FSU Service Center Activities
Adding a Note to a Case

Overview:

Understanding How to Add a Note to a Case

This topic demonstrates how to add a note to a case in order to communicate with the customer, provider group, and interested parties, if selected. Cases must be in Open status in order to add a note.

Procedure

Scenario:
In this topic, you will learn the steps to add and email a note from an open case.

Key Information:
Viewing Worklist for a Provider Group
**Step** | **Action**
--- | ---
1. | Within an open case, click the **Notes (0)** tab.

2. | Enter the appropriate information into the **Subject** field.

3. | Describe the problem in the field **Details**.

4. | Click the **Visibility** list.
   
   For the purpose of this example, select **All**.

**NOTE:** If **Visibility** set to Internal means the note can only be viewed by agents. If **Visibility** is changed to All, notes can be seen by customers and agents.
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<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
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| 5.   | Click the **Note Type** list.  
For the purpose of this example, select **Comment**.  
**NOTE:** Note Type, and the fields under **Contact Information** are optional.  
**Comment** |
| 6.   | Click the **Apply Note** button.  
**Apply Note** |
| 7.   | Click the **Save** button.  
**Save** |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
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<td>8.</td>
<td>Click on the <strong>check box</strong> under <strong>Select</strong>.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Email</strong> button.</td>
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Step 10. Select the appropriate email address for the Agent, Provider Group or Customer.

For the purpose of this example, click the check box to select the customer **CRM SELFSERVICE**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
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<td>11.</td>
<td>Click the <strong>Send</strong> link.</td>
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<td>Step</td>
<td>Action</td>
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<td>12.</td>
<td>Click the <strong>Home</strong> link.</td>
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| 13.  | **Congratulations!**  
You have completed this topic.  
**End of Procedure.** |