



# INFORMATION TECHNOLOGY SERVICES

## **CRM Agent Training** Assigning an agent to a case

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Service Management Deployment

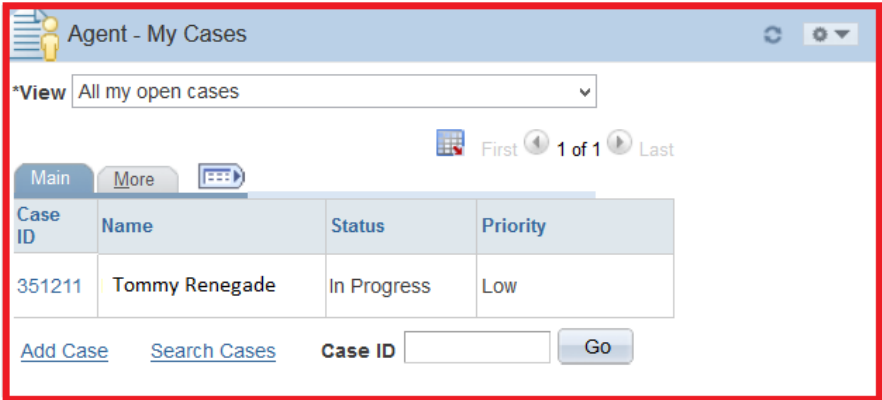
April 13, 2015

# Overview

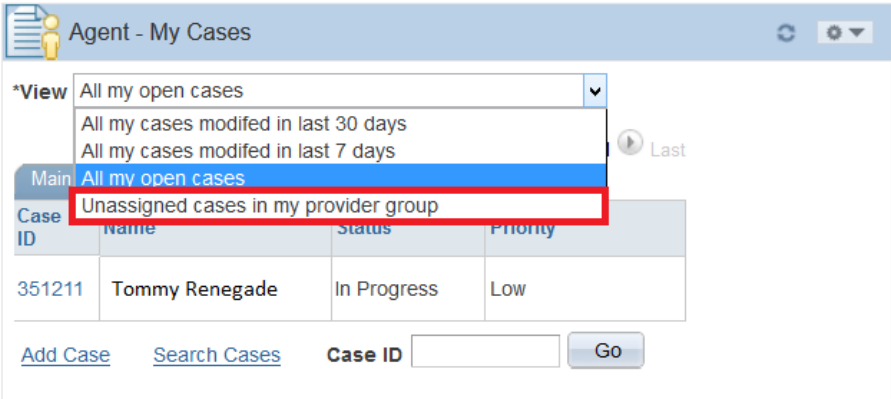
A step-by-step guide explaining how to assign a new case to an agent.

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- 1. Log in to servicecenter.fsu.edu.
- 2. Navigate to the Agent - My Cases pagelet.



- 3. Select the **\*View** dropdown. Select **Unassigned cases in my provider group**.



- 4. A list of cases will open. To open an unassigned case, select the case number.



5. When the case page has opened, navigate to the **Case Information** box

Case Information

Main
More

Secured Case  
 Anonymous Caller

Quick Code

Case Type

\*Case Visibility

\*Case Status

Resolved by First Contact

Provider Group

Assigned To

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Category

Specialty Type

Detail

Case Priority

Impact

Source

6. To assign an agent to this case, first select the provider group that agent belongs to by clicking the search icon to the right of the **Provider Group** field.

Case Information

Main
More

Secured Case  
 Anonymous Caller

Quick Code

Case Type

\*Case Visibility

\*Case Status

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Source



## 7. Select the appropriate provider group.

? Help

**Provider Group ID:** begins with

**Provider Group:** begins with

[Basic Lookup](#)

### Search Results

View 100
First 1-123 of 123 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)
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
DODD	College of Arts and Sciences IT Support
DOF	Faculty Development and Advancement
DSA	Division of Student Affairs
ERP-CSBA	ERP-CSBA
ERPOD	ERP-OMNI Default
ERPOF	ERP-OMNI Financials
ERPOHR	ERP-OMNI HR
ERPOR	ERP-OMNI Reports
ERPUPK	ERP-UPK Job Aids
FAACCT	Financial Aid Accounting
FAATHLETIC	Financial Aid Athletics
FACBA	Financial Aid Campus Based Aid
FADATA	Financial Aid Data Entry
FAHD	Financial Aid Help Desk
FAINTLOANS	Financial Aid Institutional Loans
FALOANS	Financial Aid Loans
FASHD	Financial Aid Supervisor Helpdesk
FASPECIAL	Financial Aid Special Programs
FASYSTEMS	Financial Aid Systems



8. Select the search icon to the right of the **Assigned To** field.

Case Information

Main More

Secured Case

Anonymous Caller

Quick Code

Case Type

\*Case Visibility

\*Case Status

Resolved by First Contact

Provider Group

Assigned To

---

Category

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Detail

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Source

9. Enter the agent's first and last name. Select **Look Up**.

Look Up Assigned To

[? Help](#)

Last Name:

First Name:

Assigned To:

Alternate Character:

[Basic Lookup](#)

Searching this table may take a long time. Enter values above before requesting Lookup.

10. Once the agent's name has been entered, select **Save Case**.

