



Using CRM



Business Process Guide

for

All CRM Agents



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Getting Started in CRM

If you are new to CRM, there are a few starting steps.

First, you must request access to CRM.

Then you can modify the CRM home page and the CRM Support view page to make the software easier to use.

This section will show you how to get started.



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 four basic actions that a CRM agent can do in CRM:

1. Search for cases
2. Create new cases
3. Update cases
4. Solve cases

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

Search for a case	Create a case	Update a case	Solve a case
Support	Support	Support	Support
Quick	Quick	Email	Email
360 View			
Dashboard			

Each of the basic actions listed in this table will be described in detail. You can decide which CRM View (screen) works 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.



Requesting access

In order to access CRM, you must first request access to a role in PeopleSoft.

Details about which role to select and step by step instructions are at <http://help.asu.edu/node/611>

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.



Customize Your Case View

Once you have access to CRM, you can customize the CRM screen.
To customize your view, follow these steps:

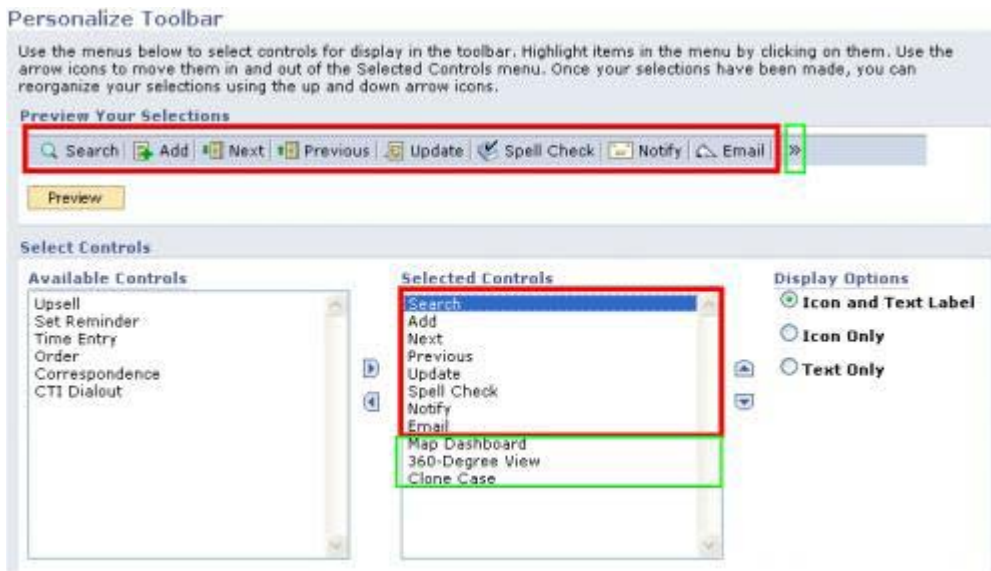
1. Open a web browser.
2. Go to <https://crm.oasis.asu.edu>.
3. Find an open case or start a new one using the support view (click on the Support link, then on Create Case.)



4. Click on the **Personalize** link in the top right.



5. Use the arrows to **move/remove** options in the **Selected Controls**.



Notes: The items in **Selected Controls** will appear (in order) on the toolbar. Only so many buttons can fit on the toolbar; make sure that the most frequent buttons you use appear at the top of that list.

To get even more space so that you can fit more options on the initial toolbar, you might want to consider changing the **Display Options** on the right to **Text Only** (or **Icon Only**, whichever you prefer).

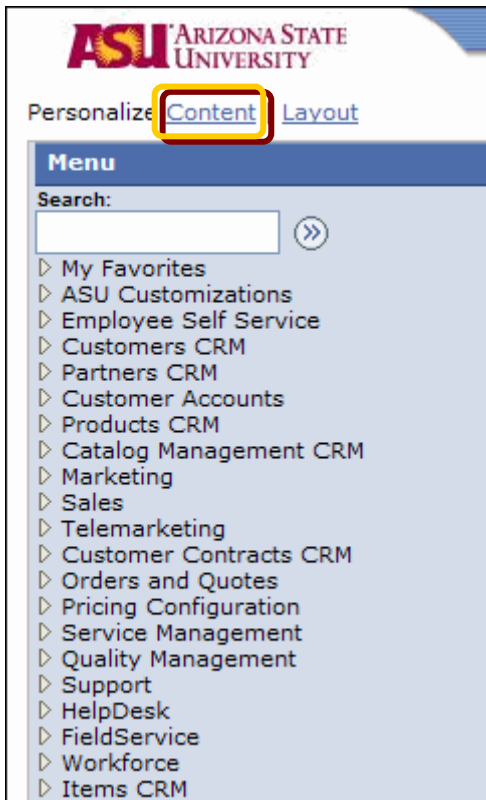


Show “My Cases” on Home Page

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 <ul style="list-style-type: none"><input type="checkbox"/> CONFIG360_GBL<input type="checkbox"/> Recent Interactions<input type="checkbox"/> CRM Worklist<input type="checkbox"/> Relationship Grid<input type="checkbox"/> Partner Management Center Cross-Customer Relationship <ul style="list-style-type: none"><input type="checkbox"/> CRM Chart 1<input type="checkbox"/> CRM Chart 2<input type="checkbox"/> CRM Chart 3 Support <ul style="list-style-type: none"><input checked="" type="checkbox"/> Agent - My Cases<input type="checkbox"/> Agent - My Cases<input type="checkbox"/> RMA<input type="checkbox"/> Recent Support Cases	PeopleSoft Applications <ul style="list-style-type: none"><input checked="" type="checkbox"/> Menu<input type="checkbox"/> My Reports<input type="checkbox"/> Main Menu Sales <ul style="list-style-type: none"><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 FieldService <ul style="list-style-type: none"><input type="checkbox"/> Service Request<input type="checkbox"/> Agreements<input type="checkbox"/> Installed Products<input type="checkbox"/> Recent Service Orders	Wealth Management <ul style="list-style-type: none"><input type="checkbox"/> My Calendar<input type="checkbox"/> My Clients at Risk<input type="checkbox"/> My Tasks<input type="checkbox"/> My Top Clients<input type="checkbox"/> My Referrals Orders and Quotes <ul style="list-style-type: none"><input type="checkbox"/> Catalog Search
---	---	--

[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

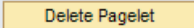
Agent - My Cases

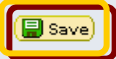
Right Column:

--No Pagelets Selected--

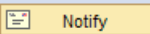








[Return to Home](#)





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.

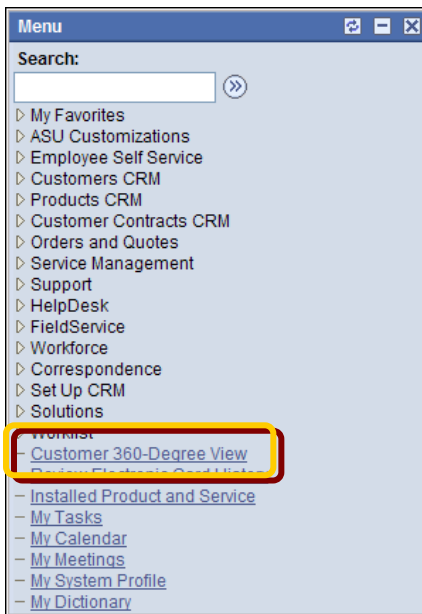
There is a search feature in the **Quick View** screen as well.

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



Search for a Case: 360-Degree Customer 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**.

The screenshot shows a web form titled 'Search For Customer'. Below the title is a 'Search' section with a dropdown arrow. The form contains several input fields for customer information: ASURITE Id, Organization, First Name, Last Name, Customer ID, Phone, Email, Address, City, State, Postal, and Country. At the bottom of the form is a 'Search' button, which is highlighted with a red rectangle. To the right of the 'Search' button is a link for 'Advanced Search'. 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

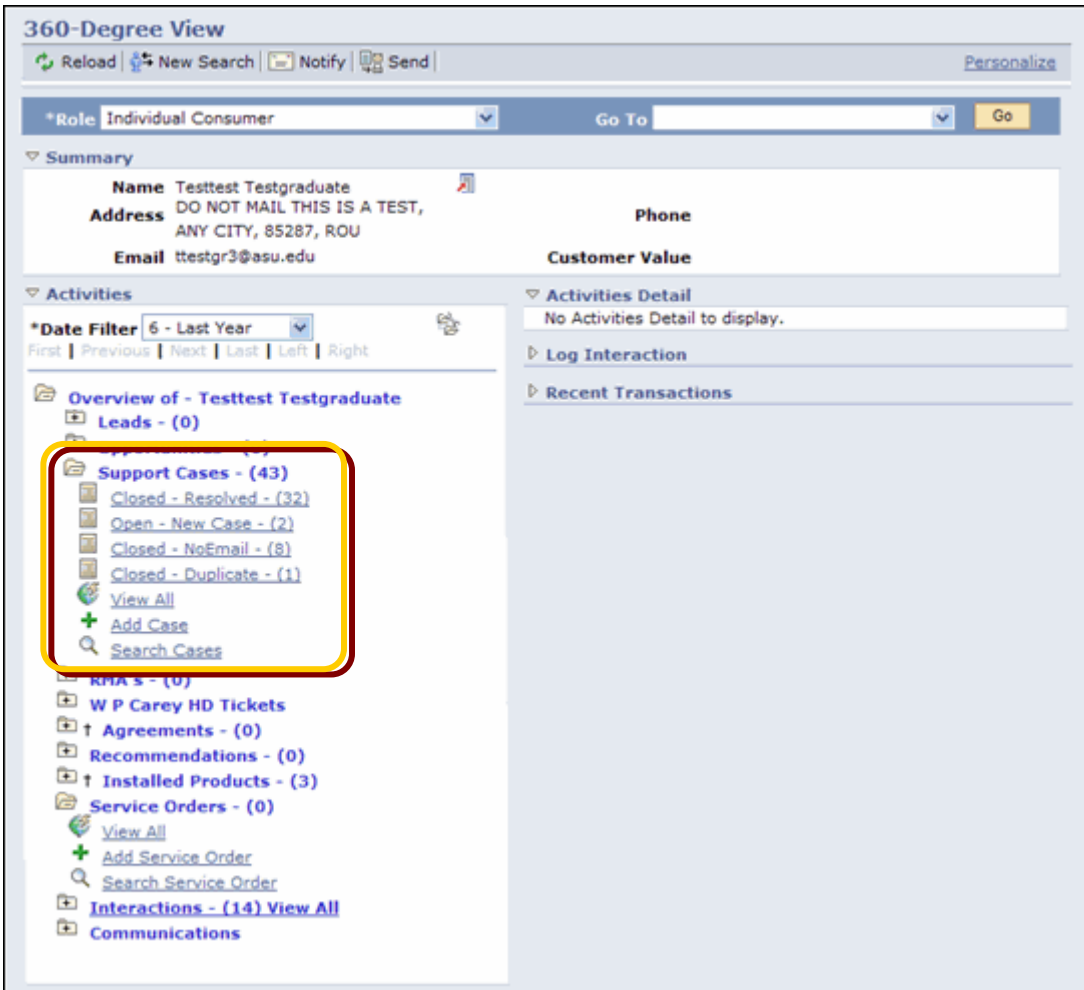
Cancel

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.



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

- Leads - (0)
- Support Cases - (43)**
 - [Closed - Resolved - \(32\)](#)
 - [Open - New Case - \(2\)](#)
 - [Closed - NoEmail - \(8\)](#)
 - [Closed - Duplicate - \(1\)](#)
 - [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

Activities Detail

No Activities Detail to display.

Log Interaction

Recent Transactions

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.

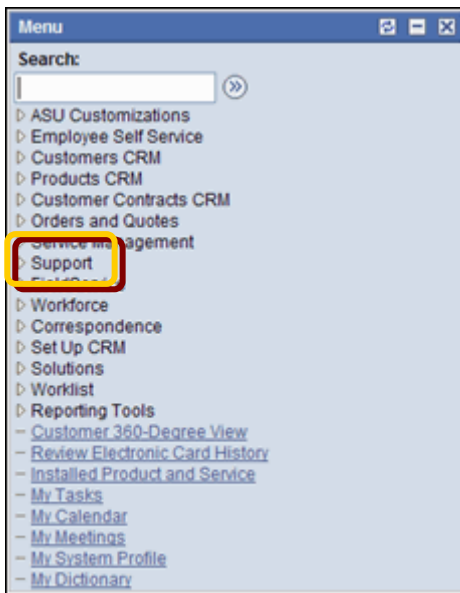
Click on the **Case ID** for the case that you want to access. The case will open in support view.

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.

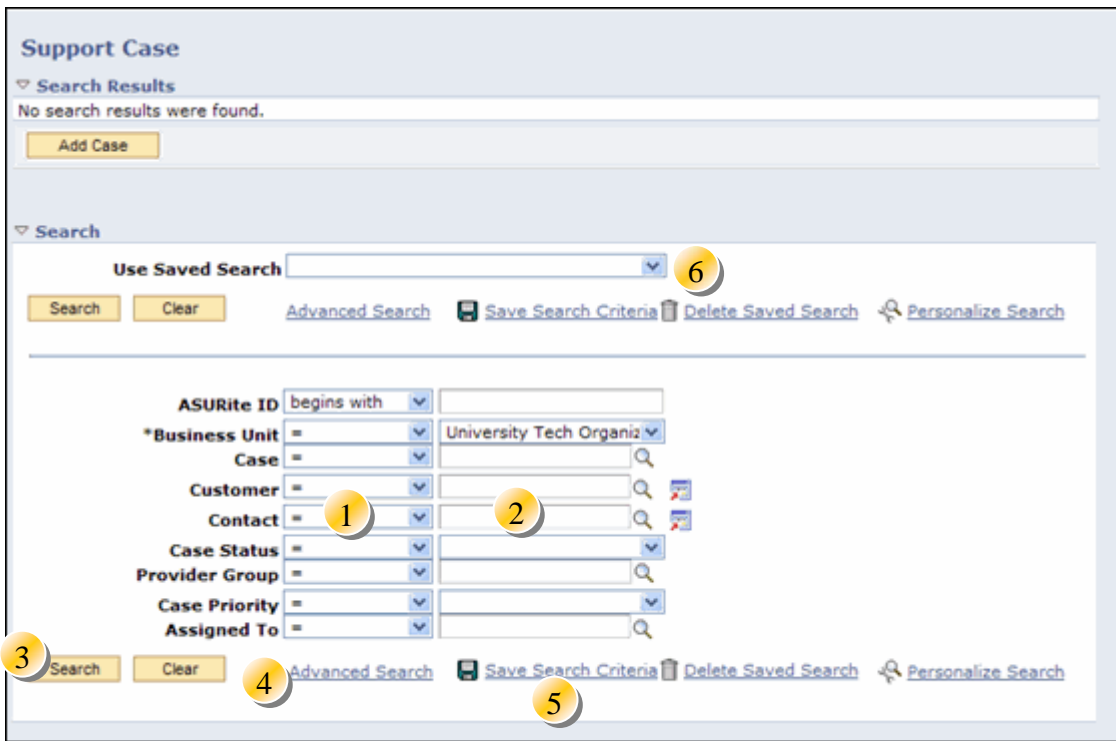


Login to CRM at <https://crm.oasis.asu.edu> with your ASURite ID and password

Click the **Support** link



Click the **Search Cases** link.



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

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.

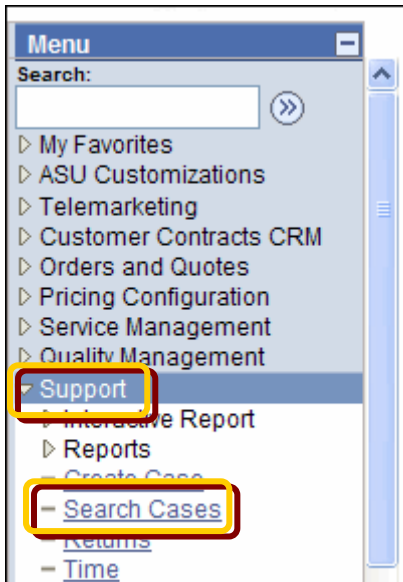


Saving a Search for Later Use: Support View

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**.

A screenshot of the 'Support Case' search interface. The page has a header 'Support Case' and a section 'Search Results' which states 'No search results were found.' Below this is an 'Add Case' button. The main section is titled 'Search' and contains a 'Use Saved Search' dropdown menu. Below the dropdown are buttons for 'Search', 'Clear', 'Advanced Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'. The 'Advanced Search' button is highlighted with a yellow box. Below these buttons is a form with several search criteria: ASURite ID (beginning with), *Business Unit (University Tech Organiz), Case, Customer, Contact, Case Status, Provider Group, Case Priority, and Assigned To. Each criterion has a dropdown menu and a search icon. At the bottom of the form are buttons for 'Search', 'Clear', 'Advanced Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'. The 'Advanced Search' button is highlighted with a yellow box.



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

ASURite ID begins with

***Business Unit** = University Tech Organiz

Case =

Customer Ref. # begins with

PIN =

SIN =

Customer =

Contact =

Customer Phone =

Customer Extension =

Customer Email =

Contact Phone =

Contact Extension =

Contact Email =

Case Status =

Summary contains

Case Type =

Category =

Specialty Type =

Detail =

Case Severity =

Provider Group =

Case Priority =

Source =

Product =

Problem Type =

Date Created =

Date Closed =

Assigned To =

IP Address begins with

MAC begins with

Building begins with

Room Number begins with

ASU Owner =

[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**.

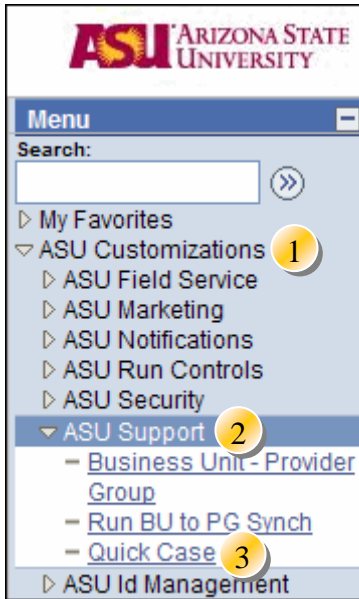


Search for a Case: Quick Case View

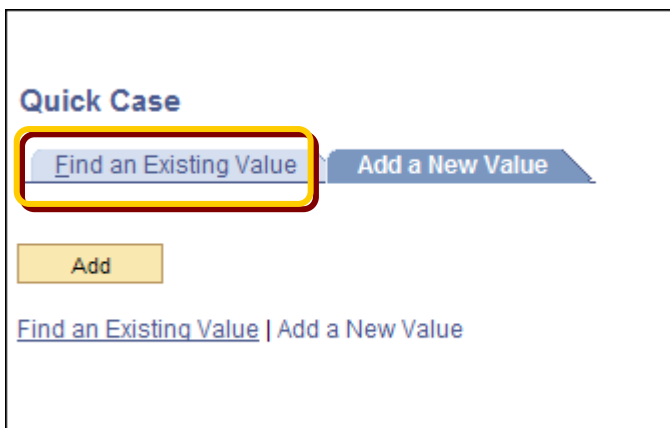
Quick view is a way to quickly *create* cases. It has a search function that you can use. It has limited functionality.

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 type="text"/>	
Business Unit:	begins with	<input type="text"/>	
Provider Group ID:	begins with	<input type="text"/>	
Case Status:	begins with	<input type="text"/>	

[Basic Search](#)
[Save Search Criteria](#)

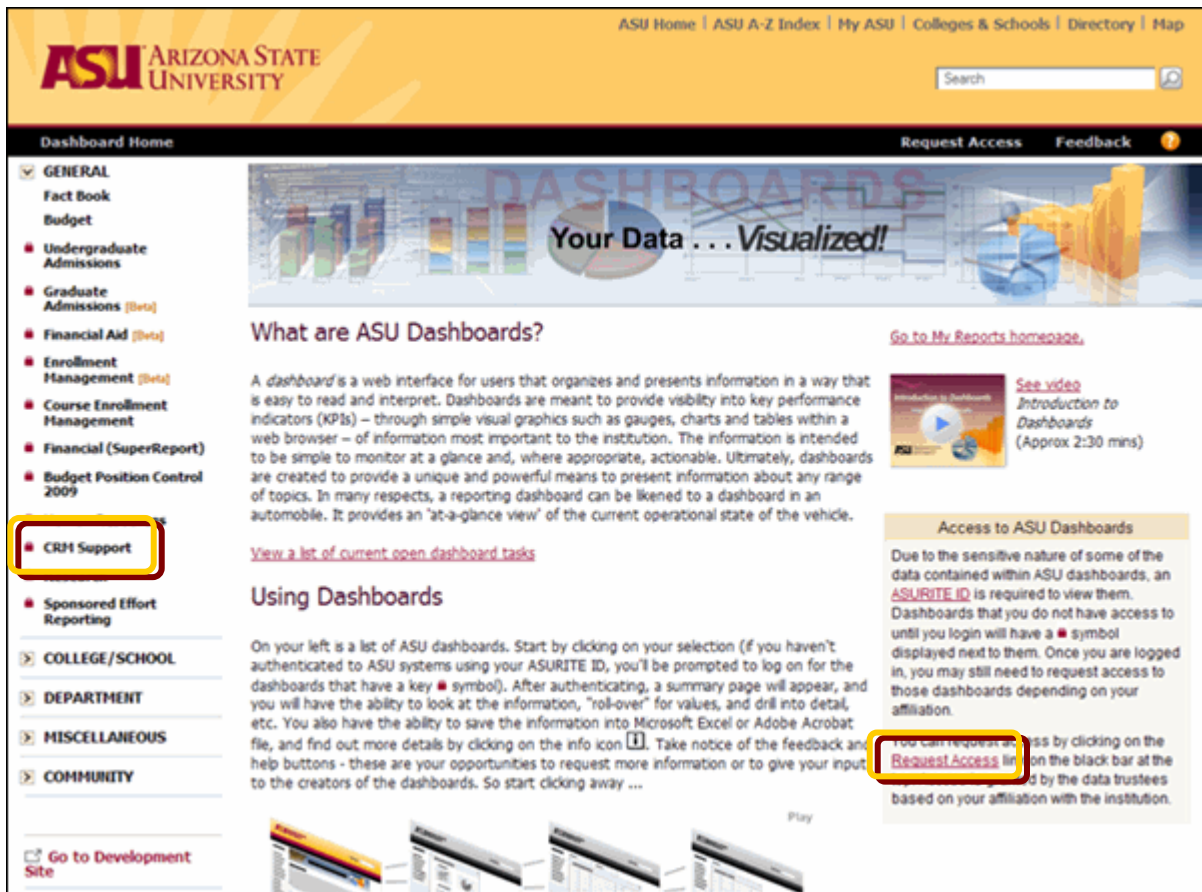
[Find an Existing Value](#) | [Add a New Value](#)

- 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.



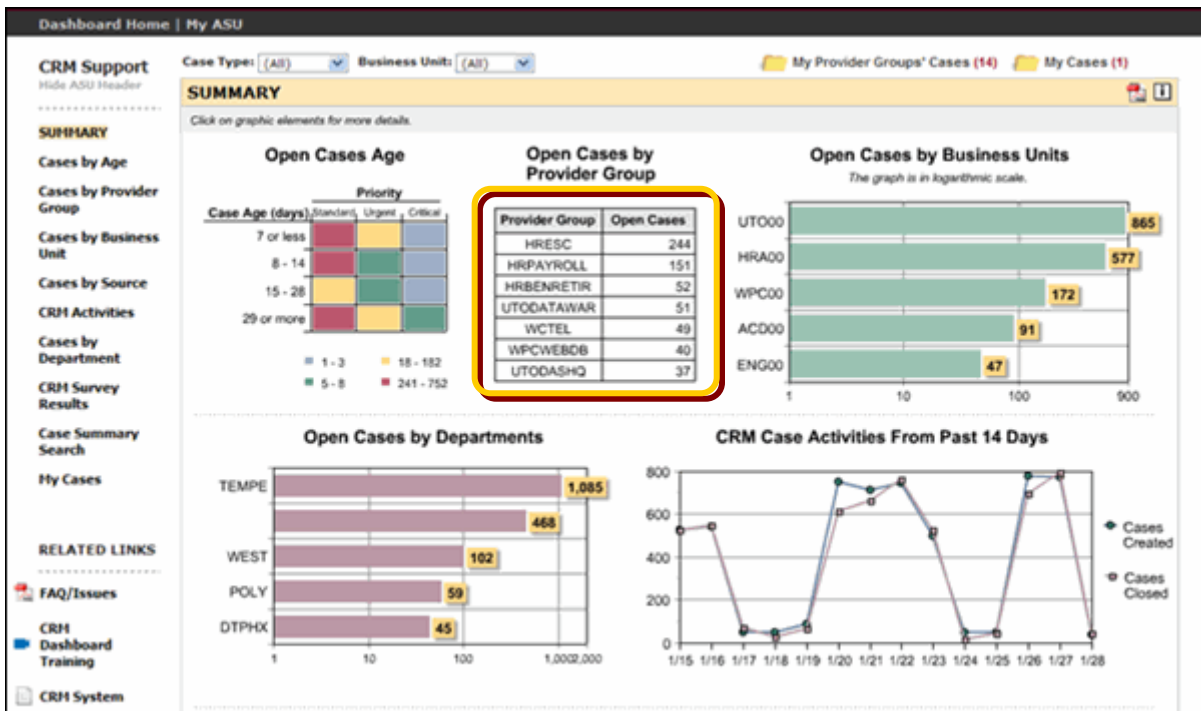
Search for a Case: Dashboard

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: (All)

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

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	1/9/09	HCMTECH	113		MSS Termination Updates
352820	1/9/09	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	WPCWEBDB		WPCTAC	168	Standard	Request	Access Management	OPWIP	Julie Kent	
319410	9/24/08	WPC00	WPCWEBDB			126	Standard	Issue		OPNEM	Shloh Nelson	
339832	11/25/08	WPC00	WPCWEBDB	2008-11-25		64	Standard	Issue		OPNEM	Shloh Nelson	2008-11-25
345673	12/16/08	WPC00	WPCWEBDB	2008-12-16		43	Standard	Issue		OPNEM	Shloh Nelson	2008-12-16
345673	12/17/08	WPC00	WPCWEBDB	2008-12-17		42	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,
- your provider group can set up an email to automatically create cases via email
- other agents can create cases and forward them to your provider group and,

YOU can create cases as an agent.

This section will show you how to create cases using the

- 360 Degree Customer View
- Support View
- Quick Case view
- Email



Create a Case: 360-Degree Customer View



Step	Action
1	Click the Customer 360-Degree View link.

Note: There are two ways to create a new case.

1. Create a Case Using the Customer 360-Degree View.
2. Create a Case Through the Support link.

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Home | MultiChannel Console | Add to Favorites | Sign out

Menu

Search:

ASU Customizations
Employee Self Service
Customers CRM
Products CRM
Customer Contracts CRM
Orders and Quotes
Service Management
Support
FieldService
Workforce
Correspondence
Set Up CRM
Solutions
Worklist
Reporting Tools
Customer 360-Degree View
Review Electronic Card History
Installed Product and Service
My Tasks
My Calendar
My Meetings
My System Profile
My Dictionary

Search For Customer

Search

Organization
First Name
Last Name
ASURITE Id
Customer ID
Phone
Email
Address
City
State
Postal
Country

Search Advanced Search

Step	Action
2	Enter as much information as possible into one more of the search fields (try to use a unique identifier like the ASURITE Id) and click the Search button to find a given customer.

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Menu

Search:

- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View**
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My System Profile
 - My Dictionary

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

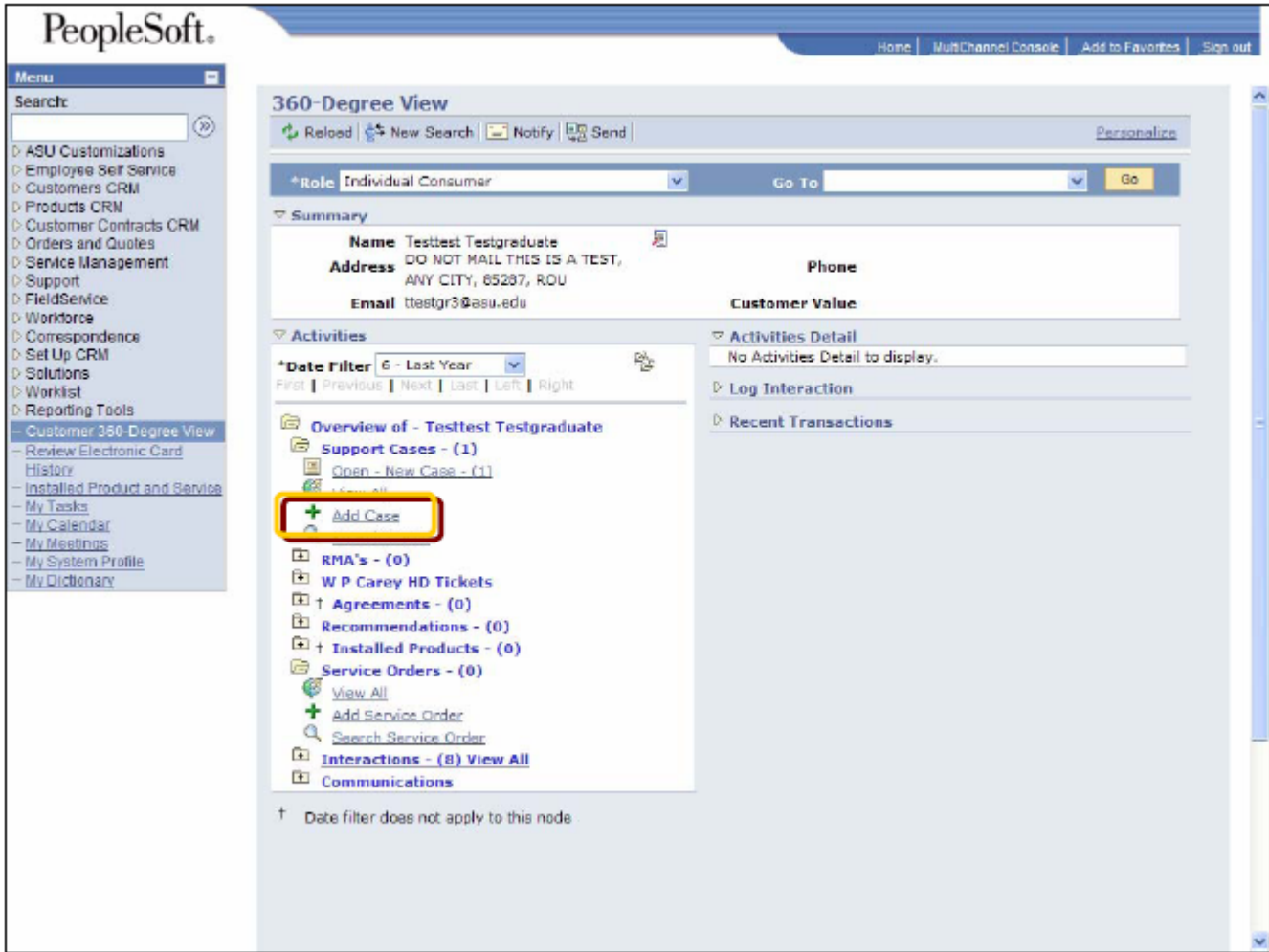
Campus ID begins with

Search Clear Cancel

Search Results

Last Name	First Name	ASURITE ID	Email	Address 1	City	Postal	Campus
Testtest	TestFirst		testaccount@mailinator.com				
Testgraduate	Testtest	testgr3	ttestgr3@asu.edu	DO NOT MAIL THIS IS A TEST	ANY CITY	85287	99382
test	test	ttest2		asdf	edf	ASDF	99501
test-qpay	test						

Step	Action
3	Select the appropriate Customer in the Search Results by clicking the Last or First Name link.



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Menu

Search: []

- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View**
 - Review Electronic Card
 - History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My System Profile
 - My Dictionary

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 - (1)**
 - Open - New Case - (1)
 - + Add Case**
- RMA's - (0)**
- W P Carey HD Tickets**
- + Agreements - (0)**
- Recommendations - (0)**
- + Installed Products - (0)**
- Service Orders - (0)**
 - View All
 - + Add Service Order
 - Search Service Order
- Interactions - (8) View All**
- Communications**

† Date filter does not apply to this node

Activities Detail

No Activities Detail to display.

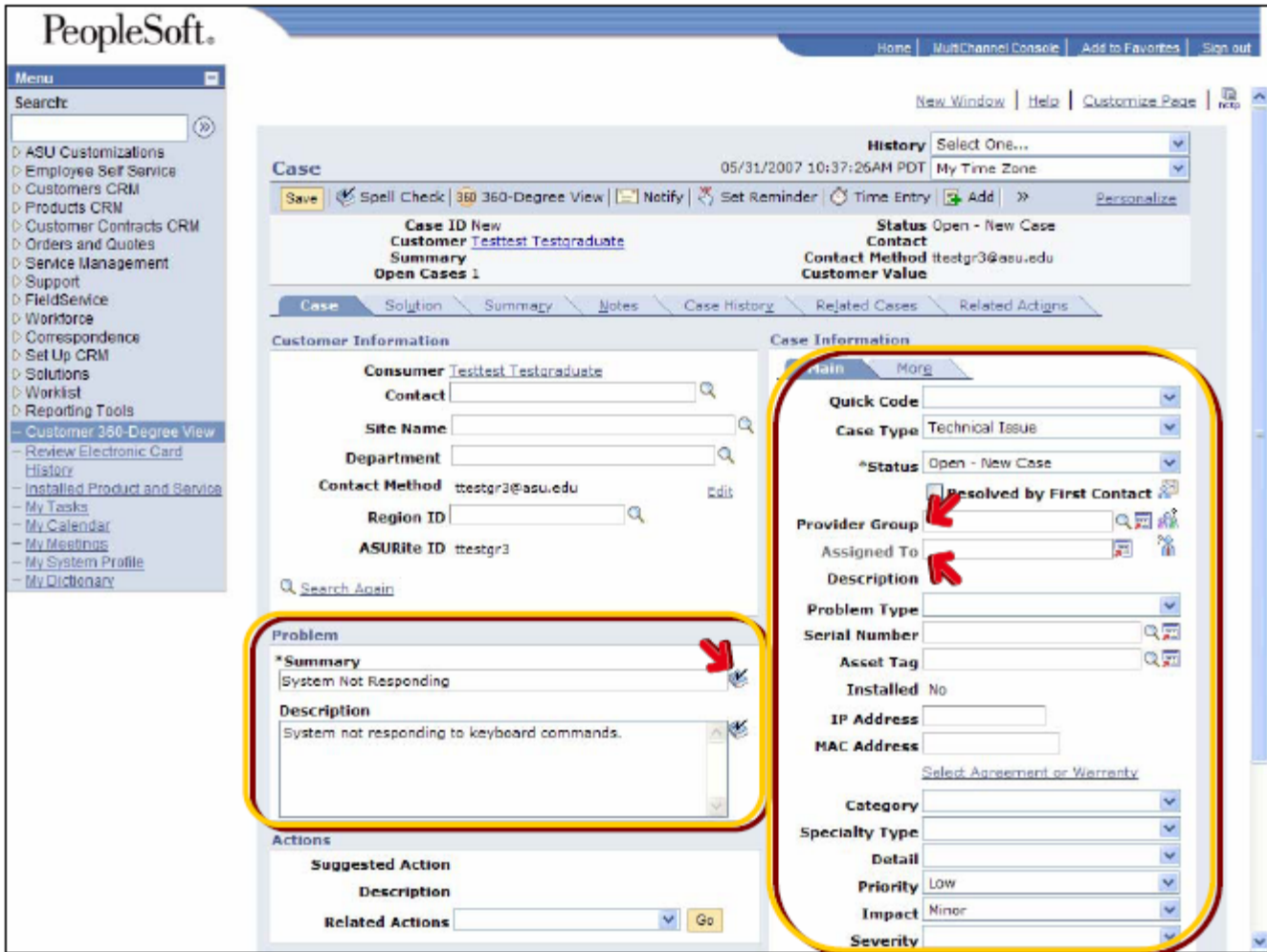
Log Interaction

Recent Transactions

Step	Action
4	To open a new case, click the Add Case link.

Note:

1. All available biographical information will be displayed on the 360-Degree View screen.
2. All cases display in the Activities section.



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New Window | Help | Customize Page | help

Case 05/31/2007 10:37:26AM PDT My Time Zone

Save | Spell Check | 360-Degree View | Notify | Set Reminder | Time Entry | Add | Personalize

Case ID New
Customer Testtest Testgraduate
Summary
Open Cases 1

Status Open - New Case
Contact
Contact Method itestgr3@asu.edu
Customer Value

Case Solution Summary Notes Case History Related Cases Related Actions

Customer Information

Consumer Testtest Testgraduate
Contact
Site Name
Department
Contact Method itestgr3@asu.edu Edit
Region ID
ASURite ID itestgr3

Search Again

Problem

*Summary
System Not Responding

Description
System not responding to keyboard commands.

Actions

Suggested Action
Description
Related Actions Go

Case Information

Main Morg

Quick Code
Case Type Technical Issue
*Status Open - New Case
☒ Resolved by First Contact
Provider Group
Assigned To
Description
Problem Type
Serial Number
Asset Tag
Installed No
IP Address
MAC Address
Select Agreement or Warranty
Category
Specialty Type
Detail
Priority Low
Impact Minor
Severity

Step	Action
5	Enter a Summary of the case (Problem). Then provide more details about the nature of the case in the Description text box.
6	Enter as much additional information as you know about the case using the drop down menus in the Case Information panel.

Note: There are spell checkers next to each text field.

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Search:

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- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View**
- Review Electronic Card History
- Installed Product and Service My Tasks
- My Calendar
- My Meetings
- My System Profile
- My Dictionary

Case

05/31/2007 10:37:26AM PDT

History Select One... My Time Zone

Save | Spell Check | 360-Degree View | Notify | Set Reminder | Time Entry | Add | Personalize

Case ID New
Customer [Testtest Testgraduate](#)
Summary
Open Cases 1

Status Open - New Case
Contact
Contact Method [ttestgr3@asu.edu](#)
Customer Value

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

Customer Information

Consumer [Testtest Testgraduate](#)
Contact
Site Name
Department
Contact Method [ttestgr3@asu.edu](#) Edit
Region ID
ASURite ID [ttestgr3](#)
Search Again

Case Information

Main | More

Case Type [Technical Issue](#)
*Status [Open - New Case](#)

Resolved by First Contact

Provider Group
Assigned To
Description
Problem Type
Serial Number
Asset Tag
Installed No
IP Address
MAC Address
Select Agreement or Warranty
Category
Specialty Type
Detail
Priority Low
Impact Minor
Severity

Problem

*Summary
System Not Responding

Description
System not responding to keyboard commands.

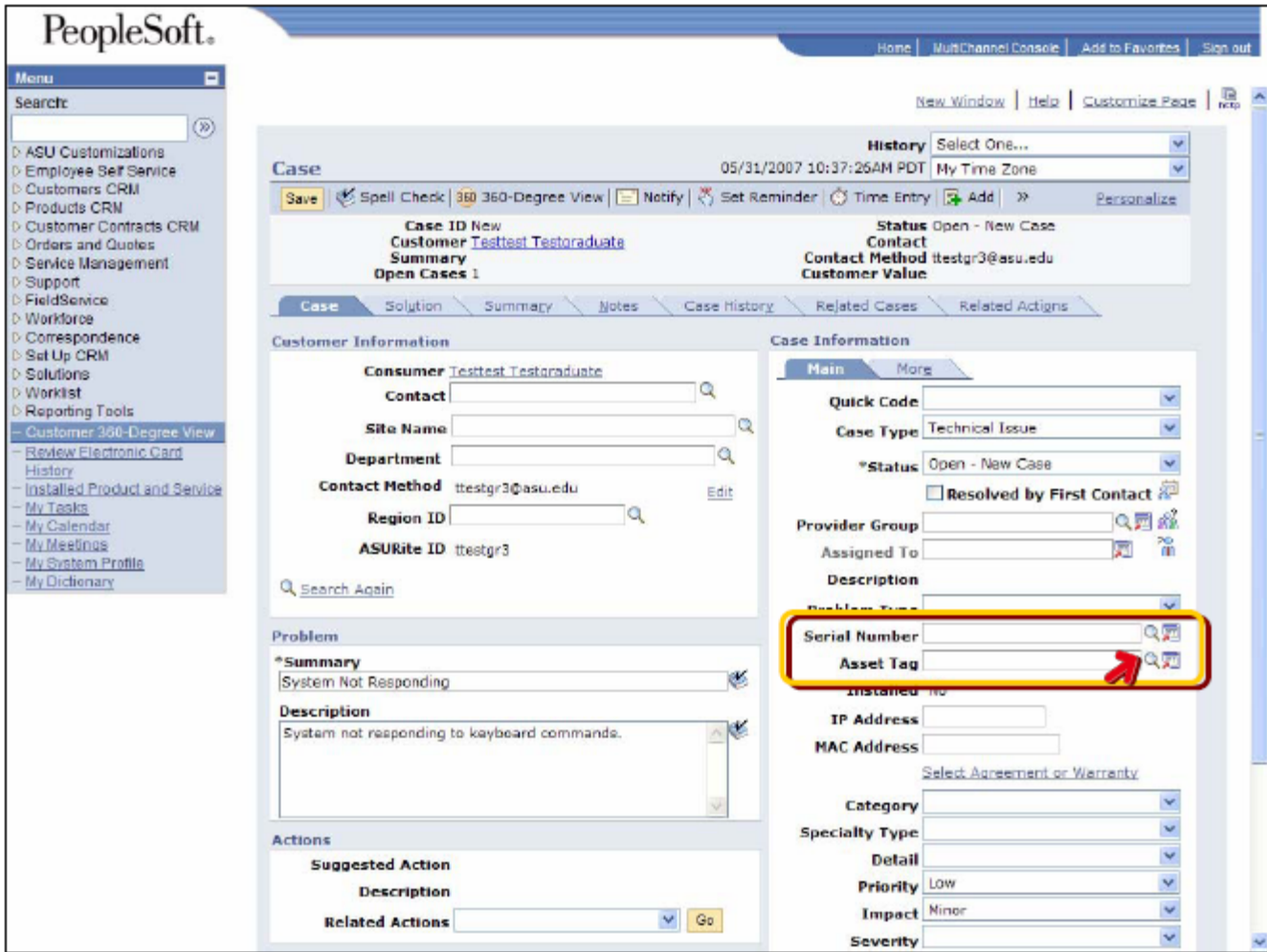
Actions

Suggested Action
Description
Related Actions

Note: By default, Technical Issue is selected and displayed in the Case Type field. By default, Open – New Case is selected and displayed in the *Status field.

[illegible]

Note: When opening new cases, you may notice that the Provider Group and Assigned To fields default to the provider group and user that is opening the case. You will learn how to change provider groups shortly.




The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with options like 'ASU Customizations', 'Employee Self Service', 'Customers CRM', etc. The main area displays a 'Case' record for 'Testtest Testgraduate'. The 'Case Information' section on the right includes fields for 'Quick Code', 'Case Type' (Technical Issue), 'Status' (Open - New Case), 'Provider Group', 'Assigned To', 'Description', 'Serial Number', 'Asset Tag', 'IP Address', 'MAC Address', 'Category', 'Specialty Type', 'Detail', 'Priority' (Low), 'Impact' (Minor), and 'Severity'. The 'Asset Tag' field is highlighted with a red box, and a red arrow points to the magnifying glass icon next to it, indicating where to click to search for an asset tag.

Step	Action
7	Click the magnifying glass next to the Asset Tag field to search for the appropriate asset tag.

Note: Always try to use a unique identifier like the Asset Tag (property control) or Serial Number to locate inventory to which the case is related.

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Menu

Search:

- ASU Customizations
- Employee Self Service
- Customers CRM
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- Customer Contracts CRM
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Look Up Installed Product

SetID: begins with

Customer Name: begins with

Product Name: begins with

Serial ID: begins with

Asset Tag: begins with

Region ID: begins with

ASU Owned ☐

Name: begins with

Site Name: begins with

Department: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.


[View All](#)

SetID	Customer Name	Alternate Character Name	Product Name	Serial ID	Asset Tag	Region ID
ASU00	Arizona State University	(blank)	Acer V771	99902210412501957P7D421	4018590	BA323L
ASU00	Arizona State University	(blank)	Acomdata CDE161040U2E	231143003053	(blank)	BA209B
ASU00	Arizona State University	(blank)	Acomdata CDE161040U2E	231143003058	(blank)	BA209B
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761274	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761278	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761233	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761277	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761240	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761408	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761272	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761409	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761275	(blank)	BA215A1
ASU00	Arizona State University	(blank)	Addonics AEPSD240UM	9526761237	(blank)	BA215A1

Step	Action
8	Enter the Asset Tag information you received from the customer.
9	Click the Look Up button.

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New Window | Help | 

Menu

Search:


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- Workforce
- Correspondence
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- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My System Profile
 - My Dictionary


Look Up Installed Product

SetID: begins with 

Customer Name: begins with

Product Name: begins with


Serial ID: begins with 


Asset Tag: begins with 4017041 

Region ID: begins with

ASU Owned ☐

Name: begins with

Site Name: begins with 

Department: begins with 

Look Up Clear Cancel Basic Lookup

Search Results

View All

SetID	Customer Name	Alternate Character Name	Product Name	Serial ID	Asset Tag	Region ID	ASU Owned	Name	Site Name	Department
ASU00			IBM 522110U	13522110UKPN593	4017041	PC820E	Y	(blank)	(blank)	R1617

Step	Action
10	Once the asset has been located, click the Asset Tag link.

PeopleSoft.

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- Employee Self Service
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- Worklist
- Reporting Tools
- Customer 360-Degree View
- Review Electronic Card History
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- My System Profile
- My Dictionary

Customer Information

Consumer: Testtest Testgraduate

Contact: [Text Box]

Site Name: [Text Box]

Department: [Text Box]

Contact Method: testgr3@asu.edu

Region ID: [Text Box]

ASURite ID: testgr3

Search Again

Case Information

Main | More

Quick Code: [Text Box]

Case Type: Technical Issue

*Status: Open - New Case

☐ Resolved by First Contact

Provider Group: [Text Box]

Assigned To: [Text Box]

Description: IBM 622110U

Problem Type: [Text Box]

Serial Number: 1S622110UKPN6934

Asset Tag: 4017041

Installed: Yes

IP Address: [Text Box]

MAC Address: [Text Box]

Select Agreement or Warranty

Category: [Text Box]

Specialty Type: Account Management

Detail: Facilities

Priority: Hardware

Impact: Networking

Severity: PeopleSoft

Web Applications

Production Services

Software

Related Actions

Save Case | Find Solutions | Escalate Case

Audit History

Created	By
Modified	By

Step	Action
11	Click the Category drop down list and select the appropriate item.

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- My Dictionary

Customer Information

Consumer: Testtest Testgraduate

Contact: [Search]

Site Name: [Search]

Department: [Search]

Contact Method: testgr3@asu.edu [Edit]

Region ID: [Search]

ASURite ID: testgr3

[Search Again]

Problem

*Summary: System Not Responding

Description: System not responding to keyboard commands.

Actions

Suggested Action

Description: [Search]

Related Actions: [Go]

Save Case Find Solutions Escalate Case

Audit History

Created By

Modified By

Case Information

Main More

Quick Code: [Dropdown]

Case Type: Technical Issue

*Status: Open - New Case

☐ Resolved by First Contact

Provider Group: [Search]

Assigned To: [Search]

Description: IBM 622110U

Problem Type: [Dropdown]

Serial Number: 1S622110UKPN6934 [Search]

Asset Tag: 4017041 [Search]

Installed: Yes

IP Address: [Search]

MAC Address: [Search]

Select Agreement or Warranty

Category: Hardware

Specialty Type: [Dropdown]

Detail: Blade Center

Priority: Disk Drive

Impact: IBM Mainframe

Severity: Monitor

Source: Peripheral

Printer

Screen

Tape Silo

UNIX Server

Windows Server

Workstation

Step	Action
12	Click the Specialty Type drop down list and select an appropriate item.

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- My Meetings
- My System Profile
- My Dictionary

Customer Information

Consumer: Testtest Testgraduate

Contact: [Text Field]

Site Name: [Text Field]

Department: [Text Field]

Contact Method: testgr3@asu.edu

Region ID: [Text Field]

ASURite ID: testgr3

Search Again

Problem

*Summary: System Not Responding

Description: System not responding to keyboard commands.

Actions

Suggested Action

Description: [Text Field]

Related Actions: [Text Field] Go

Save Case Find Solutions Escalate Case

Audit History

Created By

Modified By

Case Information

Main More

Quick Code: [Text Field]

Case Type: Technical Issue

*Status: Open - New Case

Resolved by First Contact

Provider Group: [Text Field]

Assigned To: [Text Field]

Description: IBM 622110U

Problem Type: [Text Field]

Serial Number: 1S622110UKPN6934

Asset Tag: 4017041

Installed: Yes

IP Address: [Text Field]

MAC Address: [Text Field]

Select Agreement or Warranty

Category: Hardware

Specialty Type: Workstation

Detail

Priority: Desktop - Apple

Impact: Desktop - PC

Severity: Laptop - Apple

Laptop - PC

Step	Action
13	Click the Detail drop down list and choose the appropriate item.

Note: The next few steps will take you through assigning the case to another provider group.

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- Review Electronic Card History
- Installed Product and Service
- My Tasks
- My Calendar
- My Meetings
- My System Profile
- My Dictionary

Customer Information

Consumer: Testtest Testgraduate

Contact:

Site Name:

Department:

Contact Method: testgr3@asu.edu [Edit](#)

Region ID:

ASURite ID: testgr3

[Search Again](#)

Problem

*Summary

System Not Responding

Description

System not responding to keyboard commands.

Actions

Suggested Action

Description

Related Actions: [Go](#)

[Save Case](#) [Find Solutions](#) [Escalate Case](#)

Audit History

Created	By
Modified	By

Case Information

Main | More

Quick Code:

Case Type: Technical Issue

*Status: Open - New Case

☐ Resolved by First Contact

Provider Group [Search](#) [Add](#) [Edit](#)

Assigned To:

Description: IBM 622110U

Problem Type:

Serial Number: 1S622110UKPN6934

Asset Tag: 4017041

Installed: Yes

IP Address:

MAC Address:

Select Agreement or Warranty

Category: Hardware

Specialty Type: Workstation

Detail: Laptop - PC

Priority: Low

Impact: Minor

Severity:

Source: Direct Call

Step	Action
14	Click the Provider Group magnifying glass.

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Employee Self Service
Customers CRM
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Worklist
Reporting Tools
Customer 360-Degree View
Review Electronic Card
History
Installed Product and Service
My Tasks
My Calendar
My Meetings
My System Profile
My Dictionary

Provider Group ID: begins with

Provider Group: >=

Look Up Clear Cancel Basic Lookup

Search Results


View All First 1-100 of 108 Last

Provider Group ID	Provider Group
ADMIN	Administrator
BUSOFFICE	UTO Operations Business Office
CAMPUSHLTH	Campus Health
COORDS	Coordinators
CORE	Care
CRMCCFUN	CRMCC - Support Functional Team
CRMCCTEC	CRMCC - Call Center Technical Team
CRMFSFUN	CRMFS - Field Services Functional Team
CRMFS TEC	CRMFS - Field Services Technical Team
CRMMEFUN	CRMME - Marketing Functional Team
CRMME TEC	CRMME - Marketing Technical Team
CRMOMFUN	CRMOM - Online Marketing Functional Team
CRMOMTEC	CRMOM - Online Marketing Technical Team
CRMSLFUN	CRMCC - Sales Functional Team
CRMSLTEC	CRMCC - Sales Technical Team
CRMTMFUN	CRMTM - TeleMarketing Functional Team
CRMTMTEC	CRMTM - TeleMarketing Technical Team
DATA CENTER	Data Center
DESIGN	Design
EDGE	UTO Operations Edge
ELECTRCSHP	Electric Shop
ENG_CSG	ETS Customer Support Group
ENG_CSG-LU	ETS Customer Support Group - Linux/Unix Desktop
ENG_CSGENG	ETS Customer Support Group - Engineering / Linux
ENG_CSGWIN	ETS Customer Support Group - Windows Desktop
ENG_HD	ETS Helpdesk

Step	Action
15	Click the Provider Group ID text box, type all or part of the group ID you are searching and click the Look Up button.

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Reporting Tools
Customer 360-Degree View
Review Electronic Card
History
Installed Product and Service
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My Dictionary

Provider Group ID: begins with WPC

Provider Group: >=

Look Up Clear Cancel Basic Lookup

Search Results

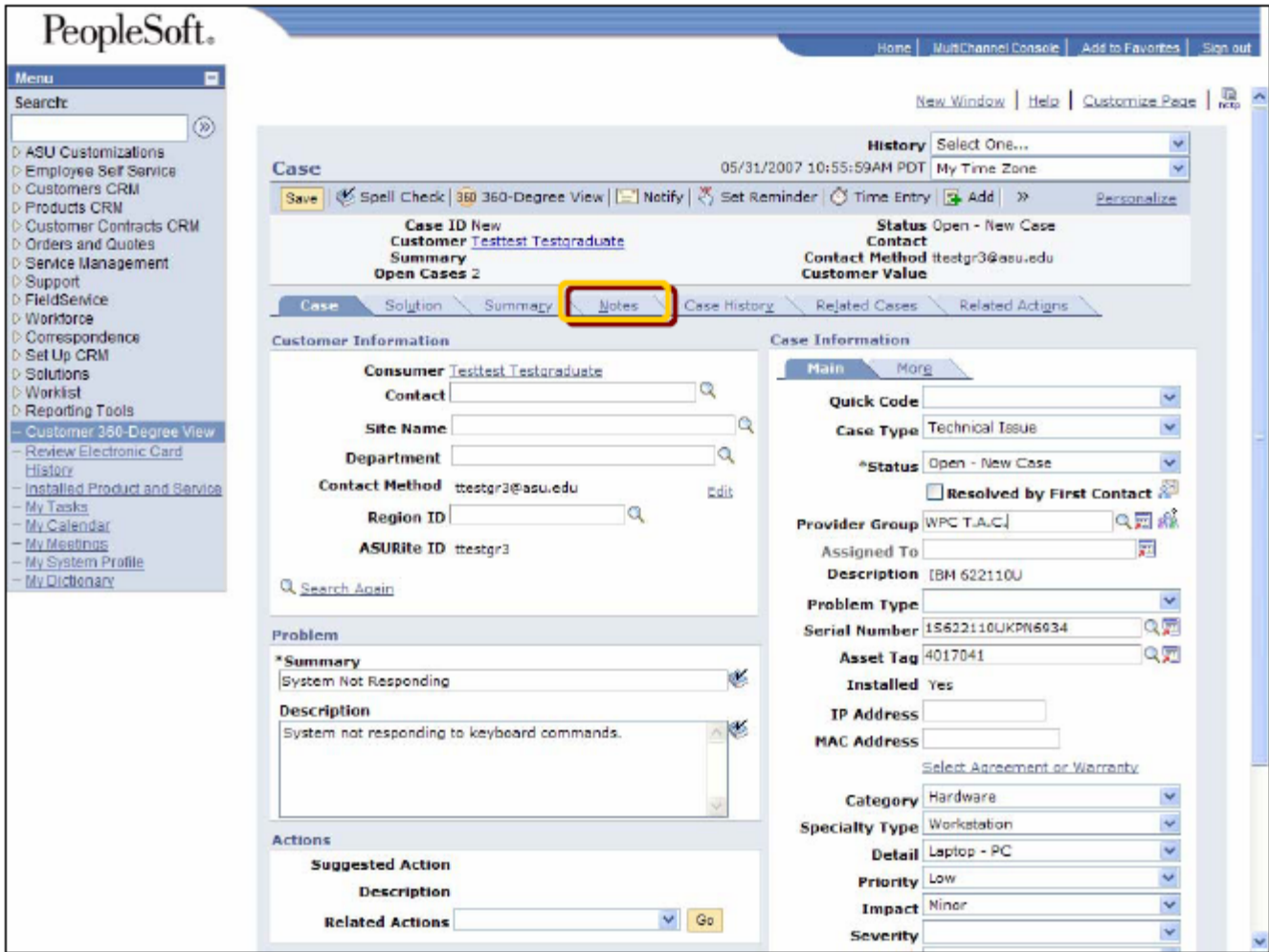
View All First 1-12 of 13 Last

Provider Group ID	Provider Group
WPCBLKRRD	WPC Blackboard
WPCCLSSUP	WPC Classroom Support
WPCCRMCC	WPC - CRMCC Support Functional Team
WPCCRMSL	WPC - CRMML Sales Functional Team
WPCDESK	WPC Desktop
WPCINSTDSN	WPC Instructional Design
WPCMEDIA	WPC Media
WPCNET	WPC Network
WPCPART	WPC Part
WPCRSRCH	WPC RESEARCH
WPCSUIEWU	WPC Suite and Walkup
WPCTAC	WPC T.A.C.
WPCWEBDB	WPC Web Database

Step	Action
16	Once the results have been narrowed, select the appropriate Provider Group to which to assign the case.

Note:

1. If you are a member of the selected provider group, a case can be assigned to the other members of that provider group.
2. If you are not a member of the selected provider group, the case can only be assigned at the group level.



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New Window | Help | Customize Page | help

Case 05/31/2007 10:55:59AM PDT

Save | Spell Check | 360-Degree View | Notify | Set Reminder | Time Entry | Add | Personalize

Case ID New
Customer Testtest Testgraduate
Summary
Open Cases 2

Status Open - New Case
Contact
Contact Method Itestgr3@asu.edu
Customer Value

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

Customer Information

Consumer Testtest Testgraduate
Contact
Site Name
Department
Contact Method Itestgr3@asu.edu **Edit**
Region ID
ASURite ID Itestgr3

Search Again

Problem

***Summary**
System Not Responding

Description
System not responding to keyboard commands.

Actions

Suggested Action
Description
Related Actions **Go**

Case Information

Main **More**


Quick Code
Case Type Technical Issue
***Status** Open - New Case
☐ **Resolved by First Contact**
Provider Group WPC T.A.C.
Assigned To
Description IBM 622110U
Problem Type
Serial Number 15622110UKPN6634
Asset Tag 4017041
Installed Yes
IP Address
MAC Address
[Select Agreement or Warranty](#)
Category Hardware
Specialty Type Workstation
Detail Laptop - PC
Priority Low
Impact Minor
Severity

Step	Action
17	Click the Notes tab to enter notes about the case.

Note: From the Notes screen you can enter additional information so that other technicians can view the history of interactions in the case. Generally, notes are used to record each interaction (i.e., emails, phone calls) with the customer.

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- Customer 360-Degree View**
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 - Installed Product and Service
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 - My System Profile
 - My Dictionary

Case

06/04/2007 1:52:25PM PDT My Time Zone

Save | Spell Check | 360 360-Degree View | Notify | Set Reminder | Time Entry | Add | Personalize

Case ID New
Customer Testtest Testgraduate
Summary
Open Cases 3

Status Open - New Case
Contact
Contact Method testgr3@asu.edu
Customer Value

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

Notes Summary

No notes or attachments have been added to this Case.

Add a Note

*Subject

Details

Note Information

*Visibility Internal
Note Type
Origin

Contact Information

Customer
Contact
Employee

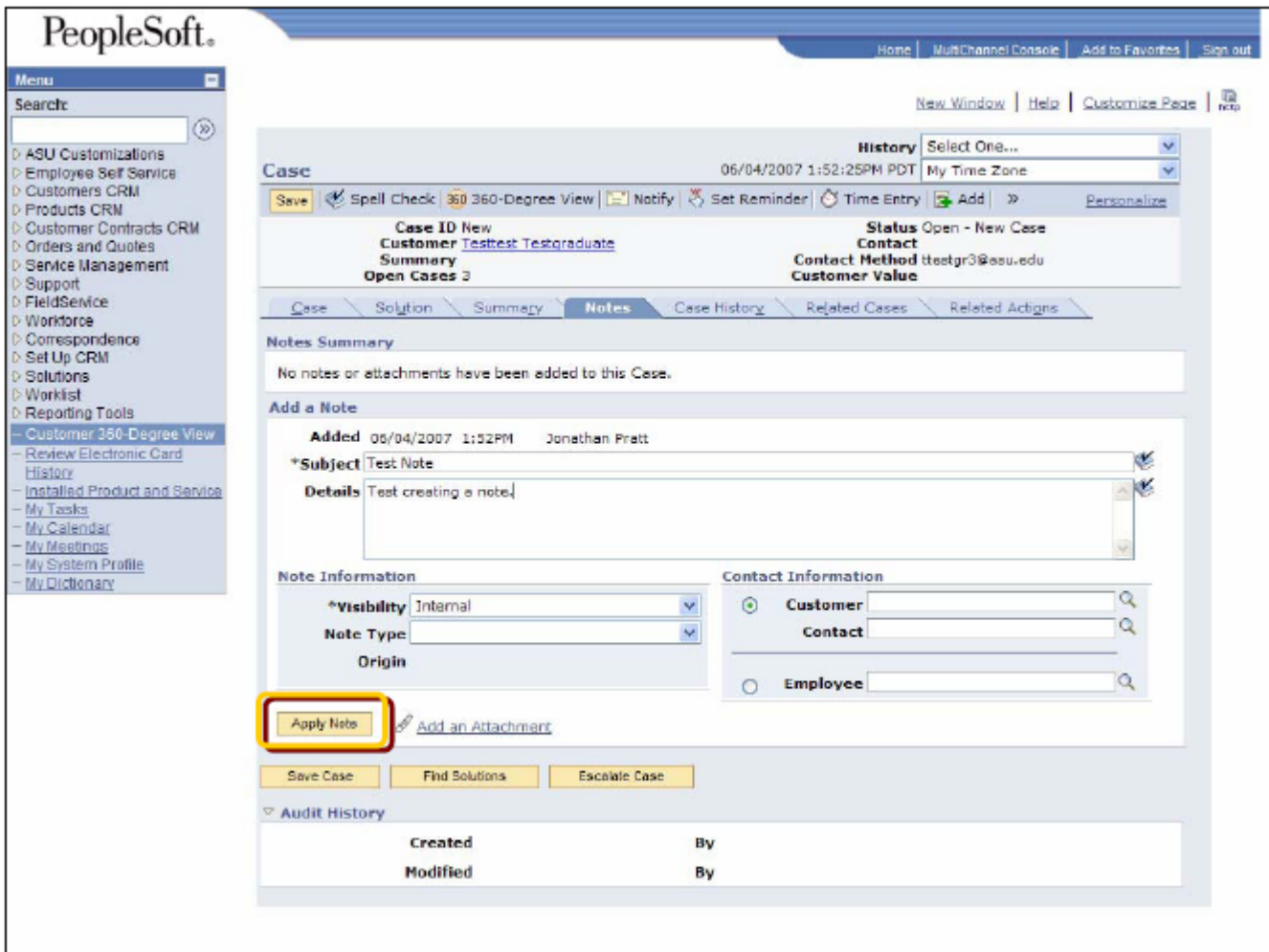
Apply Note | Add an Attachment

Save Case | Find Solutions | Escalate Case

Audit History

Created	By
Modified	By

Step	Action
18	Enter relevant information in the Subject and Details text boxes.



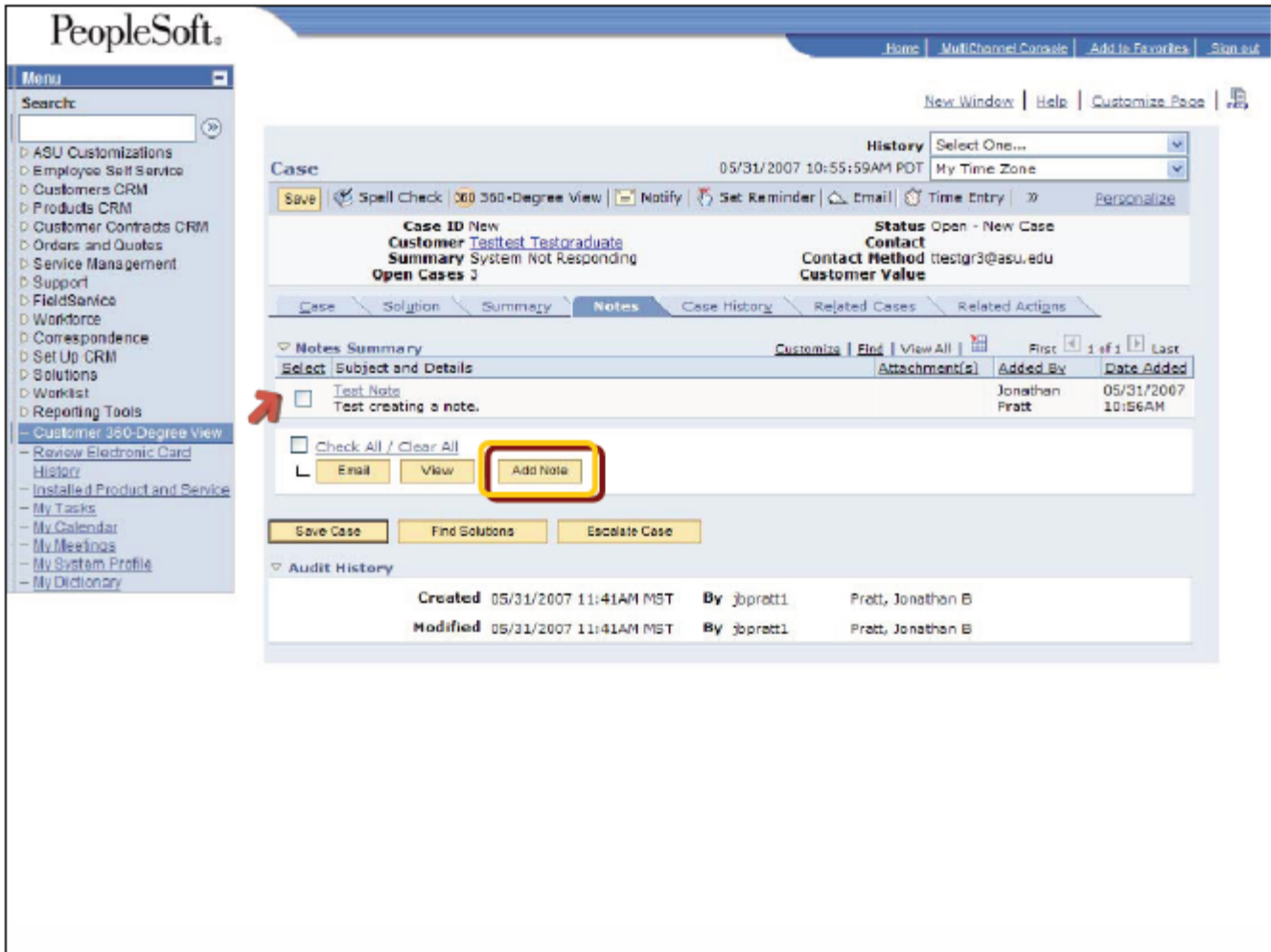
The screenshot shows the PeopleSoft CRM 'Case' management interface. The left sidebar contains a 'Menu' with various options like 'ASU Customizations', 'Employee Self Service', and 'Customer Contracts CRM'. The main area displays the 'Case' details for a new case, including fields for 'Case ID', 'Customer', 'Status', 'Contact', 'Contact Method', and 'Customer Value'. The 'Notes' tab is selected, showing a 'Notes Summary' and an 'Add a Note' section. The 'Add a Note' section includes fields for 'Added' (date and time), 'Subject', and 'Details'. Below these are 'Note Information' and 'Contact Information' sections. The 'Apply Note' button is highlighted with a red box.

Step	Action
19	Click the Apply Note button.

Note: It is possible that through your interactions, you may have solved a problem before a case is ever opened for it. Use Notes to record each one of your interactions before saving the case.

Notes cannot be edited once the case is saved.

Click the Apply Note button to record the content of each interaction with the customer before saving the case.

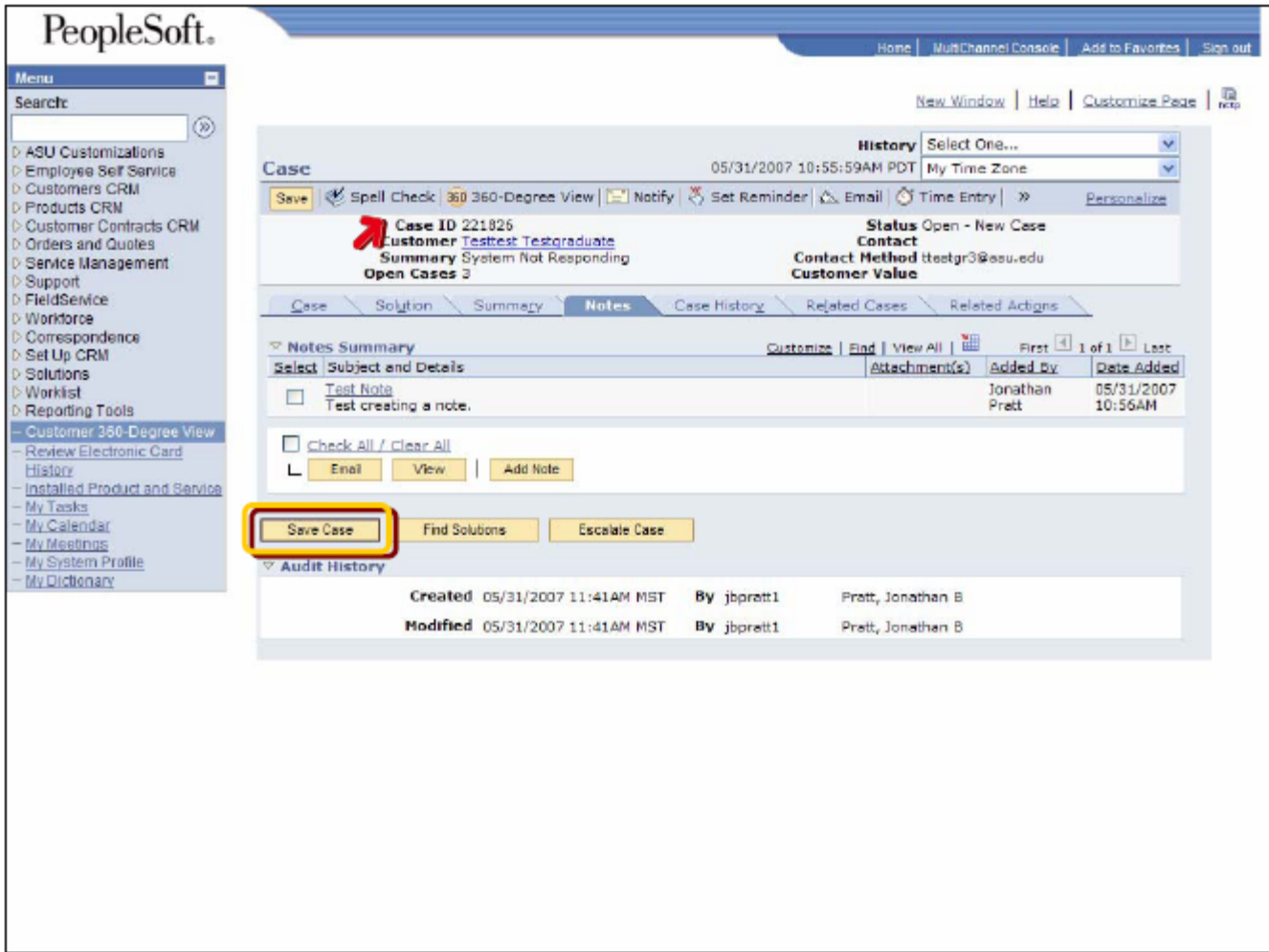


The screenshot displays the PeopleSoft CRM interface. On the left is a navigation menu with options like 'ASU Customizations', 'Employee Self Service', 'Customers CRM', 'Products CRM', 'Customer Contracts CRM', 'Orders and Quotes', 'Service Management', 'Support', 'FieldService', 'Workforce', 'Correspondence', 'Set Up CRM', 'Solutions', 'Worklist', and 'Reporting Tools'. The 'Customer 360-Degree View' is selected. The main area shows a case record for 'Testtest Testgraduate' with status 'Open - New Case'. The 'Notes' tab is active, showing a 'Notes Summary' section with a table of notes. A red arrow points to the 'Add Note' button, which is highlighted with a yellow box. Below the notes section are buttons for 'Save Case', 'Find Solutions', and 'Escalate Case'. An 'Audit History' section at the bottom shows the case was created and modified on 05/31/2007 by jopratt1.

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>	Test Note Test creating a note.		Jonathan Pratt	05/31/2007 10:56AM

Audit History			
Created	05/31/2007 11:41AM MST	By jopratt1	Pratt, Jonathan B
Modified	05/31/2007 11:41AM MST	By jopratt1	Pratt, Jonathan B

Note: The note that was just created is displayed under the Notes Summary section. To record another interaction before saving the case, click the Add Note button.



The screenshot shows the PeopleSoft CRM interface. On the left is a navigation menu with options like 'ASU Customizations', 'Employee Self Service', 'Customers CRM', 'Products CRM', 'Customer Contracts CRM', 'Orders and Quotes', 'Service Management', 'Support', 'FieldService', 'Workforce', 'Correspondence', 'Set Up CRM', 'Solutions', 'Worklist', 'Reporting Tools', and 'Customer 360-Degree View'. The main area displays a case record for Case ID 221825, Customer Testtest Testgraduate, with the summary 'System Not Responding'. The status is 'Open - New Case', contact is 'testgr3@asu.edu', and customer value is present. Below the case details is a 'Notes' section with a table showing a note added by Jonathan Pratt on 05/31/2007. At the bottom, there is an 'Audit History' section showing the case was created and modified on 05/31/2007 by jbprrt1. The 'Save Case' button is highlighted with a red box.

At this point, the case is ready to save. If not already resolved on the first contact with the customer, saving the case will start the case resolution process.

Step	Action
20	Click the Save Case button to save the case.

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

PeopleSoft®

Home | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | help

Menu

Search:

- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View
 - Review Electronic Card
 - History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My System Profile
 - My Dictionary

Case

05/31/2007 10:55:59AM PDT My Time Zone

Save Spell Check 360 360-Degree View Notify Set Reminder Email Time Entry Personalize

Case ID 221825 Customer [Testtest Testgraduate](#) Status Open - New Case

Summary System Not Responding Contact Method [ttestgr3@asu.edu](#) Contact Method Customer Value

Open Cases 3

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

Notes Summary Customize Find View All First 1 of 1 Last

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>	Test Note Test creating a note.		Jonathan Pratt	05/31/2007 10:56AM

☐ Check All / Clear All

Email View Add Note

Save Case Find Solutions Escalate Case

Audit History

Created	By	Pratt, Jonathan B
05/31/2007 11:41AM MST	jbpratt1	
Modified	By	Pratt, Jonathan B
05/31/2007 11:41AM MST	jbpratt1	

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

PeopleSoft®

Home | MultiChannel Console | Add to Favorites | Sign out

Menu

Search:

- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View
- Review Electronic Card
- History
- Installed Product and Service
- My Tasks
- My Calendar
- My Meetings
- My System Profile
- My Dictionary

New Window | Help | Custom

Case ID 221826
Customer Testtest Testgraduate
Summary System Not Responding
Open Cases 3

Status Open - New Case
Contact
Contact Method ttestgr3@asu.edu
Customer Value

Case Information

Main

*Status Open - New Case

Provider Group WPC T.A.C.

Assigned To

IP Address

MAC Address

Priority Low

Severity

Notes Summary

Select	Description	Attachment(s)	Type	Date Added	Added By
<input type="checkbox"/>	Test Note Test creating a note.	(Internal Only)		05/31/2007 10:36AM PDT	Pratt, Jonathan B

Attempted Solutions

There are no attempted solutions for this Case

Interactions

Date/Time Created	Type	Channel	Contact Name	Subject/Description	Created By
05/31/2007 10:37AM	Inbound	Phone	Testtest Testgraduate	Added Case No. 221826	Jonathan Pratt

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. If the case has been assigned to another provider group, send an Auto-Notification to the assigned Provider Group.

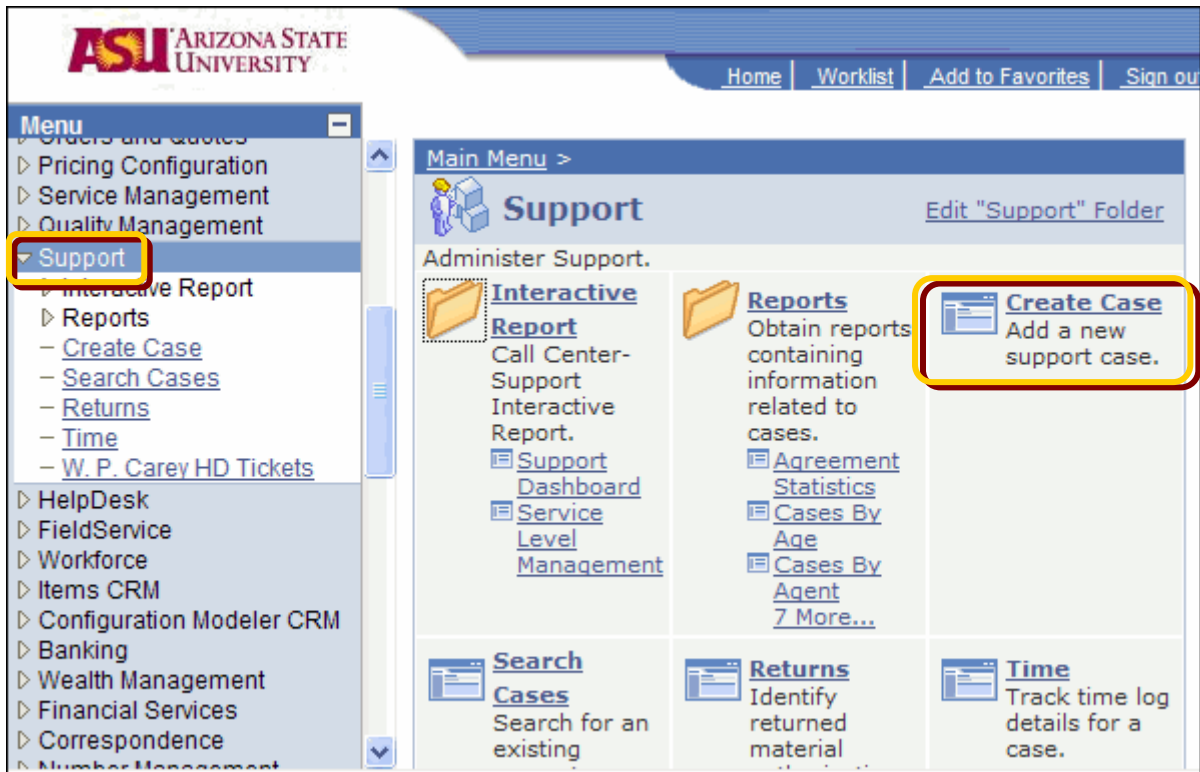


Create a Case: Support View

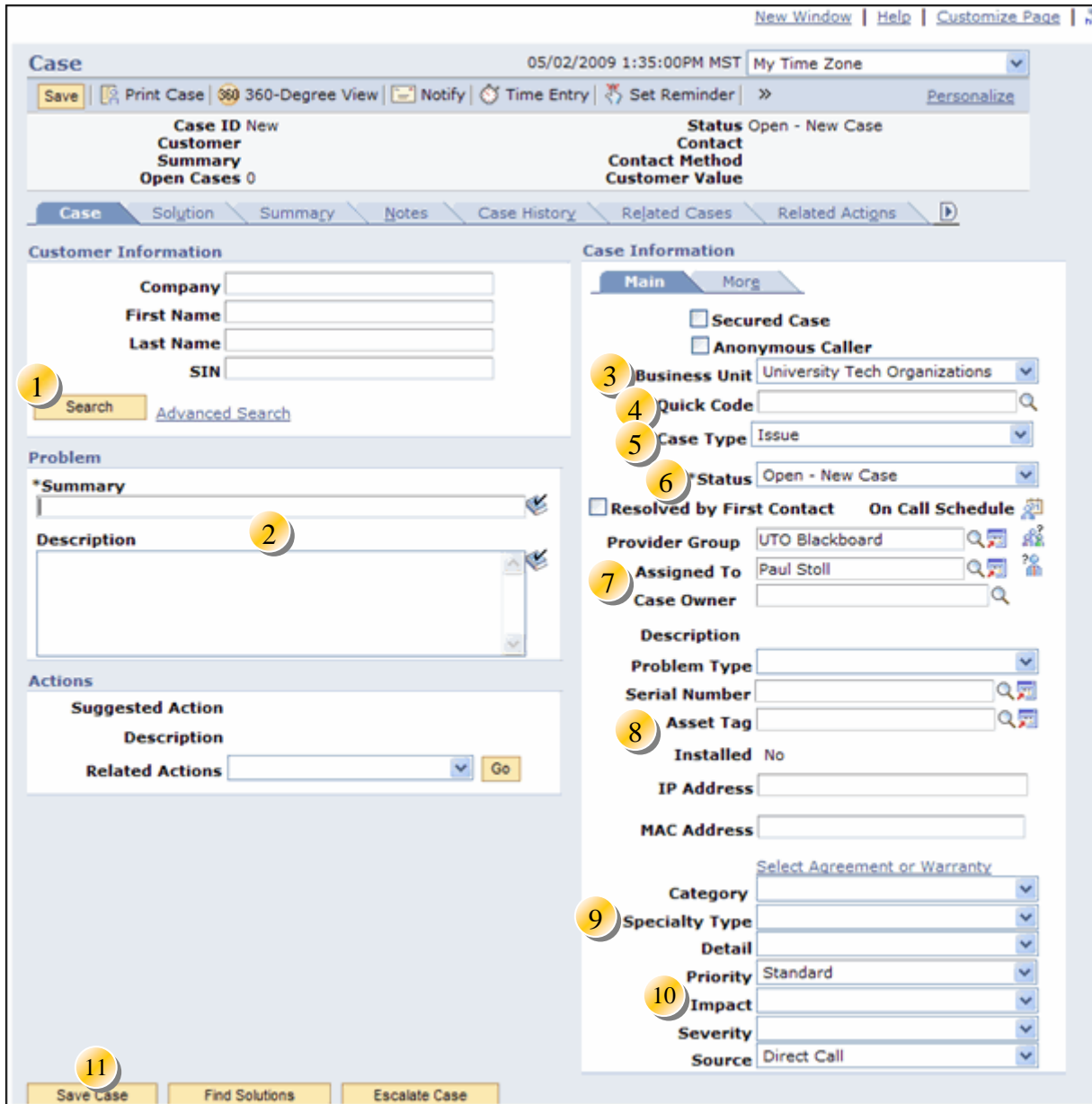
You have the most control over a case by using the support view. You can create a case in the support view.

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 ASU support case creation interface. The interface is divided into two main panels: **Customer Information** on the left and **Case Information** on the right. The **Customer Information** panel includes fields for Company, First Name, Last Name, and SIN, with a **Search** button. The **Case Information** panel includes fields for Business Unit, Quick Code, Case Type, Status, Resolved by First Contact, On Call Schedule, Provider Group, Assigned To, Case Owner, Description, Problem Type, Serial Number, Asset Tag, Installed, IP Address, MAC Address, Category, Specialty Type, Detail, Priority, Impact, Severity, and Source. There are also buttons for **Save Case**, **Find Solutions**, and **Escalate Case** at the bottom. Numbered callouts (1-11) point to specific fields and buttons.

- 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.

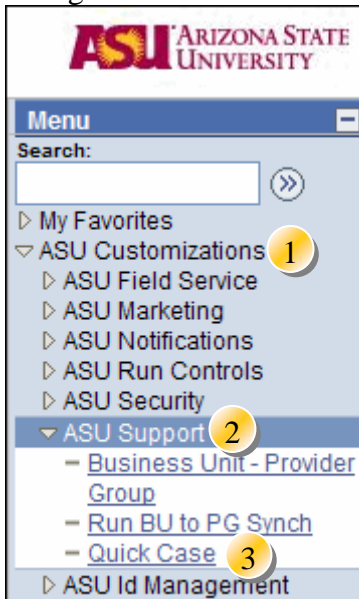


Create a Case: Quick Case View

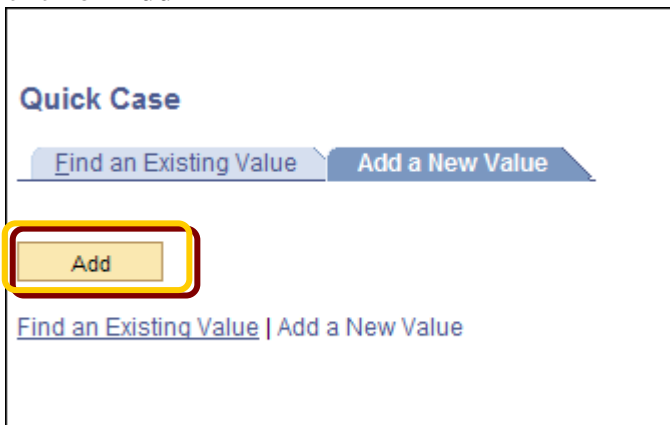
The support view gives you the most control over your case, but the creation takes a few seconds of processing (10-30 seconds). There is a quick way to create a new case called Quick Case.

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 text field
- 3: Customer Name text field
- 4: Contact Details text field
- 5: *Provider Group ID text field with a magnifying glass icon
- 6: Business Unit text field
- 7: Assigned To text field with a magnifying glass icon
- 8: Case Type dropdown menu
- 9: Case Priority dropdown menu
- 10: *Source dropdown menu (set to 'Direct Call')
- 11: Category dropdown menu
- 12: Specialty Type dropdown menu
- 13: Detail dropdown menu
- 14: *Problem Summary text field
- 15: Problem Description text area
- 16: Save button
- 17: Add button

- 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 **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**

[Email note to case](#)
[Email solution to close case](#)
Case Summary

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.

Create a Case: Email (ERMS)

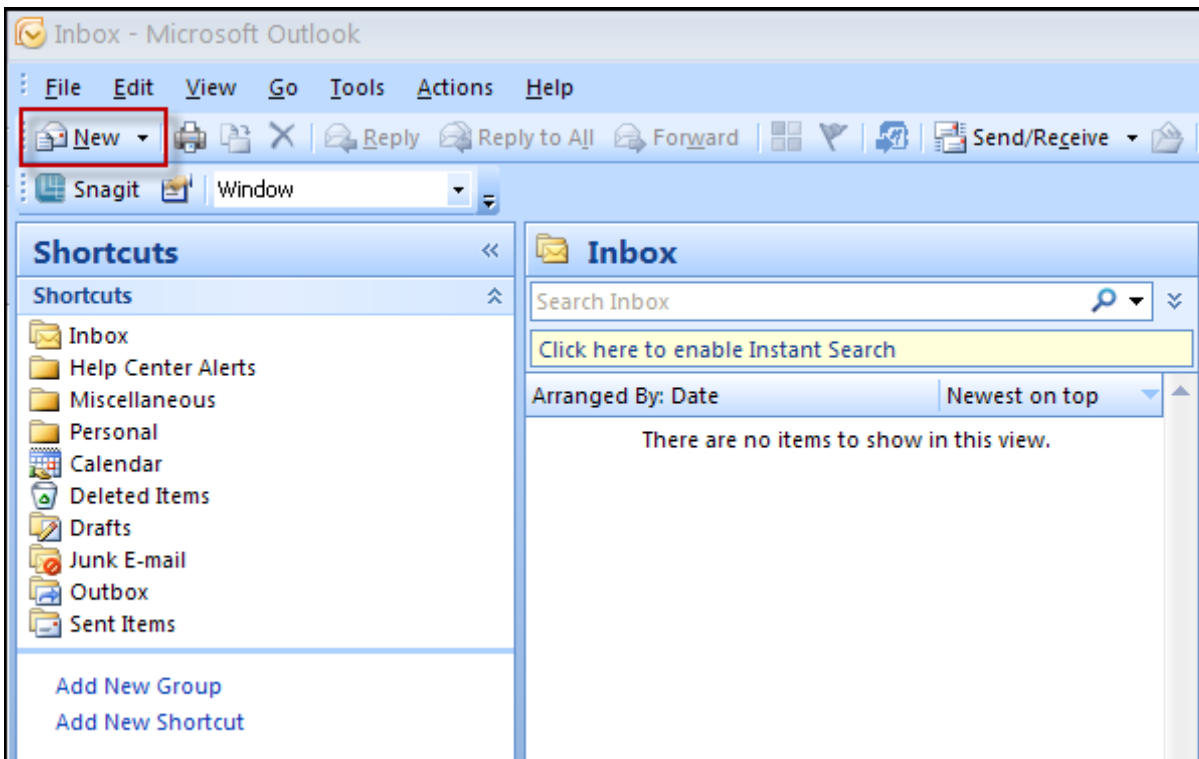
Benefits

All inbound email sent to the email address used by an ERMS (Email Response Management System) mailbox will automatically generate a case in CRM. This simplifies the case creation process for your customers. When it is configured;

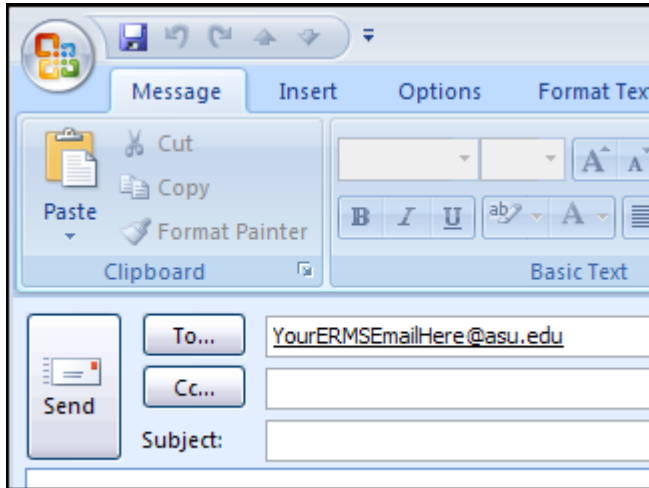
- Customers will receive an email notification that provides the case number.
- They can include 1MB attachment in the email which is then added to the notes section on case.
- Your provider group is notified that a new case has been created and assigned to them.

Details of the Process

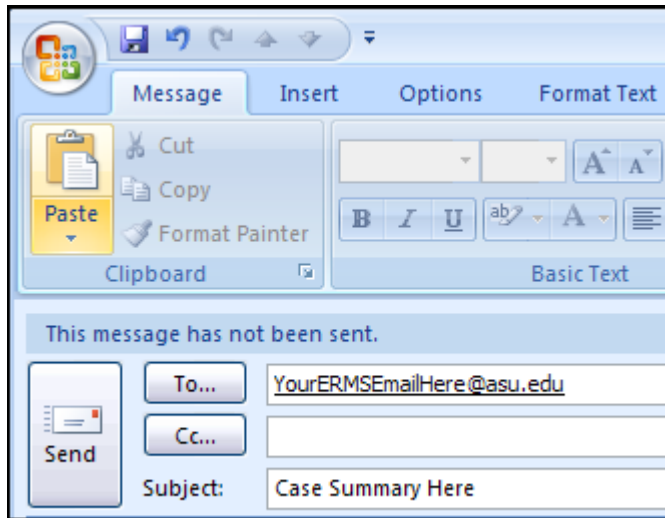
The sender's email address is identified in CRM to create the case using the sender as the customer. The email subject line will become the case summary and the body the case description. Customers are provided the case number, contact information for your support area or how they can check their case status using self-service. As an agent, you can create a case on behalf of your customer:



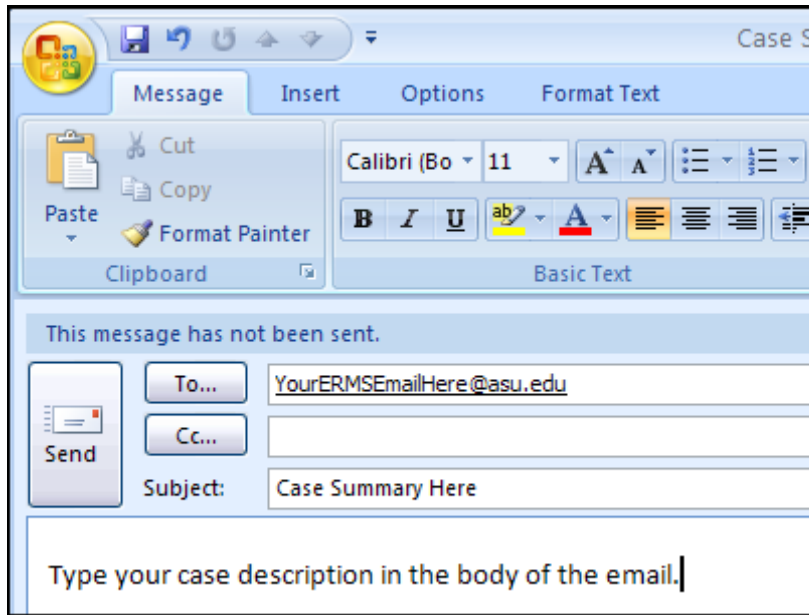
Step	Action
1	Open your email client and begin a new message.



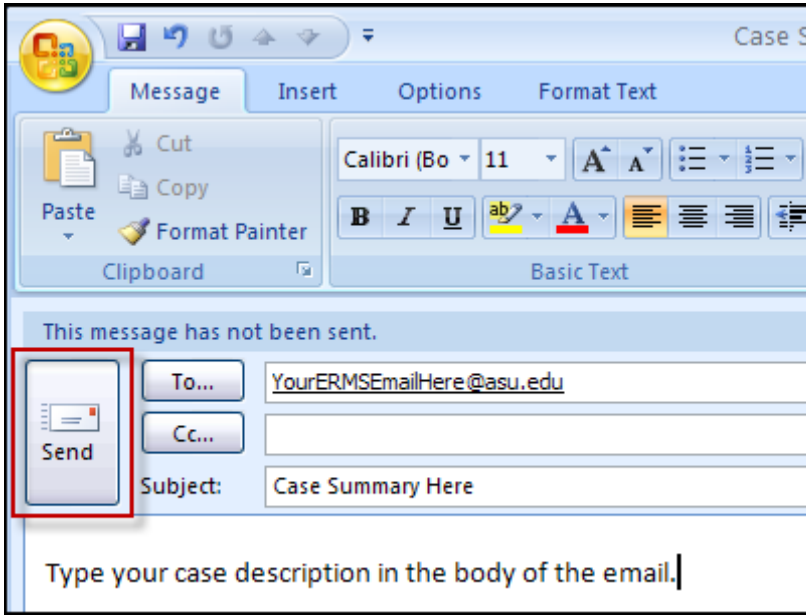
Step	Action
2	In the To field, type your provider group's ERMS email address. (If you don't know this, ask your provider group for the address.)



Step	Action
3	In the Subject field, type what you want to appear as the case summary



Step	Action
4	In the Body, type what you want to appear as the case description.



Step	Action
5	Send the email.

You will receive an email with the case number, contact information for the support area (provider group), and instructions on how to check the case status.

Some Nuances

There are several nuances to this feature:

- The email address must be dedicated for ERMS use only.
- All emails sent to the address will create a new case (including SPAM)
- All cases will be created as Issues, with a standard priority as the default.
- All cases will be assigned to your provider group, but not to any one individual.
- If attachment is larger than 1MB, a case is created but the customer is notified to compress the attachment and use CRMAddNote@asu.edu to update their case.
- Unknown email addresses in CRM will default a case to General Customer however the sender's email address is included in the case description for customer identification.
- The case is created by the ERMS process id.



Update a Case

Once a case is created, there are several things you can do to update the case. You can:

- Add notes to a case (about significant progress or activity)
- Email the customer
- Transfer the case to another agent or provider group

This section will show you how to do the above actions.



Update a Case: 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.



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.

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

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 UTOBLKBRD

Case Status: begins with OPEN

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

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	404512	UTOBLKBRD	Summary of case	OPEN
UTO00	407270	UTOBLKBRD	CEM administrative list	OPEN
UTO00	407410	UTOBLKBRD	Blackbear shell: 2019Summer8wk-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

Open - New Case

▼

*Customer ASURite ID

pstoll

Customer Name

Paul Stoll

Contact Details

480/415-4562

*Provider Group ID

UTOBLKBRD

UTO Blackboard

Assigned To

Paul Stoll



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

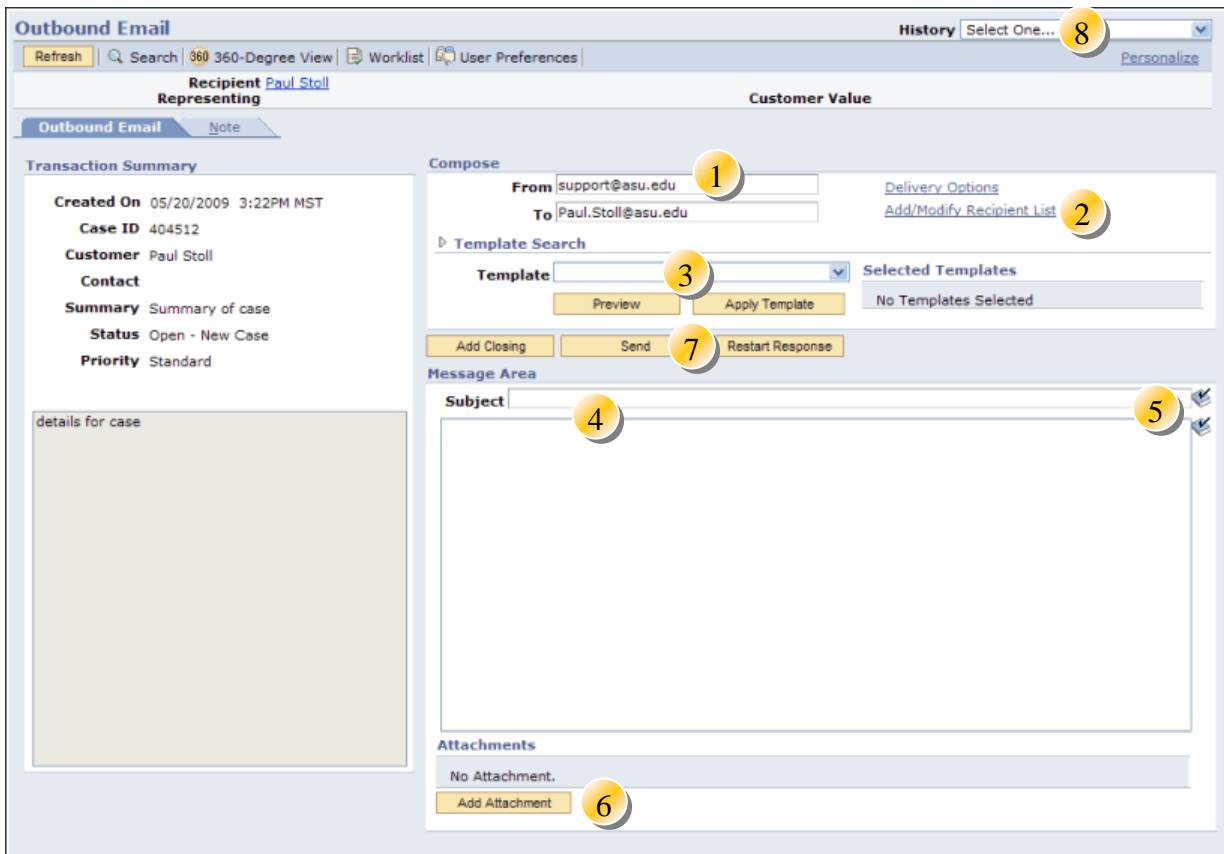
Notes Summary

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.



The screenshot shows the 'Outbound Email' interface. At the top, there's a navigation bar with 'Refresh', 'Search', '360-Degree View', 'Worklist', and 'User Preferences'. A 'History' dropdown is set to 'Select One...'. Below this, the 'Recipient' is 'Paul Stoll' and the 'Customer Value' is displayed. The main area is divided into a 'Transaction Summary' on the left and a 'Compose' section on the right. The 'Transaction Summary' includes details like 'Created On', 'Case ID', 'Customer', 'Contact', 'Summary', 'Status', and 'Priority'. The 'Compose' section has fields for 'From' (support@asu.edu), 'To' (Paul.Stoll@asu.edu), and a 'Template' dropdown. There are buttons for 'Preview', 'Apply Template', 'Add Closing', 'Send', and 'Restart Response'. A 'Message Area' with a 'Subject' field and a large text box is below. An 'Attachments' section at the bottom has a 'No Attachment' message and an 'Add Attachment' button. Numbered callouts (1-8) point to specific elements: 1. From field, 2. Add/Modify Recipient List link, 3. Template dropdown, 4. Subject field, 5. Spell check icons, 6. Add Attachment button, 7. Send button, and 8. History dropdown.

1. The default “From” address is [Support@asu.edu](mailto: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 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/Closing Cases

In CRM Solving and Closing a case are the same action. The entire reason to use CRM is to track how and when you have solved a customer's problem.

This section will show you how to solve (close) cases using:

- The support view
- Email



Solve/Close 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

5 Save Case 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

Save

Print Case

360 360-Degree View

Email

Notify

Time Entry

Set Reminder

>> Personalize

Case ID 404512

Customer [Paul Stoll](#)

Summary Summary of case

Open Cases 5

Status Open - New Case

Contact

Contact Method 480/415-4562

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

L

Email

View

Solve

Enter New Solution

Attempt

Solve

Save Case

Escalate Case

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/Close a Case: Quick View/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.

The screenshot shows an email composition window. The 'To...' field contains 'CRMClose;'. The 'Cc...' field is empty and highlighted with a red box. The 'Subject:' field contains '226165#' and is also highlighted with a red box. The email body contains the text: 'This is the solution to the case. It will be put in the case and sent to the customer.'

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.



Tips and Tricks

This section has miscellaneous topics relevant to using CRM as an agent.



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:

The screenshot shows the CRM Case view for Case ID 404512. The top navigation bar includes buttons for Save, Print Case, 360-Degree View, Email (highlighted with a red box), Notify, Time Entry, Set Reminder, and Personalize. The case details section shows the Customer as Paul Stoll, Status as Open - New Case, and Contact Method as 480/415-4562. The left sidebar contains tabs for Case, Solution, Summary, Notes, Case History, Related Cases, and Related Actions. The main content area is divided into Problem and Case Information sections. The Problem section has fields for Summary and Description. The Case Information section has fields for Business Unit, Quick Code, Status, Provider Group, Assigned To, Case Owner, and IP Address. At the bottom, there are buttons for Email, View, and Add Note.

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

The screenshot shows the CRM Outbound Email view. The top navigation bar includes buttons for Refresh, Search, 360-Degree View, Worklist, User Preferences (highlighted with a red box), and Personalize. The case details section shows the Recipient as Paul Stoll, Customer Value, and Status as Open - New Case. The left sidebar contains tabs for Outbound Email and Note. The main content area is divided into Transaction Summary and Compose sections. The Transaction Summary section shows the Created On date and time, Case ID, Customer, Contact, Summary, Status, and Priority. The Compose section has fields for From, To, Template, and Subject. At the bottom, there are buttons for Add Closing, Send, and Restart Response.

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


OK Cancel Restore to System Defaults

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

Viewing On-Call Information

PeopleSoft®

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | 

Menu

Search:

- My Favorites
- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View**
 - Review Electronic Card
 - History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My Personalizations
 - My System Profile
 - My Dictionary

Case ID 222818
Customer [Testtest Testorgraduate](#)
Summary Test: Laptop Issues
Open Cases 1

Status Open - New Case
Contact
Contact Method
Customer Value

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

Problem


*Summary
Test: Laptop Issues

Description
Laptop won't shut down

Case Information

Main / More

*Status Open - New Case

Provider Group WPC T.A.C. 

Assigned To


IP Address

MAC Address

Priority Low


Severity

Notes Summary

Customize | Find | View All |  First 1 of 1 Last

Select	Description	Attachment (s)	Type	Date Added	Added By
<input type="checkbox"/>	Customer called for solution advice Customer called for derification on using Control + Alt + Delete to solve laptop problem.		(Internal Only)	06/07/2007 2:32PM PDT	Pratt, Jonathan B

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"/>	303702	Try to press Ctrl + Alt + Delete and Restart the computer	06/07/2007 2:05:02PM PDT	Reisslein, Jana	In Consideration

Step	Action
1	Click on the On Call Schedule icon to view the On Call information of a provider group assigned to a case.

PeopleSoft®

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page |

Menu

Search:

- My Favorites
- ASU Customizations
- Employee Self Service
- Customers CRM
- Products CRM
- Customer Contracts CRM
- Orders and Quotes
- Service Management
- Support
- FieldService
- Workforce
- Correspondence
- Set Up CRM
- Solutions
- Worklist
- Reporting Tools
- Customer 360-Degree View**
 - Review Electronic Card History
 - Installed Product and Service
 - My Tasks
 - My Calendar
 - My Meetings
 - My Personalizations
 - My System Profile
 - My Dictionary

Show People On Call

Provider Group ID: WPCTAC

Primary Contact Info	Backup Contact Info	Manager Contact Info
Name	Name	Name
Primary Phone	Primary Phone	Primary Phone
Secondary Phone	Secondary Phone	Secondary Phone
Email Address	Email Address	Email Address

OK Cancel

Step	Action
2	The Provider Group contact information (name, phone, email) displays.