myFSU Service Center Agent Quick Start Guide

Need help?
servicecenter.fsu.edu

Create a Case

1. On your Home page go to the **Cases.**
2. Click **New** at the top right.
3. Choose the **case type record** and click **Next.**
4. Add the consumer and case information.
5. If you plan to work the case, uncheck assign using active assignment and click **Save.**

Communicating with the Consumer

Add a Case Comment

1. Open case record from **My Cases.**
2. Under **Related** go to the **Case Comments** section and select **New.**
3. Enter comments for consumer in Body field.
4. To make comment viewable to consumer click **Public.**

Send an Email

1. Open case record.
2. Go to the **Chatter** section of the case.
3. On the **Email** tab, click in the “Write an email” field.
4. The To automatically includes the case Contact. The Bcc field automatically includes the agent email address. You can add attachments to the email.
5. Click **Send.** *Note:* If you need to wait for the consumer to reach out to close the case, update the case by clicking on **Waiting Consumer** and **Mark as Current Status** in the status bar.

Close a Case

1. Open case record.
2. Under **Details** go to the **Closing Information** section.
3. Click the pencil icon next to Case Resolution **Comments** and enter comments.
4. Enter the **Close Reason** by clicking **View all dependencies** under the **Close Reason** field.
5. An “Edit Dependencies” screen will populate. Select **Closed** as the **Status**. Next, enter the **Close Reason**. Click Apply.
6. Click **Save.**

Assign a Case

1. Open the case record.
2. Click the **Change Owner** button along the top right.
3. In the Change Case Owner window, click the drop-down icon in the search field to select either **People** or **Queues.**
4. Enter name for people (agent) or queue (group) in the search field. Click search icon.
5. Once the person or queue is selected, click **Change Owner**. Email will be automatically sent.

Find & View Your Cases

View All of your Cases

1. Click **Cases** in the navigation bar.
2. Click the drop-down arrow next to the case icon, select **My Cases** for your cases or select drop-down arrow next to **My Cases** and search for your team’s queue name to see a list of all cases assigned (e.g., “ITS-Service Desk”).

Search for Specific Cases or Contacts

1. To search for a specific case, enter last four digits of the case number in the global search field at top of page. Click the drop down near **Cases** and select **Cases.**
2. To search for a contact, enter contact name in the global **Search** field and on the left side select Contacts in the drop down and hit enter.
3. For additional **Contact information**, click the contact’s name.

Note: Knowledge articles are great information sources to share with the consumer. Visit Collaborating with Consumer for more information on knowledge and other features.