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

3. A new window will open. Select search criteria, and click Search.
4. A new window will open displaying search results

5. For additional search criteria, select **Advanced Search**
6. If this search is repeated frequently, the search criteria selected can be saved for future use
7. To use a saved search, select **Use Saved Search**