



CX Connect Case Creation Help + Tips and Tricks

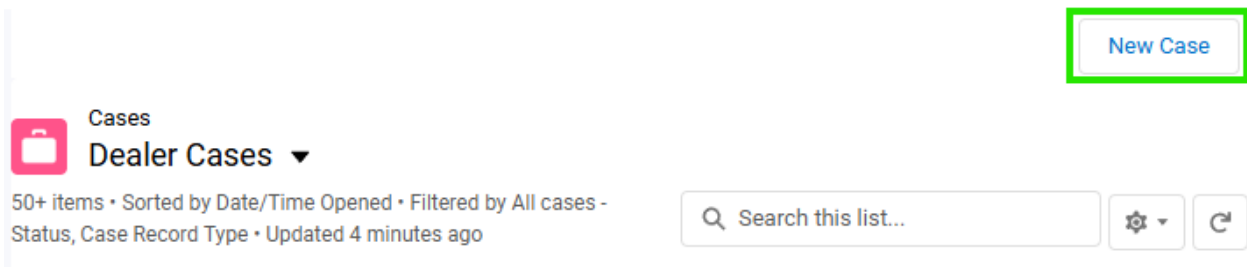
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Creating a Case

1. To start a new case in CX Connect, navigate to the **Home** page and click the **New Case** button.



2. On the **Create Draft Dealer Case** screen, confirm that you have checked all available resources, select **Yes** once you have, and click **Next**.

Create Draft Dealer Case

Before progressing to case creation, have you checked all available resources to attempt to solve your issue? Examples would include BARS, IVH, Service Information, TAC Resolutions, Parts, Order, and Service Workbench. For password resets, have you checked with your PSC?

* Choose your option!

Next

3. On the **New Case: Dealer** page, copy and paste your VIN into the Vehicle field. Click **Show More Results**.

Vehicle

4. Click the radio button next to the vehicle name to select your vehicle. Click **Select**.

Advanced Search

Vehicle ⓘ

1 result found for "1GKS1JKC7JR366459" • Sorted by Relevance

Vehicle Name ▾	Vehicle Des... ▾	Vehicle Iden... ▾	Current Own... ▾	Vehicle Stat... ▾	Record Type
<input checked="" type="radio"/> 2018 GMC Yuko...	2018 GMC Yuko...	1GKS1JKC7JR3...	PlaceholderAct	Demo	GM Vehicle

Type, Intent, and Sub Intent

5. Select the appropriate **Type**, **Intent**, and **Sub Intent** for your case. The **Type** field is the team that you are contacting for support. For example, TAC, DBC, DPAC, TCSC.

Type

▼ -None-

✓ -None-

Dealer to Field

DBC

DPAC

ParTech

PQC

TAC

TCSC

6. Once you select the appropriate **Type**, complete the **Intent** and **Sub Intent** fields. These fields will vary by type and dealer support team, but filling these out to the best of your ability helps the advisor best support your concern.

NOTE: For DPAC case creation, only select **Intent: DCC**.

7. Now that the **Vehicle**, **Type**, **Intent**, and **Sub Intent** fields are populated, click **Save**.

* Case Origin	Status
Dealer Portal	Draft

<div>Vehicle</div> <div>2018 GMC Yukon XL</div>	<div>Type</div> <div>TCSC</div>
<div>* Account Name</div> <div>Customer And Relationship Services</div>	<div>Intent</div> <div>SPS</div>
<div>* Contact Name</div> <div></div>	<div>Sub Intent</div> <div>PROG ERROR REPLACEMENT ECU</div>

Back

Save

Your case will move to draft status. Click **Finish** to proceed.

Create Draft Dealer Case

Case 74812350 created successfully

Finish

Required Fields

8. On the main case page, see the **Dealer Instructions** area near the top of the case. This area includes all required case fields and case assessment to submit the case.



Dealer Instructions

In order to submit your draft, please include all relevant information on case.

"Description", "Vehicle", "Last Odometer Reading", "Odometer Reading Unit of Measure", "DTCs and Symptom Bytes", "Times In", "Days Down" and "Repair Order" are required fields.

Fill out a case assessment. Click the Additional Information main tab and then Assessments sub tab. Click the New Assessment button and choose the Techline - SPS Diagnostic Form assessment and complete it. If there is any additional documentation relevant to your case, add it as an attachment in the Related tab.

Once completed, click button "Submit Draft" to send your case to a GM Advisor.

9. The following may be required to submit a draft case, see image below for the highlighted areas:

- Vehicle
- Description
- Sub Intent
- Last Odometer Reading
- Odometer Reading Unit of Measure

▼ Case Information	
Case Number 74812350	Case Owner John 882589310
Case Origin Dealer Portal	Status Draft
Case Origin Ext ID	Pending with
Vehicle 2018 GMC Yukon XL	Pending Since
Account Name Customer And Relationship Services	Type TCSC
Contact Name John Sauer	Intent SPS
	Sub Intent PROG ERROR REPLACEMENT ECU
▼ Additional Information	
Subject TCSC - SPS - PROG ERROR REPLACEMENT ECU	Last Odometer Reading 125,611.00
Description E4491 Replaced ECM	Odometer Reading Unit of Measure MI
Case Close Reason	Parent Case
Final Outcome	Case Owner LOB Techline
Date/Time Opened 8/21/2025, 3:23 PM	Priority Medium Priority (3 days)
Date/Time Closed	Vehicle Line 1J
Case Re-open Reason	Vehicle Family
	Platform Code

Continued: The following may be required to submit a draft case, see image below for the highlighted areas:

- Times In
- Days Down
- DTC's and Symptom Bytes
- Repair Order

▼ Dealer Specific Case Information	
Times In 1	GWM Preauth #
Days Down 1	Non-GM Product <input type="checkbox"/>
Part Number	Course ID
Control Number	Old Person ID
DTC's and Symptom Bytes u1000, p0602	New or Existing Person ID
Bulletin/PI/SI Doc	Continued/New GMIN
Service Information	Order Number
Repair Order 123451	EKC ID
Repair Order Line Number	Lead ID
Repair Order Closed Date	Transaction Number
Dealer Program Code	Stock Number
Labor Operation Code	Restricted Part Number
Damage Code	Are Calibrations Completed?
Rejection Code	Aftermarket Accessories or Modifications
Incentive Code	I Will Call to Provide Additional Info <input type="checkbox"/>

Adding a New Assessment


10. Once the preceding information is completed per the **Dealer Instructions** in step 8, navigate to the **Additional Information** tab and click **New Assessment**.

Details


Feed

Related

Additional Information

 **Advisor Information**

Click on the Case Update you wish to view


 **Collaboration**

Template Type

Transfer/Escalate To

Submitted By

NO RECORDS TO DISPLAY

 **Assessments**

Assessment Type


Created By

Last Modified By

No Record Found

New Assessment

11. In the new assessment screen, select the assessment that is noted in the **Dealer Instructions** at the top of the case page and click **Next**.


 **Advisor Information**
Please search an Assessment template


Assessment

Assessment ()

- ☐ Techline - TLC Diagnostic Form
- ☐ Techline - GM Accessory Form
- ☐ Techline - GDS Diagnostic Form
- ☐ Techline - Reconfiguration Diagnostic Form
- ☐ Techline - SAVI Diagnostic Form
- ☐ Techline - E4398 Diagnostic Form
- ☐ Techline - Service Information Diagnostic Form
- ☐ New Vehicle Damage Form
- ☐ TAC - Diagnostic Form
- ☐ Tech MDI2-DBDT-Tech2Win-Tech2
- ☐ Techline - SPS Diagnostic Form

12. Click on the arrows next to the **General Information, Diagnostic/Repair Information**, and any other options to expand the fields.

 General Information

 Diagnostic/Repair Information

13. Fill out the fields in the assessment. Fields with a red asterisk (*) are required fields. Filling out all fields with the appropriate information will help the advisor better assist in resolving your concern. Once the fields are completed, click **Save**.

NOTE: Assessment fields may be different for each assessment.

▼ General Information

* Best Contact Number

5861234567

* Error Codes

E4491

▼ Diagnostic/Repair Information

Previous Part Number if Module Replaced

12482716

* Current/New Part Number

12972615

* Scan Tool Used

MDI 2




* Scan Tool Connection

USB

Additional information including troubleshooting and troubleshooting results

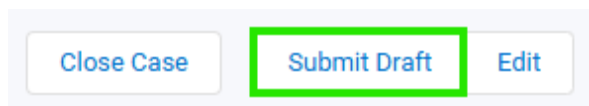
Vehicle was towed into the dealership. Check engine light present. Replaced ECM, part was verified by Partech.

14. You can click the **Eye** icon to view your assessment, or the **Pencil** icon if you need to edit it.

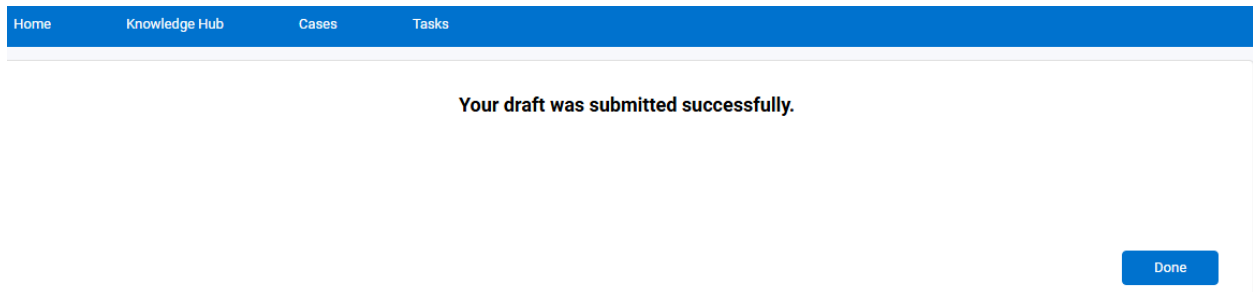
 Assessments			
Assessment Type	Created By	Last Modified By	
Techline - SPS Diagnostic Form	2025-08- 21T19:45:58.000Z	2025-08- 21T19:45:58.000Z	 

Submitting a Case

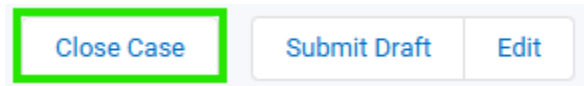
15. Now that you have completed all required information per the **Dealer Instructions** at the top of the case, navigate to the top of the case page and click **Submit Draft**.



NOTE: Confirm that you have received the successful submission message. If you have not received it, you may have to edit your case and ensure that the required fields have been completed.



NOTE: If the draft case is not needed, please close the Draft with **Close Case** button:



- 16.** You have successfully submitted your case. Your case will be routed to the proper team for support.

Updating a Case

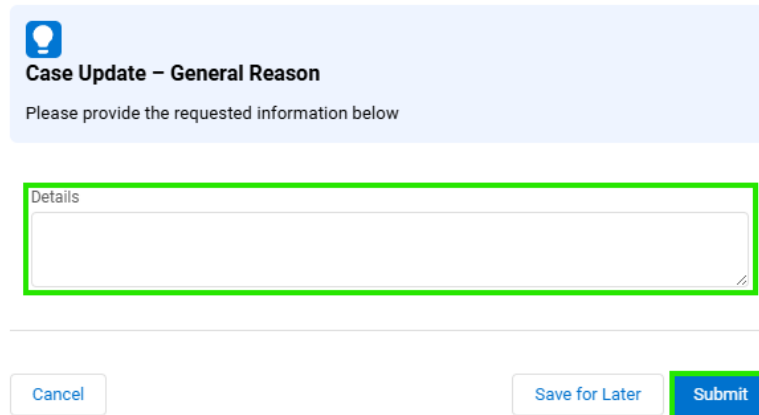
1. To send a case update to the dealer support team assigned to your case, navigate to the **Additional Information** tab, and locate **Collaboration**. Click **New** next to the **Collaboration** area.

The screenshot shows a user interface with four tabs: 'Details', 'Feed', 'Related', and 'Additional Information'. The 'Additional Information' tab is selected and highlighted with a green border. Below the tabs, there are two main sections. The first section is 'Advisor Information', which has a light blue background and contains a lightbulb icon and the text 'Click on the Case Update you wish to view'. The second section is 'Collaboration', which has a light gray background and contains a green icon of two people. To the right of the 'Collaboration' section, there is a green-bordered button labeled 'New'.

2. A **New Dealer Response** splash screen will appear. Click the radio button next to **Case Update – General** and click **Next**.

The screenshot shows a 'New Dealer Response' splash screen. At the top, the title 'New Dealer Response' is centered. Below the title, there is a label 'Select a response type:' followed by a radio button and the text 'Case Update – General'. The radio button is selected. At the bottom right of the screen, there are two buttons: 'Cancel' and 'Next'. The 'Next' button is highlighted with a green border.

3. A case update screen will appear with a details field. Provide all necessary details here and click **Submit**.

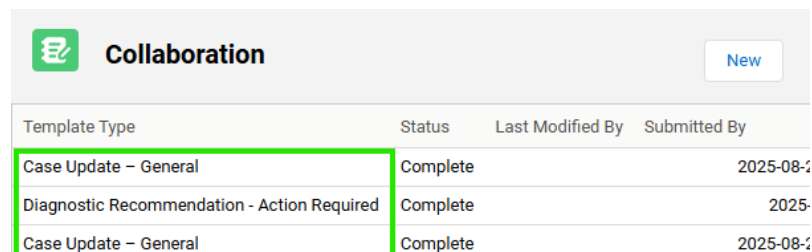


Case Update - General Reason
Please provide the requested information below

Details

Cancel Save for Later Submit

4. You can view your updates, as well as updates provided from the dealer support team, under **Collaboration**. Clicking Collaboration will display the direction or details that the advisor has provided. You will be notified by the notification bell at the top right of CX Connect for advisor collaborations.



Template Type	Status	Last Modified By	Submitted By
Case Update - General	Complete		2025-08-2
Diagnostic Recommendation - Action Required	Complete		2025-
Case Update - General	Complete		2025-08-2

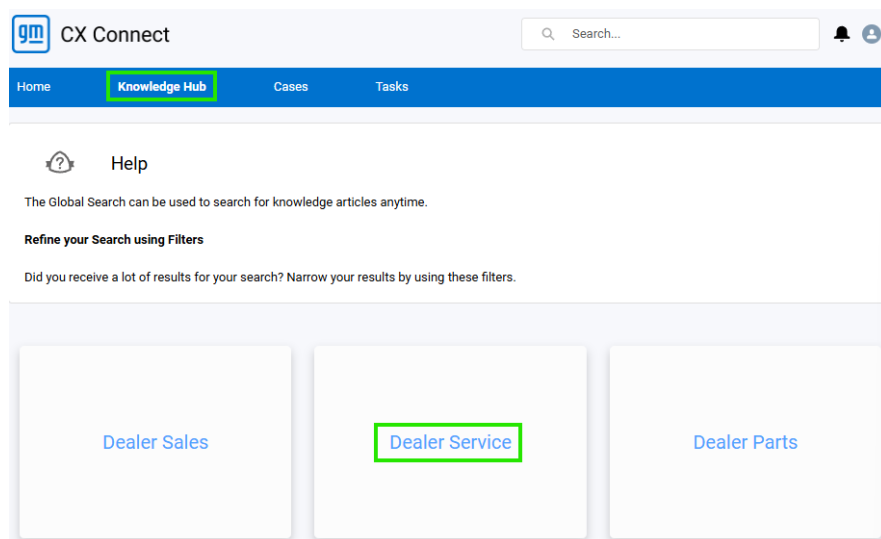
NOTE: Collaboration is the intended area for case updates between dealer and advisor. For a cohesive experience, please use the appropriate collaboration field when making case updates.

Accessing Dealer Resolutions

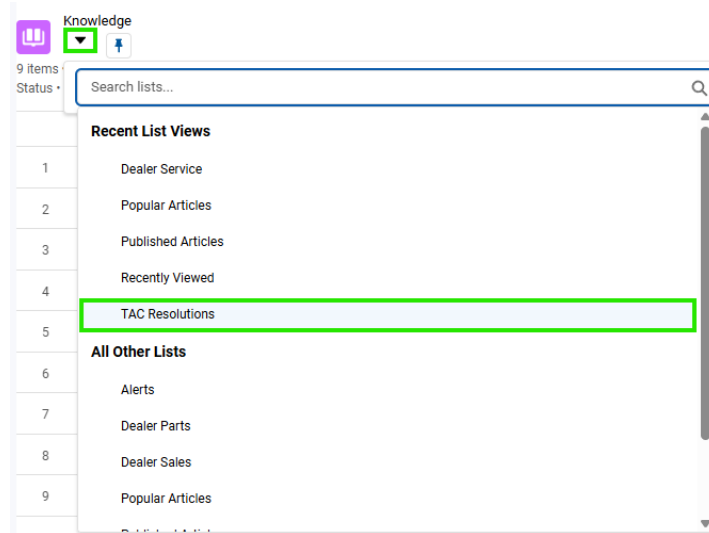
1. To access dealer resolutions, navigate to the **Knowledge Hub** tab in the navigation bar.



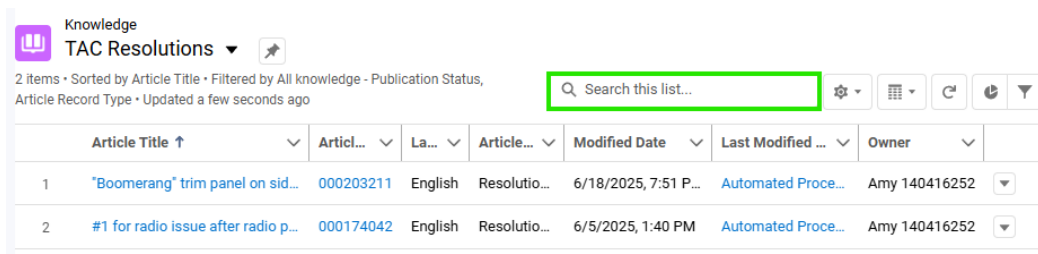
2. In the **Knowledge Hub**, select **Dealer Service**.



3. On the **Dealer Service** page, select the dropdown under **Knowledge** and select **TAC Resolutions**.



4. You can now search for resolutions in the **Search** bar.

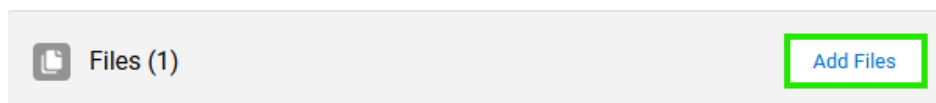


Attaching Files

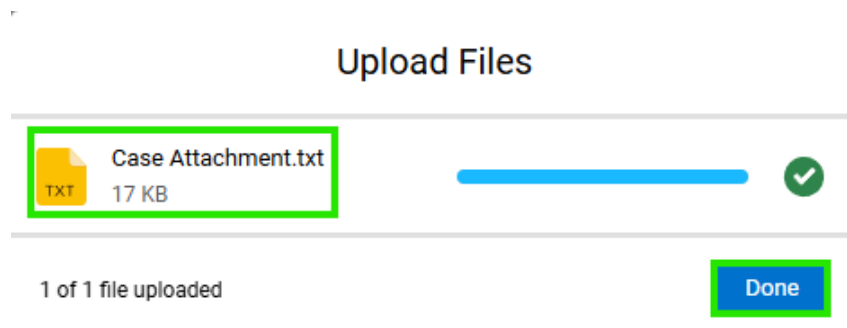
1. To attach a file to your case, select the **Related** tab.







2. In the **Related** tab, click **Add Files**.



3. Select **Upload Files**, navigate to the file that you'd like to upload and click **Open**. Once the file is uploaded, you will see the **Upload Files** splash screen with your attachment. Click **Done** to navigate back to the case page.



4. You can now see all files attached to your case.

Files (2) Add Files				
Title		Last Modified	Size	
 Case Attachment		8/22/2025, 2:57 PM	17KB	
 Picture11		8/22/2025, 9:30 AM	41KB	
View All				

Case Creation Tips and Tricks

- If you missed the recent System Demonstration and Q&A, you can still view the recording [here](#).
- To help you navigate the new system, we've created a [CX Connect Job Aid](#) for guidance and reference as you get started as well as answers to [Frequently Asked Questions](#).
- CX Connect training and reference materials, including open office hour schedules, are available in Global Connect under headline [13086: CX Connect Training Resources & Office Hours](#).
- If your VIN is not found when searching for it during case creation, please verify that the VIN displays in Global Warranty. If it does, and does not populate in CX Connect, use placeholder VIN **VNF11111VNF011111**. The correct VIN needs to be added to the description field.
- Be sure to reference the **Dealer Instructions** at the top of the case creation page to ensure that all required fields are completed. Failure to do so may delay case submission.