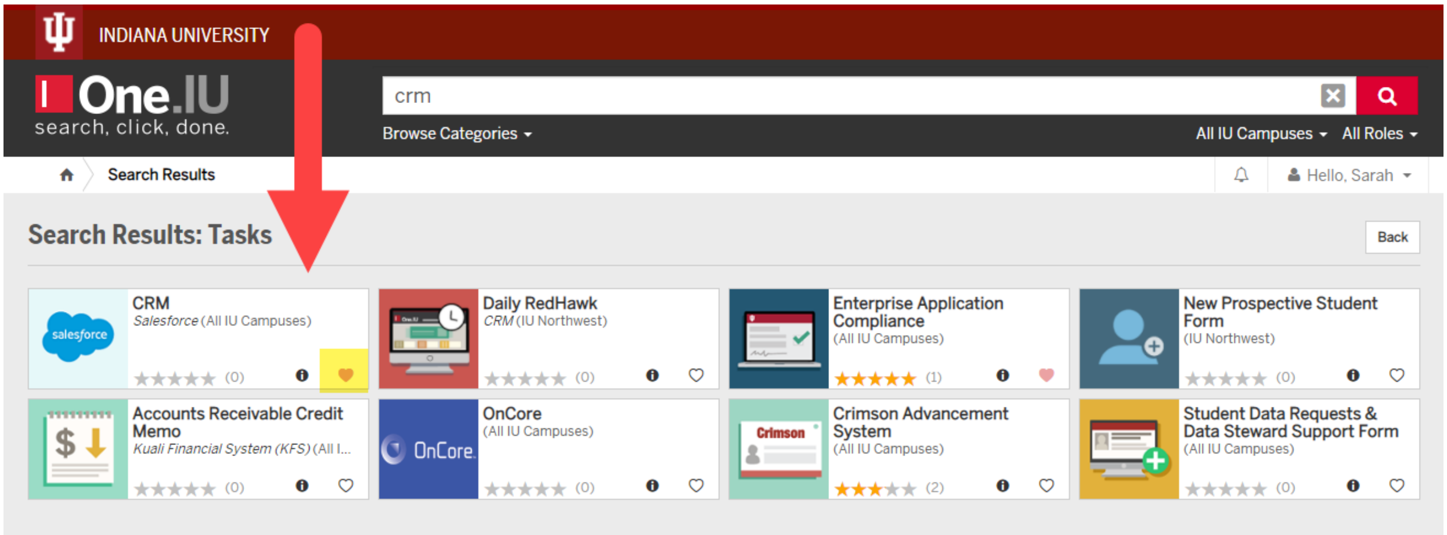
SDM: Work a Case

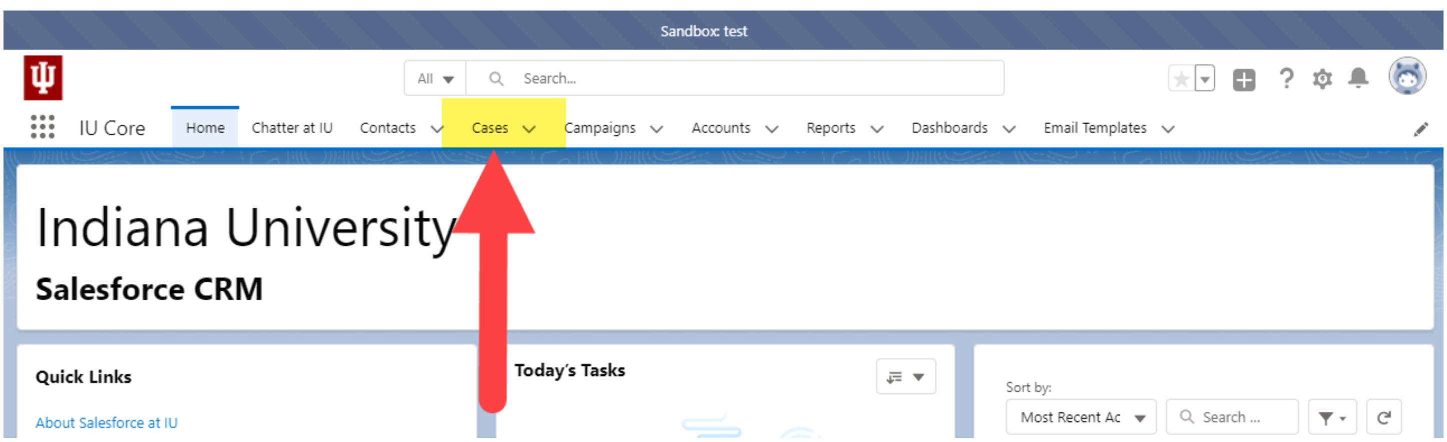
This document walks through the review process of new CRM cases by SDM staff.

[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.

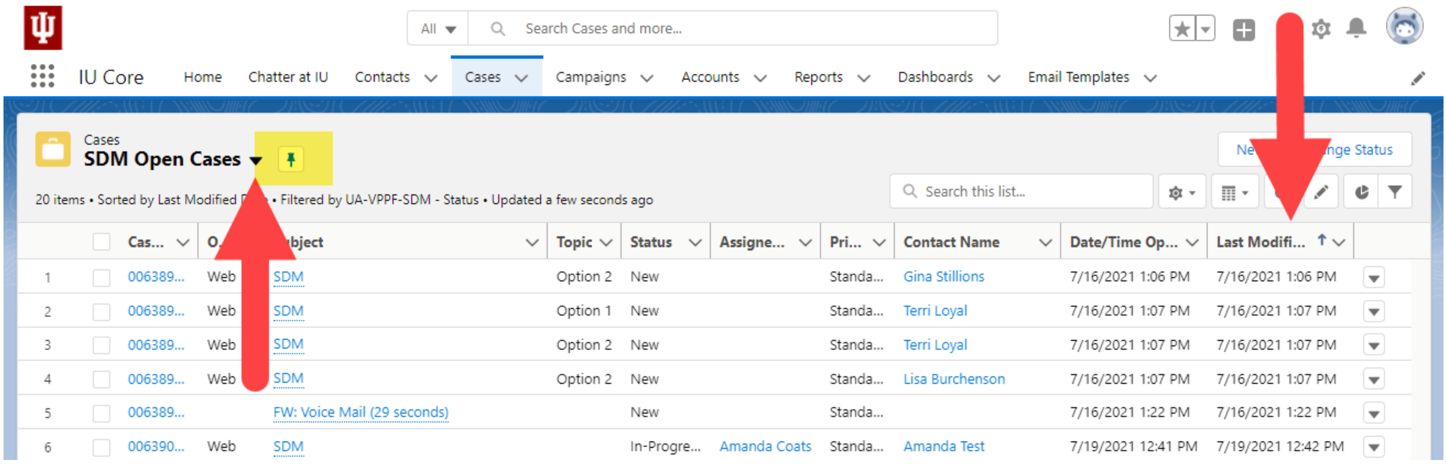


Once logged in, click the **Cases** tab.

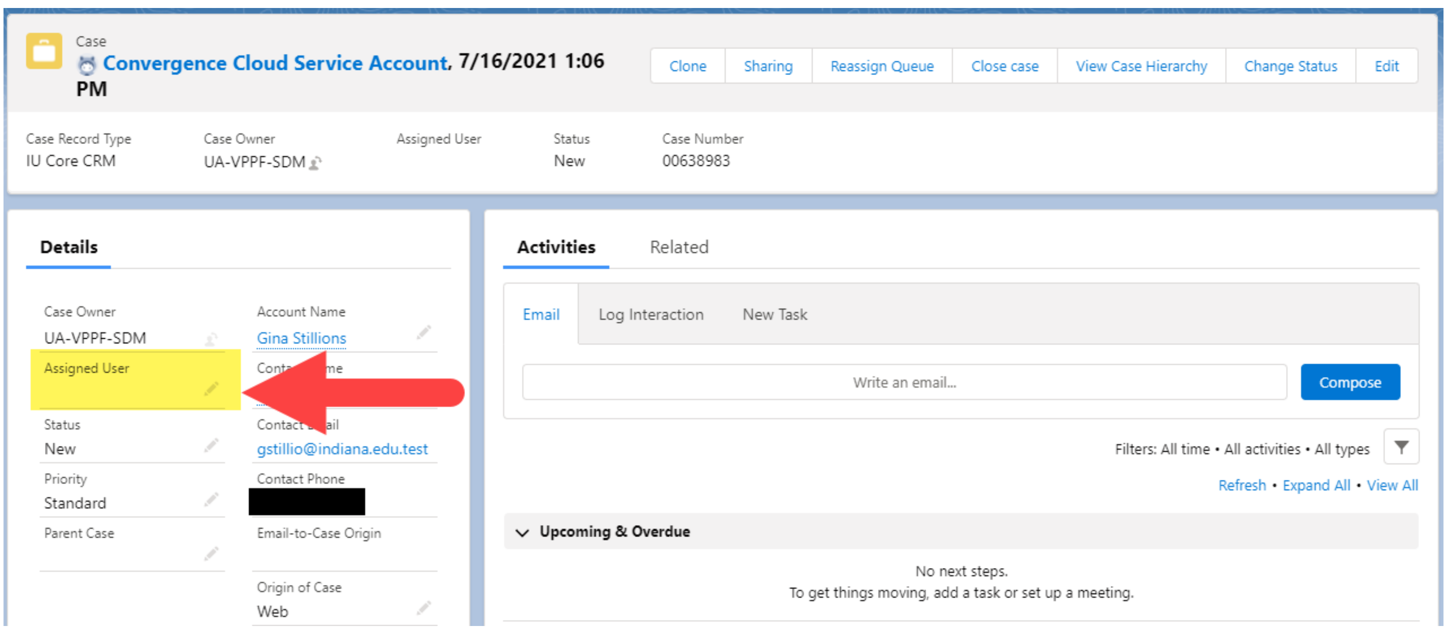


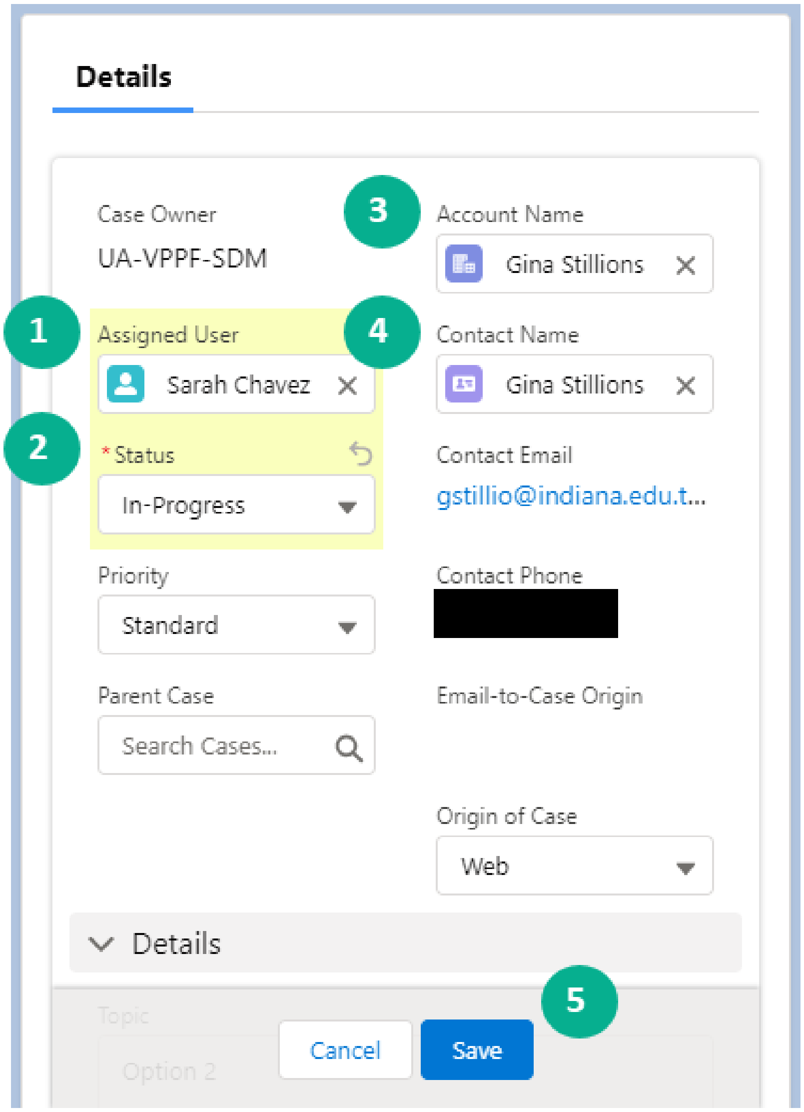
If you haven't already, locate the **SDM Open Cases** list view for your CRM unit by clicking the **down arrow**, then click the **push pin** to make it your default list view.

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**.



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

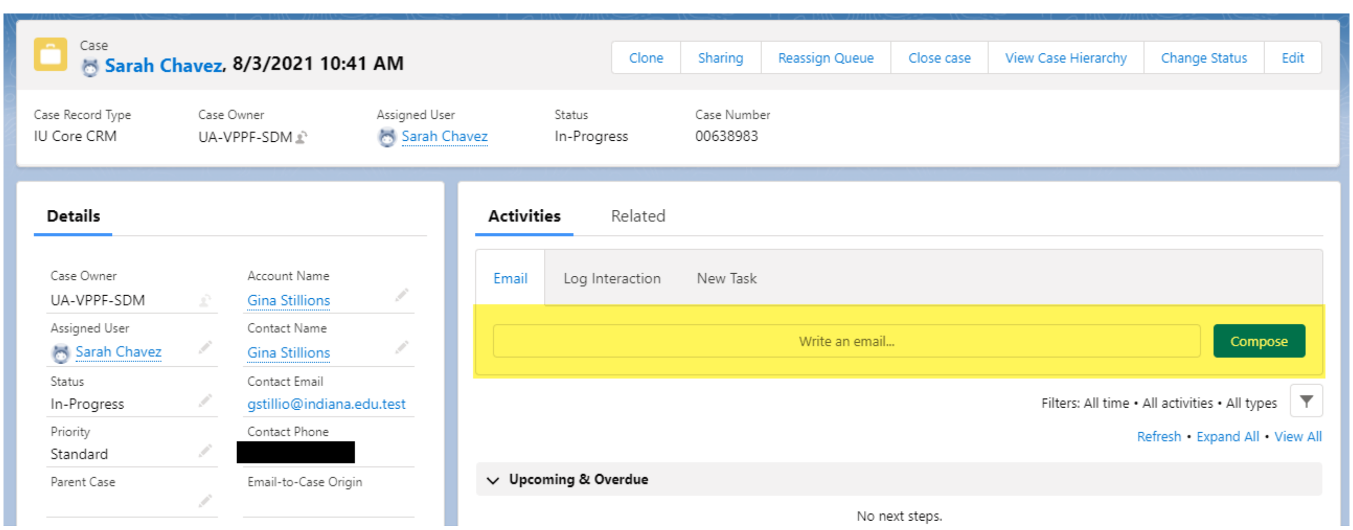




1. **Assigned User**: search for your name and assign the case to yourself.
2. **Status**: select In-Progress from the drop-down menu.
3. **Account Name**: if this case involves a supplier company contact, click the "x" in the Account Name field and search for the supplier name. If the company is not 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.

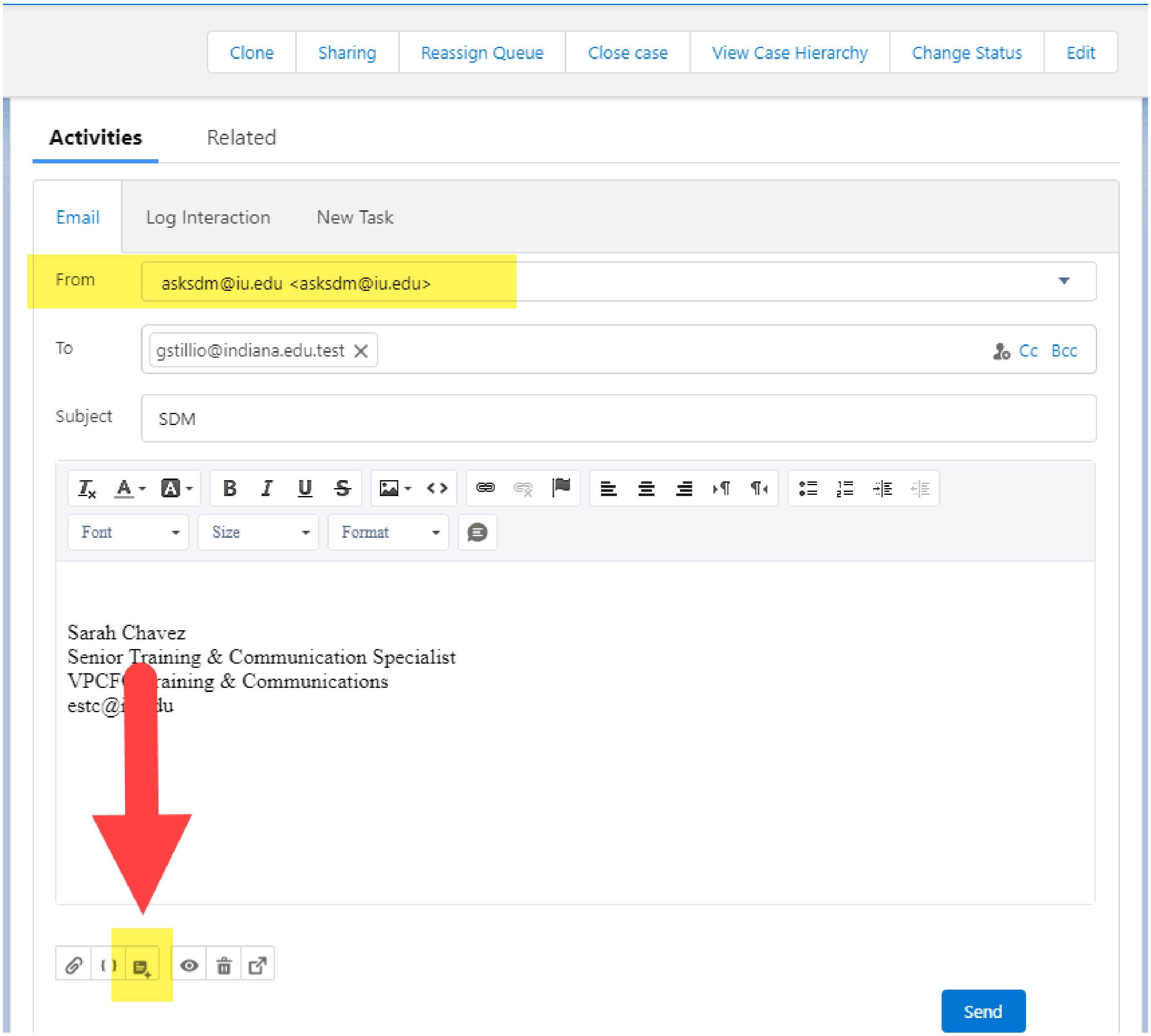
Click in the "**Write an email…**" box to open the email tool.



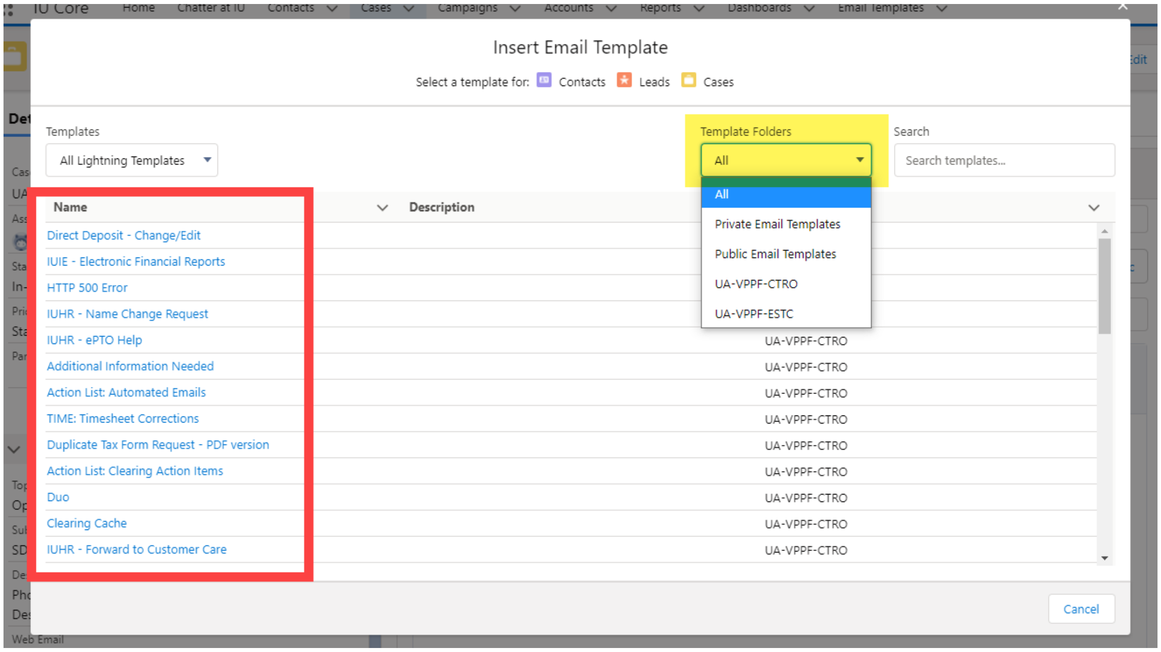
Make sure the **From** email address reflects your group account, asksdm@iu.edu. The Subject line will auto populate.

The email tool works similarly to Outlook or other email clients. You can change fonts, bold, insert screen shots, etc.

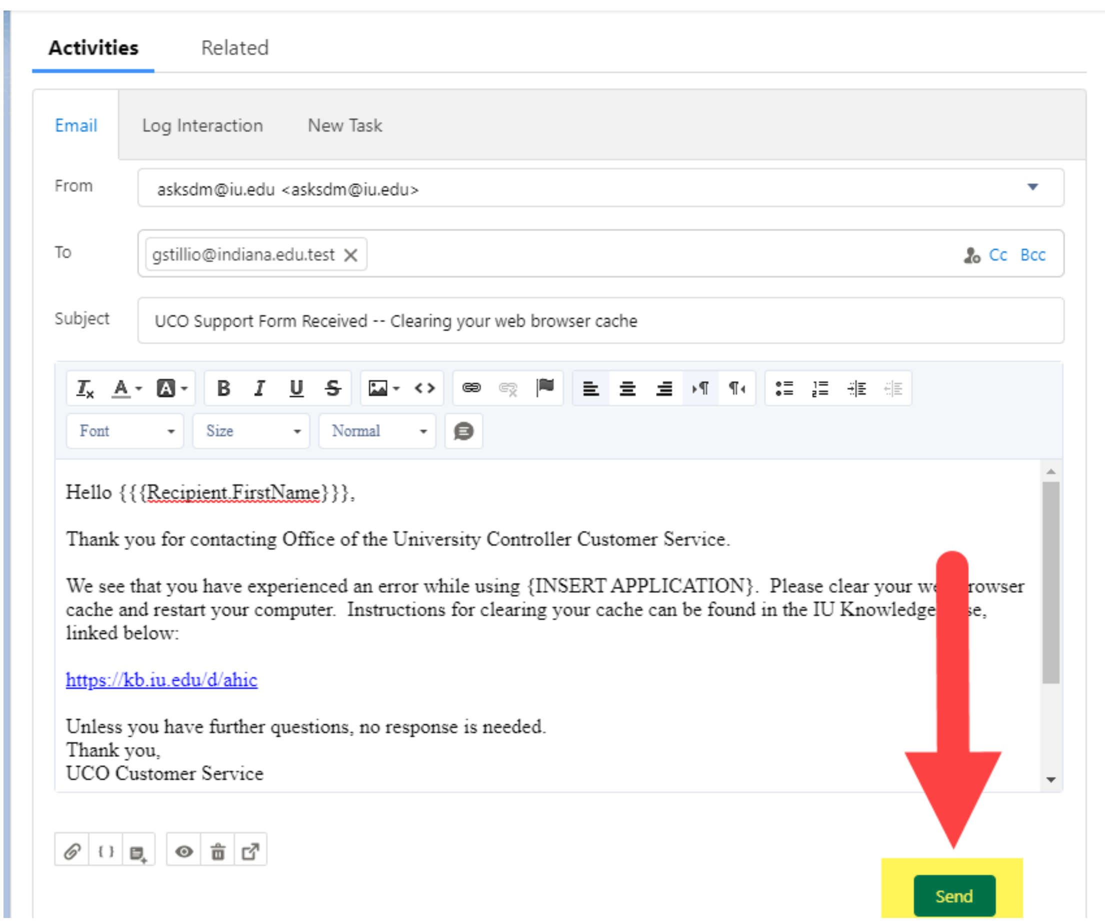
A different feature of CRM is the ability to use shared templates. These are pat responses available to your CRM unit only that you can insert into the email tool. Click the **paper icon with the +** sign to select a pat response.



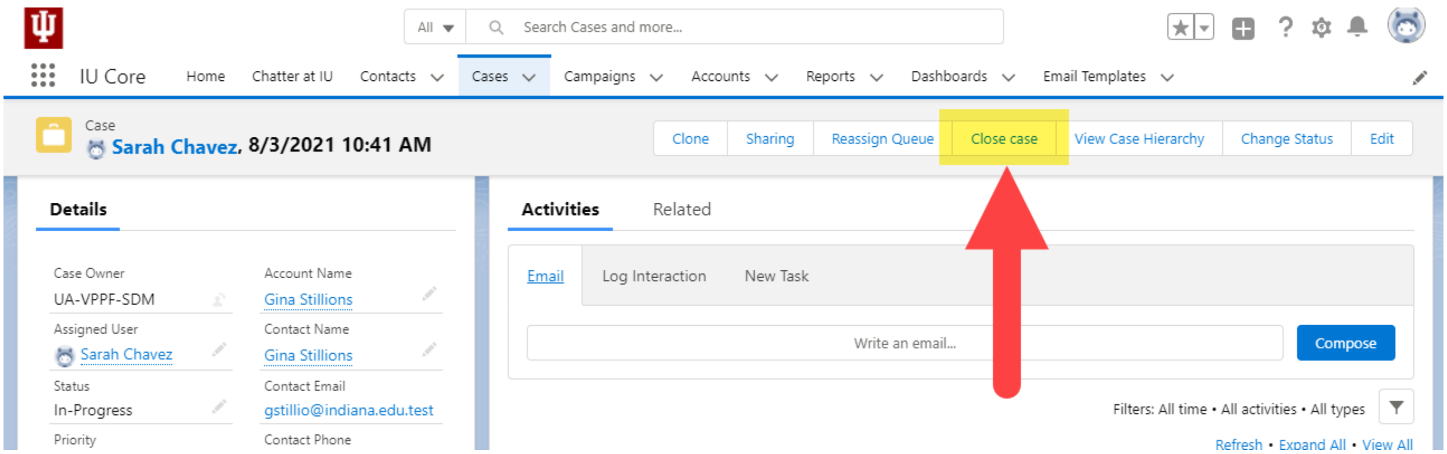
After clicking the template icon, select **Insert a template…** and a new window opens. Select your CRM unit from the **Template Folders** drop-down menu, then click the **name of the template** in the left-hand column to insert it into your email.



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.

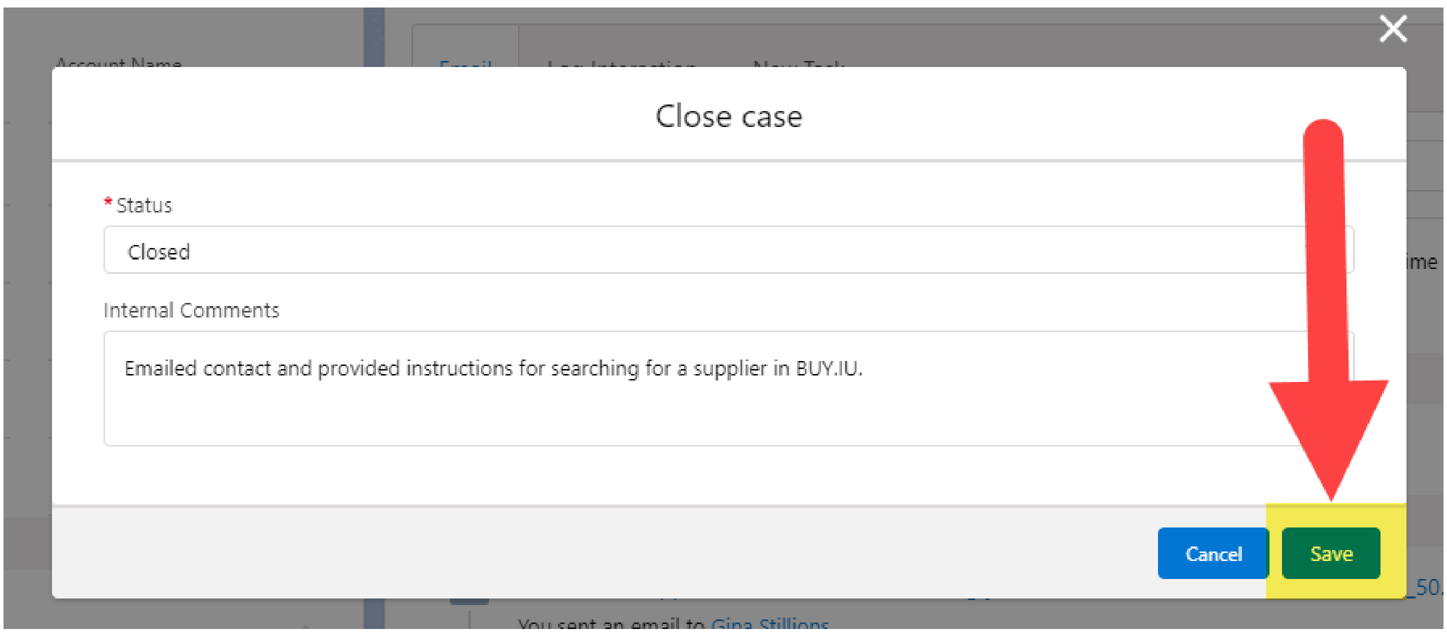


Finally, click **Close case** in the upper right-hand corner.



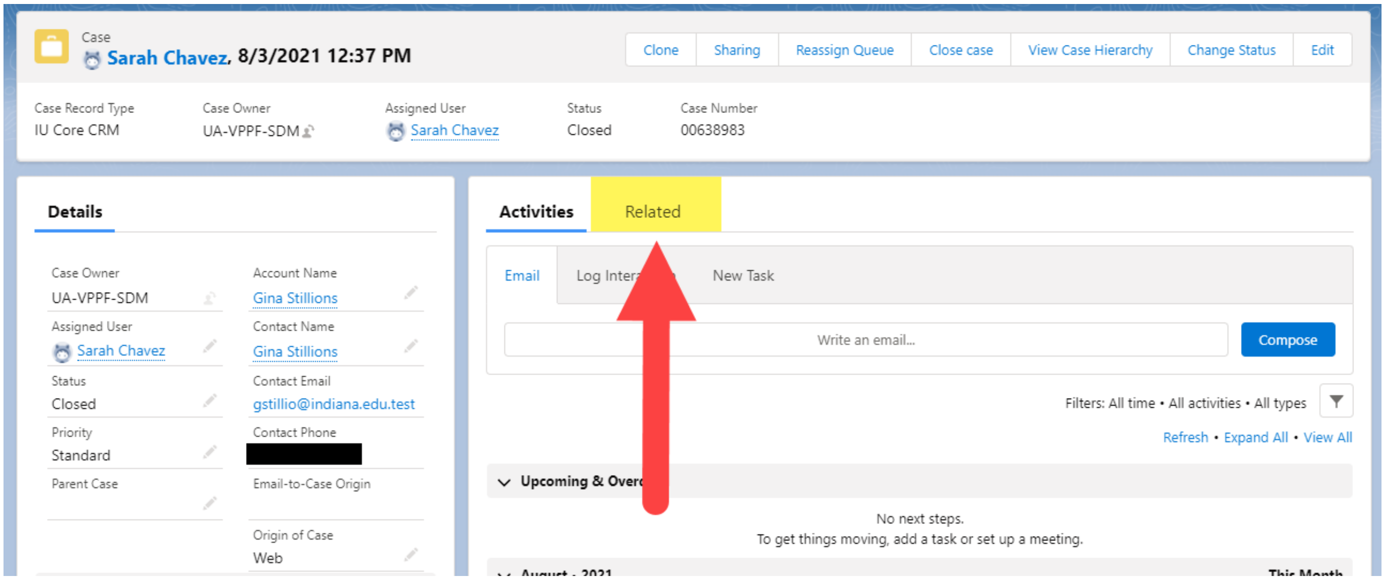
A new window opens and CRM prompts you to enter an Internal Comment explaining why the case is being closed. Internal Comments are not visible to the contact. They are only visible to other CRM users.

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



Following up on a Case

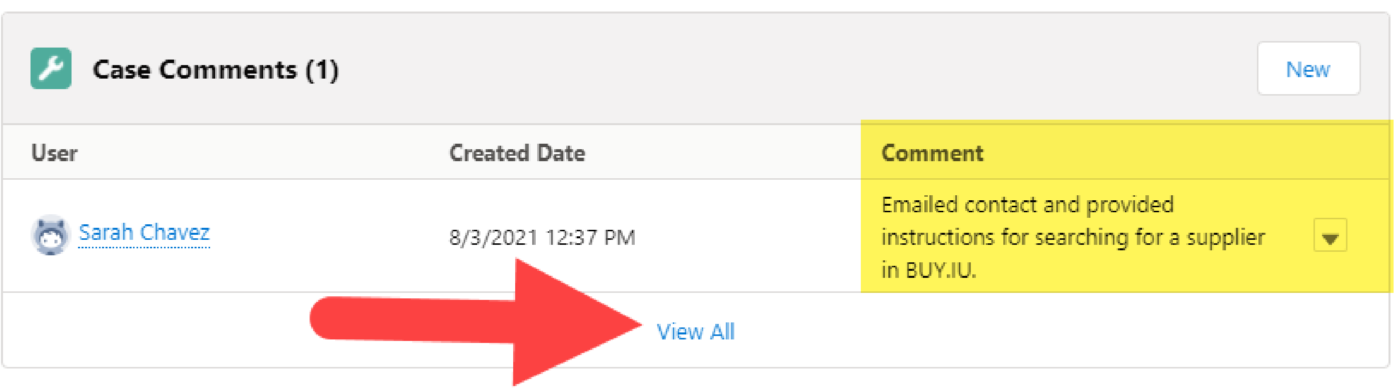
When you receive a response on a case or see that a case has been assigned to you, always review the **Related** tab first. The Related tab is in the pane on the right-hand side of the case.



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.



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.