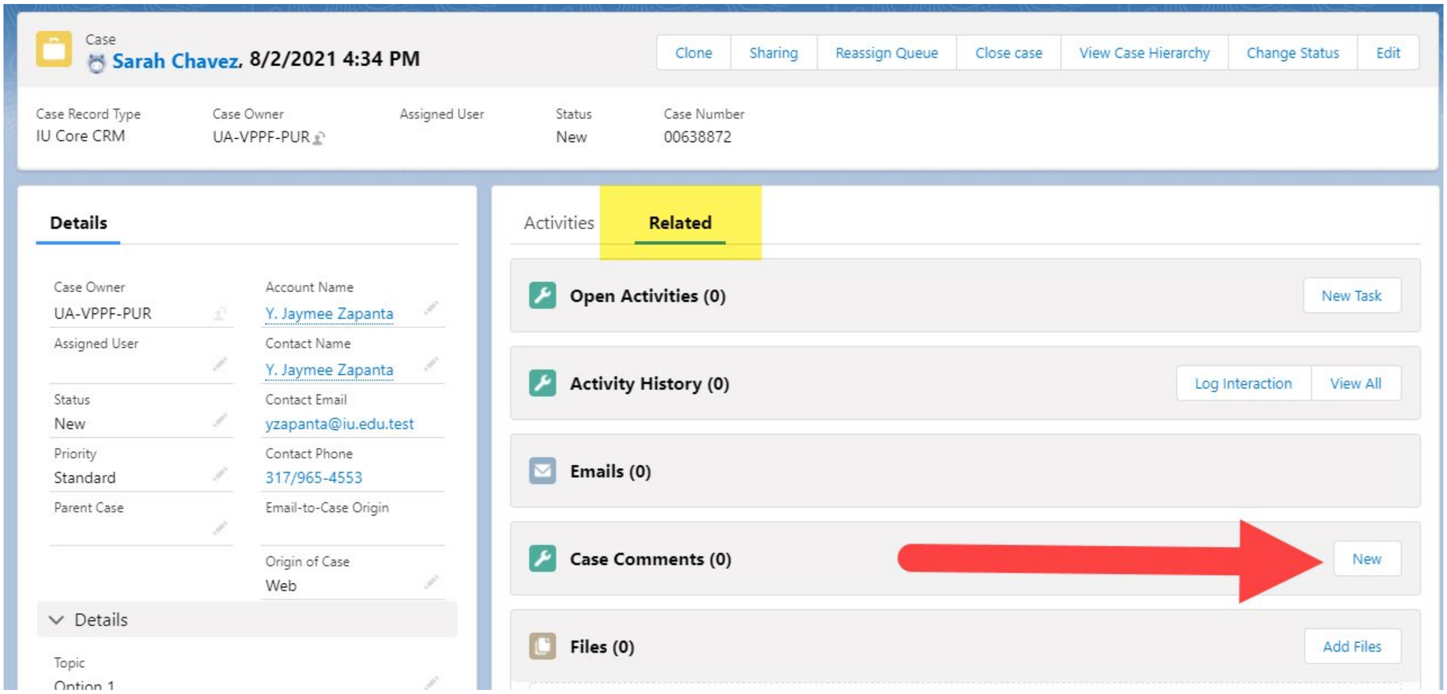
Open the case that needs to be reassigned. Click the **pencil icon** next to Assigned User.



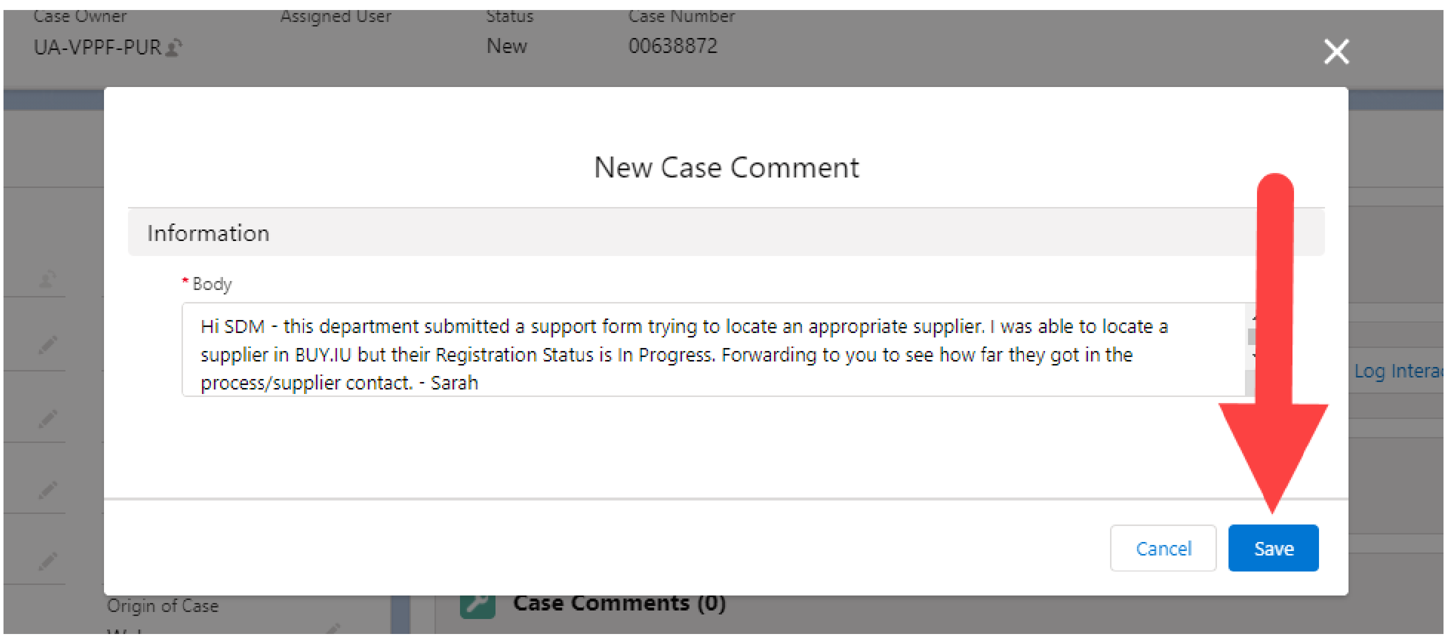
Click the "**x**" to clear the Assigned User field, then click **Save**.



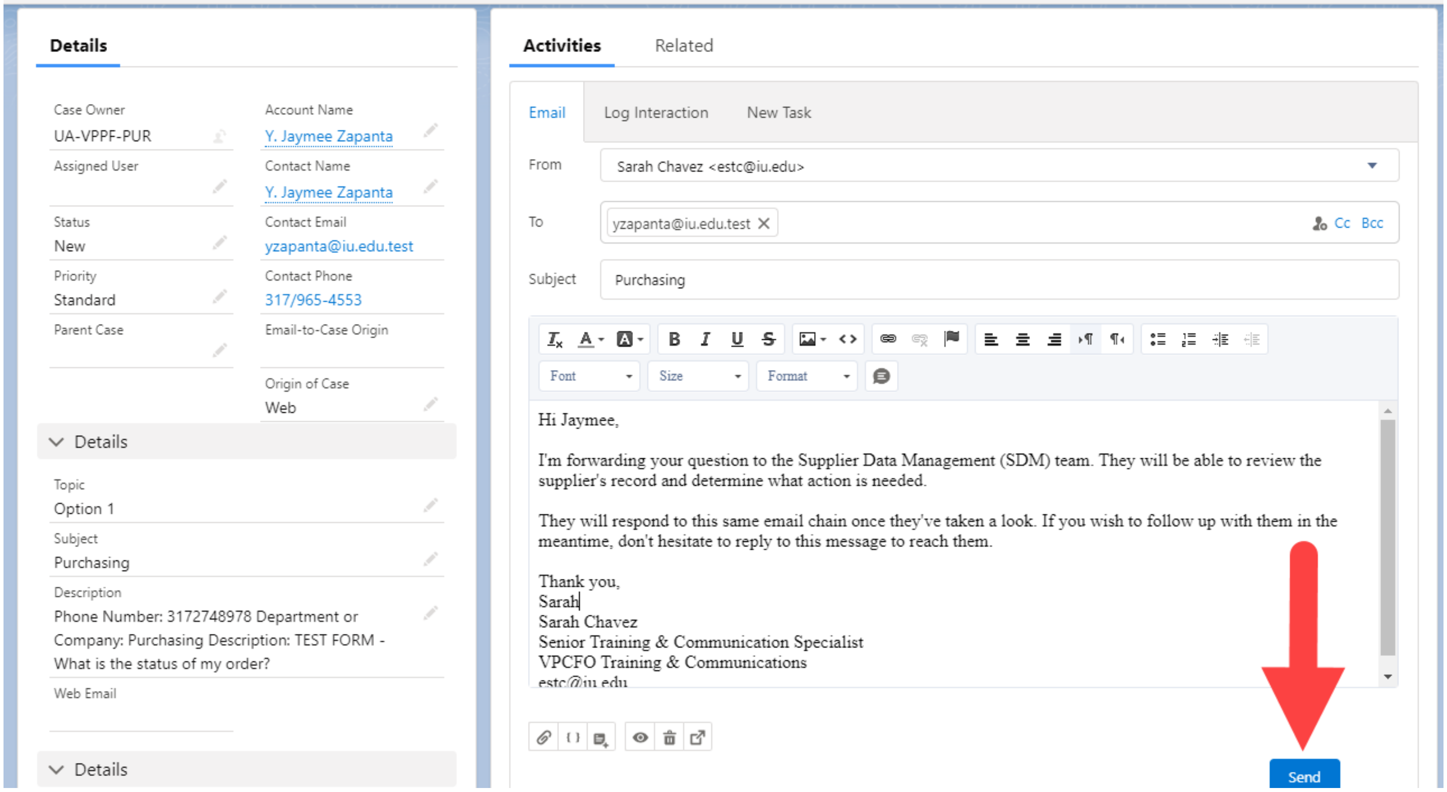
Next, navigate to the **Case Comments** section of the **Related** tab and click **New** to log a new comment.



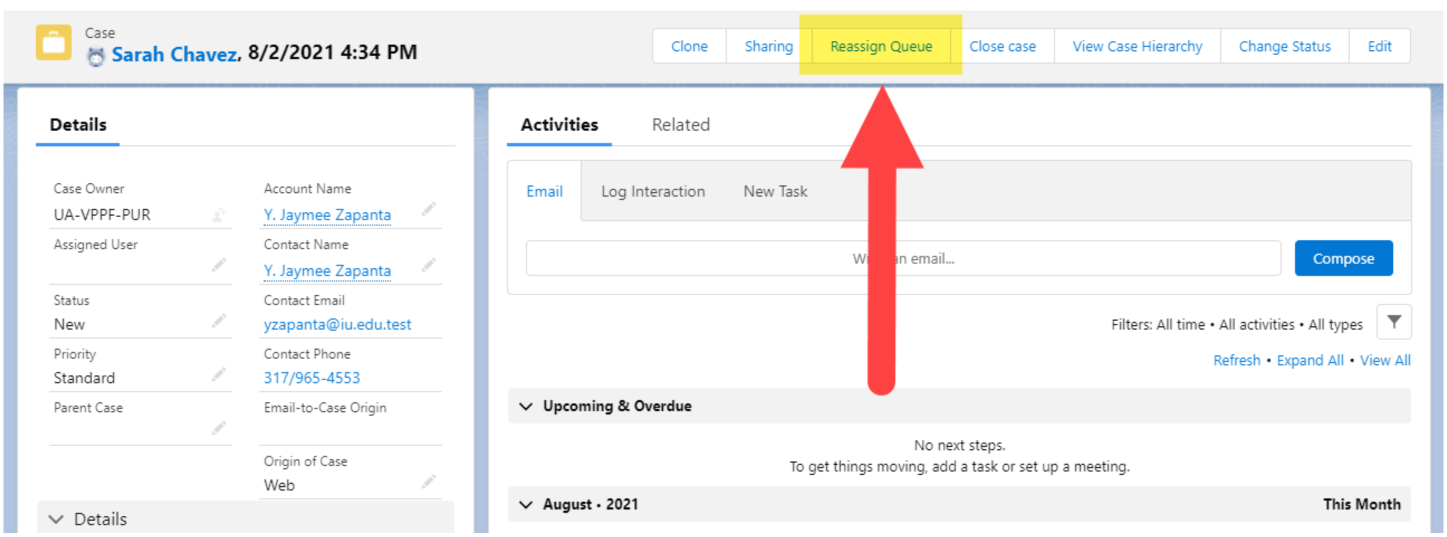
In the comment, describe what action or research has already been taken on the case and why the case is being reassigned. Click **Save**.



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.



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



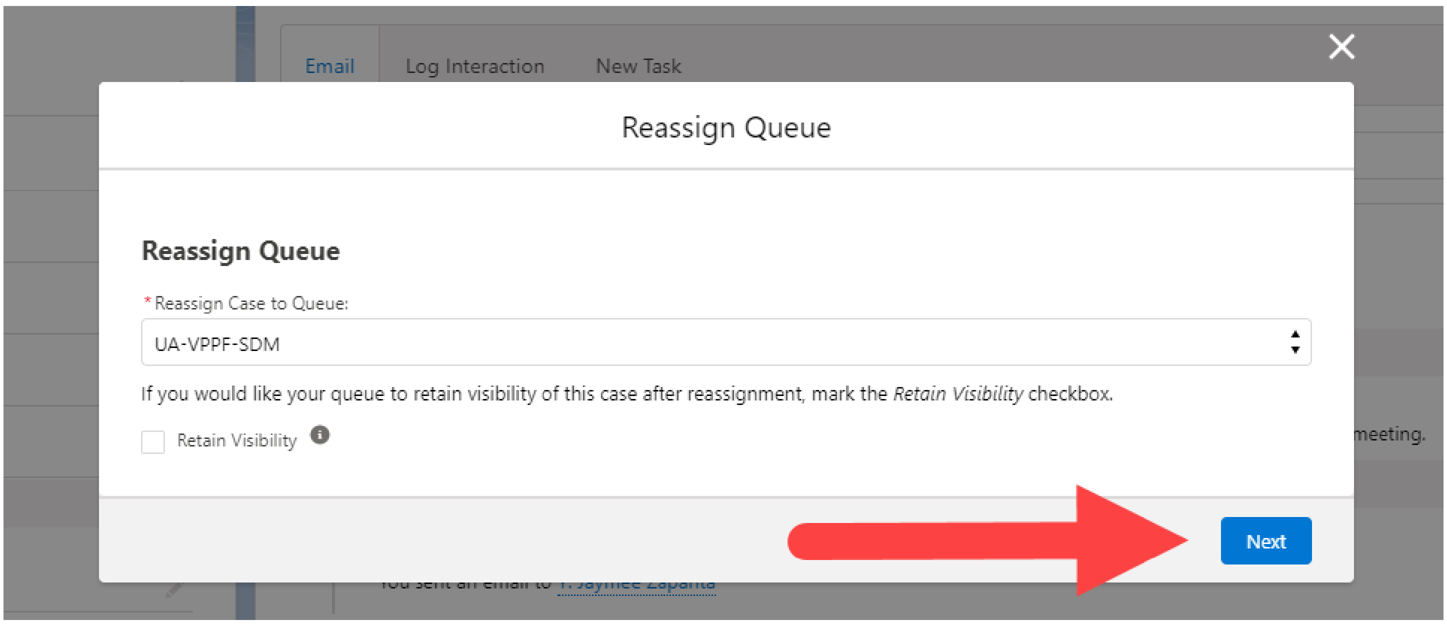
Select the appropriate queue from the drop-down list. This list contains ALL CRM units at IU, not just those associated with VPCFO. Review the [VPCFO Division CRM Unit document] for a current list of units within our division.

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**.



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.