**Process Document**

**CRM – Careers**

Liverpool John Moores University

**Careers:**

**Creating a Case**

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A Case should be created for each appointment you have with a student.. The aim of a case is to keep everything stored together about that particular student/meeting – e.g. details of things discussed, documents, appointments, emails. If the student later came back and wanted another appointment, another ‘new’ case should be created.

There are a number of ways in which a Case can be created in CRM. However, you should only need to create cases from the appointment, which will be covered here.

1. **Creating a Case from an Appointment**

Once you have marked the appointment as **Attended or No Show**, you can convert the Appointment to a Case.

## Open up the Appointment.



Click on ‘**Convert To’** field

Select **‘To Case’** from the menu.



A **Convert to Case** window will appear.

The student will pull through to fill the **‘Customer’** field from the **‘Required’** field on the Appointment form.



You now need to pick a **Subject.**

The Subject Header is **Careers.**

There are many different Subjects you can drill down to depending on what the meeting was about. Use the Notes that have been added to the appointment to assist you. You can drill down into sub-subjects by clicking on the triangle:



Click **Select** when you have picked the correct Subject

A ‘**Convert to Case’** window will again appear.



Please ensure that you update **‘ Change the Task Status to Completed and close the form’ to ‘No’.**

Then click **Convert.**

**The Case will be created** and will now appear under **My Active Cases on your Dashboard.**



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## **Assigning a Case**

You can assign a case to another member of your team. Whilst in the case, on the menu ribbon at the top right of the screen click the 3 dots



Click Assign, the following box will open up

Assign to - select either **Me** or **User or Team**



If you select **User or Team**, you can then search for the staff member. Click on the magnifying glass, Look up more records and the following box will open



Look for – should default to User

Look in – User Lookup View

Search – start typing the name of the team member (using \* to wildcard), search

Select the correct person from the search results (the tick will appear next to their name once selected) and click **Add,** then **Assign.**

**Save**