



# INFORMATION TECHNOLOGY SERVICES

## CRM Agent Training Adding and Emailing a Solution

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Service Management Deployment

February 6, 2015

### **Overview**

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

1. Log in to [servicecenter.fsu.edu](http://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

Agent - My Cases

\*View All my open cases

Main More

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

Add Case Search Cases Case ID  Go

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

Case Details Solution (0) Notes (1) Case History Related Cases (0) Interested Parties (0)

4. Select **New Solution**

Search FAQ Frequently Used Solutions New Solution

Search Text

Search Advanced Search Search Tips Preferences Create New Solution

Save Case

5. Populate the **Details** field with an appropriate solution for the case.

New Solution

Details

Format Font Size B I U abe

Attempt Solve

Save Case



6. Select Solve. Then select **Save Case**.

The screenshot shows a 'New Solution' window with a toolbar and a large text area. At the bottom of the window, there are two buttons: 'Attempt' and 'Solve'. The 'Solve' button is highlighted with a red box. Below the window, there is a 'Save Case' button, also highlighted with a red box.

7. Select the solution that was entered, then select **Email**

Attempted Solutions Personalize | Find | View All | First 1 of 1 Last

Select	ID	Description	Date Modified	Added By	Resolution Status
<input checked="" type="checkbox"/>	434959	For Training Purposes For Training Purposes	02/06/2015 11:39:22AM EST	Suzie Seminole	Successful Resolution

Check All / Clear All

**Email**

8. A new window will open. Select recipients by checking the **To** box to the left of the recipient's name

Outbound Notification History Select One...

Recipients

To	CC	BCC	Name	Email Address	ID	Email	Worklist
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Suzie Seminole	sseminole@fsu.edu	12345678	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ITS-SERVICE MANAGEMENT- DEPLOYMENT	ITS-ServiceManagement-Deployment@fsu.edu	ITSCRM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tommy Renegade	trenegade@fsu.edu	87654321	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

9. Select **Send**

Outbound Notification History Select One...

