Creating a Case

The Cases module in Radius keeps a record of all interactions that a contact has with the institution (outside of applications, event registrations and the marketing module). A case is automatically created when someone fills out an inquiry form over the web, or when an inbound email is received. The user can manually create a case for a contact, and that function will be the primary use of this module for University of Cincinnati Radius users, as it is extremely helpful for phone and face-to-face interactions.

For example, if an admissions counselor has a phone conversation with a prospective student, the admissions counselor would create a case related to the student to document what was discussed in the conversation. That record can be located later by other Radius users to see what has already been discussed with the student. Within a case, a user can assign a status, a priority and change the case owner if needed. A user may create and assign Tasks related to the Case to signal that further follow-up is needed. Further communication can be added to the case if it’s related, so a thread of messages can be built to track interaction history with a prospect, allowing users to see total communication streams.

Clicking on the Case module button in the toolbar will cause a drop-down to appear that will include the Cases button. Clicking on this takes the user to the Cases List View. The user will then see a variety of fields related to each Case. Clicking on the Case ID or Case Subject will give access to the specific case itself.

The user will see any messages or comments regarding a given Case at the bottom of the layout. Within each case, the user has the ability to add or respond to messages, add comments and create Tasks.

Step One

To access related cases for a contact, you will first need to load a contact record.

Click .

Select Cases from the list.

Step Two

Within the Cases tab of the contact record, click New Case.
The Primary Contact will automatically pre-populate with the contact’s first and last name. The Case Owner will also pre-populate to show the user’s name.

Provide a Case Subject.

Provide this case with a status.

Assign a priority status.

Assign a source.

Enter a description that will provide a brief overview of what this particular case concerns.

Once all information has been entered, click **Save**.