DynamicsShop.com

Making Business Make Sense
with Microsoft Dynamics 365

Dynamics .com Shop

Apps and Automation

On Microsoft Dynamics 365

DynamicsShop is a trading name of Simply Dynamics Ltd

User Guide

SD Case Manager

1 Contents

2 Getting Started

SD Case Manager provides users with a highly flexible means of logging and tracking various entities and items as Cases.

Cases can encompass entities such as:

- Customer Complaints,
- Ticketing Systems,
- Quality Control
- Internal and External Non-Conformance or other continuous improvement company processes.

The different streams of Cases are grouped into Queues. Using Queues in SD Case Manager, you can set up a flexible means of creating user-definable workflows and to-do Actions for the Cases in the Queue. These user-definable workflows and to-do Actions for the Cases in the Queue are managed and defined using Queue Statuses and Action Types.

Using Templates in SD Case Manager, you can define your list of standard steps and create Template Case Actions and attach Template files for recurring Case Actions. When a Case is created, or updated, within a Queue that has a defined Template, or, when a Category that has a defined Template is added to or updated on a Case, these Template Case Actions (and any files attached to the Template Case Action) are automatically created on the Case.

SD Case Manager also allows you to set up user-definable and configurable Escalation Rules to escalate Cases by sending emails or by creating notifications for Users Assigned to any incomplete Case Actions or to any Watchers of a Case. Escalation Rules can also be defined to add Watchers to a Case. Each Escalation Rule has conditions that must be met before its Escalation Action is run.

This flexibility allows SD Case Manager to log and track Case Actions and resolutions for different streams of Cases in various concurrent ways: as a Ticketing System to log issues; as a Customer Complaints system to log customer complaints; as a Customer Service system; as a Quality Control system to log and track non-conformance issues; as a system to log various internal and external company Non Conformance processes and issues.

3 Security Setup

We have provided the following permission sets for SD Case Manager: SD-CASE ADMIN, SD-CASE MGR, SD-CASE USER and SD-CASE VIEW *(Figure 3-1)*.

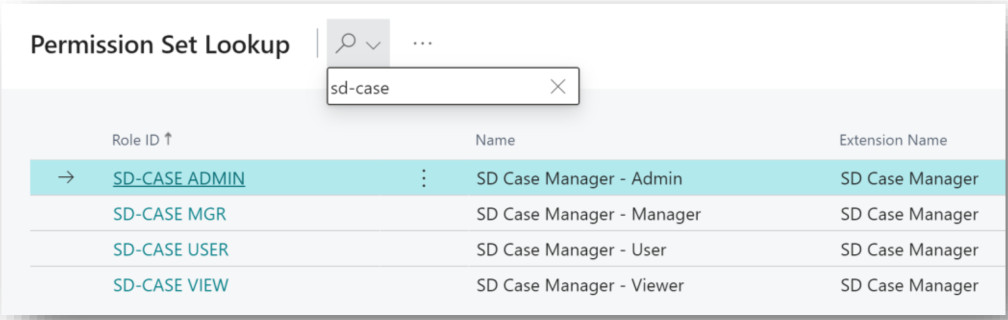


Figure 3-1

4 Installing SD Case Manager

To install **SD Case Manager** from the Business Administration Shell:

1. Run the **Business Central Administration Shell** as **Administrator**.

2. To publish the extension from the package file (.app), use the **Publish-NAVApp cmdlet**.

   Example:
   Publish-NAVApp -ServerInstance BC170 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd_SD Case Manager_3.0.6.0.app"

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

   Example:
   Sync-NavApp -ServerInstance BC170 -Name "SD Case Manager"

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

   Example:
   Install-NAVApp -ServerInstance BC170 -Name "SD Case Manager"

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-1)*.

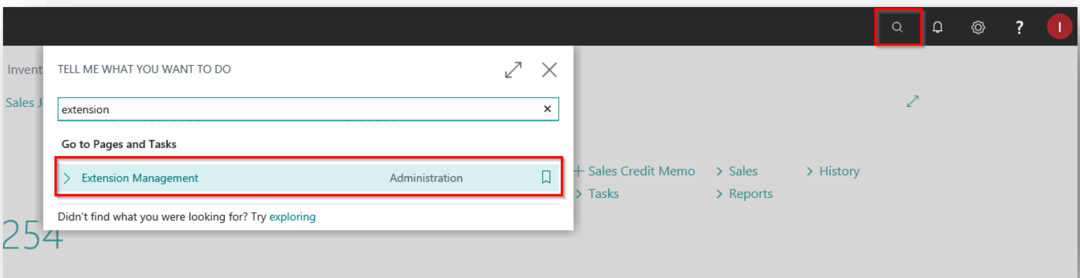


Figure 4-1

6. In the **Extension Management** list, you should see the **SD Case Manager App** installed.

4.1 Allowing HttpClient Requests in SD Case Manager

Switching on the **Allow HttpClient Requests** option allows SD Case Manager to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-2)*.

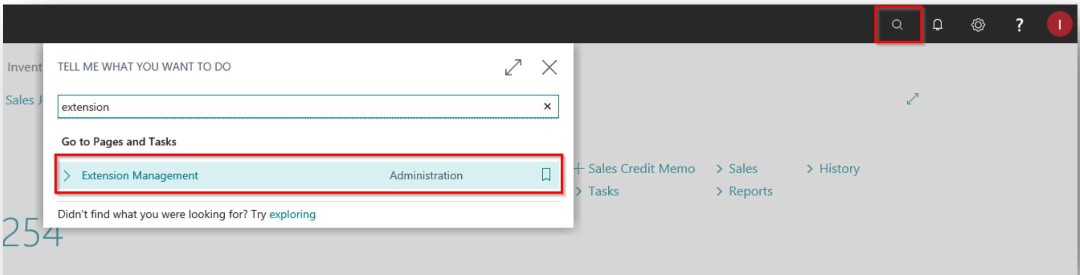


Figure 4-2

2. In the **Extension Management** list, you should see the **SD Case Manager** App installed (*Figure 4-3*).

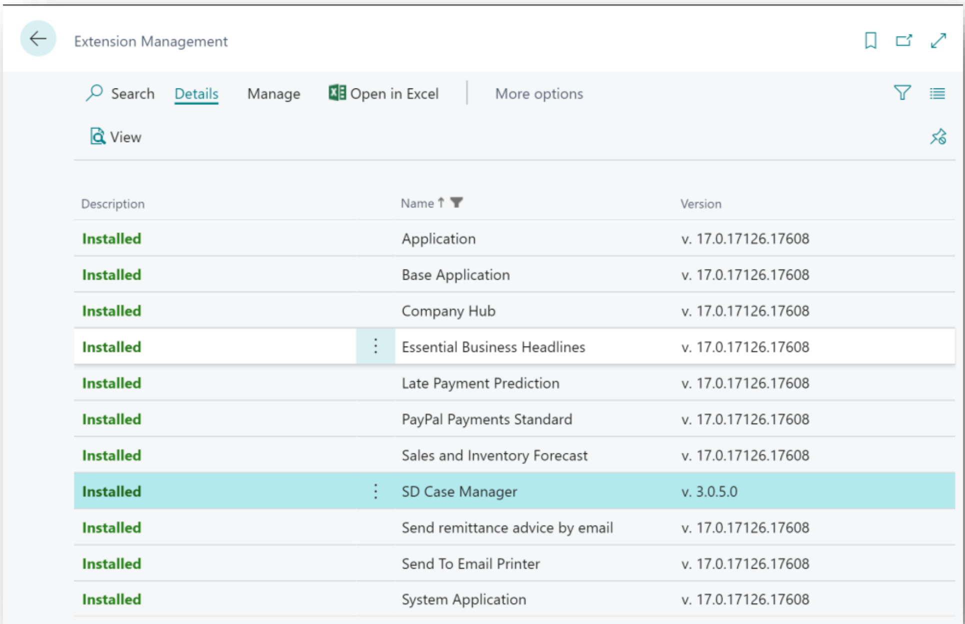


Figure 4-3

3. Select the **SD Case Manager App** record and from the menu, select the **Manage** group, and choose **Configure** (*Figure 4-4*).

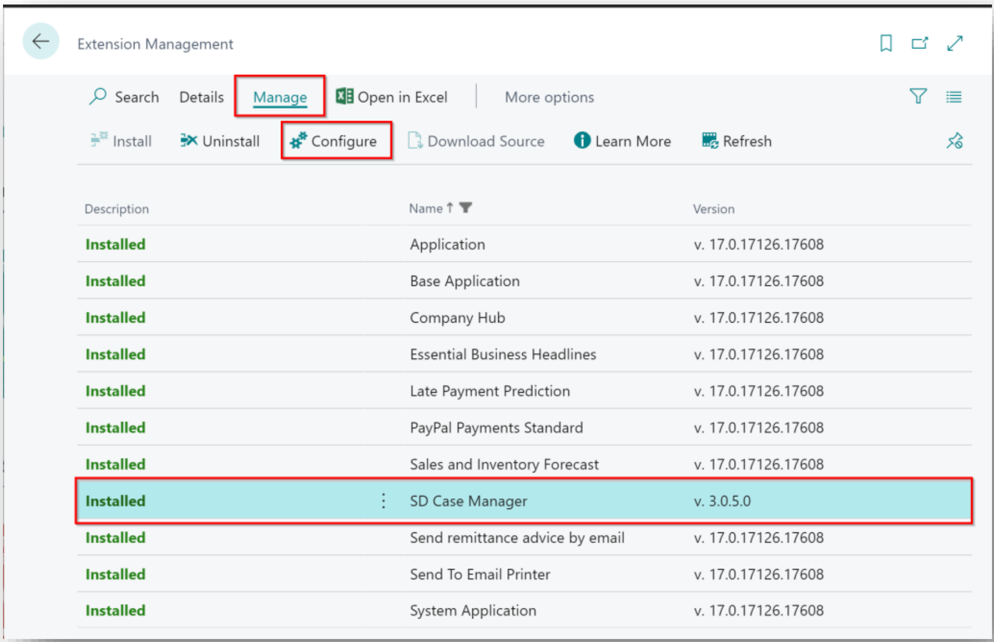


Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option (*Figure 4-5*).

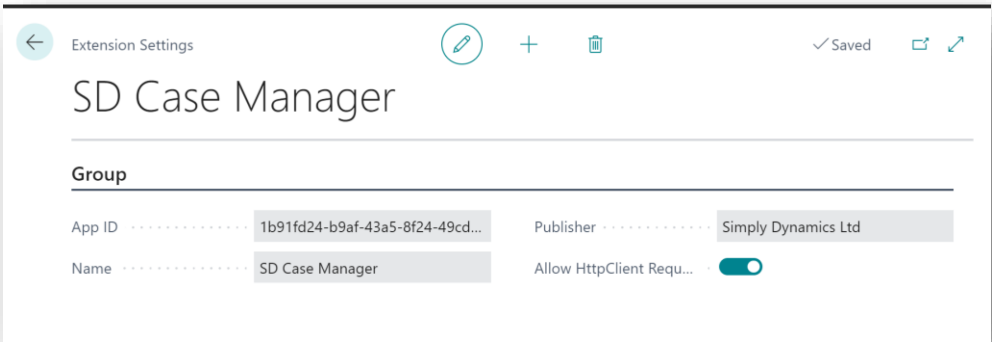


Figure 4-5

4.2 Choosing the SD Case Manager Role

We have provided two Role Centres for SD Case Manager: a Manager Role Centre and a User Role Centre. In the example below, we'll select the Manager Role Centre.

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 4-6)*.

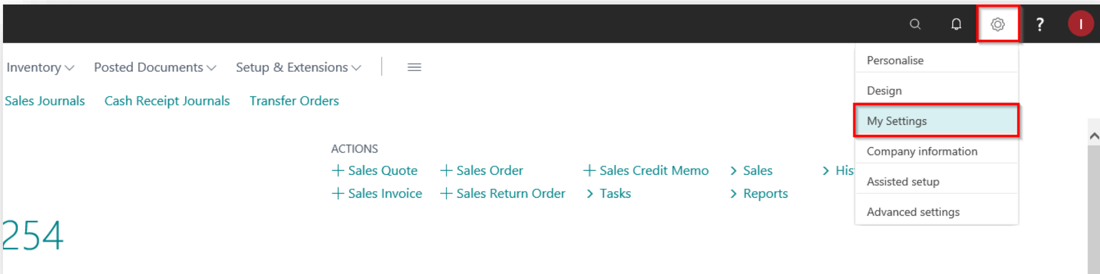


Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 4-7)*.

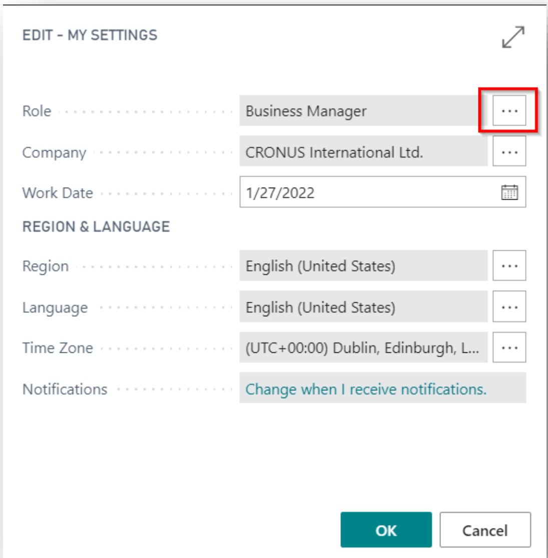


Figure 4-7

3. You should see **SD Case Manager Manager** in the list of Roles *(Figure 4-8)*.

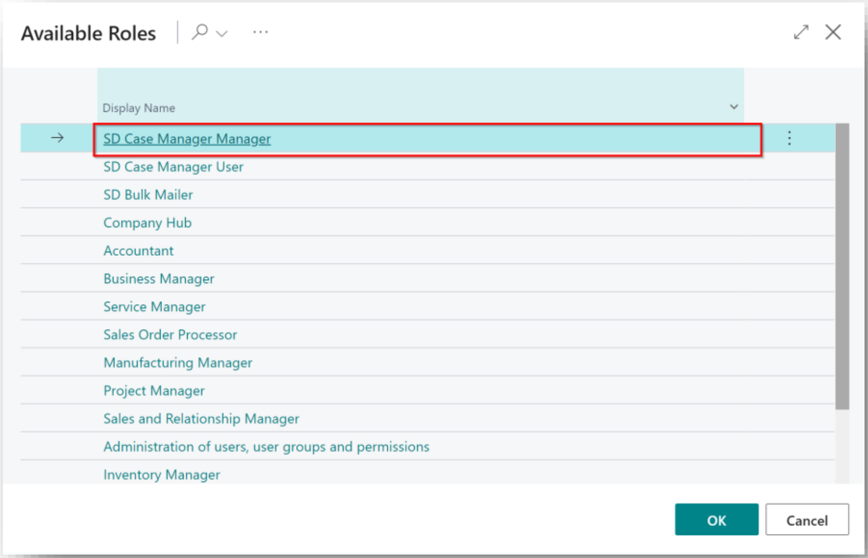


Figure 4-8

4. Choose **SD Case Manager Manager** and click **OK**.

5. The **SD Case Manager Manager** Role should now be displayed in the **Role** field *(Figure 4-9)*.

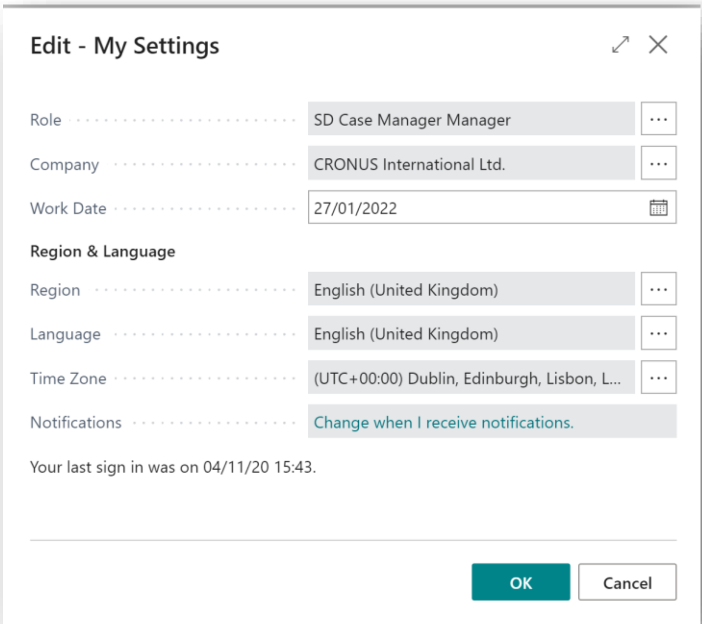


Figure 4-9

4.3 Accessing the SD Case Manager Pages

Use the **Tell Me** to search for SD Case Manager pages. Begin typing **SD** or **Case** to see a list of the SD Case Manager pages *(Figure 4-10)*.

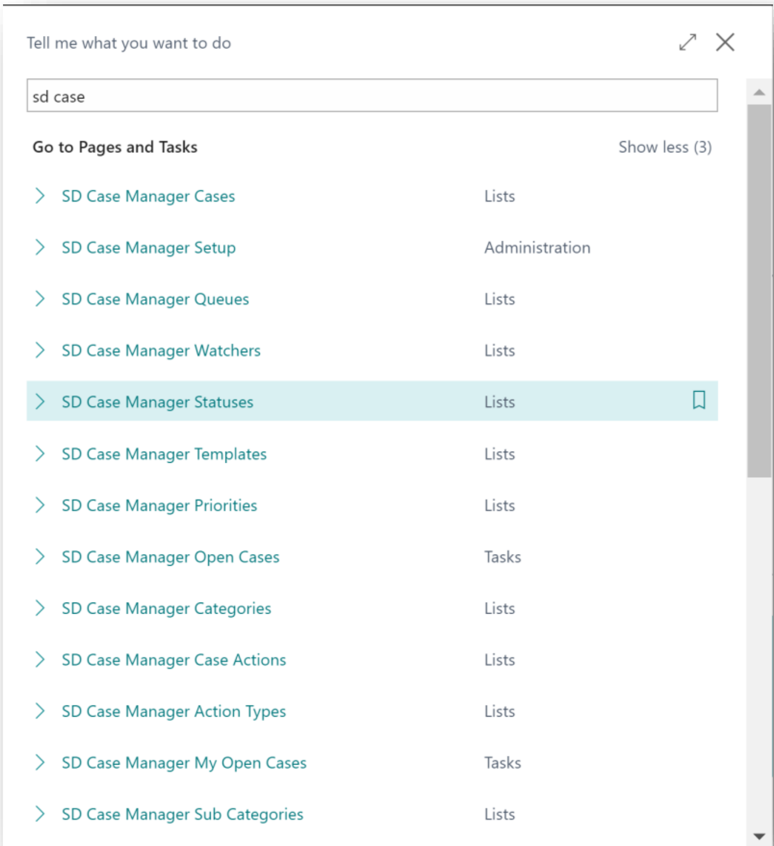


Figure 4-10

4.4 Activating the SD Case Manager Licence

To use SD Case Manager, you must activate the licence.

1. From the Tell Me, search for and select the **SD Case Manager Setup** page.

2. When the **SD Case Manager Setup** page opens, you will be prompted that "Your license is invalid". Choose **OK** *(Figure 4-11)*.

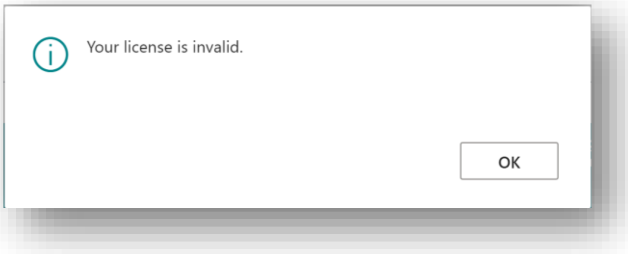


Figure 4-11

3. You will be prompted that "Your SD Case Manager license needs to be validated". Choose **Yes** *(Figure 4-12)*.

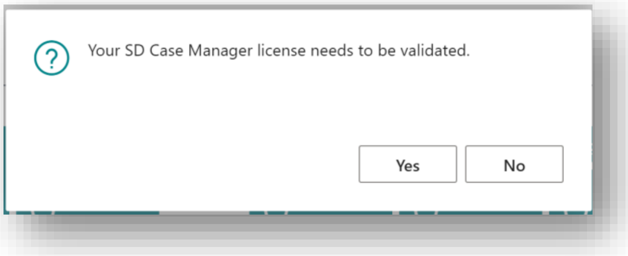


Figure 4-12

4. You will then see the "Activate your product" page below *(Figure 4-13)*.

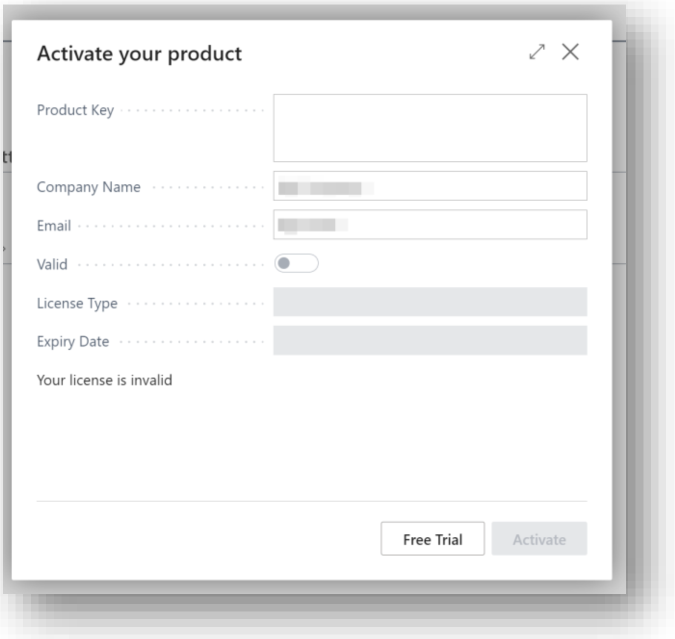


Figure 4-13

4.4.1 Activating the SD Case Manager Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd. *(Figure 4-14)*.:

1. Paste the supplied product key into the Product Key field.

2. Enter your company name in **Company Name**

3. Enter your company email value in **Email**

4. Choose **Activate**

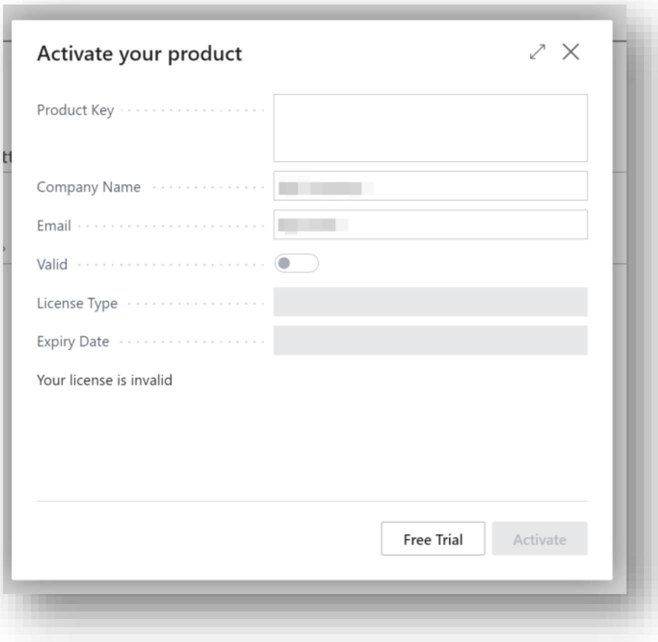


Figure 4-14

5. The “Activate your product” page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial *(Figure 4-15)*.

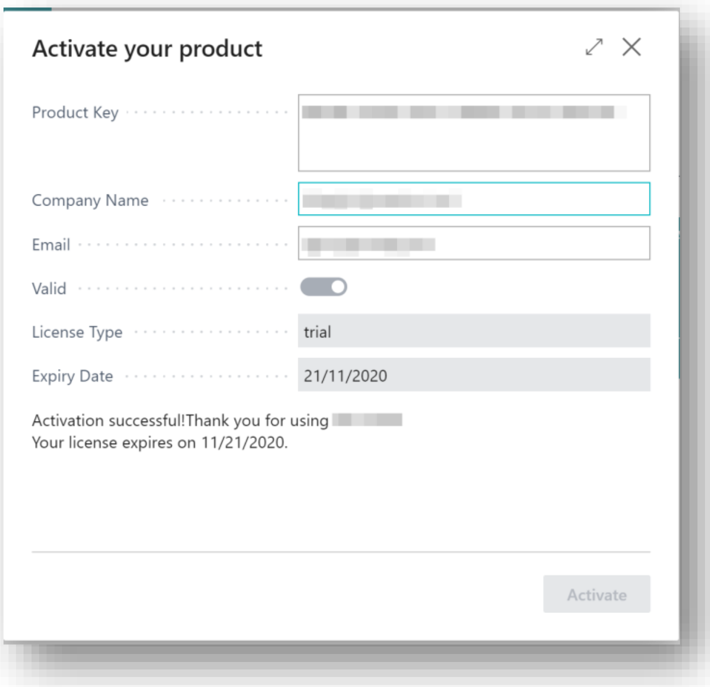


Figure 4-15

4.4.2 Activating the SD Case Manager Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial *(Figure 4-16)*:

1. Enter your company name in **Company Name**
2. Enter your company email value in **Email**
3. Choose **Free Trial**

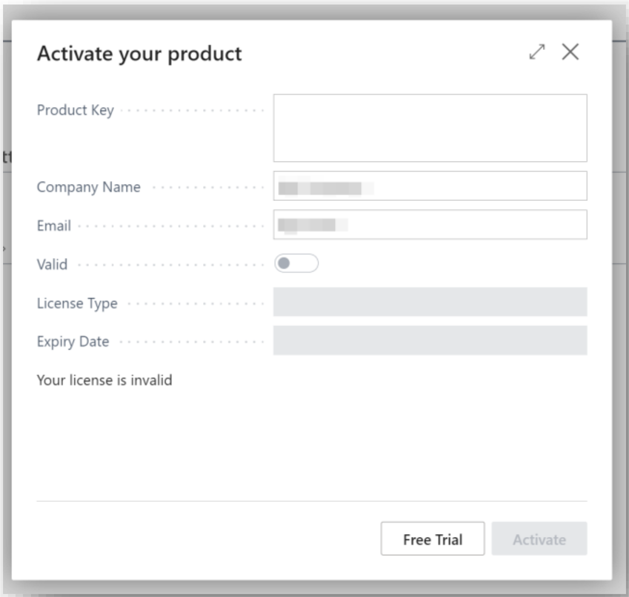


Figure 4-16

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes.**
5. The "Activate your product" page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial *(Figure 4-17)*.

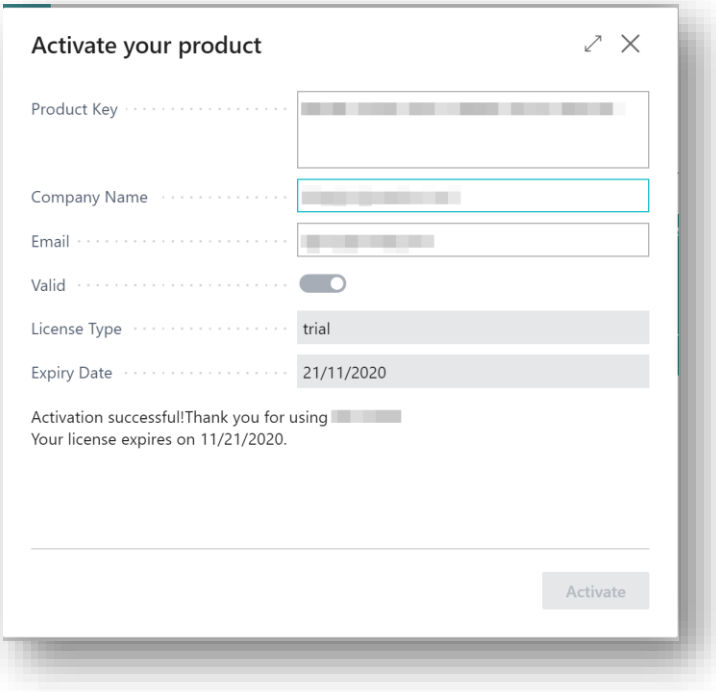

Activate your product
Product Key
Company Name
Email
Valid
License Type
trial
Expiry Date
21/11/2020
Activation successful!Thank you for using
Your license expires on 11/21/2020.
Activate

Figure 4-17

5 Uninstalling SD Case Manager

You can uninstall **SD Case Manager** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 5-1)*.

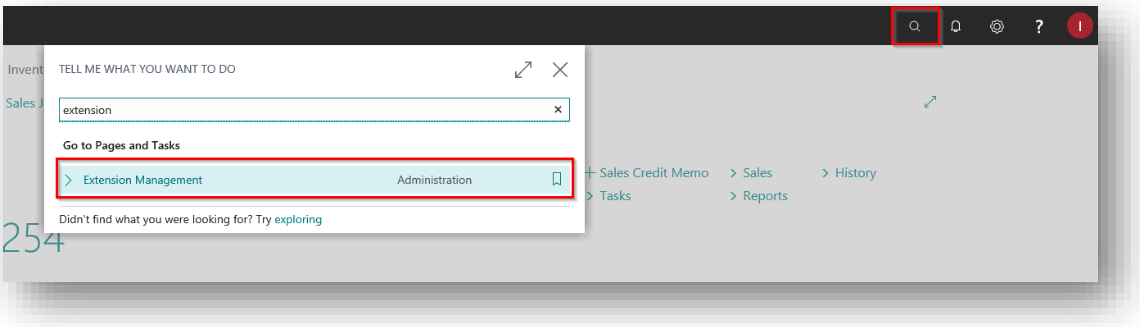


Figure 5-1

2. In **Extension Management**, you should see the **SD Case Manager** App installed.

3. Select the **SD Case Manager** App and choose the **Uninstall** Action (*Figure 5-2*).

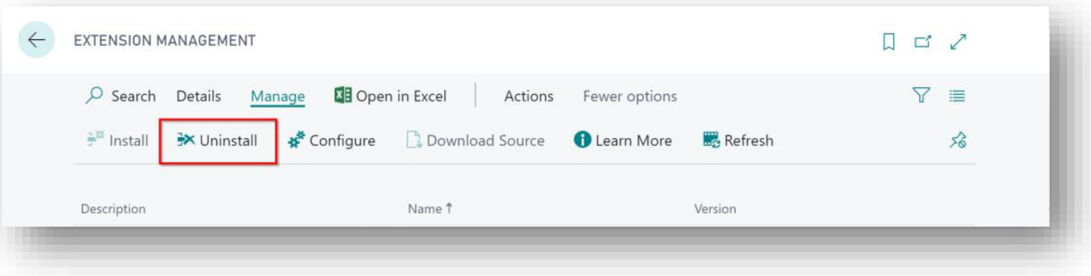


Figure 5-2

6 Upgrading from v3.0.5 to v3.0.6 of SD Case Manager

Version 3.0.5 of SD Case Manager uses the details in the standard Dynamics 365 Business Central **SMTP Mail Setup** page to deliver emails generated by executing escalation rules.

Version 3.0.6 of SD Case Manager uses the details in the standard Dynamics 365 Business Central **Email Accounts** page to deliver emails generated by executing escalation rules.

7 Setup and Configuration

7.1 SD Case Manager Assisted Setup

You can easily import default setup for SD Case Manager using the **Assisted Setup** Action on the **SD Case Manager Setup** page.

1. In the **SD Case Manager Setup** page, from the menu choose the **Process** group, and then **Assisted Setup** *(Figure 7-1)*.

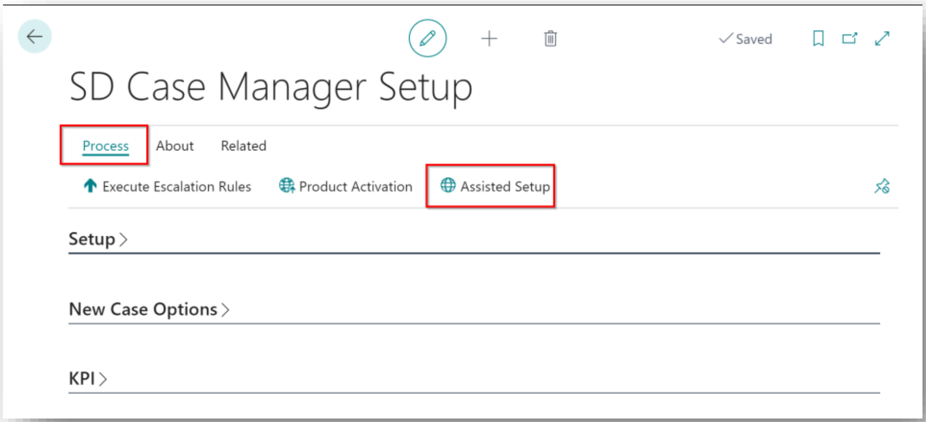


Figure 7-1

2. You are prompted that “Importing setup will delete all of the existing data in SD Case Manager. Press **Yes** to proceed.” Choose **Yes** if this is your first time to use SD Case Manager and you have not already created any setup in SD Case Manager *(Figure 7-2)*.

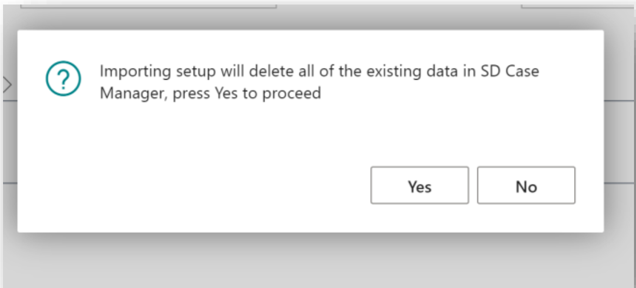


Figure 7-2

3. You are then prompted, “Are you sure?” Choose **Yes** *(Figure 7-3)*.

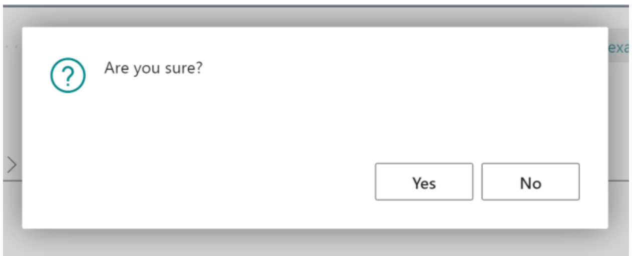


Figure 7-3

4. You will then receive a prompt similar to the below that the default setup has imported. Choose OK *(Figure 7-4)*.

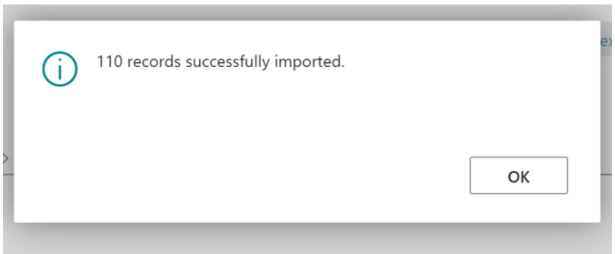


Figure 7-4

8 Understanding SD Case Manager Concepts

As mentioned above, SD Case Manager provides a flexible means of logging and tracking various entities and items as Cases.

Cases can encompass entities such as:

- Customer Complaints,
- Ticketing Systems,
- Quality Control
- Non-Conformance issues

Using Queues in SD Case Manager, you can set up a flexible means of creating user-definable workflows and to-do Actions, for the Cases in the Queue, using Statuses and Action Types.

Using Templates in SD Case Manager, you can define your list of standard steps and create Template Case Actions (with or without attached files) to your user-defined case actions. When a Case is created, or updated, within a Queue that has a defined Template, or, a Category that has a defined Template is added to or updated on a Case, these Template Case Actions (and any files attached to the Template Case Action) are automatically created on the Case.

SD Case Manager also allows you to set up user-definable and configurable Escalation Rules to escalate Cases by sending emails or notifications to Users Assigned to incomplete Case Actions, Case Managers, and Watchers of a Case.

Escalation Rules can also be defined to add Watchers to a Case. Each Escalation Rule has conditions that must be met before its Escalation Action is run.

8.1 Queues

A Queue is a transactional queue or stream of Cases in SD Case Manager (*Figure 8-1*).

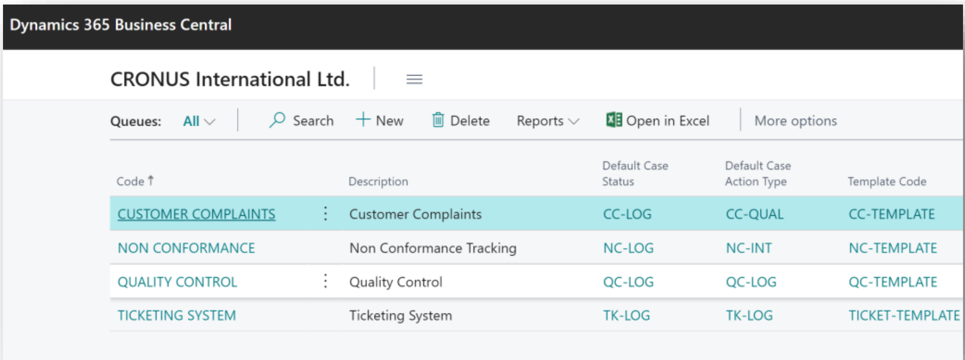


Figure 8-1

Each Queue can have multiple Cases. Using Queues, you can set up flexible user-definable workflows (using Statuses and Action Types) for Cases within the Queue. An example of a Queue could be a Ticketing System Queue or a Customer Complaint Queue.

With each Queue you can set up Statuses and assign and update the Statuses on the Case as it progresses through the Queue's workflow.

Within SD Case Manager you can also set up Action Types that allow you to define and log Actions for a Case. You can then assign these Actions to an Assigned User.

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to: Users Assigned to incomplete Case Actions; Managers; and Watchers of the Case. Escalation Rules can also be defined to add Watchers to a Case.

Cases can move between Queues.

8.2 Cases

A Case provides a means of logging and tracking various entities and items. Cases can encompass various and multiple entities such as customer complaints, issues, or internal and external company processes (*Figure 8-2*).

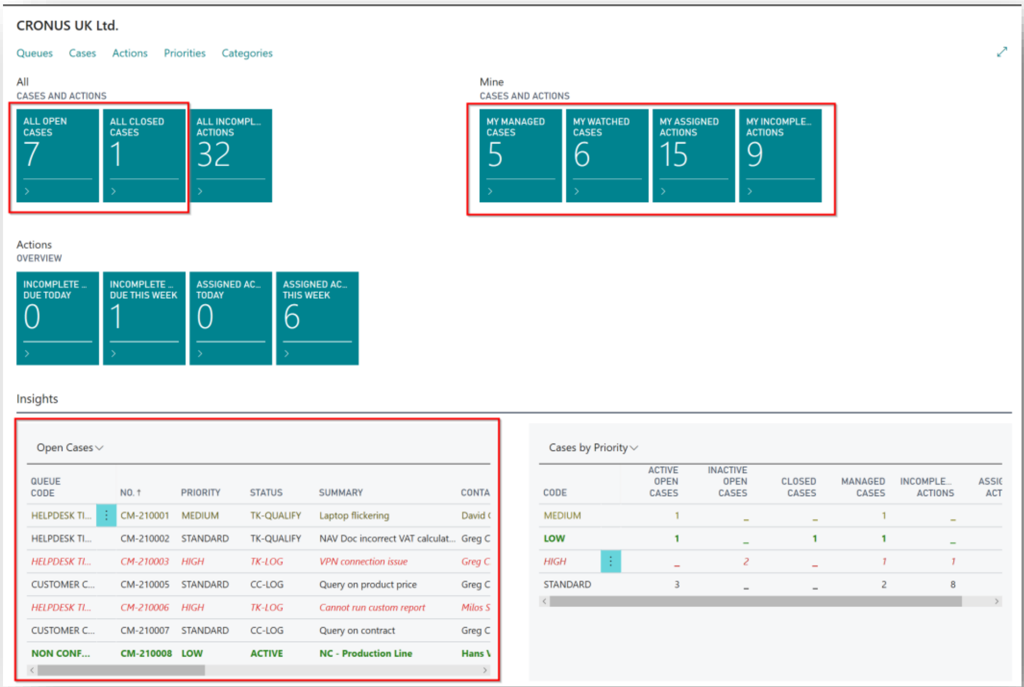


Figure 8-2

Users can update and progress the Case through the user-definable workflow as defined in the Queues and can log and update Actions against the Case and assign these Actions to an Assigned User.

8.3 Case Statuses

Case Statuses allow you to define user-definable workflows for the Cases. These are set up on the Queue Card. Case Statuses can be applied only to those Cases within the particular Queue (*Figure 8-3*).

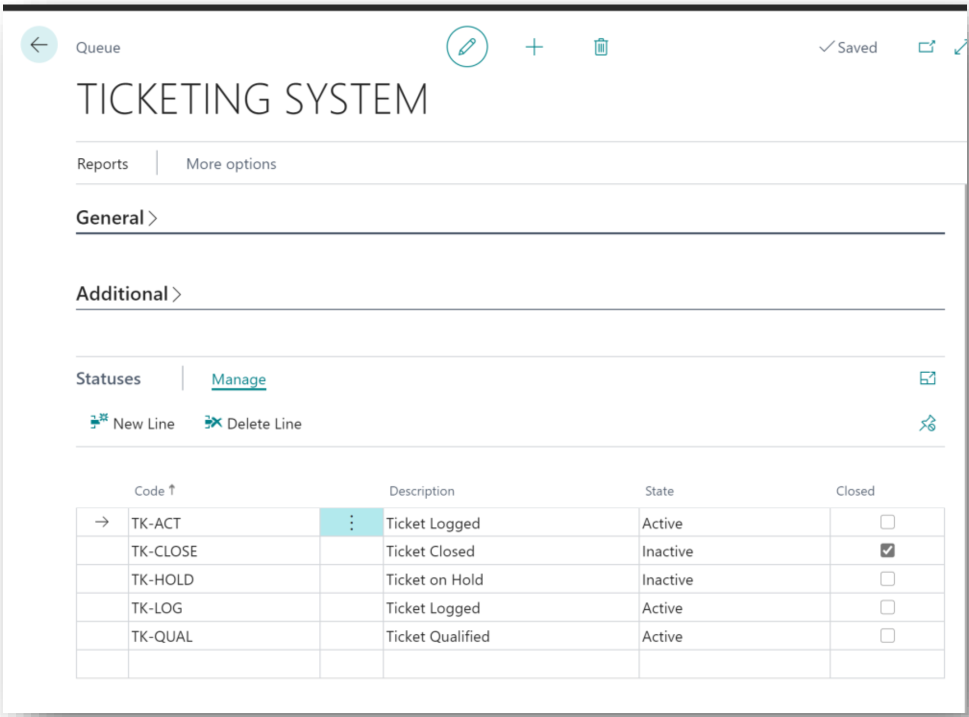


Figure 8-3

Using Case Statuses allows you to specify if the State of the Case Status is defined as Inactive or Active, or, if the Case Status is defined as Closed.

Once a Case is in a particular Queue, you can then assign and update the Statuses of the Case on the Case Card as it progresses through the user-definable workflow defined using the Statuses and the global Action Types.

8.4 Action Types

Action Types allow you to define user-definable Action Types for Cases. Action Types are defined globally in SD Case Manager (*Figure 8-4*).

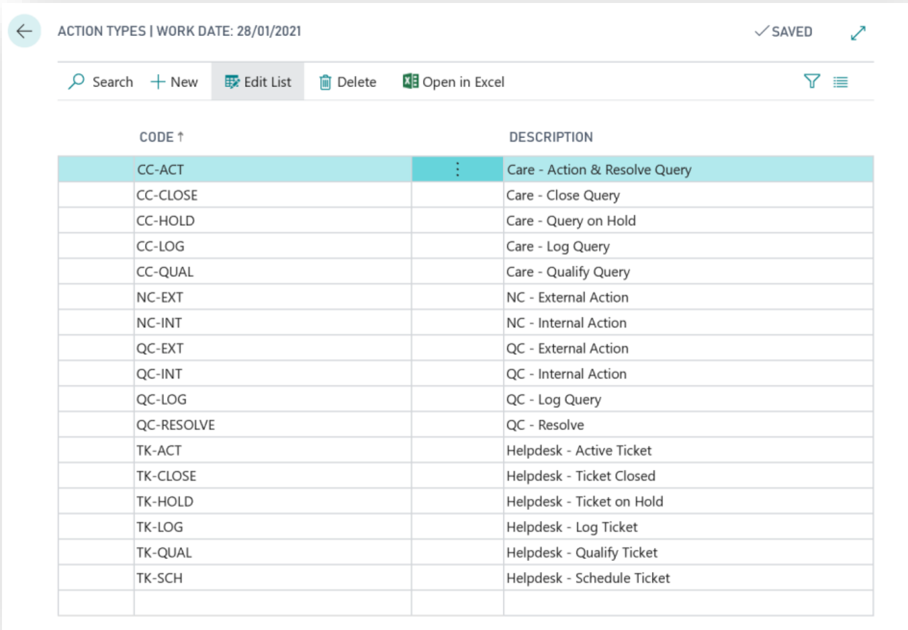


Figure 8-4

Case Action Types can be used when creating an Action for a Case and are available for Cases across all Queues. When creating an Action for a Case, you specify the Action Type for which you are logging the Action.

By defining an Interaction Group on the Queue Card, you can create Interaction Log Entries when a Case Action is created for Cases within a particular Queue.

You can also easily create Links between a Case Action and any record(s) in Microsoft Dynamics 365 Business Central.

8.5 Watcher

Watchers can be assigned to individual Cases. A Watcher can be a User Watcher or an Email Watcher (*Figure 8-5*).

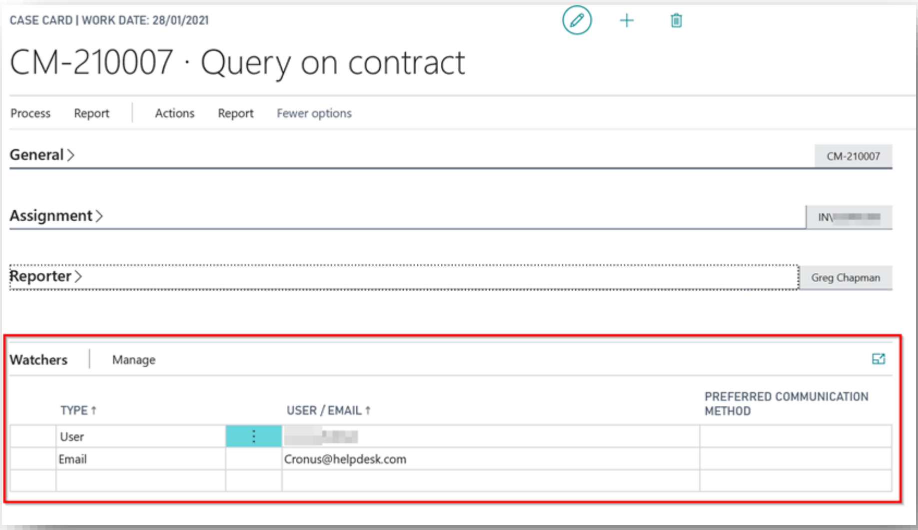


Figure 8-5

Escalation Rules can be defined on the Queue Card to escalate Cases by notifying the Watchers of the Case, by emailing the Watchers of the Case, or by adding specified Watchers to the Case, once certain specific Escalation Rule criteria are met.

You can also choose to define Default Case Watchers on the Queue Card. These Default Case Watchers will be auto inserted onto a Case when the Queue Code is selected on the Case Card.

8.6 Escalation Rules

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. Each Escalation Rule has conditions that must be met before its corresponding Escalation Action is run (*Figure 8-6*).

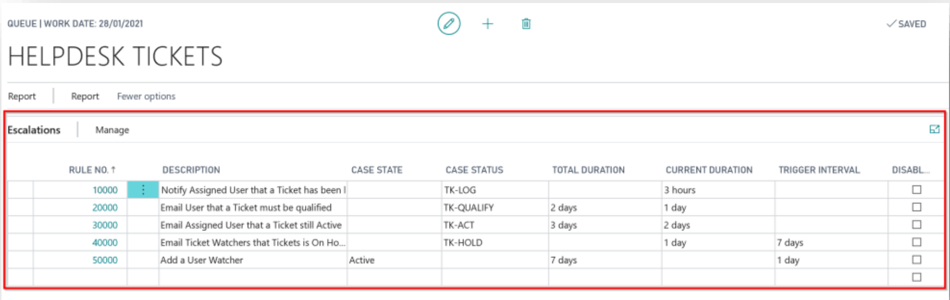


Figure 8-6

When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to the Users Assigned to incomplete Case Actions, Managers, and Watchers of the Case. The Escalation Rules also enable you to add specified Watchers to Cases.

8.7 Priorities

A Priority in SD Case Manager provides a means to logically and visually organise or prioritise Cases within SD Case Manager (*Figure 8-7*).

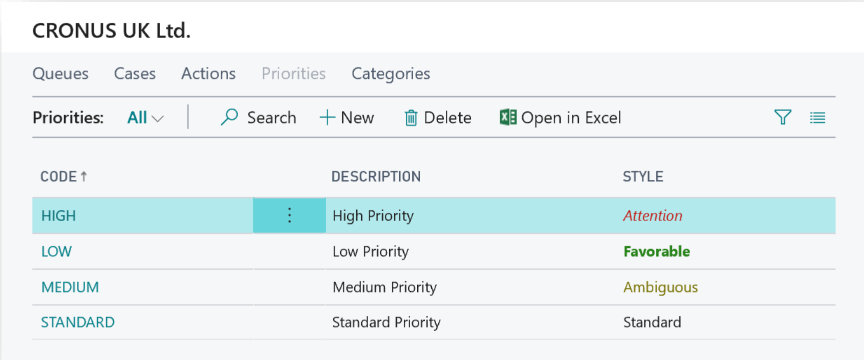


Figure 8-7

When setting up a Priority in SD Case Manager, you select the Microsoft Dynamics 365 Business Central Style Property that you wish to associate with the Priority.

You can then assign a Priority to a Case and the Priority's associated Style formatting is applied to records in the Case Lists, in the My Open Cases list, and the Action Lists for those Cases that are associated with the individual Priority.

8.8 Categories, Sub-Categories and Analysis Codes

Categories and Sub-Categories are used in SD Case Manager as a means of classifying and grouping Cases within Queues (*Figure 8-8*).

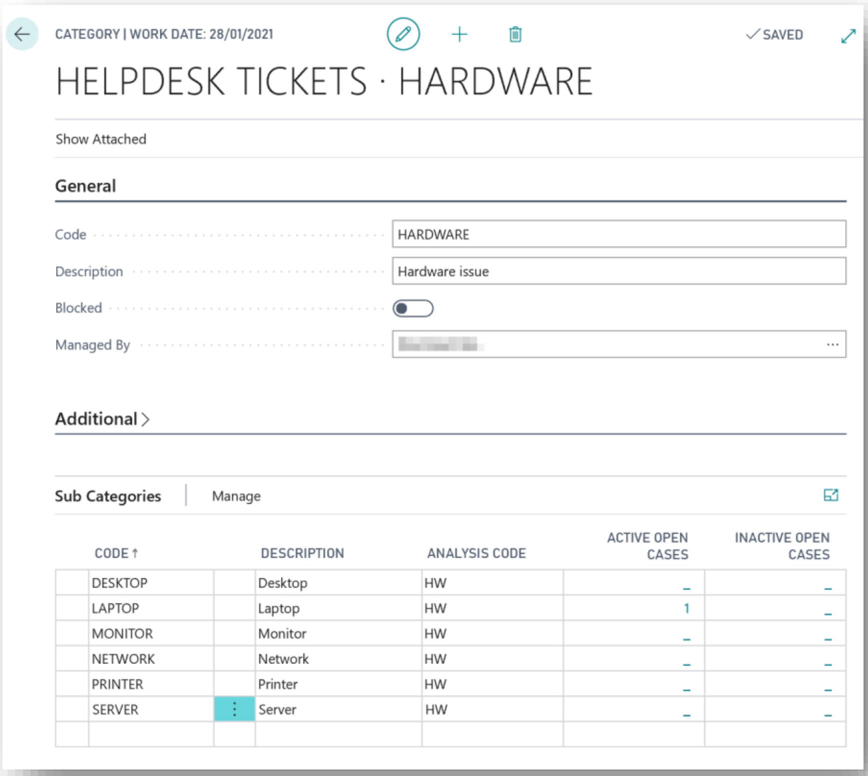
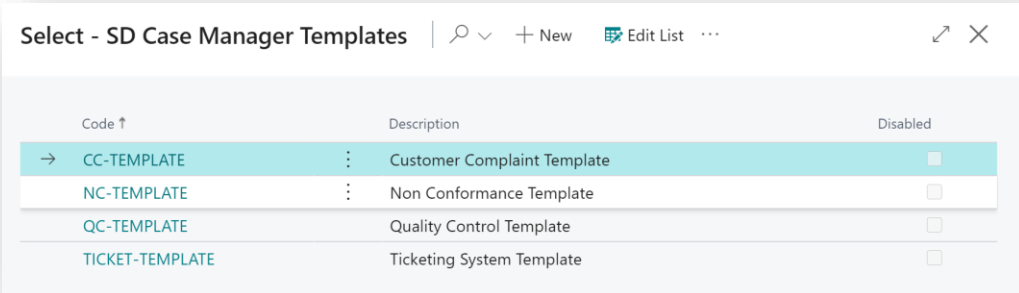


Figure 8-8

Analysis Codes are used in SD Case Manager as a means of classifying Cases across all Queues.

8.9 Case Templates

Case Templates allow you to define Template Case Actions that can be automatically logged with detailed comments and attached files to your Cases (*Figure 8-9*).


Select - SD Case Manager Templates

+ New   Edit List

Code ↑	Description	Disabled
CC-TEMPLATE	Customer Complaint Template	
NC-TEMPLATE	Non Conformance Template	
QC-TEMPLATE	Quality Control Template	
TICKET-TEMPLATE	Ticketing System Template	

Figure 8-9

Using Templates in SD Case Manager, you can define Template Case Actions, with or without attached files and detailed comments, to User-defined Case Actions.

Templates can be defined both against Queues and against Categories.

When a Case is created, or updated, within a Queue that has a defined Template, or, the Case has a Category that has a defined Template attached, these Template Case Actions (and any files or comments attached to the Template Case Action) are automatically created on the Case.

9 Using SD Case Manager

Once setup and configuration is complete, you can begin to create, update, and progress your Cases in SD Case Manager.

9.1 Setup

The **SD Case Manager Setup** page is accessed from the **SD Case Manager Manager Role Centre**, by selecting the **Setup** action, or, by searching for the **SD Case Manager Setup** page in the **Tell Me** *(Figure 9-1)*.

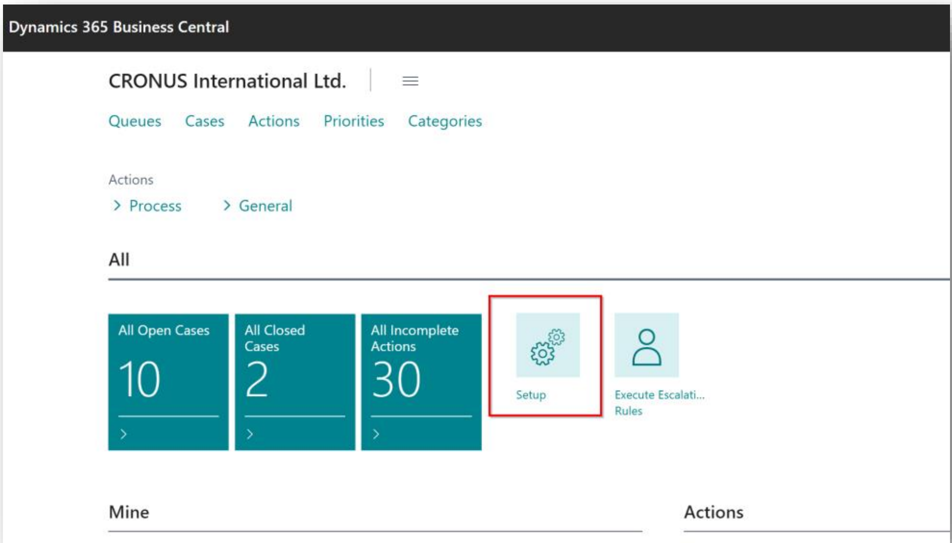


Figure 9-1

In the **SD Case Manager Setup** page, expand the **General** FastTab. The **General** FastTab contains the following fields (*Figure 9-2*):

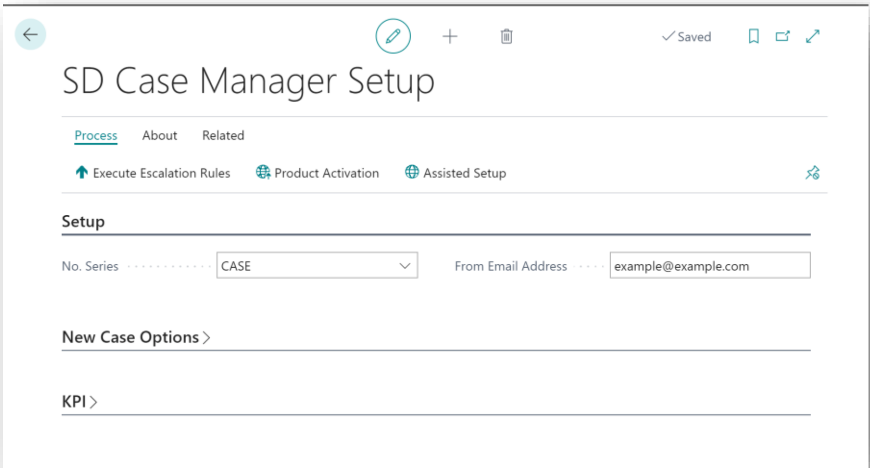


Figure 9-2

- **No. Series** – This field specifies the No. Series to be used when creating Cases in SD Case Manager.

- **From Email Address** – This field defines which Email Address to use as the From and Reply-To Address for Emails sent from SD Case Manager.

In the **New Case Options** FastTab (*Figure 9-3*):

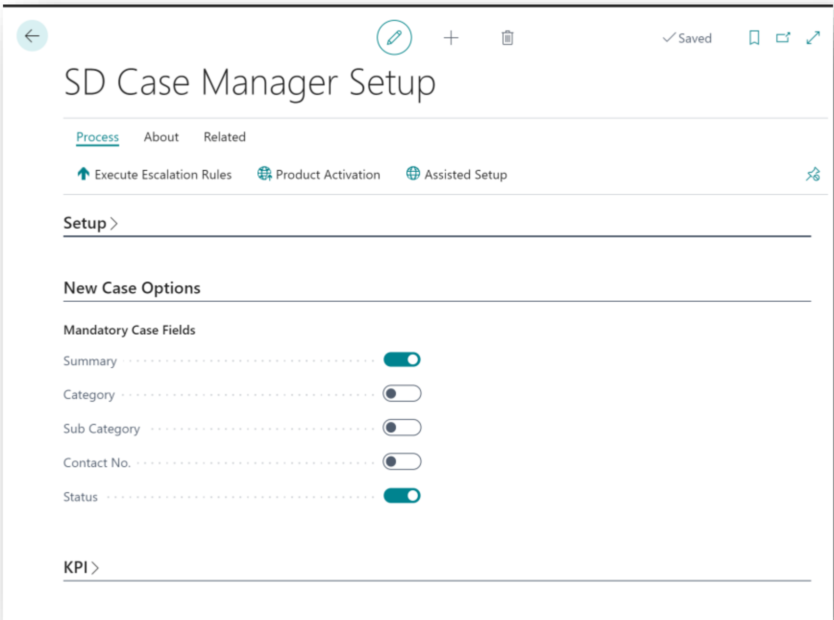


Figure 9-3

- **Mandatory Case Fields** – This option allows you to specify what fields must be entered on a Case Card before a Case can be saved.

  Select the options for those fields that you want to set as mandatory fields on a Case.

The **KPI Options** FastTab displays flowfield counts of the setup records that have been created in SD Case Manager. You can drill down on the flowfields to access the associated pages (*Figure 9-4*):

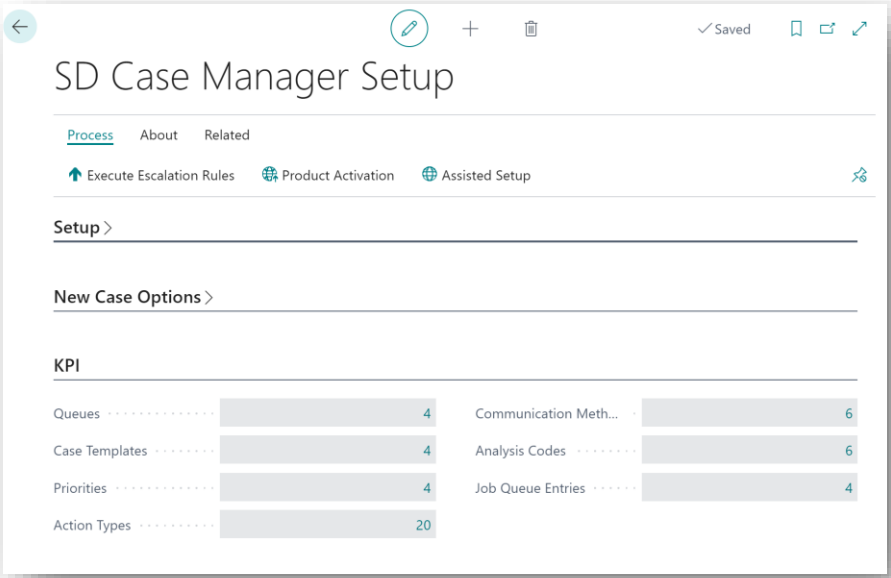


Figure 9-4

9.2 Queues

The Queues List Page is accessed from the **Case Manager Setup Page**. From the menu, in the **Related** group, choose **Queues**. You can also access the Queues List Page by searching the Tell Me.

The Queues List Page (*Figure 9-5*) is a list of all the Queues currently setup in SD Case Manager. This Queues List Page allows you to set up Queues and to define highly flexible user-definable workflows, using Statuses and Action Types.

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to Users Assigned to incomplete Case Actions, Managers, and Watchers of the Case, or, by adding specified Watchers to the Case.

You can also define a Template Code for each Queue. Defining a Template Code allows you to specify Template Actions that are automatically applied to each newly created Case in the Queue. (Please refer to the section in this document on Case Templates).

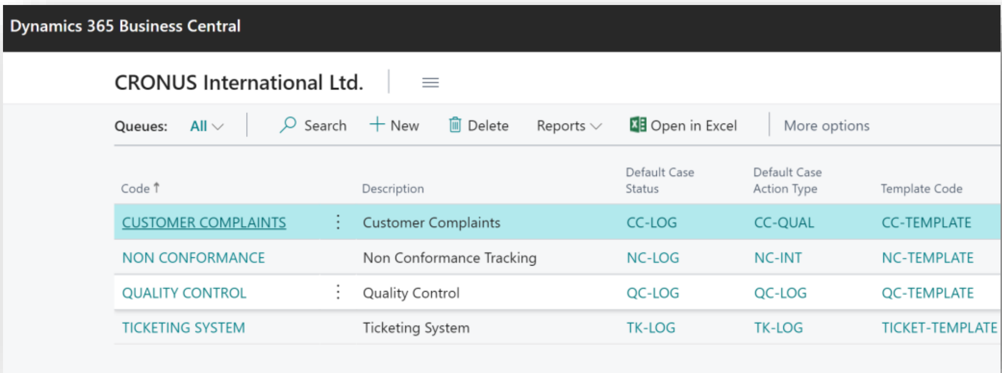


Figure 9-5

The Queues List Page displays the following fields:

- **Code** – The unique Code that identifies this Queue.
- **Description** - A user defined description of the Queue.

- **Default Case Status** - The Default Case Status specifies the default Status that a Case will have when first created within this Queue. (A Status can be set as the Default Case Status in the General FastTab Group on the Queue Card Page).

- **Default Case Action Type** - The Default Case Action Type specifies the default Action Type for Actions logged against Cases within this Queue. (An Action Type can be set as the Default Case Action Type in the General FastTab Group on the Queue Card Page).

- **Template Code** - The Template Code for the Queue. Defining a Template Code allows you to specify Template Actions that are applied to each newly created Case in the Queue. (The Queue Template Code is set in the Additional FastTab Group on the Queue Card Page).

To access an existing Queue from the Queue List Page, from the menu, in the **Manage** group, select **View** or **Edit**.

To create a new Queue, from the menu, select **New**.

The Queue Card Page contains the following fields in the **General** FastTab (*Figure 9-6*):

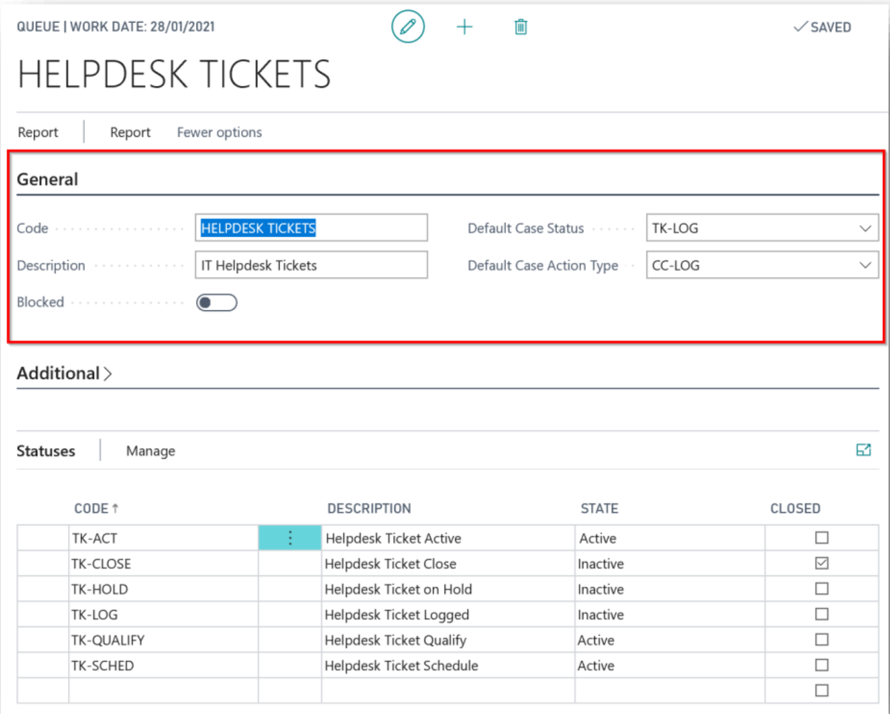


Figure 9-6

- **Code** – Enter a unique Code to identify the Queue.
- **Description** – This is a user-defined description of the Queue.
- **Blocked** - A Queue can be set to Blocked by selecting this checkbox. Setting a Queue to blocked prevents any new Cases from being created for the blocked Queue. You cannot create any New Actions for the blocked Queue, nor update existing Actions for Cases in the blocked Queue. Escalation Rules for Cases within the Blocked Queue will still be executed.
- **Default Case Status** - This field specifies the default Status that a Case will initially be set to when created within this Queue. The Case Status allows you to specify if the State of the Case Status on the Case is defined as Inactive or Active, or, if the Case Status on the Case is defined as Closed. Statuses are defined for each individual Queue on the Queue Card Page in the Statuses FastTab, (see below).
- **Default Case Action Type** - The Default Case Action Type specifies the default Action Type for Actions that are logged against Cases within this Queue. (Please see the section on **Action Types**).

Expand the **Additional** FastTab (*Figure 9-7*):

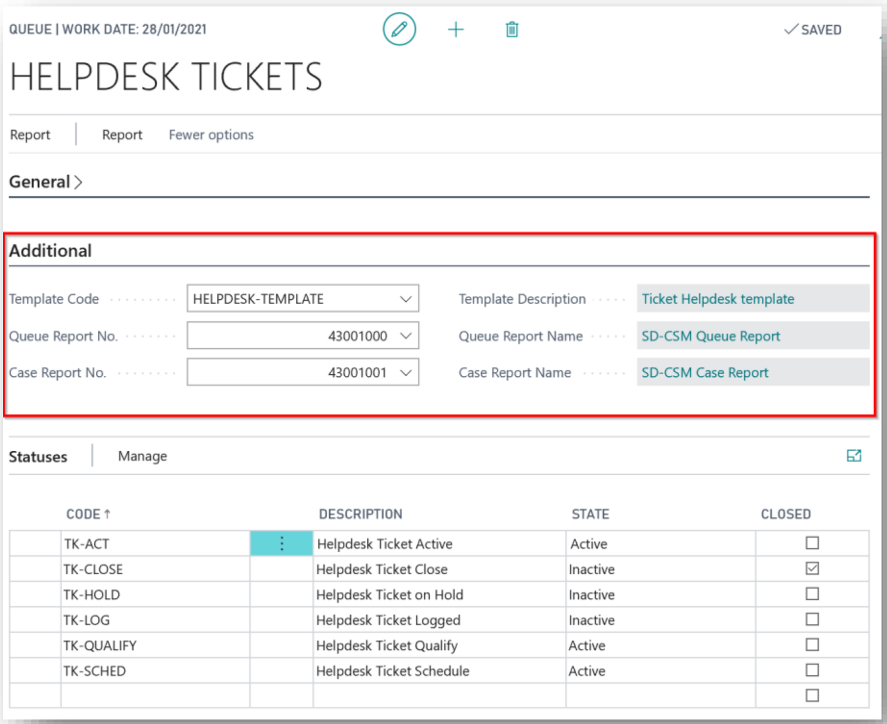


Figure 9-7

- **Template Code** - The Template Code for the Queue. Defining a Template Code allows you to specify Template Actions to automatically apply to Cases created in the Queue. (Please see the section on Case Templates).

- **Template Description** - Displays the description of the Template Code.

- **Queue Report No.** – This field defines the Report Object ID of the Queue Report. Choose from a list of Reports in your Microsoft Dynamics NAV Database. SD Case Manager is shipped with a pre-configured Queue Report, **SD-CSM Queue Report** (ID **43001000**). The Queue Report can be run from the Queues List Page or from the Queue Card Page by selecting the **Home** tab, **Report** group, **Queue Report**.

  When run, the Queue Report presents the User with a Report Action Page on which the User can filter down on the records in the Queue Table and in the Case Table upon which the report will run. The Queue Report will display, for the filtered records, the Queue Code and Description. The Case No, Case Description, Case Status, Case State and Case Closed.

- **Queue Report Name** - The name of the report selected in Queue Report No.

- **Case Report No.** - This field defines the Report Object ID of the Case Report. Choose from a list of Reports in your Microsoft Dynamics NAV Database. SD Case Manager is shipped with a pre-configured Case Report, **SD-CSM Case Report** (ID **43001001**). The Case Report can be run from the Queue List Page or from the Queue Card Page by selecting the **Home** tab, **Report** group, **Case Report**.

  When run, the Case Report presents the User with a Report Action Page on which the User can filter down on the records in the Case Table and in the Case Action Table upon which the report will run. The Case Report will display, for the filtered records, fields from the Case Card and a list of Actions logged against the Case.

- **Case Report Name** - The name of the report selected in Case Report No.

Expand the **Statuses** FastTab (*Figure 9-8*):

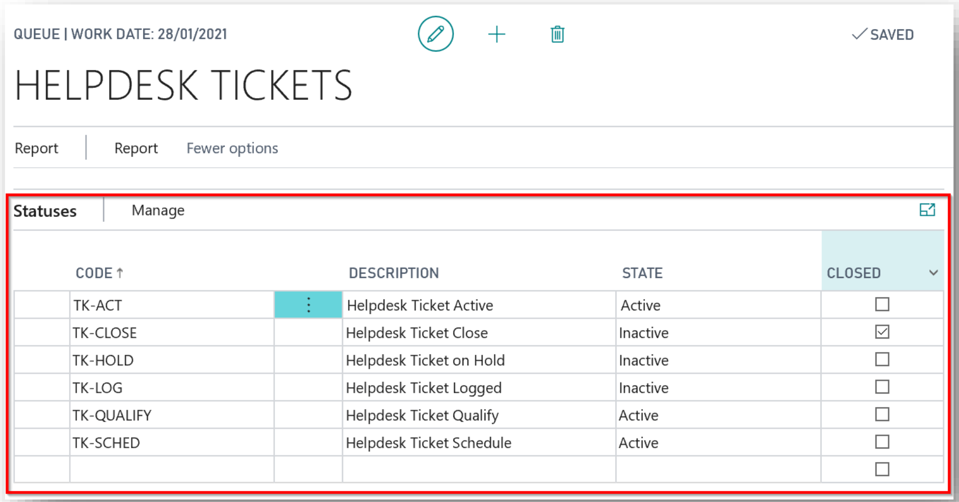


Figure 9-8

This is a list of the Statuses defined for the Queue. Case Statuses allow you to define user-definable Statuses for the Cases within this particular Queue. Each Case within the Queue can be assigned a Status Code on the Case Card Page.

The Case Status allows you to specify if the State of the Case Status is defined as Inactive or Active, or, if the Case Status on the Case is defined as Closed.

- **Code** – This is a unique Code that identifies this Status.

- **Description** – This is a user-defined description of the Status.

- **State** – Defines the State that this Status will have. Options are **Active**, **Inactive**. The Status Code of a Case can be defined and updated in the Case Card Page (Please see the section on Cases).

  Active - the State of this Status is Active. For those Cases with this Case Status, the State of its Case Status is defined as Active. The Status Code of a Case can be defined and updated in the Case Card Page (Please see the section on Cases).

  Inactive - the State of this Status is Inactive. For those Cases with this Case Status, the State of its Case Status is defined as Inactive. The Status Code of a Case can be defined and updated in the Case Card Page (Please see the section on Cases).

- **Closed** - For those Statuses that have the Closed checkbox enabled, the Case Status on the Case is defined as Closed. The Status Code of a Case can be defined and updated in the Case Card Page (Please see the section on Cases).

  When the Case Status on the Case is defined as Closed, you cannot create Case Actions for the Case.

Expand the **Categories** FastTab (*Figure 9-9*):

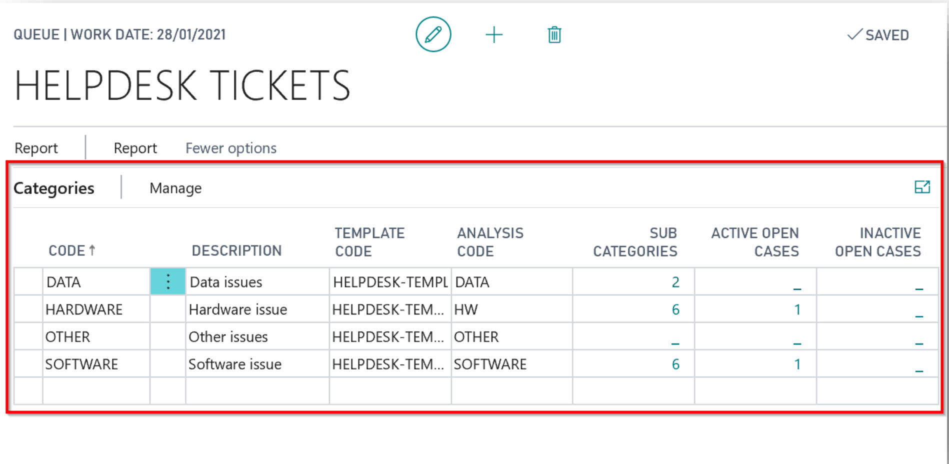


Figure 9-9

The Categories List Page displays a list of Categories available for the Queue and provides a means of classifying Cases within Queues by Categories. You assign the Categories defined within the Queue to Cases within the Queue.

- **Code** - A unique code to identify this Category. You can specify the Category for each individual Case in the Case Card. This provides a means to classify Cases by Categories. (Please see the section on Cases).

- **Description** - A user defined description of the Category.

- **Template Code** - The Template Code for the Category. Defining a Template Code allows you to specify certain Template Actions which are then applied to each Case in the Queue when the Case is set to this Category. (Please see the sections on Cases and Case Templates).

- **Analysis Code** - The Analysis Code for the Category. Defining an Analysis Code provides a means of further classifying Cases within Queues. (Please see the section on Analysis Codes).

- **Sub Categories** - A flowfield count of the number of Sub-Categories linked to the Category Code. Sub Categories provide a means of further classifying Cases within Queues. The Sub Category of a Case can be defined and updated in the Case Card Page (Please see the section on Cases).

- **Active Open Cases** - A flowfield count of the number of Active Open Cases that are set to the Category Code.

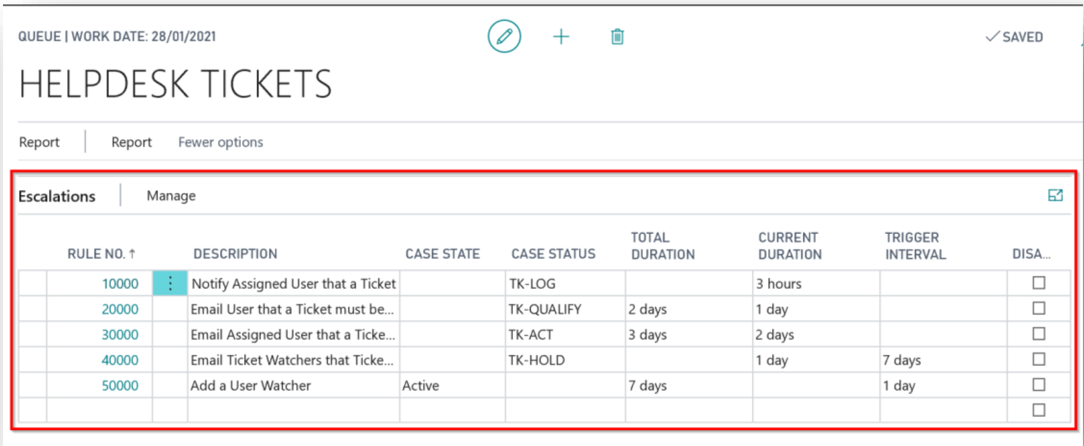
- **Inactive Open Cases** - A flowfield count of the number of Inactive Open Cases that are set to the Category Code.

To access an existing Category, from the Actions on the FastTab, select **Card**.

To create a new Category, from the Actions on the FastTab, select **New Line**.

Please see the section on the Category Card.

Expand the **Escalations** FastTab *(Figure 9-10)*:



RULE NO. ↑	DESCRIPTION	CASE STATE	CASE STATUS	TOTAL DURATION	CURRENT DURATION	TRIGGER INTERVAL	DISA...
10000	Notify Assigned User that a Ticket		TK-LOG		3 hours		☐
20000	Email User that a Ticket must be...		TK-QUALIFY	2 days	1 day		☐
30000	Email Assigned User that a Ticke...		TK-ACT	3 days	2 days		☐
40000	Email Ticket Watchers that Ticke...		TK-HOLD		1 day	7 days	☐
50000	Add a User Watcher	Active		7 days		1 day	☐
							☐

Figure 9-10

This is a list of Escalation Rules to apply to Cases within the Queue. When the specific conditions are met, the Escalation Rule Actions are fired.

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to Users Assigned to incomplete Case Actions, Managers, and Watchers of the Case. The Escalation Rules also enable you to add specified Watchers to Cases.

For information on how to run the Escalation Rules see the sections on **Executing Escalation Rules Manually** and **Executing Escalation Rules Automatically**.

- **Rule No.** - An automatically generated No. to identify this Escalation Rule.

- **Description** - A user defined description of the Escalation Rule.

- **Case State** - Specifies the State of the Status Code, on the Case, that must be met for this condition of the Escalation Rule to be considered true. Options are Active, Inactive. (The Escalation Rule condition also checks the criteria specified in the Case Status, Total Duration, Current Duration, Trigger Interval and Disabled fields). If you specify a Case State in the Escalation Rule, you cannot specify a Case Status.

  Active - The Case must have a Status Code that has its State set to Active.

  Inactive - The Case must have a Status Code that has its State set to Inactive.

- **Case Status** - Specifies the Case Status. The Case must be set to this Case Status for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the Case State, Total Duration, Current Duration, Trigger Interval and Disabled fields). If you specify a Case Status in the Escalation Rule, you cannot specify a Case State.

- **Total Duration** - Enter the Total Time (expressed as greater than, or equal to this Total Duration) that the Case must be in the specified State, or Status, for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the in the Case State, Case Status, Current Duration, Trigger Interval and Disabled fields).

  The Total Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of Status or State on a Case.

- **Current Duration** - Enter the Current Time (expressed as greater than, or equal to this Current Duration) for which the Case must be currently in the specified State or Status for, for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the Case Status, Case State, Total Duration, Trigger Interval and Disabled fields).

The Current Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of Status or State on a Case.

- **Trigger Interval** - Enter the time interval for which you want to wait before the Escalation Actions are repeated. This allows you to control how often you want the Escalation Actions to fire, for example, you may have a Job Queue set up to automatically Execute Escalation Rules every day, yet you only want the mails and the notifications to be sent every 3 days.

- **Disabled** - Select this checkbox to disable the Escalation Rule.

To edit an existing escalation, from the Actions on the FastTab, select **Card**.

To create a new escalation, from the Actions on the FastTab, select **New Line**.

Please see the section on Escalations.

Expand the **Interaction Groups** *(Figure 9-11)*:

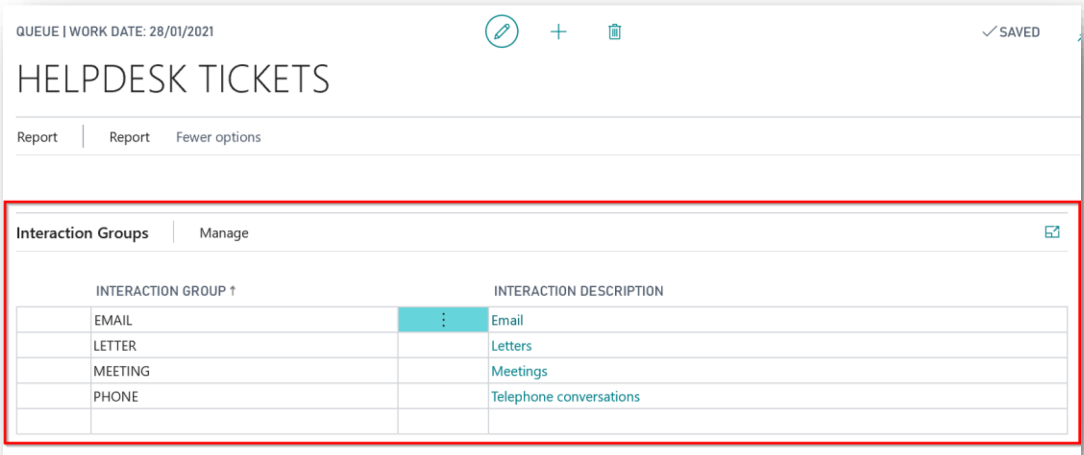


Figure 9-11

This is a list of Interaction Groups you can choose to use when Logging an Interaction against a Case Action for a Case within this Queue.

- **Interaction Group** - Specify the Interaction Group that you want to use when Logging an Interaction for a Case Action for a Case within this Queue.

- **Interaction Description** - Displays the Description for the chosen Interaction Group.

Expand the **Default Case Watchers** *(Figure 9-12)*:

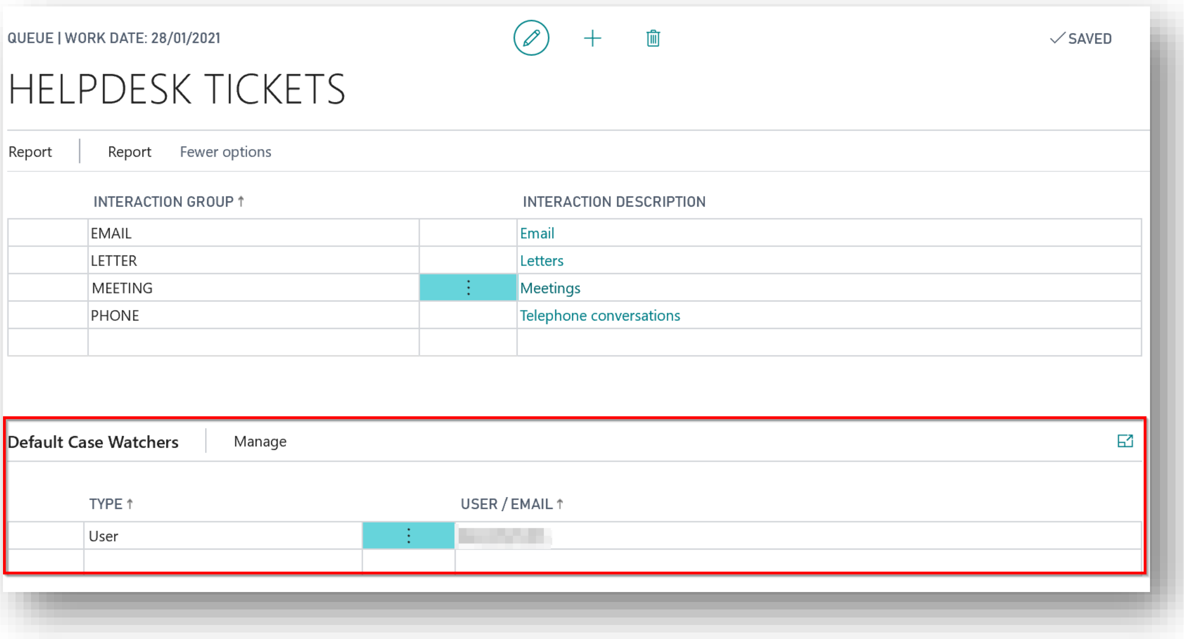


Figure 9-12

This is a list of the default Watchers to auto-assign to Cases created in this Queue. A Watcher can be a User Watcher or an Email Watcher. Escalation Rules can be defined on the Queue Card and, when run, will escalate Cases by notifying or emailing the Watchers of the Case, or by adding specified Watchers to the Case.

- **Type** - Choose the type of Watcher to add to the Case. Options are **User**, **Email**.
  User - the Watcher is defined as a User Watcher.

  Email - the Watcher is defined as a Watcher.

- **User/Email** - If the Watcher Type is User, then enter the User ID from a list of existing NAV Users. If the Watcher Type is Email, then enter an email address for the Watcher.

9.3 Categories

The Categories Card is accessed from the Categories FastTab in each individual Queue Card.

To access an existing Category, from the Actions on the FastTab, select **Card** (*Figure 9-13*).

To create a new Category, from the Actions on the FastTab, select **New Line**.

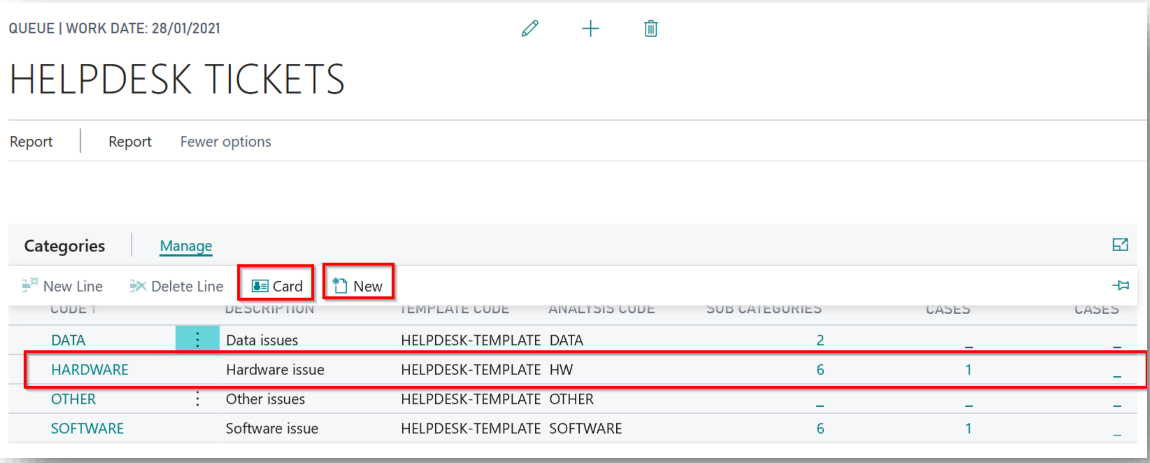


Figure 9-13

A Category provides a means to organise and classify Cases in SD Case Manager.

Expand the **General** FastTab (*Figure 9-14*):

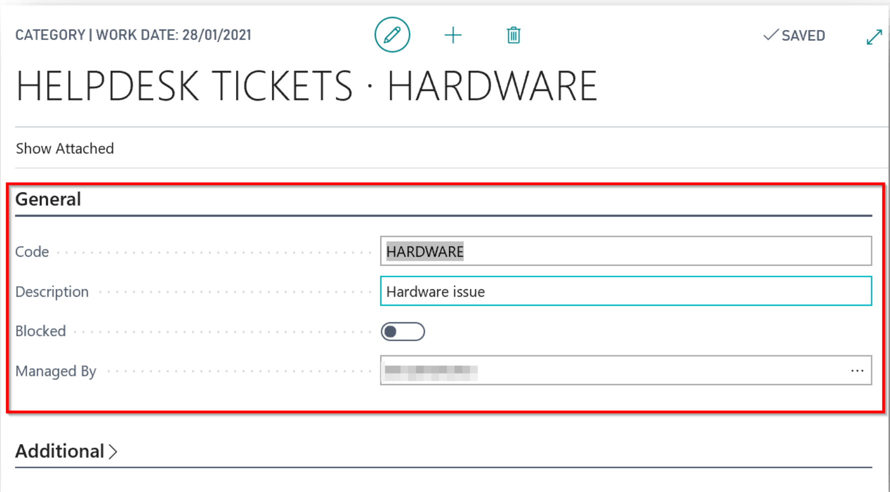


Figure 9-14

- **Code** - A unique code to identify this Category. You can specify the Category for the Case in the Case Card which provides a means to classify Cases within Queues by Categories. (Please see the section on Cases).

- **Description** - A user defined description of the Category.

- **Blocked** - A Category can be set to Blocked by selecting this checkbox. Setting a Category to blocked prevents this Category from being assigned to new or existing Cases.

- **Managed By** - Defaults the Managed By field on the Case to this User when the Category is selected in the Case Card and the Managed By on the Case Card is blank.

  Select the Default Managed By from a list of existing Users in Microsoft Dynamics 365 Business Central.

Expand the **Additional** FastTab (*Figure 9-15*):

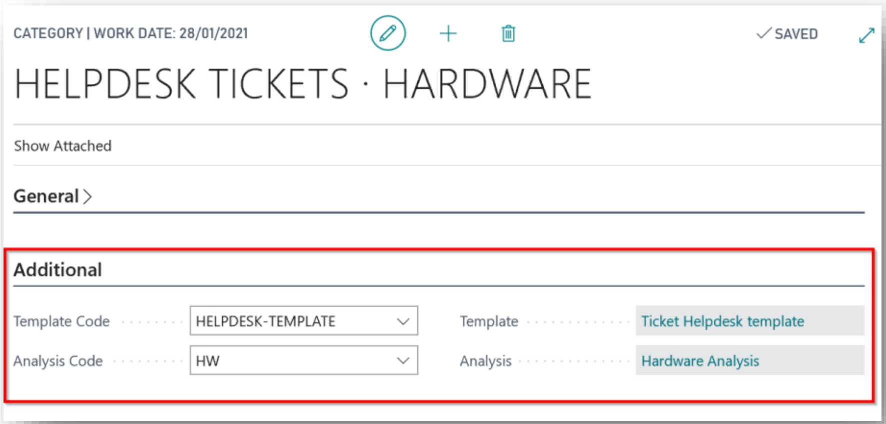


Figure 9-15

- **Template Code** - The Template Code for the Category. Defining a Template Code allows you to specify certain Template Actions which are applied to each Case in the Queue when the Case is set to this Category. (Please see the sections on Cases and Case Templates).

- **Template** - Displays the user defined description of the Template Code.

- **Analysis Code** - The Analysis Code for the Category. Defining an Analysis Code provides a means of further classifying Cases within Queues. (Please see the section on Analysis Codes).

- **Analysis** - Displays the user defined description of the Analysis Code.

Expand the **Sub Categories** FastTab (*Figure 9-16*):

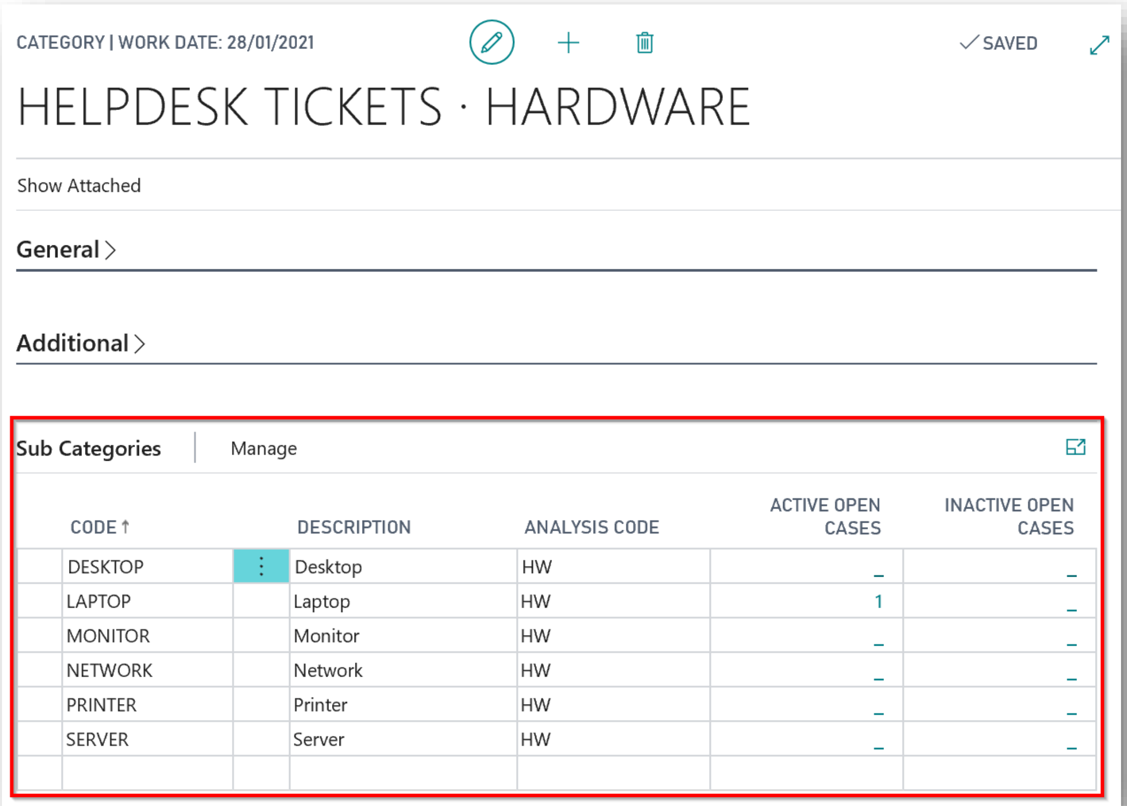


Figure 9-16

The Sub Categories List Page, displays a list of Sub Categories within the Category. The Sub Categories List Page provides a means of classifying Cases within Queues by Sub Categories. You assign the Sub Categories defined within the Category in the Queue to Cases within the Queue. (Please see section below on Cases).

- **Code** - Enter a unique code to identify this Sub Category and provide a means by which to further classify Cases by sub categories. You can set the Sub Category for the Case in the Case Card. (Please see the section on Cases).

- **Description** - Enter a user-defined description of the Sub Category.

- **Analysis Code** - The Analysis Code for the Sub Category. Defining an Analysis Code provides a means of further classifying Cases within Queues. (Please see the section on Analysis Codes).

- **Active Open Cases** - A flowfield count of the number of Active Open Cases that are set to the Sub Category Code.

- **Inactive Open Cases** - A flowfield count of the number of Inactive Open Cases that are set to the Sub Category Code.

Close the **Category Card Page** to return to the **Queue Card Page**.

9.4 Escalations

The Escalation Card is accessed from the **Escalations** FastTab in each individual **Queue Card**.

To access an existing Escalation Rule, from the Actions on the FastTab, select **Card** (*Figure 9-17*).

To create a new Escalation Rule, from the Actions on the FastTab, select **New Line.**

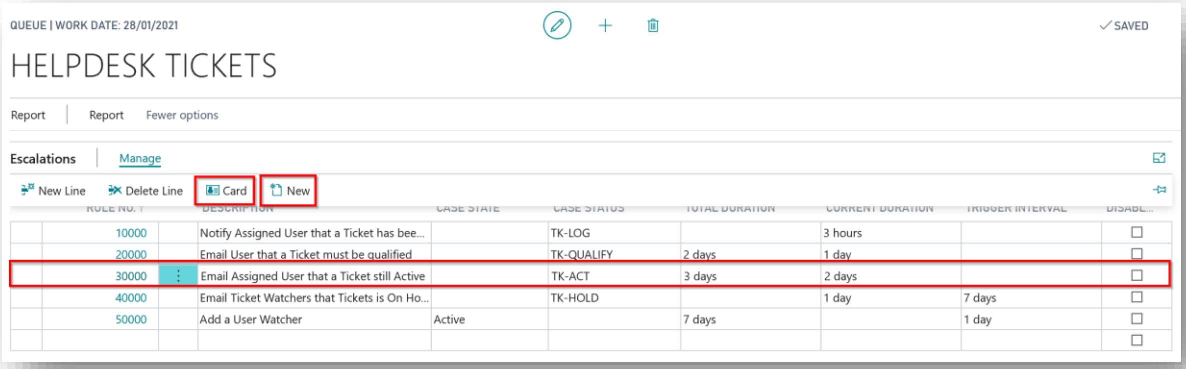


Figure 9-17

In the Escalation Card Page, expand the **General** FastTab Group (*Figure 9-18*):

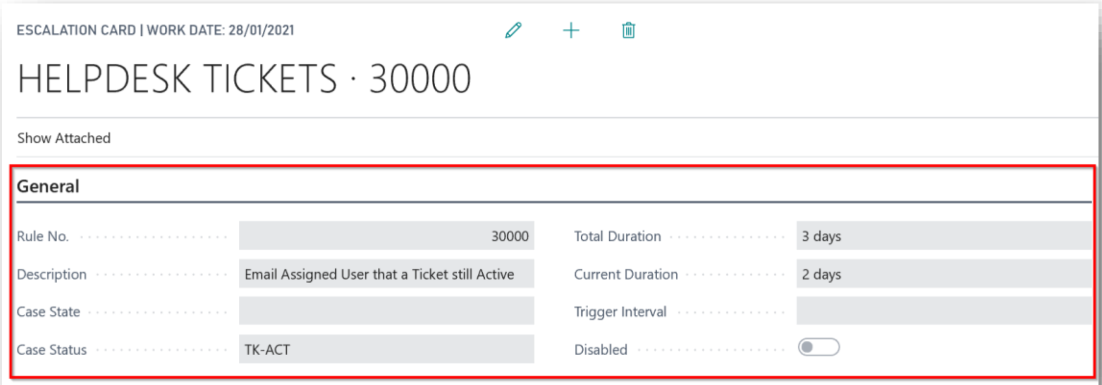


Figure 9-18

- **Rule No.** – This field is an automatically generated No. to identify this Escalation Rule.
- **Description** – Enter a user-defined description to describe the Escalation Rule.

- **Case State** – This field specifies the State of the Status Code on the Case that must be met for this condition of the Escalation Rule to be considered true. Options are **Active**, **Inactive**. (The Escalation Rule condition also checks the criteria specified in the Case Status, Total Duration, Current Duration, Trigger Interval and Disabled fields).

  Active - the Case must have a Status Code that has its State set to Active.

  Inactive - the Case must have a Status Code that has its State set to Inactive.

  If you specify a Case State in the Escalation Rule, you cannot specify a Case Status.

- **Case Status** - Specifies the Case Status. The Case must be set to this Case Status for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the Case State, Total Duration, Current Duration, Trigger Interval and Disabled fields).

  If you specify a Case Status in the Escalation Rule, you cannot specify a Case State.

- **Total Duration** - Enter the Total Time (expressed as greater than, or equal to this Total Duration) that the Case must be in the specified State, or Status, for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the in the Case State, Case Status, Current Duration, Trigger Interval and Disabled fields).
  The Total Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of Status or State on a Case.

- **Current Duration** - Enter the Current Time (expressed as greater than, or equal to this Current Duration) for which the Case must be currently in the specified State or Status for, for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the Case Status, Case State, Total Duration, Trigger Interval and Disabled fields).

  The Current Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of Status or State on a Case.

- **Trigger Interval** - Enter the time interval for which you want to wait before the Escalation Actions are repeated. This allows you to control how often you want the Escalation Actions to fire, for example, you may have a Job Queue set up to automatically Execute Escalation Rules every day, yet you only want the mails and the notifications to be sent every 3 days.

- **Disabled** - Select this checkbox to disable the Escalation Rule.

Expand the **Actions** FastTab (*Figure 9-19*):

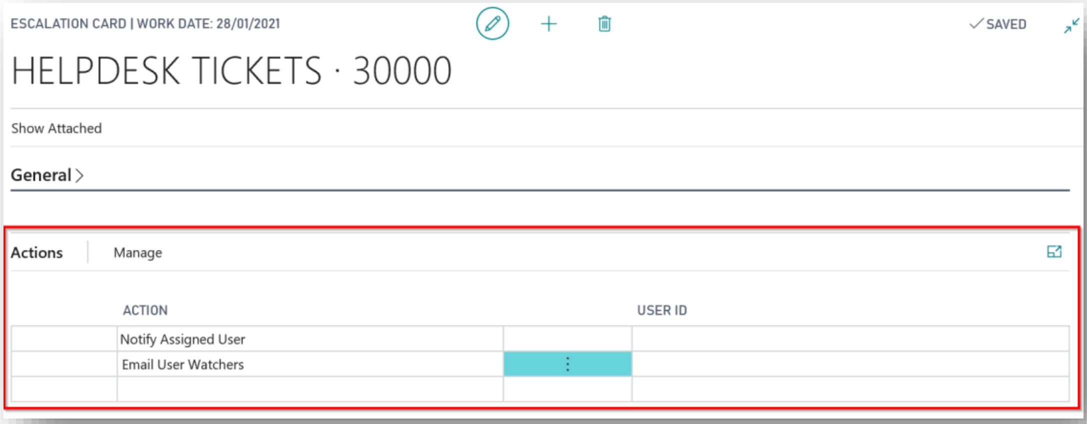


Figure 9-19

This is a list of the Actions that you want to happen for those Cases within the Queue where the Escalation Rule criteria are met, and the Escalation Rule fires.

- **Action** – This field allows you to specify the Action that you want to happen for those Cases within the Queue where the Escalation Rule criteria are met, and the Escalation Rule fires. Options are **Notify Assigned User**, **Notify User Watchers**, **Add a User Watcher**, **Email Assigned User**, **Email User Watchers**, **Email Watchers**.

  Notify Assigned User – When the criteria of the Escalation Rule are met and the Rule fires, a notification is sent to the Assigned User of the Open Actions on the Case. The Assigned User of the Case Action is specified in the Actions FastTab on the Case Card Page. A note is created for the Assigned User with an attachment/link to the Case. (Please see the section on Cases and Escalation Notifications.)

  Notify User Watchers – When the criteria of the Escalation Rule are met and the Rule fires, a notification is sent to the User Watchers of the Case. The User Watchers of the Case are specified in the Watchers FastTab on the Case Card Page. A note is created for the User Watcher with an attachment/link to the Case. (Please see the section on Cases and Escalation Notifications)

  Add a User Watcher When the criteria of the Escalation Rule are met and the Rule fires, add the User, specified in the User ID field, as a user Watcher to the Case. The User Watchers of the Case are specified in the Watchers FastTab on the Case Card Page. (Please see the section on Cases.)

Email Assigned User – When the criteria of the Escalation Rule are met and the Rule fires, send an Email to the Assigned User of the Open Actions on the Case. The Email address field for the Assigned User is taken from the User Card table for the particular user. The Assigned User of the Case Action is specified in the Actions FastTab on the Case Card Page. (Please see the section on Cases).

Email User Watchers – When the criteria of the Escalation Rule are met and the Rule fires, send an Email to the User Watchers of the Case. The Email address field for the User Watcher is taken from the User Card table for the particular user. The User Watchers of the Case are specified in the Watchers FastTab on the Case Card Page. (Please see the section on Cases).

Email Watchers – When the criteria of the Escalation Rule are met and the Rule fires, send an Email to the Watchers of the Case. The Email address field for the Watcher is taken from the Email address specified for Watchers of Type Email as specified in the Watchers FastTab on the Case Card Page. (Please see the section on Cases).

- **User ID** – This field is relevant only where the Action is set to Add a User Watcher. This field allows you to select the Dynamics 365 Business Central User ID, from the Users table, for the User that you want to Add as a User Watcher.

Close the **Escalation Card Page** to return to the **Queue Card Page**.

For information on how to run the Escalation Rules see the section on **Executing Escalation Rules Manually** and **Executing Escalation Rules Automatically.**

9.5 Priorities

The Priorities List Page is accessed from the **SD Case Manager Setup Page** by selecting the **Home** tab, **Related** group, **Priorities**. The Priorities List Page is a list of all the Priorities currently setup in SD Case Manager (*Figure 9-20*).

A Priority provides a means to organise or prioritise Cases in SD Case Manager.

Using Priorities, you can assign a Priority to a Case and select the Style formatting you wish to apply to records in the Case Lists, My Open Cases List, and the Action Lists, for Cases that are associated with the Priority.

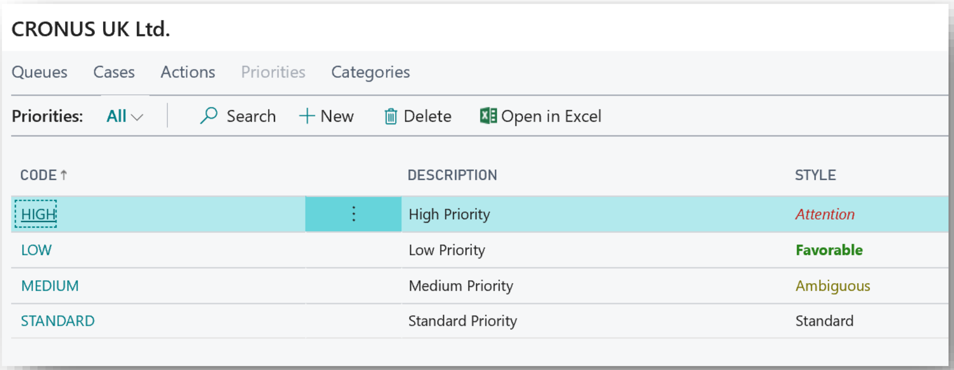


Figure 9-20

- **Code** - A unique code to identify this Priority. You can specify the Priority for the Case in the Case Card. (Please refer to the section on Cases in this document).

- **Description** - A user defined description of the Priority.

- **Style** - Select the Style formatting that you wish to apply to the Case records in the Case Lists, My Open Cases, and the Action Lists for Cases that are associated with this Priority.

To access an existing Priority from the Priorities List Page, from the menu, in the **Manage** group, select **View** or **Edit**.

To create a new Priority, from menu, select **New**.

The Priority Card Page contains the following fields:

Expand the General FastTab Group (*Figure 9-21*):

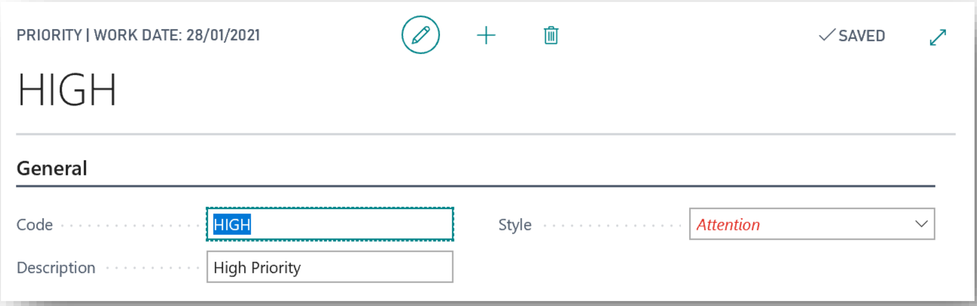


Figure 9-21

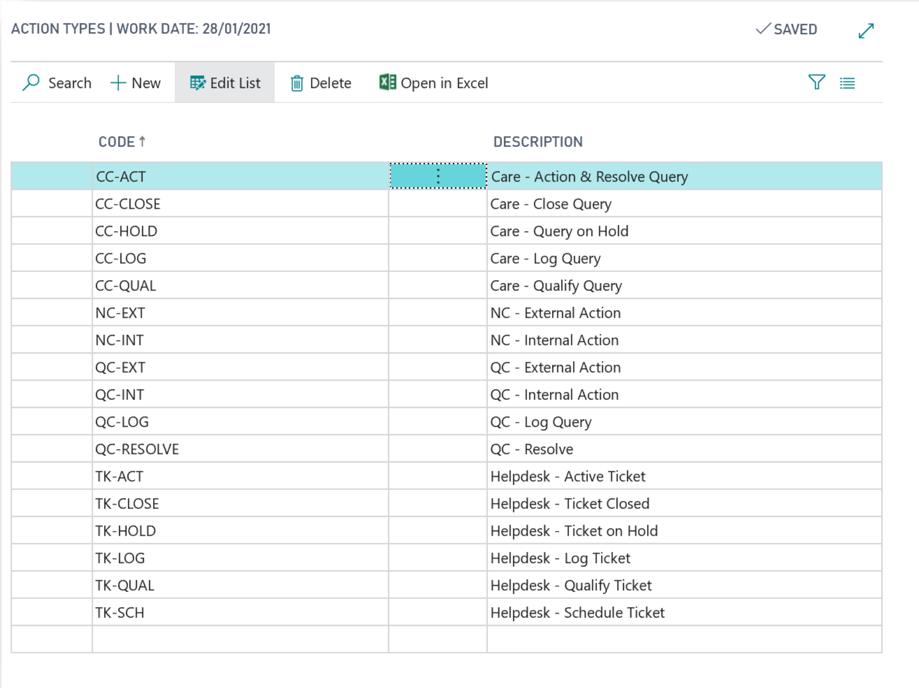
- **Code** – Enter a unique code to identify this Priority. You can specify the Priority for the Case in the Case Card. (Please refer to the section on Cases in this document).

- **Description** – Enter a user-defined description to describe the Priority.

- **Style** – Select the style formatting that you wish to apply to those Case records associated with this Priority as they appear in the various Case List Pages and the My Case Page.

9.6 Action Types

The Action Types List Page is accessed from the **SD Case Manager Setup Page** by selecting the **Home** tab, **Related** group, **Action Types**. The Action Types List Page is a list of all the Action Types currently setup in SD Case Manager (*Figure 9-22*).



CODE ↑	DESCRIPTION
CC-ACT	Care - Action & Resolve Query
CC-CLOSE	Care - Close Query
CC-HOLD	Care - Query on Hold
CC-LOG	Care - Log Query
CC-QUAL	Care - Qualify Query
NC-EXT	NC - External Action
NC-INT	NC - Internal Action
QC-EXT	QC - External Action
QC-INT	QC - Internal Action
QC-LOG	QC - Log Query
QC-RESOLVE	QC - Resolve
TK-ACT	Helpdesk - Active Ticket
TK-CLOSE	Helpdesk - Ticket Closed
TK-HOLD	Helpdesk - Ticket on Hold
TK-LOG	Helpdesk - Log Ticket
TK-QUAL	Helpdesk - Qualify Ticket
TK-SCH	Helpdesk - Schedule Ticket

Figure 9-22

This is a list of Action Types defined for the Queue. Case Action Types allow you to define user-definable Action Types for the Cases across all Queues.

When creating an Action for a Case, you specify the Action Type for which you are logging the Action. You can set the Default Case Action Type for a Case on the Queue Card.

By defining an Interaction Group on the Queue Card, you can create Interaction Log Entries when a Case Action is created for a Case in the particular Queue.

- **Code** – A unique Code to identify this Action Type.
- **Description** – A user-defined description of the Action Type.

9.7 Communication Methods

The Communication Methods List Page is accessed from the **SD Case Manager Setup Page** by selecting the **Home** tab, **Related** group, **Communication Methods**. The Communication Methods List Page is a list of all the Communication Methods currently setup in SD Case Manager (*Figure 9-23*).

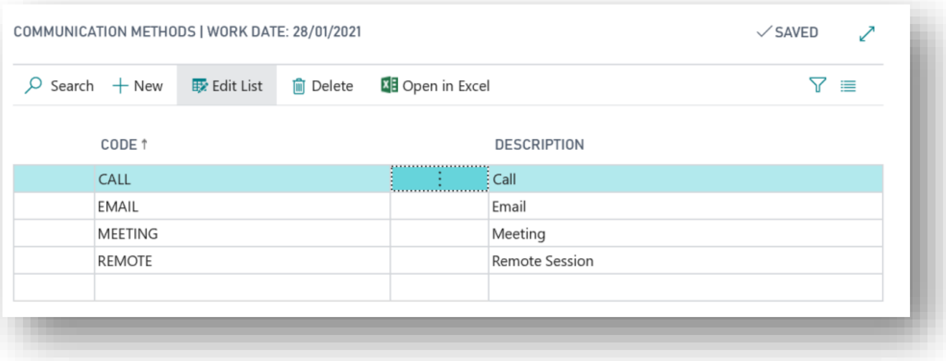


Figure 9-23

This is a list of Communication Methods defined in SD Case Manager.

When creating a Case, you can specify the Case Reported Method, in the Reporter FastTab on the Case Card, using the defined Communication Methods. You can also set the Preferred Communication Method for the Watchers, in the Watchers FastTab on the Case Card, using defined Communication Methods.

- **Code** – A unique Code to identify the Communication Method.
- **Description** – A user-defined description of the Communication Method.

9.8 Case Templates

The Case Templates List Page is accessed from the **SD Case Manager Setup Page** by selecting the **Home** tab, **General** group, **Case Templates**. The Case Templates List Page is a list of the Templates defined in SD Case Manager (*Figure 9-24*).

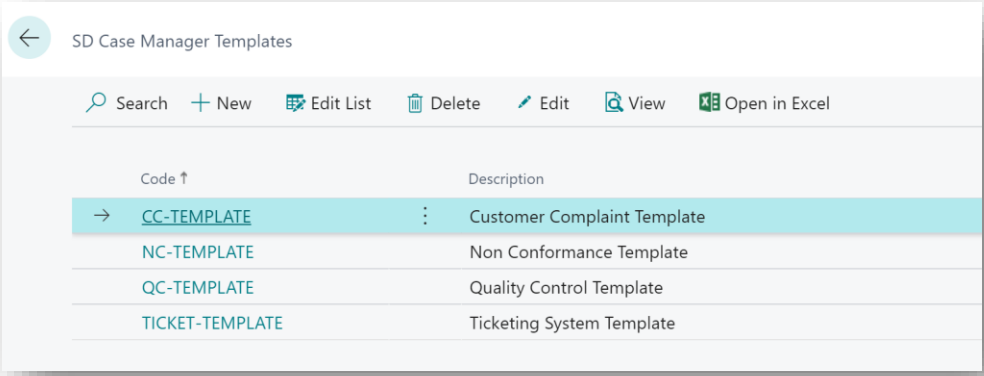


Figure 9-24

Defining a Template Code at Queue level allows you to define Case Actions that are automatically created for Cases in the Queue. You can automatically create these Case Actions on creation of a Case by linking the Template Code to the Queue.

You can also define a Template Code for each Category within a Queue, thereby allowing you to define Case Actions that are automatically created when you select, or update, the Category Code on the Case Card for the Case in the Queue.

The Templates list page contains the following fields:

- **Code** - A unique user defined Code to identify the Template. Defining a Template Code allows you to link the Template to the Queue and to Categories within the Queue.
- **Description** - A user defined description of the Template.
- **Disabled** - Select this checkbox to disable the Template.

To access an existing Template from the Template List Page, from the menu select **View** or **Edit**.

To create a new Template, from the menu select **New**.

Expand the **General** FastTab (*Figure 9-25)*:

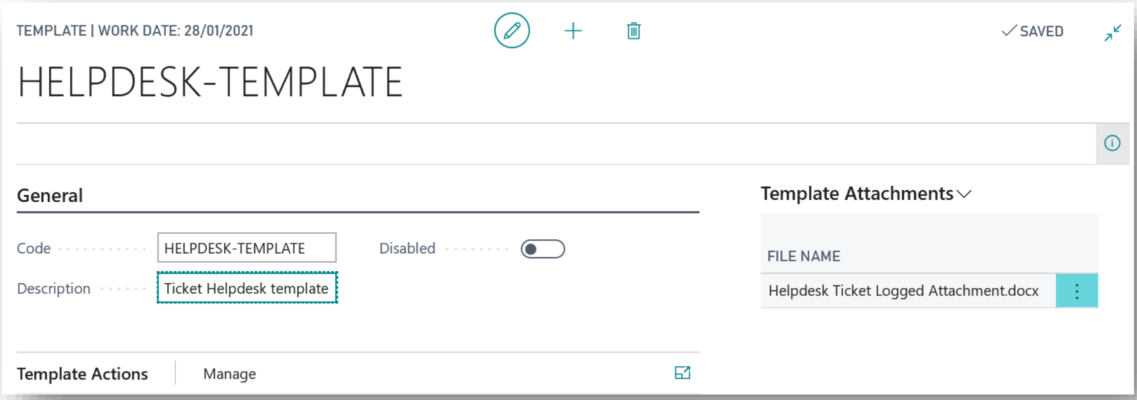


Figure 9-25

- **Code** - A unique user defined Code to identify the Template. Defining a Template Code allows you to link a Template to the Queue and to the Categories within the Queue.

- **Description** - A user defined description of the Template.

- **Disabled** - Select this checkbox to disable the Template.

Expand the **Template Actions** FastTab (*Figure 9-26)*:

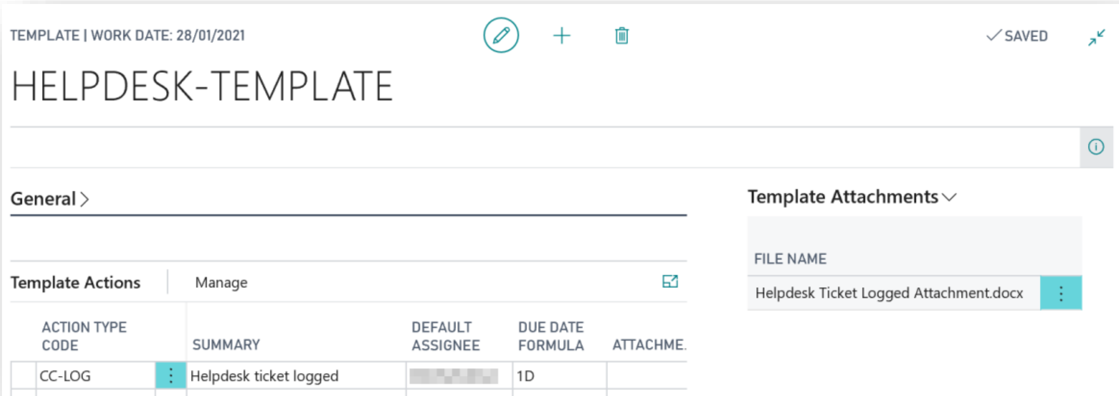


Figure 9-26

This is a list of the Actions defined for the Template. These Actions will be auto inserted on a Case that has the Template Code defined at Queue or Category level.

- **Action Type** - Select the Action Type Code for the Template Actions.
- **Summary** – Enter a description for the Template Action.
- **Default Assignee** – Enter the NAV User that you want to assign the Template Action to on the Case Card.
- **Due Date Formula** - Enter the Due Date Formula for SD Case Manager to use to determine the Due Date for the Template Action created on the Case Card.
- **Attachments** - A flowfield count of the Files attached to the Template Action.

To Attach Files to a Template Action, select the **Attach File** Action from the Actions in the Template Actions FastTab Group. When a Template Action is created on the Case, the file, if it exists, will be attached to the Case Action (*Figure 9-27*).

To access the Template Actions Card Page, select **Card** from the Actions in the Template Actions FastTab Group (*Figure 9-27*).

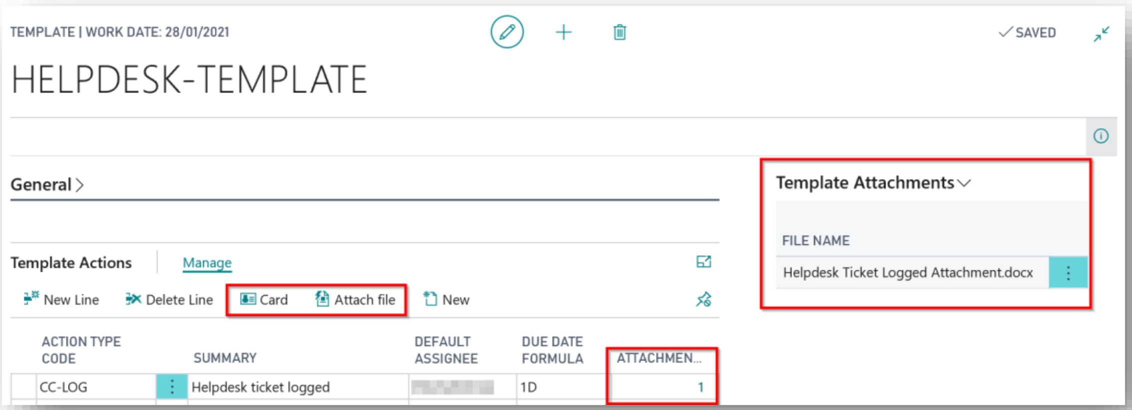


Figure 9-27

In the Template Action Card, expand the **General** FastTab (*Figure 9-28*):

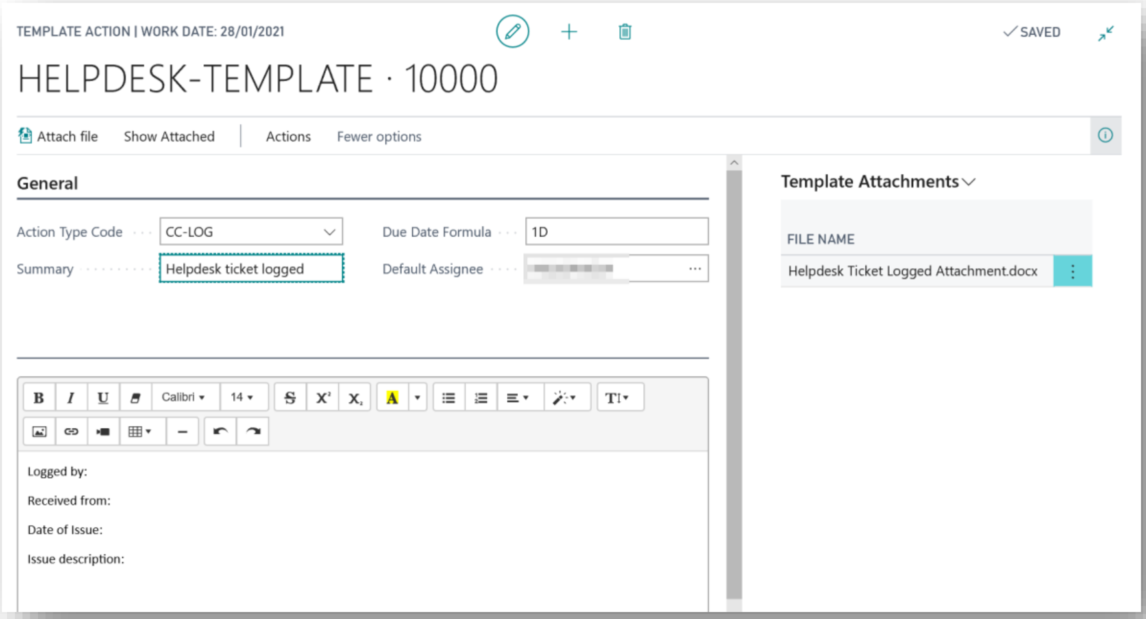


Figure 9-28

- **Action Type** - Select the Action Type Code.

- **Summary** - Displays the description for the selected Action Type.

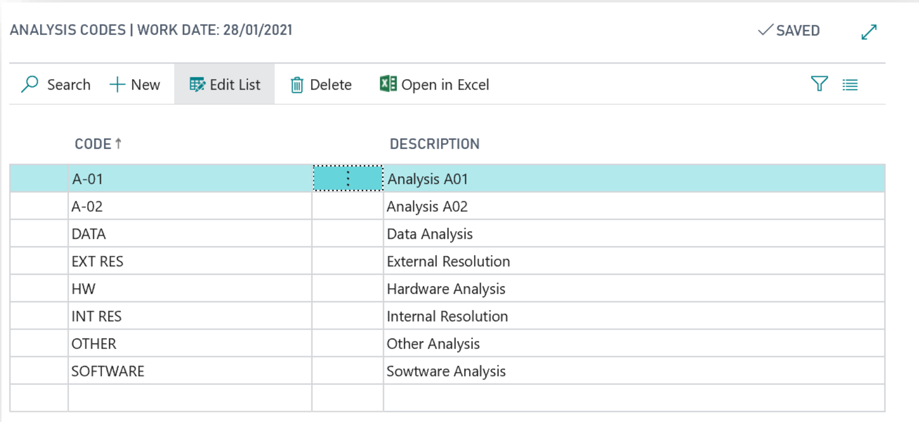
- **Due Date Formula** - Enter the Due Date Formula for which you want SD Case Manager to use to determine the Due Date for the created Case Action. The Due Date Formula is applied to the Work Date to determine the Due Date for the Case Action created by the Template.

- **Comment** - Enter the text that you want auto-created as a comment on the Case Action.

9.9 Analysis Codes

The Analysis Codes List Page is accessed from the **SD Case Manager Setup Page** by selecting the **Home** tab, **Related** group, **Analysis Codes**.

Analysis Codes provide a means of classifying and analysing Cases across all Queues (*Figure 9-29*).



CODE ↑	DESCRIPTION
A-01	Analysis A01
A-02	Analysis A02
DATA	Data Analysis
EXT RES	External Resolution
HW	Hardware Analysis
INT RES	Internal Resolution
OTHER	Other Analysis
SOFTWARE	Sowtware Analysis

Figure 9-29

- **Code** - The Analysis Code for the Analysis Code.
- **Description** - Displays the user-defined description of the Analysis Code.

9.10 Cases

The **Cases** can be accessed a number of ways in the **SD Case Manager Role Centre**: from the **My Cases** List Page; by drilling through on the Cues in the **Case Manager Activities** or by searching the **Tell Me**.

The Case List Page is a filtered list of Cases logged in SD Case Manager (*Figure 9-30*).

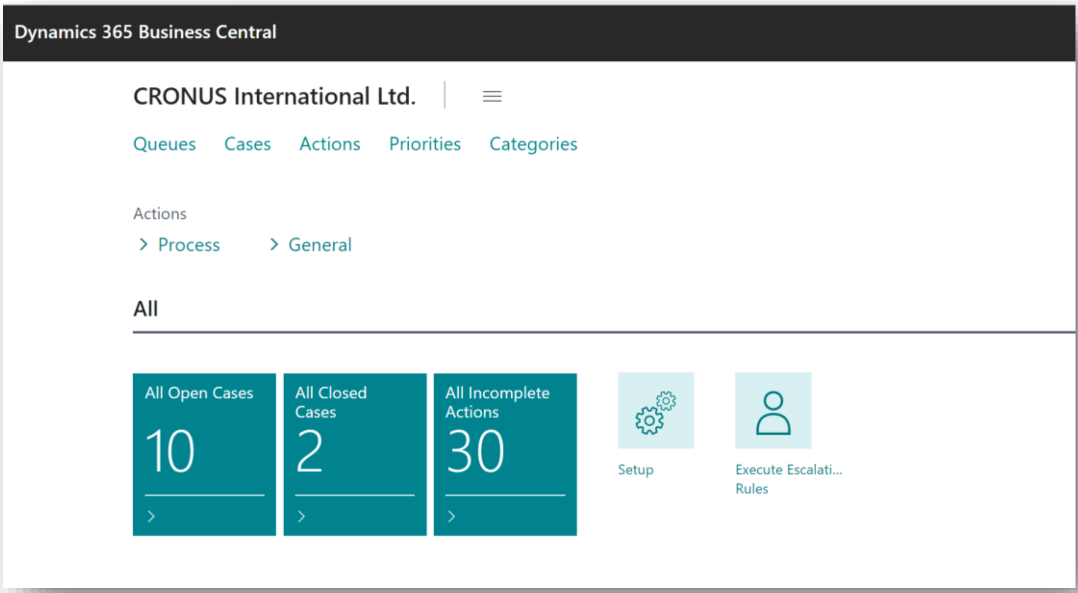


Figure 9-30

To access an existing Case from the Case List Page, from the **Home** tab, in the **Manage** group, select **View** or **Edit**.

To create a new Case, from the menu select **New**.

In the Case Card users can create, update, and progress the Case through the user-definable workflows as defined by the Case Statuses. Users can also log and view Actions against the Case and define Watchers and User Watchers on the Case.

Expand the **General** FastTab Group (*Figure 9-31*):

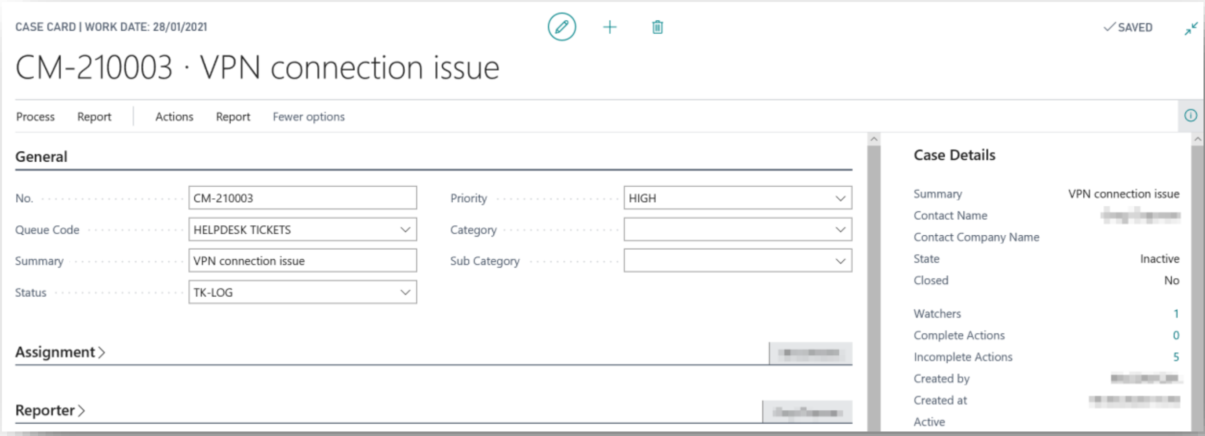


Figure 9-31

- **No.** – This field is a unique Code that identifies the Case. This field uses the No. Series field specified on the SD Case Manager Setup Page.

- **Queue Code** – This field specifies the Queue that the Case is in currently. Select a Queue from a list of existing Queues in SD Case Manager. (Please see the section on Queues).

- **Summary** – This field is a user-defined description of the Case.

- **Status** – This field is the Status of the Case. Select from a list of existing Statuses defined for the current Queue Code. (Please see the section on Queues). Case Statuses allow you to specify if the State of the Case Status is defined as Inactive or Active, or, if the Case Status on the Case is defined as Closed.

- **Priority** – This field defines the Priority for the Case. Select from a list of existing Priorities in SD Case Manager (Please see the section on Priorities). A Priority provides a means to organise or prioritise Cases in SD Case Manager. Using Priorities, you can select the Style formatting that you wish to apply to those Case records associated with this Priority as they appear in the various Case List Pages and the My Case Page in SD Case Manager.

- **Category** – This field specifies the Category for the Case. Select from a list of existing Categories in SD Case Manager (Please see the section on Categories). A Category provides a means of classifying Cases.

- **Sub Category** – This field specifies the Sub Category for the Case. Select from a list of existing Sub-Categories in SD Case Manager (Please see the section on Categories). A Sub Category provides a means of further classifying Cases.

Expand the **Assignment** FastTab Group (*Figure 9-32*):

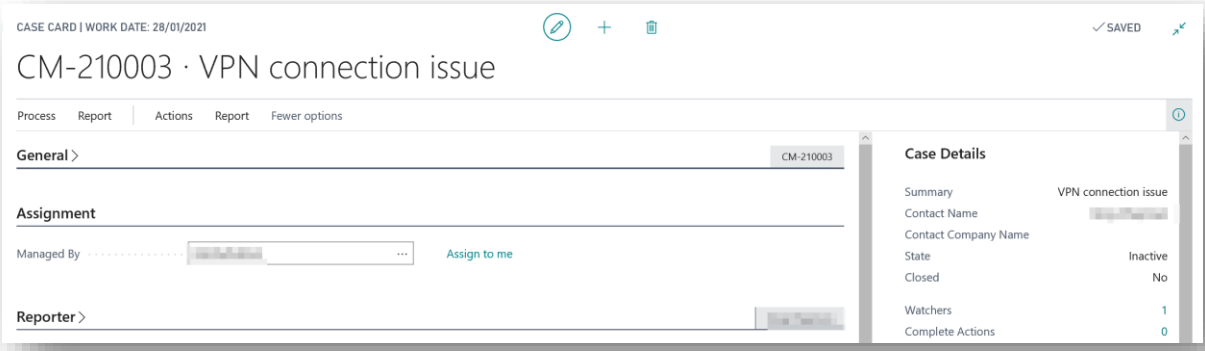


Figure 9-32

- **Managed By** - this is the User ID of the NAV User Managing the Case. Select from a list of existing NAV Users.

Expand the **Reporter** FastTab Group (*Figure 9-33*):

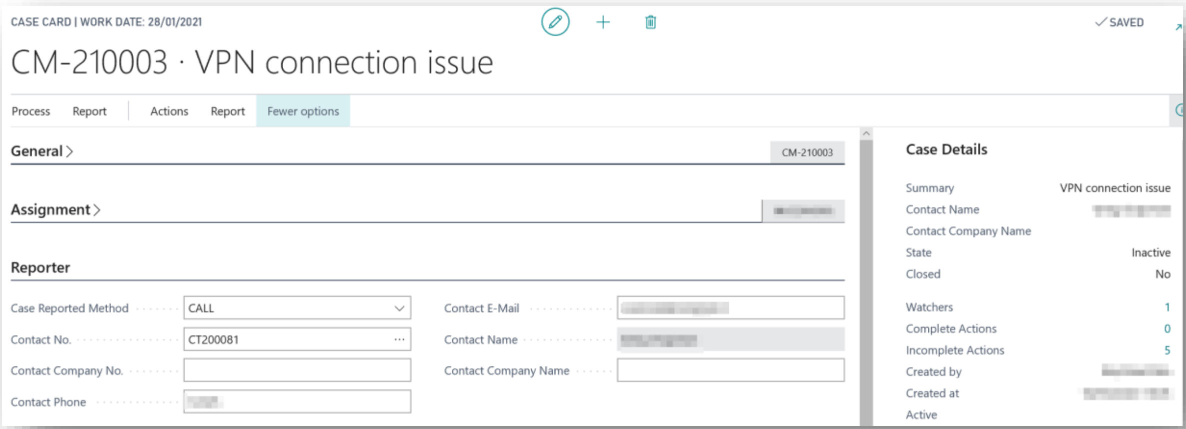


Figure 9-33

- **Case Reported Method** – This field specifies the Case Reported Method for this Case. Select from a list of existing Communication Methods.

- **Contact No.** - This field specifies the Contact No. for this Case. Select from a list of Contacts from the standard NAV Contact List Page.

- **Contact Name** - This field displays the Name of the selected Contact No.

- **Contact Company No.** - This field displays the Company No. of the current Contact's Company.

- **Contact Company Name** - This field displays the Contact Company Name for the current Contact

- **Contact E-Mail** - The E-Mail of the selected Contact.

Expand the **Watchers** FastTab Group (*Figure 9-34*):

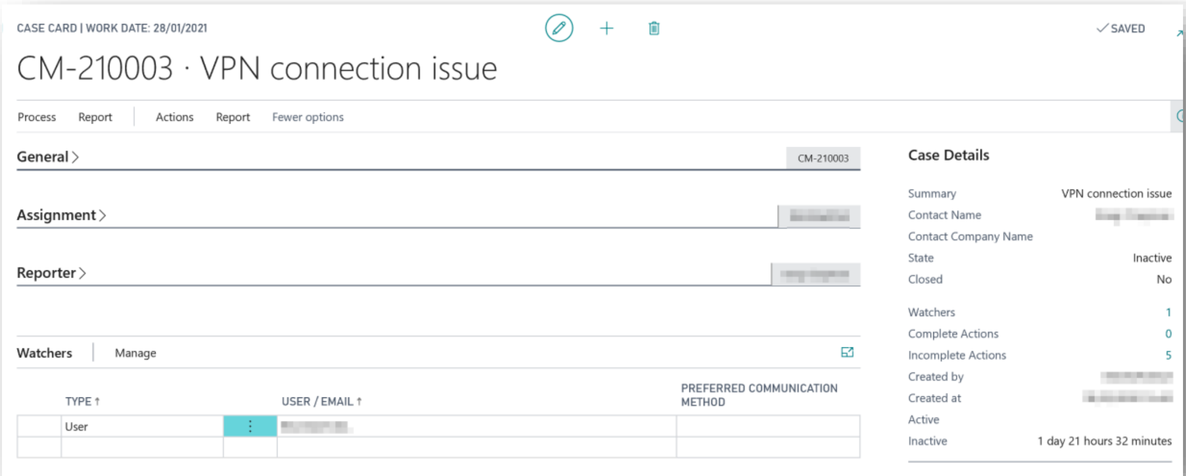


Figure 9-34

This is a list of Watchers assigned to the Case. A Watcher can be a User Watcher or an Email Watcher. Escalation Rules can be defined on the Queue Card and, when run, will escalate Cases by notifying or emailing the Watchers of the Case, or, by adding specified Watchers to the Case (Please see the section on Queues).

The Watchers List contains the following fields:

- **Type** - Choose the type of Watcher to add to the Case. Options are **User**, **Email**.

  User - the Watcher is defined as a User Watcher.

Email - the Watcher is defined as a Watcher.

- **User/Email** - If the Watcher Type is User, then enter the User ID from a list of existing NAV Users. If the Watcher Type is Email, then enter an email address for the Watcher.

- **Preferred Communication Method** – Enter the Watchers Preferred Communication Method. Choose from a list of Communication Methods.

Expand the **Actions** FastTab Group (*Figure 9-35*):

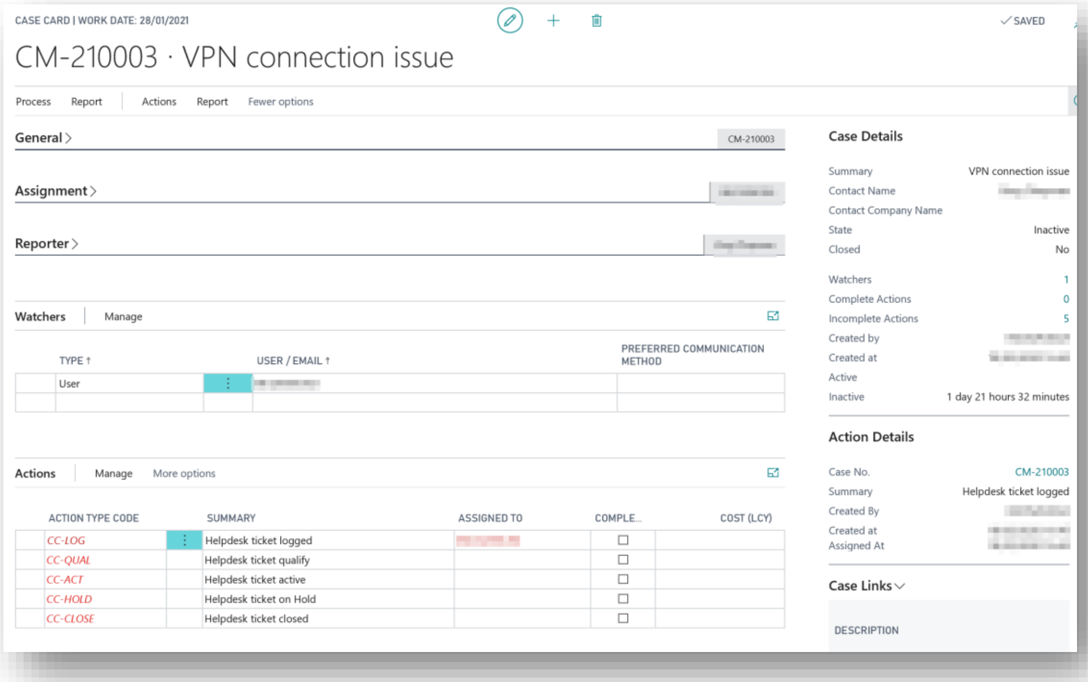


Figure 9-35

This is a list of all the Actions created and logged against the Case.

- **Action Type** – Specifies the Action Type for the Action.

- **Summary** - A user defined description of the Action.

- **Assigned To** - The User that the Action is assigned to.

- **Completed** - Indicates if the Action is marked as completed.

- **Cost LCY** - the Cost LCY that was specified on the Action.

To log a Case Action, from the **Home** tab of the Case Card, in the **Process** group, select **New Action** (*Figure 9-36)*.

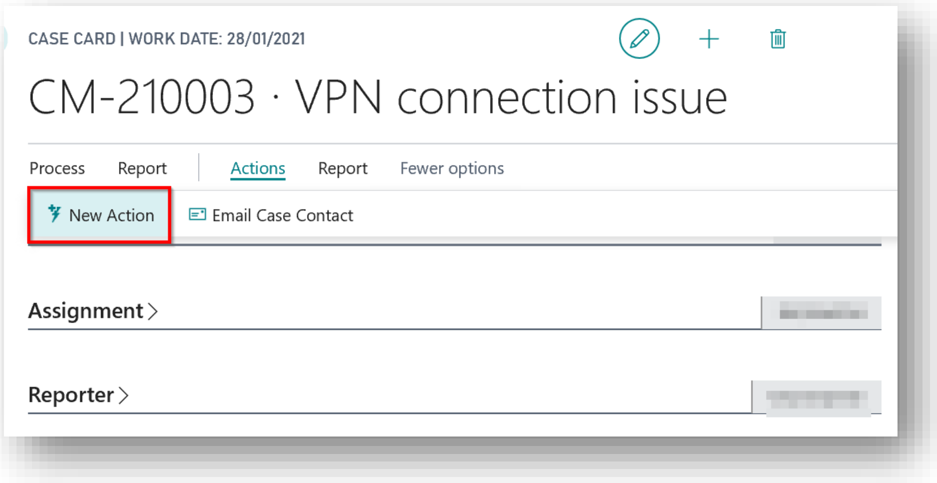


Figure 9-36

Existing Case Actions can be Edited by choosing the **Edit** Action from the Actions in the Action List Page (*Figure 9-37*).

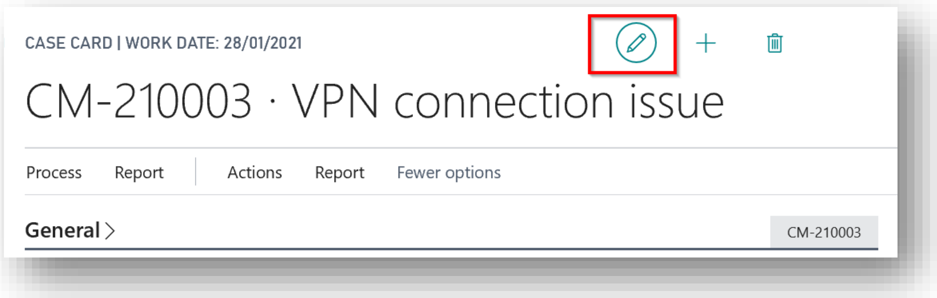


Figure 9-37

9.11 Case Actions

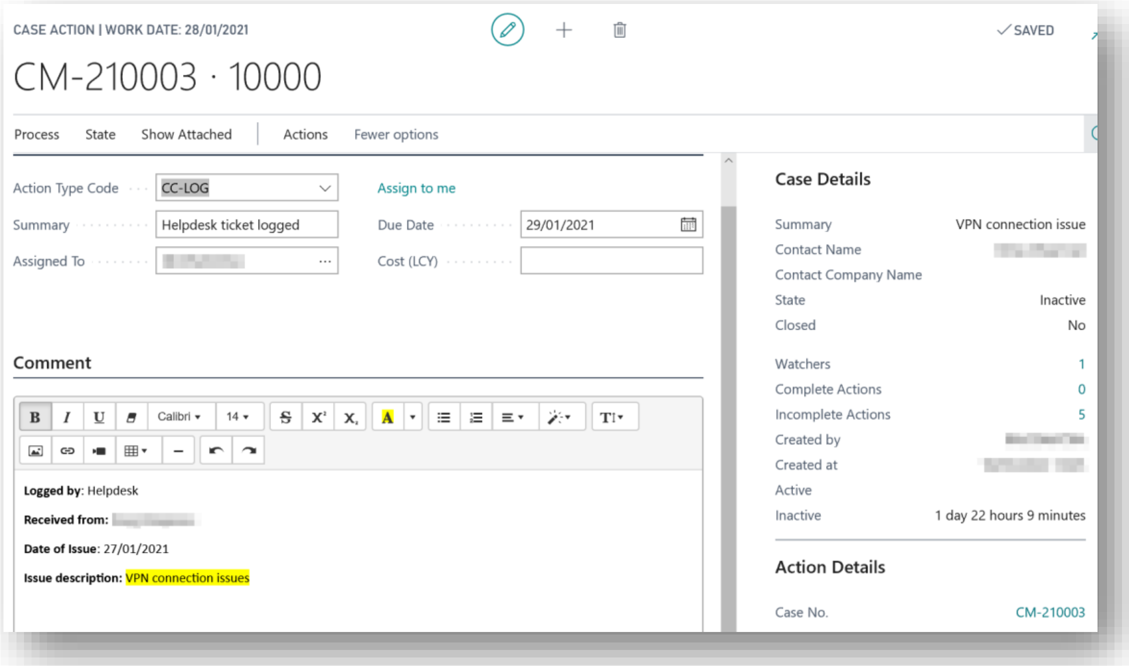


Figure 9-38

- **Action Type Code** – This field specifies the Action Log Type for this Action. Select from a list of existing Action Types defined for the Queue that this Case is in.
- **Summary** – This field is a user defined summary of the Case Action.
- **Assigned To** - Specifies the User ID of the NAV User who is Assigned to the Case. Select from a list of existing NAV Users.
- **Due Date** - The Date that the Action is due by. If the Action was created from a Template, the Due Date is calculated by using the Due Date Formula specified in the Template Actions.
- **Cost LCY** – This field enables the user to enter a Cost LCY for the Case Action.
- **Comment** – This is a user defined free text comment for the Case Action.

When you create or Edit a Case Action, you can choose the Actions below (*Figure 9-39*):

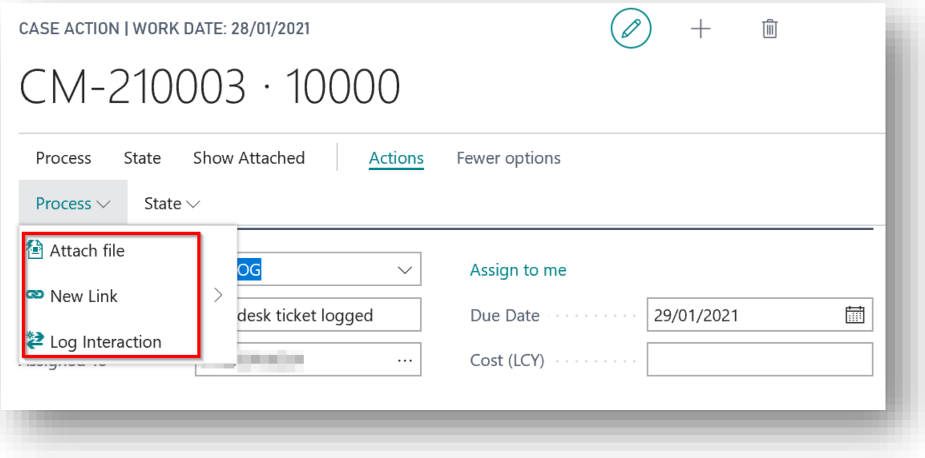


Figure 9-39

- Attach a file to the Action by selecting the **Actions** tab, **Process** group, **Attach File** and browsing to the relevant file(s).

- Log an Interaction for the Action by the **Actions** tab, **Process** group, **Log Interaction**. To Log an Interaction for the Action you must have an Interaction Group specified in the Interaction Groups FastTab of the Queue Card Page (Please see the section on Queues).

- Link the Action to a specific record in NAV by selecting the **Actions** tab, **Process** group, **New Link**.

  A drop-down list allows you to quickly link to either Customer, Item, Vendor, or to a number of other pre-defined NAV Transactions (*Figure 9-40*). You can also choose to create a custom link to a record by choosing Custom (*Figure 9-40*) and selecting the NAV table that you want to link to the Action.

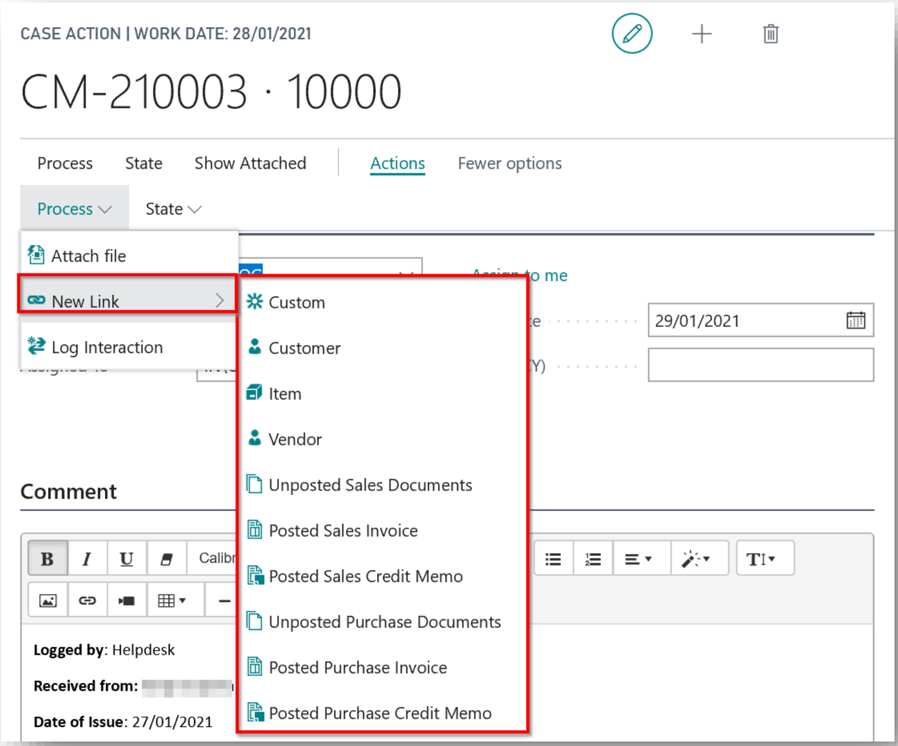


Figure 9-40

To Email the Case Contact, from the **Home** tab, in the **Process** group, select **Email Case Contact** (*Figure 9-41)*. The Contact on the Case is sent an Email with a standard subject header and body and the Queue Report filtered to the Case, attached to the message.

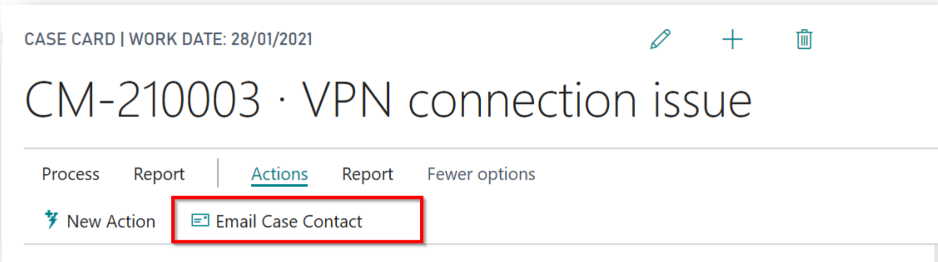


Figure 9-41

To Print the details of **the Case Report**, from the **Home** tab, in the **Report** group, select **Case** Report (*Figure 9-42*).

A Report Action Page, on which you can filter down on the records in the Case Table and in the Case Action Table upon which the report will run, is displayed. The Case Report will show, for the filtered records, fields from the Case Card and a list of Actions logged against the Case. **Note: the Case Report will not print pictures/images embedded in the Case Action Comment field.**

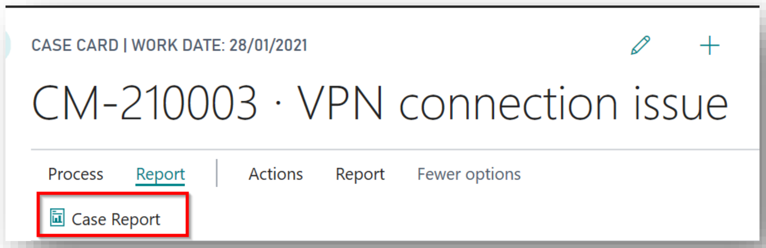


Figure 9-42

To mark the Case Action as **Completed**, to **Re-open** a completed Case Action or to **Cancel** a Case Action, select the Actions below from the **State** group (*Figure 9-43*).

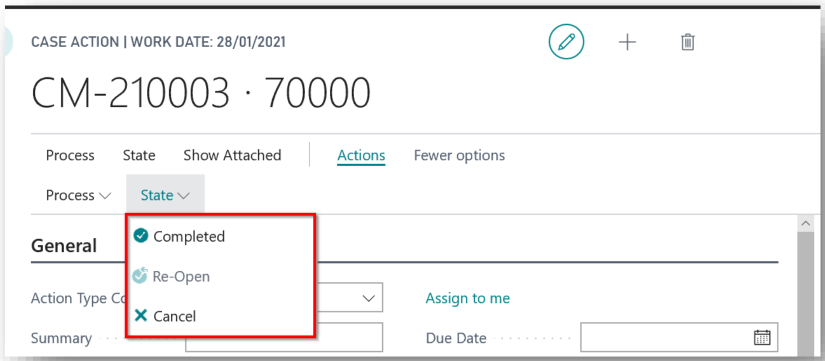


Figure 9-43

9.12 Escalation Notifications

As mentioned above in the sections on Escalations, SD Case Manager allows you to define escalation rules with various actions including an action to Notify Assigned User and an action to Notify User Watchers. These actions when triggered result in a notification being sent to the Assigned User of the Open Actions on the Case and/or to the User Watchers of the Case. A note is created for the relevant user with an attachment/link to the Case.

SD Case Manager has an entry in the **My Notifications** list automatically entered and enabled on install (*Figure 9-44*).

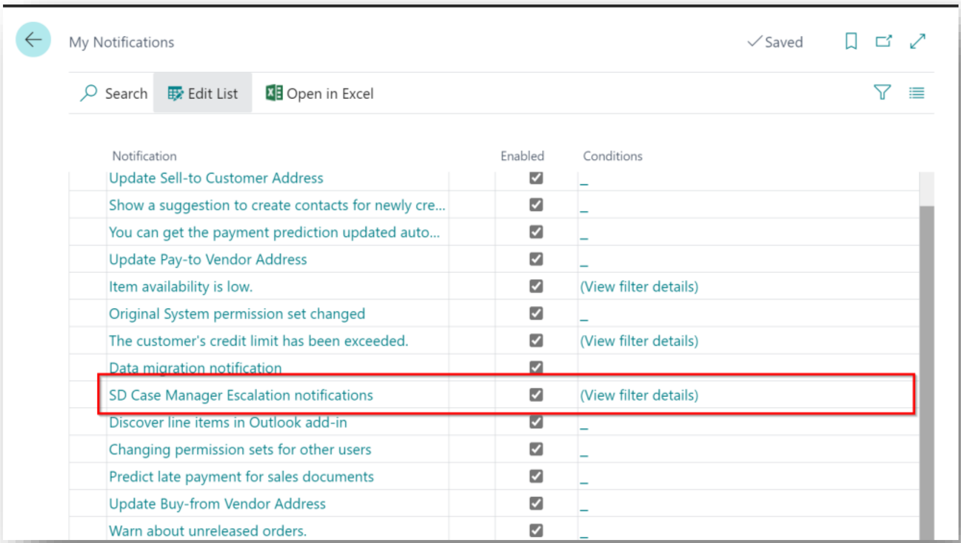


Figure 9-44

When the criteria of the Escalation Rule are met and the rule fires, these notifications and notes can be viewed by searching the Tell Me for **SD Case Manger Notifications** (*Figure 9-45*).

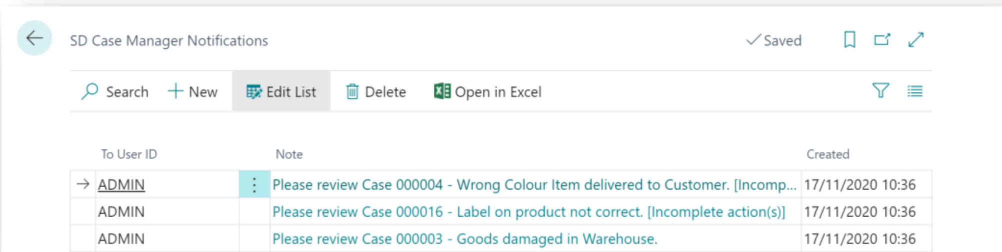


Figure 9-45

Selecting the Note URL link will open the Case Card for the case (*Figure 9-46)*.

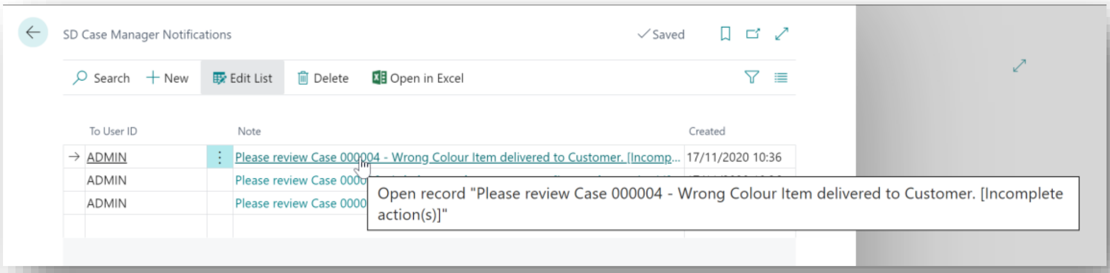


Figure 9-46

You will also see SD Case Manager escalation notifications in the **SD Case Manager Cases** list and can see any notes that have been created and attached to the Case (*Figure 9-47)*.

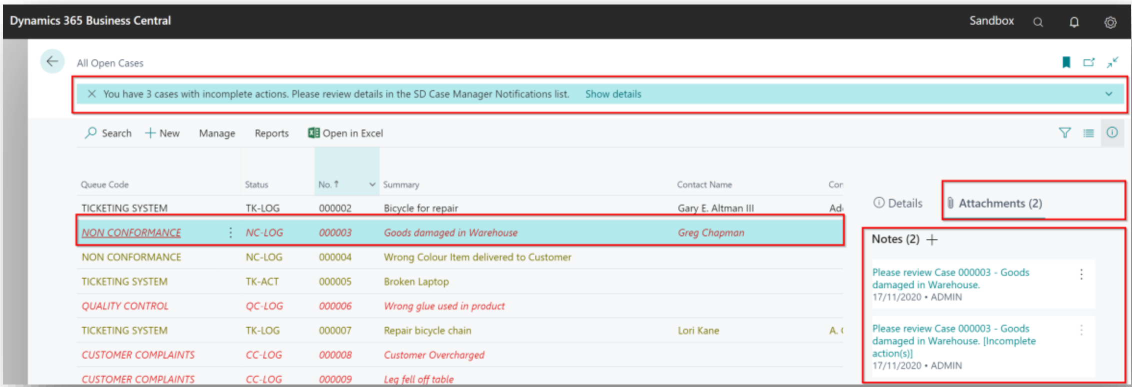


Figure 9-47

10 Executing Escalation Rules Manually

To execute Escalation Rules manually, navigate to the **SD Case Manager – Manager Role Centre.** From the **Actions** tab**,** in the **Process** group, select **Execute Escalation Rules.** Alternatively, from the **SD Case Manager Setup** in the **Home** tab**,** in the **Process** group, select **Execute Escalation Rules** (*Figure 10-1*).

Choosing this action will execute the Escalation Rules that you have defined for Cases in the Queues based on the currently calculated Total Duration and Current Duration for each Case (Please see the section on Escalation Rules).

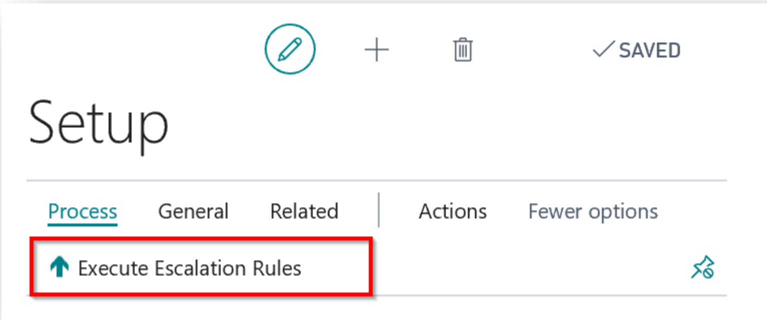


Figure 10-1

11 Executing Escalation Rules Automatically

The SD Case Job Queue Entries are used to Execute Escalation Rules automatically (*Figure 11-1)*.

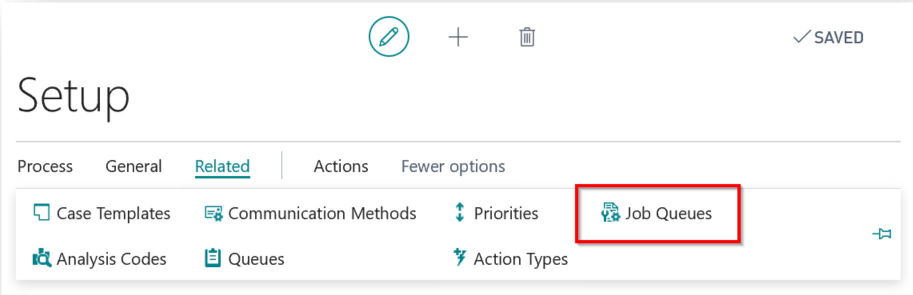


Figure 11-1

As a pre-requisite, you must have Job Queues already setup and running in Microsoft Dynamics NAV.

To set up a Job to Execute Escalation Rules in SD Case Manager:

1. Navigate to the **SD Case Manager Setup** Page. In the **Home** tab, in the **General** group, choose **Job Queues**.

2. In the **Job Queue Entries** List, create a **New** Job Queue Entry.

3. In the Job Queue Entry Card, enter a **Description** and select the required **Document Type**. Update the **Schedule** and **Recurrence** details in the Job Queue Entry Card as required.

4. Choose **OK** to save the Job Queue Entry.

5. When you have reviewed your Job Queue Entry, set the Status of the Job Queue Entry to **Ready**.

According to your Schedule Details for the Job Queue Entry, the Job Queue Entry will automatically Execute Escalation Rules for the Cases.