



INFORMATION TECHNOLOGY SERVICES

CRM Agent Training Reassigning a Case

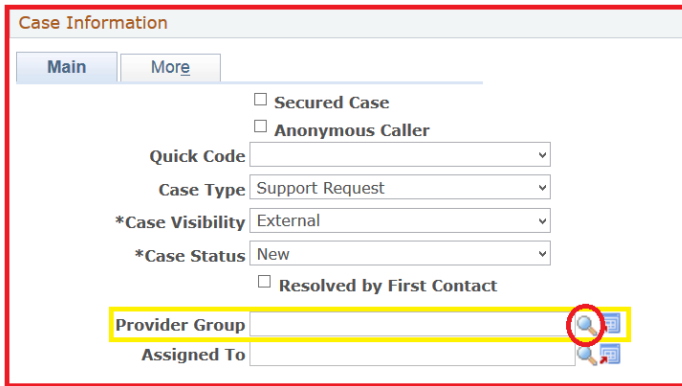
Service Management Deployment

February 6, 2015

Overview

Due to auto-routing based on customer selections, occasionally a case will be assigned to your Provider Group in error. If you do not know the correct group, Service Management recommends you add a note and reassign those cases to the ITS-Service Desk for appropriate routing.

1. From within a current case, navigate to the **Case Information** section and select the **Search icon** to the right of the **Provider Group** field.



The screenshot shows the 'Case Information' section of a software interface. It features a 'Main' tab and a 'More' tab. Below the tabs are several fields: 'Secured Case' (checkbox), 'Anonymous Caller' (checkbox), 'Quick Code' (dropdown), 'Case Type' (dropdown), '*Case Visibility' (dropdown), '*Case Status' (dropdown), and 'Resolved by First Contact' (checkbox). The 'Provider Group' field is highlighted with a yellow border, and a red circle highlights the search icon to its right. The 'Assigned To' field is visible below it.

2. Selecting the **Search icon** (see circle above) will trigger a new screen with a list of all active Provider Groups. Select the group you want the case assigned to or the **ITS-Service Desk**.

QUAL	Quality Assurance
REGCM	Registrar-Curriculum Management General
REGCMERP	Registrar-Curriculum Management ERP
REGCMSP	Registrar-Curriculum Management Specialist
REGIST	Registrar
SBSACCT	CNTL- SBS Accounting
SBSAR	CNTL- SBS AR
SBSBAS	CNTL- SBS Business Analyst Support
SBSBILL	CNTL- SBS Billings
SBSCASHIER	CNTL- SBS Cashiering
SBSCUST	CNTL- SBS Customer Service
SBSDISB	CNTL- SBS Disbursements
SBSPERK	CNTL- SBS Perkins
SBSTRAIN	CNTL- SBS Training & Special Projects
SERVICEDES	ITS-Service Desk
SRAS	Sponsored Research Accounting Services

3. You must **Save** your case to complete the action!

