INFORMATION TECHNOLOGY SERVICES

CRM Agent Training

Creating a Case

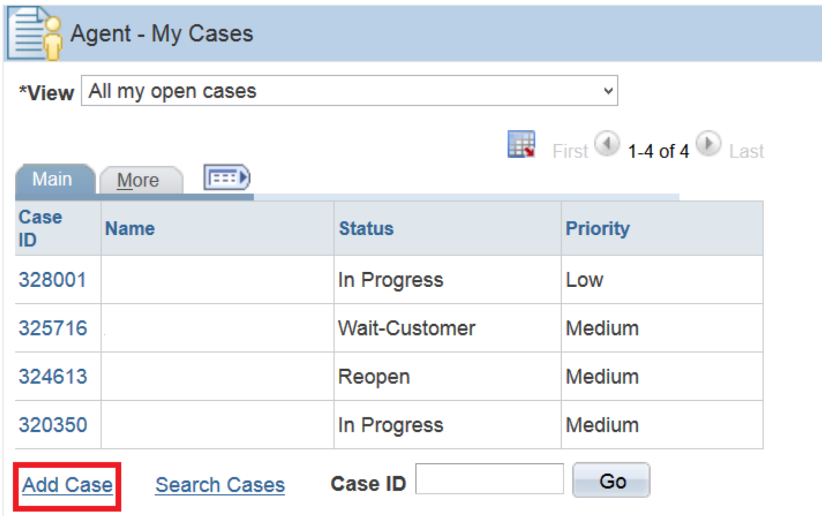
Service Management Deployment

February 4, 2015

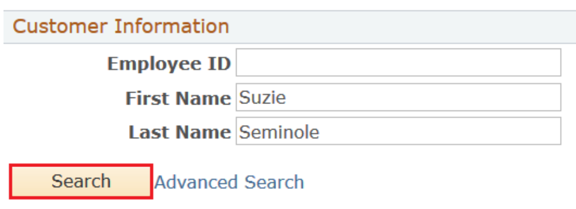
Overview

This Job Aid includes step-by-step instructions for creating a case in the FSU Service Center (CRM).

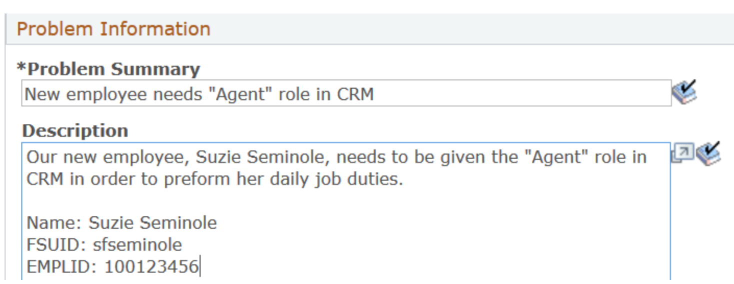
1. Log in to http://servicecenter.fsu.edu/
2. In the Agent – My Cases pagelet, Select **Add Case**.



3. To populate the **Customer Information** field search by a customer's first name, last name, and/or employee ID.

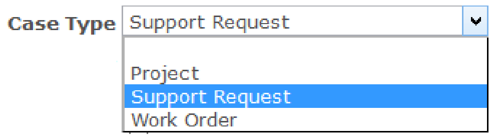


4. Populate the **Problem Information** with a summary and a detailed description of the problem.



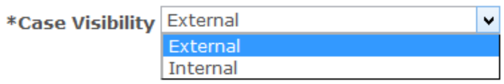
5. Populate the **Case Information** section.
   a. Case Type

   The default for Case Type is **Support Request**. An agent can change the type to reflect the type of case that has been submitted. The current options for this field are:



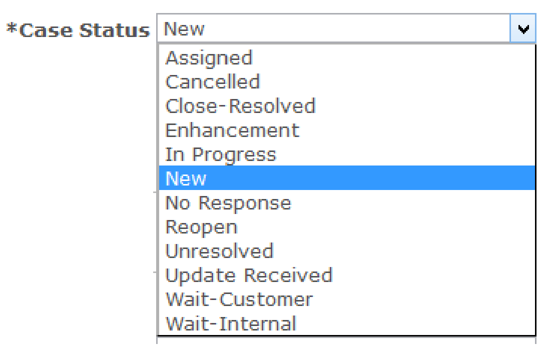
b. Case Visibility

The default for Case Visibility is **External**. Cases should remain with an External visibility unless the case description and/or notes contain sensitive information. The current options for this field are:



c. Case Status

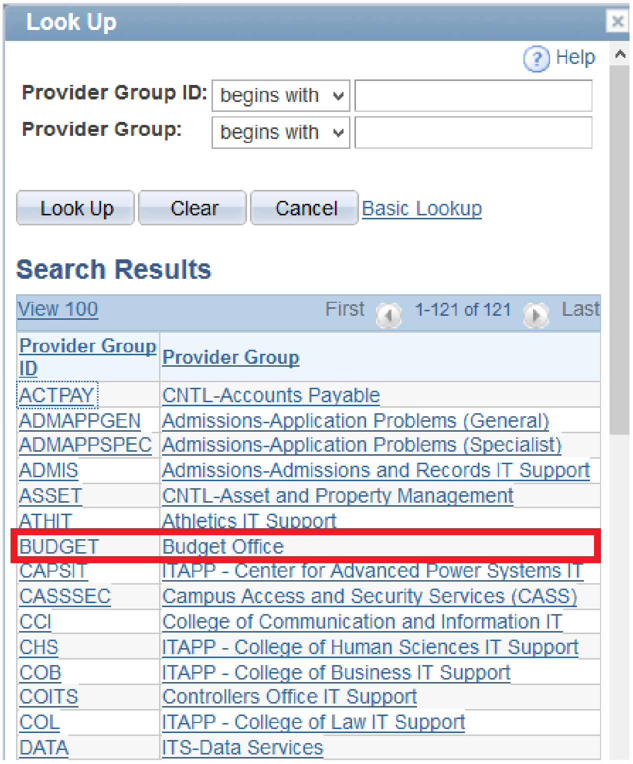
The Case Status field changes automatically based on actions taken within the case. As an example, when a case has been submitted to a particular provider group the case status will show **New** until that case is assigned to an agent. Once the case has been assigned to an agent, the status will change to **In Progress**. Agents can change this field to **Wait-Customer** if the agent has requested additional information and they are waiting for the customer to update the case. The current options for this field are:



d. Provider Group

To select which provider group a case will be routed to, click on the magnifying glass to the right of the provider group field.

Selecting the magnifying glass will open a window with a list of all provider groups within the system. To populate the Provider Group field, simply select a provider group from this list.



Look Up

Help

Provider Group ID: begins with

Provider Group: begins with

Look Up | Clear | Cancel | Basic Lookup

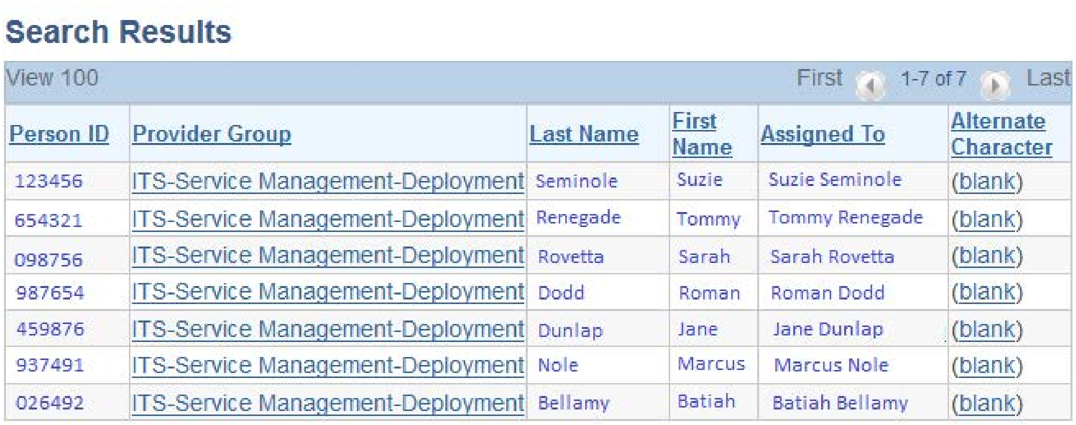
Search Results

View 100 — First 1-121 of 121 Last

Provider Group ID	Provider Group
ACTPAY	CNTL-Accounts Payable
ADMAPPGEN	Admissions-Application Problems (General)
ADMAPPSPEC	Admissions-Application Problems (Specialist)
ADMIS	Admissions-Admissions and Records IT Support
ASSET	CNTL-Asset and Property Management
ATHIT	Athletics IT Support
BUDGET	Budget Office
CAPSIT	ITAPP - Center for Advanced Power Systems IT
CASSSEC	Campus Access and Security Services (CASS)
CCI	College of Communication and Information IT
CHS	ITAPP - College of Human Sciences IT Support
COB	ITAPP - College of Business IT Support
COITS	Controllers Office IT Support
COL	ITAPP - College of Law IT Support
DATA	ITS-Data Services

e. Assigned To

Once the provider group has been selected, agents are able to assign a case to a particular agent in the selected provider group. To do this, click on the magnifying glass to the right of the Assigned To field. This will open a window with a list of agents in that provider group. Select an agent, and your case will be assigned to that agent.



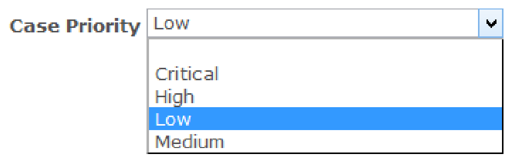
Search Results

View 100 — First 1-7 of 7 Last

Person ID	Provider Group	Last Name	First Name	Assigned To	Alternate Character
123456	ITS-Service Management-Deployment	Seminole	Suzie	Suzie Seminole	(blank)
654321	ITS-Service Management-Deployment	Renegade	Tommy	Tommy Renegade	(blank)
098756	ITS-Service Management-Deployment	Rovetta	Sarah	Sarah Rovetta	(blank)
987654	ITS-Service Management-Deployment	Dodd	Roman	Roman Dodd	(blank)
459876	ITS-Service Management-Deployment	Dunlap	Jane	Jane Dunlap	(blank)
937491	ITS-Service Management-Deployment	Nole	Marcus	Marcus Nole	(blank)
026492	ITS-Service Management-Deployment	Bellamy	Batiah	Batiah Bellamy	(blank)

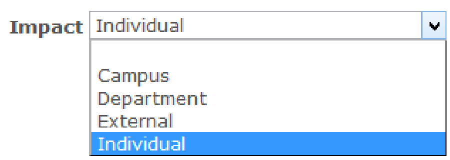
f. Case Priority

By using this field, agents are able to select the severity of the case. The default case priority is **Low**. The options for this field are:



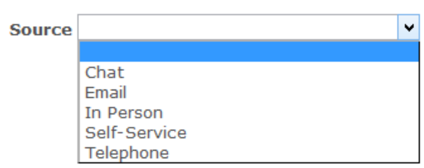
g. Impact

The Impact field allows agents to show what population this case affects. The options for this field are:



e. Source

Select the source of the case information being entered



6. Select **Save Case**