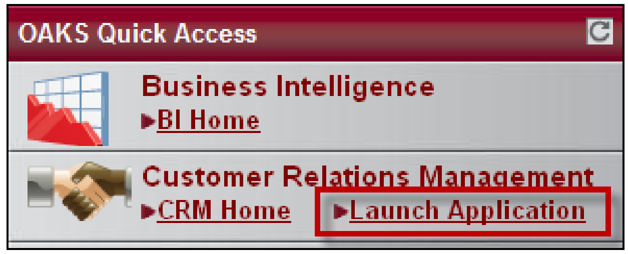
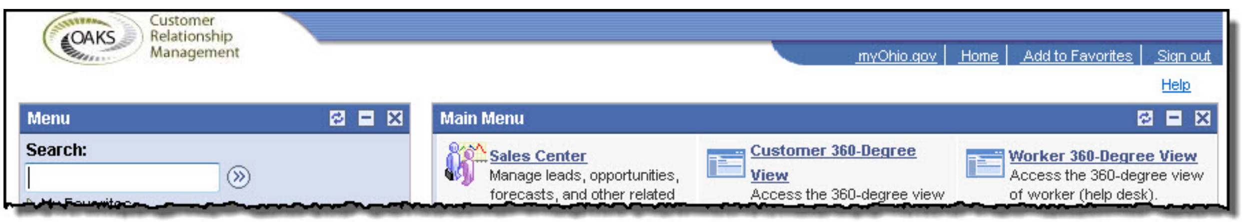
Creating a Case for an Established Vendor

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

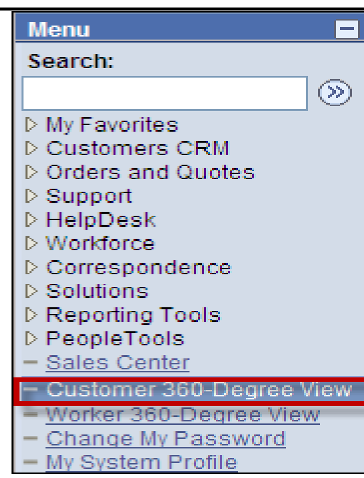
Note Before beginning the steps below, navigate to https://myohio.oaks.ohio.gov and log in with OAKS User ID and password.

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

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



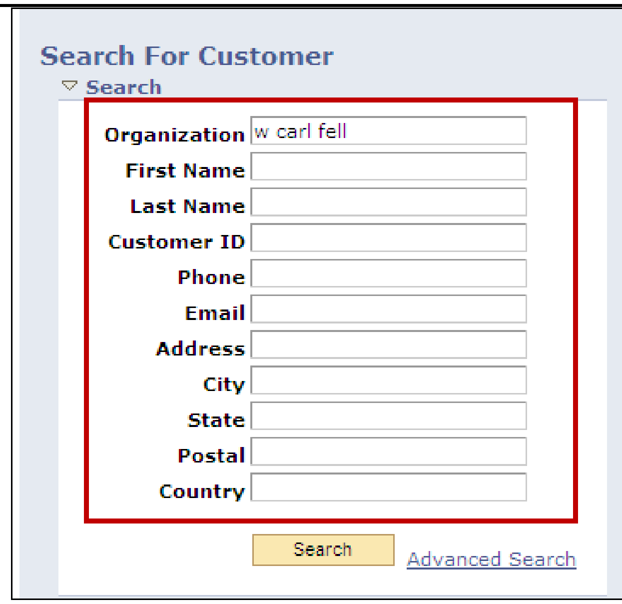
Step-by-Step for Creating a New Case for an Established Vendor

Step-by-Step	Screen
2. Click on the **[Customer 360-Degree View]** link.	

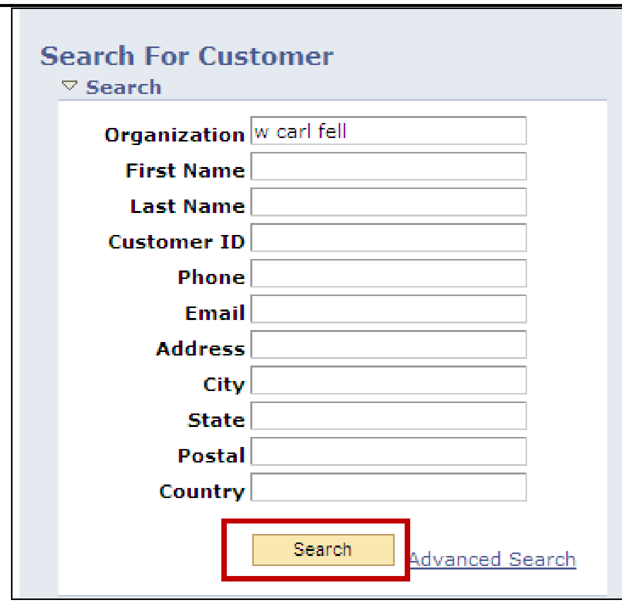
3. Enter information regarding the customer, such as the **Organization** name.

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**.

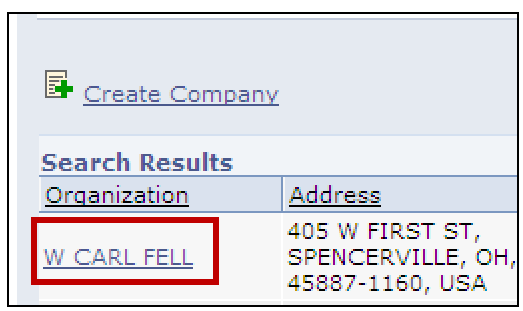


4. Click **Search**.



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.



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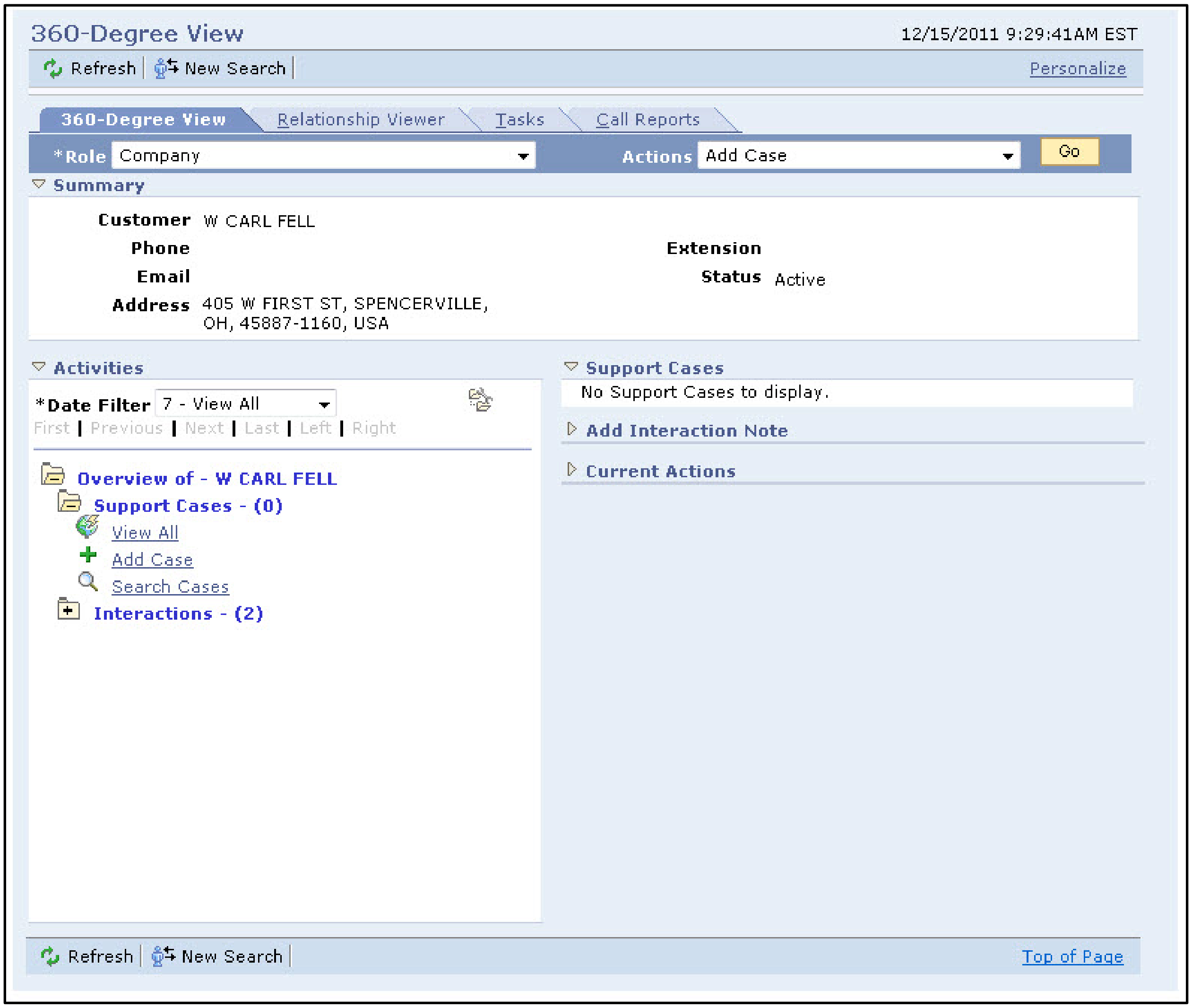
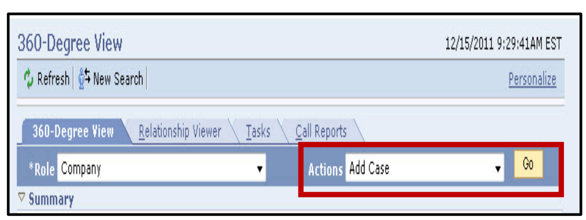
The customer **360-Degree View** page is displayed.



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

Note

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



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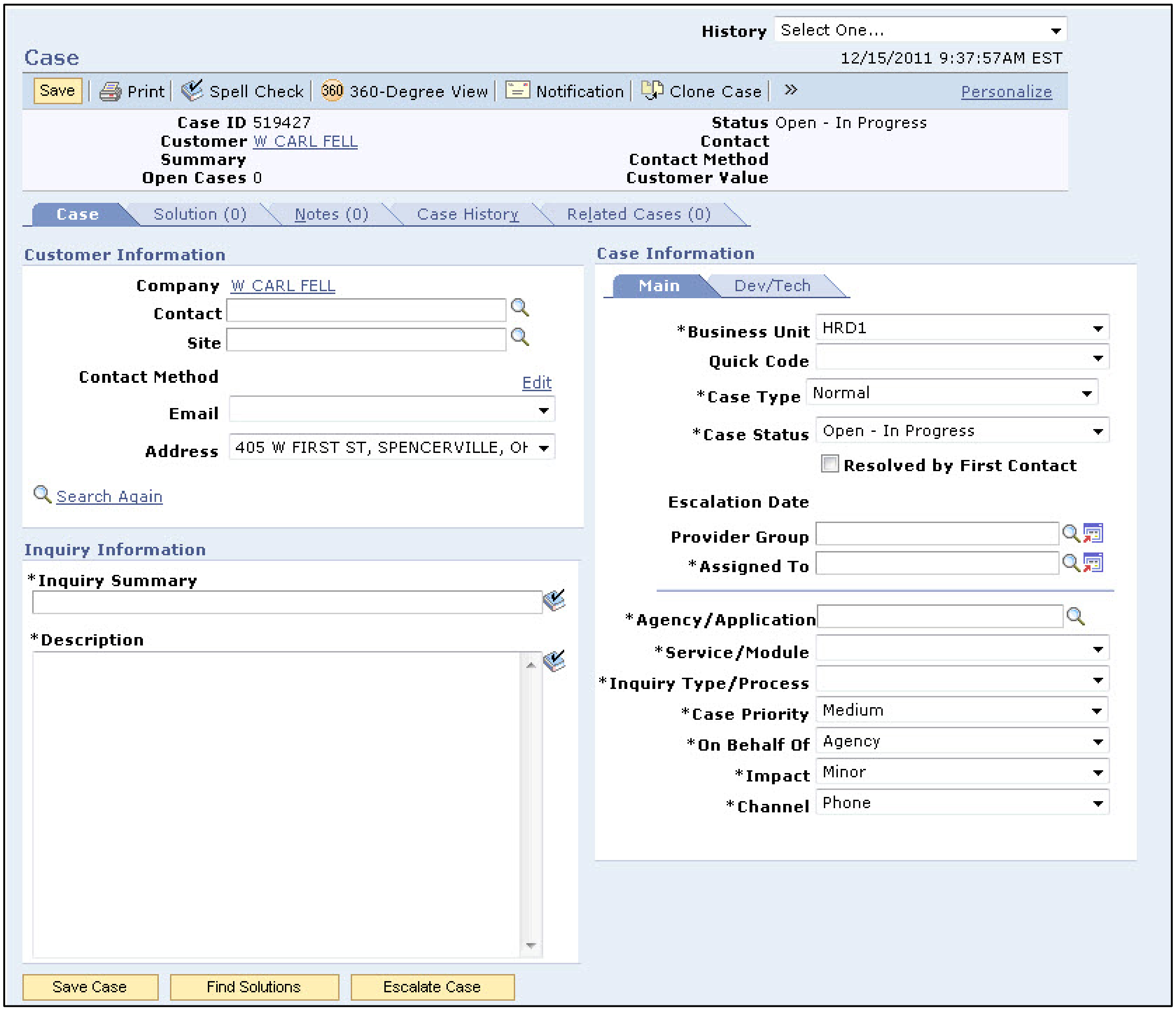
The **Case** page is displayed.



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

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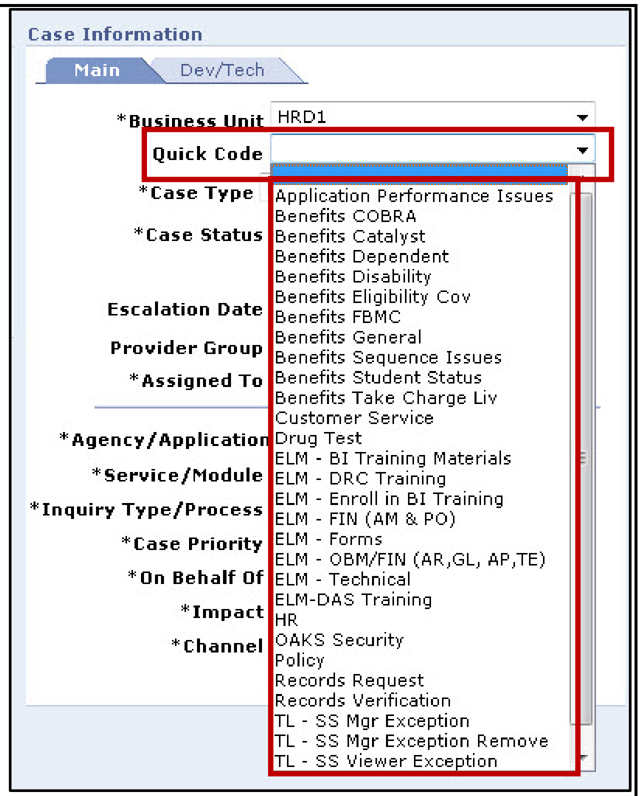
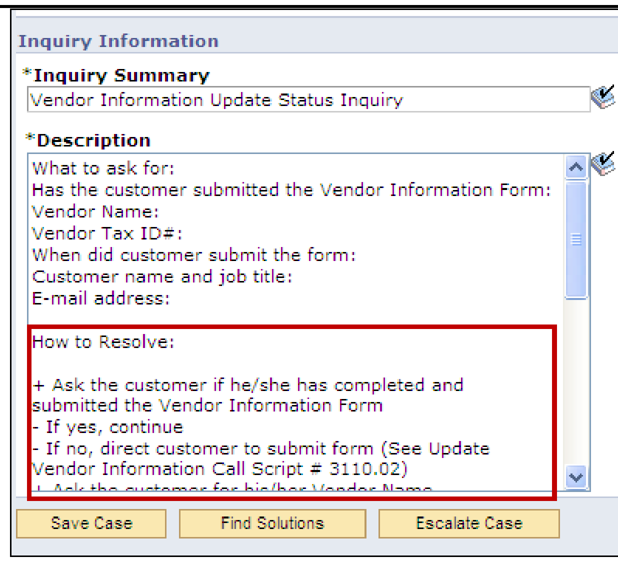
6. Click on the **Quick Code** drop down arrow.

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

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



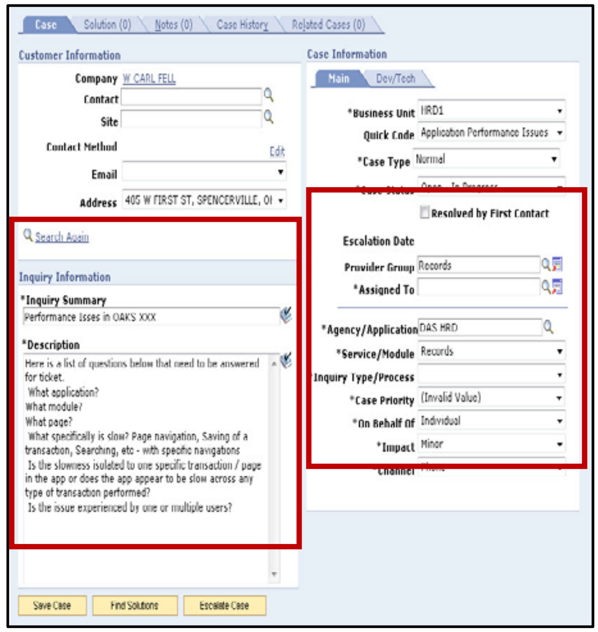
"How to Resolve" tips __**may**__ be given under **Description** when **Quick Codes** are used.



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

Note

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.



9. Click **Save**.

Note

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