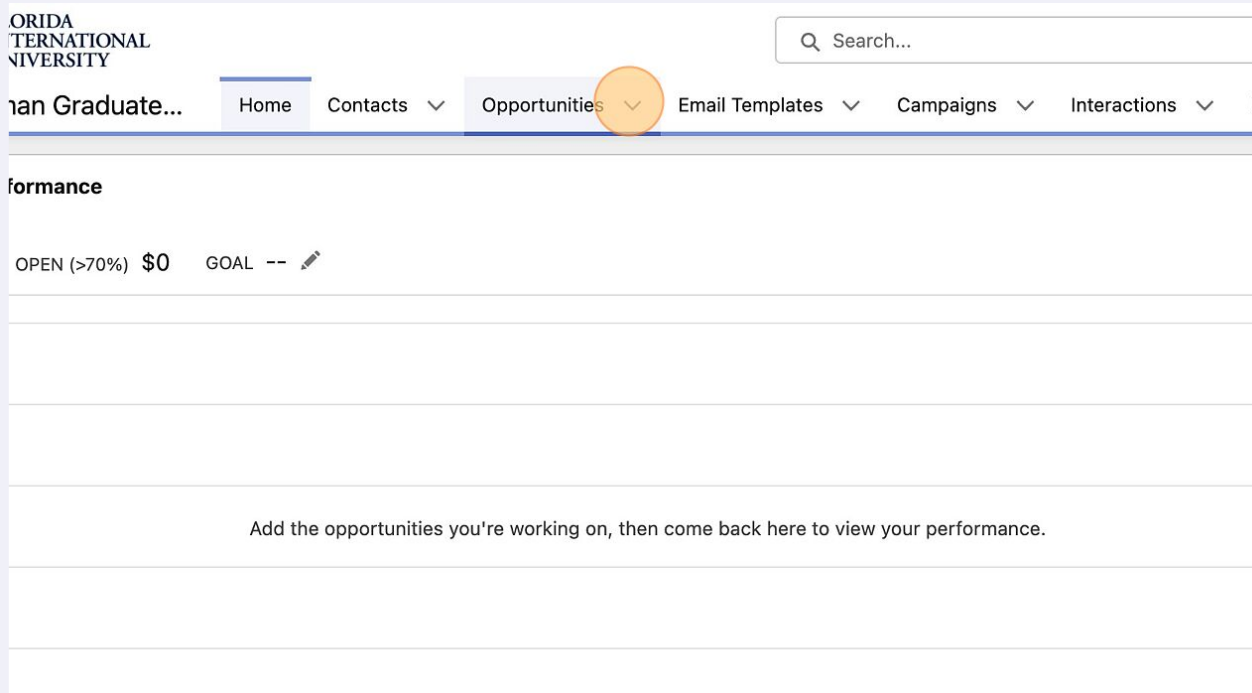


How to create a case and view your case

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

1 Navigate to fiucrm.lightning.force.com/lightning/page/home

2 Click opportunities. All cases are done in opportunities list.



3 Choose your program list view (pipeline)

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

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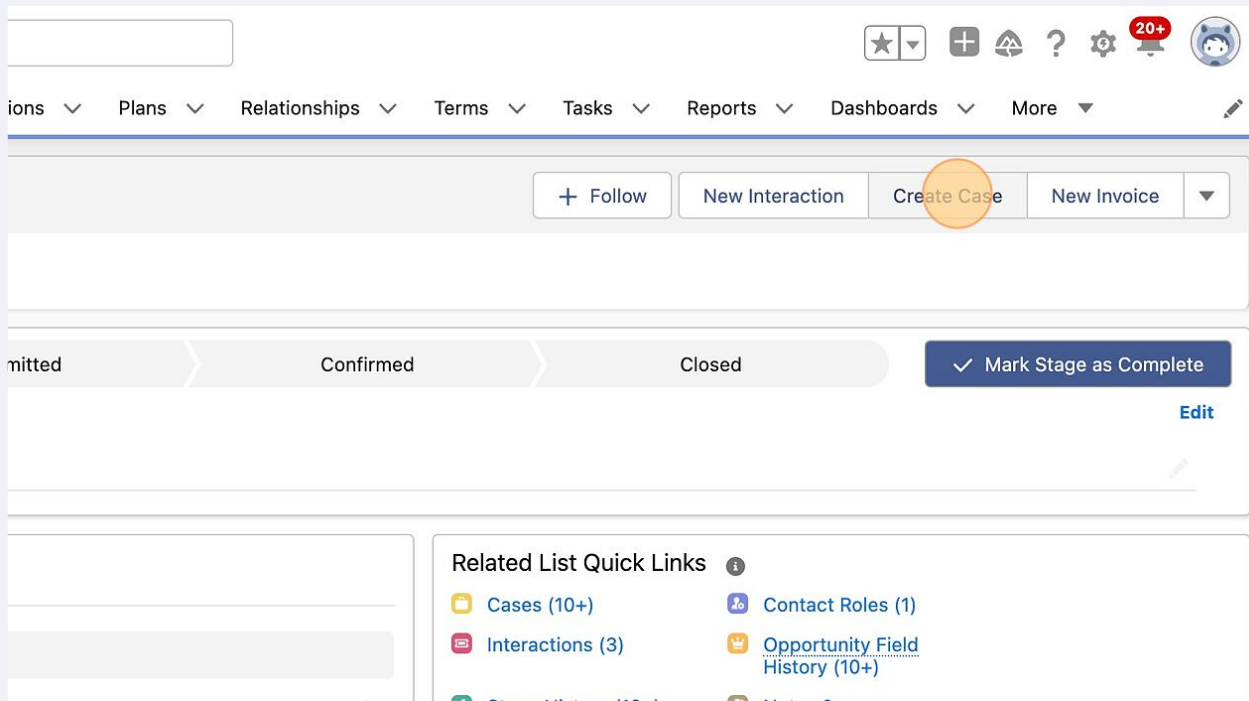
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Opportunities MSF Fall 2023 - Applicants

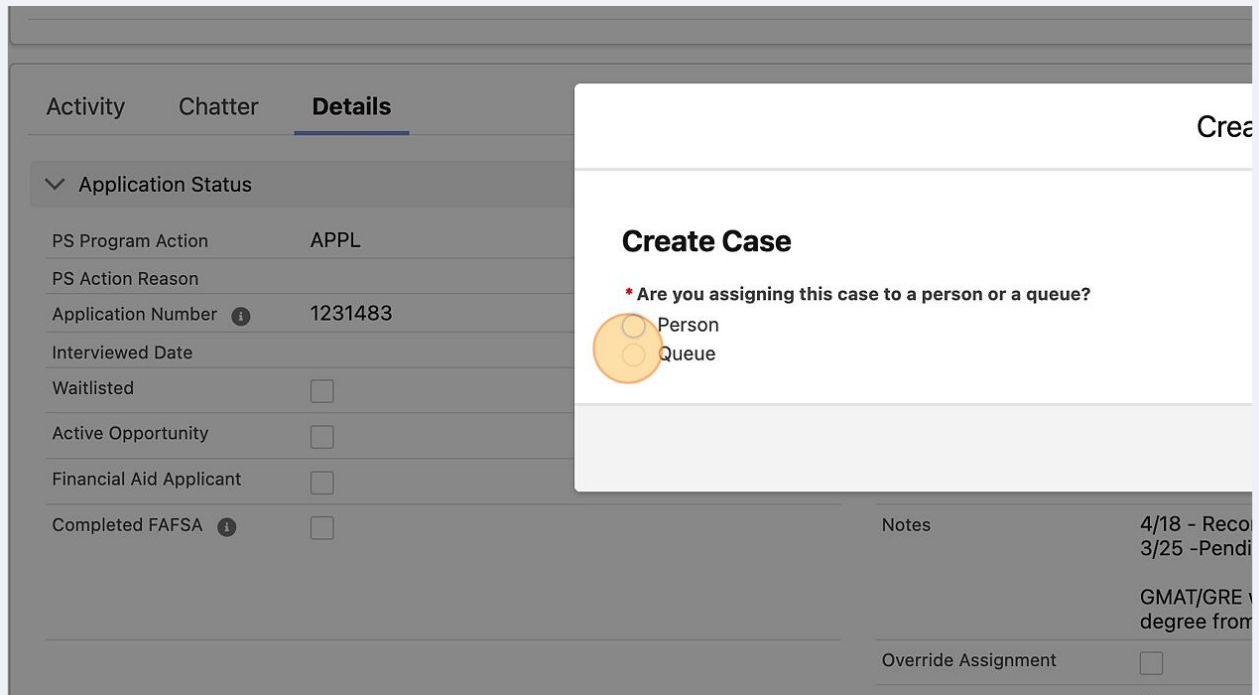
50+ items • Sorted by Stage • Filtered by All opportunities - Academic Interest, Term • Updated a few seconds ago

	Opportunity Name	Account Name	Sta...	C
1	Gonzalez - Fall Term 2023	Natalie Gonzalez Administrative Account	Initiated	3
2	Waqar - Fall Term 2023	Ayesha Waqar Administrative Account	Initiated	0
3	Rodriguez - Fall Term 2023	Jonathan Rodriguez Administrative Account	Initiated	0
4	Binyamin - Fall Term 2023	Ramatu Binyamin Administrative Account	Incomple...	0
5	Colman - Fall Term 2023	Sofia Colman Administrative Account	Incomple...	2
6	Arko - Fall Term 2023	Mansib Tahsin Arko Administrative Account	Incomple...	0
7	Gonzalez - Fall Term 2023	Matthew Gonzalez Administrative Account	Incomple...	2
8	Dolmus - Fall Term 2023	Marcella Dolmus Administrative Account	Incomple...	0

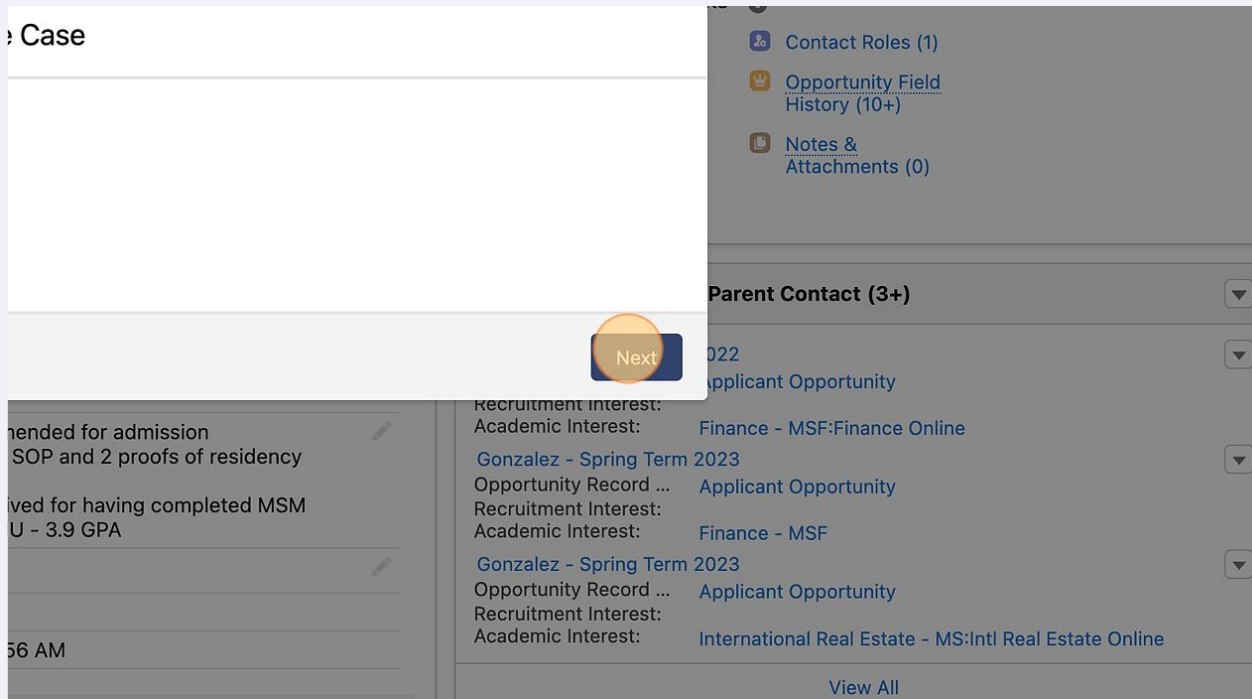
5 Click "Create Case"



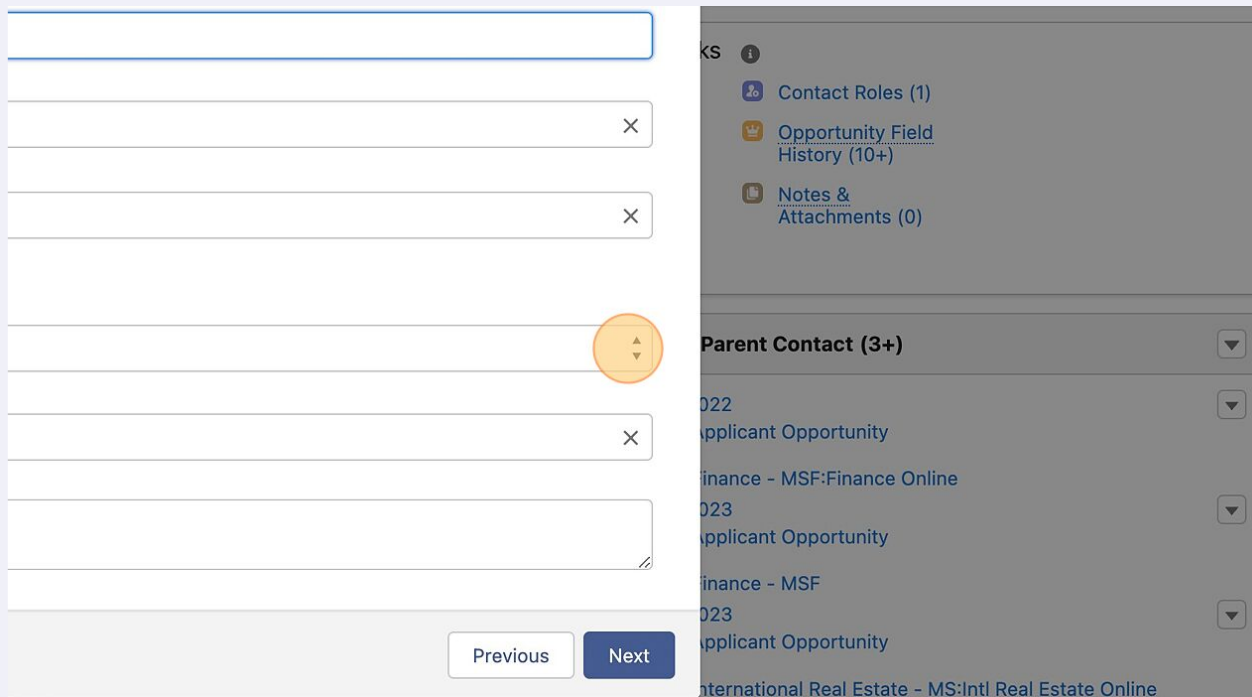
6 Click "queue" not person. Queue opens it up to all admissions team.



7 Click "Next"



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



9 Click this dropdown and choose "Admissions"

The screenshot shows a CRM interface with a dropdown menu open. The dropdown menu is positioned over a list of items. The item 'Admissions' is highlighted with a blue border. A yellow circle highlights the dropdown arrow icon. The background shows a list of items including 'Contact Roles (1)', 'Opportunity Field History (10+)', 'Notes & Attachments (0)', 'Parent Contact (3+)', and several 'Applicant Opportunity' entries with dates like '022' and '023'. At the bottom of the dropdown menu, there are 'Previous' and 'Next' buttons.

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

The screenshot shows the same CRM interface as in step 9. The dropdown menu is open, and a different item is highlighted with a blue border. A yellow circle highlights the dropdown arrow icon. The background shows the same list of items as in step 9. At the bottom of the dropdown menu, there are 'Previous' and 'Next' buttons.

11 Click this field.

The screenshot shows a web form with the following fields:

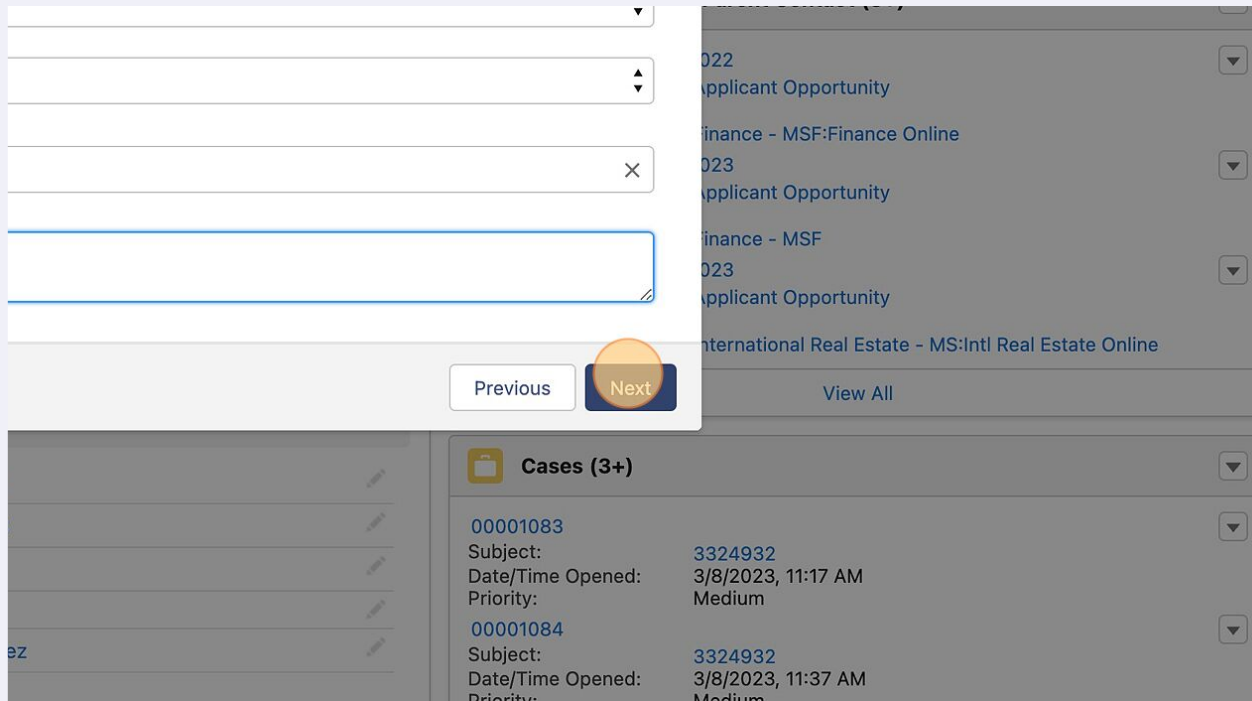
- Chapman Admissions
- * Category: Admissions
- * Request: Calculate Domestic GPA FIU (highlighted with an orange circle)
- Opportunity: Gonzalez - Fall Term 2023
- Description: (empty)

Below the form, a table is partially visible with the following content:

	Academic Interest ⓘ	Finance - MSF
, 2/24/2023, 10:20 AM	Term ⓘ	Fall Term 2023
5/4/2023, 2:30 PM	Term Session	
	Start Date	

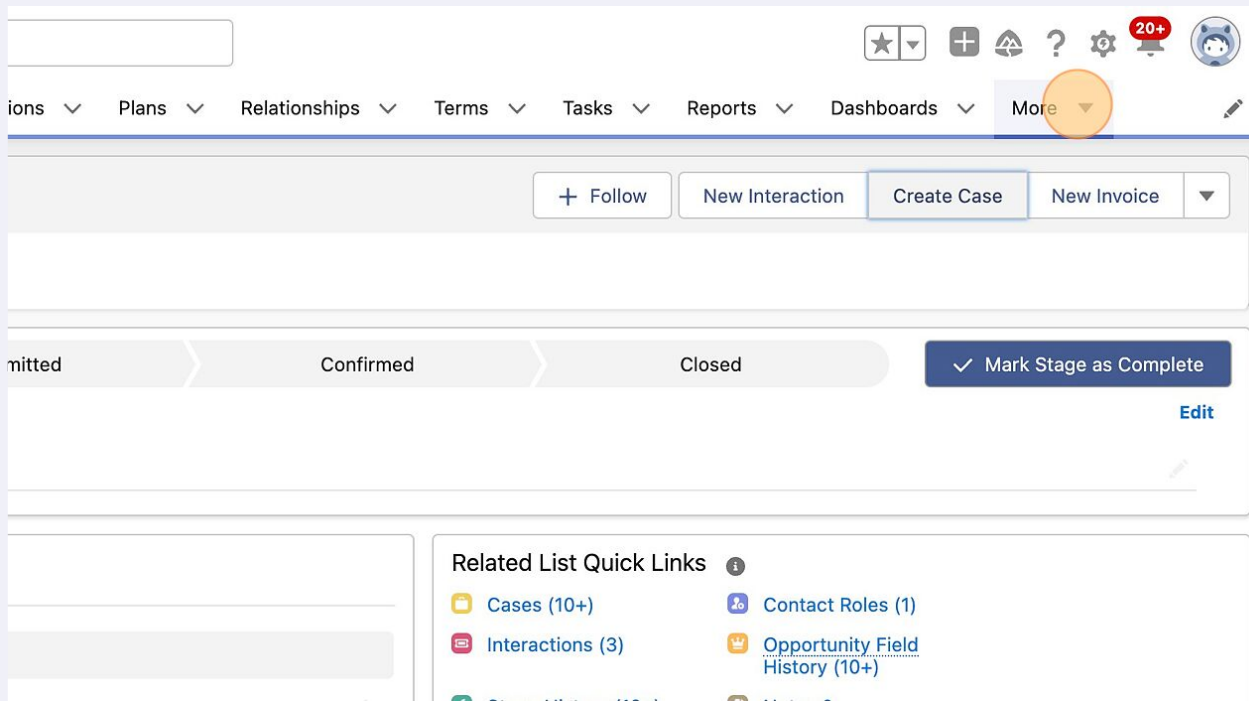
12 Type what pertains to your open case

13 Click "Next" and your case is created.

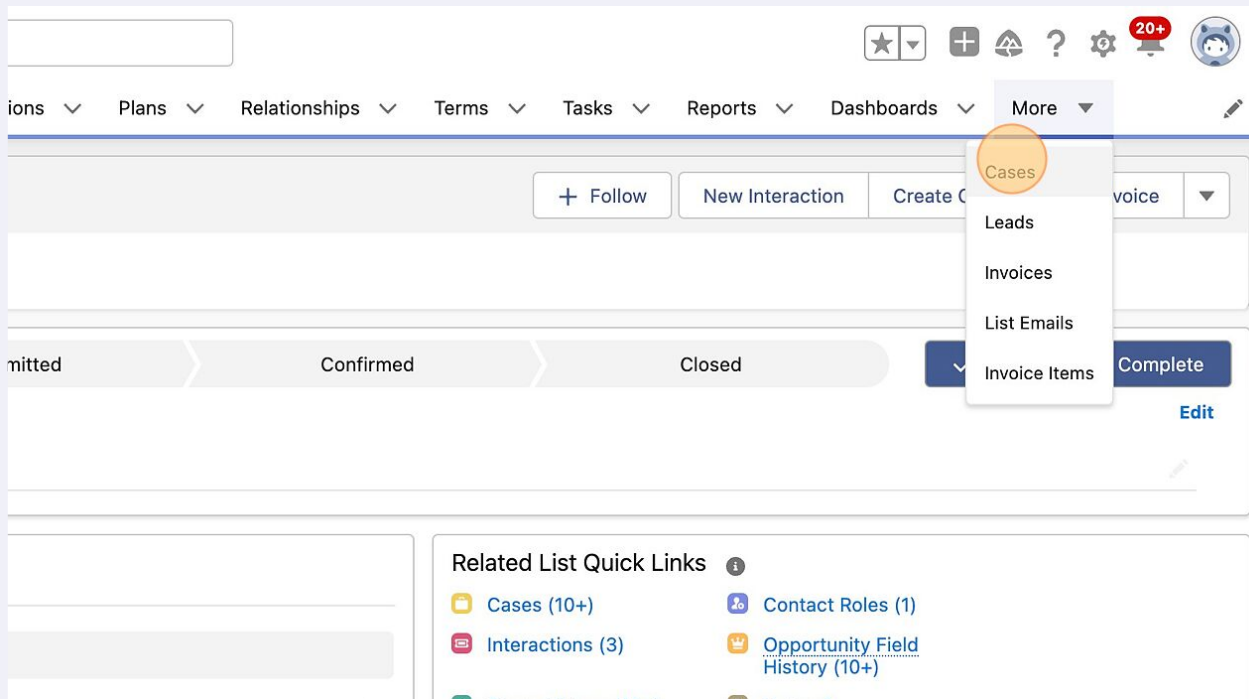


14 Next you will go view your created case.

15 Click here.



16 Click "Cases"



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

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Cases **Recently Viewed** [dropdown arrow] [pin icon]

7 items • Updated a few seconds ago

	<input type="checkbox"/> Case Number	<input type="checkbox"/> Subject	<input type="checkbox"/> Status
1	<input type="checkbox"/> 00001101	3324932	New
2	<input type="checkbox"/> 00001069		New
3	<input type="checkbox"/> 00001083	3324932	Closed
4	<input type="checkbox"/> 00001082	6323048	Closed
5	<input type="checkbox"/> 00001099	3324932	New
6	<input type="checkbox"/> 00001098	3324932	New
7	<input type="checkbox"/> 00001088	3324932	New

18

Click on your specific case list view

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Cases **Recently Viewed** [dropdown arrow] [pin icon]

7 items

		<input type="checkbox"/> Status
RECENT LIST VIEWS		
1	Admission Task - MSIRE	New
2	MSF In-Person Cases Spring/Fall 2023	New
3	OMSF Cases Spring/FALL 2023	Closed
4	OMSIRE Cases Spring/Fall 2023	Closed
5	Recently Viewed (Pinned list)	New
6		New
7		New
ALL OTHER LISTS		
	All Open Cases	
	Chapman Admissions	

19 Click on PID to open the case you created

<input type="checkbox"/>	00001087	Natalie Gonzalez	3324932	New	High	3/27/2023, 12
<input type="checkbox"/>	00001088	Natalie Gonzalez	3324932	New	High	4/19/2023, 12
<input type="checkbox"/>	00001089	Natalie Gonzalez	3324932	New	High	4/19/2023, 12
<input type="checkbox"/>	00001091	Natalie Gonzalez	3324932	New		5/4/2023, 2:5
<input type="checkbox"/>	00001092	Natalie Gonzalez	3324932	New	Medium	5/4/2023, 7:0
<input type="checkbox"/>	00001096	Natalie Gonzalez	3324932			5/5/2023, 1:5
<input type="checkbox"/>	00001098	Natalie Gonzalez	3324932			
<input type="checkbox"/>	00001099	Natalie Gonzalez	3324932			
<input type="checkbox"/>	00001101	Natalie Gonzalez	3324932			

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

Status New	
Case Origin	
Priority Medium	
Reconsideration <input type="checkbox"/>	
Description FIU Grad 2021	
System Information	
Date/Time Opened 5/8/2023, 1:46 PM	Date/Time Closed
Created By Trey Stephens, 5/8/2023, 1:46 PM	Last Modified By Trey Stephens, 5/8/2023, 1:46 PM
Web Email	
Subject 3324932	