

CREATING A CASE FOR AN ESTABLISHED VENDOR

This job aid will serve as a guide on how to create a new case for an established vendor in PeopleSoft CRM 9.0.



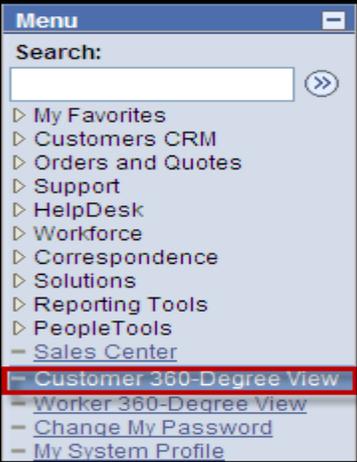
Before beginning the steps below, navigate to <https://myohio.oaks.ohio.gov> and log in with OAKS User ID and password.

Step-by-Step	Screen
<p>1. Click Launch Application link in the Customer Relations Management row in the OAKS Quick Access section</p>	

The OAKS Customer Relations Management (CRM) screen will display.



Step-by-Step for Creating a New Case for an Established Vendor

Step-by-Step	Screen
<p>2. Click on the Customer 360-Degree View link.</p>	

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3. Enter information regarding the customer, such as the **Organization** name.

Optional



If you only know the first letter/number of a search criteria, you can enter it in this **Search for Customer** section, or use **Advanced Search**.

Search For Customer

▼ Search

Organization	<input type="text" value="w carl fell"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Customer ID	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Postal	<input type="text"/>
Country	<input type="text"/>

Search

[Advanced Search](#)

4. Click **Search**.

Search For Customer

▼ Search

Organization	<input type="text" value="w carl fell"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Customer ID	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Postal	<input type="text"/>
Country	<input type="text"/>

Search

[Advanced Search](#)

Note

Search Results will display if more than one entry is found. Click on the [customer](#) link below the **Organization** field that matches your search.

[Create Company](#)

Search Results

Organization	Address
W CARL FELL	405 W FIRST ST, SPENCERVILLE, OH, 45887-1160, USA

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The customer **360-Degree View** page is displayed.

The screenshot shows the '360-Degree View' interface for customer 'W CARL FELL'. At the top, there are navigation tabs for '360-Degree View', 'Relationship Viewer', 'Tasks', and 'Call Reports'. Below the tabs, there is a search bar with '*Role' set to 'Company' and an 'Actions' dropdown menu set to 'Add Case', with a 'Go' button next to it. The main content area is divided into several sections: 'Summary' with customer details (Name: W CARL FELL, Address: 405 W FIRST ST, SPENCERVILLE, OH, 45887-1160, USA, Status: Active), 'Activities' with a date filter set to '7 - View All' and a list of actions like 'View All', 'Add Case', and 'Search Cases', and 'Support Cases' which currently shows 'No Support Cases to display.'. A 'Top of Page' link is visible at the bottom right.

5. Click **Go** beside **Add Case** in the **Actions** field.



Clicking on the **+Add Case** link under **Support Cases** performs the same function (see above).

This is a close-up of the 'Actions' field in the '360-Degree View' page. The dropdown menu is open, showing 'Add Case' as the selected option. The 'Go' button is highlighted with a red rectangular box.

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The **Case** page is displayed.

Case History Select One... 12/15/2011 9:37:57AM EST

Save | Print | Spell Check | 360 360-Degree View | Notification | Clone Case | Personalize

Case ID 519427 **Status** Open - In Progress
Customer W. CARL FELL **Contact**
Summary **Contact Method**
Open Cases 0 **Customer Value**

Case | Solution (0) | Notes (0) | Case History | Related Cases (0)

Customer Information

Company W. CARL FELL
Contact [input]
Site [input]
Contact Method [input] [Edit](#)
Email [input]
Address 405 W FIRST ST, SPENCERVILLE, OH
[Search Again](#)

Inquiry Information

***Inquiry Summary** [input]
***Description** [input]

Case Information

Main | Dev/Tech

***Business Unit** HRD1
Quick Code [input]
***Case Type** Normal
***Case Status** Open - In Progress
 Resolved by First Contact

Escalation Date [input]
Provider Group [input]
***Assigned To** [input]

***Agency/Application** [input]
***Service/Module** [input]
***Inquiry Type/Process** [input]
***Case Priority** Medium
***On Behalf Of** Agency
***Impact** Minor
***Channel** Phone

Save Case | Find Solutions | Escalate Case

Some of the fields have been auto-filled under the **Case** page tool bar, **Customer Information**, and **Case Information** sections.

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6. Click on the **Quick Code** drop down arrow.

7. Choose a **Quick Code** from the list.



The most common problems in various departments are listed in **Quick Code**. This saves time and provides structure by auto-filling some or most of the required fields, depending on the chosen **Quick Code**.

Case Information

Main Dev/Tech

*Business Unit HRD1

Quick Code

*Case Type Application Performance Issues
Benefits COBRA
Benefits Catalyst
Benefits Dependent
Benefits Disability
Benefits Eligibility Cov
Benefits FBMC
Benefits General
Benefits Sequence Issues
Benefits Student Status
Benefits Take Charge Liv
Customer Service

*Case Status

Escalation Date

Provider Group

*Assigned To

*Agency/Application
Drug Test

*Service/Module
ELM - BI Training Materials
ELM - DRC Training
ELM - Enroll in BI Training
ELM - FIN (AM & PO)

*Inquiry Type/Process
ELM - Forms
ELM - OBM/FIN (AR, GL, AP, TE)
ELM - Technical

*On Behalf Of
ELM-DAS Training

*Impact
HR

*Channel
OAKS Security
Policy
Records Request
Records Verification
TL - SS Mgr Exception
TL - SS Mgr Exception Remove
TL - SS Viewer Exception



“How to Resolve” tips may be given under **Description** when **Quick Codes** are used.

Inquiry Information

*Inquiry Summary
Vendor Information Update Status Inquiry

*Description
What to ask for:
Has the customer submitted the Vendor Information Form:
Vendor Name:
Vendor Tax ID#:
When did customer submit the form:
Customer name and job title:
E-mail address:
How to Resolve:
+ Ask the customer if he/she has completed and submitted the Vendor Information Form
- If yes, continue
- If no, direct customer to submit form (See Update Vendor Information Call Script # 3110.02)
- Ask the customer for his/her Vendor Name

Save Case Find Solutions Escalate Case

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8. Check auto-filled fields and make necessary corrections.



Enter data into the highlighted required fields(*) if no **Quick Code** was found or when the Quick Code does not auto-fill all required fields.

The screenshot shows the 'Case Information' form. A red box highlights the following fields: 'Escalation Date', 'Provider Group', '*Assigned To', '*Agency/Application', '*Service/Module', 'Inquiry Type/Process', '*Case Priority', '*On Behalf of', and '*Impact'. The form also includes sections for 'Customer Information' and 'Inquiry Information'.

9. Click **Save**.



Clicking **Save Case** towards the bottom of the **Case** page performs the same function.

The screenshot shows the 'Case' page with a red box highlighting the 'Save' button at the top and the 'Save Case' button at the bottom. The page content is partially visible, showing the 'Customer Information' and 'Inquiry Information' sections.