INFORMATION TECHNOLOGY SERVICES

MYFSU SERVICE CENTER

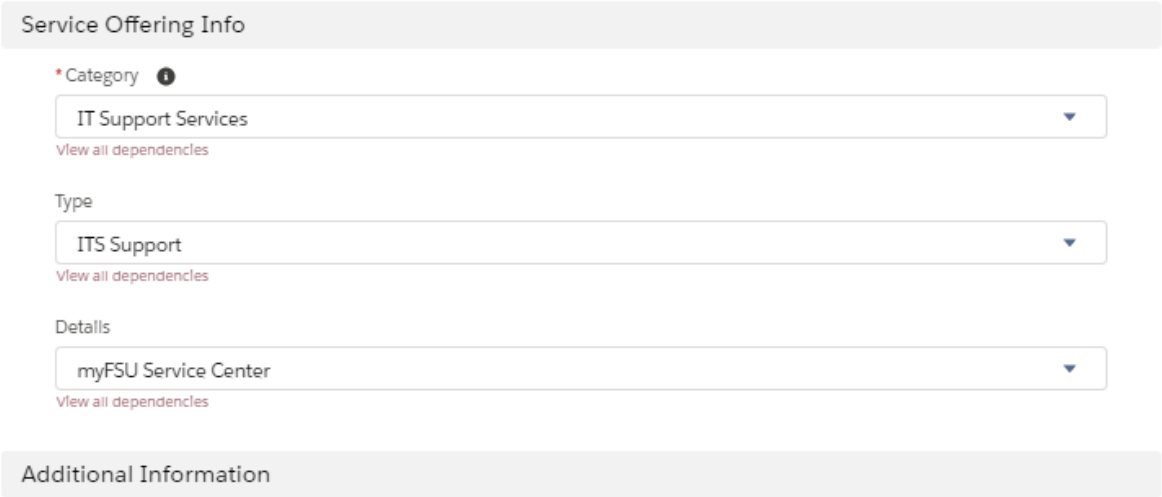
Collaborating with Consumer

TRAINING GOALS

- Learn case features from case intake to case closure.
- Learn how to communicate with our customer/consumer and with other agents.

POST TRAINING

- For questions after the training session, create a case in myFSU Service Center and assign:
  - **Category** - ITS Support Services
  - **Type** - ITS Support
  - **Detail** - myFSU Service Center



AGENDA

- Case Intake, Assignment and Routing.
- Case Management Overview.
- Creating, Owning and Working a Case.
- Collaborating with Customer/Consumer.
- Collaborating Internally on a Case.
- Case Closing and Reopening.
- Additional Information.
- Next Steps.

WORKING THE CASE WITH CONSUMER

CONSUMER EMAIL COMMUNICATIONS

System generated notifications to consumer:

- Case Submission to Authenticated and Unauthenticated Users.
- Self-Service New Comment.
- Case Comment (by Agent).
- Case Closed.
- Case Reopened.
- Failed Case Reopen Attempt (After 30 Days).

Note: There is a myFSU Service Center notifications guide available for agents under **Quick Links** on their Home page.

COLLABORATE WITH CONSUMER

- myFSU Service Center includes a platform for collaborating with the consumer.
- Consumers with FSUID can write comments on their cases for agents to view.
- Agents can view consumer **Case Comments** and write comments back to them from the **case detail** record.
- Agents should update the case status to "Waiting on Consumer" when waiting for additional information or response from consumer.

COLLABORATE WITH CONSUMER VIA CASE COMMENTS

- If Public checkbox is selected, the case comment is visible by Consumer in myFSU Service Center.
- Selecting **Send Customer Notification** will email the consumer that their case has been updated.

1. When a consumer comments on a case the **Case Owner** receives a chatter notification.
2. To open the notification, click **bell icon** in upper right of screen.
3. Click the link in the notification to be directed to the case record.
4. Click **Related** tab. Go to **Case Comments** to see consumer comment.
5. To respond, click **New** button.
6. Write comment in **Body.**
7. Select **Public** via checkbox (**Send Customer Notification** checkbox auto populates to send notification).
8. Click **Save.**

USING KNOWLEDGE WITH CONSUMER

- As the case is created, if available, **Knowledge** articles identified as published public knowledge will be suggested based on the case details such as the subject and routing.
- ITS Knowledge is managed by the Change Leadership and Planning team.
- Agents can draft Knowledge articles, but articles must be submitted for approval before being published.

Note: Agents can find a list of **Knowledge Training Articles** (in the Knowledge section) with instructions on how to create, edit, and submit articles for approval.

USING KNOWLEDGE TO INFORM CONSUMER

- Consumers can solve their own cases using Knowledge (“FAQs”) accessed on myFSU Service Center community site.
- Consumers can also log into myFSU Service Center to view attached articles on the case detail page.

How to Search for Knowledge:

1. Open a Case record.
2. Click Knowledge tab in the case.
3. View pre-populated **Suggested Articles.**
4. Mouse over article title to review content .
5. If you cannot find the article in **Suggested Articles**, search for other knowledge using the **Search Knowledge** search bar.

Note: Only attached Knowledge articles with **Visible to Customer** checked can be viewed by consumers on the case detail page.

ATTACHING OTHER KNOWLEDGE ARTICLES

Follow these steps if the article you need is not listed among the suggested articles.

To attach an article not listed as a Suggested Article:

1. Search for knowledge using **Search Knowledge** search.
2. Enter search criteria and click on Search icon – Magnifying glass or hit Enter.
3. Mouse over article title to review content.
4. Attach the article by clicking the  triangle to the right of the article and selecting the option **Attach Article**.

VIEWING EXISTING KNOWLEDGE

If another agent assigned knowledge articles to a case, you can view what was attached to avoid redundancy.

How to view previously attached articles on a case:

1. Open a Case record.
2. Under the **Parent Case** component on the left of the screen, **Articles** displays all articles attached to the Case.
3. **Alternatively,** go to **Related** tab and find the **Articles** section at the bottom of the page.

SEND AN EMAIL FROM A CASE

- To ensure consumers receive a response to their case, you can email them directly from the case.
- Email or a call is the only way to communicate with an unauthenticated consumer.

1. Go to **Chatter** tab.
2. On **Email** tab, click within the “Write an email” field or select **Compose.**
3. The **To** automatically adds the Contact associated with the case. Alt Email address will be automatically included in the Cc field.
4. Compose the body of your message.
5. Click **Send**.

Notes:

- To add more recipients, enter an email address or search for contacts by selecting the **Look up email addresses** icon.
- To ensure that replies to your Chatter Email are added to the case, keep **From** as the "myFSU Service Center" address.

CASE ATTACHMENTS

- Salesforce supports attachment of files to cases by the customer or the agent.
- Agents can send emails to the customer, directly from the case, and add attachments to that without storage concerns.
- Use a link to attach videos rather than storing it in Salesforce.
- **Data retention policy** will be put into place to reduce the storage requirements in Salesforce. Any data removed from the production Salesforce environment will be archived, not deleted.

ATTACH A FILE FROM WITHIN A CASE

You can add files such as an excel workbook, image or PDF directly to a case.

1. Open **Case** record.
2. Click **Related** tab and go to **Files.**
3. Files from your computer can be attached to a case by:
   - Clicking **Upload Files** to do a one-time upload.
   - Dragging files from computer to **Files** section.
4. To add files owned by or shared with you in the myFSU Service Center click **Add Files.**
5. Click **Done.**

NEXT STEPS

WHAT'S NEXT

We encourage you to:

- Visit the ITS service page for myFSU Service Center quick guides, recordings and other training documentation.
- Access additional resources under **Quick Links** on your Home page in the myFSU Service Center.
- Go to the **Knowledge** section within the myFSU Service Center to view a list of Agent Training articles.
- Be on the lookout for a monthly newsletter for agents that features myFSU Service Center tips, updates, statistics and more!

REMEMBER TO LOG QUESTIONS

- For questions after the training session, create a case in myFSU Service Center and assign:
  - **Category** - ITS Support Services
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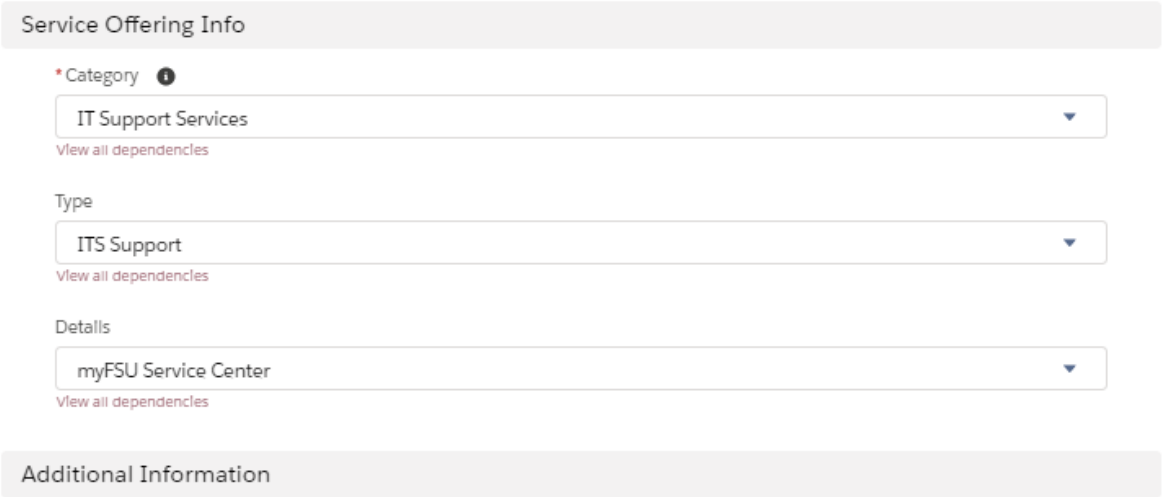

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THANK YOU