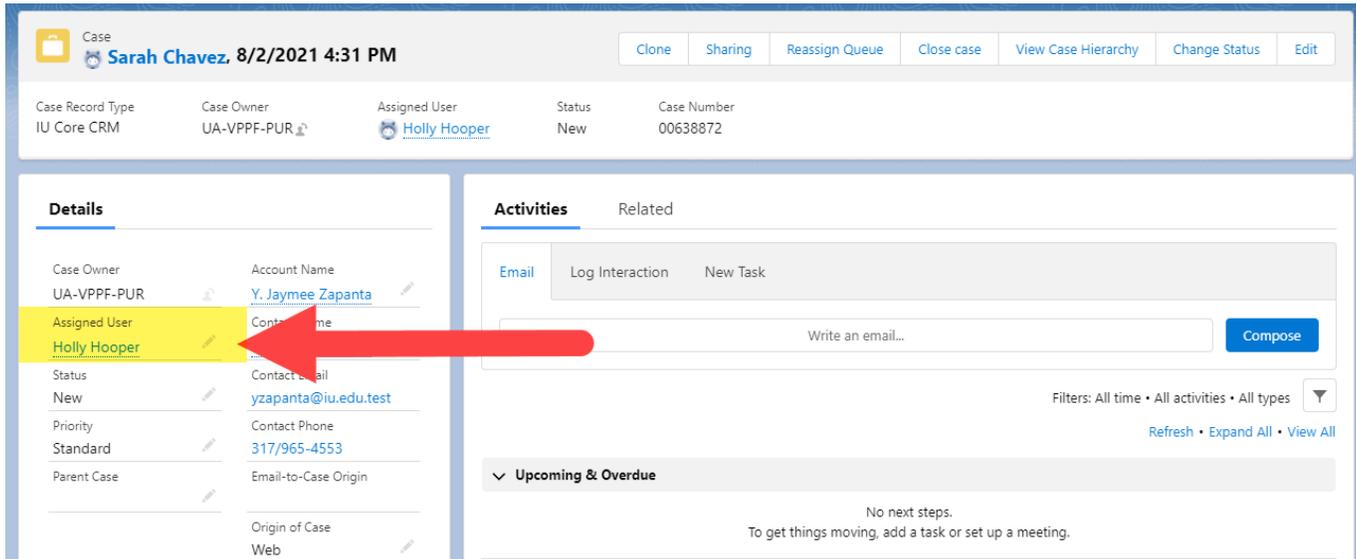




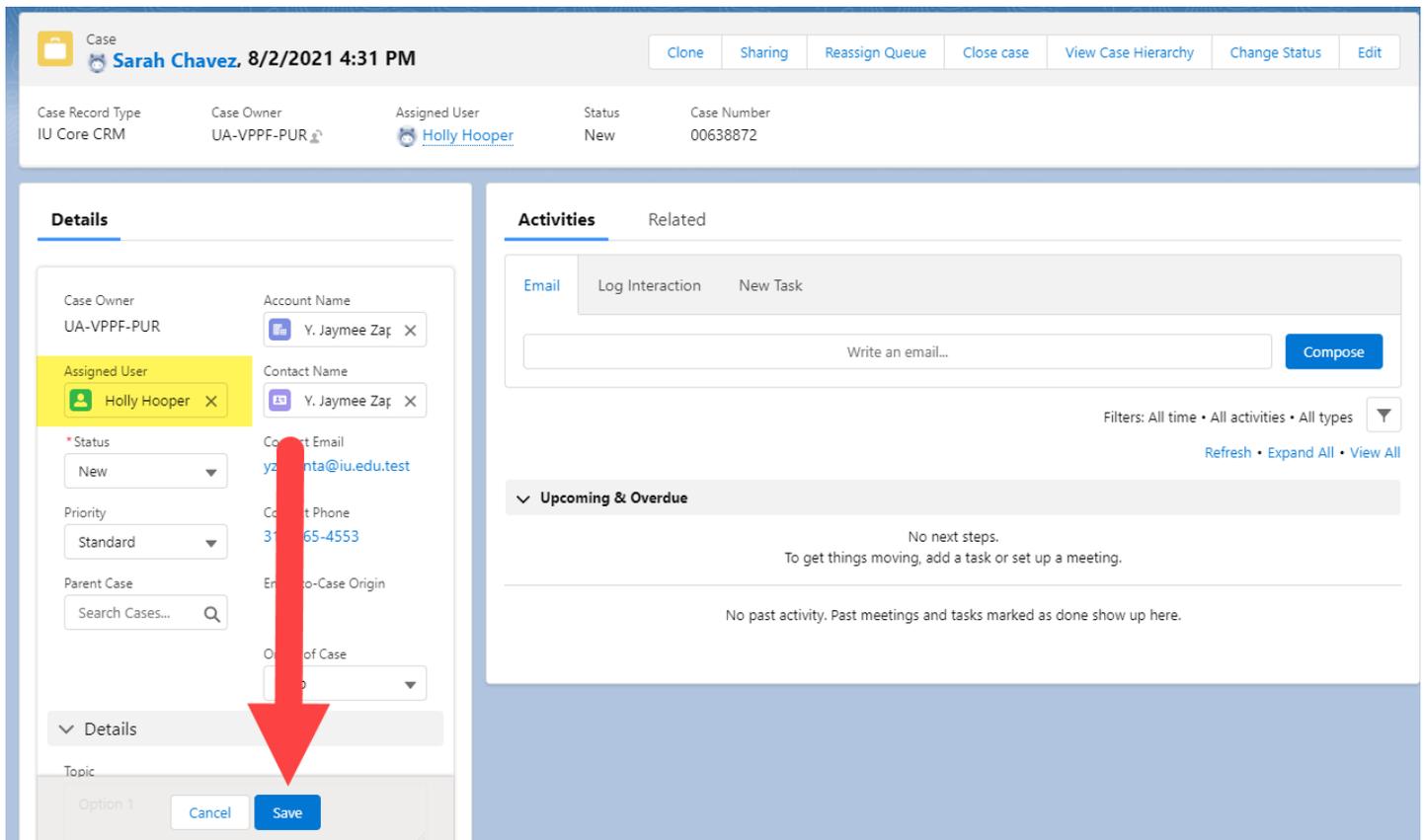
# Reassign a Case to Another Queue

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.

The screenshot shows a Salesforce Case record for Sarah Chavez, dated 8/2/2021 at 4:34 PM. The case record type is IU Core CRM, assigned to Y. Jaymee Zapanta, with a status of New and case number 00638872. The 'Related' tab is selected, displaying several activity sections: Open Activities (0), Activity History (0), Emails (0), Case Comments (0), and Files (0). A red arrow points to the 'New' button in the Case Comments section.

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

The screenshot shows the 'New Case Comment' dialog box. The 'Body' field contains the text: "Hi SDM - this department submitted a support form trying to locate an appropriate supplier. I was able to locate a supplier in BUY.IU but their Registration Status is In Progress. Forwarding to you to see how far they got in the process/supplier contact. - Sarah". A red arrow points to the 'Save' button.



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.

The screenshot shows the Salesforce interface with two main panels. On the left is the 'Details' panel for a case, and on the right is the 'Activities' panel. The 'Activities' panel is currently showing an email composition window. The email is addressed to 'yzapanta@iu.edu.test' with the subject 'Purchasing'. The body of the email contains the following text:

Hi Jaymee,

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.

Thank you,  
Sarah  
Sarah Chavez  
Senior Training & Communication Specialist  
VPCFO Training & Communications  
estc@iu.edu

A red arrow points to the 'Send' button at the bottom right of the email composition window.

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

The screenshot shows the Salesforce interface with the 'Reassign Queue' button highlighted in yellow in the top right corner. The interface shows the case details for 'Sarah Chavez' and the 'Activities' panel. The 'Reassign Queue' button is located in the top right corner of the interface, next to other buttons like 'Clone', 'Sharing', 'Close case', 'View Case Hierarchy', 'Change Status', and 'Edit'. A red arrow points to the 'Reassign Queue' button.



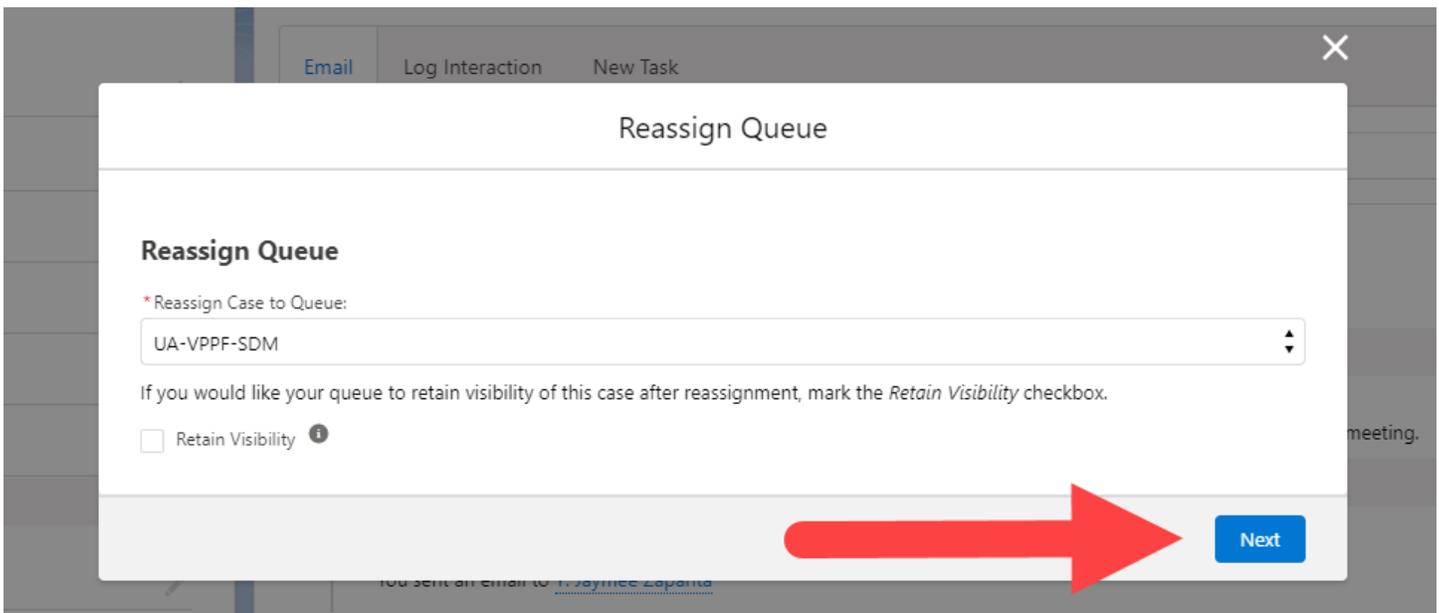
Select the appropriate queue from the drop-down list. This list contains ALL CRM units at IU, not just those associated with VPCFO. Review the [VPCFO Division CRM Unit document](#) for a current list of units within our division.

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.

Cases							
1 Result							
Case Number	Contact Name	W...	Subject	Status	Date/Time Opened	Da...	Owner Name
00638872	Y. Jaymee Zapanta		<a href="#">Purchasing</a>	New	7/7/2021 8:43 AM		UA-VPPF-SDM