How to create a case and view your case

How to create a case (a radius task) and how to view the case you created.

1 Navigate to <u>fiucrm.lightning.force.com/lightning/page/home</u>
2 Click opportunities. All cases are done in opportunities list.
ORIDA TERNATIONAL VIVERSITY Q Search
nan Graduate Home Contacts V Opportunities V Email Templates V Campaigns V Interactions V
formance OPEN (>70%) \$0 GOAL *
Add the opportunities you're working on, then come back here to view your performance.

3 Choose your program lis	st view (pipeline)	
	Gonzalez - Fall Term 2023 Albhrani - Fall Term 2023 Molina - Fall Term 2023 Alqahtani - Fall Term 2023	
Add the opportunities	Recent lists	o view your performance.
	OMSIRE Fall 2023 - Applicants MSF Fall 2023 - Applicants	
	MSF IN PERSON TEST 2	
May	MSF In Person Applicant Fall 2023 TEST IMBA Applicant Fal 2023	Jul)pen (>70%)
	Today's E	vents

4 Choose the applicant in which you are creating the case for. This will always be done out of "opportunity name".

	U FLORIDA INTERNATIONAL UNIVERSITY	Q Search	
	Chapman Graduate Home Co	ontacts 🗸 Opportunities 🖂 Email Templates 🗸 Camp	paigns 🗸
¥	Opportunities MSF Fall 2023 - Applicants ▼ 📝		
50+ ite		es - Academic Interest, Term • Updated a few seconds ago	
	Opportunity Name	Account Name ~	Sta 🕇 🗸
1	Gonzalez - Fall Term 2023	Natalie Gonzalez Administrative Account	Initiated
2	Waqar - Fall Term 2023	Ayesha Waqar Administrative Account	Initiated
3	Rodriguez - Fall Term 2023	Jonathan Rodriguez Administrative Account	Initiated
4	Binyamin - Fall Term 2023	Ramatu Binyamin Administrative Account	Incomple
5	Colman - Fall Term 2023	Sofia Colman Administrative Account	Incomple
6	Arko - Fall Term 2023	Mansib Tahsin Arko Administrative Account	Incomple
6 7	Arko - Fall Term 2023 Gonzalez - Fall Term 2023	Mansib Tahsin Arko Administrative Account Matthew Gonzalez Administrative Account	Incomple

5 Click "Create Case"

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ons 🗸	Plans 💉	~	Relationships 🗸	Term	s V	Tasks 🗸	Repo	rts	∨ Dash	boards	s 🗸 N	∕lore ▼		
						+ Follow	Ne	v Inte	eraction	Crea	te Case	New	Invoice	•
itted) }	Confirme	Ł		\rangle	Close	d			✓ Mar	k Stage	as Comple	
														Edit
				Re	lated	List Quick	Links (Ð						
						s (10+) actions (3)		🙂 C	Contact Role Opportunity History (10+	Field				

6 Click "queue" not person. Queue opens it up to all admissions team.

Activity Chatter	Details		С
 Application Status 			
PS Program Action	APPL	Create Case	
PS Action Reason		* Are you assigning this case to a person or a queue?	
Application Number 🚯	1231483	Person	
Interviewed Date		Queue	
Waitlisted			
Active Opportunity			
Financial Aid Applicant			
Completed FAFSA		Notes	4/18 - F 3/25 -P
			GMAT/0 degree
		Override Assignment	

7 Click "Next"

) Case			Contact Roles (1)	
			Opportunity Field History (10+)	
			Notes & Attachments (0)	
			Parent Contact (3+)	
		Next	022 opplicant Opportunity	•
nended for admission	1	Recruitment interest: Academic Interest:	Finance - MSF:Finance Online	
SOP and 2 proofs of residency		Gonzalez - Spring Term		
ived for having completed MSM		Opportunity Record Recruitment Interest:	Applicant Opportunity	
U - 3.9 GPA		Academic Interest:	Finance - MSF	
		Gonzalez - Spring Term	2023	
		Opportunity Record Recruitment Interest:	Applicant Opportunity	
56 AM		Academic Interest:	International Real Estate - MS:Intl Real Estate Online	
			View All	

8 Click this dropdown and choose "Chapman Admissions" unless other wised told to choose other option.

x	Contact Roles (1) Opportunity Field History (10+) Notes & Attachments (0)
* *	Parent Contact (3+)
	inance - MSF:Finance Online 023 upplicant Opportunity inance - MSF
Previous Next	023 upplicant Opportunity nternational Real Estate - MS:Intl Real Estate Online

9 Click this dropdown and choose "Admissi	ions"
X	KS (1) Contact Roles (1) Opportunity Field History (10+)
×	Notes & Attachments (0)
	Parent Contact (3+)
X	Applicant Opportunity inance - MSF:Finance Online 023 Applicant Opportunity
	inance - MSF 023 opplicant Opportunity
Previous Next	nternational Real Estate - MS:Intl Real Estate Online

10 Click this dropdown and choose which request you are creating.

	lontact Roles (1)
×	Opportunity Field History (10+)
	Notes & Attachments (0)
\$	
Å	Parent Contact (3+)
	022
	opplicant Opportunity
	inance - MSF:Finance Online
×	
^	opplicant Opportunity
	inance - MSF
	opplicant Opportunity
	nternational Real Estate - MS:Intl Real Estate Online
Previous	View All

Click this field.

Chapman Ad	dmissions			
* Category				
Admissions				
* Request				
Calculate Do	omestic GPA I	ĨŬ		
Opportunity				
	ez - Fall Term	2023		
Description				
		Academic Interest 🕕	Finance - MSF	1
, 2/24/2023, 10:20 AM		Term 🚯	Fall Term 2023	1
5/4/2023, 2:30 PM		Term Session		1
	T.	Start Date		1

Type what pertains to your open case

Click "Next" and your case is created.

	* * *	022 opplicant Opportunity inance - MSF:Finance Online 023 opplicant Opportunity inance - MSF 023	
	Previous Next	opplicant Opportunity International Real Estate - MS:Intl Real Estate Online View All	
1 1 1 1	00001083 Subject: Date/Time Opened: Priority: 00001084	3324932 3/8/2023, 11:17 AM Medium	
3Z //	Subject: Date/Time Opened: Driority:	3324932 3/8/2023, 11:37 AM Modium	

Next you will go view your created case.

15 Click here.

	Check Her								
							*•		6
ons 🗸	Plans 🗸	Relationships 🗸	Terms 🗸	Tasks 🗸	Reports	s 🗸 Das	hboards 🗸	More	, and the
				+ Follow	New I	nteraction	Create Cas	se New Invoice	•
itted	\rightarrow	Confirmed			Closed			Mark Stage as Comp	olete
									Edit
			Related	List Quick Li	inks 🚯				
			Case:	s (10+)	2	Contact Ro	les (1)		
			🗐 Intera	actions (3)	•	Opportunit History (10	y Field +)		
			•		~				

										★ -	8 @ ?	20+
ons 🗸	Plans	~	Relationships	~	Terms	~	Tasks 🗸	Reports	s 🗸 Da	shboards		
							+ Follow	New	Interaction	Create	Cases Leads Invoices	 voice 🔻
tted			Con	firmed				Closed			List Emai	Complete
												Edit
					Relat	ted I	_ist Quick I	_inks 👩				
							(10+) ctions (3)	20 (11)	Contact Re Opportuni History (10	ty Field		

17 Select your program's list view from drop down. You can "pin it" so its always the view you see when you open cases

ΊU	FLORIDA INTERNATIONAL UNIVERSITY			Q S	earch
Ch	napman Graduate	Home Contacts	 Opportunities 	Email Templates	🗸 Campaigns 🗸
	ses ecently Viewed				
	Case Number	~	Subject	~	Status
- E		1	CORD LI DETEN		
1	00001101		3324932		New
1 _ 2 _	00001101		3324932		New
			<u>3324932</u> <u>3324932</u>		20.04.04.04.00
2	00001069				New
2	00001069		3324932		New Closed
2	00001069 00001083 00001082		<u>3324932</u> <u>6323048</u>		New Closed Closed

18 Click on your specific case list view *** Chapman Graduate... Home Contacts 🗸 Opportunities 🗸 Email Templates $\,\,\,\lor\,\,$ Campaigns 🗸 In Cases Recently Viewed 🔻 👎 7 items Q Search lists... Status RECENT LIST VIEWS New 1 Admission Task - MSIRE New 2 MSF In-Person Cases Spring/Fall 2023 Closed 3 OMSF Cases Spring/FALL 2023 Closed 4 New 5 OMSIRE Cases Spring/Fall 2023 New 6 Recently Viewed (Pinned list) ~ New 7 ALL OTHER LISTS All Open Cases **Chapman Admissions**

19 Click on PID to open the case you created

00001087	Natalie Gonzalez	3324932	New	High	3/27/2023, 12
00001088	Natalie Gonzalez	3324932	New	High	4/19/2023, 12
00001089	Natalie Gonzalez	3324932	New	High	4/19/2023, 12
00001091	Natalie Gonzalez	3324932	New		5/4/2023, 2:5
00001092	Natalie Gonzalez	3324932	New	Medium	5/4/2023, 7:0
00001096	Natalie Gonzalez	3324932			
00001098	Natalie Gonzalez	3324932			
00001099	Natalie Gonzalez	3324932			
00001101	Natalie Gonzalez	<u>332493</u> 2			

20 Here you can see when the case was created and what time

New	
Case Origin	
Priority Medium	
Reconsideration	
Description FIU Grad 2021	
System Information Date/Time Opened	Date/Time Closed
5/8/2023, 1:46 PM	
Created By 🔂 Trey Stephens , 5/8/2023, 1:46 PM	Last Modified By Image: Trey Stephens , 5, PM
Web Email	