INFORMATION TECHNOLOGY SERVICES

CRM Agent Training

Adding and Emailing a Note

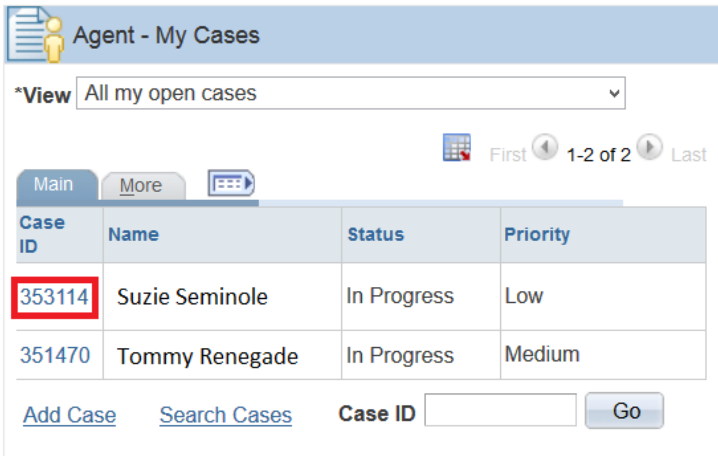
Service Management Deployment

February 4, 2015

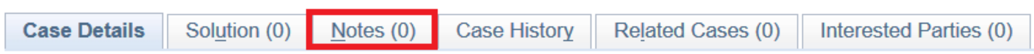
Overview

This Job Aid includes step-by-step instructions for adding and emailing a note in the FSU Service Center (CRM).

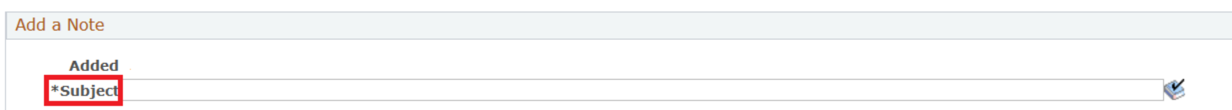
1. Log in to servicecenter.fsu.edu
2. Select the case you would like to work with by clicking the Case ID number in the **Agent- My Cases** box



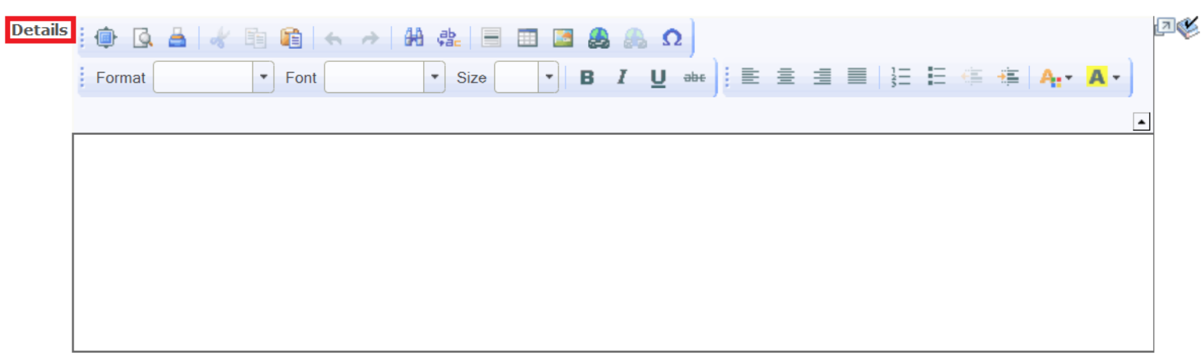
3. Select the **Notes** tab on the Case Details ribbon



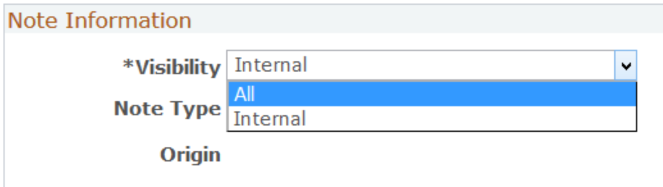
4. Populate the **Subject** field. *Note: If the subject field is not populated, the first sentence from the Details section will auto fill as the subject



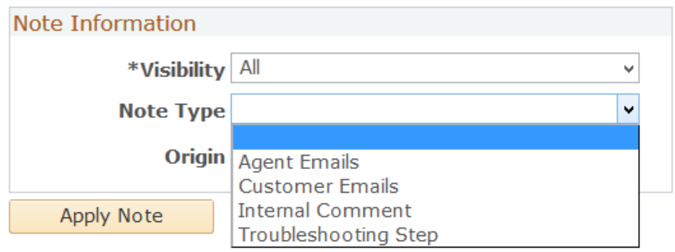
5. Populate the **Details** field



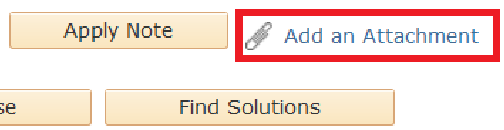
6. In the **Note Information** box, select from the **Visibility** drop down. Selecting **All** allows all users to view the note. Selecting **Internal** makes the note viewable only by agents



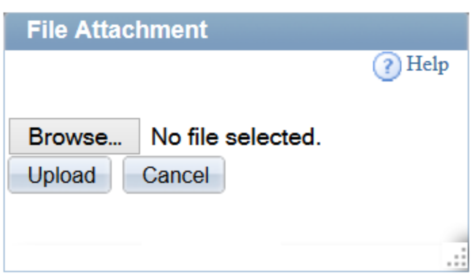
7. In the **Note Information** box, select from the **Note Type** drop down. This section provides information regarding the nature of the note



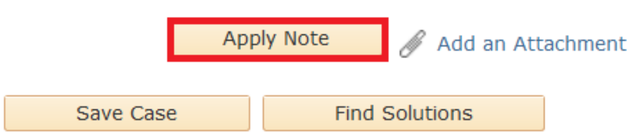
8. To add an attachment to your note, click the **Add an Attachment** link at the bottom of the **Notes** tab



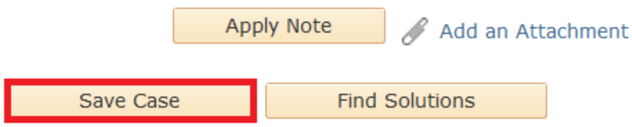
9. Selecting the **Add an Attachment** link will cause the **File Attachment** box to open. From this box, you can browse files to add to the note



10. Select **Apply Note**

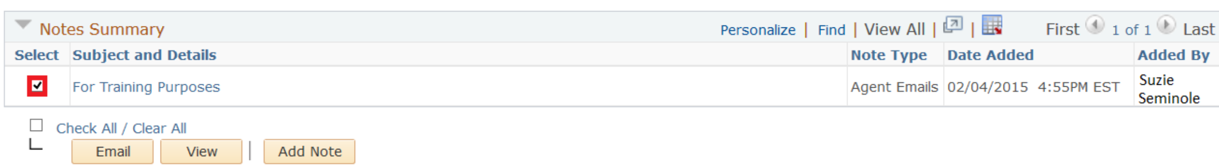


11. Select **Save Case**

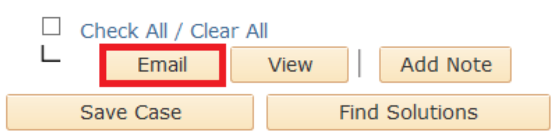


12. When the Note has been saved, the following screen will appear

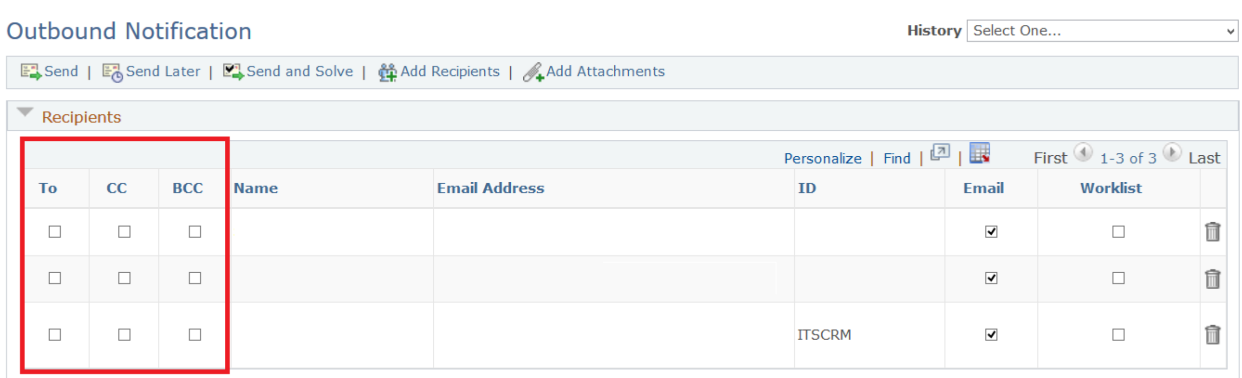
13. Select the Note you would like to email



14. Select **Email**



*The **Outbound Notification** screen will open. The Customer, Agent working the case, any Interested Parties, and the Provider Group email will populate as possible recipients. Select the recipients you would like to send the note to.



15. Select **Send**