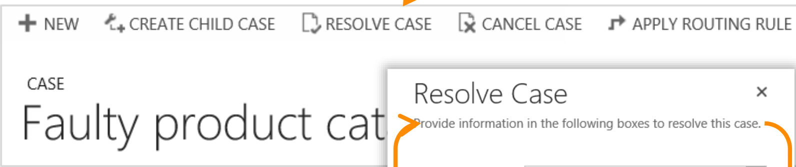
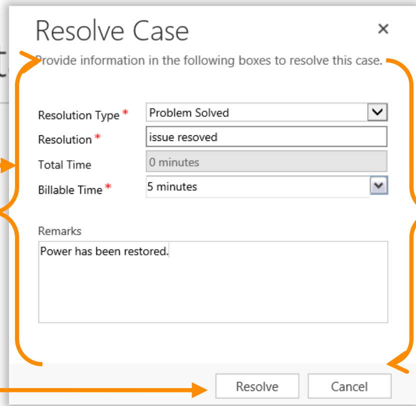
Resolve a case

1. Choose **RESOLVE CASE**



2. Fill in the required information

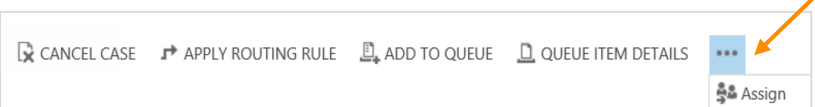


3. Choose **Resolve**

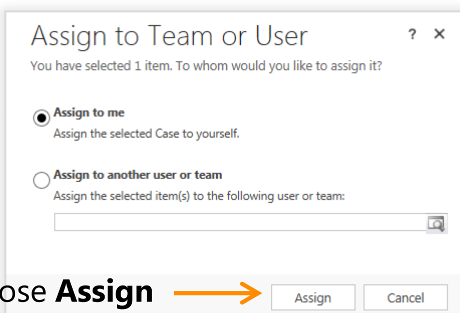
Assign a case to someone else

- 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**

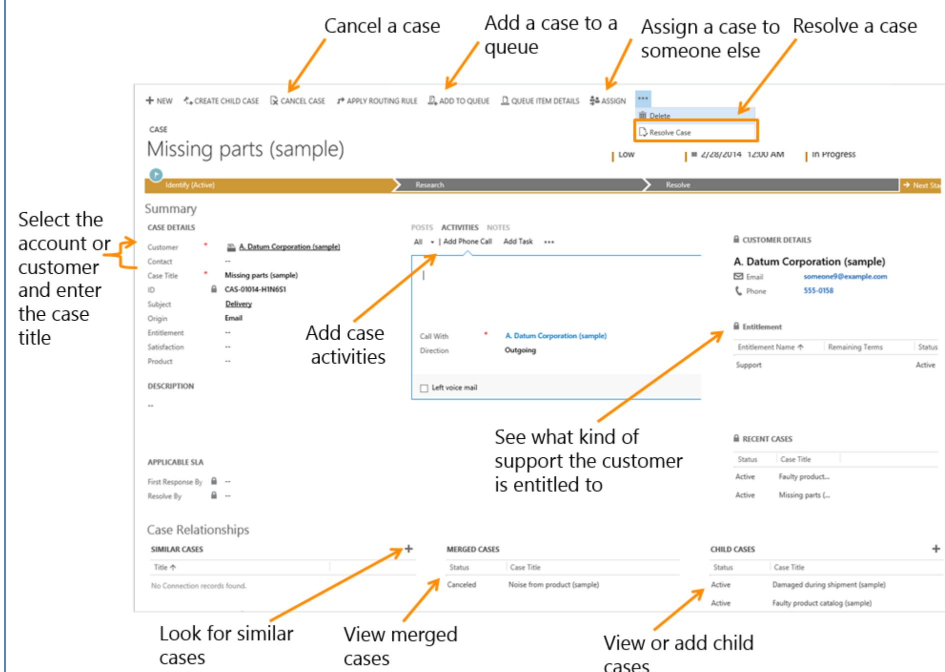
PRINT SETTINGS For best results, set printer options to: Paper Size: Letter (8.5x11"); Orientation: Landscape; 2-sided printing options: Two-sided, flip on short side.

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.

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

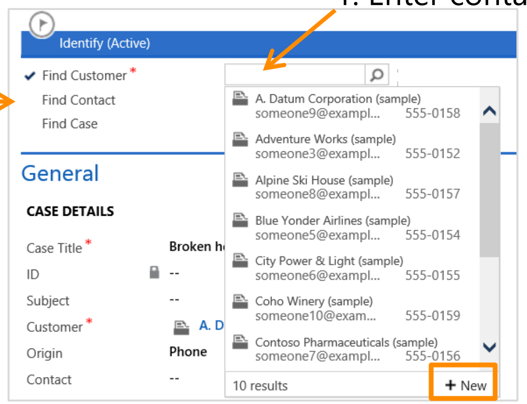


Find a customer

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.

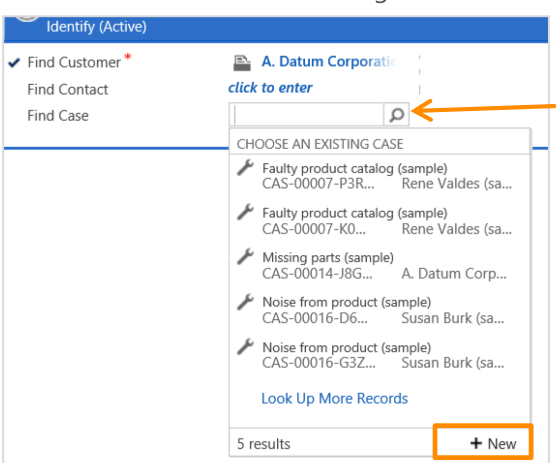
1. Enter contact info

2. Enter the contact's name



Before you create a new case, check for existing ones

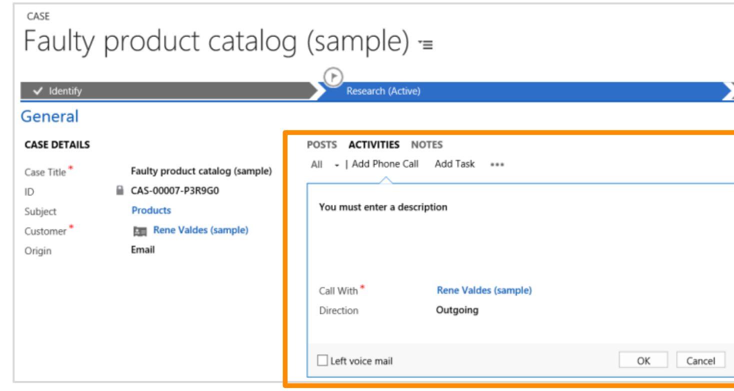
- From the Identify stage in the process bar, choose the **Find Case** field and use the search to find an existing case or choose **New** to add a case.



Use the search to look for an existing case

Add activities, phone calls, and notes

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

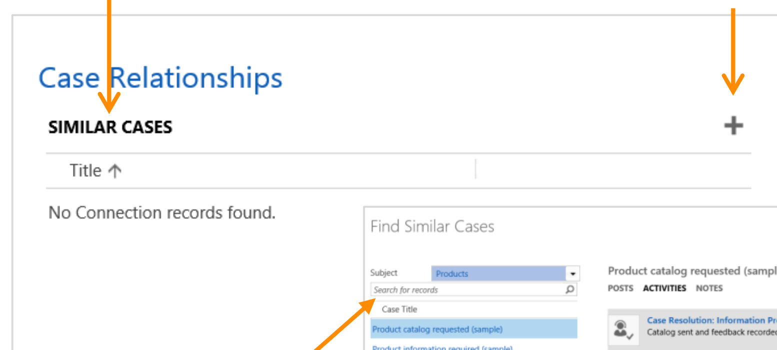


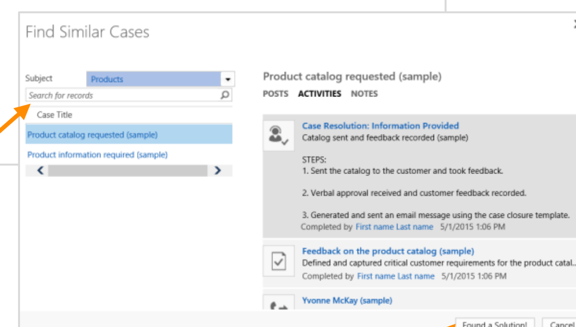
Look for similar cases

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**