# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)Process Document

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**Student Advice and Wellbeing**

**Assigning an Email or a Case to a Colleague/Yourself**

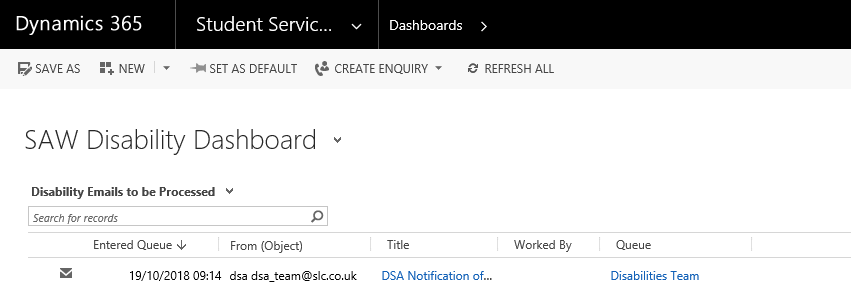
Version 0.3, November 2018

Author: DS Business Support

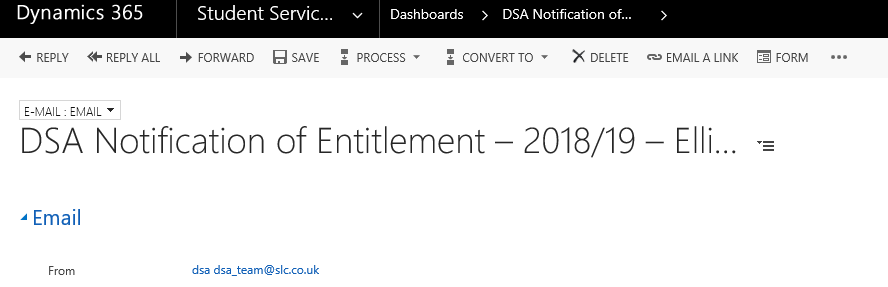
This process will ensure that an email can not be selected by another user. You can also ‘assign’ an email to a member of your team.

These instructions should assist in the management and organisation of incoming emails.

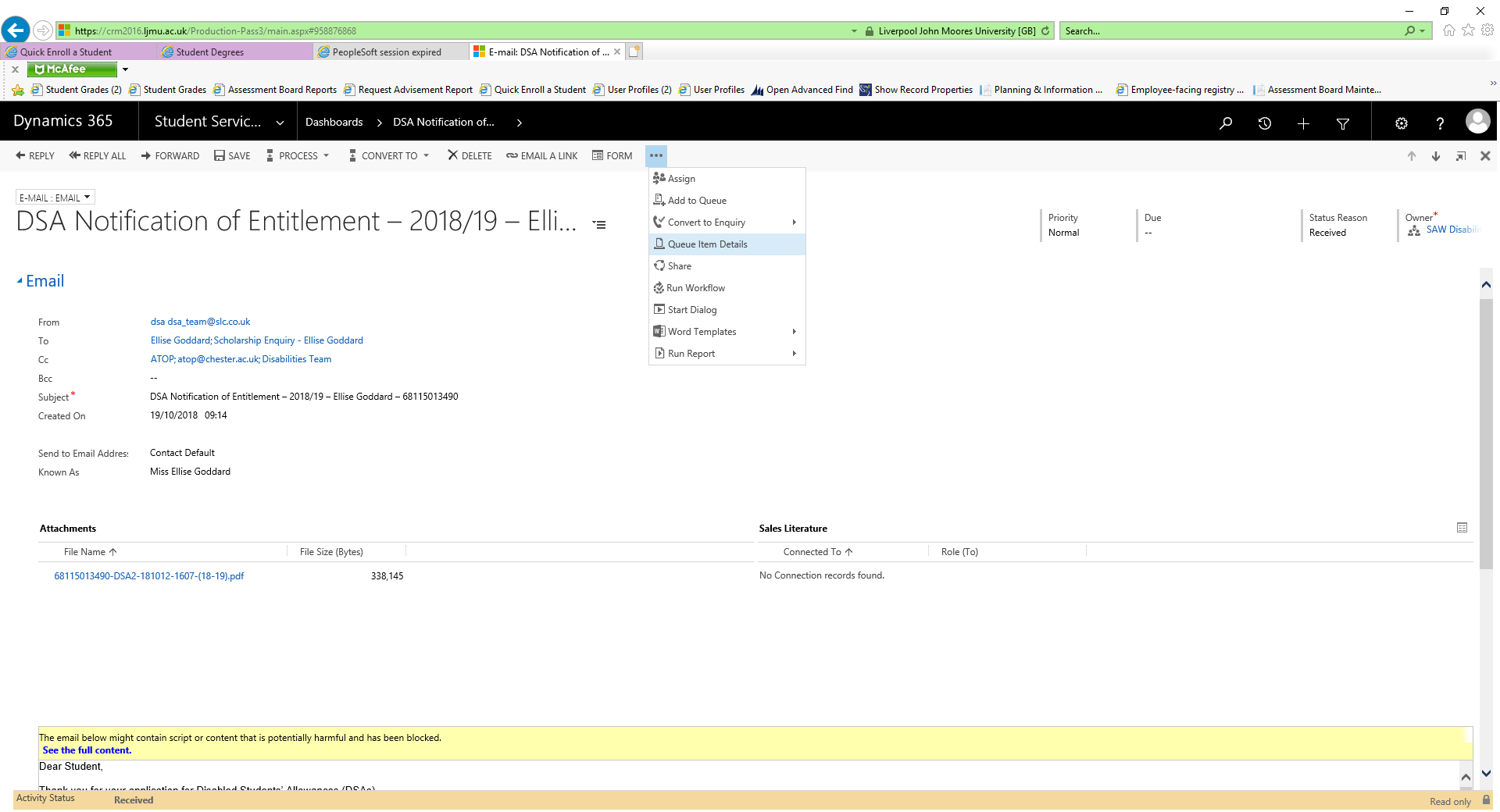
1. From your Dashboard, select the E-mail from the Queue



1. Once the E-mail opens up, click on to the **ellipsis (3 dots)**:



1. From the drop down menu, click on to **Queue Item Details**.



1. Click into the **Worked By** field

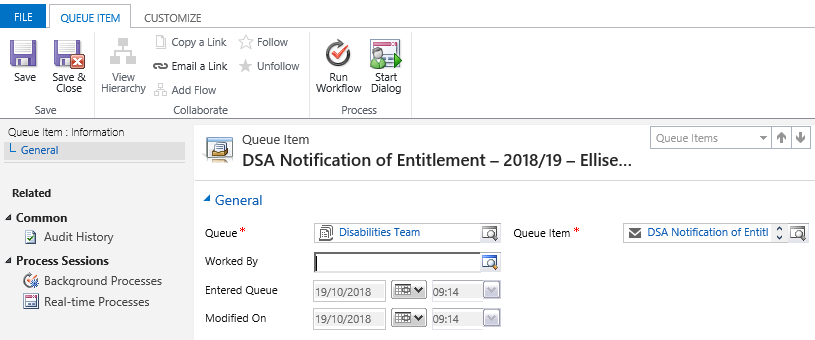
Type the first few letters of your colleagues name (or your name) and click on

the **look up button.**

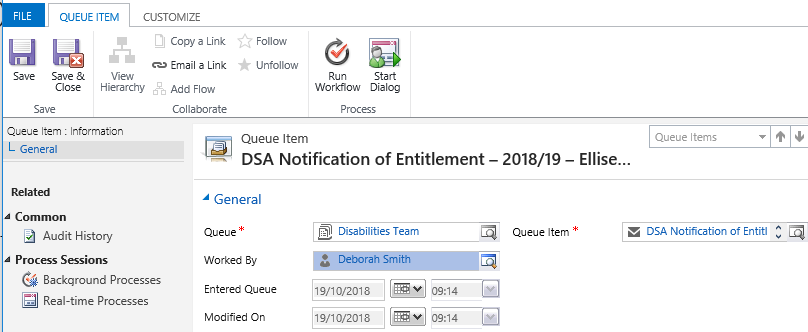
**Select the correct Name from the list.**

**Note:** The name should appear so that it can be selected. If the name doesn’t

appear, then you may need to use the wildcard (\*)



1. Your name (or colleagues name) will now display in the **Worked by** column.



1. Finally, click on the **Save and Close** button.
2. If you navigate back to your dashboard, you will now see that the **‘Worked By’** column now displays the selected name.

