



INFORMATION TECHNOLOGY SERVICES

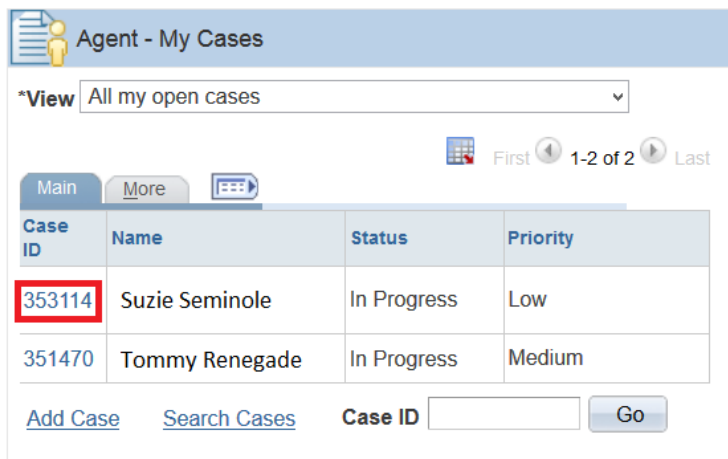
CRM Agent Training Adding and Emailing a Note

Service Management Deployment
February 4, 2015

Overview

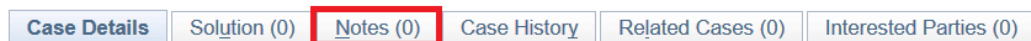
This Job Aid includes step-by-step instructions for adding and emailing a note in the FSU Service Center (CRM).

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



Case ID	Name	Status	Priority
353114	Suzie Seminole	In Progress	Low
351470	Tommy Renegade	In Progress	Medium

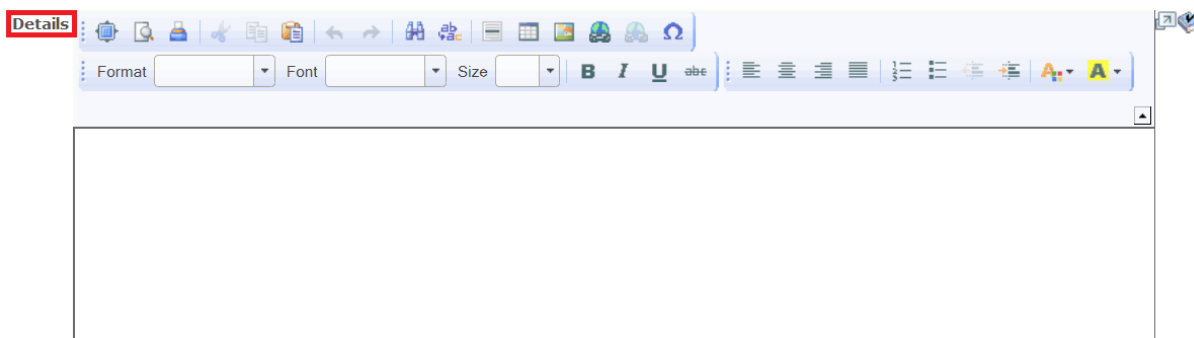
3. Select the **Notes** tab on the Case Details ribbon



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

The screenshot shows a 'Note Information' box with the following fields:

- *Visibility: A dropdown menu with 'Internal' selected and 'All' highlighted in blue.
- Note Type: A dropdown menu with 'Internal' selected.
- Origin: A text input field.

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

The screenshot shows the 'Note Information' box with:

- *Visibility: A dropdown menu with 'All' selected.
- Note Type: A dropdown menu with 'Agent Emails' selected and highlighted in blue.
- Origin: A text input field.
- An 'Apply Note' button is visible at the bottom left.

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

The screenshot shows a row of buttons: 'Apply Note', 'Add an Attachment' (with a paperclip icon and highlighted by a red box), 'Save Case', and 'Find Solutions'.

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

The 'File Attachment' dialog box contains:

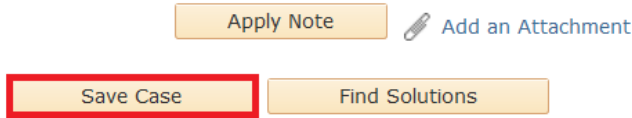
- A 'Browse...' button.
- The text 'No file selected.'
- 'Upload' and 'Cancel' buttons.
- A 'Help' link with a question mark icon.

10. Select **Apply Note**

The screenshot shows the same row of buttons as in step 8: 'Apply Note' (highlighted with a red box), 'Add an Attachment', 'Save Case', and 'Find Solutions'.



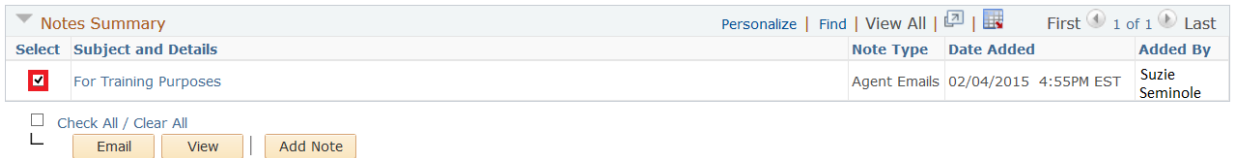
11. Select **Save Case**



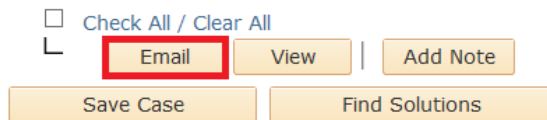
12. When the Note has been saved, the following screen will appear



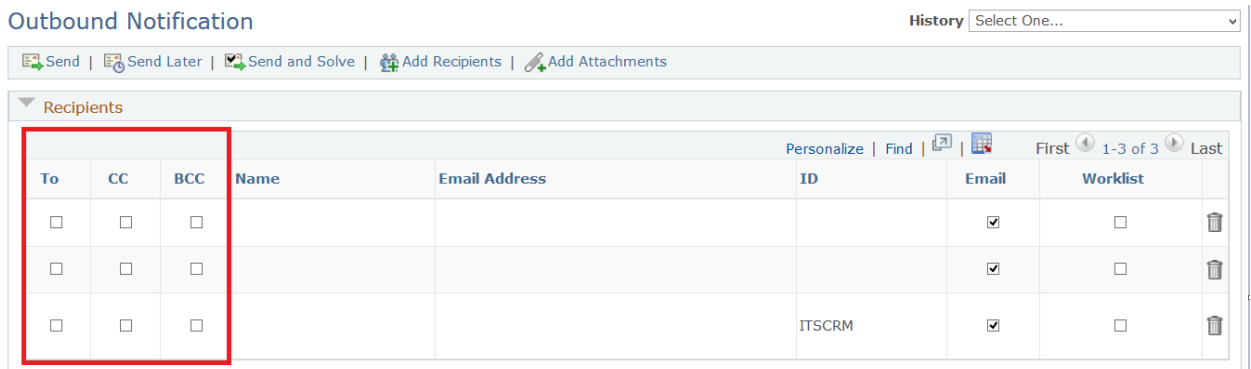
13. Select the Note you would like to email



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**

