Creating a Case in CRM for Campus Solutions
(Student Financials) Departmental Items

1. Open Service Center
2. Add Case
3. Fill in:

   Case Type: Support Request
   Category: Student Financial Services
   Specialty Type: Departmental Support
   Detail: (Select most appropriate detail description)
   Case Priority: (Select most appropriate priority)
   *Problem Summary: Fill in summarized explanation
   Problem Details: Please be specific, include all necessary information to include student account information, item types involved, dates, etc.

*Screen should look similar to this:*