

# CUSTOMER RELATIONSHIP MANAGEMENT

# CRM

# USER GUIDE



## **Digital Services Team**

Amy Brown 616961  
Karin Paddock 616333  
Sue Garwood 616312

[DigitalServices@eastcambs.gov.uk](mailto:DigitalServices@eastcambs.gov.uk)

Please contact us for any enquiries 😊

# CRM User Guide

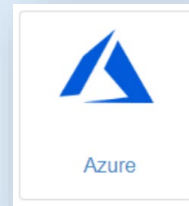
## Logging in



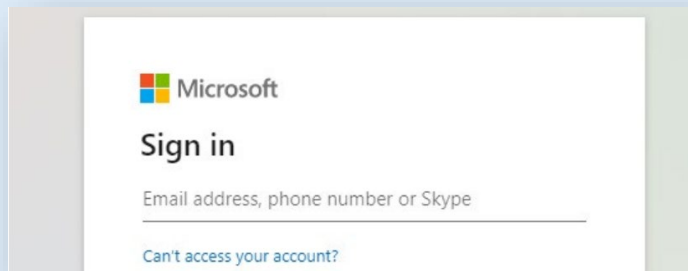
Double-click the CRM icon on your desktop.



Use the Azure login – it signs you in via Microsoft 365.



If prompted for login or it fails, contact IT Support.

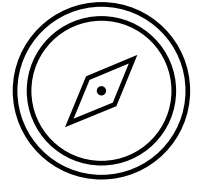


For all other enquiries or support, please contact us:

[DigitalServices@eastcambbs.gov.uk](mailto:DigitalServices@eastcambbs.gov.uk)

We are more than happy to help!

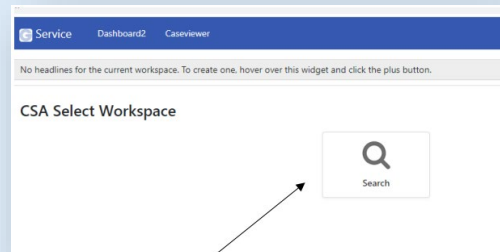




# Navigating the workspace

## Your workspace

Use the search for cases or customers. Search using address, case reference, name, email and phone number.



Go to Dashboard2.

You'll see at least 4 main tabs depending on your team

### Your open tasks:

- cases currently assigned to you
- unassigned cases for your team
- reassigned cases from other teams

**Your closed tasks** are all cases and their stages that are assigned to you and any teams you are in.

**'Team name' all open** – All open cases for your team

**'Team name' all closed** – All closed cases for your team

Tip: Click column headers to sort by date. Use the Reset button to remove filters.

## Managing cases



You can view or continue a case:

**View** – Look at the case without editing it.

**Continue** – Open the case to take action or reassign.

To assign a case that is unassigned or awaiting allocation, click continue and assign to yourself or someone else.

### Open

To assign this case to another user or team, please use one of the drop down lists below.  
Please only assign to a specific user OR to a team - if you attempt to use both, the team will take priority.

Case Summary: Case summary will appear here

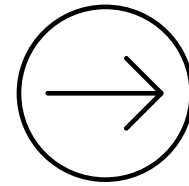
Re-assign to different staff member

Re-assign to a different team

Otherwise, this will be assigned to  ✓

Reference: FS-Case-712099543

**Note:** If both a team and user are selected, the case will go to the team.



# Processing a case

1. Select continue on your assigned case
2. Review the customer details
3. Fill in the required fields on the Process Case tab



Case resolved?

Select Yes to close the case

Select No if more action is needed – it will stay in your list

Case Resolved? \*

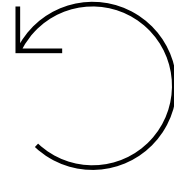
Yes No

Resolution details:

Add a clear message in Resolution details for customer.

Customers can track the case and may respond if they're unhappy. The case will then return to your dashboard.

Note: Closed cases cannot be reopened.



## Reassigning a case

If you need to reassign a case that has already been assigned to another user, please do the following:

1. Take note of the CRM case number
2. Open the CRM Reassign icon on your desktop



3. Login through the Azure door
4. Enter the CRM case number

Tasks Manager Amy Brown

Tasks List Tasks Locks Case List

Database ID	Case Reference	Case Name	Stage	Assigned User	Assigned Group	View/Edit
<input type="text" value="Search Database ID"/>	<input type="text" value="FS-Case-713239481"/>	<input type="text" value="Search Case Name"/>	<input type="text" value="Search Stage"/>	<input type="text" value="Search Assigned User"/>	<input type="text" value="Search Assigned Group"/>	<input type="button" value="Search"/>
5m6f88681dfb0caa83	FS-Case-713239481	Additional Wheeled Bin - Request or Cancel	Awaiting Delivery/Collection		ECSS Admin	<input type="button" value="View Task"/>

Show  entries < Previous Next >

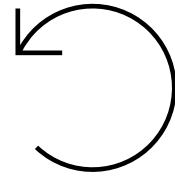
5. Click on the eye icon, then Modify Task



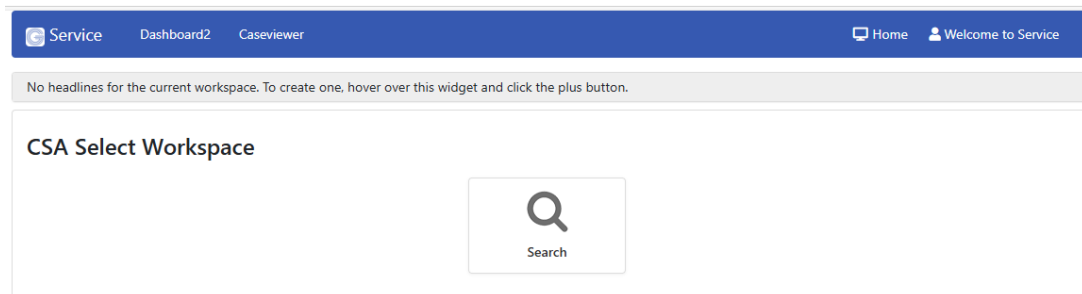
6. Select either a user or a team and click Update Task

If you need help with this, please give us a call.

# Search feature



Tap the magnifying glass icon located on the home screen to start a search.



This site is powered by govService | Privacy Policy

You can look up:

- customer profiles
- case history relevant to your department

The search tool is highly flexible – try entering names, phone numbers, addresses, or other key details to quickly find what you need.

If you need help with anything, please give us a call 😊

Amy Brown 616961  
Karin Paddock 616333  
Sue Garwood 616312