# Image result for liverpool john moores university logo

# Process Document

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**CRM – Careers**

Liverpool John Moores University

**Careers:**

**Set an Email Regarding a Case**

Version 0.1 November 2020

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First of all you need to read the email & check if it appears to relate to an existing issue.

You also need to check if the person sending the email is the **Student** or an **Academic/ or Member of Staff** Emailing about a student.

1. **If the Sender is a Student:**
* Click on their name in the **‘From’** box of the Email highlighted in Blue to access their contact record.
* Once you are in the Contact Record, you can then check whether they have any other cases which the email may relate to.
* Please make sure you are in the **‘SA’** version of the Contact Form. This is displayed above the student’s name.
* You can click into the students cases by clicking on the **Brief Description** highlighted in blue (if you have the correct access).

* If you are satisfied that a **New Case is required**, you can head back to your dashboard, open

up the email and convert it to a new case.

* If you find this email is related to an **Existing case** then you will next need to make a note of the particular case and set the email regarding the existing case. **(See section 3: Setting the Email against the Case)**





1. **If the Sender is an Academic/Staff:**
* You will first need to read the email and ascertain which student the email is regarding.

* Make a note of any details that have been provided about students (including: Name/Student ID etc).
* You will then need to navigate to **‘Contacts’** and search using the information given. If you have the Student ID this is the best way to search.
* Once you have located the students Contact record, you again need to check the students **Cases.**
* If you are satisfied a New Case is required then you will need to set a new Case up from here by clicking on the plus ‘+’ symbol.



**If you think the email relates to an existing case for this student, make a note of the Case.**

**Next, you will need to set the email regarding this case.**

1. **Setting the Email against the Case.**
* In both above scenarios, once you have the case set up, or have found the existing case, navigate back to the Email.
* Scroll down to the bottom of the email to locate the **Regarding** field
* Click on the **Look Up**
* Click on **‘Look Up More Records’**
* A ‘**Look Up Record’** window will appear.



* You will need to change the ‘**Look For’ to Case**. The ‘**Look in’ will automatically update to ‘Case Lookup View’**
* You can change the **‘Look In’** view to narrow down your search. There are various views available e.g. ‘My Active Cases’



* In the search box you can search for the Students Name (remember to use wildcard), or Student ID or Case Number which you want to attach the email to.
* Search results will then display.



* **Tick** (in the left hand column) the case you wish to **‘Add’** the email to.
* Click **Add.**
* Automatically you will see that the **Regarding** field is now populated with the case you selected (displayed with a spanner)



* If you click on to the Case Name you will be taken to the Case & you will see the email has attached.