

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Case Manager

Release: D365 BC V24+

Revision: September 2024





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2 Getting Started

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

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 are managed and defined using Queue Statuses and Action Types.

Using Case 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 within a Queue that has a defined Template, or, when a Category with a defined Template is added to a Case, these template Case Actions (and any files attached to the template Case Action) are automatically created on the Case.

This flexibility allows SD Case Manager to log and track Case Actions and resolutions for different streams of Cases in various concurrent ways such as:

- Customer Complaints
- Ticketing Systems
- Quality Assurance and Control
- Non Conformance

SD Case Manager also allows you to set up user-definable and configurable Escalation Rules to escalate Cases by sending emails or creating notifications for users assigned to any incomplete Case Actions or to Case Watchers, notifying internal and external parties on case progress.

Email Templates which can contain variable placeholder data in the Email Subject and Body can be used to facilitate effective communication to your Case Contact at the various stages of the Case.

Creating an Azure Portal Registered App allows you to monitor Email Inboxes to create and update Cases from incoming emails.





3 Installing SD Case Manager

SD Case Manager is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

The **Allow HttpClient Requests** option is automatically enabled on install of SD Case Manager. Switching on the **Allow HttpClient Requests** option for SD Case Manager in **Extension Management** 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.

3.1 Security Setup

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

Permission Set Lookup			Ż
Permission Set †	Name	Extension Name	Scope 1
→ <u>SDY CSM ADMIN</u>	SD Case Manager - Admin	SD Case Manager	System
SDY CSM USER	SD Case Manager - User	SD Case Manager	System
SDY CSM VIEW	SD Case Manager - View	SD Case Manager	System



We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. Admin includes SDY CSM ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY CSM USER permissions.
- D365 BASIC includes SDY CSM VIEW permissions.





3.2 Choosing the SD Case Manager Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 3-2*).

ventory ~ Posted Documents ~ Setup	& Extensions \lor \equiv					Personalise	
les Journals Cash Receipt Journals Tran	sfer Orders					Design	
						My Settings	
	ACTIONS					Company information	
			+ Sales Credit Memo		> His	Assisted setup	
	+ Sales Invoice	+ Sales Return Order	> Tasks	> Reports		Advanced settings	

Figure 3-2

2. In the My Settings page, on the Role field, select the AssistEdit icon (Figure 3-3).

Role	Business Manager	
Company	CRONUS International Ltd.	
Work Date	1/27/2022	
REGION & LANGUAGE		
Region	English (United States)	
anguage	English (United States)	



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

	Display Name 🗸	
\rightarrow	SD Case Manager Manager	1. E
	SD Case Manager User	·
	SD Bulk Mailer	
	Company Hub	
	Accountant	
	Business Manager	



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





5. The **SD Case Manager Manager** Role should now be displayed in the **Role** field (*Figure 3-5*).

Role	SD Case Manager Manager	
Company	CRONUS International Ltd.	
Work Date	27/01/2022	
Region & Language		
Region	English (United Kingdom)	
Language	English (United Kingdom)	

Figure 3-5

3.3 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 3-6*).

sd case		
Go to Pages and Tasks	Show	ess (3)
> SD Case Manager Cases	Lists	
> SD Case Manager Setup	Administration	
> SD Case Manager Queues	Lists	
> SD Case Manager Watchers	Lists	
> SD Case Manager Statuses	Lists	
> SD Case Manager Templates	Lists	
> SD Case Manager Priorities	Lists	
> SD Case Manager Open Cases	Tasks	

Figure 3-6





3.4 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** card. When the **SD Case Manager Setup** opens, you will be prompted that "Your SD Case Manager license needs to be validated". Choose **Yes** (*Figure 3-7*).

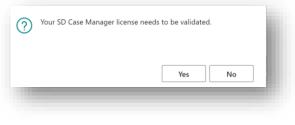


Figure 3-7

2. You will then see the **Activate your product** page.

3.4.1 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:

 In the Activate your Product page (Figure 3-8): Enter your company name in Company Name Enter your company email in Email. Choose Free Trial.

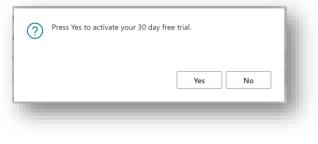
Activate your pr	oduct	\mathcal{Z} \times
Shop		
Company Name	*	
Email · · · · · · · · · · · · ·	*	
Product Key		
Valid · · · · · · · · · · · · · · · · · · ·		
License Type		
Expiry Date		
	nis product has expired and the p tt Simply Dynamics for a new Pro	
F.		







2. You are then prompted to choose **Yes** to activate your free trial (*Figure 3-9*).





3. 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 3-10*).

Shop		
Company Name		
Email · · · · · · · · · · · · · · · · · · ·		
Product Key		
Valid · · · · · · · · · · · · · · · · · · ·		
License Type	trial	
Expiry Date	07/01/2022	
Activation successful!Thank yo Your license expires on 1/7/20		
Free	Trial Request Subscription	Activate

Figure 3-10

- 4. Choose **Finish** to exit the page.
- 5. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.





3.4.2 Activating the SD Case Manager Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd.:

 In the Activate your product page (Figure 3-11). Enter your company name in Company Name. Enter your company email in Email.

Paste the supplied product key into the **Product Key** field. **Tab off the Product Key** field to validate the contents of the field and to enable the Activate key. Choose Activate

Activate your p	ouuci		2	
Shop				
Comment				
Company Name				
Email · · · · · · · · · · · · · · · ·				
Product Key				
Valid · · · · · · · · · · · · · · · · · · ·		\supset		- 1
License Type				18
Expiry Date				1
				- 1
				L.
	Free Trial	Request Subscripti	on Activate	e

Figure 3-11

2. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the details of your subscription.





3.5 Setup and Configuration

3.5.1 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. In the **SD Case Manager Setup**, from the menu choose the **Home** group, and then **Assisted Setup** (*Figure 3-12*).

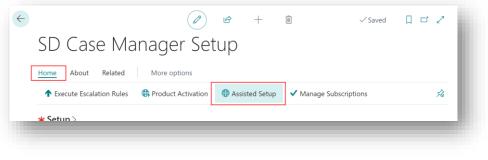
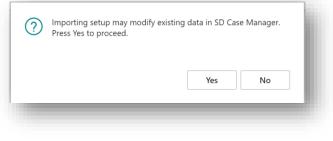


Figure 3-12

1. You are prompted as per the below. Choose **Yes** if this is your first time to use SD Case Manager and you have not already created any setup data (*Figure 3-13*).





2. You are prompted again, choose **Yes.** You will see message that the default setup has imported. Choose **OK** (*Figure 3-14*).

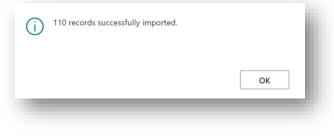


Figure 3-14





3.5.2 Creating an Azure Portal Registered App

If you want to monitor your **Email Inboxes** to create cases or use an Email API to send emails from SD Case Manager you need to create an Azure Portal registered app.

To use Microsoft Graph to monitor your email inboxes and send emails in SD Case Manager, you must firstly register an App in Azure:

- 1. Log into your Azure portal.
- 2. Search for and navigate to "App Registrations".
- 3. Choose "Register an Application" to create a new App.
- 4. Give your App a name.
- 5. In the "Supported account types" section, choose the first option, "Accounts in this organizational directory only".
- 6. Select "Register "

Once you have registered the App in Azure, you are brought to the page for your newly created App. In this page:

- 1. Take note of your Application (client) ID.
- 2. Choose the Certificates and Secrets tab and choose "New client secret" to create a new secret.
- 3. Take a note of the Client Secret.

You then need to give your App certain API permissions. From the same page:

- 1. Navigate to the API permissions tab and choose "Add permission".
- 2. Choose "Application permissions"
- 3. From the list of "API/Permissions name", select Email Read, Email Write and Email Send API permissions.
- 4. Set "Admin consent required" to yes.





4 Using SD Case Manager

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

4.1 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 page in the Tell Me (*Figure 4-1*).

	Queues Case Te	All Reports		es Categories	Email Inboxes	Email Templates			
	SD Case Manage	er Activities - All							
	Pending Inbox Emails 18	All Open Cases	All Closed Cases	All Active Cases	All On Hold Cases	All Incomplete Actions 30	Incomplete Ac Past Due	کې Setup	Execute Escalati Rules
	>	>	>	>	>	>	>		



In the **SD Case Manager Setup** page, the **General** FastTab contains the following fields (*Figure 4-2*):

SD Case Mana	ader Se	tup				
	iger se	сар				
Home About Related Au	tomate \lor Fewe	er options				
🕈 Execute Escalation Rules 🛛 🤀 F	Product Activation	🕀 Assiste	d Setup	🗸 Manage	Subscriptions	
General						
No. Series	S	D-CASE				· · · · · · · · · · · · · · · · · · ·
Case Link Handling	A	dd				×
Mandatory Case Fields						
Summary	••••••	D				
Category · · · · · · · · · · · · · · · · · · ·	••••••					
Sub Category						
Reporter						
Status		D				



• No. Series – Select the No. Series to use when creating cases in SD Case Manager.





- **Case Link Handling** Choose how to handle record links on Case Actions for end-oflife transactions when the original documents are posted. Applies to Sales and Purchase Quotes, Orders, Credit Memos, and Invoices.
 - **Ignore** The record link on the Case Action is not updated.
 - **Modify** The record link on the Case Action is modified to link to the newly created document.
 - Add A new record link to the newly created document is created on the Case Action.
 - **Delete** The record link to the end-of-life transaction is deleted when the document is posted.
- Mandatory Case Fields Specify what fields must be entered on a Case card before a case can be saved.

In the **Email** FastTab, you define the setup to use for logging and updating cases from incoming emails and for sending emails from SD Case Manager (*Figure 4-3*):

Email	
General Emails	
Application ID	
Client Secret	
Delete API Logs After	1 Month ~
Sending Emails	
mail Service	Email API
mail Outbox CC Address	
Enforce Email Dialog	
Monitoring Emails	
Delete Email Archive After	1 Month v



- Application ID Applicable if you want to monitor your Email Inboxes or if the Email Service is set to Email API. Enter the Application ID of your Azure Portal registered app that has been setup with Email Read/Write and Email Send API permissions. This app is used to monitor the Email Inboxes and is also used to send emails from SD Case Manager when the Email Service is set to Email API.
- **Client Secret** –Enter the Client Secret for your Azure Portal registered app.
- **Delete API Logs After** Specify when to delete the API logs of your Azure Portal registered app.





- Email Service Choose whether to send outgoing emails from SD Case Manager using standard Business Central Email Accounts or an Email API (your Azure Portal registered app).
- **Email Account** Applicable if **Email Service** is set to **Email Accounts**. Choose the email account to use when sending outgoing emails.
- Email Outbox CC Address Choose an email account to CC emails to when sending outgoing emails.
- **Enforce Email Dialog** Choose this option if you want to prompt the user to send an email from one of the **Email Templates** when exiting the case card.
- **Delete Email Archive After** Specify when to delete the records in the Email Archive.

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

Queues · · · · · · · · · · · ·	4	Communication Met	6
Case Templates	4	Email Inboxes	2
Priorities	4	Email Templates	44
Action Types	4	Job Queue Entries	21

Figure 4-4





4.2 Queues

A Queue in SD Case Manager is a grouping of cases. Using Queues, you set up flexible userdefinable workflows (using Statuses and Action Types) for cases logged 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. Cases can move between Queues. 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; to Managers; and to Watchers of the case. Escalation Rules can also be defined to add Watchers to a case.

Defining a Template Code for a Queue allows you to specify Template Actions that are automatically applied to each newly created case in the Queue.

The **Queues List** (*Figure 4-5*) is accessed from the **Case Manager Setup** or by searching the Tell Me. To access an existing Queue from the Queue List, from the **Manage** menu group, select **View**, or **Edit**. To create a new Queue, from the menu, select **New**.

🕼 -> 🕫 📔 + New	Manage Reports More options							
🖉 Edit 🗇 View 📋 Delete								
Code †	Description	Default Case Status	Default Case Action Type	Template Code				
CUSTOMER COMPLAINTS	Customer Complaints	1CC-QUAL	UPDATE	CC-TEMPLATE				
NON CONFORMANCE	Non Conformance Tracking	1NC-QUAL	UPDATE	NC-TEMPLATE				
QUALITY ASSURANCE	Quality Assurance and Control	1QA-QUAL	UPDATE	QA-TEMPLATE				

Figure 4-5





The Queue Card contains the following fields in the **General** FastTab (*Figure 4-6*):

	\bigcirc
TICKETING HELPDESK	
Reports Automate V Fewer options	
a Queue Report a Case Report	
General	
Code · · · · · · TICKETING HELPDESK	Default Case Status 1TK-QUAL
Description Ticketing Helpdesk	Default Case Action Type
Blocked · · · · · · · · · · · ·	Email Inbox Admin
	Email Outbox Address



- **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 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 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.
- Email Inbox Admin Enter a User to default to the Manager field when creating a Case from an email that has a Queue Code specified on the Email Inbox Pending list.
- Email Outbox Address Chose the email outbox to use when sending emails from cases logged in this Queue. Applicable if the Email Service has been set to Email API on the SD Case Manager Setup card.





Expand the Additional FastTab (Figure 4-7):

emplate Code	TICKET-TEMPLATE	\sim	Template Description	Ticketing System Template
ueue Report No.	43001000	\sim	Queue Report Name	SD Case Manager Queue Report
ase Report No.	43001001	\sim	Case Report Name	SD Case Manager Case Report
				De case manager case neport



- **Template Code** Defining a Case Template allows you to specify Template Actions to automatically apply to cases created in the Queue.
- Queue Report No. Choose from a list of Reports. SD Case Manager has a preconfigured Queue Report, SD-CSM Queue Report (ID 43001000). The Queue Report can be run from the Queues List or from the Queue Card.
- **Case Report No.** Choose from a list of Reports. SD Case Manager has a pre-configured Case Report, **SD-CSM Case Report** (ID **43001001**). The Case Report can be run from the Queue List or from the Queue Card.

Expand the **Statuses** FastTab (*Figure 4-8*):

	Code 1		Description	State	Closed
\rightarrow	1TK-QUAL	÷	Log and Qualify	Active	
	2TK-ACTIVE		Active	Active	
	3TK-HOLD		On Hold	Active	
	4TK-CLOSED		Closed	Active	



This is a list of the Statuses defined for the Queue. A Status allows you to specify if the Case Status is defined as Inactive or Active, or, if the Case Status is defined as Closed. Each case within the Queue can be assigned a Status Code on the Case Card.

- **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 is manually updated in the Case Card.





- **Active** The State of this Status is Active. For those cases with this Case Status, the State of the case is defined as Active.
- **Inactive** The State of this Status is Inactive. For those cases with this Case Status, the State of the case is defined as Inactive.
- **Closed** For those Statuses that have the Closed checkbox enabled, the Case Status on the case is defined as Closed. When the Case Status on the case is defined as Closed, you cannot create Case Actions for the case.

The **Categories** FastTab (*Figure 4-9*) displays the list of Categories assigned to the Queue and provides a means of classifying cases within Queues. 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 **Card**. To create a new Categories.

3	* New Line	€× D	elete Line 🔳 Card				众
	Code †		Description	Template Code	Sub Categories	Active Open Cases	Inactive Open Cases 🌱
\rightarrow	DATA	÷	Data issues		-	_	_
	HARDWARE		Hardware issues		2	-	-
	OTHER		Other issues		_	_	_
	REPAIR		Repair		_	1	_
	SERVICE		Service		_	_	_
	SOFTWARE		Software issues		_	_	_

Figure 4-9

The **Escalations** FastTab (*Figure 4-10*) is a list of Escalation Rules to apply to cases within the Queue.

ule No. 1		Description	Case State	Case Status	Total Duration	Current Duration	Trigger Interval
10000	:	Notify Assigned User that a Case has been logged	Active	1CC-QUAL	1 hour		1 day
20000		Email Assigned User to Qualify the Case	Active		1 day		1 day
30000		Email Assigned User to Resolve the Case	Active	4CC-CLOSED	3 days		3 days
40000		Add a User Watcher	Active		5 days		5 days



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 and to the Case Watchers. The Escalation Rules also enable you to add specified Watchers to cases.

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 4-11):

	Interaction Group †			Interaction Description	
\rightarrow	PHONE	\sim	:	Telephone conversations	
	MEETING			Meetings	

Figure 4-11

This is a list of the Interaction Groups you can select from when logging an interaction against a Case Action for a case within this Queue. 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 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** to see a list of the default Watchers to auto-assign to cases created in this Queue. (*Figure 4-12*):

	Source 1		No. †	Name	Email	Phone
	User					
\rightarrow	Manual	:		Jane Smith	example@example.com	



A Watcher can be either a Business Central User (a User Watcher) or a Watcher's details can be entered manually. 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.

- **Source** Choose the source of the Watcher to add to the case. Options are **User** or **Manual**.
 - User The Watcher is selected from the list of Business Central Users.
 - **Manual** The Watcher details are entered manually.





4.3 Action Types

Action Types allow you to define user-definable Action Types for cases. Action Types are defined globally in SD Case Manager. 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.

The Action Types List (*Figure 4-13*) is accessed from the **SD Case Manager Setup** by selecting **Action Types** in the **Related** menu group.

Ø	~ /2 🖪	+ 1	New 🐺 Edit List 📋 Delete			¢ 7	
	Code 1		Description	Comment Color	Comment Header Color	Text Color	
\rightarrow	INTERNAL	:	Internal	Cyan	Green	Black	
	LOG		Log	Pink	Begonia	Black	
	QUALIFY		Qualify	Light Yellow 1	Light Yellow 2	Black	
	SCHEDULE		Schedule	Pink	Pink	Black	
	SOLUTION		Solution	Light Purple	Electric Blue	Black	



- **Code** A unique code to identify this Action Type.
- **Description** A user-defined description of the Action Type.
- **Comment Colour** Choose a background colour for the Action Type Comment which will display when you choose the **View Comments** action in the **Case Card**.
- **Comment Header Colour** Choose a background colour for the Action Type Summary which will display when you choose the **View Comments** action in the **Case Card**.
- **Text Colour** Choose a text colour for the Action Type Comment which will display when you choose the **View Comments** action in the **Case Card**.





4.4 Categories

Categories and Sub-Categories are used in SD Case Manager as a means of classifying and grouping cases within Queues. The Categories Card is accessed from the **Categories** FastTab in each individual Queue Card. To access an existing Category, from the FastTab, select **Card**. To create a new Category, from select **New Line** (*Figure 4-14*).

Qu	ieue) E	ŝ +	1	√Sav	red 🖬 🖍
(CUSTC	M	er compl		I TS			
Ca	ategories	ies Manage						
	* New Line	💦 De	lete Line 🔳 Card					Ŕ
	Code 1		Description	Ŷ	Template Code	Sub Categories	Active Open Cases	Inactive Open Cases
	Code i							
-		:	General Complaint			1	1	_

Figure 4-14

The **General** FastTab has the following fields (*Figure 4-15*):

	R COMPLAINTS · PRIC	F
COSTONEI	COMILEANNIS TRIE	L
General		
Code · · · · · · · · · · · · · · · · · · ·	PRICE	
Description	Price Complaint	
Blocked · · · · · · · · · · · · · · · · · · ·	•••••••••••••••••••••••••••••••••••••••	
Managed By		~



- **Code** A unique code to identify this Category. You can specify the Category for the case in the Case Card. (Please see the section on **Cases**).
- **Description** A user defined description of the Category.
- **Blocked** 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.





Expand the Additional FastTab (Figure 4-16):

IICK	eting syst	EM · HA	RDWARE		
General >					
Additiona					
	HARDWARE-TI	MPLATE V	Template · · · · · · · · · · · · · · · · · · ·	Hardware Template	

Figure 4-16

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

In the **Sub Categories** FastTab you define the Sub Categories within the Category. (*Figure 4-17*):

Code 1		Description	Active Open Cases	Inactive Open Cases
DESKTOP		Desktop	-	-
LAPTOP		Laptop	_	_
MONITOR		Monitor	-	_
NETWORK	:	Network	_	_
PRINTER		Printer	_	_
> SERVER		Server		



- **Code** Enter a unique code to identify this Sub Category. You can set the Sub Category for the Case in the Case Card.
- **Description** Enter a user-defined description of the Sub Category.
- Active Open Cases A count of Active Open cases set to the Sub Category Code.
- Inactive Open Cases A count of the Inactive Open cases that have this Sub Category Code.





4.5 Escalations

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. When fired, these Escalation Rules allow you to escalate cases by sending emails or notifications to the Users Assigned to incomplete Case Actions and to the Case Watchers. The Escalation Rules also enable you to add specified Watchers to cases (*Figure 4-18*).

Report Fe	wer options						
ns Manage	2						E
RULE NO. †	DESCRIPTION	CASE STATE	CASE STATUS	TOTAL DURATION	CURRENT DURATION	TRIGGER INTERVAL	DISABL
10000	Notify Assigned User that a Ticket has bee	n I	TK-LOG		3 hours		
20000	Email User that a Ticket must be qualified		TK-QUALIFY	2 days	1 day		
30000	Email Assigned User that a Ticket still Activ	e	TK-ACT	3 days	2 days		
40000	Email Ticket Watchers that Tickets is On H	a	TK-HOLD		1 day	7 days	
50000	Add a User Watcher	Active		7 days		1 day	

Figure 4-18

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**. To create a new Escalation Rule, from the actions on the FastTab, select **New Line** (*Figure 4-19*).

				 + 1 				
HELPDESK	TI	CKETS						
port Report I	ewer op	tions						
calations Mana	je							E2
New Line Note No. 1	e Line		LASE STATE	LASE STATUS	IUTAL DURATION	CURRENT DURATION	IRIGGER INTERVAL	
10000		Notify Assigned User that a Ticket has bee		TK-LOG		3 hours		
20000		Email User that a Ticket must be qualified		TK-QUALIFY	2 days	1 day		
30000	÷.	Email Assigned User that a Ticket still Active		TK-ACT	3 days	2 days		
40000		Email Ticket Watchers that Tickets is On Ho		TK-HOLD		1 day	7 days	
		Add a User Watcher	Active		7 days		1 day	
50000								

Figure 4-19





In the Escalation Card, expand the **General** FastTab Group (*Figure 4-20*):

ESCALATION CARD WORK DATE: 2	8/01/2021		
HELPDESK TI	CKETS · 30000		
Show Attached			
General			
Rule No.	300	00 Total Duration	····· 3 days
Description	Email Assigned User that a Ticket still Active	Current Duration	2 days
Case State		Trigger Interval	
Case Status	TK-ACT	Disabled	

Figure 4-20

- 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 Total Duration of the Status and the State on cases are calculated by stamping a Case Status Log table on change of the 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 this condition of the Escalation Rule to be considered true. The Current Duration of the Status and the State on cases are calculated by stamping a Case Status Log table on change of the 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 4-21*). This is a list of the actions that you want to happen for those cases within the Queue when the Escalations are run.

)					- 1
					-
					62
		USER ID			
	- E				
			USER ID	USER ID	USER ID



- 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. Options are Notify Assigned User, Notify User Watchers, Add a User Watcher, Email Assigned User, Email User Watchers, Email Watchers.
 - Notify Assigned User –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. A note is created for the Assigned User with an attachment/link to the case.
 - Notify User Watchers A notification is sent to the User Watchers of the case. The User Watchers of the case are specified in the Case Contacts FastTab on the Case Card. A note is created for the User Watcher with an attachment/link to the case.





- Add a User Watcher Add the User, specified in the User ID field, as a User Watcher to the case. The User Watchers of the case can be viewed in the Case Contacts FastTab on the Case Card.
- Email Assigned User 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 user. The Assigned User of the Case Action is specified in the Actions FastTab on the Case Card.
- Email User Watchers Send an Email to the User Watchers of the case. The Email address field for the User Watcher is taken from the User table. The User Watchers of the Case are specified in the Case Contacts FastTab on the Case Card.
- Email Watchers Send an Email to the Watchers of the case. The Email address field for the Watcher is taken from the Email address specified in the Case Contacts FastTab on the Case Card.
- 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.

4.5.1 Escalation Notifications

SD Case Manager allows you to define escalation rules with an action to Notify Assigned User and an action to Notify User Watchers. When triggered, a notification is 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 4-22*).

Qb.	V 🔎 🗊 🛛 🐺 Edit List			Ŀ	Y	:=
	Notification ↓	Enabled	Conditions			
	SD Case Manager Escalation notifications	V	(View filter details)			∼
	Purchase document with same external documen		_			







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 4-23*).

λ	Search + New	1	Edit List	📋 Delete	💶 Open in Excel	$\nabla \equiv$
	To User ID		Note			Created
\rightarrow	ADMIN	÷	Please re	view Case 000	004 - Wrong Colour Item delivered to Customer. [Incomp	. 17/11/2020 10:36
	ADMIN		Please re	view Case 000	016 - Label on product not correct. [Incomplete action(s)]	17/11/2020 10:36
	ADMIN		Please re	view Case 000	003 - Goods damaged in Warehouse.	17/11/2020 10:36

Figure 4-23

Selecting the Note URL link will open the Case Card (*Figure 4-24*).

	✓ Search + New	📴 Edit List	📋 Delete	💶 Open in Excel		\ ■		4
	To User ID	Note			c	reated	-	
•		Please re	view Case 000	004 - Wrong Colour Item delivere	ed to Customer. [Incomp 1	7/11/2020 10:36		
	ADMIN	Please re	view Case 000	Open record "Please rev	view Case 000001 _ W		tern delivered to	Customer fincemulate
	ADMIN	Please re	view Case 000	action(s)]"	view Case 000004 - W	rong colour i	terri delivered to	customer. [incomplete

Figure 4-24

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 4-25*).

\leftarrow	All Open Cases									3
	imes You have 3 cases with incomp	olete actions. Ple	ease review de	tails in the SD Case Manager Notifications list. Show detail	5					
	,⊅ Search + New Manage	e Reports	💶 Open in E	ixcel					7	=
	Queue Code	Status	No. Ť	✓ Summary	Contact Name	Con				
	TICKETING SYSTEM	TK-LOG	000002	Bicycle for repair	Gary E. Altman III	Ad	① Details	Attachments (2)		
	NON CONFORMANCE	NC-LOG	000003	Goods damaged in Warehouse	Greg Chapman		Notes (2) +			-
	NON CONFORMANCE	NC-LOG	000004	Wrong Colour Item delivered to Customer						
	TICKETING SYSTEM	TK-ACT	000005	Broken Laptop			damaged in War			
	QUALITY CONTROL	QC-LOG	000006	Wrong glue used in product			17/11/2020 • AD!	/IN		
	TICKETING SYSTEM	TK-LOG	000007	Repair bicycle chain	Lori Kane	A. (e 000003 - Goods		
	CUSTOMER COMPLAINTS	CC-LOG	000008	Customer Overcharged			action(s)]	house. [Incomplete		
	CUSTOMER COMPLAINTS	CC-LOG	000009	Leg fell off table			17/11/2020 • AD!	/IN		

Figure 4-25





4.5.2 Executing Escalation Rules Manually

To execute Escalation Rules manually, from the **SD Case Manager Setup** in the **Process** menu group, select **Execute Escalation Rules** (*Figure 4-26*).

SD (Case Ma	anager	r Set	<i>∎</i> :up		
Home	About Related	More option	ns	'		
1 Exect	ute Escalation Rules	🛱 Product Ad	ctivation	🕀 Assi	sted Setup	✓ Manage Subscription:

4.5.3 Executing Escalation Rules Automatically

The SD Case Job Queue Entries are used to Execute Escalation Rules automatically (*Figure 4-27*).

\leftarrow			Ø	È	+					
	SD Case Manager Setup									
	Home About <u>Related</u> More options									
	📋 Queues 🕴 Priorities 🖙 Communication Methods 🖙 Email Inboxes									
	🖵 Case Templates	X Action Types	🗔 Email Ter	nplates		🖓 Job Queue Entries	04			
			-	-						



As a pre-requisite, you must have Job Queues already setup and running in Microsoft Dynamics 365 Business Central.

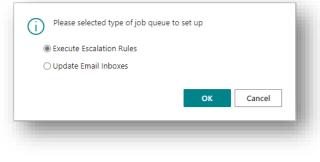
To set up a Job to Execute Escalation Rules in SD Case Manager:

- 1. Navigate to the **SD Case Manager Setup** Page. In the **General** menu group, choose **Job Queues**.
- 2. In the Job Queue Entries List, create a New Job Queue Entry.





3. You are prompted to select the type of Job Queue that you want to set up (*Figure 4-28*).





- 4. In the Job Queue Entry Card, enter a **Description**. Update the **Schedule** and **Recurrence** details in the Job Queue Entry Card as required.
- 5. Choose **OK** to save the Job Queue Entry.
- 6. 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.





4.6 Priorities

A Priority provides a means to visually organise or prioritise cases. When setting up a Priority, you select the Microsoft Dynamics 365 Business Central Style Property that you want 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.

The Priorities List (*Figure 4-29*). is accessed from the **SD Case Manager Setup Page.** From the menu, in the **Related** group, choose **Priorities**.

riorities: All	🕂 New 前 Delete 🛛 🚺 Open in Excel	
CODE †	DESCRIPTION	STYLE
HIGH	High Priority	Attention
LOW	Low Priority	Favorable
MEDIUM	Medium Priority	Ambiguous
STANDARD	Standard Priority	Standard

Figure 4-29

- **Code** A unique code to identify this Priority. You can specify the Priority for the case in the Case Card.
- **Description** A user defined description of the Priority.
- **Style** Select the style formatting that you want 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.





4.7 Communication Methods

When creating a case, you can specify the **Case Reported Method**, using the defined Communication Methods. You can also set the **Preferred Communication Method** for the Case Contacts, on the Case Card, using defined Communication Methods.

The Communication Methods List (*Figure 4-30*) is accessed from the **SD Case Manager Setup** by selecting **Communication Methods** from the **Related** menu group.

Search + Ne	w 🐯 Edit List	📋 Delete	🚺 Open in Exc	cel	⋎≣
CODE †				DESCRIPTION	
CALL				Call	
EMAIL				Email	
MEETIN	G			Meeting	
REMOTI				Remote Session	

Figure 4-30

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





4.8 Case Templates

The Case Templates List (*Figure 4-31*) is accessed from the **SD Case Manager Setup** by selecting **Case Templates** from the **Related** menu group.

∕⊃ s	earch 🕂 New	🞲 Edit List	<u>î</u> Dele	ete 🖍 Edit	🛕 View	Open in Excel
	Code †			Description		
\rightarrow	CC-TEMPLATE		:	Customer Com	plaint Templ	ate
	NC-TEMPLATE			Non Conforma	nce Templat	e
	QC-TEMPLATE			Quality Control	Template	

Figure 4-31

To access an existing Template from the Template List, from the menu select **View** or **Edit**. To create a new Template, from the menu select **New**.

The Case Template Card contains the following fields (Figure 4-32):

TEMPLATE WORK DATE: 28/01/2021	 (2) + 	۱. ۱	√ SAVED _⊅ ⊭
HELPDESK-TEMPLATE			
			0
General			Template Attachments \vee
Code · · · · · · · HELPDESK-TEMPLATE Disabled	••••••		FILE NAME
Description Ticket Helpdesk template			Helpdesk Ticket Logged Attachment.docx
Template Actions Manage		63	



- **Code** A unique user defined code to identify the Template.
- **Description** A user defined description of the Template.
- **Disabled** Select this checkbox to disable the Template.





Expand the **Template Actions** FastTab (*Figure 4-33*). 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 Code		Summary	Default Assignee	Log Due Date Changes	Due Date Rule	✓ Due Date Formula	Exclude Comment from Report	Attachments
>	ISSUE	. :	Log and Qualify				1D		0
	UPDATE		Update				2D		0
	INTERNAL		Internal						0
	SOLUTION		Solution				3D		0



- Action Type Select the Action Type Code for the Template Actions.
- **Summary** Enter a description for the Template Action.
- **Default Assignee** Enter the Dynamics 365 Business Central User that you want to assign the Action to on the Case Card.
- Log Due Date Changes Select this checkbox of you want to log changes made to the Action Due Dates on the Case Card. Users will be prompted to record the reason why the change was made to the due date on the Action.
- Due Date Rule Select a due date rule to automatically update due dates on the Case Actions as the Actions on the case are created or completed. This field is used in conjunction with the Due Date Formula field to update the due date on the Action. Options are
blank>, From Create, Last Action Due, Last Action Complete.
- **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.
- **Exclude Comment From Report** Choose this option to exclude the action comment from the Case Report.
- 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. When a Template Action is created on the case, the file will be attached to the Case Action. To access the **Template Actions Card**, select **Card** from the actions in the **Template Actions** FastTab (*Figure 4-34*).





EMPLATE WORK DATE: 28/01/2021) +	İ	√ SAVED	× ⁴
HELPDESK-TEMPLA	TE				
					0
General >				Template Attachments ~	
emplate Actions Manage			E	FILE NAME Helpdesk Ticket Logged Attachment.docx	
👫 New Line 🛛 🔭 Delete Line 🛛 🔳 Card 🛛 🔠	Attach file 1 New		ぷ	Hepdesk licket Logged Attachmentadora	
ACTION TYPE CODE SUMMARY	DEFAULT	DUE DATE FORMULA	ATTACHMEN		
CC-LOG Helpdesk ticket logged	200 C 100	1D	1		

Figure 4-34

In the Template Action Card, expand the **General** FastTab (*Figure 4-35*):

TEMPLATE ACTION WORK DATE: 28/01/2021					
Attach file Show Attached Actions Fewer options	0				
General	^ Template Attachments∨				
Action Type Code CC-LOG V Due Date Formula 1D Summary Helpdesk ticket logged Default Assignee	FILE NAME Helpdesk Ticket Logged Attachment.docx				
$\begin{tabular}{ c c c c c c c c c c c c c c c c c c c$					
Logged by:					
Received from: Date of Issue:					
Issue description:					



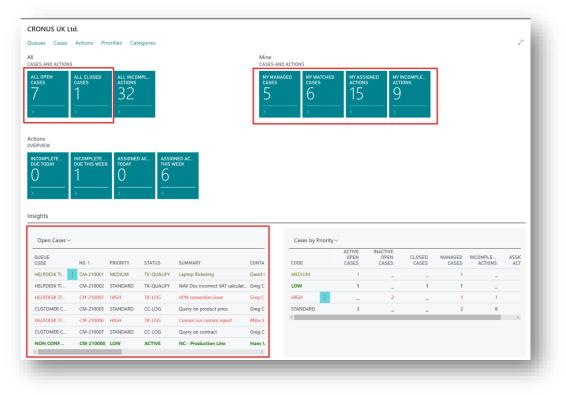
- Action Type Select the Action Type Code.
- **Due Date Formula** Enter the Due Date Formula for which you want SD Case Manager to use to determine the Due Date for the created Case Action. The Due Date Formula is applied to the Work Date to determine the Due Date for the Case Action created by the Template.
- **Comment** Enter the text that you want auto-created as a comment on the Case Action.





4.9 Cases

A Case provides a means of logging and tracking various issues and items. Cases can encompass various and multiple entities such as customer complaints, helpdesk issues, or internal and external company processes (*Figure 4-36*).





Cases can be logged both manually and/or by monitoring an email inbox to log the cases.

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.

To access an existing Case from the Case List, from menu, in the **Manage** group, select **View**, or **Edit**. To create a new Case, from the menu select **New**.





Expand the **General** FastTab (*Figure 4-37*):

CASE0106 · La	to Dolivory		\bigcirc			
CASEU IUU · La	të Delivery					
Home Reports Au	tomate \lor Fewer options					
🖲 View Comments	Assign To Me Y New Action	🖃 Email Case Contact 🛛 🖃 En	nail From Templates			
	,,					
General						
Queue Code	CUSTOMER COMPLAINTS	Summary	Late Delivery	Case Reported Metho	d · · EMAIL	~
Category	GENERAL V	Status	1CC-QUAL V			
	DELIVERIES ~	Priority	HIGH V			
Sub Category						



- No. This field uses the No. Series field specified on the SD Case Manager Setup.
- **Queue Code** Specifies the Queue that the case is in currently. Select a Queue from a list of existing Queues in SD Case Manager.
- **Category** This field specifies the case Category. Select from a list of existing 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. A Sub Category provides a means of further classifying cases.
- **Summary** Enter a user-defined description of the case.
- **Status** Select from a list of existing Statuses defined for the current Queue Code. 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. A Priority provides a means to organise or prioritise cases in SD Case Manager.
- **Case Reported Method** Select from a list of Communication Methods.





Expand the **Contacts** FastTab (*Figure 4-38*):

	Manage					
F New Line	<table-of-contents> Delete Line</table-of-contents>					Ŕ
Role	Source	No.	Name	Email	Phone No	Reporte
Manager	User					
Reporter	Contact	CT000008	lan Deberry	ian.deberry@contoso.com	555 444	Alpine
Watcher	Contact	CT000003	Trey Research	trey.research@contoso.com		Trey R

Figure 4-38

- Role Select the contact's role. Options are Manager, Reporter, or Watcher. A Case can only have one Manager Role and one Reporter Role.
- Source Choose where to select the contact's details from. Options are User, Contact or Manual. The Case Contact details can come from the User table, the Contact table or by manual input. The Source of the Manager role must be User.

Expand the **Actions** FastTab (*Figure 4-39*). This is a list of all the Actions created and logged against the Case.

×	Delete Line 🛛 💥 Nev	v Action	💿 View 🖉 Edit 🛛 🚹 Attach file	왇 Log Interaction					Ŕ
	Action Type Code		Summary	Assigned To	Due Date	Due Date Changes	Completed	Cost (LCY)	Exclude Comment from Report
÷	ISSUE	÷	Log and Qualify	AGRAY	03/05/2024	1			
	UPDATE		Update	AGRAY	03/05/2024	0			
	SOLUTION		Solution	AGRAY	06/05/2024	0			0

Figure 4-39

- Action Type Code Specifies the code for the Action Type.
- **Summary** A user defined description of the Action.
- Assigned To The User that the Action is assigned to.
- **Due Date** The date that the Action is due.
- **Due Date Changes** A flowfield count of any changes made by users to the Due Date on the Action.





- **Completed** Indicates if the Action is marked as completed.
- **Cost LCY** the Cost LCY that was specified on the Action.
- **Exclude Comment From Report** Choose this option to exclude the action comment from the Case Report.

To log a Case Action, select **New Action**. Existing Case Actions can be edited by choosing **Edit** (*Figure 4-40*).

×	Delete Line 🗱 New	Action	🔿 View 🖉 Edit Attach file	똳 Log Interaction					场
	Action Type Code		Summary	Assigned To	Due Date	Due Date Changes	Completed	Cost (LCY)	Exclude Comment from Report
\rightarrow	ISSUE	:	Log and Qualify		03/05/2024	1			
	UPDATE		Update		03/05/2024	0			
	SOLUTION		Solution		06/05/2024	0			

Figure 4-40

When you create or edit a Case Action, you can choose the actions below (Figure 4-41):

×	Delete Line 🗱 New	Action	👁 View 🖉 Edit Attach fil	e 😢 Log Interaction					Ń
	Action Type Code		Summary	Assigned To	Due Date	Due Date Changes	Completed	Cost (LCY)	Exclude Comment from Report
\rightarrow	ISSUE	1	Log and Qualify		03/05/2024	1			
	UPDATE		Update		03/05/2024	0			
	SOLUTION		Solution		06/05/2024	0			



- Attach a file to the Action by selecting **Attach File** and browsing to the relevant file(s).
- Log an Interaction for the Action by the **Log Interaction** action. To Log an interaction for the Action you must have an Interaction Group specified in the **Queue Card**.
- Link the Action to a specific record in Business Central by selecting the **New Link** menu group and then the required action to quickly link to either Customer, Item, Vendor, or several other pre-defined Business Central Transactions. You can also choose to create a custom link to a record by choosing Custom (*Figure 4-42*) and selecting the Business Central table that you want to link to the Action.





lome New L	ink State	More options		
🔆 Custom	🗊 Item	Duposted Sales Documents	╠ Posted Sales Credit Memo	🛅 Posted Purchase Invoice
🚨 Customer	🚨 Vendor	🛅 Posted Sales Invoice	🗋 Unposted Purchase Documents	🖺 Posted Purchase Credit Memo

Figure 4-42

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** menu group (*Figure 4-43*.

	WORK DATE: 28/01/2021	000		Ø	+	Ē	
CM-2	210003 · 70	000					
Process	State Show Attached	Actions	Fewer options				
$Process \lor$	State 🗸						
General	Completed						^
Action Type C	 Se-Open X Cancel 	~	Assign to me				
Summary	Cancer		Due Date				

The **Case Timeline** FactBox details updates in the case such as when the case was logged, emails received and sent that are related to the case, a change of case status, assigning an Action to a User, completing an Action.





4.10 Email Templates

The Email Templates List is accessed from the **SD Case Manager Setup** by selecting **Email Templates** from the **Related** menu group. Email Templates allow you to define an email subject and body with variable placeholders and are used to send an email directly from the case. To access an existing Template from the Template List, from the menu select **View** or **Edit**. To create a new Template, from the menu select **New** (*Figure 4-44*).

₲~ ,^ 🖪	+	- New Manage 🗈 Copy Template Mo	ore options		¢ 7	=
🖉 Edit 🛛 💿 View	Ĩ	Delete				si
Code †		Name	Case Status	Include Case Report	Show Detail On Case Report	
1CC-QUAL-A-STA	÷	1CC - Qualify Started - Notify Customer	1CC-QUAL			
1CC-QUAL-H-INT		1CC - Qualify Request - Internal for Assistance	1CC-QUAL			
1CC-QUAL-Z-END		1CC - Qualify Completed - Notify Customer	1CC-QUAL			

Figure 4-44

The Email Templates card contains the following fields (Figure 4-45):

🗈 Copy Template	More options				
General					
Code · · · · · · · · · · · · · · · · · · ·	1CC-QUAL-A-STA	Case Status 1CC-QUAL	\sim	Show Detail On C	ase R ·
Name ·····	1CC - Qualify Started - Notify Custo	Include Case Report			



- **Code** A unique user defined code to identify the Template.
- **Description** A user defined description of the Template.
- **Case Status** Select to filter the Templates shown in the Case Card to the current Case Status.
- Include Case Report Select to attach the Case Report to the email.
- Show Details on Case Report Select to display details on the attached report.





The subject of the email can include variable data from fields on the Case table. The body of the email can include variable data from fields on the Queue, Case and Case Action tables (*Figure 4-46*).

emplate Card	
ICC-QUAL-A-STA · 1CC - Qualify Started - Notify Customer	0
Copy Template More options	
Seneral >	
Subject	
Qualify Started - New Case: [[SDY CSM Case:No.]], [[SDY CSM Case:Summary]], [[SDY CSM Case:ReporterName]]	
B I U S >> So I H1 H2 I I I x₂ x² A M I T _x Normal ≎ Normal SDY CSM Case Action ≎	Arial
Hi [[SDY CSM Case:ReporterName]],	
Actions Taken:	
We have logged a new case per the details below.	
Next Action: We will move onto qualify this case. We aim to do this normally within 4 business hours.	
We may need to contact you for more details.	
Case Info: [[SDY CSM Case:No.]] - [[SDY CSM Case:Summary]] Priority: [[SDY CSM Case:Priority]]	
Phoney. [[SDT CSW Case.Phoney]]	
Client Info: [[SDY CSM Case:ReporterCompanyName]] - [[SDY CSM Case:ReporterCompanyN	

Figure 4-46

- **Subject** Defines the text that you want to display in the Email Subject. Choosing the ellipses button prompts the user to select the Placeholder Source from fields in the Case table. A page opens listing the field names that can be used in the Subject.
- **Body** Defines the text that you want to display in the Email Body. Choose the Placeholders drop down lists to add a place holder to include data from a field. The Placeholder Source is from fields in the Queue, Case and Case Action tables.





4.11 Email Inboxes

The **Email Inboxes** is accessed from the **SD Case Manager Setup** by selecting **Email Inboxes** from the **Related** menu group. Here you setup the email inboxes that you will monitor and scan for the inbound emails used to log and update a case. To access an existing Email Inbox from the Email Inboxes List, from the menu select **View** or **Edit**. To create a new Email Inbox, from the menu select **New** (*Figure 4-47*).

Øb∨ ,₽			Search For Pending En	nails 📲 Archive 📘 API		
Code 1		Description	Email Address	Queue Code	Enabled	Subject Line Parsi
COMPLAINTS		Customer Complaints Inbox	-	CUSTOMER COMPLAINTS	4	CASE
TICKETS	:	Ticket Helpdesk Inbox		TICKETING HELPDESK		CASE

Figure 4-47

The Templates List contains the following fields (Figure 4-48):

COMPLAI	NTS			
Search For Pending Er	nails 🗌 API Logs 🛛 Automate	 ✓ Fewer options 		
General				
Code	COMPLAINTS	Subject Line Parsing	CASE	
Description	Customer Complaints Inbox	Pending Emails		1
Email Address	complaints@example.com	Archived Emails		7
Queue Code	CUSTOMER COMPLAINTS \sim	API Logs		4
Add Email Attachme		Last Polled At(UTC)	01/07/2024 16:56	Ē
Enabled · · · · · · · · · · · · · ·		Show Current UTC Datet	ime	



- Code A unique user defined code to identify the Email Inbox.
- Description A user defined description of the Email Inbox.
- Email Address The address of the inbox that you want to monitor.
- **Queue Code** Specify the Queue that you want to log the cases in for cases that are created by email stripping.





- Add Email Attachments Switch this option on if you want to attach email attachments to the case.
- **Enabled** Select this checkbox to start monitoring the inbox.
- **Subject Line Parsing** Enter a phrase that must exist in the email subject line used to identify the emails that are related to existing cases. The search phrase in the subject line parsing used to find cases in the monitored Email Inboxes is a case sensitive search phrase. Punctuation characters such as commas and full stops are ignored in the Subject Line Parsing phrase.
- **Pending Emails** A count of the emails in the inbox that are yet to be either used to create a case or forced to archive if not relating to a case.
- Archived Emails A count of the emails in the inbox that have been archived.
- API Logs A count of the API calls made to the Azure Portal App Email API.
- Last Polled At (UTC) The UTC date/time that the inbox was last polled. On setup you can set this field to the date/time from when you want to begin scanning your inbox. You can also amend this date at any stage.

In the Conditions FastTab you can set up conditions to exclude certain emails from appearing in the Email Inbox Pending list *(Figure 4-49)*. The Value field is not case sensitive when searching the inbox.

	Condition		Function	Value	
	Exclude if a phrase in email subject		does not contain	Case	
>	Exclude if originating from a specific sender	÷	email address	agray@simplyd.ie	

Figure 4-49





4.12 Email Inbox Pending

The Email Inbox Pending shows the emails in the monitored inbox that are can be used to create a case or linked to an existing case. To scan the Email Inbox for new emails, choose the **Update** action. You can set up job queues in the SD Case Manager Job Queue Entries to scan the Email Inboxes.

To create a case from an email, choose the Create a New Case action (Figure 4-50).

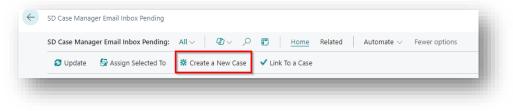


Figure 4-50

The Create a New Case Card opens (Figure 4-51).

Queue Code TICKETING HELPDESK	\sim
Summary Late Delivery	
Priority CRITICAL	~
Manager · · · · · · · · · · · · · · · · · · ·	
Reported By	
Reported By	
From Email	
Reporter Contact No. CT000008	\sim
Reporter Contact Name Ian Deberry	
Create Contact	
ок	Cancel



- **Queue Code** Defaults to the Queue specified on the Email Inbox.
- Summary Defaults to the email subject.
- **Priority** Choose a case priority.
- **Manager** Defaults to the Email Inbox Admin field for the Queue chosen in Queue Code.





Reporter Contact No – If the From Email address exists for one of your existing contacts in the Contact table, the Reporter Contact No is set to your contact number. Otherwise, you can easily create a new contact by choosing the Create Contact action on the Create a New Case Card.

Choose **OK** to create the new case (*Figure 4-52*). The case is created, and the email is moved to the Email Inbox Archive.

Dueue Code	
-	
Summary	Late Delivery
Priority	CRITICAL
Manager · · · · · · · · · · · · · · · · · · ·	
Reported By	
Reported By	lan
rom Email	
Reporter Contact No.	CT000008 ~
Reporter Contact Name	lan Deberry
Create Contact	
	OK Cancel

Figure 4-52

When the inboxes are scanned, SD Case Manager will attempt to link incoming emails to existing cases based on the value in the Subject Line Parsing field on the Email Inbox card. Emails related to existing cases are matched and automatically moved to the Email Archive table.

The search phrase in the subject line parsing used to find cases in the monitored Email Inboxes is a case sensitive search phrase. Punctuation characters such as commas and full stops are ignored in the Subject Line Parsing phrase.

To manually link an email to a case from an email choose the Link To a Case action (*Figure 4-53*).

SD Case Manag	ger Email Inbox Pending:	All ∼ <i>Q</i> D ∼ ,⊃	E Home	Related Automate \smallsetminus	Fewer options
😂 Update	🛃 Assign Selected To	🛠 Create a New Case	🗸 Link To a Case	1	

Figure 4-53





5 Surfacing the New Case action and the Linked Cases FactBox to Pages

We have extended some standard pages in Business Central to surface the New Case action and the Linked Cases FactBox. These pages include the Customer Card, Vendor Card, Item Card, Posted Sales Invoice, Posted Purchase Credit Memo, Posted Purchase Invoice, and the Posted Sales Credit Memo.

To add the New Case action and the Linked Cases FactBox to other pages, you use the SD Case Manager Extension Setup. Select the page Object ID, choose to add the New Case Action, the Linked Cases FactBox and the position of the FactBox on the page. Choose **Publish App** to create and install an extension app in your environment which will surface these items on your chosen pages (*Figure 5-1*).

			ension Setup				
🗐 Publish App	_	-	agement III Extension Deployment Status More options				
General						Show m	
Publisher			Starting ID			5010	
Version · · · · ·	1.0.0.1	11	Prefix CSM				
Page Extensio	ons <mark>}</mark> ™ New Object ID ↑	Line Pelete Line	FactBox Position	New Case Action	Case FactBox	Disable	
Page Extensio			FactBox Position				
Page Extensio	Object ID †	Object Name		Action	FactBox	Y Disable	
Page Extensio	Object ID 1 27	Object Name Vendor List	Add First	Action	FactBox	Disable	
Page Extensio	Object ID † 27 31	Object Name Vendor List Item List	Add First Add First	Action	FactBox	Disable	
Page Extensio	Object ID † 27 31 51	Object Name Vendor List Item List Purchase Invoice	Add First Add First Add First	Action	FactBox	Disable	

Figure 5-1

You can also use the **SD Case Manager Extension** wizard to add the New Case action and the Linked Cases FactBox to your pages. The wizard can be accessed from the **SD Case Manager Setup Card**.





6 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 6-1*).

							٩	Q	Ø	?	
TELL ME WHAT YOU WANT TO DO		2	\times								
extension			×				2				
Go to Pages and Tasks			_								
> Extension Management	Administration		П	+ Sales Credit Memo Tasks	> Sales > Reports	> History					
Didn't find what you were looking for? Try exploring					, nepono						
4											

Figure 6-1

- 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 6-2).

🔎 Search Details 🛛 <u>M</u>	anage 🛛 Open in Excel Actions	Fewer options	\ ≡
👫 Install 🕃 Uninstall	Configure 🕒 Download Source	🚯 Learn More 🛛 🗮 Refresh	Ŕ
Description	Name †	Version	

Figure 6-2



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Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.



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