How to Submit a Case to the CSM Queue (Internal)

08/26/2025 1:00 pm EDT

This article provides step-by-step instructions for Bold Group staff to correctly submit a case to the Customer Success Management (CSM) Queue in Salesforce.

Proper submission ensures visibility, accountability, and that the CSM team has all the details needed to respond efficiently.

How to Access the CSM Queue

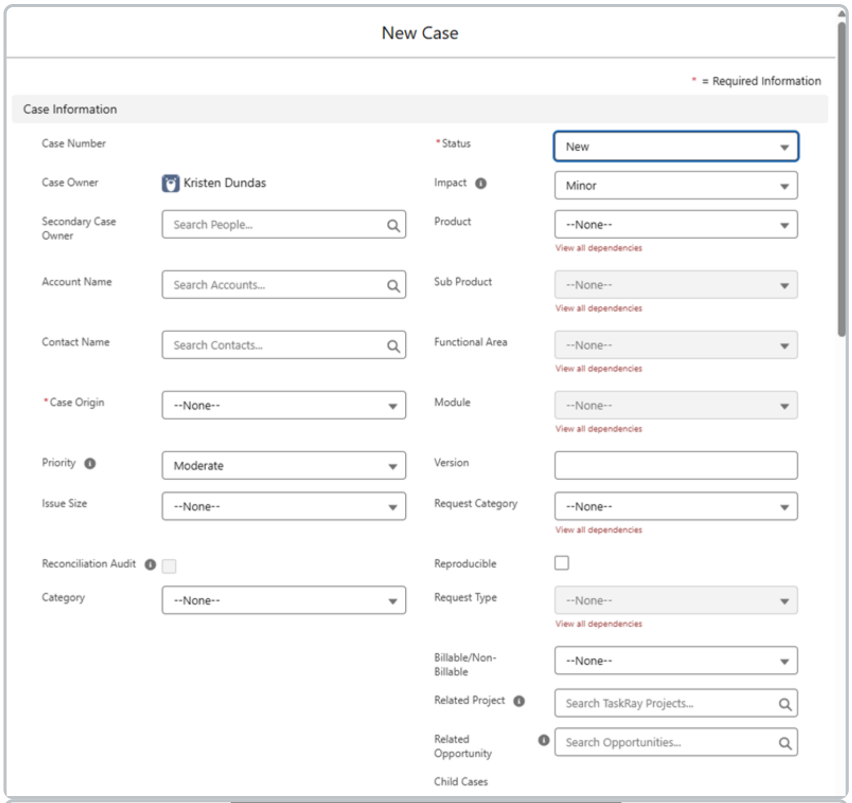
- Navigate to: Salesforce > Cases > select "Customer Success" from the drop-down filter.
    - Or use the direct link

Step 1: Open a New Case

1. In Salesforce, click New Case.
2. The case submission form will open.

Step 2: Fill Out Case Information (Top Half of Form)

- Case Owner / Secondary Case Owner: Case Owner defaults to the CSM queue. Secondary Case Owner = the internal person submitting the case.
- Account Name: Select the customer account this case is being submitted for.
- Contact Name: Identify the customer contact who should receive updates from the CSM.
- Case Origin: Select the last method of communication where this request originated (email, phone call, in-person, etc.).
- Priority: Options are Low, Medium, High, Critical. This reflects the customer's view of urgency. Critical should only be used if it truly reflects immediate business impact. If CSM is already engaged, note that in the Description field.
- Issue Size: Leave blank unless instructed otherwise.
- Category: Select an existing category if relevant, otherwise choose None.
- Status: If this is a new submission, select New. Otherwise, choose the most appropriate status.
- Impact: Use guidance in SLA KB to align impact with response times. Click the (i) icon for more info.
- Product: Required. Select the correct product line so the case is routed to the right CSM.
- Sub Product / Functional Area: Fill these in if the request is related to software use. Leave blank if the request is CS-related.
- Skip these fields: Version, Request Category, Reproducible, Request Type, Billable/Non-Billable.
- Related Project: If there is an active PS project, link it here.
- Related Opportunity: If the issue originated during Sales, link to the Opportunity if available.


New Case

* = Required Information

Case Information

Case Number

*Status: New

Case Owner: Kristen Dundas

Impact: Minor

Secondary Case Owner: Search People...

Product: --None--
View all dependencies

Account Name: Search Accounts...

Sub Product: --None--
View all dependencies

Contact Name: Search Contacts...

Functional Area: --None--
View all dependencies

*Case Origin: --None--

Module: --None--
View all dependencies

Priority: Moderate

Version

Issue Size: --None--

Request Category: --None--
View all dependencies

Reconciliation Audit

Reproducible

Category: --None--

Request Type: --None--
View all dependencies

Billable/Non-Billable: --None--

Related Project: Search TaskRay Projects...

Related Opportunity: Search Opportunities...

Child Cases

Top half of New Case submission form

Step 3: Fill Out Description Information (Bottom Half of Form)

Subject:

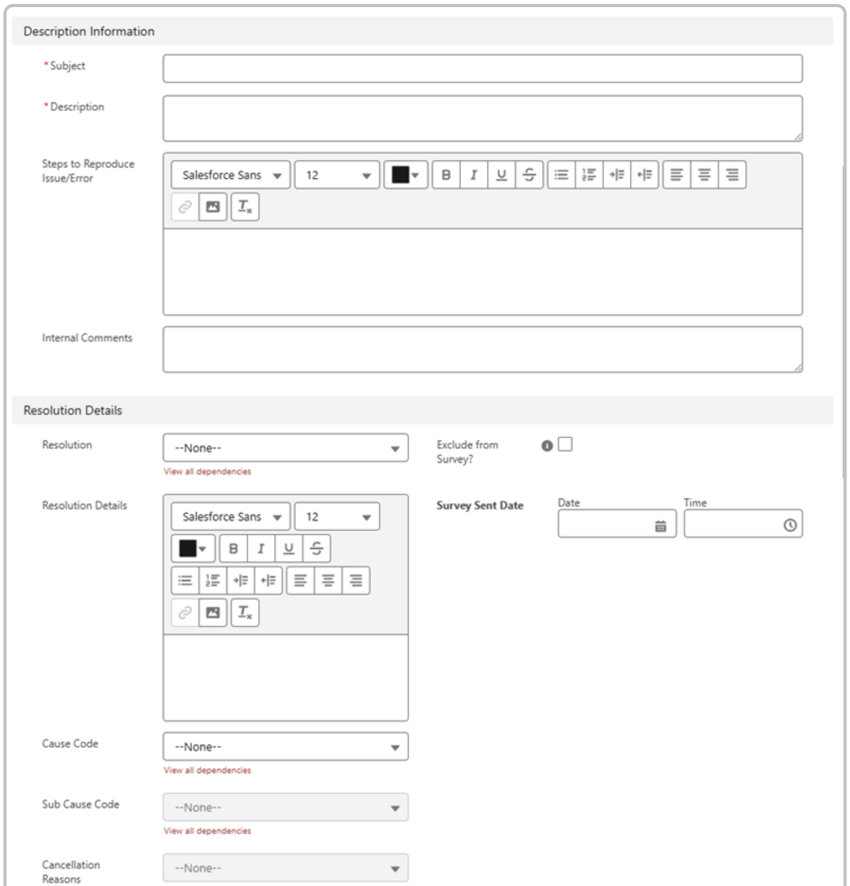
- Enter a 1-sentence summary of the issue or request. Keep it short and specific.
- Example formats:
  - Escalation: Customer unable to complete first RMR run
  - Credit Request: Customer asking for 3 months credit
  - Cancellation Request: Please work with SalesOps
  - Renewal: Confirm customer term and renewal timeline
  - Retention Risk: Customer frustrated with response times
  - Training Request: Schedule follow-up with AC

Description:

- Provide as much detail as possible.
- If attaching supporting info (emails, screenshots, case comments, etc.), mention in this section: "See attachments in Files tab."
- A strong description should include:
  - What the issue is (product, process, or account).
  - What has been tried so far (steps taken internally or with Support).
  - Why this is an escalation (impact to customer, timeline/history).
  - What help you need from the CSM team.
  - Timeline (how long the issue has been ongoing, whether it's urgent).
- Reminder: This section could be visible to customers in the future. Keep confidential/internal details in Internal Comments.

Internal Comments:

- Use for notes that should not be customer-facing.
- Example: account health context, internal concerns, staffing challenges, or speculation about root cause.



Bottom half of New Case submission form

Additional Recommendations (Best Practice)

When submitting cases, always aim to provide enough information so the CSM can immediately take action without needing to go back to the submitter.

Best practices suggest including:

- Impact statement – describe the effect on the customer's business (lost time, billing impact, compliance risk, etc.).
- Severity vs. urgency – clarify if the issue is not blocking operations but is highly visible.
- Attachments labeled clearly – name files logically (e.g., RMR_error_screenshot.png).
- Customer sentiment – note if the customer is frustrated, upset, or praising.
- Contact availability – provide the best way/time for CSM to reach the customer contact.

Step 4: Resolution Details (Optional for Submitters)

In most cases, the Resolution Details section will be updated by the CSM or Support team.

- Leave Resolution, Cause Code, Sub Cause Code, and Cancellation Reasons blank unless instructed.
- Submitters should focus on Description and Internal Comments.

Step 5: Save, Submit, and Transfer Owner

1. Review all fields for accuracy.
2. Ensure Description clearly outlines the situation and attachments are noted.
3. Click Save to create the case.

> IMPORTANT: After saving, you must **manually transfer the case to the Customer Success queue**. Simply saving will leave the case assigned to you, and the CSM team will not see it until it is reassigned.

To transfer: Update the Case Owner to “Customer Success” in the Owner field before closing the form.