Smarter technology for all

Lenovo

Cases – MSD365

Lenovo Global Product Education

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Contents

- What is a Case?
 - ➤ The five **Business Process Flow** stages for Cases in the MSD system.

Learning Objectives:

- Create a New Case.
- Complete tasks in the Identify stage.
- Complete tasks in the In Progress stage.
- Complete final tasks in the Solution
 Provided stage.
- Make a copy of an existing Case to save time and effort.



What is a Case?

All customer service requests begin with a Case record

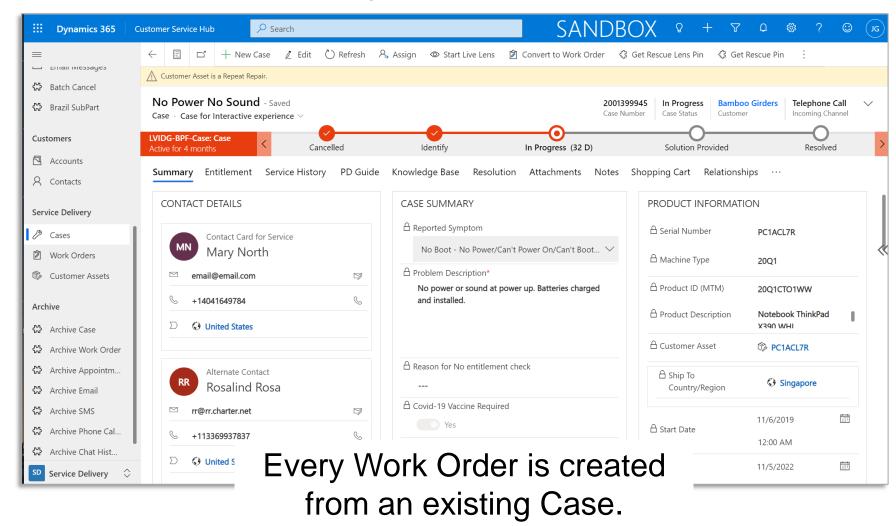
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What is a Case?

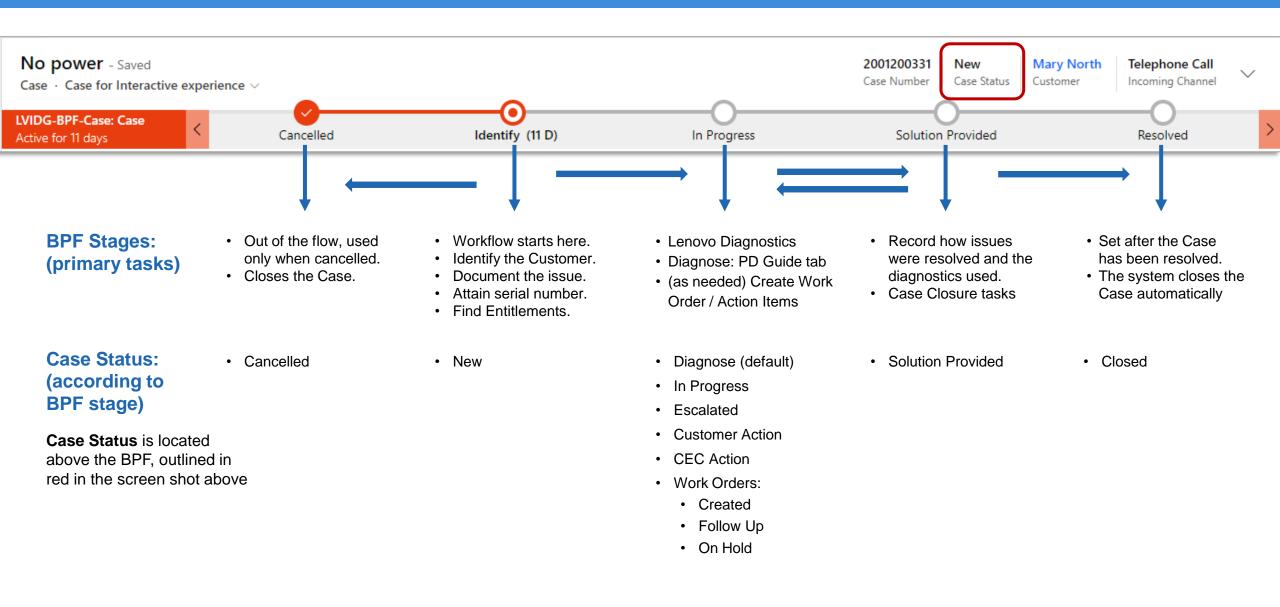
Each service request received from customers begins with a Case.

Conceptually, when you create a Case, customer data is read from a **Contact** record in MSD, a customer's organization data is read from an **Account** record, and equipment data is read from a **Customer Asset** record.

If any, or all three of these, are not in the MSD system, that poses no problem to creating a Case. In fact, you can create Contact and Customer Asset records, if needed, while creating a Case.



Case Business Process Flow (BPF)

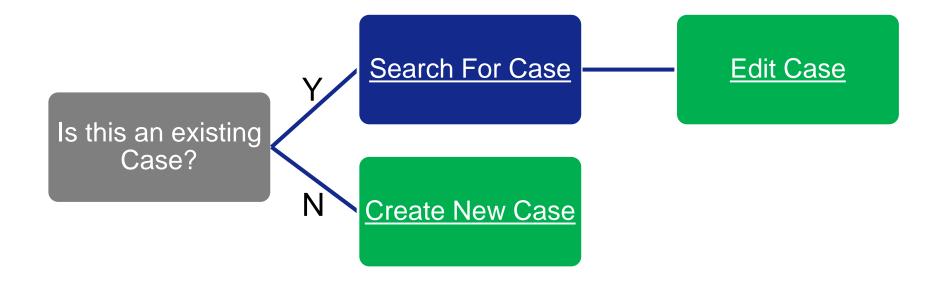


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Case Creation Scenarios

Click the process decision tree links to direct you to the section you need.



Opening and filling out the **New Case** form

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Eight Fields

The Next Six Fields

In the Third Column

<u>Create the</u> <u>Case Record</u>

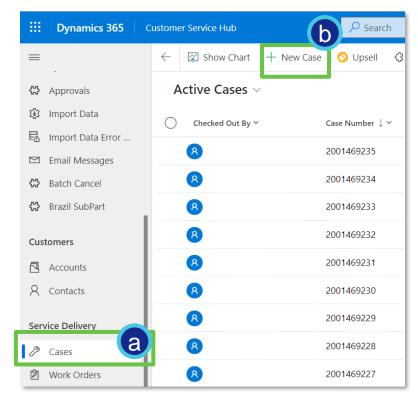
Edit a Case

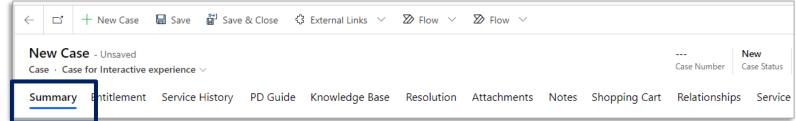
- A Case can be created from a variety of incoming channels, such as email, e-ticket, chat, or phone; on the Service History tab of a Contact, Account, or Customer Asset record; or on any Case View (shown on the right).
- In a few cases, such as with touchless e-ticketing, the system creates the Case automatically. But this section demonstrates how to create a Case manually.

Here is a quick way to open the **New Case** form:

- a. In the Navigation Menu, click the **Cases** entity.
- b. On any View page, go to the Command Bar to click **New Case**.

The **New Case** form opens to the **Summary** tab, ready for you to start entering information.





In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

Create the Case Record

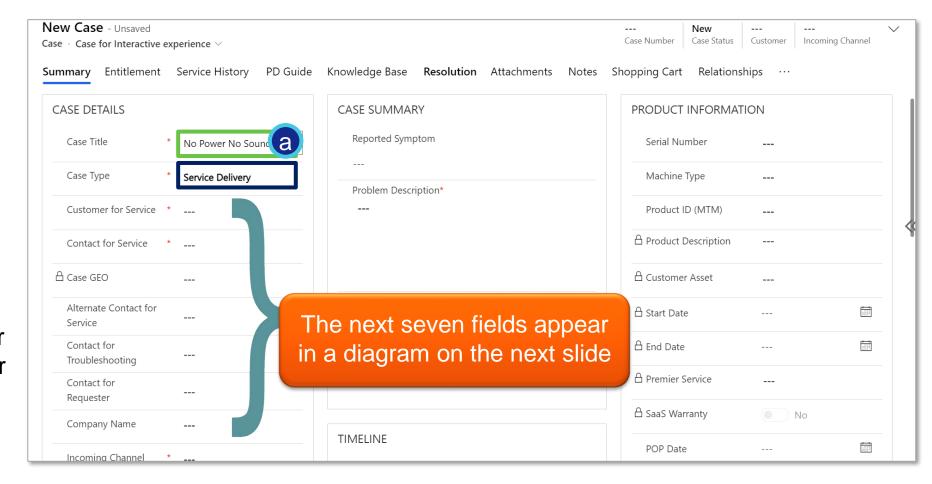
Edit a Case

Now you fill out the form. The first step is to provide a **Case Title**.

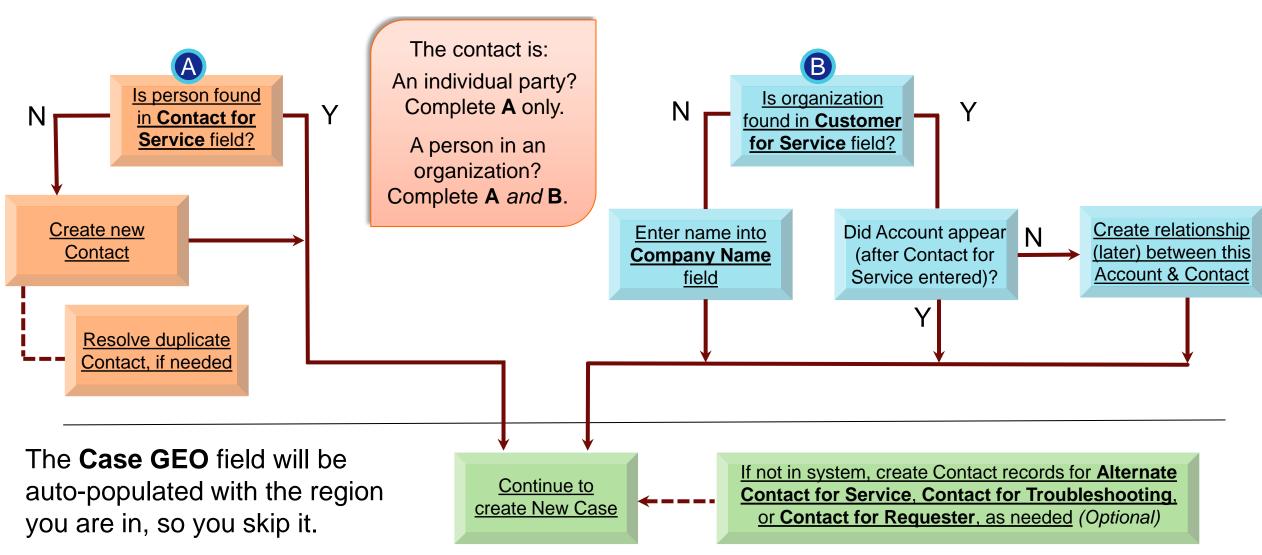
a. In the first field, enter a brief summary of the problem. This becomes the name of the Case, so be brief and unique.

The next required field, **Case Type**, defaults to *Service Delivery*. Leave this, as is, for contact centers and customer carry-in centers.

This procedure continues on the following slides



The next seven fields have some dependencies. Click a link in a box to jump to a particular slide you need.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

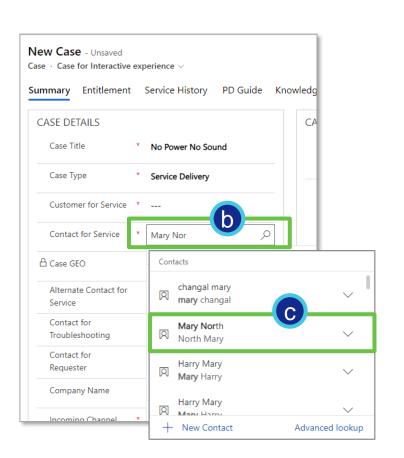
In the Third Column

<u>Create the</u> <u>Case Record</u>

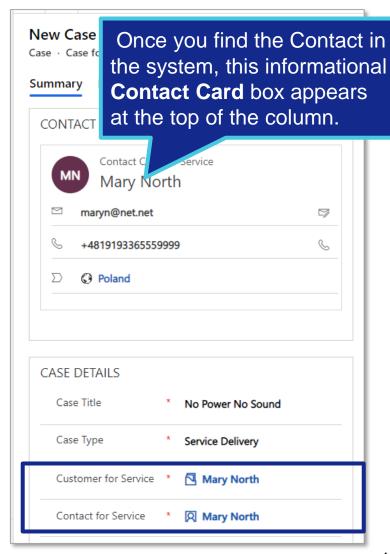
Edit a Case

We recommend you skip the Customer for Service field and complete the **Contact for Service** field first:

- b. Begin entering the name, email, or phone number of the one who is contacting you. As you type, possible matches appear.
- c. When you see the name, click it.
 - If the Contact already has a relationship with an Account, the Account name appears in Customer for Service.
 - If the Contact does not have an Account relationship, then Customer for Service repeats the Contact's name.



Contact not found? Click here to find out what to do.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

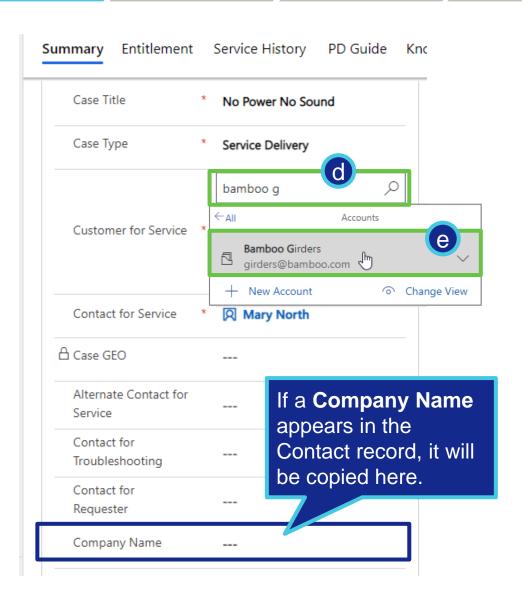
First Two Fields Next Seven Fields The Next Six Fields In the Third Column

Create the Case Record

Edit a Case

Look now back up at the **Customer for Service** field.

- In a business-to-customer situation, you leave the customer's name here.
- In a business-to-business situation, you reference the Account record (if it does not already appear there):
 - d. Begin entering the name, email, or phone number of the person's Account record.
 As you type, possible matches appear.
 - e. When you see the name, click it.



If the Account exists, but it did not appear with the Contact for Service, consider creating (later) a <u>Relationship</u> between the Account and Contact.

If you do not find the Account, contact centers do not create new Accounts. Instead, leave the Contact's name in Customer for Service and then enter the Account name in the Company Name field.

Some regions also have you create an Escalation for this situation later.

Remaining Contact Fields

Create a New Case

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields

The Next Six Fields

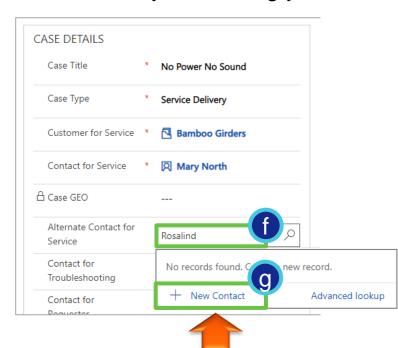
In the Third Column

<u>Create the</u> <u>Case Record</u>

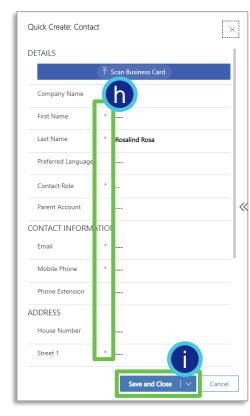
Edit a Case

The next three fields all work the same. To the system, these are optional fields, but follow local practices.

- Alternate Contact for Service is of particular importance to Onsite and Depot services.
- Contact for Troubleshooting is usually not the asset owner, especially in B2B services. This often is the IT
 person a technician contacts on an onsite visit.
- Contact for Requester is the one directly contacting you on behalf of the Contact for Service.
- f. Enter the name, email, or phone number of the person to find their Contact record. If found, you are done with this field.
 - If duplicate records are found, click here.
- g. If this person does not have a Contact record in the system, click + New Contact to open the Quick Create Contact panel.



- h. In the Quick Create Contact overlay panel, complete at least the mandatory fields.
- Click the Save and Close button.



Next Six Fields (1 of 4)

Create a New Case

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

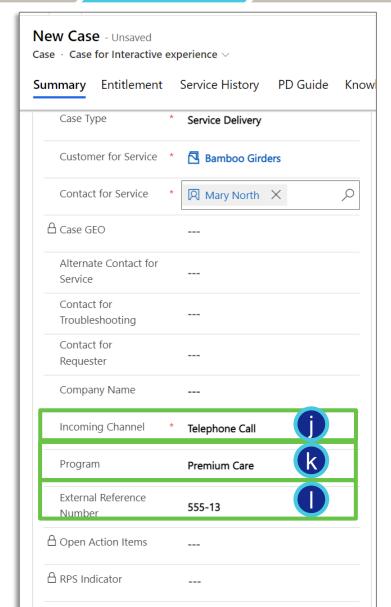
<u>Create the</u> <u>Case Record</u>

Edit a Case

Continue filling out the form:

- j. (mandatory) Scroll down to select the **Incoming Channel** to specify how the customer is contacting you.
- k. (optional) In the **Program** field, select a program value that is most appropriate based on the product, warranty, and entitlement that you support.

This field affects the field options you see later in this Case and Work Orders created from this Case.



I. (optional) External Reference
Number is a free-text field where
you can cross-reference a record
on a different system. If a
customer issue began on a
different system and it now will be
completed on the MSD – this field
points to the number used on the
original system to identify this
issue.

Next Six Fields (2 of 4)

Create a New Case

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

Create the Case Record

Edit a Case

Continue filling out the form, now at the top of the middle column:

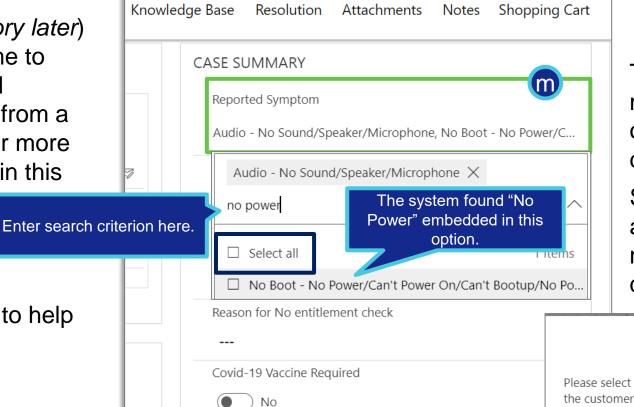
m. (optional now; mandatory later)
This is a convenient time to
complete the **Reported Symptom** field. Select from a
drop-down menu one or more
problems encountered in this
customer issue.

You can type into this field to help narrow the list.

Continues on next slide...

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At the top of the middle column:



The Select All option is a mandatory Microsoft option that cannot be deleted.

Selecting this will pop-up a "select only the most relevant symptoms" dialogue box.

Please select only the most relevant symptoms, reported by the customers.

OK

15

 \times

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

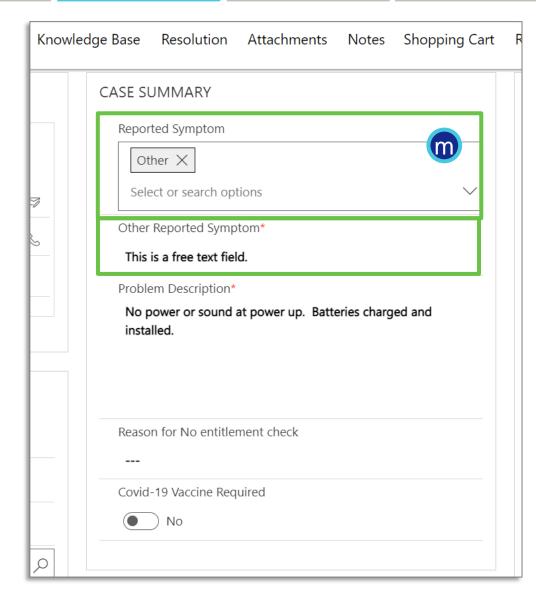
Create the Case Record

Edit a Case

If you select *Other* in the **Reported Symptom** field, a new field will appear called **Other Reported Symptom.**

This free text field continuously scrolls to the right. There is a maximum size here of 100 characters.

Your input may be considered as a future addition to the options in the **Reported Symptom** drop-down menu.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

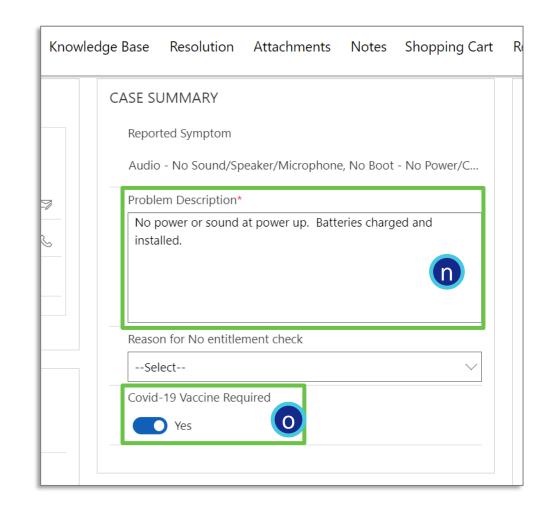
First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

<u>Create the</u> <u>Case Record</u>

Edit a Case

- n. In the middle column, complete the **Problem Description** field. Here you can elaborate on the problem (this scrolling text box supports up to 3000 characters).
- o. (optional) Move the Covid-19
 Vaccine Required slider to Yes
 if the customer wants
 a Covid-vaccinated technician
 to come on site, should an
 Onsite (ONS) Work Order be
 required for repairs.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

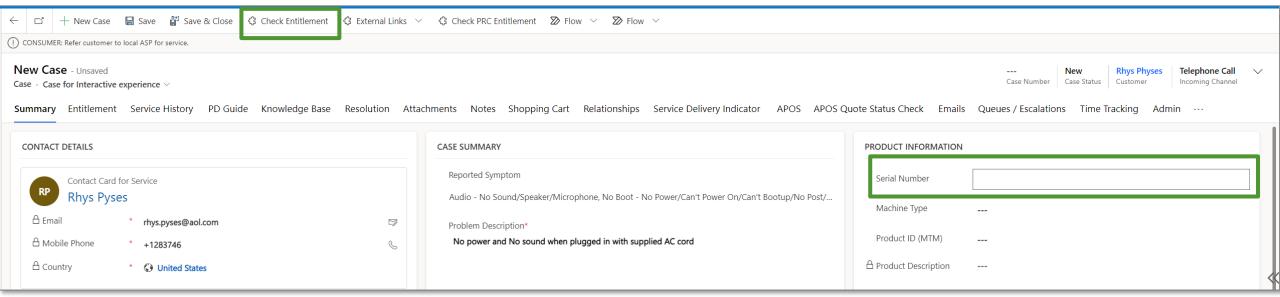
First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

<u>Create the</u> <u>Case Record</u>

Edit a Case

At the top of the third column is the Product Information section:



(optional) You can run an entitlement check now, before you save the case for the first time.

Enter the **Serial Number** and then click **Check Entitlement** in the Command Bar.

See Enter Serial Number slides in the next section for complete details.

If you **Check Entitlement** before entering the customer data as shown in the previous slides, the Customer Asset will be created but will not be complete until all customer data is entered.

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

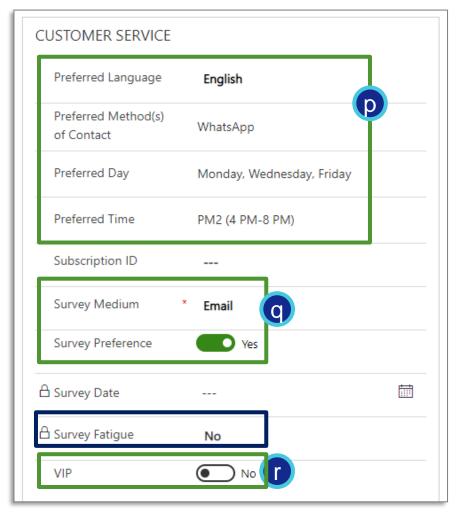
First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

Create the Case Record

Edit a Case

Further down the third column:



In the third column, scroll down to the **Customer Service** section. Then:

- p. (all are optional) These top fields are auto-populated from the Contact record. Otherwise, you have the option of filling in or correcting them.

 If the second field, **Preferred Method of Contact**, has *WhatsApp*, then, after the Save, you will must provide the number to contact the app.
- q. (*mandatory; Email default*) Use the pull-down menu to select the **Survey Medium** (Email, SMS, or WhatsApp). If no survey should be sent, toggle the **Survey Preference** field to *No*.

Two details about these fields:

- If you select WhatsApp for survey medium, a new field, WhatsApp
 Phone Number, appears. Enter here the number to contact the app.
- If **Survey Fatigue**, a locked field, shows *Yes*, then this customer has had a survey in the last 30 days. A *Yes* in this field overrides a *Yes* in the **Survey Preference** field and no survey will be sent.
- r. (optional) If known, you can set the **VIP** field. Did the customer mention their position? If so, is the customer's organization or job title understood as influential? For example, are they are politician, a Government authority, in a senior position in the private sector, Police, social activist, or social blogger?

Open the New Case Form

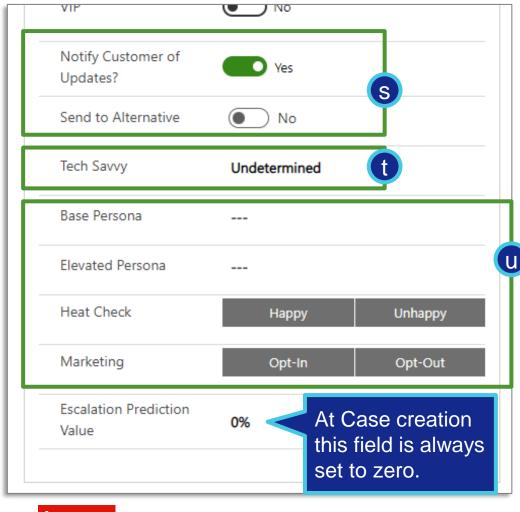
First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

Create the Case Record

Edit a Case

At the bottom of the third column:



s. (*optional*) Should the system **Notify Customer of Updates**? If Yes, these messages will be sent using the customer's preferred method of contact.

Then, if updates should be sent, should they go to the customer – or to an alternate destination? If the latter, then toggle **Send to Alternative** to *Yes*.

One of two fields determines the alternate destination: the person named as the **Alternative Contact for Service** in the first column, or, if there is not a person in that field, then the system looks in the Customer's Contact record for the value in the **Secondary Email Address** field.

- t. (optional now but mandatory later; default of Undetermined) If you can tell how **Tech Savvy** the customer is (or isn't), you can select a level from a menu. It is often too early to gauge this, so you can save this field for later.
- u. (all optional) The next four fields all describe the customer at the time of Case creation.

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

Create the Case Record

<u>Edit a Case</u>

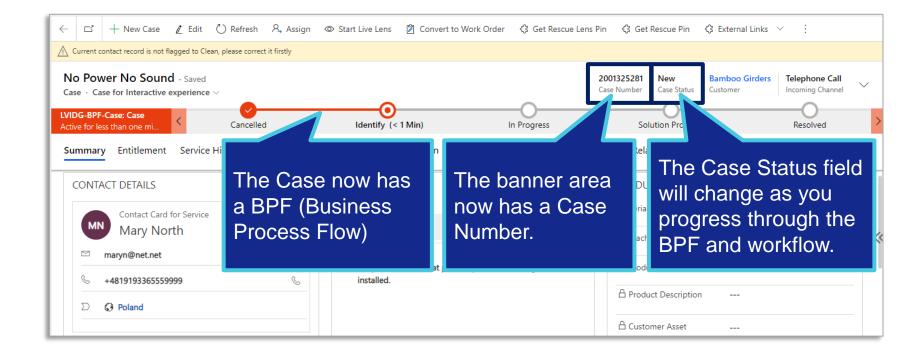
With all the mandatory and key optional fields complete, you are ready to create the Case record.

r. In the Command Bar click **Save**.

After a few moments the system completes creating the Case record.



You can Save a record by clicking Save, Save & Close, or by pressing Ctrl + S on your keyboard.



Open the New Case Form

First Two Fields Next Seven Fields The Next Six Fields

In the Third Column

<u>Create the</u> <u>Case Record</u>

Edit a Case

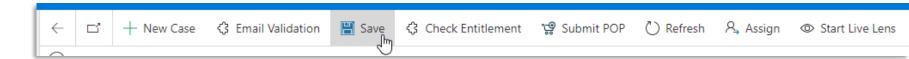
To process the Case through to completion, you complete various edits. Remember

that to edit most fields in a Case, you must first click the **Edit** button in the Command Bar.



This puts the Case into *Edit mode* where the system:

✓ Changes the options in the Command Bar so now **Save** appears as an option.



- ✓ Checks out the Case to you so only you can edit it (until you Save, which checks the
 record back in. Now anyone else can check the record out to make edits to it.).
- ✓ Removes the lock icon from editable fields.

Complete Tasks in the Identify Stage

Includes checking Entitlements

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In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

(opt) Open panel

Enter the Serial Number

<u>Check</u> <u>Entitlements</u> If No Entitlement Check

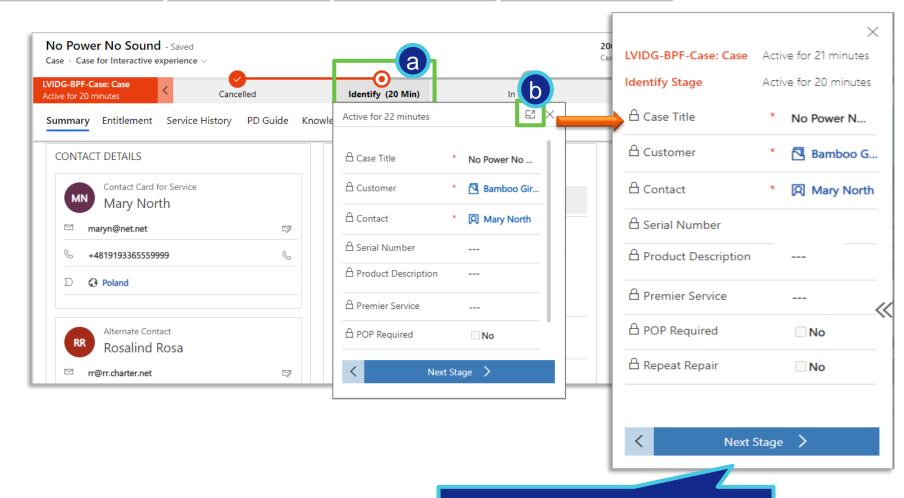
Handle Alerts

Move to In Progress

(*Optional*) To help you complete fields in the Identify stage:

- a. Click the bullseye in the BPF's **Identify** stage.A pop-up form appears.
- b. You can pin the pop-up form by clicking the □ pin-it icon.

The pop-up moves to the right as an overlay panel, to assist you in completing key fields.



The pop-up form is now pinned here as an overlay panel.

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

<u>(opt) Open panel</u>

Enter the Serial Number

<u>Check</u> <u>Entitlements</u> If No Entitlement Check

Handle Alerts

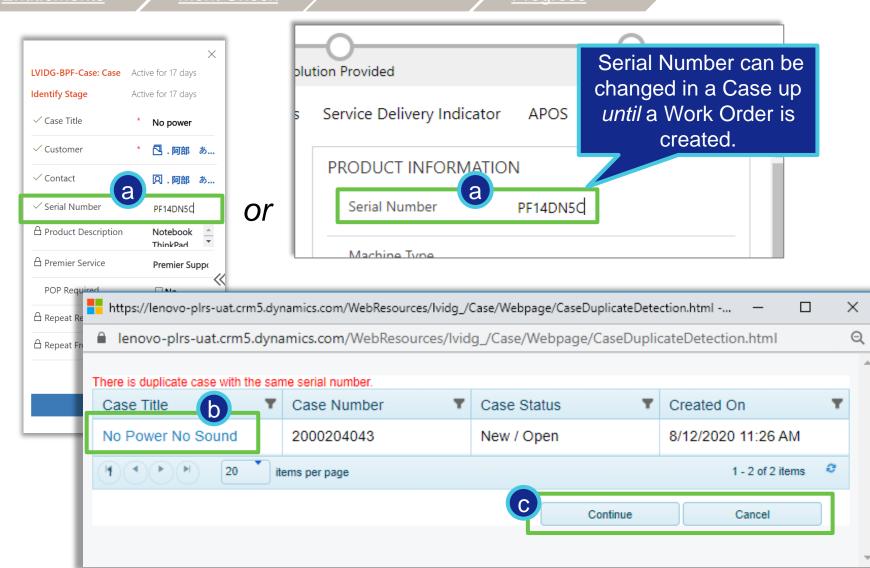
Move to In Progress

In Edit mode:

a. Enter the serial number of the customer asset either in the panel (shown) or in the top field in the third column of the record.

If this Serial Number is currently used in another Case, a pop-up window automatically opens.

- b. Click the Case Title link and read the existing Case to verify that there is not already a duplicate case for this issue.
- c. Depending on what you find, click either Continue or Cancel.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

<u>(opt) Open panel</u>

Enter the Serial Number

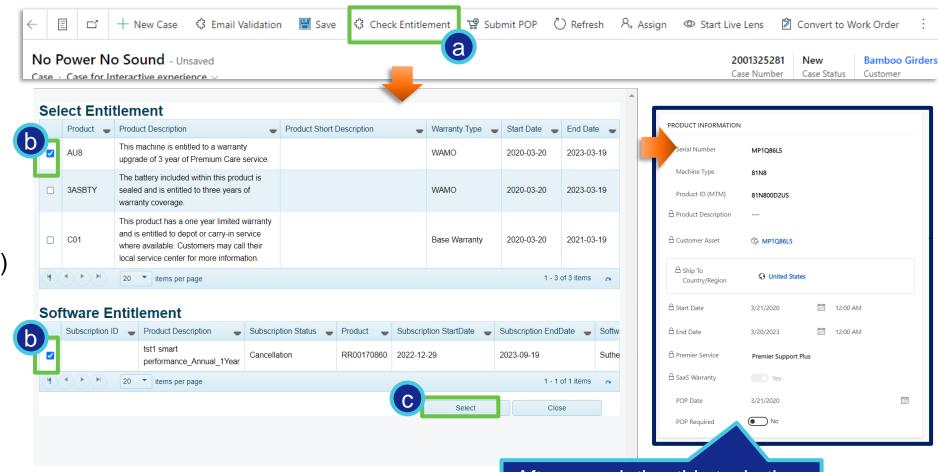
Check Entitlements If No Entitlement Check

Handle Alerts

Move to In Progress

Now that you have the serial number in the system you now conduct an Entitlement Check:

- a. Click **Check Entitlement**.
 The **Select Entitlement**window opens. (Click here
 if this is a PRC asset.)
- b. Check the box in the first column for the entitlement(s) to be used for this Case for both the Hardware and Software Entitlements (if any).
- c. Click Select.



After completing this task, the product details appear in the **Product Information** section.

In the Identify
Stage

entitled.

In the In Progress Stage

In the Solution Provided Stage

CUSTOMER SERVICE

△ Preferred Language

Preferred Method(s)

of Contact

△ Preferred Day

☐ Preferred Time

☐ Subscription ID

A Survey N

☐ Surv

Copy an
Existing Case

English

21081700318

Email

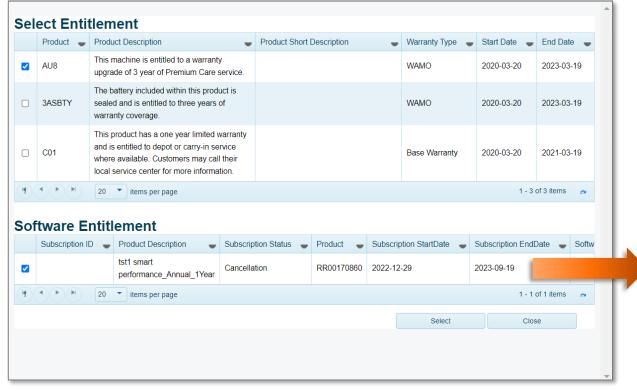
(opt) Open panel

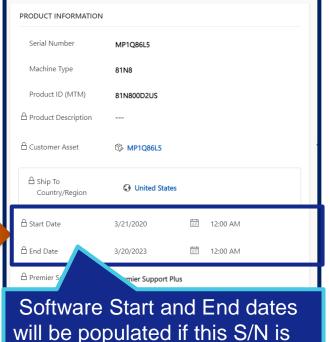
Enter the Serial Number

Check Entitlements If No Entitlement Check

Handle Alerts

Move to In Progress





Software Subscription ID will appear in the Customer Service section.

- You are prompted to complete this check if you forget.
- If there's no warranty, the system opens a No Warranty Found message.
- If all warranties expired, the customer can submit a POP to extend the warranty. Once approved, and warranties updated, you can complete another Entitlement Check.

In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

(opt) Open panel

Enter the Serial Number

<u>Check</u> <u>Entitlements</u> If No Entitlement Check

Handle Alerts

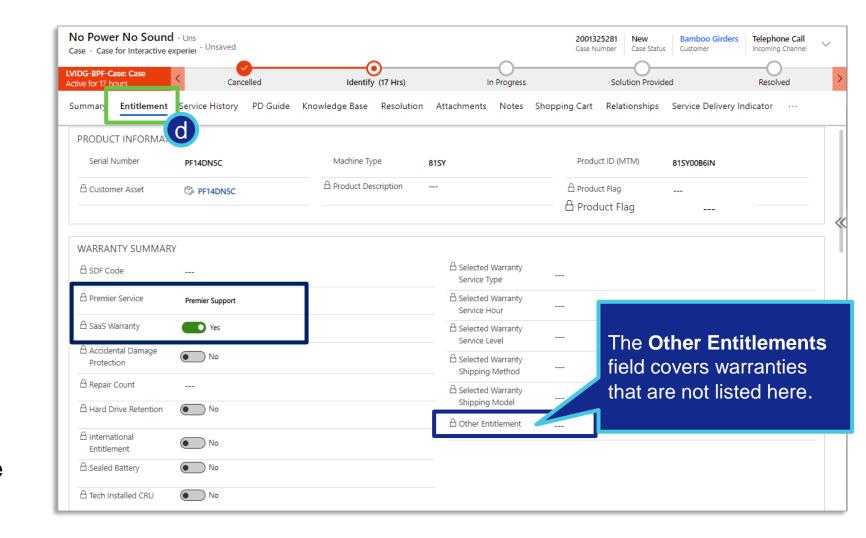
Move to In Progress

To complete the Entitlement Check (cont'd):

d. For additional information, open the **Entitlement** tab.

As examples of the data on this page:

- A field such as Premier Service
 defines the level of service
 available to this serial number,
 if any (such as Premier Support,
 Premium Care, or Legion Ultimate
 Support).
- A field with a slider (such as SaaS Warranty) toggles to Yes when the associated warranty is available.



If No Entitlement Check

Create a New Case

In the Identify
Stage

In the In Progress Stage In the Solution
Provided Stage

Copy an
Existing Case

<u>(opt) Open panel</u>

Enter the Serial Number <u>Check</u> <u>Entitlements</u> If No Entitlement Check

Handle Alerts

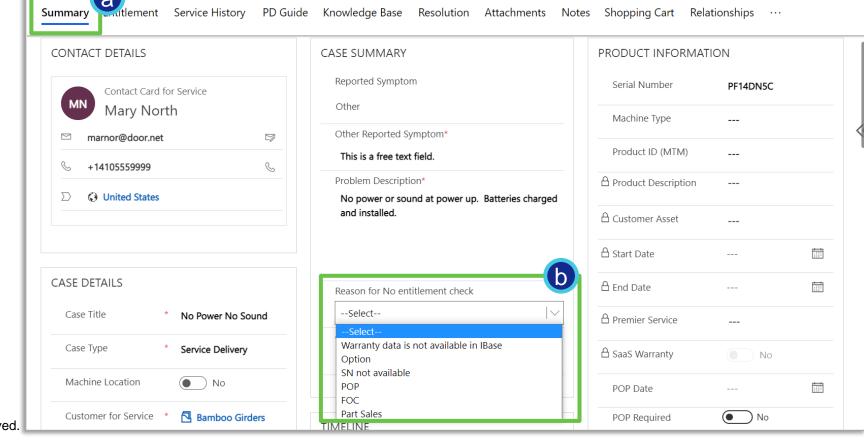
Move to In Progress

There are situations where an Entitlement Check is not needed (such as labor-only requests), or, rarely, when the Entitlement Check feature is not working properly. If you are going to go forward without an Entitlement Check, you *must* select a reason why.

In Edit mode:

- a. Be in the **Summary** tab.
- b. Go to the middle column. In the Reason for No entitlement check field select the reason for not having the check done.

If you forget to do this, an error message appears when you try to move the BPF to the next stage.



In the Identify
Stage

In the In Progress Stage In the Solution
Provided Stage

Copy an
Existing Case

(opt) Open panel

Enter the Serial Number

<u>Check</u> <u>Entitlements</u> If No Entitlement Check

Handle Alerts

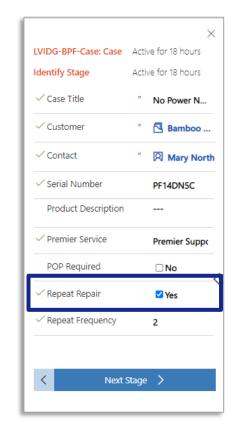
Move to In Progress

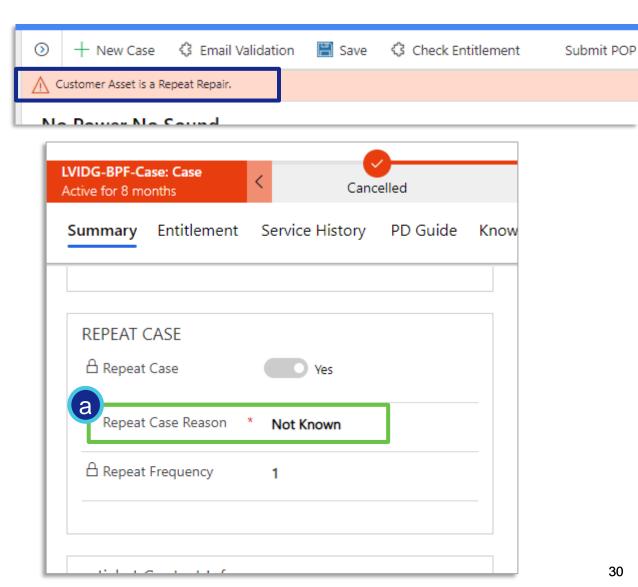
If you see an informational Alert telling you that

the Customer Asset is a Repeat Repair (as well, the bullseye drop-down shows Yes at Repeat Repair, as shown), the MSD found that this serial number has been serviced recently (the duration is set by country). In Edit mode, scroll down the first column of the record to the Repeat Case section.

a. Although the **Repeat Case Reason** field is usually filled by the default of *Not Known*, it is best practice to select the ac

is best practice to select the actual cause. Also, being a mandatory field now, it cannot be empty.





Handle Alerts (2 of 2)

Create a New Case

In the Identify Stage

In the In Progress Stage

In the Solution **Provided Stage**

Copy an **Existing Case**

(opt) Open panel

Enter the Serial Number Check Entitlements

If No Entitlement Check

Handle Alerts

Move to In Progress

If you see an Alert telling you that the current Contact record is not flagged to Clean, you are expected to

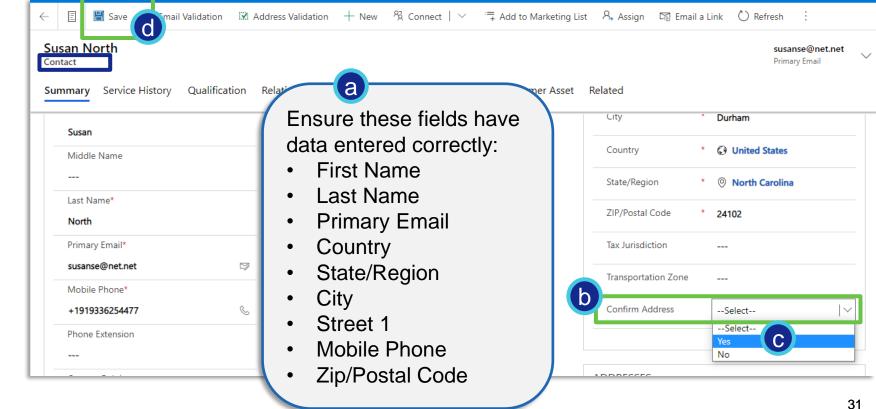
verify records in the Contact for Service's **Contact** record.

Press CTRL as you click the Contact's name in their Contact Card. The person's Contact record opens in a new browser tab.

- a. In **Edit** mode, verify the nine fields listed here all have data correctly entered, such as no fewer than 7 digits for the Mobile Phone field.
- b. Scroll down the third column to Confirm Address.
- c. Open the drop-down menu to select Yes.
- d. Click Save.

You can now close the browser tab that has the Contact record.

Current contact record is not flagged to Clean, please correct it firstly





In the Identify
Stage

In the In Progress Stage In the Solution
Provided Stage

Copy an
Existing Case

(opt) Open panel

Enter the Serial Number <u>Check</u> <u>Entitlements</u> If No Entitlement Check

Handle Alerts

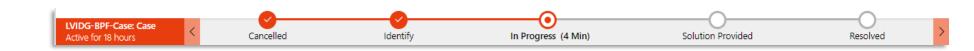
Move to In Progress

You are now at the point when you can manually move the BPF to the In Progress stage.

- a. Click the bullseye at the BPF's **Identify** stage.
 - A pop-up menu appears.
- b. Ensure all mandatory fields are complete.
- c. Click Next Stage.

No Power No Sound - Unsaved 2001325281 Bamboo Girders Telephone Call Incoming Channel Case Number Case Status Customer Case for Interactive experience LVIDG-BPF-Case: Case Identify (17 Hrs) Cancelled In Progress Solution Provided Resolved Active for 17 hours Active for 17 hours Shopping Cart Entitlement Service History PD Guide Knowle Relationships Service Delivery Indicator ... b ✓ Case Title No Power No ... ✓ Customer Bamboo Gir.. ✓ Contact Mary North ✓ Serial Number PF14DN5C Product Description ✓ Premier Service Premier Support POP Required Next Stage >

The bullseye moves to the next stage:



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Complete Tasks in the In Progress Stage

Includes diagnosing the customer's issue

Create a New

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

Complete the BPF Menu

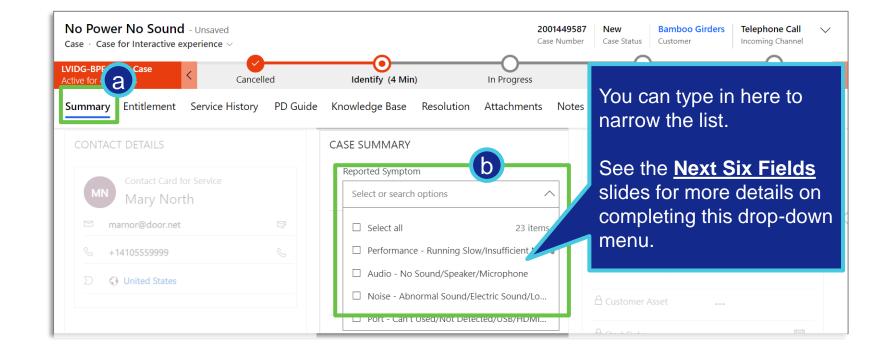
Can You Proceed?

There is a field on the **Summary** tab that has been optional up till now, but must be completed before a Work Order can be made from this Case.

- a. Return to the **Summary** tab.
- b. At the top of the middle column, open the drop-down menu for the Reported
 Symptom field. Select the nearest category.

If necessary, you *can* select multiple categories.

Tip: If none of the categories seem to fit, notice there is an *Other* option you can select.



Create a New

In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics

Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

Complete the BPF Menu

Can You Proceed?

Run Lenovo Diagnostics:

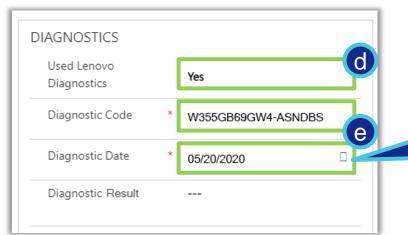
a. Click the **Resolution** tab.



- b. Scroll down to the **Diagnostics** section in the first column.
- c. If you cannot run Lenovo Diagnostics, select No in Used Lenovo Diagnostics. Select the reason in No Diagnostic Reason. Then skip to Step g.
- d. *Otherwise*, run Lenovo Diagnostics. When you receive results, go to **Used Lenovo Diagnostics** to select *Yes*.
 - The fields change in this section.
- e. Enter the **Diagnostic Code** from the test and specify in **Diagnostic Date** when you ran the test.

Continues on next slide





Diagnostic Date filed appears after you input the Diagnostic Code.

Lenovo

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Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

Complete the BPF Menu

Can You Proceed?

Run diagnostics (cont'd):

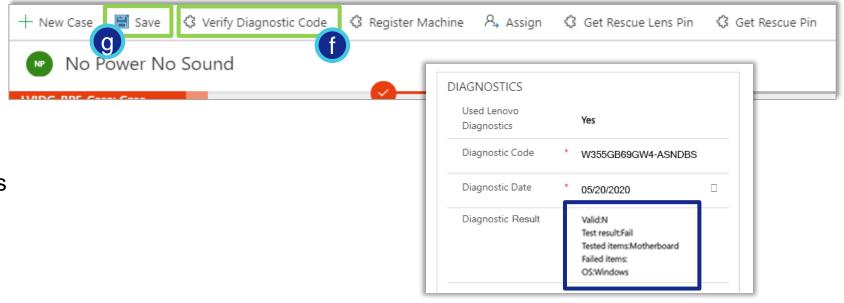
Clicking outside of the box automatically verifies the diagnostic code and fills out the **Diagnostic Result** field.

However, if the system does not to this, there is a manual way to make the results show:

f. In the Command Bar, click **Verify Diagnostic Code**.

Test result information now appears in the **Diagnostic Result** field.

g. Click Save (if exiting).



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

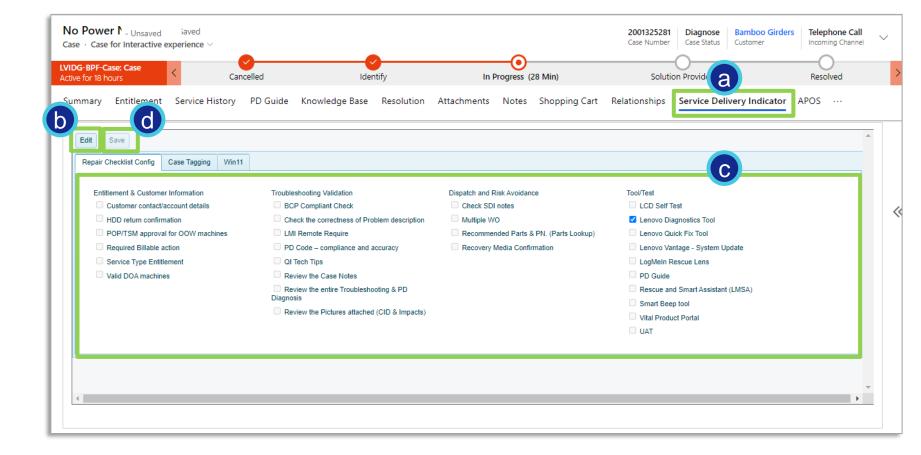
Complete the BPF Menu

Can You Proceed?

You can use the optional* **Repair Checklist** to document tasks you have completed and be alerted to tasks that might help you diagnose the problem. *Follow local desk procedures; in a few locations this is mandatory

- a. Click the **Service Delivery Indicator** tab.
- b. Click the Edit button in the upper left. Ensure you are in the default Repair Checklist Config tab.
- c. Select at least one task you have completed (such as the **Lenovo Diagnostics Tool** in the previous two slides).
- d. When complete, click the **Save** button in the upper left.

Come back to this tab regularly as you complete various tasks.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

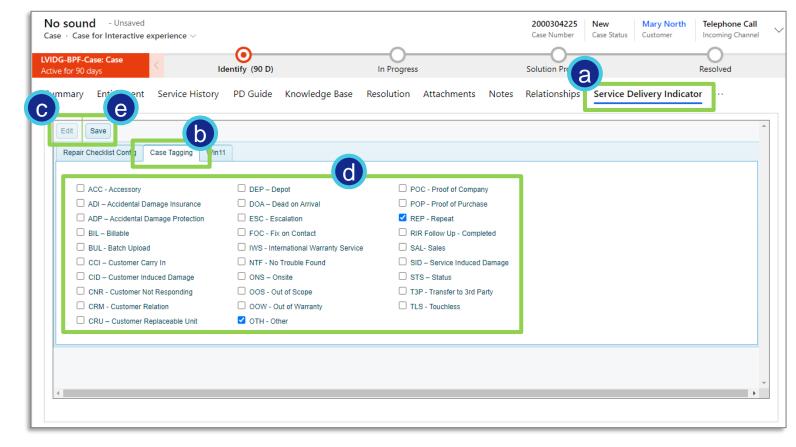
If no PD Code

Complete the BPF Menu

Can You Proceed?

Also on the **Service Delivery Indicator** tab is the optional Case Tagging tab. Instead of burying internally meaningful service acronyms into Case **Titles** (where they confuse customers and, sometimes, vendors), the MSD provides a separate place to tag Cases. This step is optional.

- a. Open the Service Delivery Indicator tab.
- b. Click the **Case Tagging** tab. A list opens with spelled out acronyms.
- c. In the upper left, click the Edit button.
- d. Select at least one tag. If no existing tags fit, there is an *OTH Other* option you can select.
- e. Return to the upper left to click the Save button. You are taken out of this tab and returned to the Repair Checklist Config on this tab.



In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

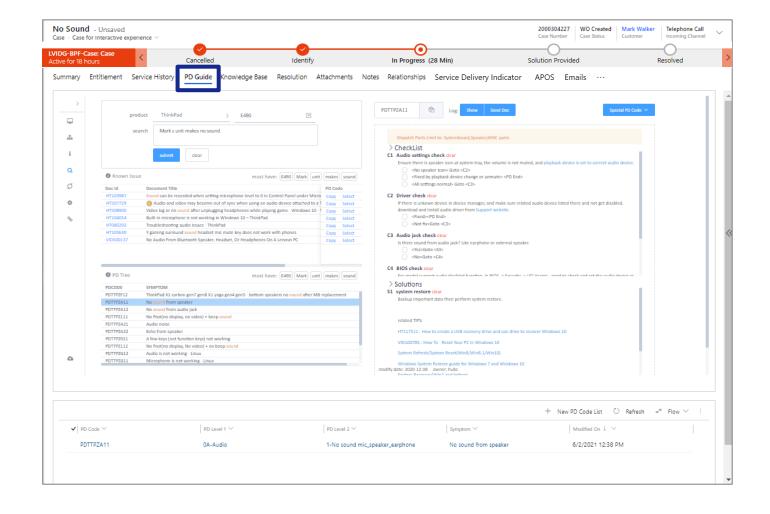
If no PD Code

Complete the BPF Menu

Can You Proceed?

The **PD Guide** tab provides various software tools for determining one or more problem determination (PD) codes, developing an action plan, and determining replacement parts.

Not all groups use the PD Guide for diagnosing problems. For this reason, and that its long list of tasks change regularly, we point you to another course in this series for training on this tab. Please complete **PD Features** (CPRW127).



In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

Complete Reported Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

PD tree

Used Lenovo PD tree

No PD tree Reason

If no PD Code

🕂 New Case 💲 Email Validation 📱 Save 💲 Verify Diagnostic Code 💲 Check Entitlement 📝 Submit POP 💲 Register Machine 🔼 Assign 👁 Start Live Lens

Complete the BPF Menu

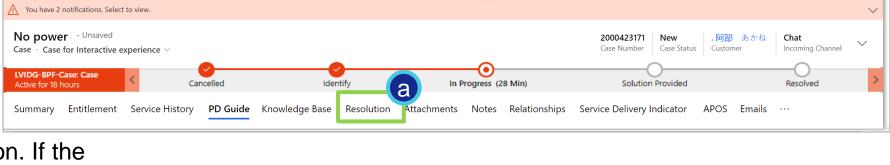
Can You Proceed?

Skip this if you were able to enter one or more PD Codes. If this Case will *not* have a code, you must explain why:

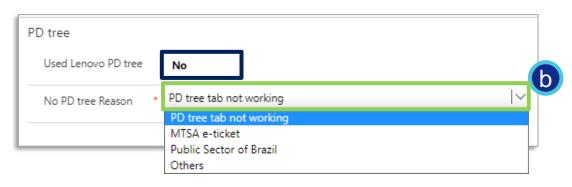
a. Click the **Resolution** tab.

Scroll down to the **PD tree** section. If the **Used Lenovo PD tree** field says:

- Yes, then there is nothing you must do.
 Proceed to the next slide.
- No, then you have not specified at least one PD Code. The next field, No PD tree Reason becomes mandatory.
- b. Select a reason from the drop-down list in this second field.



- or -



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

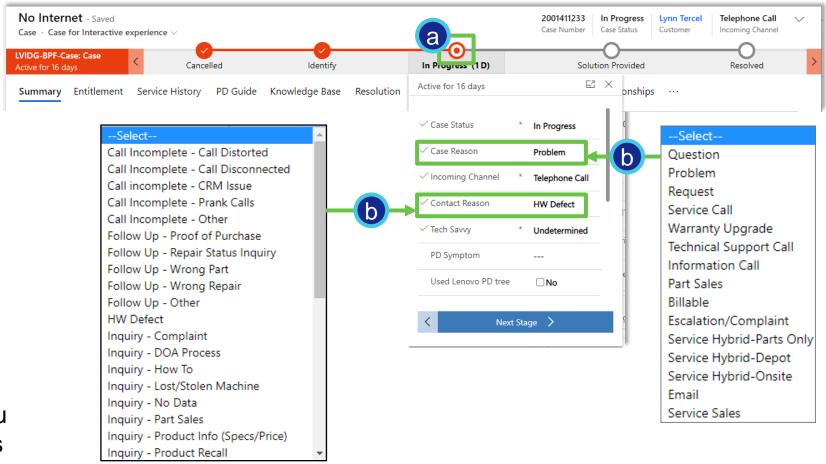
Complete the BPF Menu

Can You Proceed?

Complete the Case Reason and Contact Reason fields in the In Progress BPF stage (these fields are also in the Resolution tab).

- a. Click the **In Progress** stage.
- b. Complete the Case Reason and Contact Reason fields, whether they have red asterisks or not.
- c. To close the panel, either click the X or click outside of the menu.

Important! The system prevents you from creating a Work Order from this Case if you select *Information Call* for the **Case Reason**.



Create a New

In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

Complete the BPF Menu

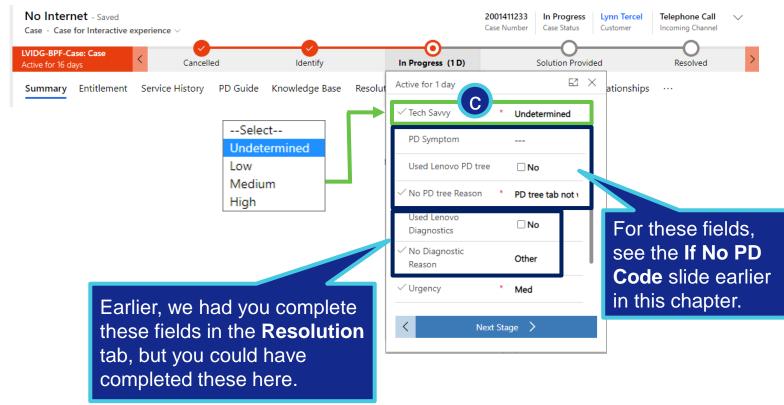
Can You Proceed?

If you scroll down the menu, there are other fields for you to complete.

c. If you have not yet completed
 Tech Savvy, this field is now mandatory.

Ask yourself these questions:

- How accurately does the customer describe the problem?
- Do they use the correct technical terminology?
- Is the customer able to follow any workaround you provided?



Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

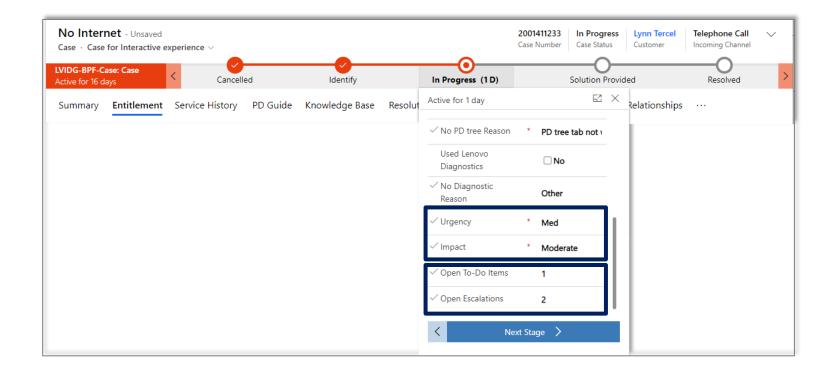
If no PD Code

Complete the BPF Menu

Can You Proceed?

At this time, the **Urgency** and **Impact** fields are not used. You can ignore these until they are implemented at a later date.

If there is a number in **Open To-Do Items** (that is, Action Items) or **Open Escalations**, you are unable to move the BPF to the **Solution Provided**stage. There must be no active escalations to be able to progress to **Solution Provided**.



You have completed all the mandatory and key optional fields for the In Progress stage.

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Complete Reported
Symptom Field

Run Lenovo Diagnostics Service Delivery Indicator tab

Complete the PD Guide Tab

If no PD Code

Complete the BPF Menu

Can You Proceed?

Which situation is true at this point?

Issue Not
Solved
(Create a
Work Order)

If the customer's issue has not been solved, your next step is to create
a Work Order. Keep the BPF in the In Progress stage, do not progress
to the next stage. To learn how to create a Work Order from a Case,
refer to the applicable Work Order course in this series, such as:

CPRW105 Carry-In Center for Front Counter Admins CPRW108 Customer Replaceable Units

CPRW106 Depot for Agents CPRW109 Onsite for Agents



Open Escalations

• If this Case has any open Escalations, keep the BPF in the In Progress stage, do not progress to the next stage until they are all closed. For details, refer to the *Queues and Escalations* course (CPRW117).



Issue Solved • If you are successful in solving the customer's issue (and there are no open Escalations), then proceed to the next step – moving the BPF to the Solution Provided stage. Proceed to the next slide.



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Complete Tasks in the Solution Provided Stage

Document how the issue was resolved

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Cancelled

Entitlement Service History PD Guide Knowledge Base Resolution Attachr

In the Identify
Stage

In the In Progress Stage

In Progress (57 Min)

Active for 57 minutes

In the Solution Provided Stage

Diagnose

Case Status

Service Delivery Indicator

Solution Provided

Bamboo Girders

2001325281

EZ X

Copy an
Existing Case

Telephone Call

Incoming Channel

Resolved

APOS ...

Move to Solution Provided stage.

Complete the Resolution Tab.

Complete the Notes Tab.

No Power No Sound - Saved

LVIDG-BPF-Case: Case

Active for 19 hours

Summary

Case · Case for Interactive experience >

Finish Repair Check List.

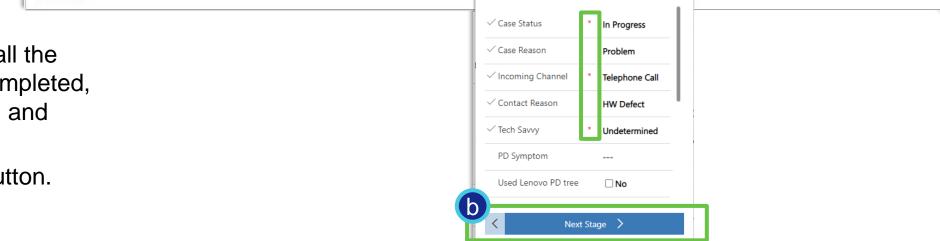
Identify

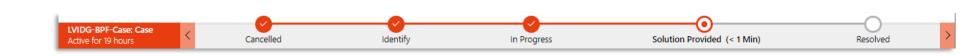
<u>If Unresolved,</u> <u>Change BPF.</u>

To move the BPF to the **Solution Provided** stage:

- a. On the BPF, click the **In Progress** bullseye.
- Take a final check that all the mandatory fields are completed, including Case Reason and Contact Reason.
- c. Click the **Next Stage** button.

The bullseye moves to the next stage:





In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Move to Solution Provided stage.

Complete the Resolution Tab.

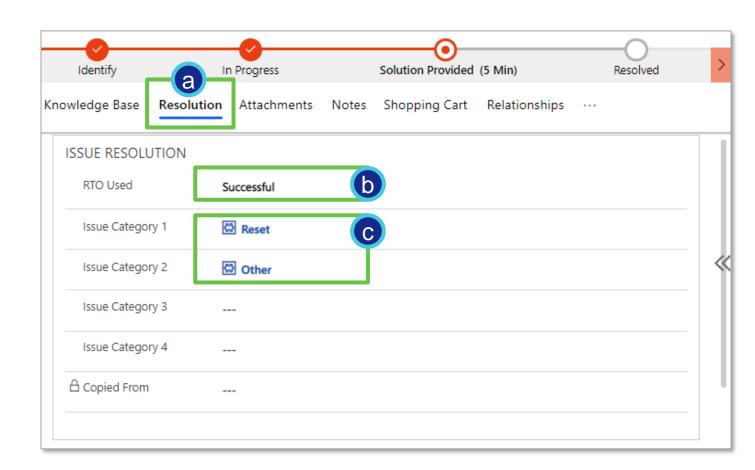
Complete the Notes Tab.

Finish Repair Check List. If Unresolved, Change BPF.

If used, you have the option to record the RTO (*Remote Take Over*) diagnostics.

- a. In the Case record, near the right end of the row of tabs, click the **Resolution** tab.
- b. In the **Issue Resolution** section, select Successful from the **RTO Used** dropdown menu in the Issue Resolution section.
- c. Fill in at least the **Issue Category 1** and **Issue Category 2** fields with the appropriate values.

If RTO was unsuccessful, then the problem is not fixed and the BPF must be moved back to the In Progress stage.



In the Identify
Stage

In the In Progress Stage In the Solution Provided Stage

Copy an
Existing Case

Move to Solution Provided stage. Complete the Resolution Tab

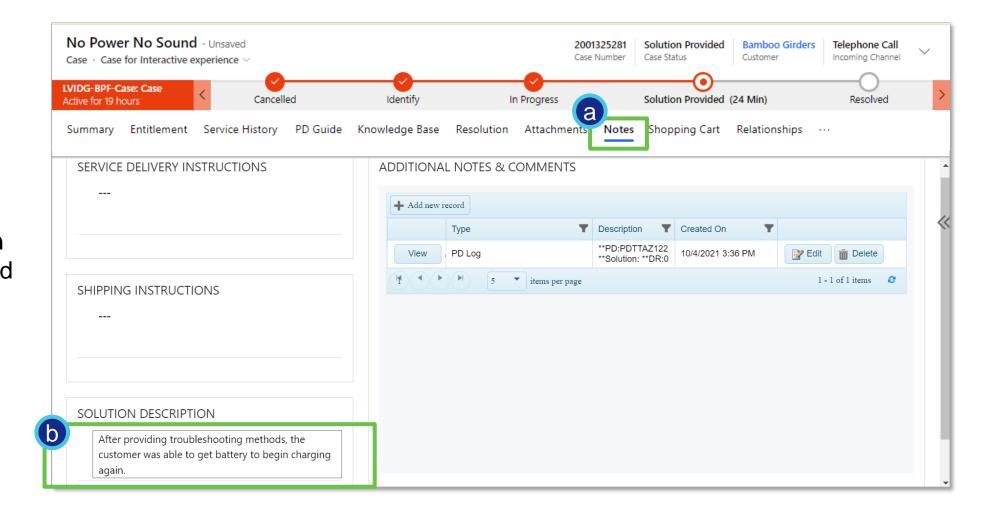
Complete the Notes Tab.

Finish Repair Check List.

If Unresolved, Change BPF.

If the issue has been resolved at the Case level, complete the **Solution Description** field in the **Notes** tab:

- a. In Edit mode, click the **Notes** tab.
- b. Click in the **Solution Description** field and enter the actions taken to resolve the issue.



In the Identify
Stage

In the In Progress Stage

In the Solution Provided Stage

Copy an
Existing Case

Move to Solution Provided stage.

Complete the Resolution Tab.

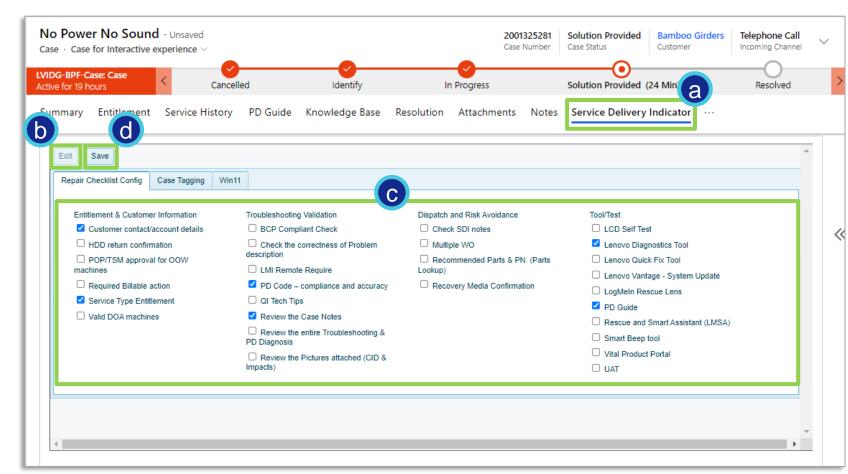
Complete the Notes Tab.

Finish Repair Check List. If Unresolved, Change BPF.

If you started this optional checklist earlier (see Slide 26), this is the point when you finish recording the

tasks you have completed.

- a. Click the **Service Delivery Indicator** tab.
- b. Click the **Edit** button in the upper left.
- c. Select the tasks you have completed, such as the PD Guide tab (fourth column).
- d. When complete, click the **Save** button in the upper left.



In the Identify
Stage

In the In Progress Stage In the Solution Provided Stage

Copy an
Existing Case

Move to Solution Provided stage.

Complete the Resolution Tab.

Complete the Notes Tab.

Finish Repair Check List.

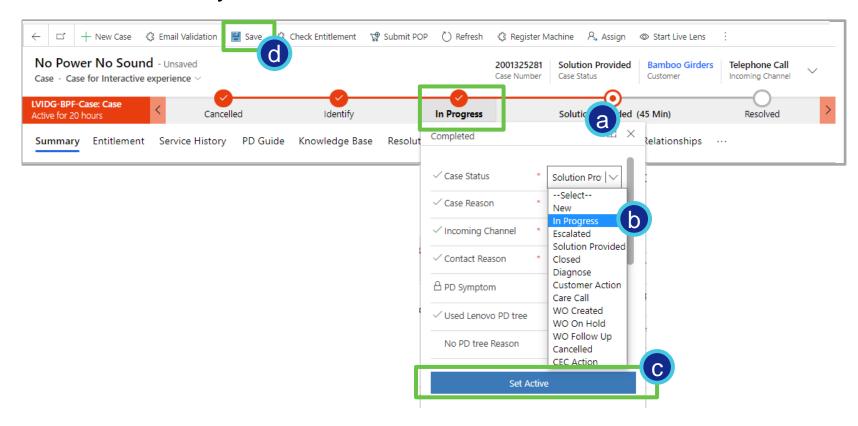
<u>If Unresolved,</u> <u>Change BPF</u>.

• If the customer issue is fixed, you can leave the Case in the **Solution Provided** stage. The system will close it out automatically. You are finished with this Case.

If the Case was not resolved and it is currently in Solution Provided, it must be returned to the

In Progress stage.

- To return to the In Progress stage:
 - a. Click the **In Progress** bullseye.
 - b. In the Case Status field, select In Progress from the drop-down list.
 - c. Click Set Active.
 - d. Click Save.



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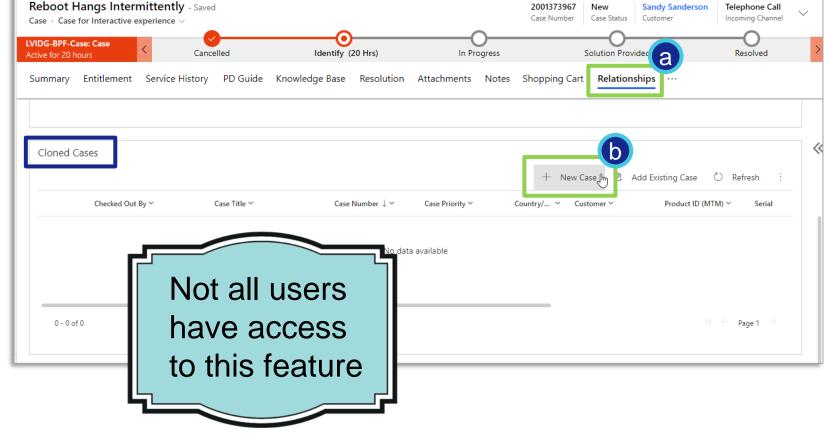
Copy an Existing Case

Could save you some time and effort

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If you are going to create a new Case and there is an existing Case with much of the information you need, you might save time and effort by copying the original Case. Then, you just make a few changes – as needed – for the new service request.

- a. Open the Case you want to copy from and, on the row of tabs, click **Relationships**.
- b. Scroll down to the Cloned
 Cases section to click New
 Case, located on the right.
 A lightbox message might
 appear over the New Case
 form (see next slide).



Continues on next slide...

In the Identify
Stage

In the In Progress Stage

In the Solution
Provided Stage

Copy an
Existing Case

c. If this message appears, click the **Discard Changes** button (<u>not</u> the Save and Continue button!).

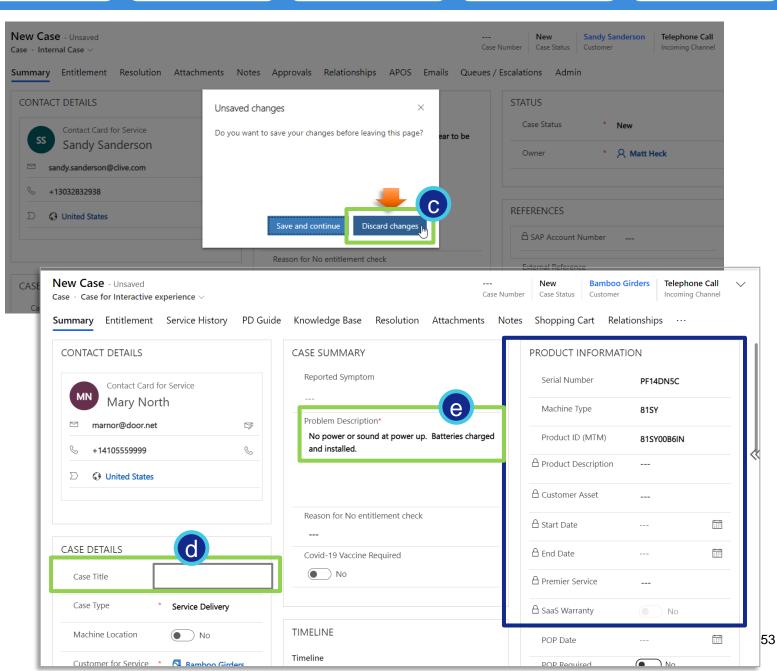
Now you view the **New Case** form:

- ✓ Some fields are filled with data from the Case.
- ✓ The system may not bring over data in the Product Information section. You may have to use the latest entitlement information for the customer asset.
- d. Give the new Case a new Case

 Title in the first column.
- e. Fill out the **Problem Description** in the middle column.

Continues on next slide...

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Create the Case Copy

Create a New Case In the Identify
Stage

 \leftarrow

In the In Progress Stage

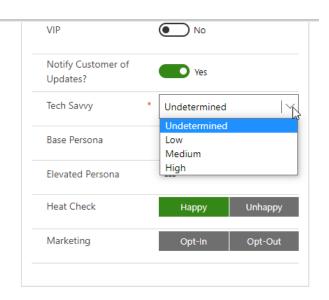
— New Case

In the Solution
Provided Stage

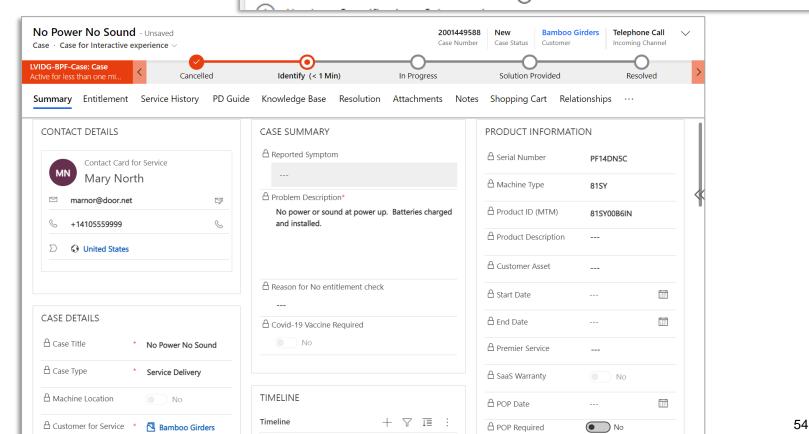
Save & Close

Copy an
Existing Case

名 External Links ∨



- f. Ensure all mandatory fields, such as **Incoming Channel**, are not empty. One easily forgotten field with a red asterisk is **Tech Savvy**, located close to the bottom of the third column (shown left).
- g. Go to the Command Bar to click **Save**.



The new Case appears. You will progress through this Case in the normal way, including providing the serial number and checking entitlements.

Smarter technology for all

than (s.