



INFORMATION TECHNOLOGY SERVICES

CRM Agent Training Searching for a Case

Service Management Deployment

February 6, 2015

Overview

This Job Aid included step-by-step instructions for searching for cases in the FSU Service Center (CRM).

1. Log in to <http://servicecenter.fsu.edu>
2. In the **Agent – My Cases** pagelet, select **Search Cases**

Agent - My Cases

*View All my open cases

First 1-2 of 2 Last

Main More

Case ID	Name	Status	Priority
353270	Tommy Renegade	In Progress	Low
351470	Suzie Seminole	Reopen	Medium

Add Case Search Cases Case ID Go

3. Select search criteria, and click **Search**.

Search

Use Saved Search

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

*Business Unit = Florida State University

Case =

Name =

Contact =

ID =

Contact Phone begins with

Contact Email begins with

Case Status =

Case Priority =

Provider Group =

Assigned To =

Global Case =

Interested Party =

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

4. A new window will open displaying search results



5. For additional search criteria, select **Advanced Search**

Search

Use Saved Search

Search Clear **Advanced Search** Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

*Business Unit = Florida State University

Case =

Name =

Contact =

ID =

Contact Phone begins with

Contact Email begins with

Case Status =

Case Priority =

Provider Group =

Assigned To =

Global Case =

Interested Party =

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

6. If this search is repeated frequently, the search criteria selected can be saved for future use

Search

Use Saved Search

Search Clear Advanced Search **Save Search Criteria** Delete Saved Search Personalize Search

Case Sensitive

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Case =

Name =

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ID =

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Contact Email begins with

Case Status =

Case Priority =

Provider Group =

Assigned To =

Global Case =

Interested Party =

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive



7. To use a saved search, select **Use Saved Search**

Search

Use Saved Search

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

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Case Priority =

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Assigned To =

Global Case =

Interested Party =

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Case Sensitive

