

## Resolve a case

1. Choose **RESOLVE CASE**

2. Fill in the required information

3. Choose **Resolve**

## Assign a case to someone else

- Find and open the case you'd like to assign.

1. Choose **Assign**.

2. Select who you want to assign the case to

3. Choose **Assign**

# Microsoft Dynamics CRM Quick Reference for a Customer Care Representative

## Create a new case

A customer care representative can easily create and manage cases using Microsoft Dynamics CRM.

- Go to **Service > Cases**. ([How do I get there?](#))
- Choose **New Case**. For a phone support case, choose **Phone Support**.
- On the form, enter the case information.

Cancel a case

Add a case to a queue

Assign a case to someone else

Resolve a case

Select the account or customer and enter the case title

Add case activities

See what kind of support the customer is entitled to

Look for similar cases

View merged cases

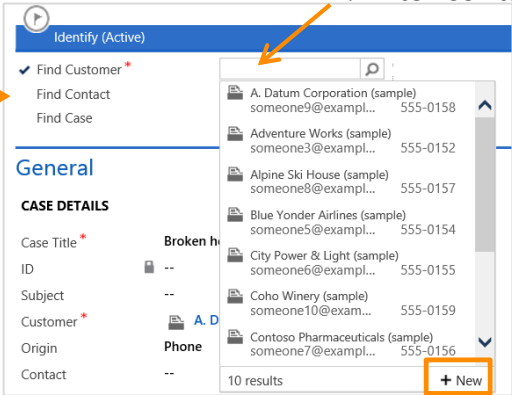
View or add child cases

## Find a customer

1. In the **Customer** field, type in a few letters of the customer's info and press **Enter**. If there's no record, choose **New** and add the customer info.
2. Choose the **Contact** lookup button and select an existing contact for the case or choose **New** to create a contact record.

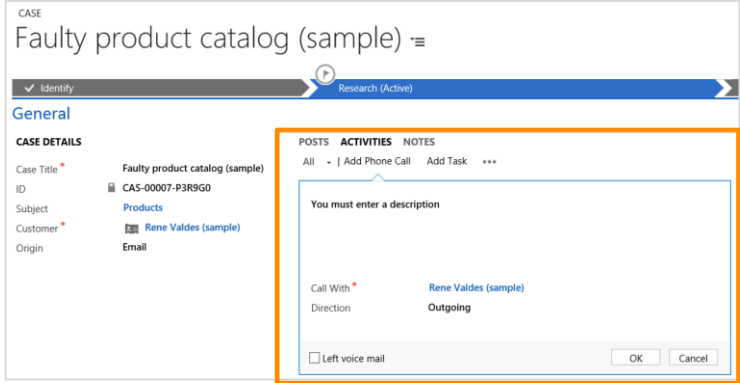
1. Enter contact info

2. Enter the contact's name



## Add activities, phone calls, and notes

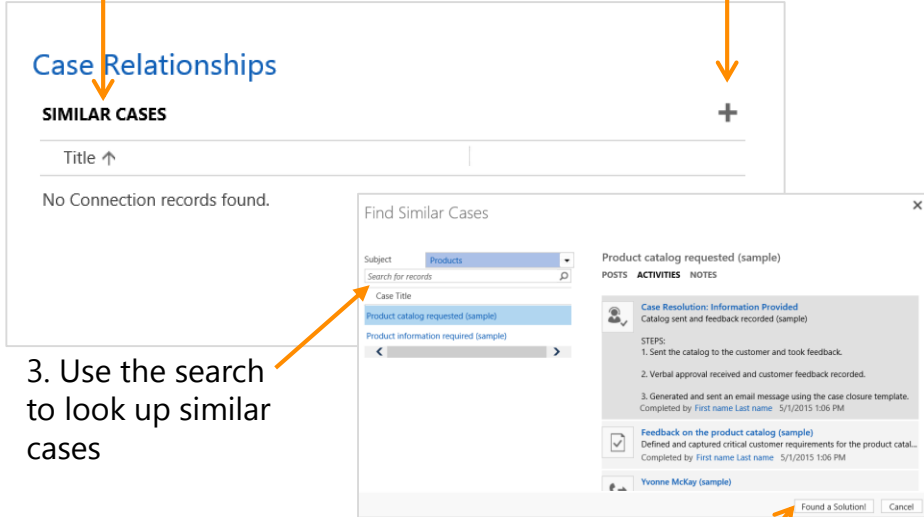
- Choose **Activities** > **Add Phone Call** or choose **Notes** to add your case activities and notes.



## Look for similar cases

When you're working on a case, you can look at similar cases to see if they can help you resolve the case you're working on.

1. Choose **Similar cases**
2. Choose the **+** icon



3. Use the search to look up similar cases

4. Choose **Found a Solution**

## Before you create a new case, check for existing ones

- From the Identify stage in the process bar, choose the **Find Case** field and use the search to find an existing case or choose **New** to add a case.

Use the search to look for an existing case

