

# Create a Telephone Case

## FamilySearch Support System



For this practice exercise, go to the FamilySearch Support Training System, by clicking the icon on your desktop. You will need a user name and password to login to the FamilySearch Support Training System.

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### Practice Exercise

Do the following:

1. Enter the first few letters of the given name and then the surname.
2. Click **Find Patron**.
3. If you find the patron, click the button next to his or her name. Click **Select**.
4. If the patron is not listed, click **Create**.
5. Type information in the patron fields. Click **Save**.
6. In the **Notes** field, type notes regarding the patron's question.
7. From the **Category 1** drop-down list, select a category.
8. From the **Category 2** drop-down list, select a category.
9. In the **Case Title** field, type a name for the case (80 characters maximum).
10. Click **Find an Answer**.
11. Locate and add a knowledge document to the case.
12. Create an e-mail response to the patron with the knowledge document attached.
13. In the **Problem**, **Resolution**, and **End Result/Other** fields, type notes.
14. Save the case.
15. Return to the Create Case window.
16. From the **Resolution** drop-down list, select a resolution.
17. Close the case.