Creating a Case Message

This guide will cover:

- Manually creating a case message for documenting interactions with prospective students.

Step One

To open a case that was created, click on the Cases tab of the record and click on the Case Subject or Case ID showing in the list.

From here you can edit the case or create a new case message.

Step Two

Click

The Contact will default to the current contact. The Case Subject will automatically default to the case in which the message is being created. Sent By and Case Message Owner will default to the current user.

Provide a Case Message Subject.

Select a Message Type.

Select a Channel

The Sent Date/Time will default to the current time (24 hour format).

Enter the Message Content.