



Using CRM



Business Process Guide

for

All CRM Agents

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What is CRM?

CRM (Customer Relationship Management) allows *users* to submit *cases*, which are requests for help. These cases get submitted to **Provider Groups**, which are groups of people who share a common set of knowledge (i.e. email administration). People in provider groups are called **CRM agents**. Agents search for, open, create, update and solve cases. This activity always involves some sort of communication with the customer. The customer is the user mentioned above.

What can I do in CRM?

There are six basic actions that a CRM agent can do in CRM:

1. Search for cases
2. Create new cases
3. Update cases
4. Communicate with customers
5. Transfer cases to other provider groups
6. Solve cases

This table shows the basic actions you can do in CRM across the top. In each column are the different methods you can use to do those actions.

Search for a case	Create a case	Update a case	Transfer a case	Email customer	Solve a case
Support	Support	Support	Support	Support	Support
Quick	Quick	Quick/Email	Quick	Email	Quick/email
360 View					
Dashboard					

As you can see, You can do all actions using the Support view. In addition, you can do many of the actions using the Quick view and even use email while not being logged into CRM.

Each of the methods listed in this table will be described in detail. You can decide which methods work best for you.

This guide contains a lot of information. We suggest that you use the table of contents and review the sections you are interested in, rather than reading the guide from cover to cover.



Accessing CRM

CRM is accessed via any web browser that is connected to the internet.

Open a web browser and go to this URL: <https://crm.oasis.asu.edu>.

Login with your ASURITE ID and Password.

Requesting access

In order to access CRM, you must first request access to a role in PeopleSoft. The role you need is **UTO Call Center Agent**. (Don't worry, the role doesn't mean you have to work in UTO or work in a call center!)

To request the role, go to this URL: <https://www.asu.edu/go/oasis/AddSecurityRequest/>

- Put in your ASURite ID and click on continue.
- Put in the ASURite ID of your supervisor.
- Type in the reason for your request: that you need access to CRM and what provider group you are to be a part of.
- Click on Add Roles
- Scroll down to find the role UTO Call Center Agent
- Click on the check box next to the role
- Click on Save and Return
- Click on Save and Submit
- Click on I agree
- Click on Return.

Next your supervisor, the data trustee and the security agent all have to approve your role. It usually takes 2 business days.



Searching for Cases in CRM

There are several different ways to search for cases in CRM. CRM cases will be created by the help desk, individuals using the online web form and by other CRM agents. You can search for these cases in three different ways:

Use the **Dashboard** to quickly and easily locate cases assigned to you and to your provider group.

Use the **360 degree view** to look at all cases that a customer has started

Use the **Support view** to powerfully search for cases that meet your specific criteria.

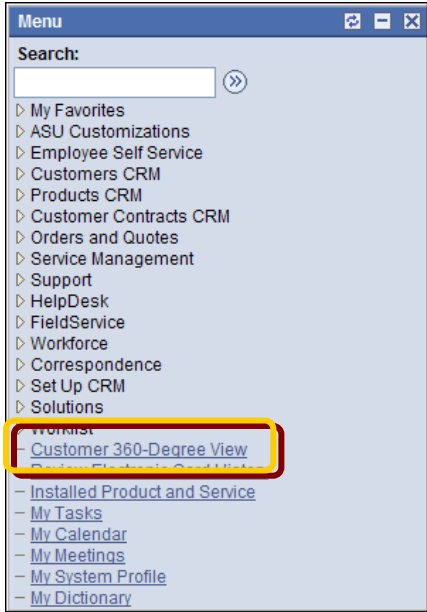
There is a search feature in the **Quick View** screen as well.

Each of these techniques will be shown in the next pages.



Search for a Case: 360 View

The 360 view is the best way to see if a customer has open case for the same problem you are working on, or a previous case that addressed the same problem.



Login to CRM at <https://crm.oasis.asu.edu> with your ASURite ID and password.

Click the **Customer 360-Degree View** link. The search field will display. Enter the information you have for the customer who has contacted you. Click on **Search**.

A screenshot of a web application form titled "Search For Customer". The form has a "Search" dropdown menu at the top. Below the dropdown is a list of input fields for customer information: ASURITE Id, Organization, First Name, Last Name, Customer ID, Phone, Email, Address, City, State, Postal, and Country. The "Search" button is highlighted with a yellow and red border. There is also a link for "Advanced Search" next to the button. At the bottom left of the form is a "Main Content" button.



Search For Customer

▼ Search

Name begins with []

First Name begins with [Test]

Last Name begins with [Test]

ASURITE Id begins with []

Customer ID begins with []

Phone = []

Email = []

Address begins with []

City = []

State = []

Postal = []

Country = []

EmplID begins with []

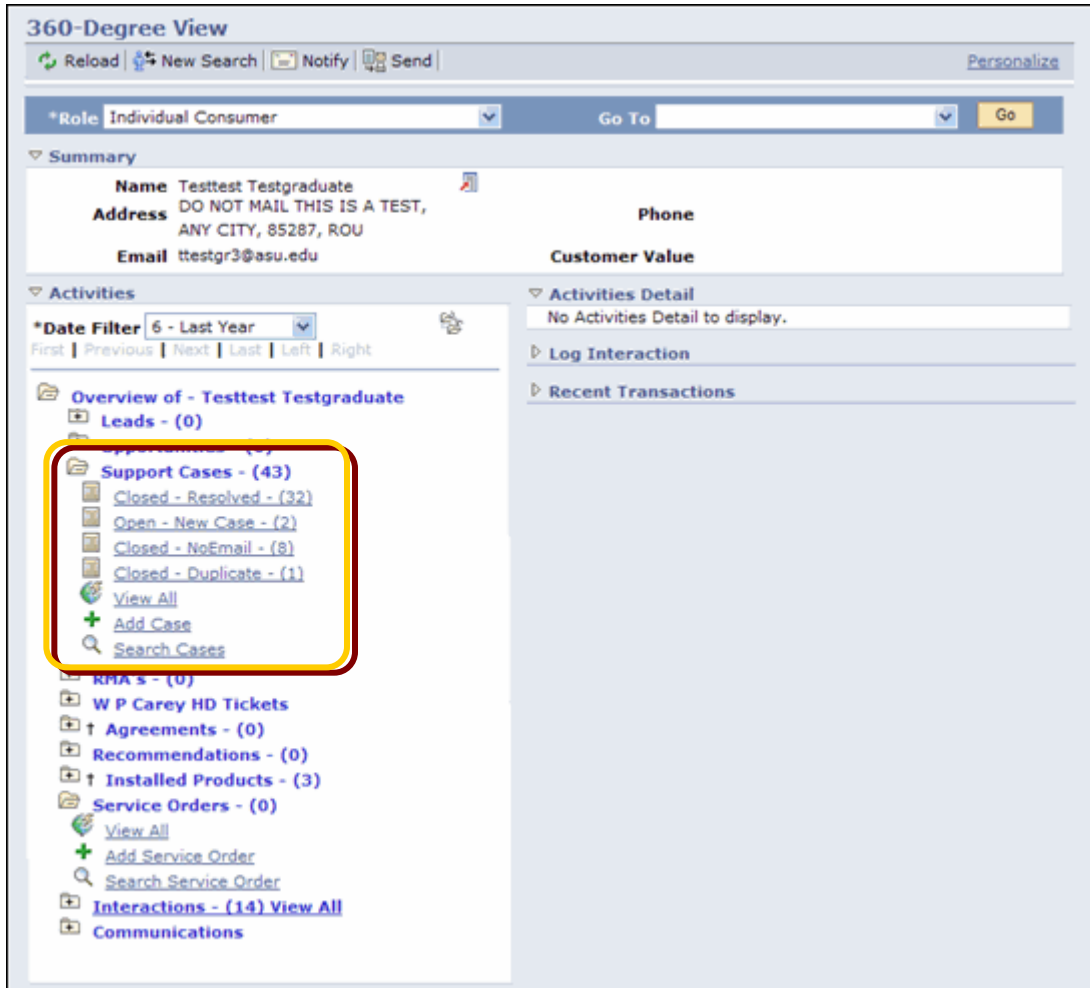
Campus ID begins with []

Search Clear Cancel

Search Results View All |

Last Name	First Name	ASURITE Id	Email	Address 1	City	Postal
TestLast	TestFirst		testaccount@mailinator.com			
Testgraduate	Testtest	ttestgr3	ttestgr3@asu.edu	DO NOT MAIL THIS IS A TEST	ANY CITY	85287
test	test	ttest2		asdf	adf	ASDF
test-qpay	test					

Select the appropriate customer from the **Search Results** by clicking their corresponding **Last** or **First Name** links.

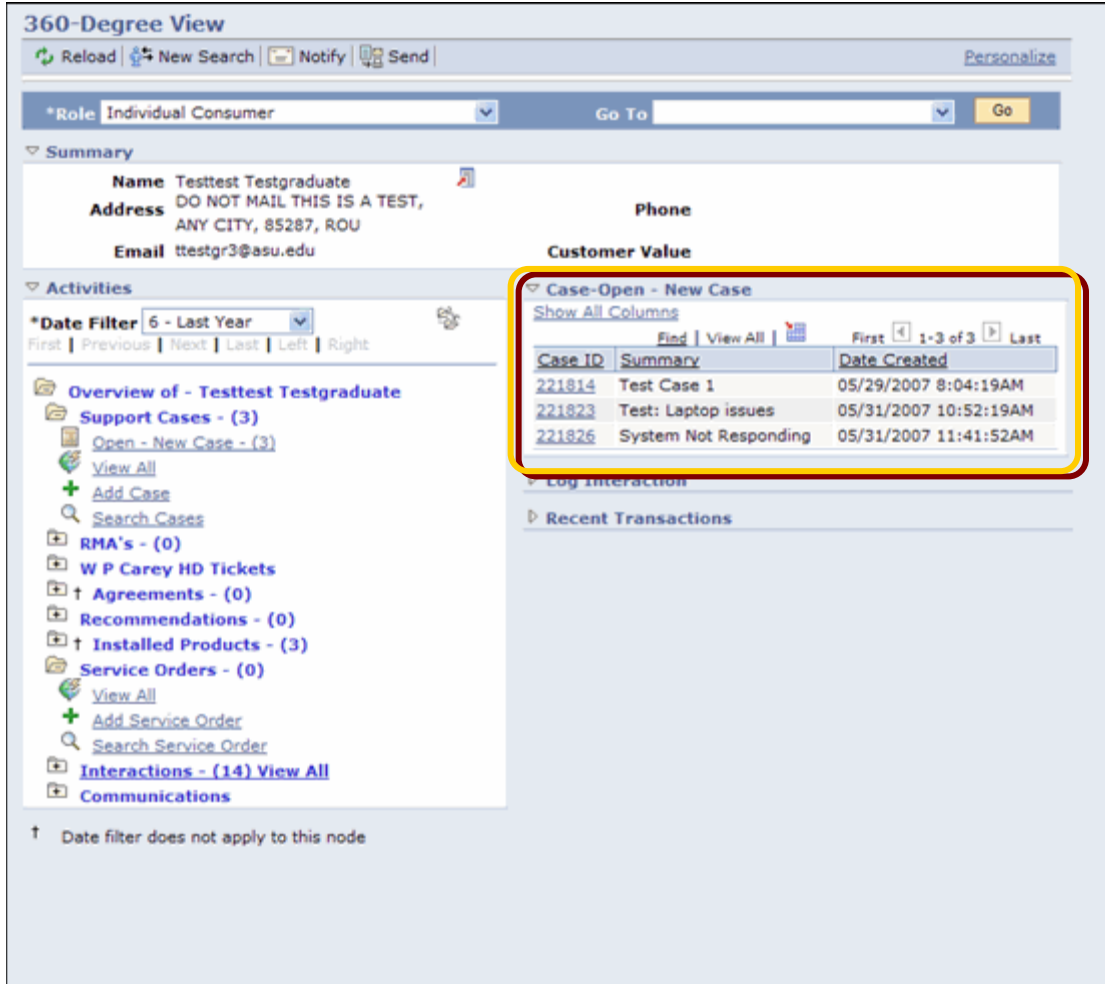


All cases concerning the customer will be displayed.

Biographical information will be displayed in the **Summary** section.

All cases will be displayed in the **Activities** section.

Click on the **Open - New Case** link to see all cases that are currently open for the customer. OR Click on the **Closed** links to see a list of cases that have been solved for the customer.



360-Degree View

Reload | New Search | Notify | Send | Personalize

*Role: Individual Consumer | Go To: | Go

Summary

Name: Testtest Testgraduate
Address: DO NOT MAIL THIS IS A TEST, ANY CITY, 85287, ROU
Email: ttestgr3@asu.edu
Phone:
Customer Value:

Activities

*Date Filter: 6 - Last Year | First | Previous | Next | Last | Left | Right

Overview of - Testtest Testgraduate

- Support Cases - (3)
 - Open - New Case - (3)
 - View All
 - Add Case
 - Search Cases
 - RMA's - (0)
 - W P Carey HD Tickets
 - Agreements - (0)
 - Recommendations - (0)
 - Installed Products - (3)
 - Service Orders - (0)
 - View All
 - Add Service Order
 - Search Service Order
 - Interactions - (14) View All
 - Communications

† Date filter does not apply to this node

Case-Open - New Case

Show All Columns | Find | View All | First | 1-3 of 3 | Last

Case ID	Summary	Date Created
221814	Test Case 1	05/29/2007 8:04:19AM
221823	Test: Laptop issues	05/31/2007 10:52:19AM
221826	System Not Responding	05/31/2007 11:41:52AM

Log Interaction

Recent Transactions

In the **Case-Open – New Case** section you can see the **Case ID**, **Summary**, and **Date Created** for the open cases.

The list of cases display on the right.

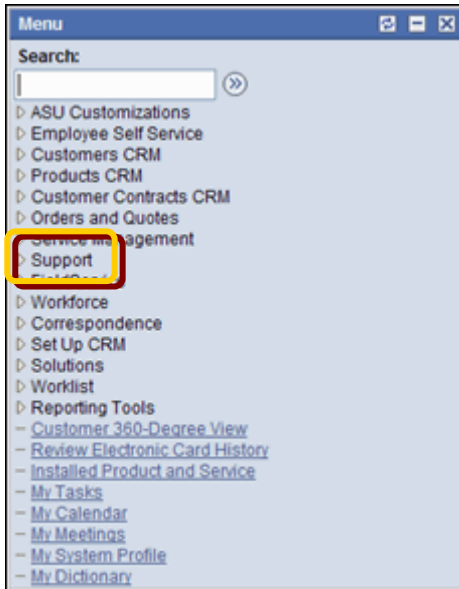
Click on the **Case ID** for the case that you want to access. The case will open in support view.

To see more about each case before opening one, you can click on the **show all columns** link.



Search for a Case: Support View

The support view is the most powerful way to view new cases. You can search in many ways, and save different search criteria to quickly retrieve different lists of cases.



Login to CRM at <https://crm.oasis.asu.edu> with your ASURite ID and password

Click the **Support** link



Click the **Search Cases** link.

The screenshot shows the 'Support Case' search interface. At the top, there is a 'Search Results' section with a message 'No search results were found.' and an 'Add Case' button. Below this is the 'Search' section, which includes a 'Use Saved Search' dropdown menu (callout 6), a 'Search' button (callout 3), and a 'Clear' button. There are also links for 'Advanced Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'. The main search area contains several criteria: 'ASURite ID' (with a 'begins with' dropdown), '*Business Unit' (with a dropdown set to 'University Tech Organiz'), 'Case', 'Customer', 'Contact' (with callouts 1 and 2), 'Case Status', 'Provider Group', 'Case Priority', and 'Assigned To'. At the bottom of the search area, there is another 'Search' button (callout 3), a 'Clear' button, and the same set of links as above (callout 4). A '5' callout points to the 'Save Search Criteria' link.

Fill in the screen with the attributes for cases that you want to see.

Notes:

- 1) You can change the *comparator* field. For example, you can set the search to find cases where the Case status is *in* a list of values.
- 2) You can type in, select from pull down lists, click on magnifying glasses or other icons to select different values.
- 3) When you have your search criteria set, click on **Search**
- 4) Click on **Advanced Search** to show many more attributes that you can search with.
- 5) If you are going to search in a certain manner repeatedly (like searching for open cases assigned to a particular person), you can save that search criteria once you set it. Click on this link *after* setting the criteria and *before* clicking on search.
- 6) Once you save the search criteria you can retrieve them from the pulldown list.

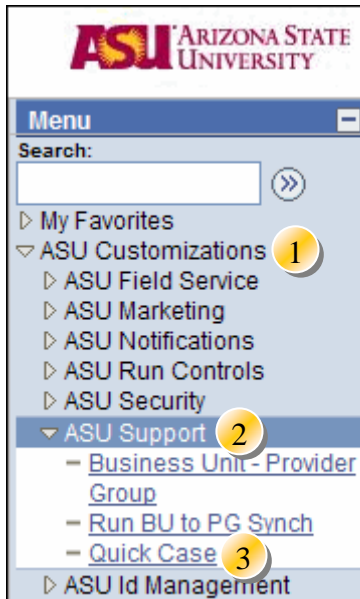


Search for a Case: Quick View

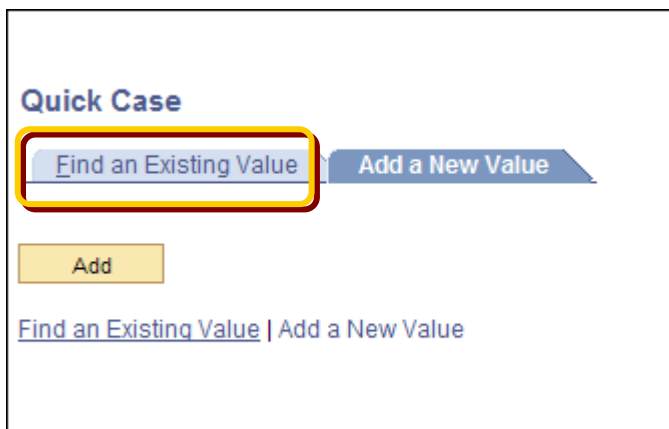
Quick view is a way to quickly *create* cases. It has a search function that you can use. It has limited functionality.

Login to CRM at <https://crm.oasis.asu.edu> with your ASURite ID and password.

Click these links: **ASU Customizations > ASU Support > Quick Case**



Click on the **Find an Existing Value** tab



Quick Case

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

Case ID:	<input style="width: 100%;" type="text" value="="/>	<input style="width: 95%;"/>	
Business Unit:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;"/>	🔍
Provider Group ID:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;"/>	🔍
Case Status:	<input style="width: 100%;" type="text" value="begins with"/>	<input style="width: 95%;"/>	🔍

🔍 Search
Clear
Basic Search
Save Search Criteria

Find an Existing Value
|
Add a New Value

- 1) If you know the case ID, you can type it in the first field and click on search. The case ID is the 6 digit number automatically assigned to the case when it is created.
- 2) You can use this search to show all cases for a particular business unit, provider group and/or case status.
- 3) Once you set your search criteria, click on *search*. A list of cases that match will display. Clicking on a case will open it in quick case view.
- 4) If you use a particular search criteria often, you can click on *Save Search Criteria* to save it. A new field will display that will let you choose that save search criteria the next time you search.

Search for a Case: Dashboard

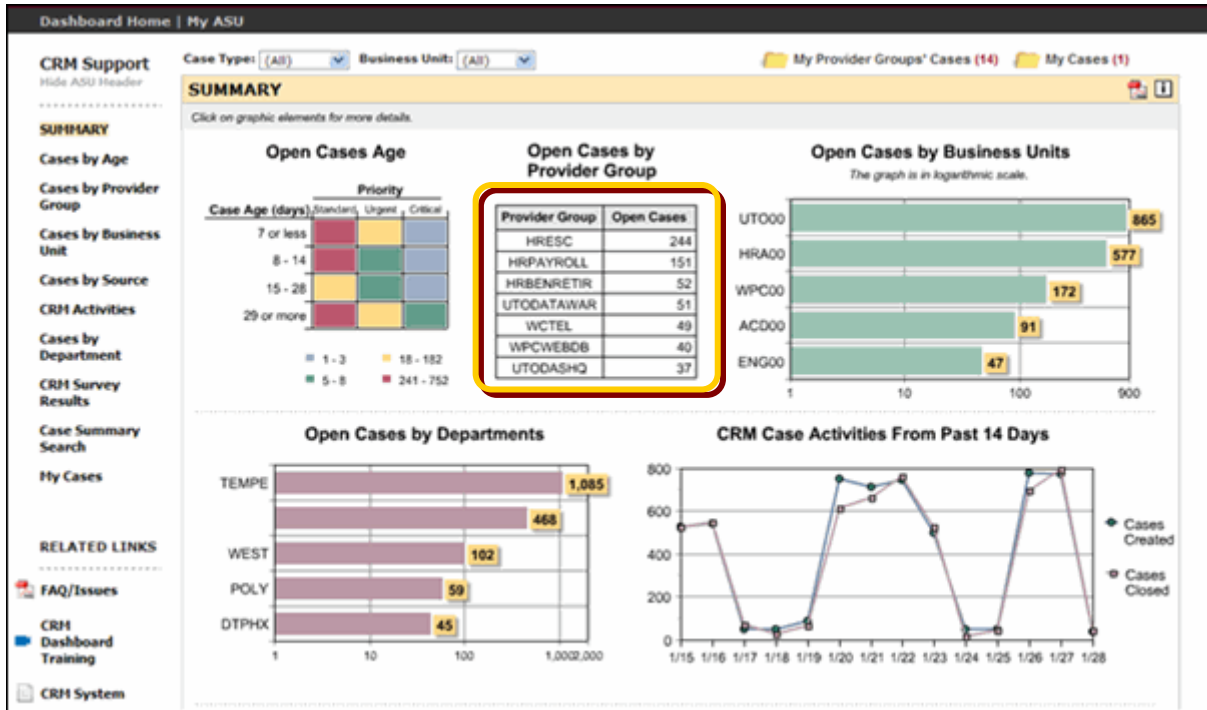
You can also search for cases using the dashboard. The dashboard is a quick way to list cases belonging to you or your provider group.



Open a web browser and go to <http://dashboard.asu.edu>

Click on the **CRM Support** link to access the CRM Dashboard..

You must request access to the dashboard. This access is separate from CRM. There is a “Request Access” link in the lower right corner of the screen.



You can click on any graph to “drill down” into the cases. Most people use the “open cases by provider group” table.

Dashboard Home | My ASU

CRM Support
Hide ASU Header

Business Unit: (All) Provider Group: Top 10 Priority: (All) Category: (A)

Status: (All) Case Type: (All) From: 8/1/2007 To: 1/28/2009

SUMMARY
Back

Cases by Age

Cases by Provider Group

Cases by Business Unit

Cases by Source

CRM Activities

Cases by Department

CRM Survey Results

Case Summary Search

My Cases 4

RELATED LINKS

FAQ/Issues

CRM Dashboard Training

Provider Groups with Most Open Cases

Provider Group ID	Provider Group	Count
HRESC	HR Employee Service Center	245
HRPAYROLL	HR Payroll	151
HRBENRETIR	HR Retirement Prog Mgmt	52
UTODATAWAR	UTO Data Warehouse	51
WCTEL	College of Teacher Education and Leadership	49
WPCWEBDB	WPC Web Database	40
UTODASHQ	UTO Corda Dashboard	37
HRBENLEAVE	HR Leaves & Disability Mgmt	33
UTOASUWEB	UTO ASU Web Dev Tier 2	32
PSHRDEV	PS HRIS Development	29

Provider Groups with Most Closed Cases

Provider Group ID	Provider Group	Count
HRESC	HR Employee Service Center	19,837
UTOHD	Help Desk	11,062
UTOSSCLAS	UTO Support Services for CLAS	4,590
UTOEMAILT2	UTO Email Tier 2 Support	4,379
UTODTSWEST	UTO Deskside Technology Support - West	4,143
UTODPCDSS	UTO DPC Deskside	3,850
UTOEMAIL	UTO Email Tier 1 Support	3,629
WPCDESK	WPC Desktop	3,549
WPCWEBDB	WPC Web Database	3,485
UTO-ATS-FC	Fulton Center Admin Tech Support	2,977

- 1) Use the navigation lists at the top to change what cases are displayed. Most often, people change the Provider group from “Top 10” to “All”.
- 2) Click on the provider group ID to see who is in the provider group.
- 3) Click on the number to display a list of the cases. In that list, click on the case ID to open it in support view.
- 4) To see your cases, click on “My Cases”.



This is what the list looks like when you click on the number of cases.

- 1) Clicking on the case ID will open the case in support view in a new window.

If you are comfortable with working in two windows, you can use the dashboard to launch the new window and then work the case in the new window. This new window will refresh with the next case that you click on in the dashboard.

Note that the dashboard refreshes every hour, so you won't see progress on cases immediately.

- 2) Clicking on *Show Columns* will display more columns, including who the cases are assigned to.
- 3) Clicking on any column heading will sort the list by that column.

Case ID	Created On	Provider Grp.	Days Open	Hours Remain to Meet SLA	Case Summary
313835	9/9/08	HCMTECH	234		ENH:Original Case was never resolved (239361)
336545	11/17/08	HCMTECH	165		PRD Issue - Unable to clear Not Saved status in PM Staging table
341348	12/2/08	HCMTECH	150		W9 for NRA's on Tax data page not working
350969	1/09	HCMTECH	113		MSS Termination Updates
352820	1/09	HCMTECH	108		Correction of ASUCA011 Report
353975	1/15/09	HCMTECH	106		Submitted Hours Adj to Payroll to zero out vacation
357127	1/23/09	HCMTECH	98		Enh/ (See Notes) Entering Employee Schedules
359198	1/28/09	HCMTECH	93		The following job code does not appear to be working with the inference table.
361808	2/2/09	HCMTECH	88		RE: File for 1/25/2009 (Service Purchase)

This graphic shows some of the columns revealed when you click on *Show Columns*. You can sort the table by clicking on any column heading. Sort in reverse order by clicking a second time.

Case ID	Created On	Business Unit	Provider Grp.	Assigned On	Prior Provider Grp.	Days Open	Priority	Case Type	Category	Status	Assigned To	Assigned Date
303575	8/13/08	WPC00	WPCWEB08		WPCTAC	168	Standard	Request	Access Management	OPWIP	Julie Kent	
319410	9/24/08	WPC00	WPCWEB08			126	Standard	Issue		OPNEM	Shloh Nelson	
339832	11/25/08	WPC00	WPCWEB08	2008-11-25		64	Standard	Issue		OPNEM	Shloh Nelson	2008-11-25
345673	12/16/08	WPC00	WPCWEB08	2008-12-16		43	Standard	Issue		OPNEM	Shloh Nelson	2008-12-16
345673	12/17/08	WPC00	WPCWEB08	2008-12-17		43	Standard	Issue		OPNEM	Shloh Nelson	2008-12-17



Creating Cases

There are many ways that cases will be created: End users can use a web form linked off of My ASU, The Help Desk will create cases, you can set up an email to automatically create cases and you can create cases as an agent.

As an agent,

When creating your own cases, there

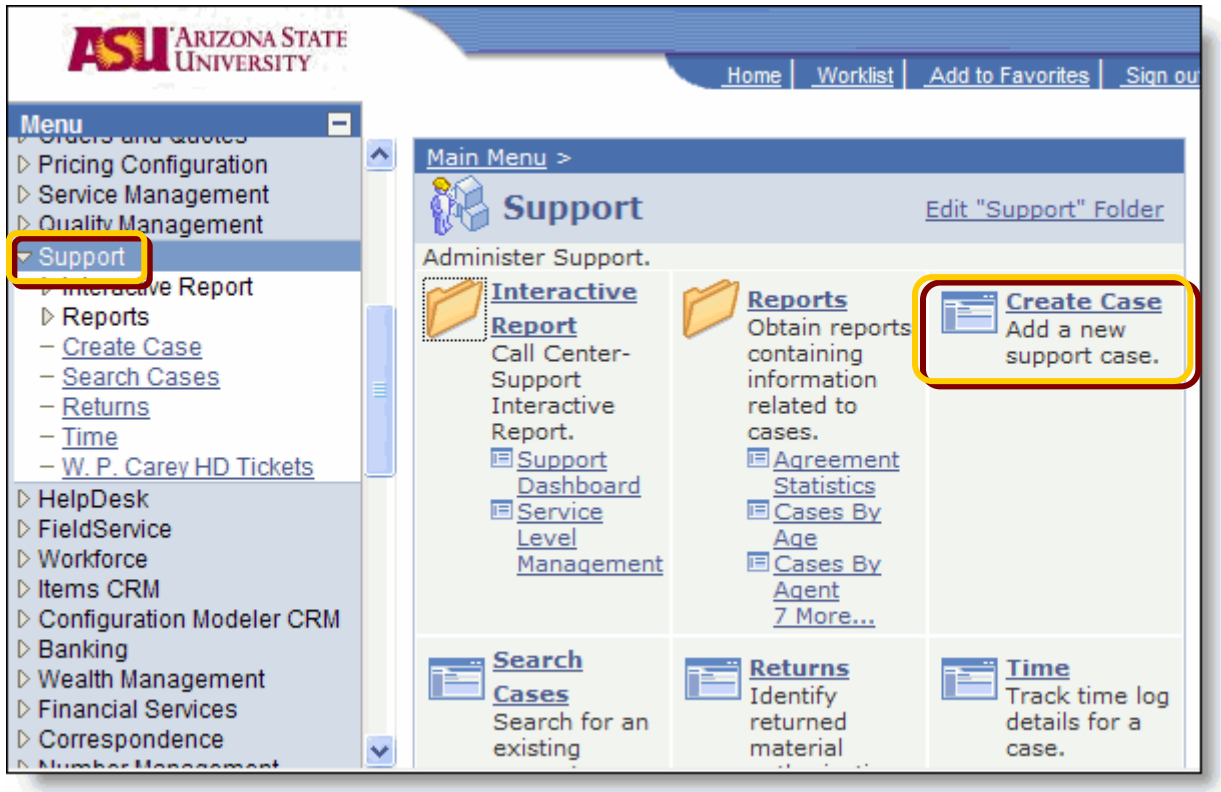


Create a Case: Support View

You have the most control over a case by using the support view. You can create a case in the support view.

Login to CRM at <https://crm.oasis.asu.edu>. Use your ASURite ID and password.

Click on **Support** then on **Create Case**



This is a screen shot of the support view for creating a case. Look for notes that correspond to the numbers on the next page.

The screenshot shows the 'Case' creation interface. At the top, there are navigation links like 'New Window', 'Help', and 'Customize Page'. Below that, a status bar shows '05/02/2009 1:35:00PM MST' and 'My Time Zone'. A toolbar contains buttons for 'Save', 'Print Case', '360-Degree View', 'Notify', 'Time Entry', 'Set Reminder', and 'Personalize'. The main area is divided into 'Customer Information' and 'Case Information' panels. The 'Customer Information' panel includes fields for 'Company', 'First Name', 'Last Name', and 'SIN', with a 'Search' button (1) and an 'Advanced Search' link. The 'Problem' section has a '*Summary' field (2) and a 'Description' field. The 'Case Information' panel has a 'Main' tab and 'Morg' sub-tab, with checkboxes for 'Secured Case' and 'Anonymous Caller'. It features dropdown menus for 'Business Unit' (3), 'Quick Code' (4), 'Case Type' (5), and 'Status' (6). There are also checkboxes for 'Resolved by First Contact' and 'On Call Schedule'. Other fields include 'Provider Group', 'Assigned To' (7), 'Case Owner', 'Description', 'Problem Type', 'Serial Number', 'Asset Tag' (8), 'Installed', 'IP Address', 'MAC Address', 'Category', 'Specialty Type' (9), 'Detail', 'Priority', 'Impact' (10), 'Severity', and 'Source'. At the bottom, there are buttons for 'Save Case' (11), 'Find Solutions', and 'Escalate Case'.

- 1) Enter the first and last name of the customer into the **Customer Information** fields and click **Search**. A list of possible choices will appear. Click on the person's name
- 2) Enter a **Summary** of the case and provide any and all details in the **Description** field.
NOTE: There are spell checkers next to each text field.

Enter as much additional information as you know about the case using the drop down menus in the **Case Information** panel.



- 3) Your business unit should display by default. A Business Unit is a collection of provider groups. Some examples are: HR, UTO, WP Carey, Academics.
- 4) If your provider group has set them up, you can use **Quick Codes** to fill in the rest of the fields. Select the proper quick code from the list for the case you are working on.
- 5) Select the **Case Type** that matches your case.
 - a. **Issues** are time-tracked by the software. Reminder emails are sent for cases that are open past the terms of a support level agreement.
 - b. **Questions** are not time-tracked. They are for cases where people have asked questions only (no other work is required)
 - c. **Request** are not time-tracked, they are for longer projects.
- 6) The **Status** defaults to *Open- New Case*. There are many options. Check with your provider group for which statuses are to be used in your area.
- 7) The **Provider Group** and **Assigned To** fields default to the provider group and user that opened the case. You can change them. In order to assign the case to a specific person, you must be a member of the provider group that you have chosen for the case. The **Case Owner** is someone that will see the case through to it's conclusion. This is useful if a case has to route through several people to be solved.
- 8) The **Problem type, asset tag, serial number, IP address and MAC address** are useful for cases that involve fixing people's computers.
- 9) In order to easily report trends about your cases, it is *strongly recommended* that you select a **category, specialty type and detail** for each case. The category list is not changeable, but your provider group owner can request unique specialty types and details for a category. Note that these would be available to all provider groups.
- 10) There are three **priorities**. If the case type is "issue", the system will send notes to the provider group or the assigned agent as follows: Standard priority – 7 days old, Urgent priority – 2 days old, Critical case – 1 day old. You can also pick the **impact, severity and source** as defined by your provider group.

At this point, the case is ready to save. Click the **Save Case** button to save the case

NOTE: It will automatically be assigned a new case number/ID.

Click the **Summary** tab to see a full summary of the case you have just saved.

NOTE: The initial save of this case will:

1. Assign the case a number/ID
2. Send an Automated Open Case Receipt to the customer, and
3. Send an Auto-Notification to the assigned Provider Group.

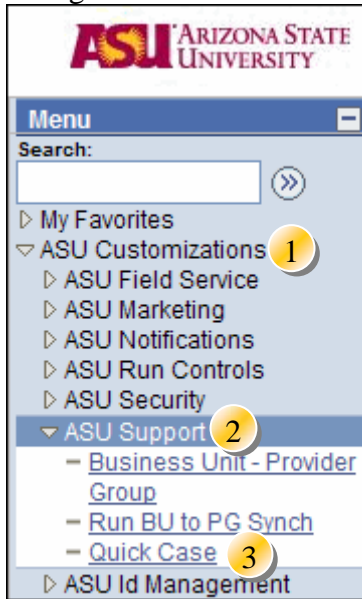


Create a Case: Quick Case View

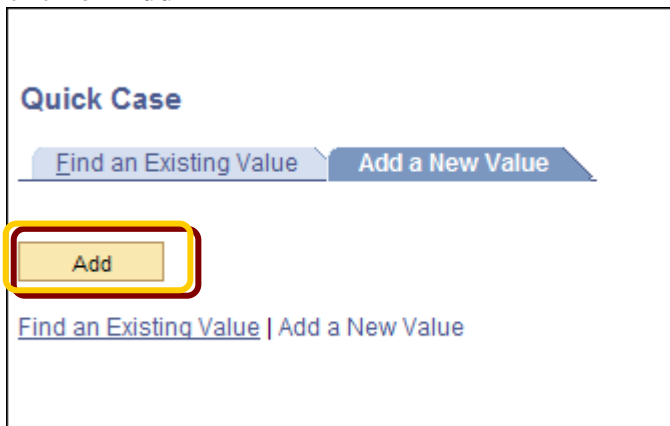
The support view gives you the most control over your case, but the creation takes a few seconds of processing (10-30 seconds). There is a quick way to create a new case called Quick Case.

Log in to CRM (<https://crm.oasis.asu.edu>)

Navigation: **ASU Customization >ASU Support > Quick Case**



click on **Add**





This is the quick case screen. This screen will quickly create a case for you. It batches the email notification together and sends them in 5 minute intervals. This allows the case creation to happen very quickly. The time between clicking the Save button and case creations is usually less than 2 seconds.

The screenshot shows the 'Quick Case' form with the following fields and callouts:

- 1: *Case Status dropdown menu (set to 'Open - New Case')
- 2: *Customer ASURite ID search field
- 3: *Provider Group ID search field
- 4: Case Type dropdown menu
- 5: Category dropdown menu
- 6: *Problem Summary text field
- 7: Save button

Other visible fields include: Customer Name, Contact Details, Business Unit, Assigned To, Case Priority, *Source (Direct Call), Specialty Type, and Detail.

- 1) Choose the case status.
NOTE: A case status of “Open – no email” will not send an email to the customer when the case is created.
- 2) Enter the **ASURite ID** of the customer. (most people find that in the outlook properties for the customer). When you tab out of the ASURITE ID field, the customer name will display and the contact details will be filled in. If the customer wants to be contacted via a different phone or email, you can change it in the contact details field. Changes in this field effect only this case.
- 3) Enter the **Provider Group ID**. This is typically at 4-10 digit ID for your provider group. If you don’t know the ID of the group, click on the magnifying glass to select from a list.

You can assign the case to someone in the provider group by clicking on the magnifying glass next to the **Assigned To** field. In order to assign the case to a specific person, you must be a member of the provider group that you have chosen for the case.
- 4) Select the **Case Type** that matches your case.



- a. **Issues** are time-tracked by the software. Reminder emails are sent for cases that are open past the terms of a support level agreement.
- b. **Questions** are not time-tracked. They are for cases where people have asked questions only (no other work is required)
- c. **Request** are not time-tracked, they are for longer projects.

There are three **Case Priorities**. If the case type is “issue”, the system will send notes to the provider group or the assigned agent as follows:

- a. Standard priority – 7 days old,
- b. Urgent priority – 2 days old,
- c. Critical case – 1 day old.

If your provider group tracks this date, select the **Source** for the case from the list.

- 5) In order to easily report trends about your cases, it is recommended that you select a **category, specialty type** and **detail** for each case. The category list is not changeable, but your provider group owner can request unique specialty types and details for a category. Note that these would be available to all provider groups.
- 6) Type in a summary of the case in the **Summary** field. Supply all available details in the **details** field. Check with your provider group for any standards in filling in these fields.

At this point, the case is ready to save. Click the **Save Case** button to save the case

NOTE: It will automatically be assigned a new case number/ID.

NOTE: The initial save of this case will:

1. Assign the case a number/ID
2. Batch process two email messages:
 - a. an Automated Open Case Receipt to the customer, and
 - b. an Auto-Notification to the assigned Provider Group.

The batches run in 5-10 minute intervals, so the email will be only slightly delayed. Detaching the email notification from the case creation was the primary way that the time to create a case was reduced.



Once you click on Save, the screen will change.

Quick Case

Case ID 395987

*Case Status Open - New Case

*Customer ASURite ID pstoll

Customer Name Paul Stoll

Contact Details 480/415-4562

*Provider Group ID UTOBLKBRD UTO Blackboard Business Unit UTO00

Assigned To

Case Type Issue Case Priority Standard *Source Direct Call

Category Training Specialty Type BlackBoard Detail

*Problem Summary Type summary here

Problem Description Type description here

Save Add

NOTE: Your case ID will show in the upper left corner of the screen.

Notice the links in the upper right corner of the screen. Clicking on either email note will start your email system and create an email that, when sent will either add a note to the case or solve the case. Details about both of these processes are found in later sections of this document.

Clicking on the **Case Summary** button will show you the case in support view.



Update a Case

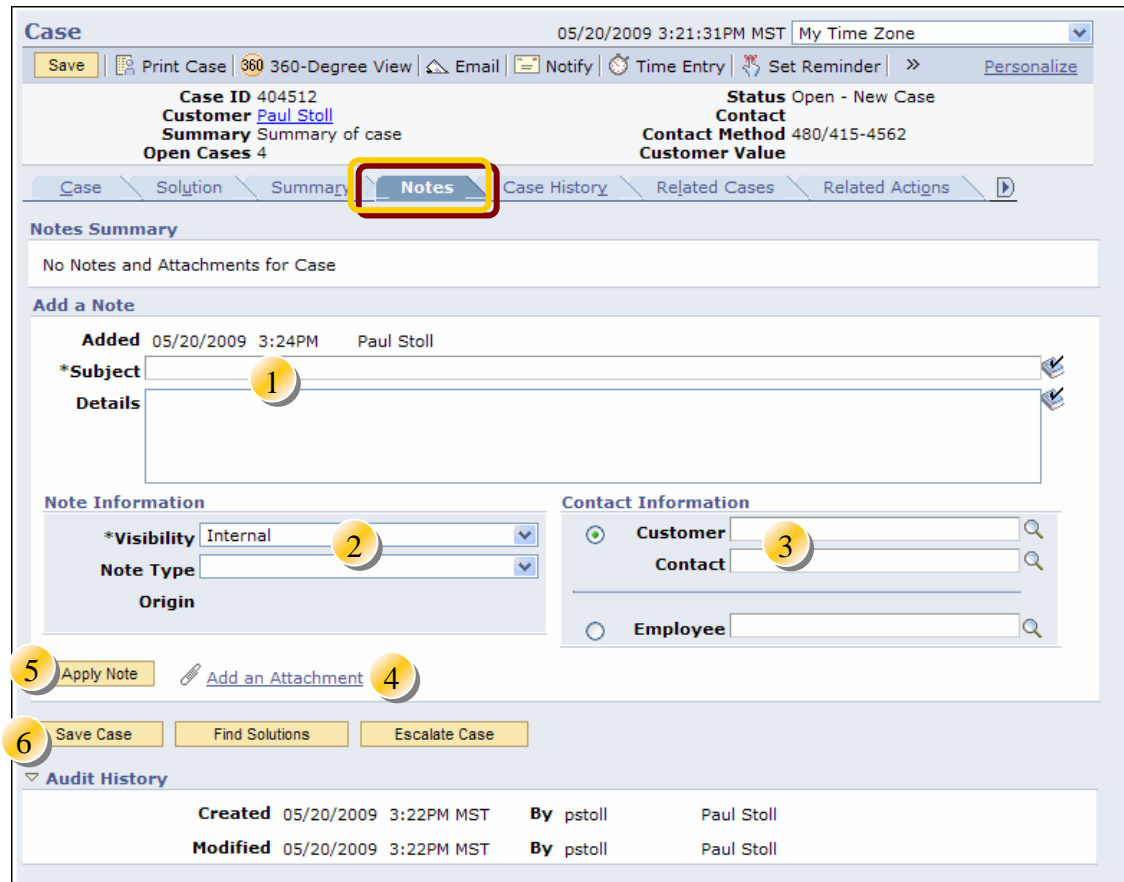
Once a case is started, you can update the case with notes and/or email the customer from within the case.

There are two ways to add notes to a case, one using the support view and one via email. The quick case view has a link to the email address as well.

Update a Case Using the Support View

Many provider groups want their agents to add notes for any significant action on a case. A note could consist of phone conversations, emails, and updates.

Navigate to the case in support view. Once there, click on the **Notes** tab.



1. When adding a note to a case, the **Subject** is required. The subject and description will show on the summary and notes pages when viewing all the notes for a case.
2. You can set the **visibility** to **Internal** or **All**. Internal visibility means only your provider group can see the note. You can also set the **Note Type**, for reporting reasons.
3. This is a little-used space to add additional customers, contacts or employees.
4. If you have external files to add, you can use the **Add an Attachment** link. You will then navigate to your file and click Upload. To see other attachments that have been added to a case, you must open each note.
5. Click on **Apply Note**. The note will be visible in both the *Notes* and *Summary* tab.
6. Click on **Save Case** to save your changes.



You will see the note that was just created in the **Notes Summary** area.

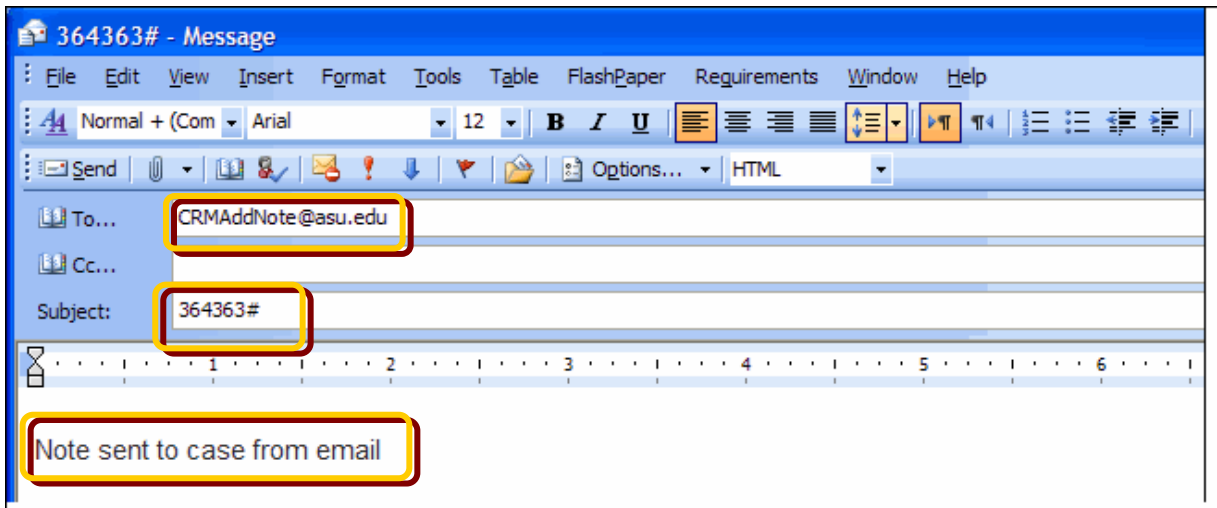
NOTE: Once the case is saved, notes can no longer be edited.

Update a Case Using Email

You can add a note to a case using email. You don't have to have CRM running. Open a new email message and address it to CRMAddNote@ASU.edu. In the subject line, put the 6-digit number followed by the pound sign (#). Whatever you put in the text of the email will be put in the description of the note.

Important note: In order for this to work, the subject must be only the case ID and the pound sign and no other characters.

You can copy yourself, other crm agents or the customers in the message as well.



This is what the note looks like in the support view of the case.

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>	Note added by email from (Internal Only) Paul.Stoll@asu.edu: Note sent to case from email Paul Stoll University Technology Office Arizona State University Phone 480-415-4562		Sched and Run CM CC Processes	05/20/09 4:26PM MST
<input type="checkbox"/>	demo note 2 (Internal Only) description of note		1 Paul Stoll	05/20/09 3:41PM MST
<input type="checkbox"/>	summary of note (Internal Only) details of note		1 Paul Stoll	05/20/09 3:37PM MST

Notice that the "Added by" field shows a process instead of a person's ID. Also note that the person who sent the note is listed in the body of the note itself. The first characters in the description are the person who sent the note. The next characters are what was typed in the note. This is followed by the contact information for the person.

The Summary (the hyper link) will always read "Note added by email from".

Email the Customer: Support View

Case 05/26/2009 4:31:42PM MST My Time Zone

Save | Print Case | 360 360-Degree View | **Email** | Notify | Time Entry | Set Reminder | Personalize

Case ID 404512 **Status** Open - New Case
Customer Paul Stoll **Contact**
Summary Summary of case **Contact Method** 480/415-4562
Open Cases 5 **Customer Value**

Case Solution **Summary** Notes Case History Related Cases Related Actions

Problem

***Summary**
Summary of case

Description
details for case

Case Information

Main More

***Business Unit** University Tech Organizations

Quick Code

***Status** Open - New Case

On Call Schedule

Provider Group UTO Blackboard

Assigned To Paul Stoll

Case Owner

IP Address

MAC Address

Category Training

Specialty Type BlackBoard

Detail

Priority Standard

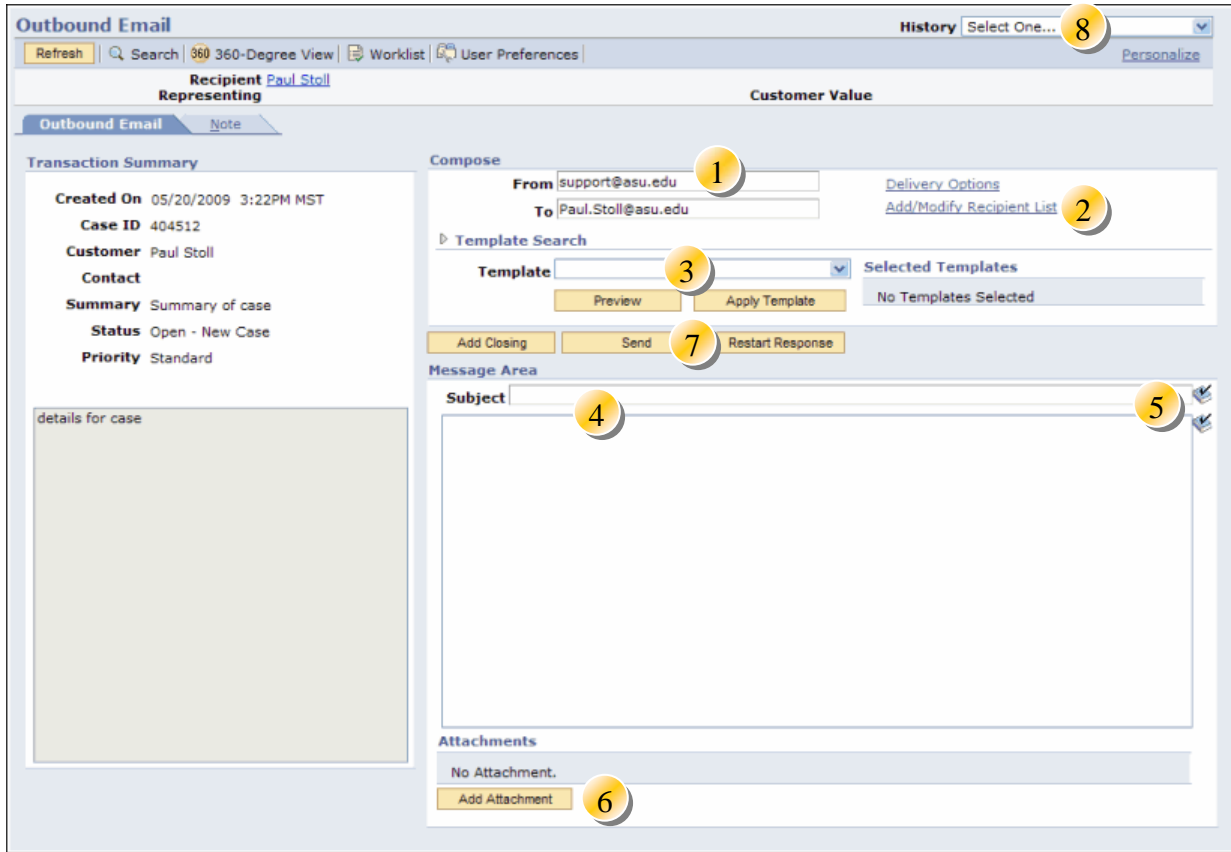
Severity

Notes Summary Customize | Find | View All | First 1-3 of 3 Last

Select	Description	Attachment(s)	Type	Date Added	Formatted Name
<input type="checkbox"/>	Note added by email from (Internal Only) Paul.Stoll@asu.edu: Note sent to case from email Paul Stoll University Technology Office Arizona State University Phone 480-415-4562		Comment	05/20/2009 4:26PM MST	Sched and Run CM CC Processes
<input type="checkbox"/>	demo note 2 (Internal Only) description of note		1 Customer Call	05/20/2009 3:41PM MST	Paul Stoll
<input type="checkbox"/>	summary of note details of note		1 Comment	05/20/2009 3:37PM MST	Paul Stoll

Email | View | Add Note

NOTE: There are two ways to send an email to the customer from inside of the case. If you want to include text that you have entered as a note, check the box next to the note, and click on the email button in the Notes area. If you want to send a email separate from any note, use the email button at the top of the page.



1. The default “From” address is Support@asu.edu. You can change that to your address or the address of your group.
2. You can add or modify the recipient list. You can copy and blind-copy people from this link. (see more about this on the next page)
3. There are many templates already available. Your provider group can ask for specific ones by creating a CRM case to the UTOCCFUN provider group. To apply a template, pull down the list, click on the template you desire and then click on **Apply Template**.
4. You can type in a Subject and text message for your email. If you plan on applying a template, do that first. If you have arrived here from a case note, the text of the note will be in the larger text box.
5. Spell check your subject and text using these icons.
6. You can add attachments to your message via the **Add Attachment** button.
7. When all is set as you wish, click on **Send** to send the message
8. To return to your case, select **Case** from the **History** field.



If you click on the **Add/Modify Recipients** link (step 2 on the previous page) you see this:

E-mail Workspace

Look Up Recipient

Enter as much information as you know about the person and click Search.

Unknown Recipient

First Name

Last Name

Email Address

1

Search Results

<u>Primary To</u>	<u>To</u>	<u>CC</u>	<u>BCC</u>	<u>Recipient</u>	<u>Email Address</u>	<u>ID</u>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Matthew Robinson	mrobinson127@yahoo.com	1077665
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Matthew Robinson	tqqtles@email.arizona.edu	1448639
<input checked="" type="checkbox"/> 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Matthew Robinson	Matt.Robinson@asu.edu	1171628 3
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Matthew Robinson	ridicco_laca@cox.net	1531242

4

Recipient List

Primary To Paul Stoll

To

CC

BCC 5

6 [Cancel and Return to Outbound E-mail](#)

1. Type in the first and last name (or email address) of the person you want to add to the email. Then click on **Search**. A list of possible matches will display.
2. You can select to have the person be copied (CC), Blind Copied (BCC), added to the “to” address line, or be the primary recipient using these check boxes.
3. This ID is the person’s CRM ID – it has nothing to do with other IDs for the person.
4. Click on **Add to Recipient List** to move the name from the list to the address fields below.
5. You can also type in the emails directly.
6. When done, click on **OK**.

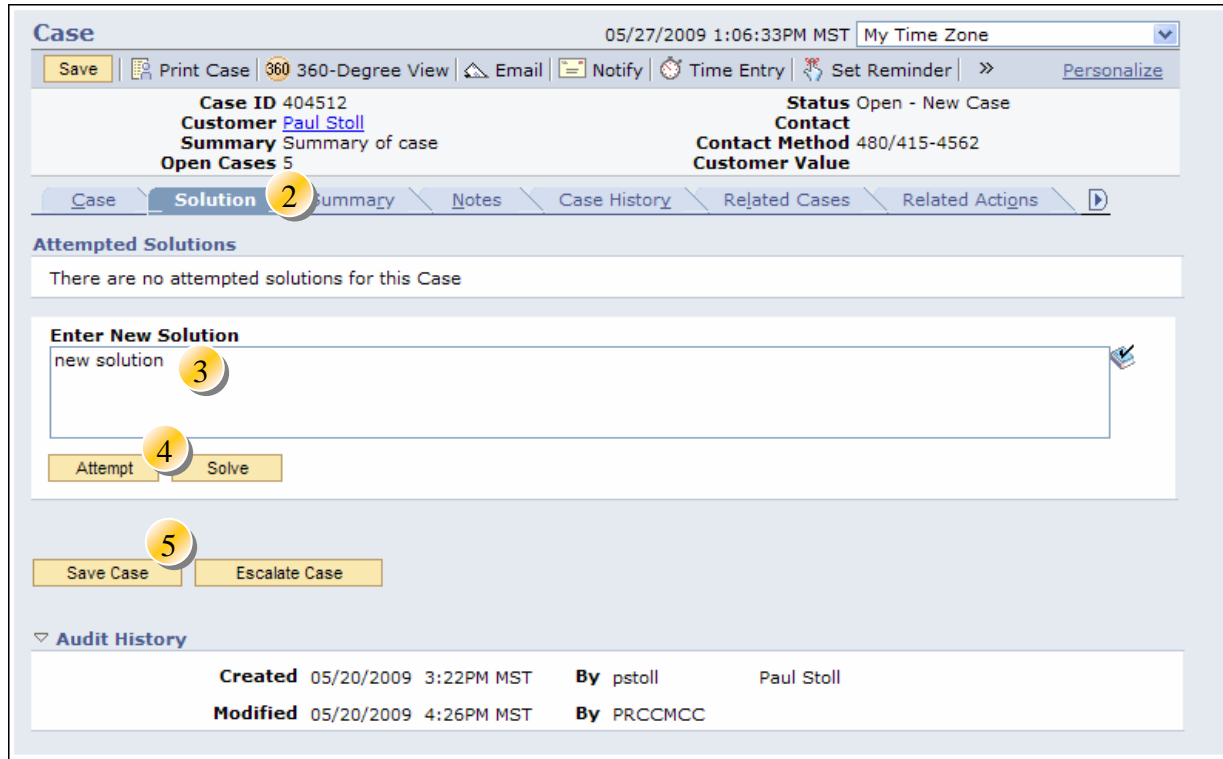


Solving Cases

To close a case, you solve it. There is a “solutions” tab in the support view. You can also close a case using email. The quick case view has a link to the email address.

Solve a Case: Support View

When you are ready to close a case, you “solve” it. Solving a case will change the status to one of several “closed” statuses. It will send an email to the customer and to you as the current agent working on the class.



Case 05/27/2009 1:06:33PM MST My Time Zone

Save | Print Case | 360 360-Degree View | Email | Notify | Time Entry | Set Reminder | Personalize

Case ID 404512 **Status** Open - New Case
Customer Paul Stoll **Contact**
Summary Summary of case **Contact Method** 480/415-4562
Open Cases 5 **Customer Value**

Case **Solution** 2 Summary Notes Case History Related Cases Related Actions

Attempted Solutions

There are no attempted solutions for this Case

Enter New Solution

new solution 3

Attempt 4 Solve

Save Case 5 Escalate Case

Audit History

Created	05/20/2009 3:22PM MST	By pstoll	Paul Stoll
Modified	05/20/2009 4:26PM MST	By PRCCMCC	

1. Navigate to the case that you want to close using the “support” view. CRM is located at <https://crm.oasis.asu.edu>. Login with your ASURITE ID and password.

Navigation: Support > Search Cases.

2. Once you are in your case. Click on the **Solutions** tab.
3. Type in the details about what fixed the case for the customer. Remember that the customer will get an automatic notification with this text included.
4. Click on either **Attempt** or **Solve**. Different statuses are assigned depending on which you pick. See the next page for more details.
5. Click on **Save Case** to save your changes.

Case 05/27/2009 1:06:33PM MST My Time Zone

Case ID 404512 **Status** Open - New Case
Customer Paul Stoll **Contact**
Summary Summary of case **Contact Method** 480/415-4562
Open Cases 5 **Customer Value**

[Case](#) / [Solution](#) / [Summary](#) / [Notes](#) / [Case History](#) / [Related Cases](#) / [Related Actions](#)

Solutions Considered for this Case [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Select	ID	Description	Date Modified	Added By	*Status
<input type="checkbox"/>	481145	new solution new solution	05/27/2009 1:08:06PM MST	Stoll, Paul Robert	In Consideration

Enter New Solution

Audit History

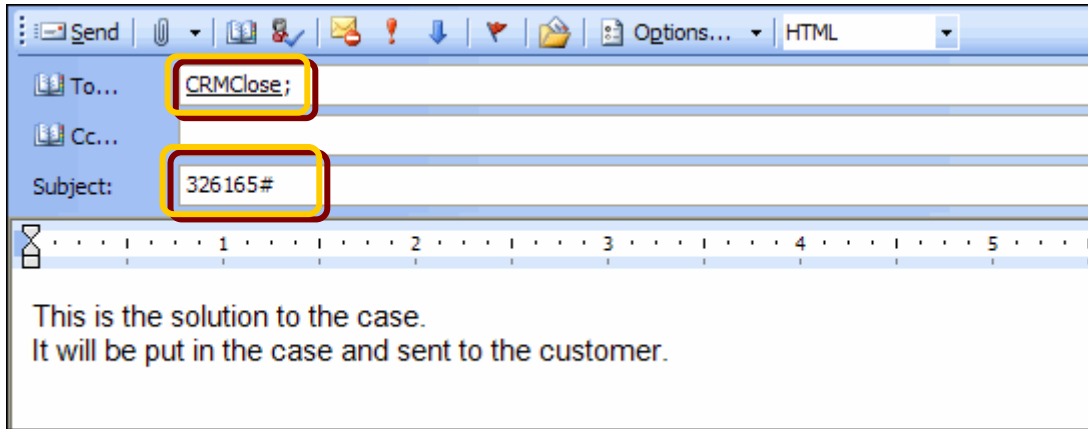
Created	05/20/2009 3:22PM MST	By pstoll	Paul Stoll
Modified	05/20/2009 4:26PM MST	By PRCCMCC	

NOTE: If you choose “attempt” the status will default to “In Consideration”. You can change the status if you prefer. If you choose “Solve”, the status will be “Successful Resolution”. You can change the status until you click on the Save button. If you put in a status of successful resolution, that status will become uneditable.



Solve a Case: Using Email

You can close a case without having CRM running! If you send an email to the address CRMClose@asu.edu and include **ONLY** the case ID followed by the pound sign. CRM will close the case for you.

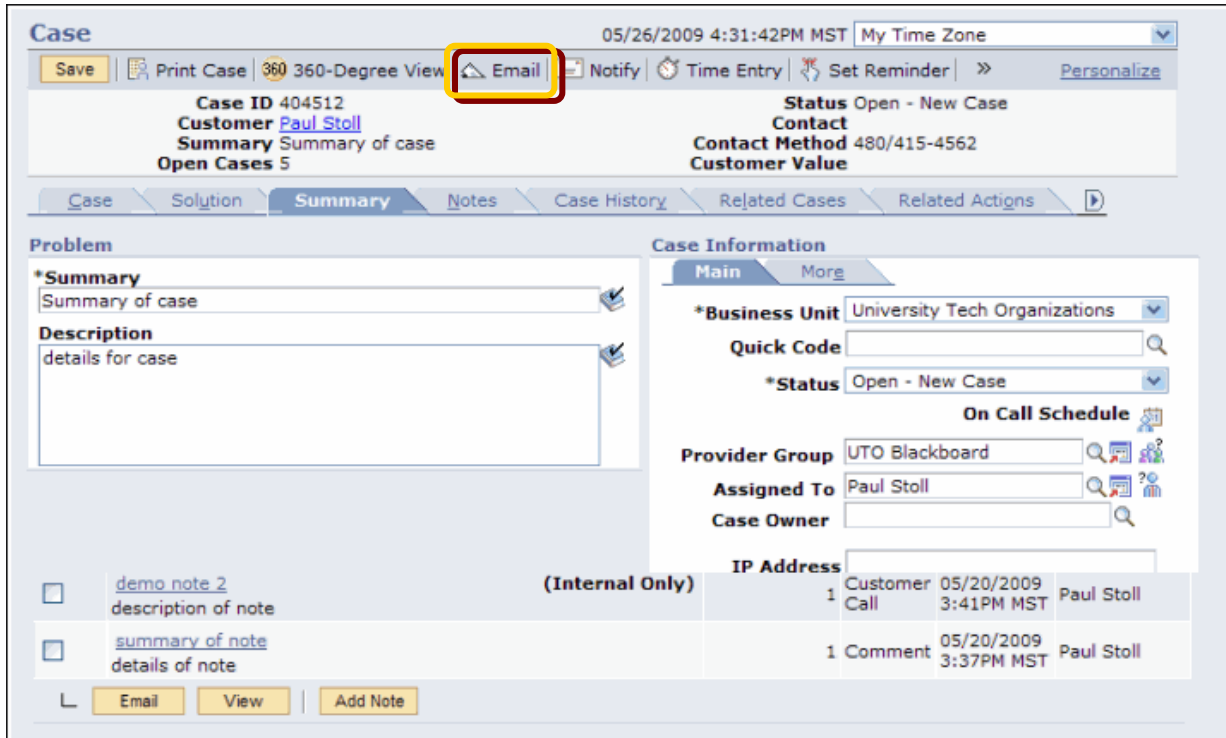


Some Notes: You can't "attempt" a solution using email. The case will be closed with a status of "Closed – Resolved". What you type in the body will be added to the case (and viewable via the Support view).

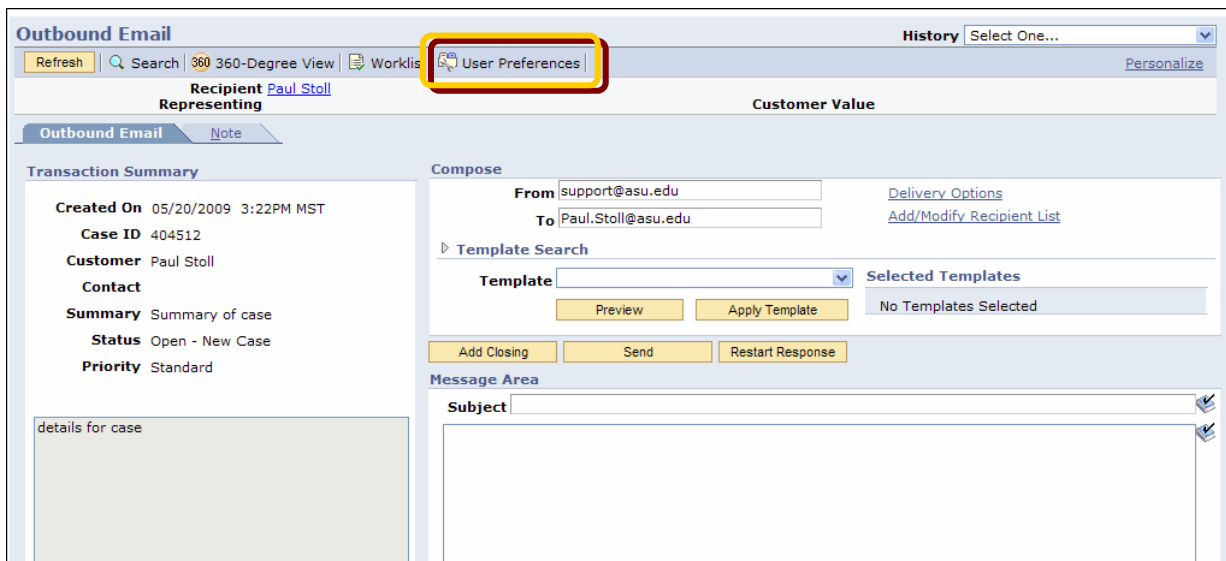
There is a link to this email in the Quick Case screen. By clicking on it, you will start an email message to CRMClose@asu.edu with the correct info in the subject line.

Removing “Add a Note” after Sent Email

CRM defaults to asking you if you want to “add a note” each time you send an email. It is possible to turn that function off. If you don’t want CRM to ask you about adding a note to the case each time you send an email from inside CRM, follow these steps:



When you are viewing a case using the support view, click on the **email** button.



Click on the **User Preferences** button.



Email Workspace User Preferences

Use this page to customize the email workspace default behavior

Message Action

***Response** Do not include the original message when replying
 Include the original message in the greeting when replying
 Include the original message in the closing when replying

***Note Entry Warning** Prompt for note entry after outbound email has been sent or submitted

Uncheck the box for “Prompt for note entry after outbound email has been sent or submitted”.
Click **OK**.

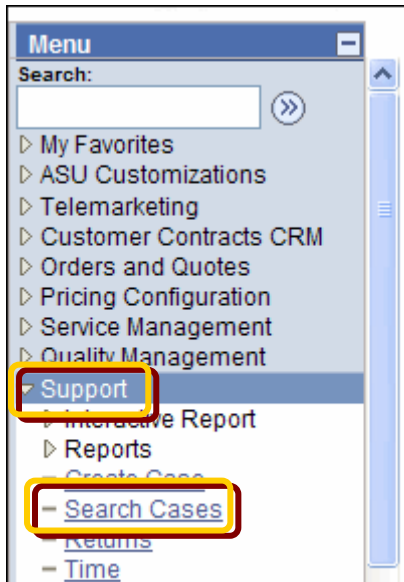


Saving a Search for Later Use: Support View

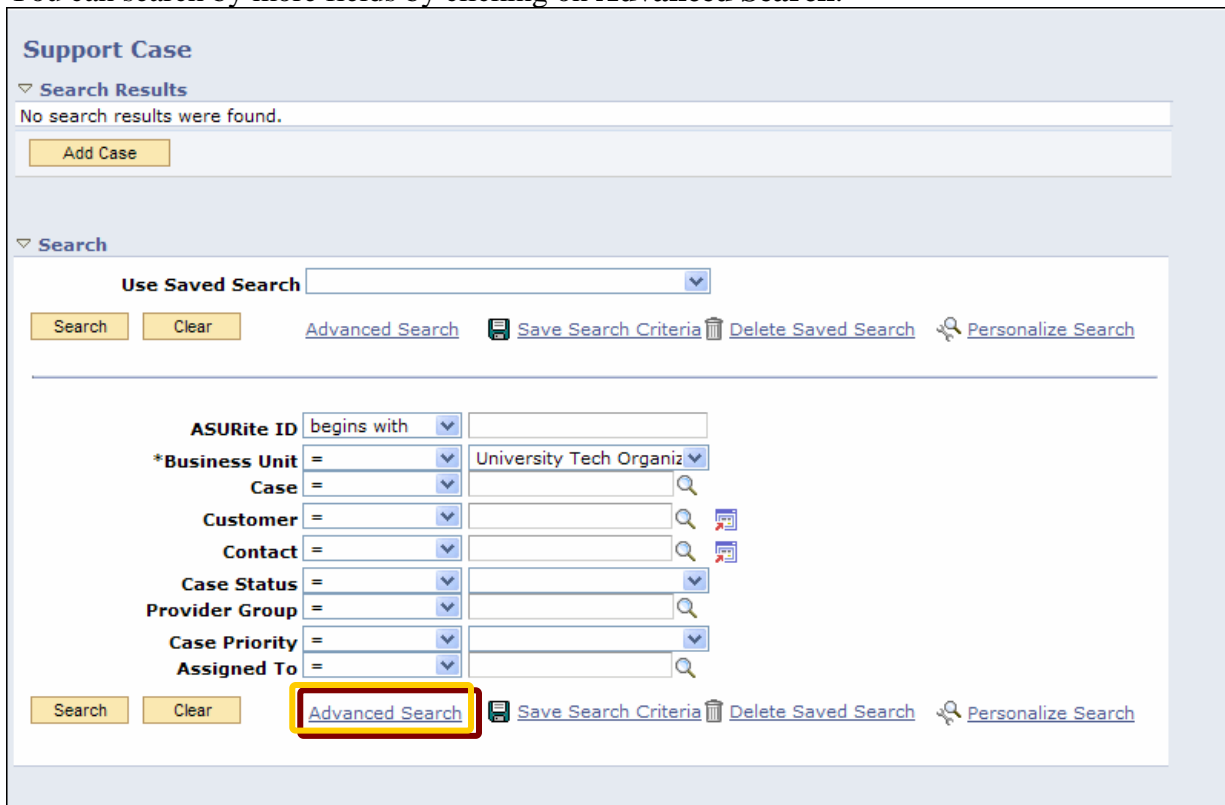
There is a powerful search engine attached to the support view. You can set up intricate search criteria and save them for later use.

Open CRM at <https://crm.oasis.asu.edu>

Navigate: **Support > Search Cases**



You can search by more fields by clicking on **Advanced Search**.





While you don't have to use the "Advanced Search", it gives you access to more fields to search on. See the notes on the next page for details.

Support Case

▼ **Search Results**
No search results were found.
[Add Case](#)

▼ **Search**

Use Saved Search 4

5 [Search](#) [Clear](#) [Basic Search](#) 3 [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

ASURite ID	begins with	<input type="text"/>
*Business Unit	=	University Tech Organiz
Case	=	<input type="text"/>
Customer Ref. #	begins with	<input type="text"/>
PIN	=	<input type="text"/>
SIN	=	<input type="text"/>
Customer	=	<input type="text"/>
Contact	=	<input type="text"/>
Customer Phone	=	<input type="text"/>
Customer Extension	=	<input type="text"/>
Customer Email	=	<input type="text"/>
Contact Phone	=	<input type="text"/>
Contact Extension	=	<input type="text"/>
Contact Email	=	<input type="text"/>
Case Status	=	<input type="text"/>
Summary	contains	<input type="text"/>
Case Type	=	<input type="text"/>
Category	=	<input type="text"/>
Specialty Type	=	<input type="text"/>
Detail	=	<input type="text"/>
Case Severity	=	<input type="text"/>
Provider Group	=	<input type="text"/>
Case Priority	=	<input type="text"/>
Source	=	<input type="text"/>
Product	=	<input type="text"/>
Problem Type	=	<input type="text"/>
Date Created	=	<input type="text"/>
Date Closed	=	<input type="text"/>
Assigned To	=	<input type="text"/>
IP Address	begins with	<input type="text"/>
MAC	begins with	<input type="text"/>
Building	begins with	<input type="text"/>
Room Number	begins with	<input type="text"/>
ASU Owner	=	<input type="text"/>

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)



1. Put the data you want to search for in the fields in the right column. Use the magnifying glasses and pull down lists to choose allowable values.
2. In the left column, you can change the “comparator” fields.
 - a. = this is the default comparator. The case must match what you put in the right-hand field exactly.
 - b. >, < Cases where the right hand value is greater than or less than will be matched.
 - c. **In** Changing the comparator to “in” allows you to select one or more values that will match.
 - d. **Is blank** will match cases where the field is blank in the case.
 - e. **Is not** will match all cases that do NOT have the value you put in the right hand field.
3. When you have your search criteria set, click on **Save Search Criteria** to save the search for future use.
4. To use a saved search, pull down the **Saved Search** field and select a search that you have saved before.
5. To use the search, click on **Search**.



Transfer Case to Another Provider Group: Support View

You may need to transfer a case from your provider group to another. To do this, select another provider group by clicking on the magnifying glass.

Case ID 404512
Customer Paul Stoll
Summary Summary of case
Open Cases 4

Status Open - New Case
Contact
Contact Method 480/415-4562
Customer Value

Problem
*Summary
Summary of case
Description
details for case

Case Information
Main More
*Business Unit University Tech Organizations
Quick Code
*Status Open - New Case
On Call Schedule
Provider Group UTO Blackboard
Assigned To Paul Stoll
Case Owner

Remember that we got to this screen by searching using the dashboard, or using the “search cases” link from the “support” menu.

Provider Group ID: begins with
Provider Group: begins with

Look Up Clear Cancel Basic Lookup

Search Results
View All
First 1-100 of 184 Last

Provider Group ID	Provider Group
ADVHELP	Advantage Help Line issues
ASUONLINE	ASU Online
BTS	Business Technology Services
CLASPHYSIC	Department of Physics
COECS	College of Education Computer Support
CONHI	CONHI Tech Support
COPP	COPP Technical Support
CRMCCCTD	PeopleSoft CRM Category Type Deta
CRMCCFUN	CRMCC - Support Functional Team
CRMCCTEC	CRMCC - CRM Technical Team
CRMSLFUN	CRMSL - Sales & Marketing Functional Team
CRNKTSJMC	Cronkite School of Journalism & Mass Communication

You can search for the new provider group by putting in parts of the ID and clicking on **Look Up**.

You can navigate through the list of provider groups using the right and left arrows.

When you find the provider group, click on it to transfer the case.

Once back in the case screen, click on the **save** button to save your changes.





Transfer Case to Another Provider Group: Quick View

You can also use the quick case view to transfer an existing case from one provider case to another.

To navigate to the quick case screen, go to <https://crm.oasis.asu.edu>
Navigate to **ASU Customizations > ASU Support > Quick Case**

Because you will be working with an existing case, click on **Find an Existing Value**.

Quick Case

[Find an Existing Value](#) [Add a New Value](#)

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

In this example, we searched for all open cases for a particular provider group. Once you have displayed the list of cases, click on the one that you want to transfer.

Quick Case

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Case ID: =

Business Unit: begins with

Provider Group ID: begins with

Case Status: begins with

[Search](#) [Clear](#) [Basic Search](#)

Search Results

[View All](#) First 1-4 of 4 Last


Business Unit	Case ID	Provider Group ID	Problem Summary	Case Status
UTO00	374584	UTOBLKBRD	Detail description of grades gives numbers as answers not letters	OPEN
UTO00	407270	UTOBLKBRD	CEM administration list	OPEN
UTO00	407410	UTOBLKBRD	Blackboar shell: 2009Summer8wk-W-TEL792-47080	OPEN

[Find an Existing Value](#) | [Add a New Value](#)




This is a portion of the quick case screen. You can change the provider group by picking a new provider group by clicking on the magnifying lens next to the provider group ID. You can then pick the new provider group from the list.

Quick Case


 **Case ID** 404512


***Case Status**

***Customer ASURite ID** 

Customer Name Paul Stoll

Contact Details

***Provider Group ID**  UTO Blackboard

Assigned To  Paul Stoll

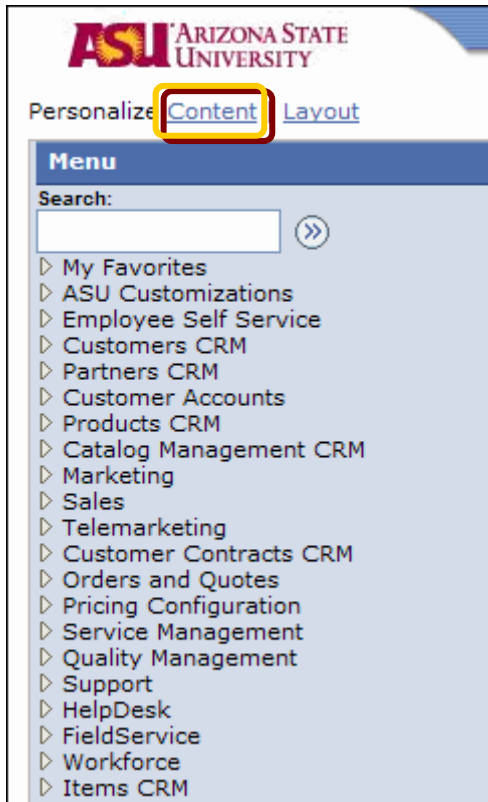


Show “My Cases” on Home Page

You can customize your CRM homepage so that it automatically shows you the cases assigned to you or your provider group.

To begin, launch CRM at <https://crm.oasis.asu.edu>

Click on the **Content** button.



Personalize Content

Welcome Message:

Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

CRM	PeopleSoft Applications	Wealth Management
<input type="checkbox"/> CONFIG360_GBL	<input checked="" type="checkbox"/> Menu	<input type="checkbox"/> My Calendar
<input type="checkbox"/> Recent Interactions	<input type="checkbox"/> My Reports	<input type="checkbox"/> My Clients at Risk
<input type="checkbox"/> CRM Worklist	<input type="checkbox"/> Main Menu	<input type="checkbox"/> My Tasks
<input type="checkbox"/> Relationship Grid		<input type="checkbox"/> My Top Clients
<input type="checkbox"/> Partner Management Center		<input type="checkbox"/> My Referrals
	Sales	
	<input type="checkbox"/> My Calendar	
	<input type="checkbox"/> My Tasks	
	<input type="checkbox"/> My Leads	
	<input type="checkbox"/> My Opportunities	
	<input type="checkbox"/> My Forecast	
		Orders and Quotes
		<input type="checkbox"/> Catalog Search
Cross-Customer Relationship		
<input type="checkbox"/> CRM Chart 1		
<input type="checkbox"/> CRM Chart 2		
<input type="checkbox"/> CRM Chart 3		
	FieldService	
Support	<input type="checkbox"/> Service Request	
<input checked="" type="checkbox"/> Agent - My Cases	<input type="checkbox"/> Agreements	
<input type="checkbox"/> Agent - My Cases	<input type="checkbox"/> Installed Products	
<input type="checkbox"/> RMA	<input type="checkbox"/> Recent Service Orders	
<input type="checkbox"/> Recent Support Cases		

[Return to Home](#)

Click on **Agent – My Cases** to display your cases on your home page.
Click on **Personalize Layout** to control where the cases display on the screen.



Click on **Agents – My Cases**
Click on the right arrow.
Click on **Save**.

Cases that are assigned to you will now appear on your CRM home page.

Personalize Layout

Basic Layout: 2 columns 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:

- Menu
- Agent - My Cases

Right Column:

--No Pagelets Selected--

Delete Pagelet

Save

[Return to Home](#)

Notify



Appendix A: Case Status Explanation

Status	Explanation
Failed Resolution	The customer has attempted the solution and the solution did not solve the customer's problem.
In Consideration	This solution has not been suggested to the customer yet. The solution is in the list so that it is available when you are ready to try it.
Successful Resolution	The solution solved the customer's problem. Only one solution can have this status on a case. If you want to change any solution information, you must reopen the resolution area of the case. This will change the status of the successful solution from Successful Resolution to Failed Resolution and enables all the solution fields again.
Waiting on Customer	You have suggested this solution to the customer, but you don't know whether the solution worked.
Withdrawn	The solution should not have been associated with the case, and will be disregarded in all solution-related metrics.