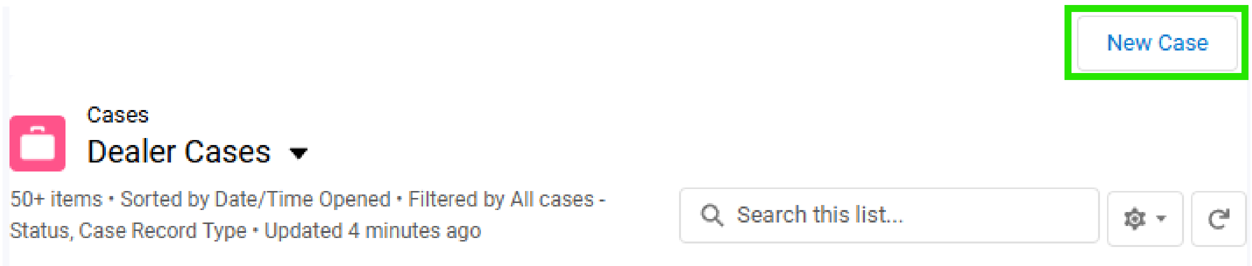
CX Connect Case Creation Help + Tips and Tricks

082025-B

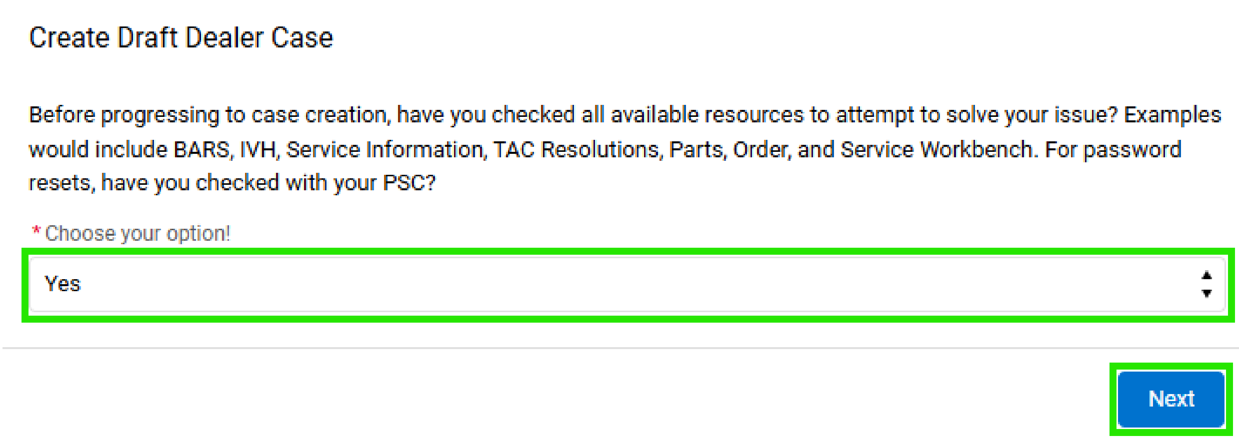
Table of Contents

Creating a Case

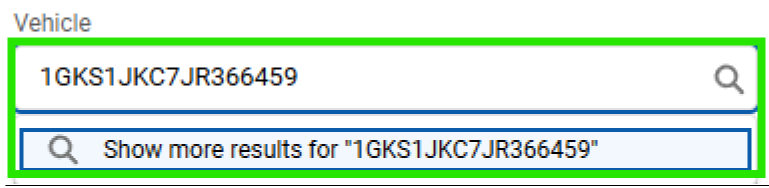
1. To start a new case in CX Connect, navigate to the **Home** page and click the **New Case** button.



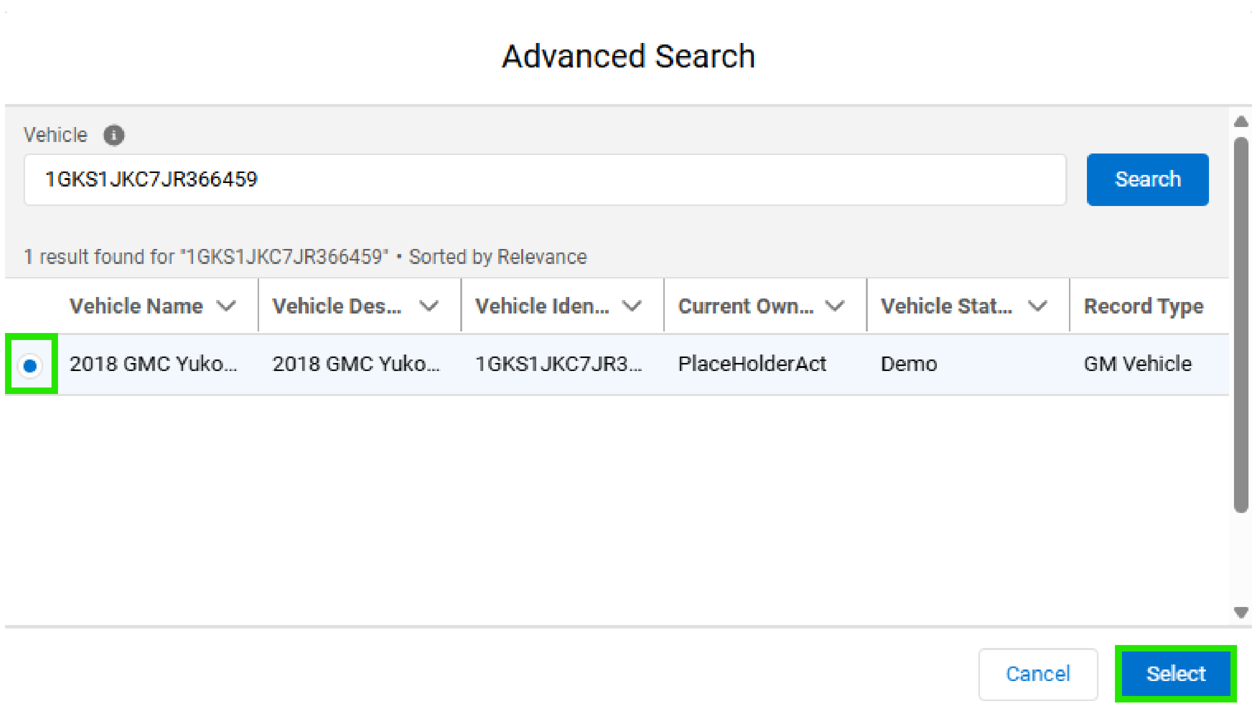
2. On the **Create Draft Dealer Case** screen, confirm that you have checked all available resources, select **Yes** once you have, and click **Next**.



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

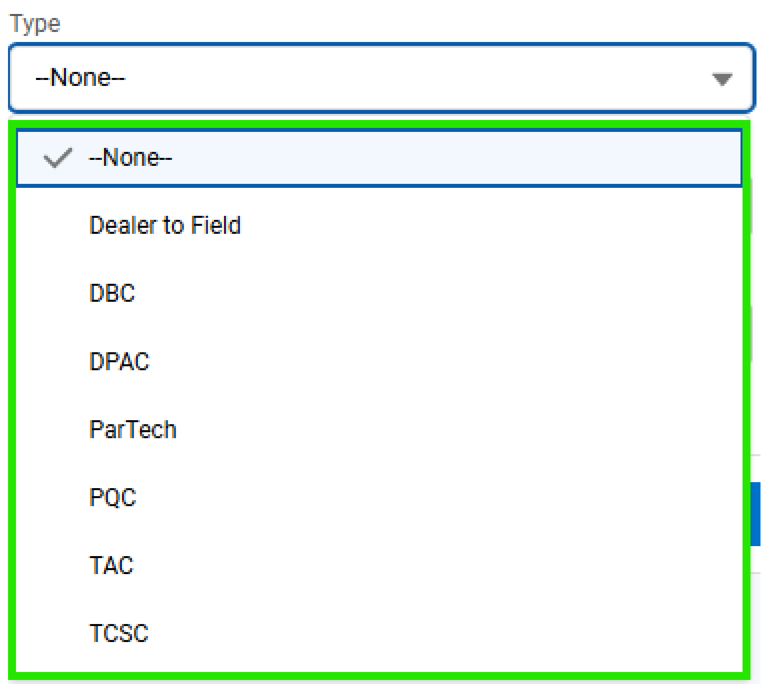


4. Click the radio button next to the vehicle name to select your vehicle. Click **Select**.



Type, Intent, and Sub Intent

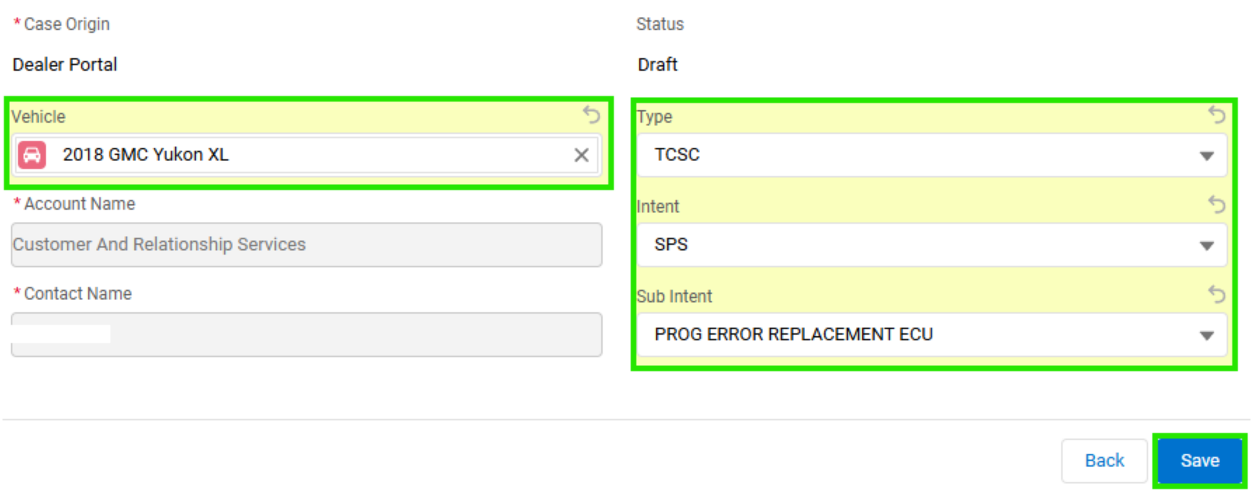
5. Select the appropriate **Type, Intent,** and **Sub Intent** for your case. The **Type** field is the team that you are contacting for support. For example, TAC, DBC, DPAC, TCSC.



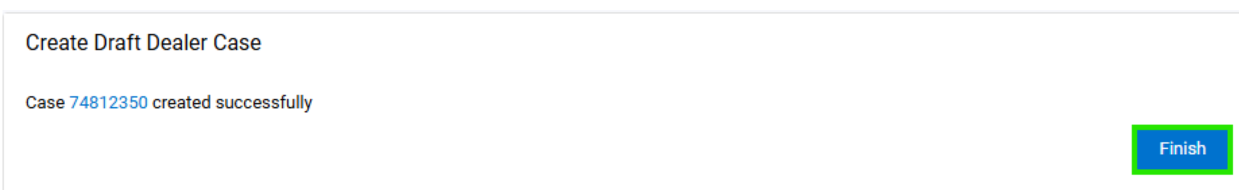
6. Once you select the appropriate **Type**, complete the **Intent** and **Sub Intent** fields. These fields will vary by type and dealer support team, but filling these out to the best of your ability helps the advisor best support your concern.

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

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



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



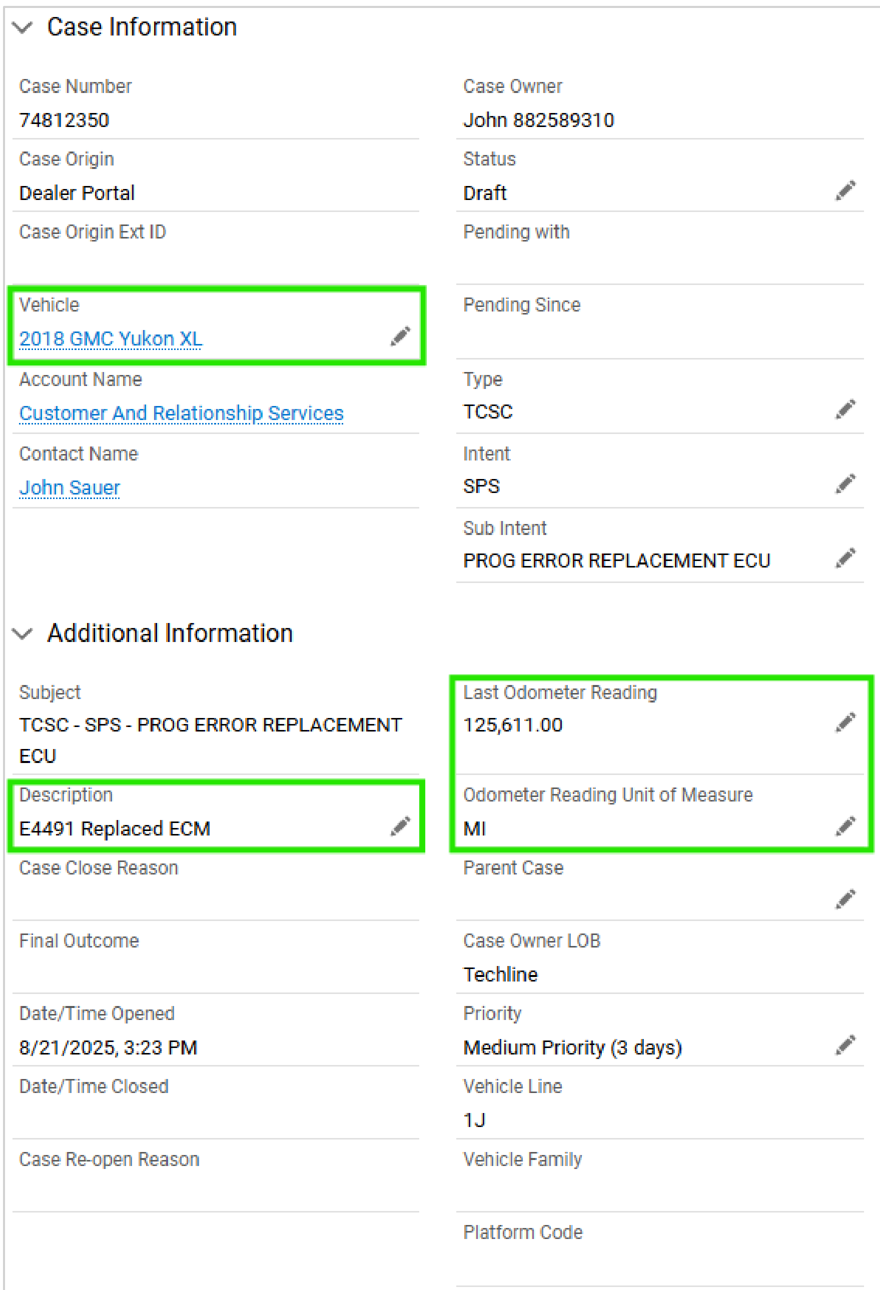
Required Fields

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

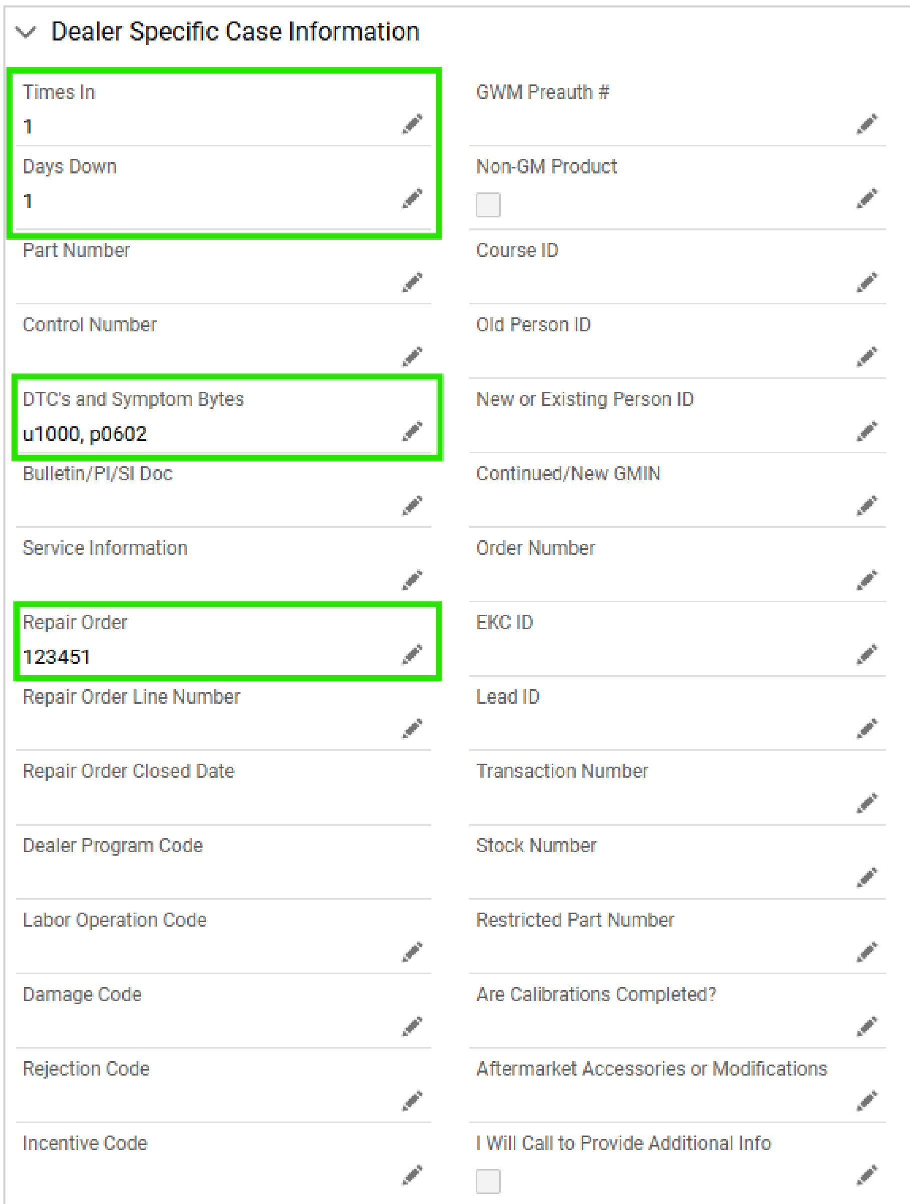
Case Number 74812350	Case Owner John 882589310
Case Origin Dealer Portal	Status Draft
Case Origin Ext ID	Pending with
Vehicle 2018 GMC Yukon XL	Pending Since
Account Name Customer And Relationship Services	Type TCSC
Contact Name John Sauer	Intent SPS
	Sub Intent PROG ERROR REPLACEMENT ECU

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:

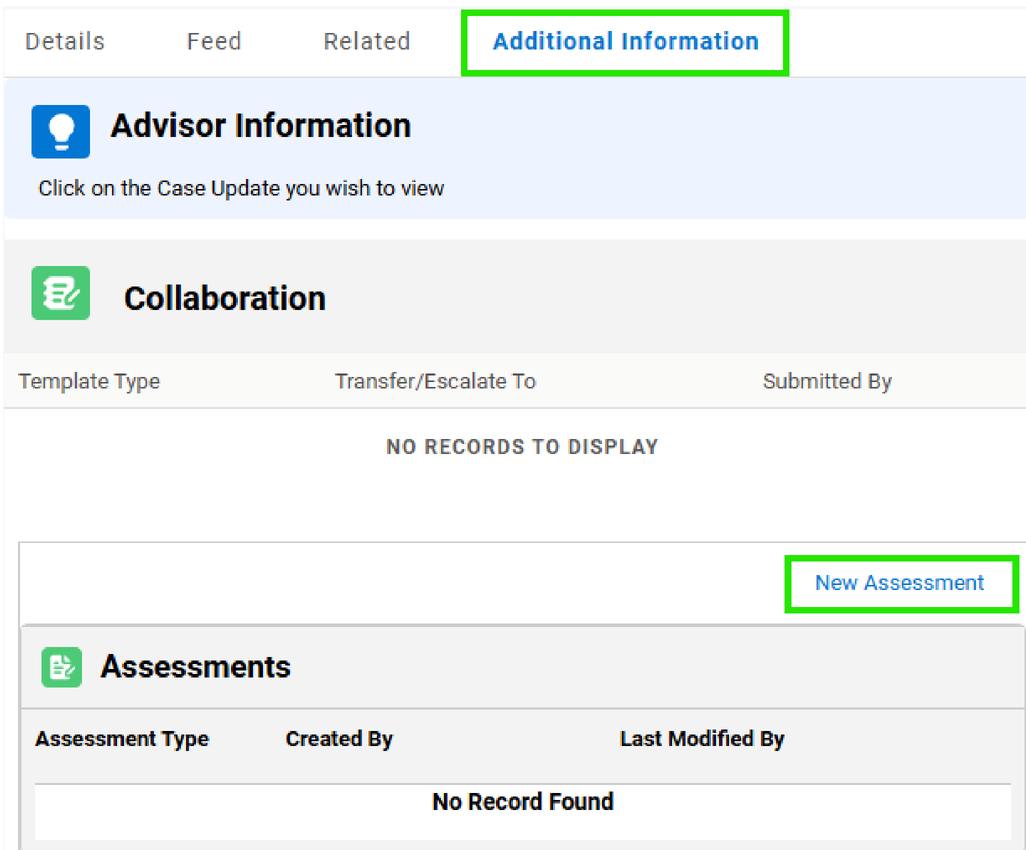
- Times In
- Days Down
- DTC's and Symptom Bytes
- Repair Order


Dealer Specific Case Information

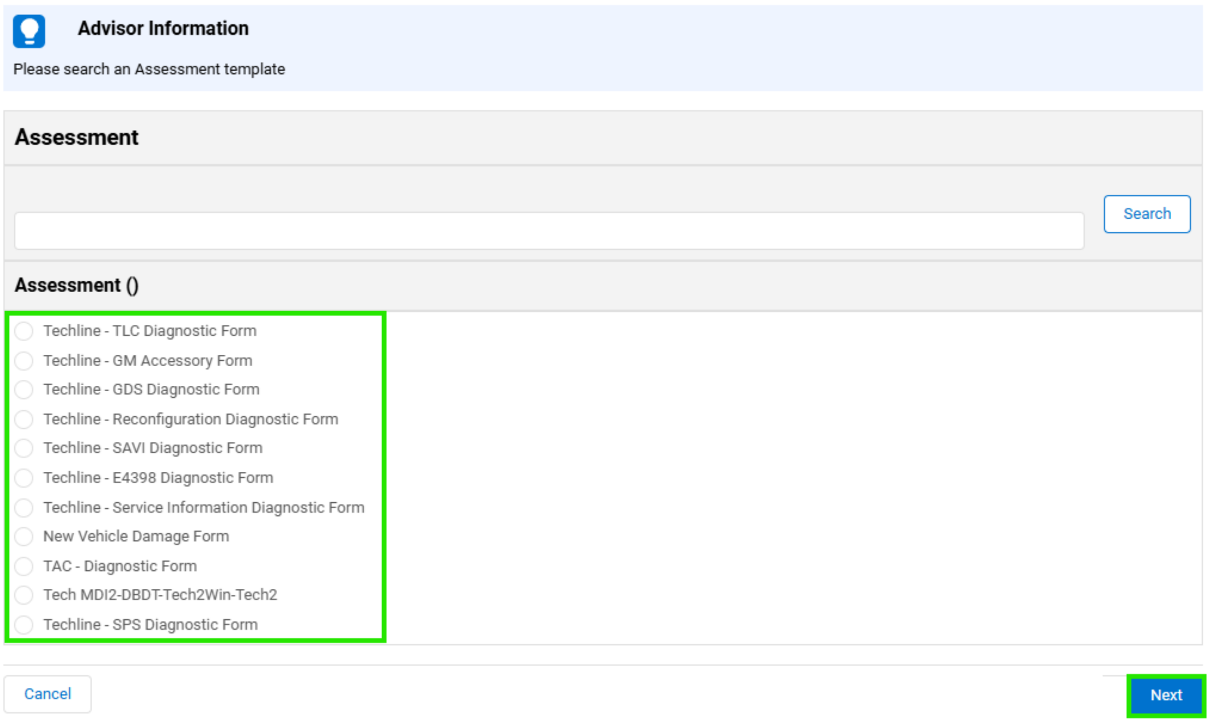
Times In: 1	GWM Preauth #
Days Down: 1	Non-GM Product
Part Number	Course ID
Control Number	Old Person ID
DTC's and Symptom Bytes: u1000, p0602	New or Existing Person ID
Bulletin/PI/SI Doc	Continued/New GMIN
Service Information	Order Number
Repair Order: 123451	EKC ID
Repair Order Line Number	Lead ID
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

Adding a New Assessment

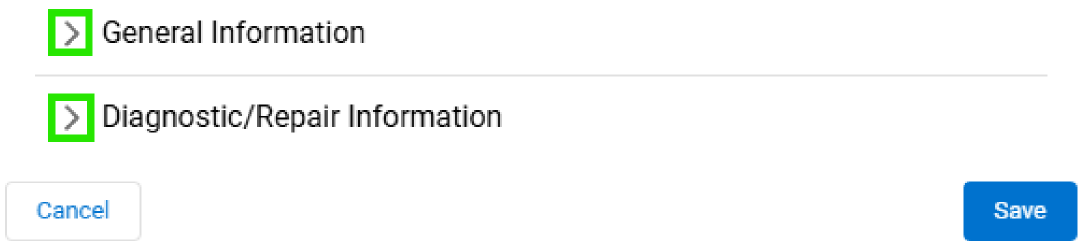
10. Once the preceding information is completed per the **Dealer Instructions** in step 8, navigate to the **Additional Information** tab and click **New Assessment**.



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**.

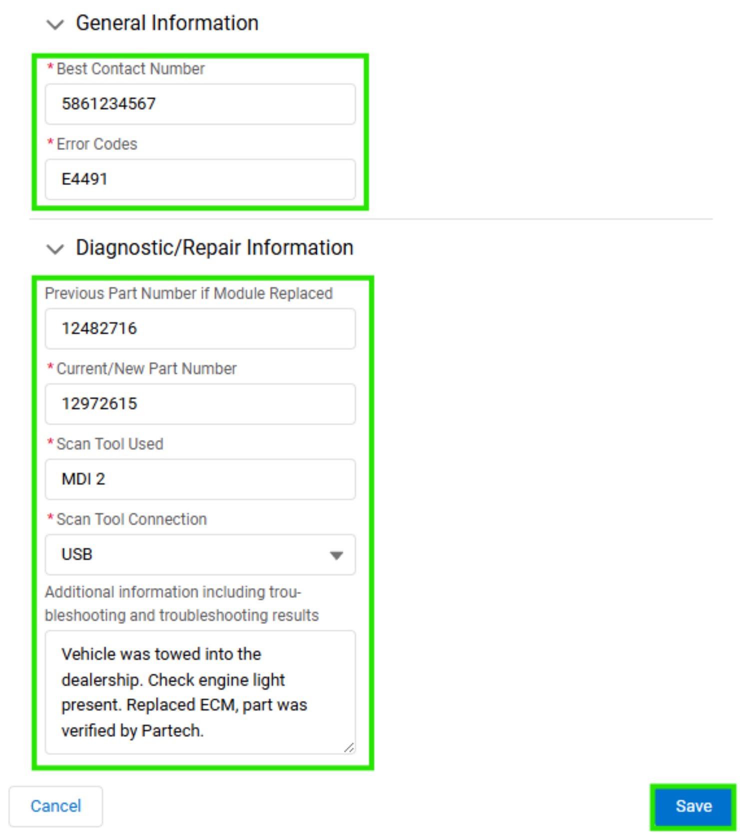


12. Click on the arrows next to the **General Information, Diagnostic/Repair Information**, and any other options to expand the fields.

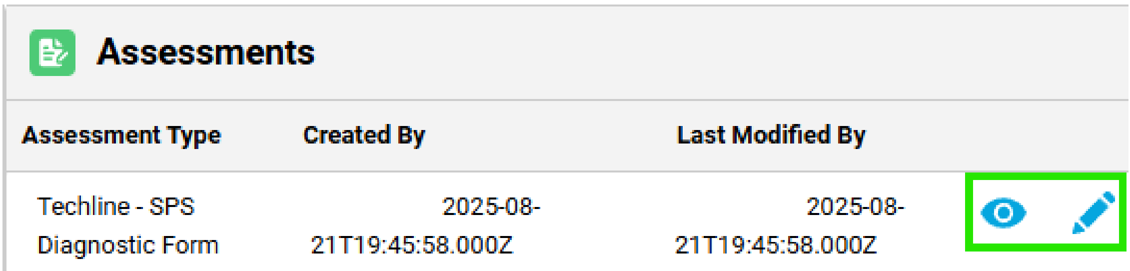


13. Fill out the fields in the assessment. Fields with a red asterisk (*) are required fields. Filling out all fields with the appropriate information will help the advisor better assist in resolving your concern. Once the fields are completed, click **Save**.

NOTE: Assessment fields may be different for each assessment.



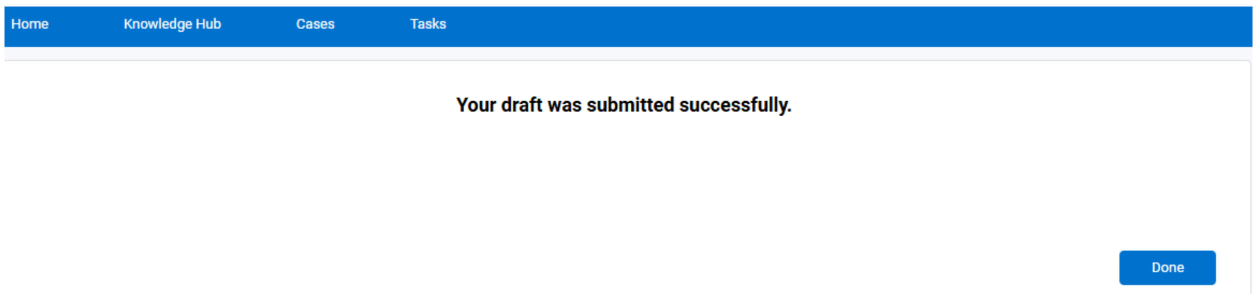
14. You can click the **Eye** icon to view your assessment, or the **Pencil** icon if you need to edit it.



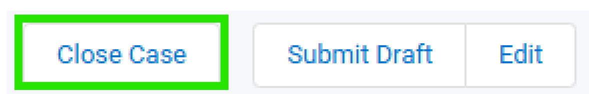
Submitting a Case

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.



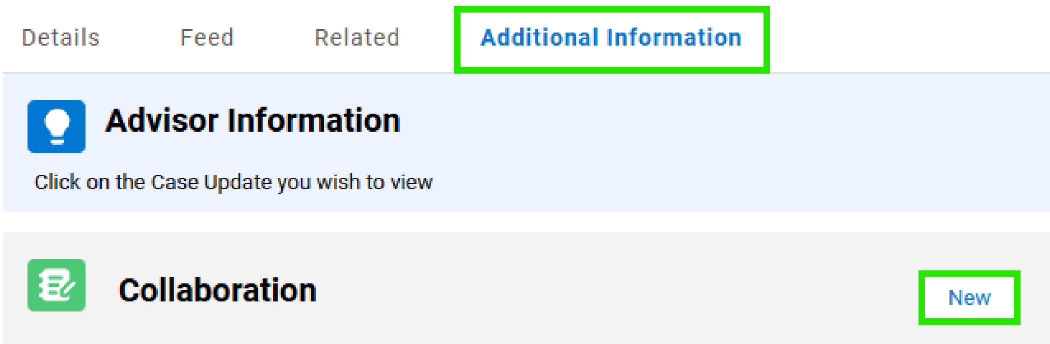
NOTE: If the draft case is not needed, please close the Draft with **Close Case** button:



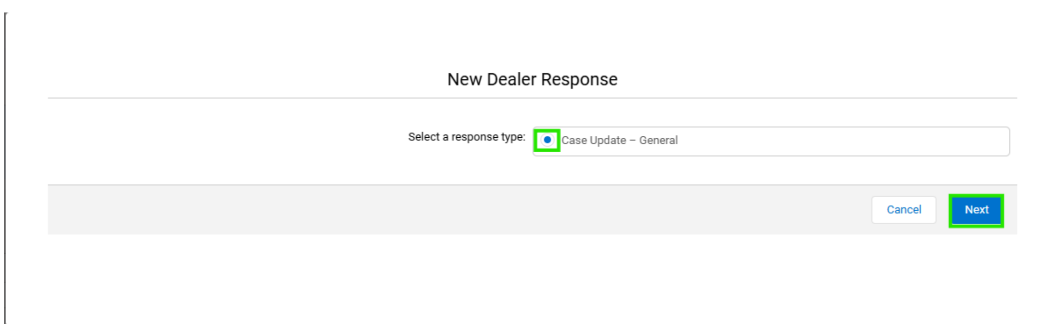
16. You have successfully submitted your case. Your case will be routed to the proper team for support.

Updating a Case

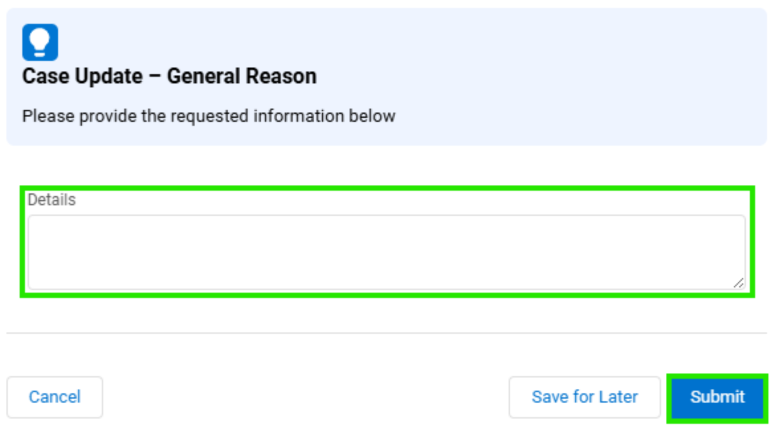
1. To send a case update to the dealer support team assigned to your case, navigate to the **Additional Information** tab, and locate **Collaboration**. Click **New** next to the **Collaboration** area.



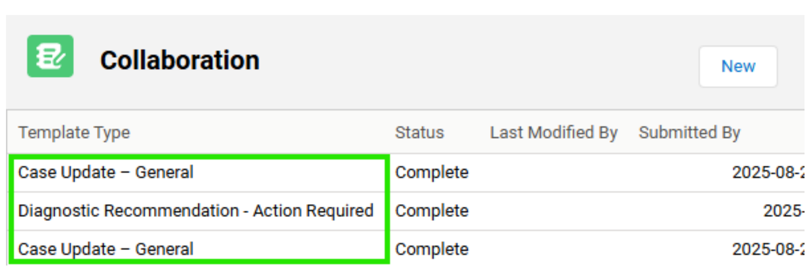
2. A **New Dealer Response** splash screen will appear. Click the radio button next to **Case Update – General** and click **Next**.



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



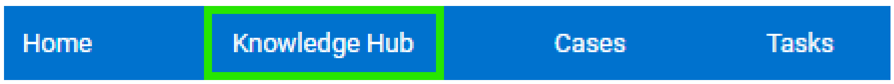
4. You can view your updates, as well as updates provided from the dealer support team, under **Collaboration**. Clicking Collaboration will display the direction or details that the advisor has provided. You will be notified by the notification bell at the top right of CX Connect for advisor collaborations.



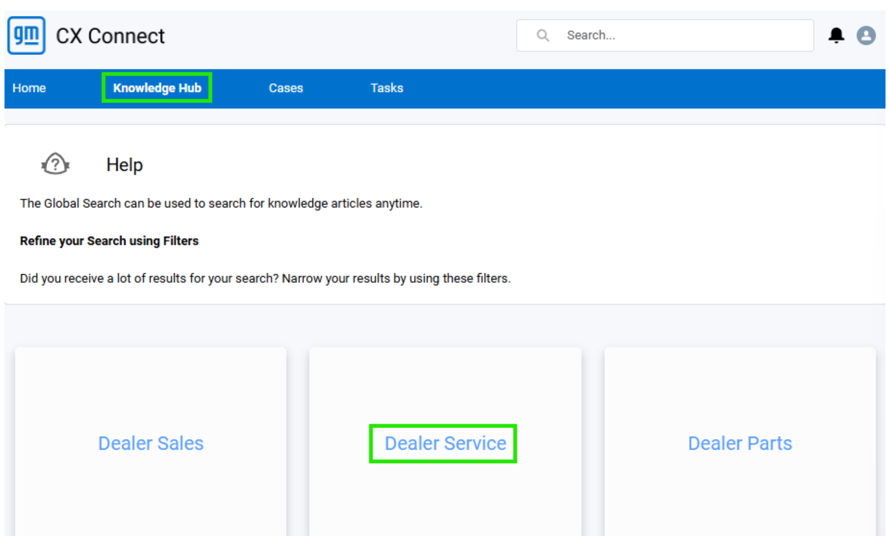
NOTE: Collaboration is the intended area for case updates between dealer and advisor. For a cohesive experience, please use the appropriate collaboration field when making case updates.

Accessing Dealer Resolutions

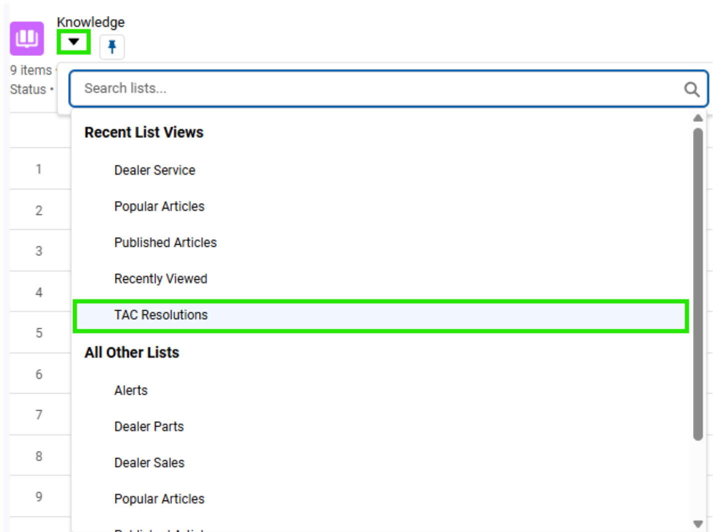
1. To access dealer resolutions, navigate to the **Knowledge Hub** tab in the navigation bar.



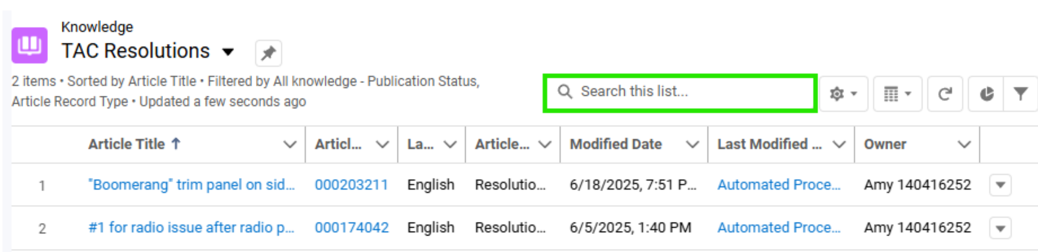
2. In the **Knowledge Hub**, select **Dealer Service**.



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



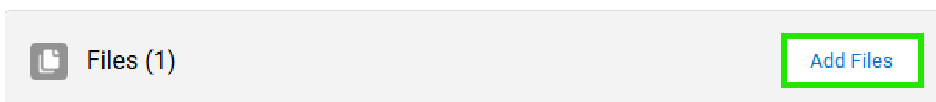
4. You can now search for resolutions in the **Search** bar.



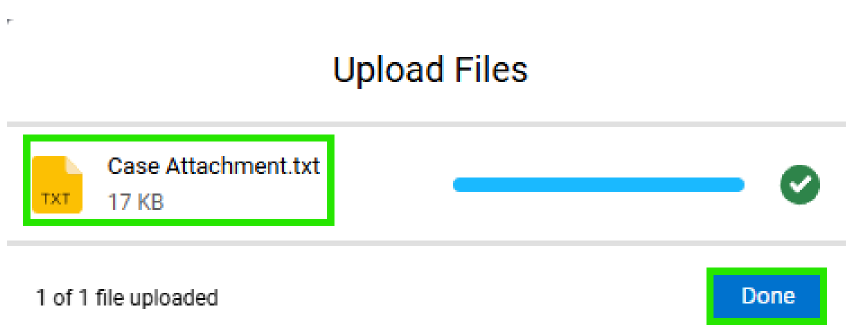
Attaching Files

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

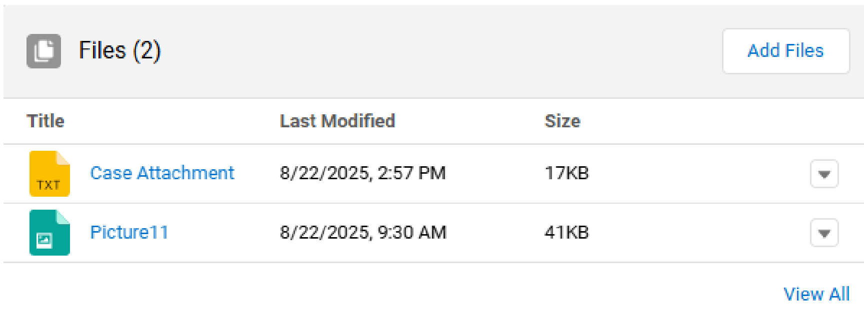
2. In the **Related** tab, click **Add Files**.



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.



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.