## **Managing an Existing Case**

- Dealer Technicians manage previously created cases in Cherwell by accessing <u>Service Library</u>.
  - To manage previously created cases in Cherwell via Service Library:
    - Log in to DealerCONNECT
    - From the **Service** tab, select **Service Library** link
    - Once in Service Library, click "Contact STAR Center" button (telephone icon) on top-right of screen
    - Select Existing Cases
    - User will be directed to the main dashboard in Cherwell where existing cases can be searched and reviewed
- The Dealer Technician can click on any of the records or summary numbers in Cherwell to be taken to an existing case or queue.
- Upon selecting a case/case number, Technician will be directed to a Case Summary page.
- Any case can be updated by clicking 'Edit' button on the Case Summary page.
- Selecting 'Abandon Case' button cancels an existing case, even in draft phase.



- <u>Note</u>: At times it may be necessary to manage draft cases that has not yet been submitted to STAR prior to initiating a new Cherwell case from Service Library, especially if a technician has reached the maximum allowed open or draft cases (plus incomplete surveys).
  - Abandoning draft cases when they are no longer needed (and completing open surveys) in Cherwell will help prevent this from happening.