



Document	iDynamics Incident Management		
Title	<i>User's guide</i>		
Class.	<b>Microsoft Dynamics 365 Business Central</b>		
Code	IDPIMG – KUS	Date	11/09/2018

## ***IDYNAMICS INCIDENT MANAGEMENT***

### ***USER'S GUIDE***

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## iDynamics Incident Management

*iDynamics Incident Management* is an extension dedicated to manage incidents that occur during the standard sales or purchase processes of Microsoft Dynamics 365 Business Central and Dynamics NAV.

The extension adds options for:

- Create tickets related to one, or more, purchase or sales documents.
- Create tasks and follow-up actions related to these tickets.

## Introduction

The extension allows the management of incidents related to suppliers and customers with respect to the company's purchases and sales, including the central warehouse receipts, so that it covers not only the purchase and sale operations affected by an incident, but also the rest of the internal operations (Administrative tasks, etc.) at the same time.

For all this, there is a specific maintenance of incidents and uses the tasks and interactions of the CRM module of Microsoft Dynamics 365 Business Central / Dynamics NAV that will be linked to the incidents, thus obtaining a vision and planning of work to be done (tasks) and actions performed (interactions).

The origin of data entered in the system that may be related to an incident will be as follows:

- Sales
  - Sales Shipment
  - Sales Posted Invoice
  - Sales Return Rcpt
  - Sales Posted Cr. Memo
- Purchases
  - Purchases Order
  - Purchases Invoice
  - Purchases Credit Memo
  - Purchases Receipt
  - Purchases Posted Invoice
  - Purchases Return Shpt.
  - Purchases Posted Cr. Memo
- Warehouse
  - Warehouse Receipt
  - Warehouse Posted Receipt
  - Warehouse Posted Shipment



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## Setup

Incidents are identified by a serial number, and therefore, in order to create incidents, it is necessary to select the setup of serial numbers to be used. In the case of Microsoft Dynamics 365 Business Central, during the extension installation process, a setup wizard is run to facilitate this step. In the case of Dynamics NAV, or if you want to modify this configuration, you must access "Incident setup":

No. Series List ▾

Code	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Default Nos.	Manual Nos.	Date Order
IC_DIGEN	Diario general IC	IC0010	IC9999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INCID	Incidencias	INC-00001	INC-99999	23/01/2020	INC-00001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LAN-M	Ordenes lanzadas	101001	102999	01/01/2019	101003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LMPROD	LM producción	P00010	P99990			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
LOTE	Numeración lote	LOT0001	LOT9999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MEN SEPACT	Id. mensaje transf. créd. SEPA	1001	2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Category and Incident type

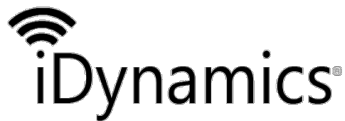
To facilitate the management of incidents, they can be classified by *category* and by *type* of incident. Therefore, it is recommended to create the *categories* and their corresponding *types* before starting to work with the incidents. To do this, access the *categories of incidents* page.



### Incident Categories

Search	+ New	Edit List	Delete	Manage	Open in Excel	
CODE			DESCRIPTION			
ENVIOS		:	Envios			
PRODUCCION			Produccion			
VENTAS			Ventas			

Within each category, the types of incident that exist for each case must be defined. To access to the types of incidents, go to the page *incident types* or from the page *incident categories* by clicking on the button "Types of incidents".



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## Incident Categories

Search	+ New	Edit List	Delete	Manage	Open in Excel	
Incident Types						
ENVIOS	:	Envios				
PRODUCCION	:	Produccion				
VENTAS	:	Ventas				

## Activities by type of incident

For each *type* of incident, the *activities* to be performed are defined, choosing the execution of them as it is shown in the following image.

### Incident Types

The screenshot displays the 'Incident Types' interface. At the top, there's a list of incident types with columns for Category Code, Code, and Description. The list includes 'PRODUCCION', 'DEFECTO', and 'PERDIDA'. Below the list, two 'Incident Type Card' examples are shown. The first card is for 'PRODUCCION · PERDIDA · Error en la producción' and the second is for 'PRODUCCION · DEFECTO · Objetos defectuosos'. Each card has a 'General' tab with fields for 'Category Code' and 'Code', and an 'Activities' tab with a table of steps and activity codes.

STEP NO.	ACTIVITY CODE	DESCRIPTION
1	TALLER	Tareas taller
2	PROPUESTA	Tareas de propuesta
3	P-PRES	Presentación prod.

STEP NO.	ACTIVITY CODE	DESCRIPTION
1	NECES	Analizar los defectos con los clientes
2	PROPUESTA	Tareas de propuesta
3	P-PRES	Presentación prod.

Then you choose an activity code that can be defined previously or defined at the moment. This activity code will be associated with a general description that can be modified as desired.



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INCIDENTTYPE CARD



## PRODUCCION · DEFECTO · Objetos defectuosos

### General

Category Code ..... PRODUCCION

Description ..... Objetos defectuosos

Code ..... DEFECTO

### Activities

### Manage

STEP NO.		ACTIVITY CODE	DESCRIPTION
1	⋮	NECES	Analizar los defectos con los clientes
2		PROPUESTA	Tareas de propuesta
3		P-PRES	Presentación prod.

## Tasks template by activities

You can define tasks by accessing the list of activities. From there, by entering the code of the activity for which you want to define its tasks, a page like the one below will open:



ACTIVITY



## NECES · Analiz. tareas a realizar

### Page

Code ..... NECES

Description ..... Analiz. tareas a realizar

### Lines

### Manage

TYPE		DESCRIPTION	PRIORITY	DATE FORMULA
	⋮	Est. neces. cliente	Low	
Phone Call		Fijar reunión	Normal	+3D
Meeting		Examinar neces. y expectativas	High	+2W
		Verifica/camb. neces. cli.	Normal	+3W

These tasks, associated with the different activities, will act as a template when automatic tasks are generated, in such a way that all the tasks associated with the defined activities will be generated.



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## Incidents

From the list of requests, you can create new ones or consult the existing ones. Additionally, it is possible to navigate to an issue from the source documents.

Once inside an incidence, a screen like the following one will be displayed:

The screenshot displays the 'INCIDENT CARD' for 'IN000001 · Producto defectuoso'. The interface includes a top navigation bar with 'Process', 'Navigate', 'Marketing', and 'More options'. Below this is a 'General' section with various fields for incident details. A 'TASKS' section shows 'Open Tasks' (5) and 'Closed Tasks' (2). At the bottom, there is a 'Source Lines' table with columns for document type, number, line number, type, number, description, source type, customer code, customer/vendor name, sales person code, and sales name.

Source Lines		Manage	More options							
DOCUMENT TYPE	DOCUMENT NO.	DOCUMENT LINE NO.	TYPE	NO.	DESCRIPTION	SOURCE TYPE	CUSTOMER CODE	CUSTOMER/VENDOR NAME	SALES/PU... PERSON CODE	SALES NAME
Sales Shpm...	102001	10000	Item	1928-S	Lámpara ÁMSTERDAM	Customer	20000	Trey Research	MS	Miguel

## Header

**No:** This is the code that uniquely identifies each incidence; the system automatically creates a number based on the standard serial number functionality.

**Description:** Descriptive text of the incident.

**Category code:** The category allows to classify incidences for easy management. The value is selected from the the category code table.

**Incident type code:** The type of incident allows a second level of classification of the incidents. The incident types are linked to the categories, so to be able to select the type, it is necessary to have previously selected a category. When selecting a value, if the request type has associated tasks, these will be created associated with the requests.

**Status:** Possible options are *open* or *closed*. Specifies whether or not the incidence is pending resolution.

**Creation date:** The date on which the incidence was created within the system. It is not editable by the user.

**User creation:** User who has created the incidence.

**Priority:** The priority of the incidence (*Normal*, *High* and *Low*).



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*Originated by:* Indicates where the incident was originated. It can be an entity (e.g. Supplier), a department (e.g. Warehouse), or any other entity/group that can be useful in obtaining incident statistics.

*Communicated by:* Indicates who detected the incident. It can be a person (e.g. Customer), a department (e.g. Sales) or any other entity/group that can be useful in obtaining statistics on incidents.

*Assigned user ID:* The user assigned to manage the incident.

In the **Tasks** section:

*Automatic tasks generated:* It will be checked if the tasks configured for the selected incident type have been created.

*Pending tasks:* The number of opened tasks associated with the incidence.

*Tasks accomplished:* The number of closed tasks associated with an incidence.

If we click the number that appears on the right side it is possible to navigate to the task list:



## Task List

Search	Manage	Process	Open in Excel	Actions	Navigate	...		
CLO...	DATE	TYPE	DESCRIPTION	PRIORITY	STATUS	ORGANIZER TASK NO.	DATE CLOSI	
<input type="checkbox"/>	03/10/2018			Normal	Not Started	TA000006		
<input type="checkbox"/>	03/10/2018		Verifica calidad de oport.	High	Not Started	TA000007		
<input type="checkbox"/>	10/10/2018		Identif. per. clave	Normal	Not Started	TA000008		
<input type="checkbox"/>	04/10/2018	1	Reunión principal	Low	Not Started	TA000009		
<input type="checkbox"/>	17/10/2018	Phone Call	Llamada urgente	High	Not Started	TA000010		
<input type="checkbox"/>	03/10/2018			Normal	Not Started	TA000012		

## Lines of origin

As for the lines of origin, this will be the area where the lines of a document with an incidence will appear. Among the fields to be filled in, the following stand out:

*Document type:* the document type to which the row belongs. You can choose between the different options shown in the image.





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Source Lines		Manage	More options							
DOCUMENT TYPE	DOCUMENT NO.	DOCUMENT LINE NO.	TYPE	NO.	DESCRIPTION	SOURCE TYPE	CUSTOMER CODE	CUSTOMER/VENDOR NAME	SALES/PU... PERSON CODE	SALES NAME
Sales Shpm...	02001	10000	Item	1928-S	Lámpara ÁMSTERDAM	Customer	20000	Trey Research	MS	Miguel

✓

Sales Shipment

Sales Posted Invoice

Sales Return Rcpt.

Sales Posted Cr. Memo

Whse. Posted Shipment

Purch. Order

Purch. Invoice

Purch. Credit Memo

Purch. Receipt

Purch. Posted Invoice

Purch. Return Shpt.

Purch. Posted Cr. Memo

Whse. Receipt

Whse. Posted Receipt

*Document number:* The document number to which the row belongs. *Document line number:* The line number in the original document. All other fields are filled in automatically.

From the line drop-down menu, you can access to all the options that the lines have:

Source Lines	Manage	Line	Less options
Show Original Doc.	Comments	Tasks	Interaction Log Entries

See original document

The original document the row belongs to



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## General

[Show less](#)

No. ....	102001	Posting Date ....	17/01/2017
Customer ....	Trey Research	Document Date ....	17/01/2017
SELL-TO		Requested Delivery Date ...	
Address ....	Southwark Bridge Rd, 91-95	Promised Delivery Date ...	
Address 2 ....		Quote No. ....	
City ....	Valencia	Order No. ....	
Post Code ....	46010	External Document No. ....	
Country/Region ....	ES	Salesperson Code ....	MS
Contact No. ....	CO000003	Responsibility Center ....	
Contact ....	Isabelina Castaneda	WORK DESCRIPTION	
No. Printed ....	0		
Incident Count ....	3		

Lines	Manage	More options				
TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	
Item	1928-S	Lámpara ÁMSTERDAM		3	UDS	
						<a href="#">Close</a>

## Comments

Write line-level comments.

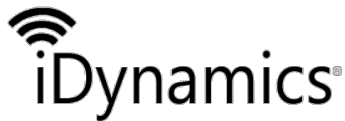
EDIT - COMMENT SHEET - IN000001 + [New](#)



DATE	COMMENT
09/04/2018	Llamar proveedor

## Tasks

Tasks associated with that line.



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## Task List

Search	Manage	Process	Open in Excel	More options									
CLO...	DATE	TYPE	DESCRIPTION	PRIORITY	STATUS	ORGANIZER TASK NO.	DATE CLOSED	CA...	COM...	CONTACT NO.	SALESPEERS... CODE	TEAM CODE	
<input checked="" type="checkbox"/>	02/10/2018			Normal	Completed	TA000002	02/10/2018	<input type="checkbox"/>	No	CO000003	MS		
<input checked="" type="checkbox"/>	03/10/2018			Normal	Completed	TA000003	02/10/2018	<input type="checkbox"/>	No	CO000003	MS		
<input type="checkbox"/>	03/10/2018			Normal	Not Started	TA000006		<input type="checkbox"/>	No	CO000003	MS		
<input type="checkbox"/>	03/10/2018		Verifica calidad de oport.	High	Not Started	TA000007		<input type="checkbox"/>	No	CO000003	MS		
<input type="checkbox"/>	10/10/2018		Identif. per. clave	Normal	Not Started	TA000008		<input type="checkbox"/>	No	CO000003	MS		
<input type="checkbox"/>	04/10/2018	1	Reunión principal	Low	Not Started	TA000009		<input type="checkbox"/>	No	CO000003	MS		
<input type="checkbox"/>	17/10/2018	Phone Call	Llamada urgente	High	Not Started	TA000010		<input type="checkbox"/>	No	CO000003	MS		

## Movs. interaction log

Movements generated by closed interactions.



## Interaction Log Entries

Search	Process	Open in Excel	More options									
CA...	ATT... FAL...	DATE	INTERACTION TEMPLATE CODE	DESCRIPTION	ATT...	CONTACT NO.	CONTACT NAME	CONTACT COMPANY NAME	EVALUATI...	COST (LC		
<input type="checkbox"/>	<input type="checkbox"/>			Mov. log interaction		CO000003	Trey Research	Trey Research		0,0		

If you are not in Microsoft Dynamics 365 Business Central, the options will appear at the bottom as shown in the image:

Source Lines			
	Line		Find
	Filter		Clear Filter
	Show Original Doc.	Document	Type
	Comments	Line No.	No.
	Tasks	10000	Item 8916-
	Interaction Log Entries	20000	Item 8916-
	Sales Posted ... 103033	10000	Item 8916-

## Action bar

As for the actions that can be performed in an incident are highlighted:



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## Process section

Process	Navigate	Marketing		<a href="#">Actions</a>	Navigate	Less options
Close Incident	Reopen Incident	Marketing				

*Close an incidence:* Only the person responsible for the incidence will be able to close the incidence, when the incidence is closed a question will be displayed to the user indicating if he wants to close all the pending tasks. The status of the incident is now closed. You will be asked for a code whose fields is mandatory to proceed with the closing.

CLOSE INCIDENT - IN000001 - PRODUCTO DEFECTUOSO



### Final Status

Whas this incident solved or not?

Unsolved



### Description

Please give a brief description explaining how the incident was solved, or why it was not.

There are not enough resources

### Reason Code

Please choose a code that categorises the reason why this incident has been closed.

NO RESUELTA



*Reopen an incidence:* An incidence that is in closed state can be reopened, only by the person responsible for it, the state becomes open. The code reason for reopening must be indicated.

REOPEN INCIDENT - IN000002 - PRODUCTO DEFECTUOSO



### Details

Please give a brief description explaining why the incident is being reopened.

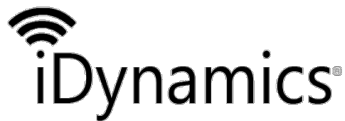
New associated resources

### Reason Code

Please choose a code that categorises the reason why this incident has been reopened.

POSIBLE SOLUCIÓN





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## Navigation section

Process

Navigate

Marketing

Actions

Navigate

Less options

Incident ▾

Marketing ▾

**Comments:** You can generate comments at the line level (one line of a request) or at the header level which would be this case.

← IN000003

## Comment Sheet

Search	+ New	Edit List	Delete	Open in Excel	
DATE	COMMENT				
09/04/2018	Ponerse en contacto con el cliente para averiguar el estado de satisfacción				

**Tasks:** Access the list of tasks.

## Task List

Search   Manage   Process    Open in Excel       Actions   Navigate   Less options												
CLO...	DATE	TYPE	DESCRIPTION	PRIORITY	STATUS	ORGANIZER TASK NO.	DATE CLOSED	CA...	COM...	CONTACT NO.	SALESPEERS... CODE	TEAM CODE
<input checked="" type="checkbox"/>		02/10/2018		Normal	Completed	TA000002	02/10/2018	<input type="checkbox"/>	No	CO000003	MS	
<input checked="" type="checkbox"/>		03/10/2018		Normal	Completed	TA000003	02/10/2018	<input type="checkbox"/>	No	CO000003	MS	
<input type="checkbox"/>		03/10/2018		Normal	Not Started	TA000006		<input type="checkbox"/>	No	CO000003	MS	
<input type="checkbox"/>		03/10/2018	Verifica calidad de oport.	High	Not Started	TA000007		<input type="checkbox"/>	No	CO000003	MS	
<input type="checkbox"/>		10/10/2018	Identif. per. clave	Normal	Not Started	TA000008		<input type="checkbox"/>	No	CO000003	MS	
<input type="checkbox"/>		04/10/2018	1   Reunión principal	Low	Not Started	TA000009		<input type="checkbox"/>	No	CO000003	MS	
<input type="checkbox"/>		17/10/2018	Phone Call   Llamada urgente	High	Not Started	TA000010		<input type="checkbox"/>	No	CO000003	MS	

**Show type:** Only appears in the web client. If we are in the web client, some fields of the general section will not allow us to navigate through because of that it is enabled a button in this section, from which we can access the type of incidence. This option will open the table where you can fill in the different activities of the task pattern, so it will only make sense if you are going to generate tasks automatically.



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INCIDENTTYPE CARD



## ENVIOS · PERDIDA · Perdida de un producto en el envío



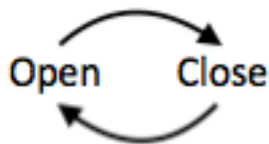
### General

Category Code ..... ENVIOS Description ..... Perdida de un producto en el e...  
Code ..... PERDIDA

Activities | Manage

STEP NO.	ACTIVITY CODE	DESCRIPTION
1	TINIC	Recuento
2	REENV	Reenvio de producto

*Movements:* They are generated when an incidence is closed or reopened. These are the movements of an incident.



IN000001

## Incident Entries

INCIDENT NO. ▼	DATE	TIME	USER	ACTION	DESCRIPTION	CLOSING/R. CODE
IN000001	02/10/2018	16:24:17	ADMINISTR...	Close	Solucionado el problema	NO RESUEL



IN000001

## Incident Entries

INCIDENT NO. ▼	DATE	TIME	USER	ACTION	DESCRIPTION	CLOSING/R. CODE
IN000001	02/10/2018	16:24:17	ADMINISTR...	Close	Solucionado el problema	NO RESUEL
IN000001	02/10/2018	16:26:11	ADMINISTR...	Reopen	Nuevos recursos adjudicados	POSIBLE SC

*Movs.Interaction log:* Movements generated when interactions are created.



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CREATE INCIDENT INTERACTION - IN000001 - PRODUCTO DEFECTUOSO



### Incident

No. .... IN000001  
Line No. .... 10000 ...

### Interaction Details

Show more

Contact ..... CO000003 Date .....  
Salesperson ..... MS Initiated By ..... Us  
Description ..... Movs. log interaction Evaluation .....



## Interaction Log Entries

CA...	ATT...	DATE	INTERACTION TEMPLATE CODE	DESCRIPTION	ATTA...	CONTACT NO.	CONTACT NAM
<input type="checkbox"/>	<input type="checkbox"/>			Mov. log interaction		CO000003	Trey Research
<input type="checkbox"/>	<input type="checkbox"/>			Movs. log interaction		CO000003	Trey Research

### Marketing section

From here you can create a new task associated with the incident manually or automatically.

Process	Navigate	Marketing	Actions	Navigate	Less options
<input checked="" type="checkbox"/> Create Related Task	Create Related Interaction	Generate Automatic Tasks			

Create task: Action to create a new task associated with the incident. In the task, the associated contact will be indicated manually. Only one contact related to the customer/supplier associated with the incident can be selected. If the line number of the request is chosen, the seller's field (compulsory) will be filled in only as it is associated with the line number. You must select a start date.



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CREATE INCIDENTTASK - IN000001 - PRODUCTO DEFECTUOSO



## Incident

No. .... IN000001  
Line No. ....

## Task data

Contact .....  
Salesperson ..... \*  
Task .....  
Description .....  
Start Date ..... \*  
Task

← TASK CARD



# TA000012

Process | Actions | Navigate | Less options



## General

No. .... TA000012  
Description .....  
Location .....  
Salesperson Code .... MS  
No. of Attendees ..... 0  
Attendees Accepted ... 0  
Contact No. .... CO000003  
Contact Name .... Trey Research  
Contact Company Na... Trey Research  
Team Code .....  
Completed By .....  
Status ..... Not Started  
Priority ..... Normal  
Type .....  
All Day Event .....  
Date ..... 03/10/2018  
Start Time .....  
Duration .....  
Ending Date ..... 03/10/2018  
Ending Time ..... 0:00:00  
Canceled .....  
Closed .....  
Date Closed .....

## Related Activities

Campaign No. ....  
Campaign Description ..  
Opportunity No. ....  
Opportunity Descripti...  
INCIDENT  
No. .... IN000001  
Description .... Producto defectuoso

Once accepted, the task will be opened and can be managed by the marketing department.





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Create interaction: Action to create a new interaction associated with the incidence. In the interaction the associated contact will be indicated manually, only a contact related to the customer/supplier associated with the incident can be selected.

CREATE INCIDENT INTERACTION - IN000001 - PRUEBA



#### Incident

No.	IN000001	Line No.	>
-----	----------	----------	---

#### Interaction Details

Show more

Contact		Date	
Salesperson	*	Initiated By	
Description		Evaluation	

Generate automatic tasks: Used to generate tasks that are associated with n activities. List of tasks included in an activity and n activities associated with an incidence TYPE. From this action, all the tasks included and those responsible for these activities will be launched, with the calculation of dates from the date of the incident.



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CREATE INCIDENTTASK - IN000001 - PRODUCTO DEFECTUOSO

### Incident

No. .... IN000001  
Line No. ....

### Task data

All tasks configured for the activities of the incident type will be created using the following values.

Incident Type Activities ....

Contact .....  
Salesperson .....  
Start Date ..... \*

STEP NO.	ACTIVITY CODE	DESCRIPTION
1	TINIC	Recuento
2	REENV	Reenvío de producto

← INCIDENT TYPE CARD



PRODUCCION · DEFECTO · Objetos defectuosos

### General

Category Code .... PRODUCCION Description .... Objetos defectuosos  
Code .... DEFECTO

Activities	Manage		
	STEP NO.	ACTIVITY CODE	DESCRIPTION
	1	NECES	Analiz. tareas a realizar
	2	PROPUESTA	Tareas de propuesta
	3	P-PRES	Presentación prod.

In the previous illustration (example) you can see the activities that are included in the type of incident SALES - TEST. The incidence type code has been selected in the general section and when automatic tasks are generated it will be the one generated.

In order to assign different activities to a type of incidence, you can do it from the detail of the type of incident by accessing as in the image 27, 28 and 29 or directly from the screen of the type of incident and editing it.



Document	iDynamics Incident Management		
Title	User's guide		
Class.	Microsoft Dynamics 365 Business Central		
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In the case of automatic tasks you will not be able to modify a field that was editable before:

General	
No. ....	IN000001
Description .....	Producto defectuoso
Category Code .....	ENVIOS
Incident Type Code .....	PERDIDA
Status .....	Open
Reported On .....	09/04/2018
Reported By .....	ADMINISTRADOR
Priority .....	Normal
Incident Source .....	
Notified By .....	
Assigned User ID .....	...
TASKS	
Automatic Tasks Generated .....	<input type="checkbox"/>
Open Tasks .....	6
Closed Tasks .....	2