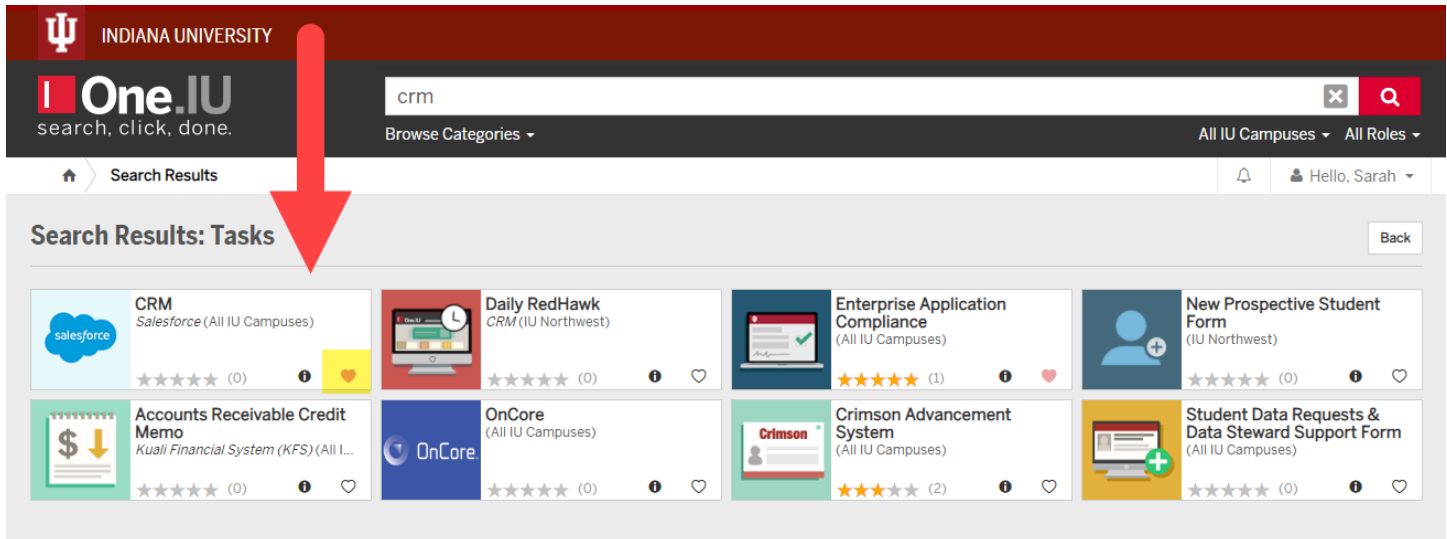


SDM: Work a Case

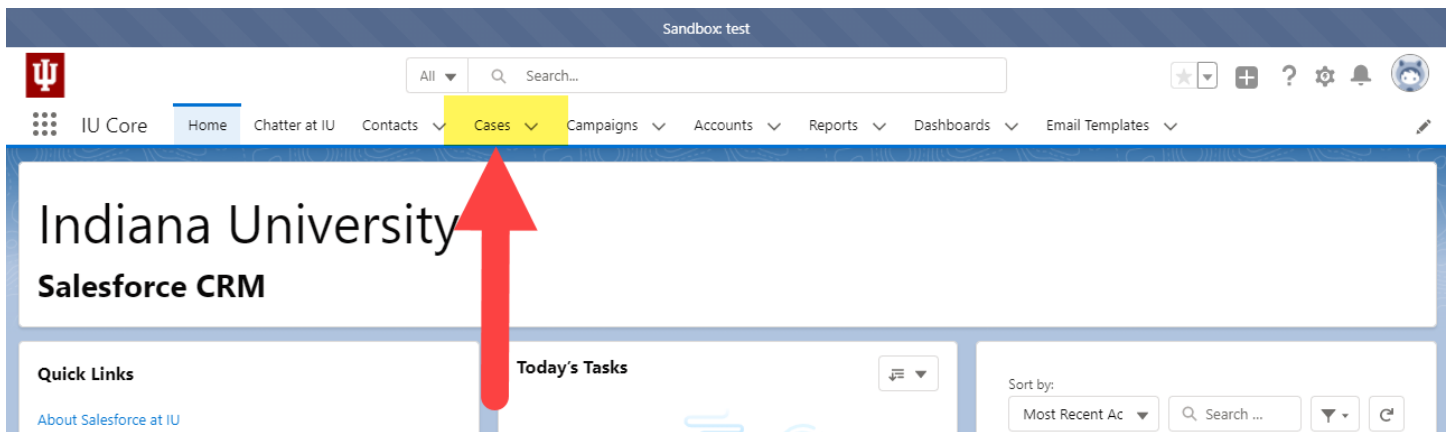
This document walks through the review process of new CRM cases by SDM staff.

[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.



Once logged in, click the **Cases** tab.



If you haven't already, locate the **SDM Open Cases** list view for your CRM unit 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**.

UI Elements: IU Core, Home, Chatter at IU, Contacts, Cases, Campaigns, Accounts, Reports, Dashboards, Email Templates.

Search: Search Cases and more...

Buttons: New, Change Status

Table Headers: Case..., Origin, Subject, Topic, Status, Assigne..., Pri..., Contact Name, Date/Time Op..., Last Modifi...

	Case...	Origin	Subject	Topic	Status	Assigne...	Pri...	Contact Name	Date/Time Op...	Last Modifi...
1	006389...	Web	SDM	Option 2	New	Standa...		Gina Stillions	7/16/2021 1:06 PM	7/16/2021 1:06 PM
2	006389...	Web	SDM	Option 1	New	Standa...		Terri Loyal	7/16/2021 1:07 PM	7/16/2021 1:07 PM
3	006389...	Web	SDM	Option 2	New	Standa...		Terri Loyal	7/16/2021 1:07 PM	7/16/2021 1:07 PM
4	006389...	Web	SDM	Option 2	New	Standa...		Lisa Burchenson	7/16/2021 1:07 PM	7/16/2021 1:07 PM
5	006389...		FW: Voice Mail (29 seconds)		New	Standa...			7/16/2021 1:22 PM	7/16/2021 1:22 PM
6	006390...	Web	SDM		In-Progre...	Amanda Coats	Standa...	Amanda Test	7/19/2021 12:41 PM	7/19/2021 12:42 PM

In the Details section, click the **pencil icon** next to Assigned User to edit the fields in this section.

Case: Convergence Cloud Service Account, 7/16/2021 1:06 PM

Buttons: Clone, Sharing, Reassign Queue, Close case, View Case Hierarchy, Change Status, Edit

Case Record Type: IU Core CRM

Case Owner: UA-VPPF-SDM

Assigned User: [Pencil Icon]

Status: New

Priority: Standard

Parent Case:

Details:

- Case Owner: UA-VPPF-SDM
- Account Name: Gina Stillions
- Assigned User: [Pencil Icon]
- Status: New
- Priority: Standard
- Parent Case:
- Contact Name: [Pencil Icon]
- Contact Email: gstillio@indiana.edu.test
- Contact Phone: [Redacted]
- Email-to-Case Origin
- Origin of Case: Web

Activities: Related

Email: Log Interaction, New Task

Write an email... [Compose]

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

Details

Case Owner: UA-VPPF-SDM

Assigned User: Sarah Chavez

Status: In-Progress

Priority: Standard

Parent Case: Search Cases...

Account Name: Gina Stillions

Contact Name: Gina Stillions

Contact Email: gstillio@indiana.edu.t...

Contact Phone: [Redacted]

Email-to-Case Origin

Origin of Case: Web

Cancel Save

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.
4. **Contact:** if the Contact field is blank, search for the contact. If the contact is not available in CRM, follow the steps outlined in [Manually Create a Contact](#) 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, then scroll back up to the Activities tab to respond to the case.

Click in the “Write an email...” box to open the email tool.

Case: Sarah Chavez, 8/3/2021 10:41 AM

Case Record Type: IU Core CRM | Case Owner: UA-VPPF-SDM | Assigned User: Sarah Chavez | Status: In-Progress | Case Number: 00638983

Details

Case Owner: UA-VPPF-SDM

Assigned User: Sarah Chavez

Status: In-Progress

Priority: Standard

Parent Case:

Account Name: Gina Stillions

Contact Name: Gina Stillions

Contact Email: gstillio@indiana.edu.test

Contact Phone: [Redacted]

Email-to-Case Origin:

Activities Related

Email Log Interaction New Task

Write an email... Compose

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No next steps.

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

Activities Related

Email Log Interaction New Task

From asksdm@iu.edu <asksdm@iu.edu>

To gstillio@indiana.edu.test X Cc Bcc

Subject SDM

Rich Text Editor:

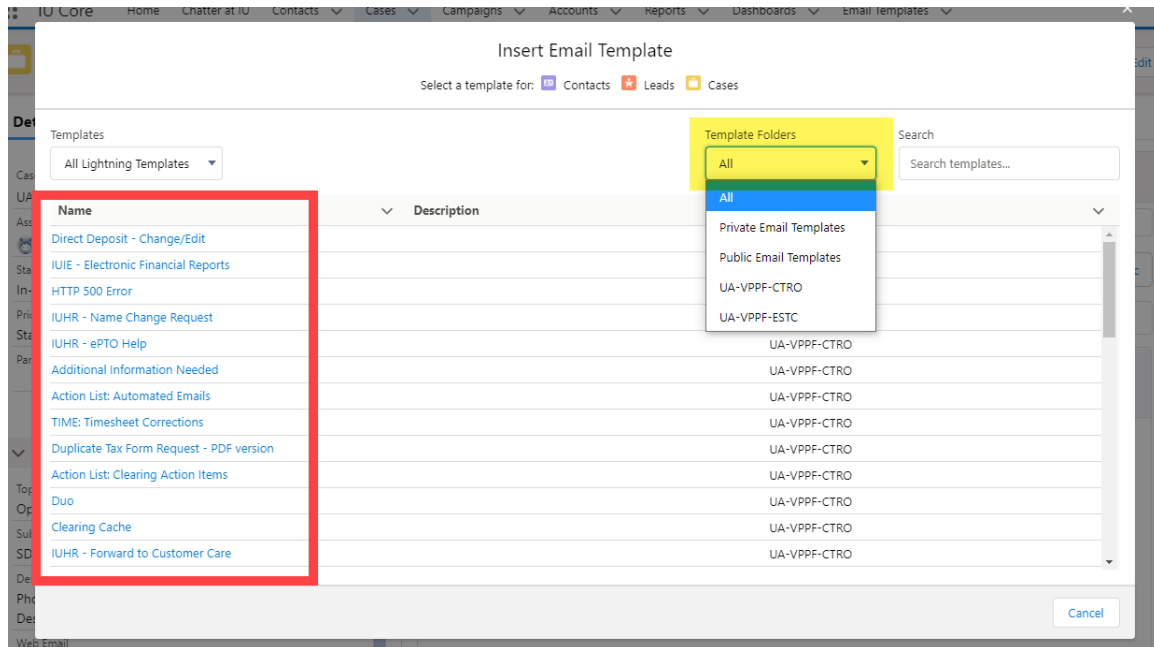
Font Size Format

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

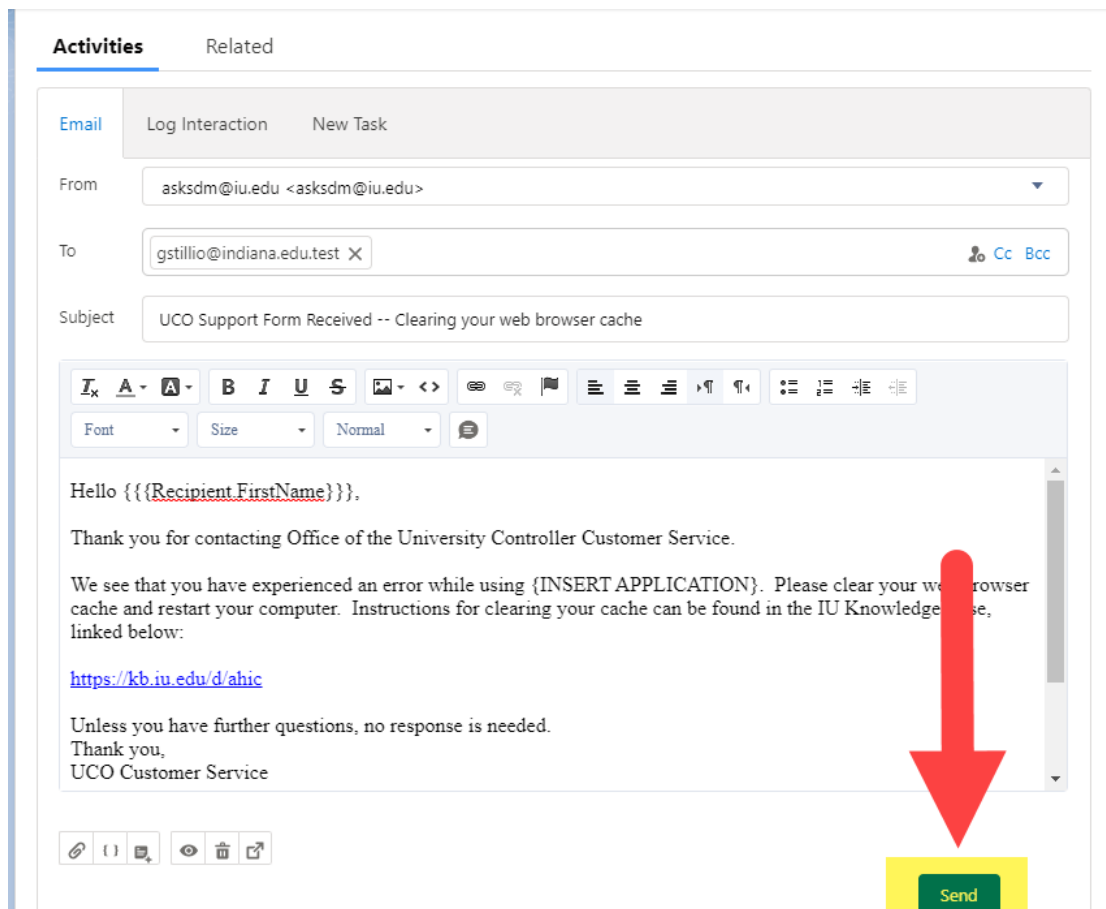
Bottom Toolbar: Insert Template (highlighted in yellow)

Send

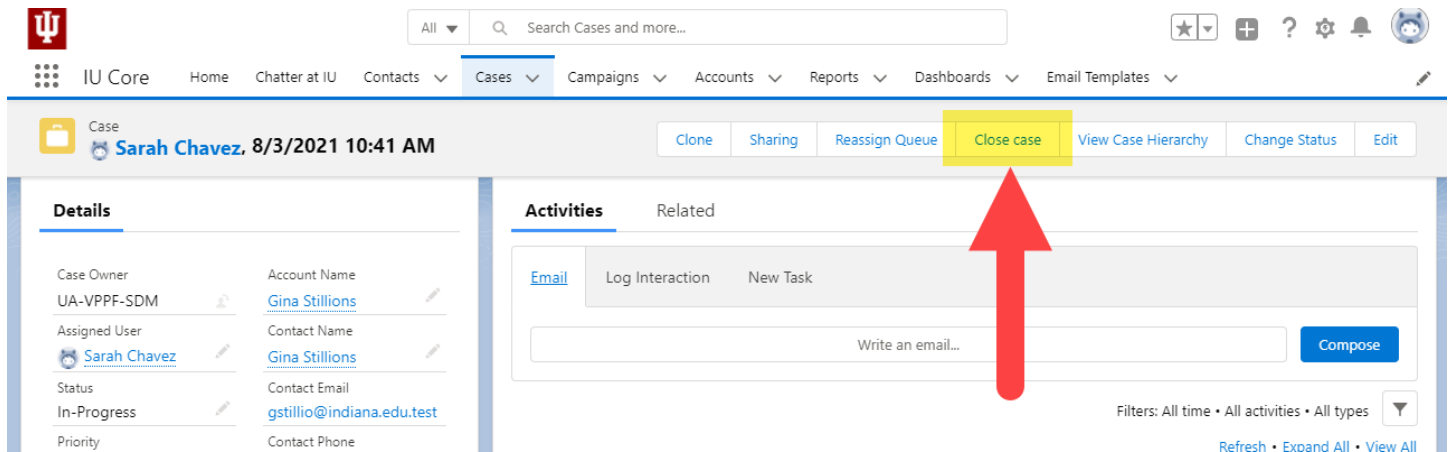
After clicking the template icon, select **Insert a template...** and a new window opens. Select your CRM unit from the **Template Folders** drop-down menu, then click the **name of the template** in the left-hand column to insert it into your email.



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.

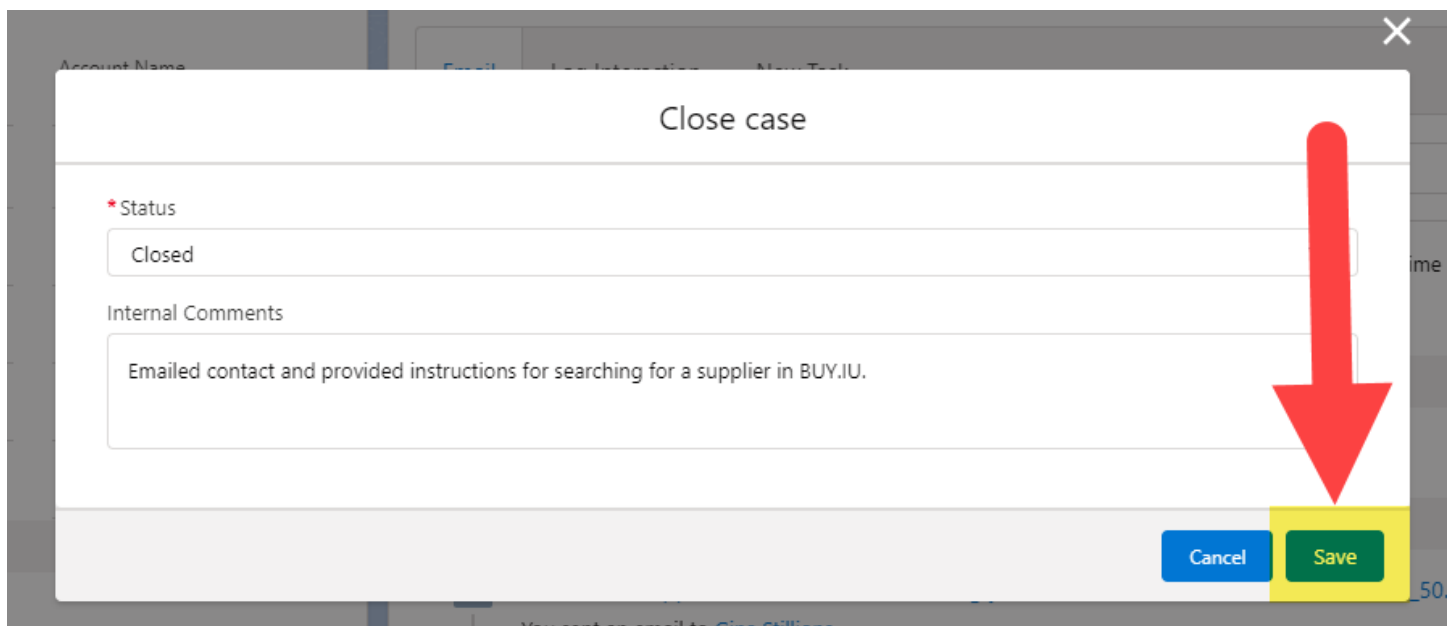


Finally, click **Close case** in the upper right-hand corner.



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.

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



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: Sarah Chavez, 8/3/2021 12:37 PM

Case Record Type: IU Core CRM | Case Owner: UA-VPPF-SDM | Assigned User: Sarah Chavez | Status: Closed | Case Number: 00638983

Details

- Case Owner: UA-VPPF-SDM
- Assigned User: Sarah Chavez
- Status: Closed
- Priority: Standard
- Parent Case:
- Account Name: Gina Stillions
- Contact Name: Gina Stillions
- Contact Email: gstillio@indiana.edu.test
- Contact Phone: [REDACTED]
- Email-to-Case Origin:
- Origin of Case: Web

Activities | **Related**

Email | Log Interaction | New Task

Write an email... [Compose]

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

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.

After responding, remember to close the case. If you called the contact or followed up on the case in some other way, be sure to include those details in the Internal Comments you log when closing the case.