



Dynamics
Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Case Manager

Release: D365 BC V21+

Revision: December 2022

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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.

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.

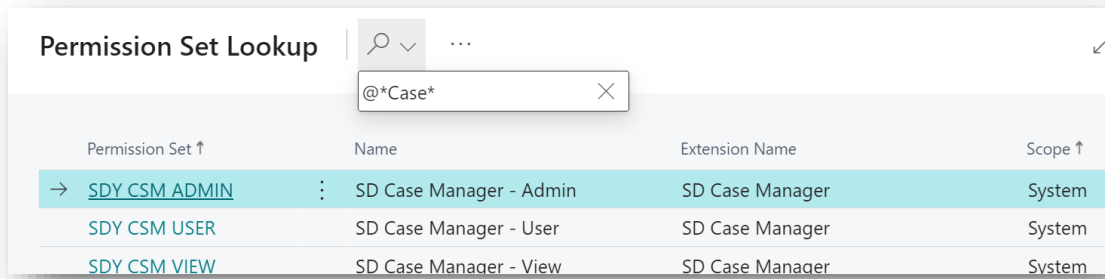
Using Templates in SD Case Manager, you can define your list of standard steps and create Template Case Actions and attach Template files for recurring Case Actions. When a Case is created within a Queue that has a defined Template, or, when a Category with a defined Template is added to a Case, these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

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 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: SDY CSM ADMIN, SD CSM USER and SD CSM VIEW (*Figure 3-1*).



Permission Set ↑	Name	Extension Name	Scope ↑
→ SDY CSM ADMIN	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

Figure 3-1

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

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).

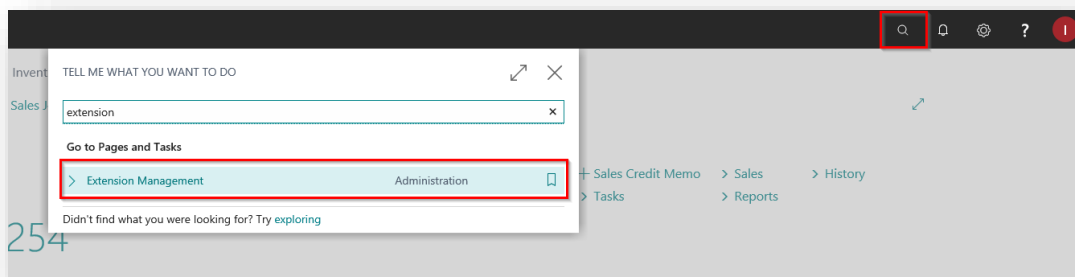


Figure 4-1

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).

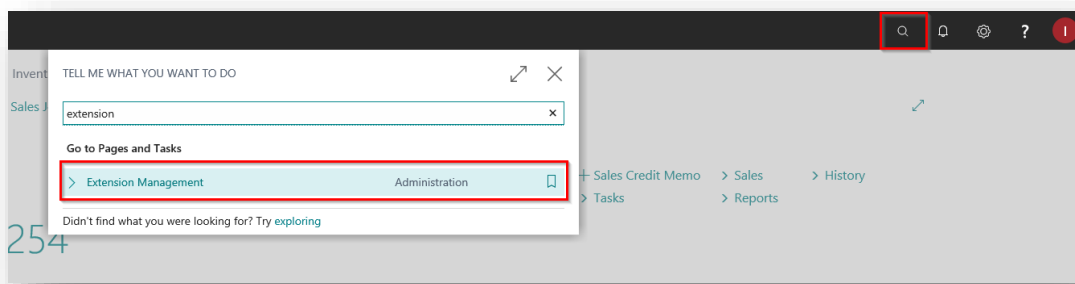
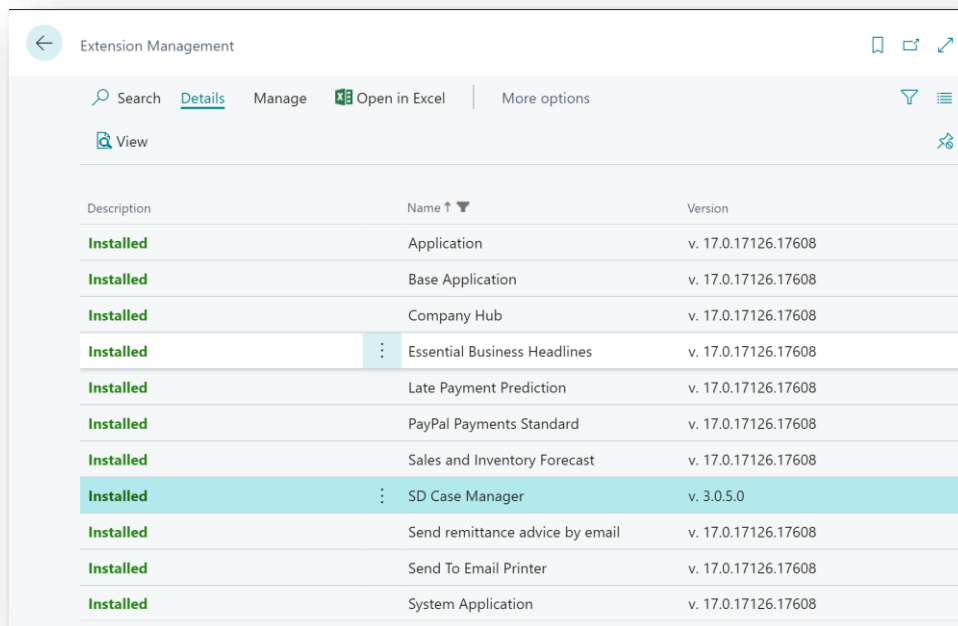


Figure 4-2

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



Description	Name	Version
Installed	Application	v. 17.0.17126.17608
Installed	Base Application	v. 17.0.17126.17608
Installed	Company Hub	v. 17.0.17126.17608
Installed	Essential Business Headlines	v. 17.0.17126.17608
Installed	Late Payment Prediction	v. 17.0.17126.17608
Installed	PayPal Payments Standard	v. 17.0.17126.17608
Installed	Sales and Inventory Forecast	v. 17.0.17126.17608
Installed	SD Case Manager	v. 3.0.5.0
Installed	Send remittance advice by email	v. 17.0.17126.17608
Installed	Send To Email Printer	v. 17.0.17126.17608
Installed	System Application	v. 17.0.17126.17608

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).

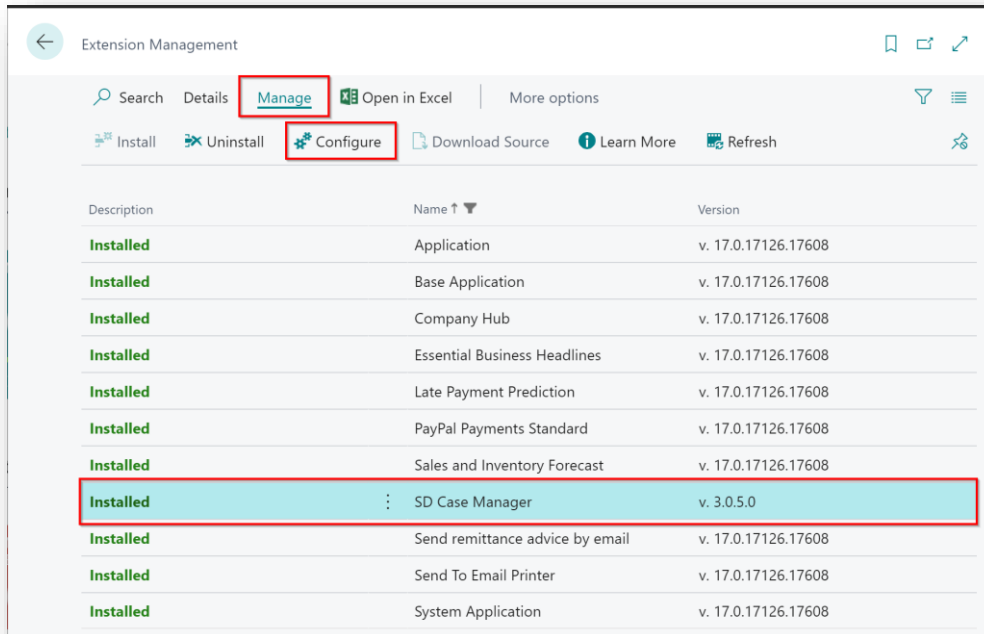


Figure 4-4

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

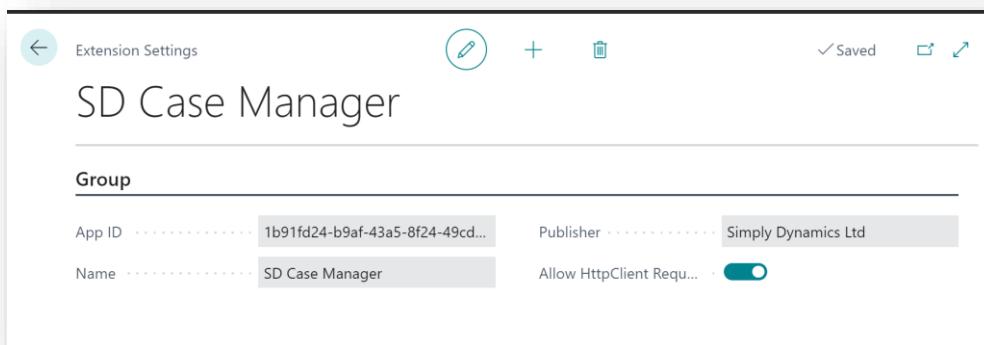


Figure 4-5

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).

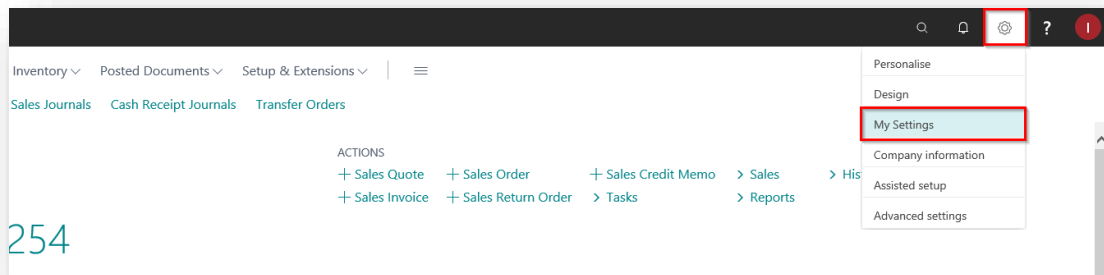


Figure 4-6

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

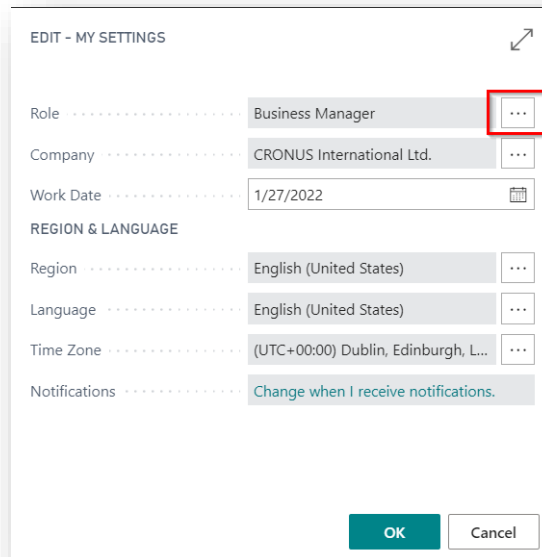


Figure 4-7

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

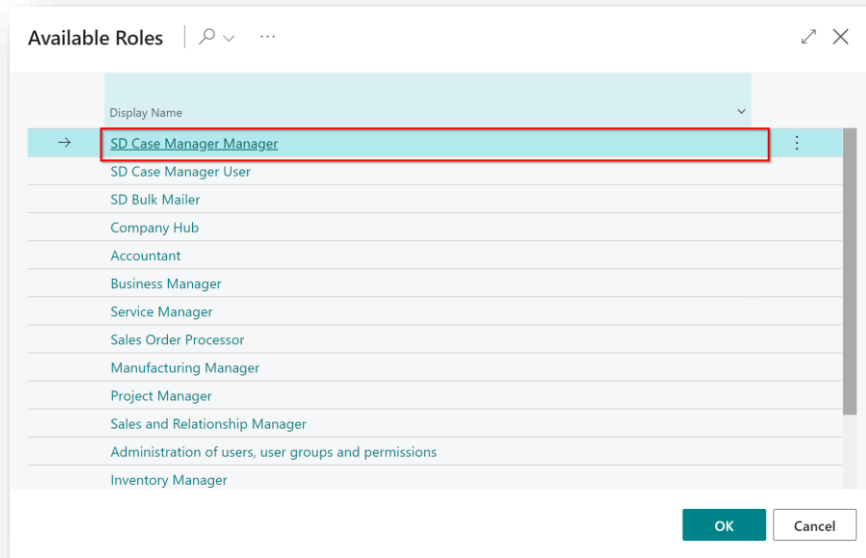


Figure 4-8

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).

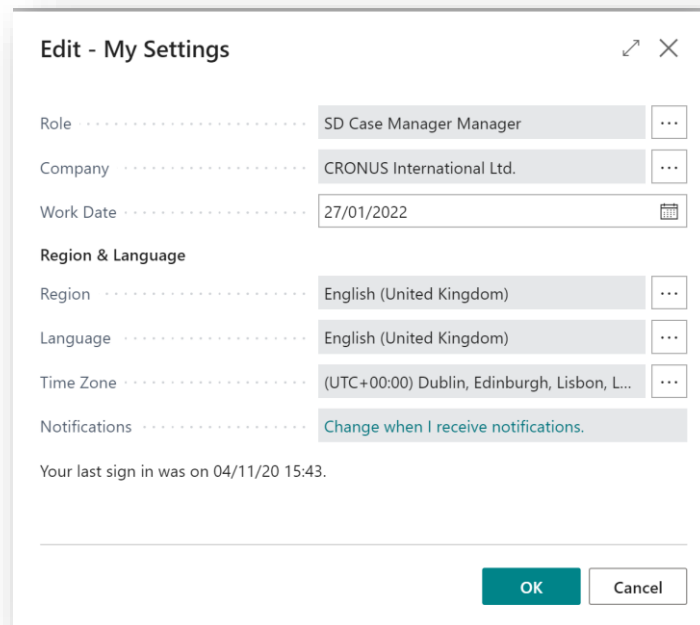


Figure 4-9

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*).

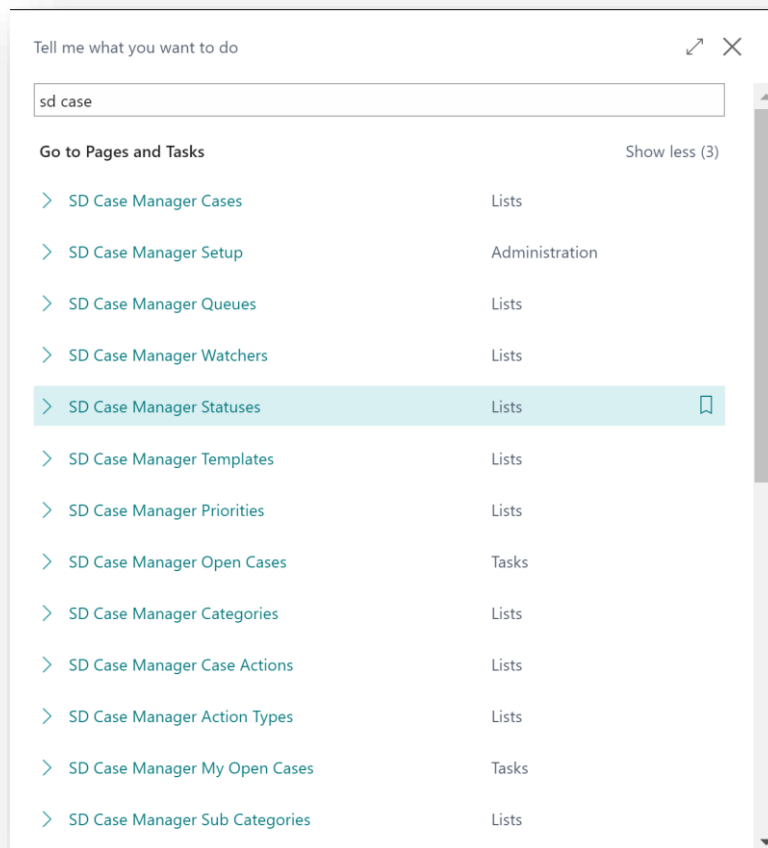


Figure 4-10

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** card.
2. When the **SD Case Manager Setup** opens, you will be prompted that “Your SD Case Manager license needs to be validated”. Choose **Yes** (Figure 4-11).

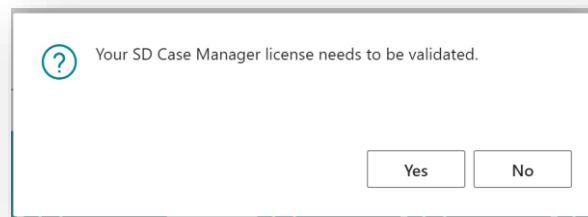


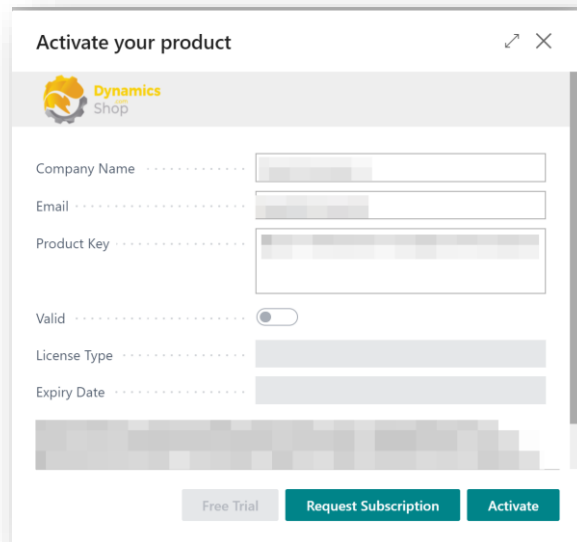
Figure 4-11

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

4.4.1 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:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. 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** (Figure 4-12).



Activate your product

Dynamics Shop

Company Name

Email

Product Key

Valid

License Type

Expiry Date

Free Trial Request Subscription Activate

Figure 4-12

4. 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.

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, in the **Activate your Product** page:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial** (Figure 4-13).

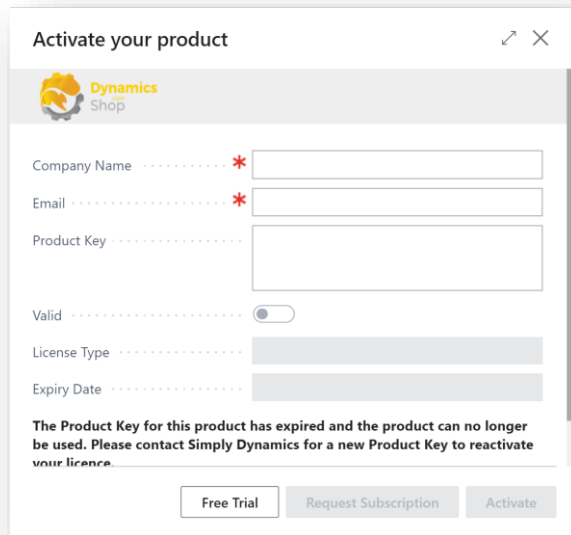


Figure 4-13

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (Figure 4-14).

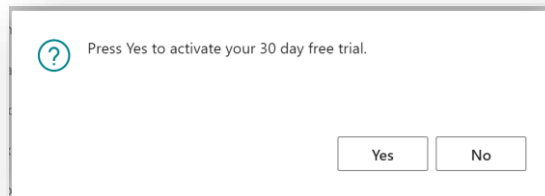
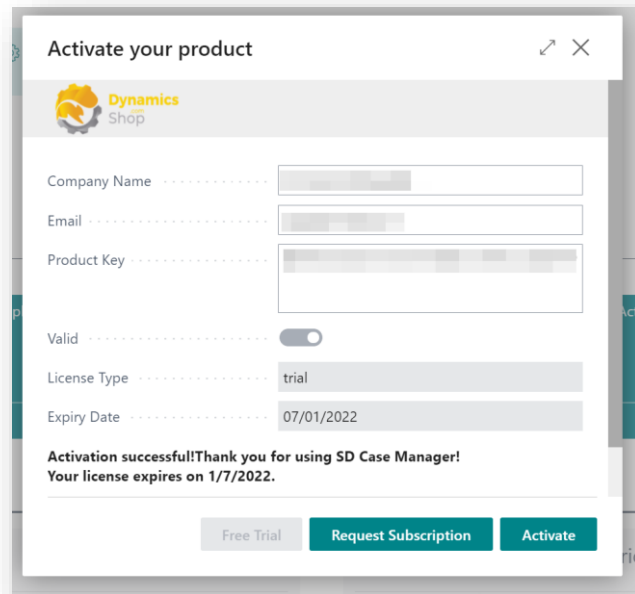


Figure 4-14

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).



Activate your product

Dynamics Shop

Company Name

Email

Product Key

Valid

License Type trial

Expiry Date 07/01/2022

Activation successful! Thank you for using SD Case Manager!
Your license expires on 1/7/2022.

Free Trial Request Subscription Activate

Figure 4-15

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

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*).

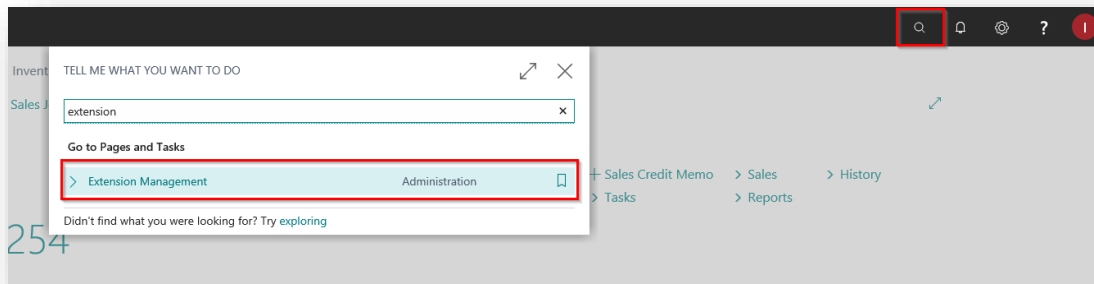


Figure 5-1

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*).

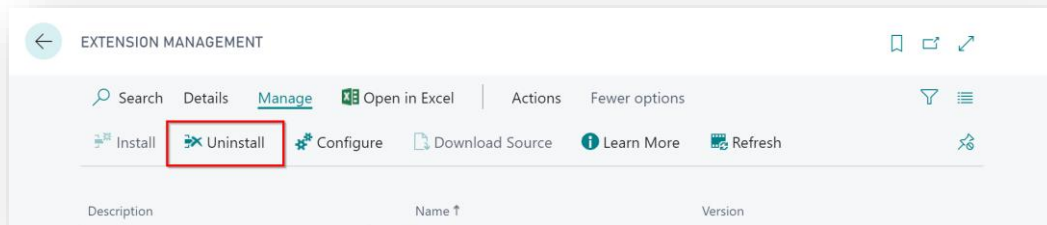


Figure 5-2

6 Upgrading from previous versions of SD Case Manager

6.1 Upgrading from v3.0.5 to v3.0.6

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.

6.2 Upgrading from earlier versions to v4.0.0 or above

Version 4.0.0 of SD Case Manager contains significant changes to the structure of the Case Manager, Case Reporter and Case Watchers on the Case Card. The Watchers table has been renamed to Case Contacts and a Case Contact can now have a Role of Manager, Reporter or Watcher. The Case Contact details can come from the User Setup, the Contact List or by Manual Entry.

Upgrade code in Version 4.0.0 and above copies existing data to this new table structure.

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 **Home** group, and then **Assisted Setup** (*Figure 7-1*).

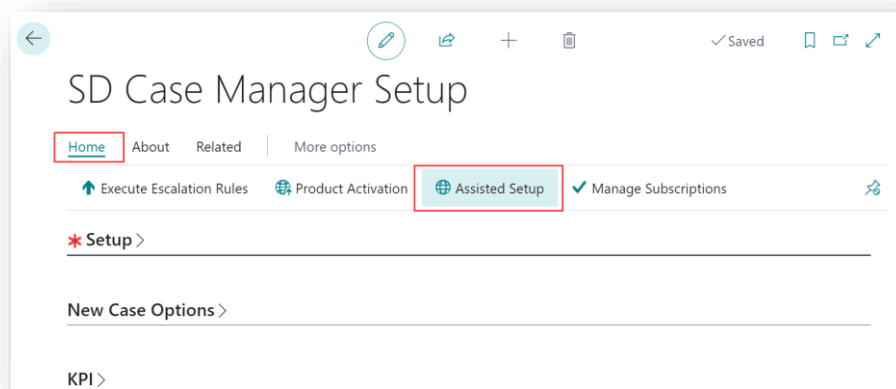


Figure 7-1

2. You are prompted that “Importing setup will modify 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*).

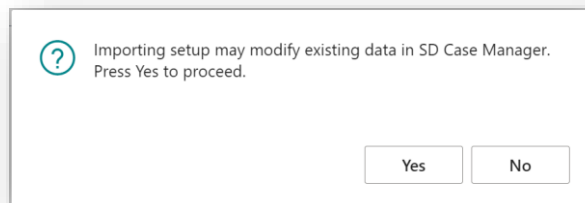


Figure 7-2

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

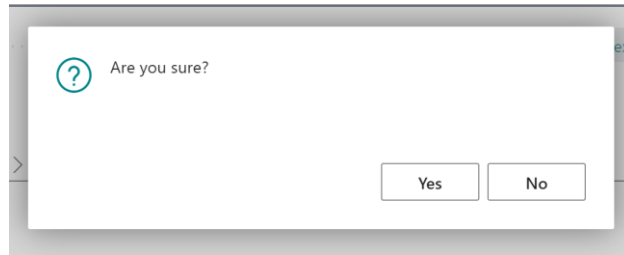


Figure 7-3

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

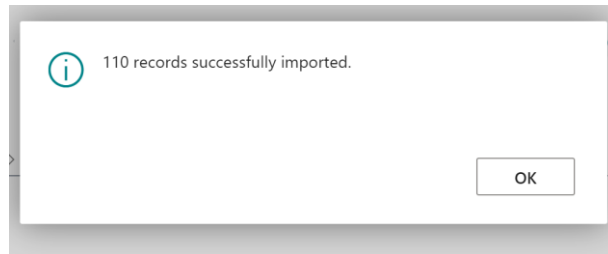


Figure 7-4

8 Using SD Case Manager

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

8.1 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 8-1).

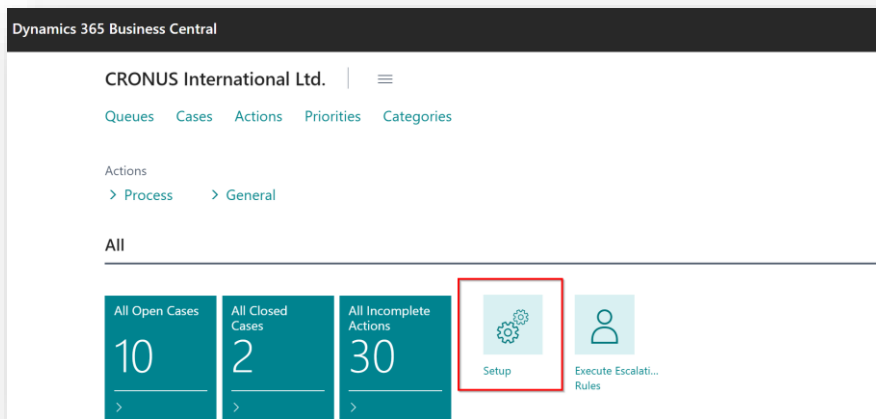


Figure 8-1

In the **SD Case Manager Setup** page, the **General** FastTab contains the following fields (Figure 8-2):

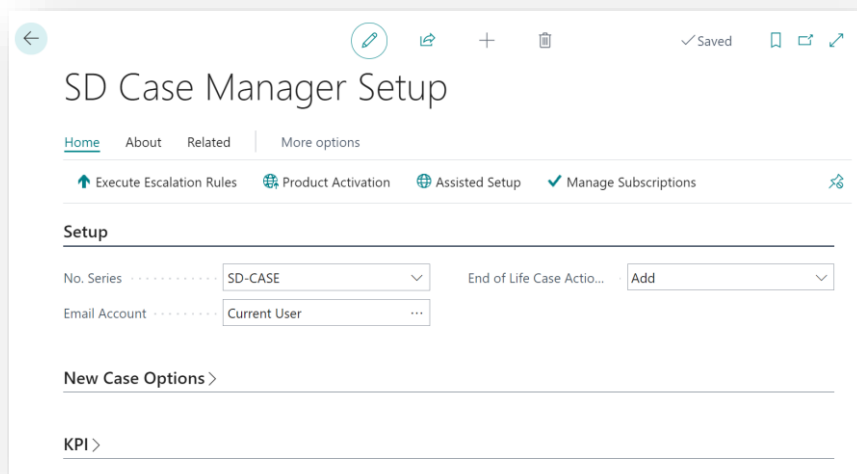


Figure 8-2

- **No. Series** – Select the No. Series to use when creating Cases in SD Case Manager.
- **Email Account** – This field defines which Email Address to use as the From and Reply-To Address for Emails sent from SD Case Manager.
- **End of Life Record Link Handling** – Choose how to handle record links for end-of-life transactions on Case Actions. This option allows you to specify how Case Manager will update record links on Case Actions for transactions such as Quotes, Orders, Invoices and Credit Memos when the documents are posted. Options are <blank>, Modify, Add, Delete.
 - **<blank>** - 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.

Expand the **New Case Options** FastTab (Figure 8-3):

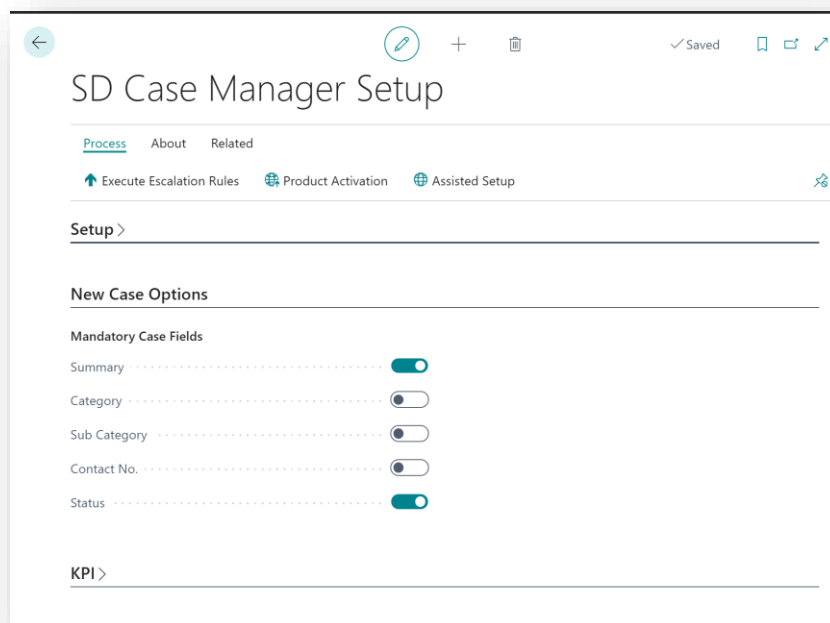


Figure 8-3

- **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 8-4*):

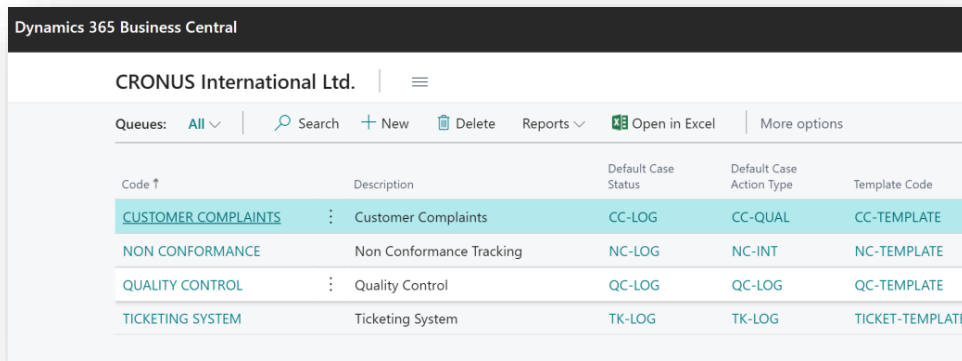


KPI	
Queues	4
Case Templates	13
Priorities	4
Action Types	22
Communication Meth... ..	6
Job Queue Entries	4

Figure 8-4

8.2 Queues

A Queue in SD Case Manager is a group of or stream of Cases in SD Case Manager (Figure 8-5).



Code ↑	Description	Default Case Status	Default Case Action Type	Template Code
CUSTOMER COMPLAINTS	Customer Complaints	CC-LOG	CC-QUAL	CC-TEMPLATE
NON CONFORMANCE	Non Conformance Tracking	NC-LOG	NC-INT	NC-TEMPLATE
QUALITY CONTROL	Quality Control	QC-LOG	QC-LOG	QC-TEMPLATE
TICKETING SYSTEM	Ticketing System	TK-LOG	TK-LOG	TICKET-TEMPLATE

Figure 8-5

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.

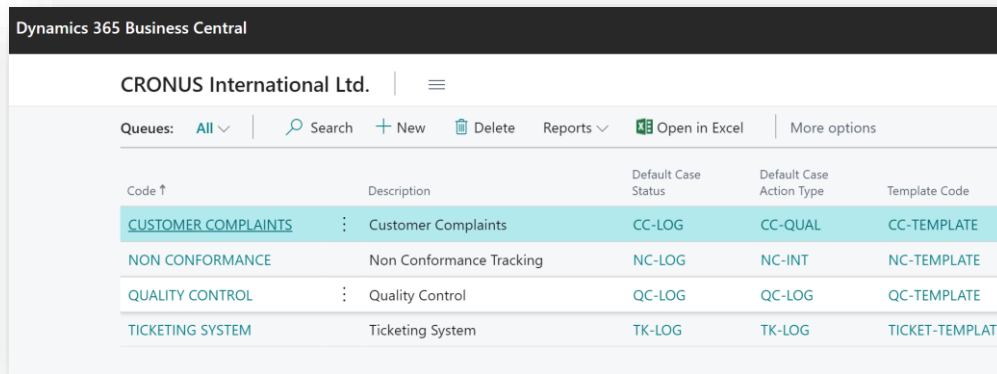
With each Queue you can set up Statuses and assign and update the Statuses on the Case as it progresses through the Queue's workflow. Cases can move between Queues.

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.

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**).

The Queues List (*Figure 8-6*) is accessed from the **Case Manager Setup Page** and is a list of all the Queues currently setup in SD Case Manager. From the menu, in the **Related** group, choose **Queues**. You can also access the Queues List by searching the Tell Me.

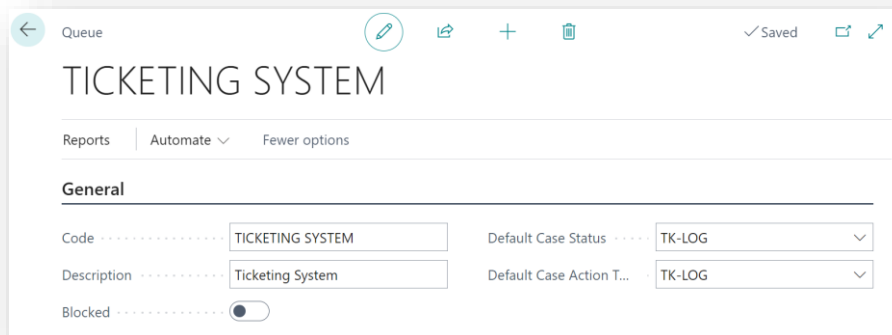


Code ↑	Description	Default Case Status	Default Case Action Type	Template Code
CUSTOMER COMPLAINTS	Customer Complaints	CC-LOG	CC-QUAL	CC-TEMPLATE
NON CONFORMANCE	Non Conformance Tracking	NC-LOG	NC-INT	NC-TEMPLATE
QUALITY CONTROL	Quality Control	QC-LOG	QC-LOG	QC-TEMPLATE
TICKETING SYSTEM	Ticketing System	TK-LOG	TK-LOG	TICKET-TEMPLATE

Figure 8-6

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

The Queue Card contains the following fields in the **General** FastTab (*Figure 8-7*):



Queue

TICKETING SYSTEM

Reports Automate Fewer options

General

Code: TICKETING SYSTEM Default Case Status: TK-LOG

Description: Ticketing System Default Case Action T...: TK-LOG

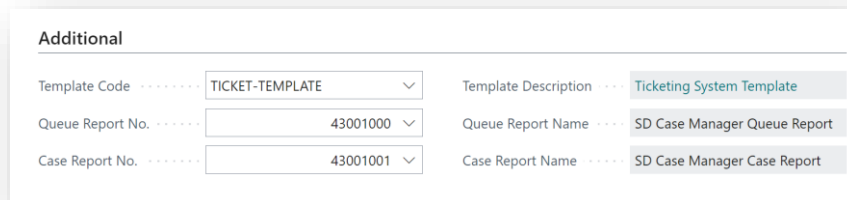
Blocked:

Figure 8-7

- **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 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 8-8*):

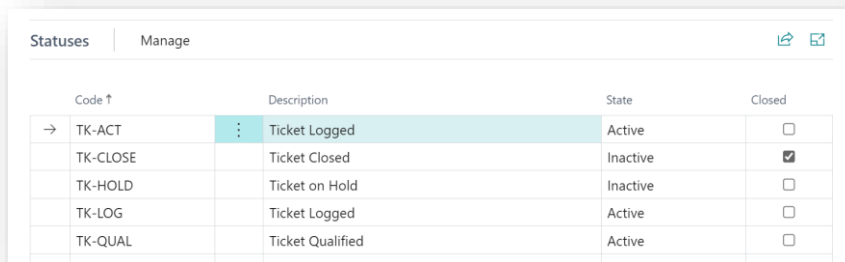


Additional			
Template Code	TICKET-TEMPLATE	Template Description	Ticketing System Template
Queue Report No.	43001000	Queue Report Name	SD Case Manager Queue Report
Case Report No.	43001001	Case Report Name	SD Case Manager Case Report

Figure 8-8

- **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 365 Business Central 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 or from the Queue Card.
- **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 365 Business Central 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 or from the Queue Card.
- **Case Report Name** - The name of the report selected in Case Report No.

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



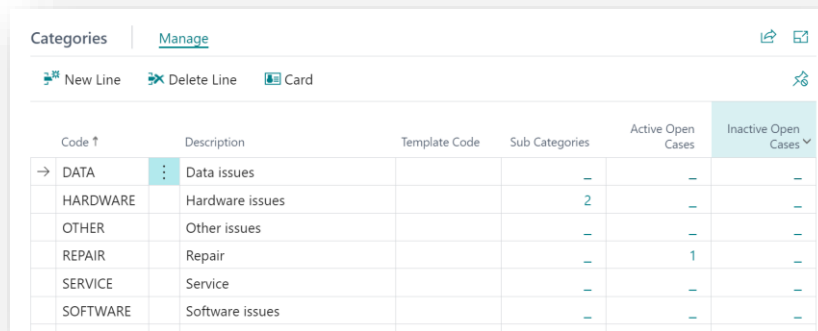
Code ↑	Description	State	Closed
→ TK-ACT	Ticket Logged	Active	<input type="checkbox"/>
TK-CLOSE	Ticket Closed	Inactive	<input checked="" type="checkbox"/>
TK-HOLD	Ticket on Hold	Inactive	<input type="checkbox"/>
TK-LOG	Ticket Logged	Active	<input type="checkbox"/>
TK-QUAL	Ticket Qualified	Active	<input type="checkbox"/>

Figure 8-9

This is a list of the Statuses defined for the Queue. 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. 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 can be updated in the Case Card (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.
 - **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.
- **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. When the Case Status on the Case is defined as Closed, you cannot create Case Actions for the Case.

Expand the **Categories** FastTab (*Figure 8-10*):



Code ↑	Description	Template Code	Sub Categories	Active Open Cases	Inactive Open Cases ↓
→ DATA	Data issues		-	-	-
HARDWARE	Hardware issues		2	-	-
OTHER	Other issues		-	-	-
REPAIR	Repair		-	1	-
SERVICE	Service		-	-	-
SOFTWARE	Software issues		-	-	-

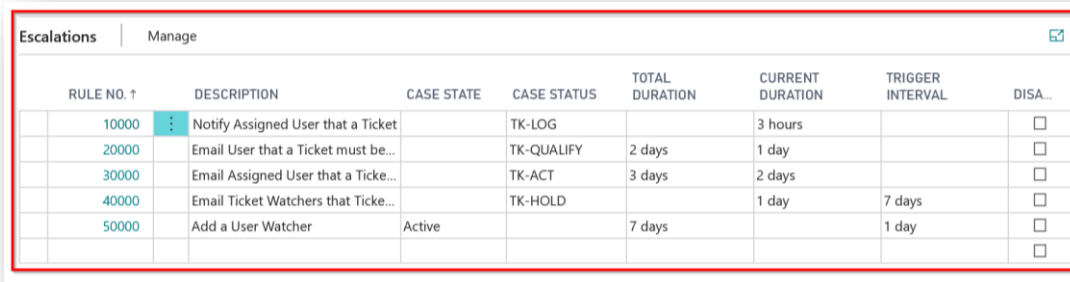
Figure 8-10

The Categories List displays a list of Categories available for the Queue and provides a means of classifying Cases within Queues.

- **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**).
- **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.
- **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 **Categories**.

Expand the **Escalations** FastTab (Figure 8-11):



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		<input type="checkbox"/>
20000	Email User that a Ticket must be...		TK-QUALIFY	2 days	1 day		<input type="checkbox"/>
30000	Email Assigned User that a Ticke...		TK-ACT	3 days	2 days		<input type="checkbox"/>
40000	Email Ticket Watchers that Ticke...		TK-HOLD		1 day	7 days	<input type="checkbox"/>
50000	Add a User Watcher	Active		7 days		1 day	<input type="checkbox"/>

Figure 8-11

This is a list of Escalation Rules to apply to Cases within the Queue.

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.

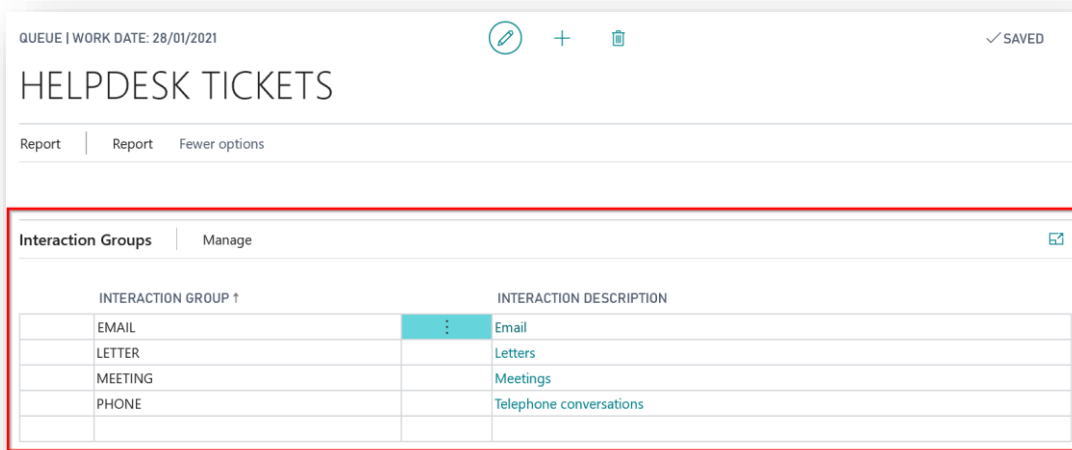
For information on how to run the Escalation Rules see the sections on **Executing Escalation Rules Manually** and **Executing Escalation Rules Automatically**.

- **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 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 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 8-12):



INTERACTION GROUP ↑	INTERACTION DESCRIPTION
EMAIL	Email
LETTER	Letters
MEETING	Meetings
PHONE	Telephone conversations

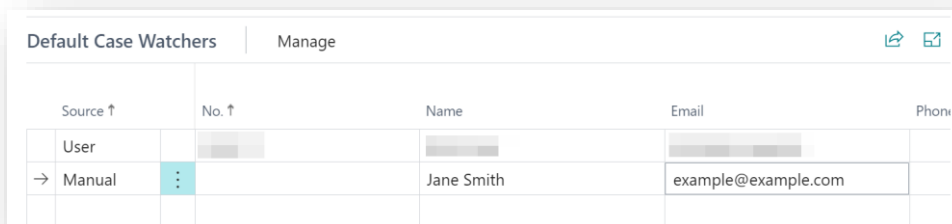
Figure 8-12

This is a list of the Interaction Groups you can choose to use 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** (Figure 8-13):



Source ↑	No. ↑	Name	Email	Phone
User				
→ Manual	⋮	Jane Smith	example@example.com	

Figure 8-13

This is a list of the default Watchers to auto-assign to Cases created in this Queue. 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**, **Manual**.
 - **User** - The Watcher is selected from the list of Business Central Users.
 - **Manual**- The Watcher details are entered manually.

8.3 Categories

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 8-14*).

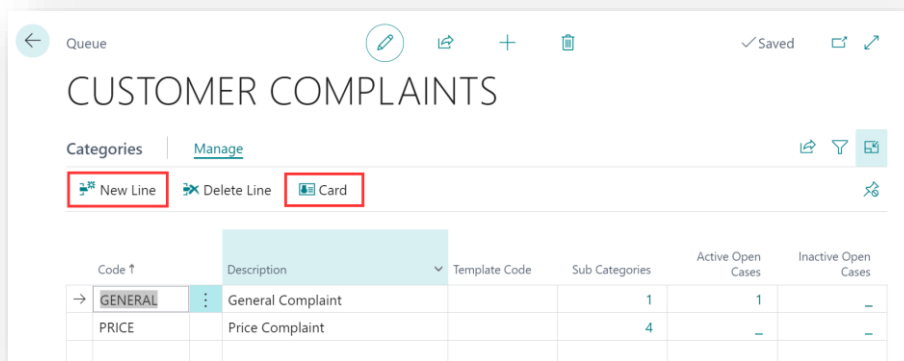


Figure 8-14

Categories and Sub-Categories are used in SD Case Manager as a means of classifying and grouping Cases within Queues

Expand the **General** FastTab (*Figure 8-15*):

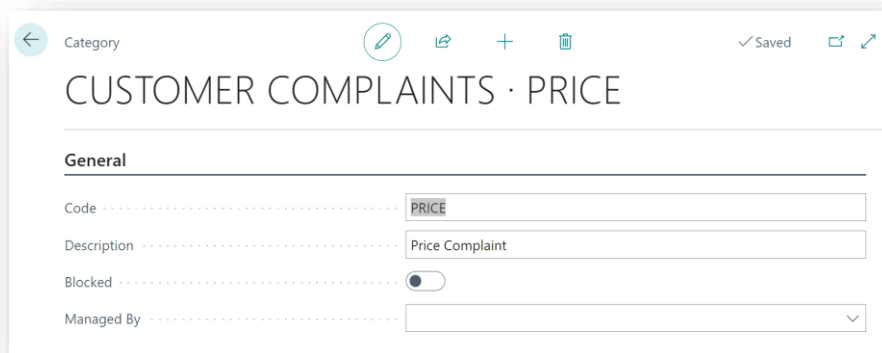


Figure 8-15

- **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 8-16):

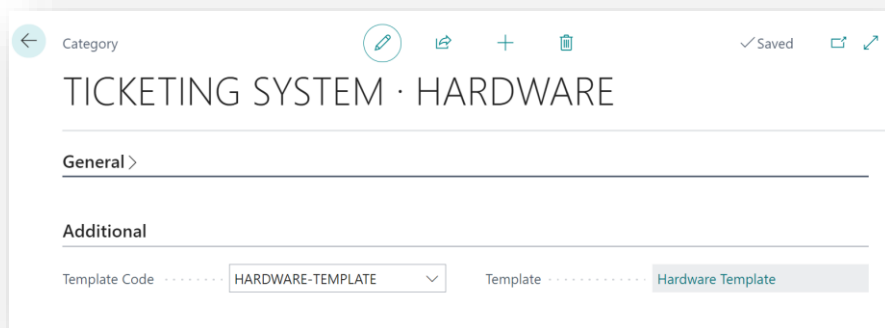
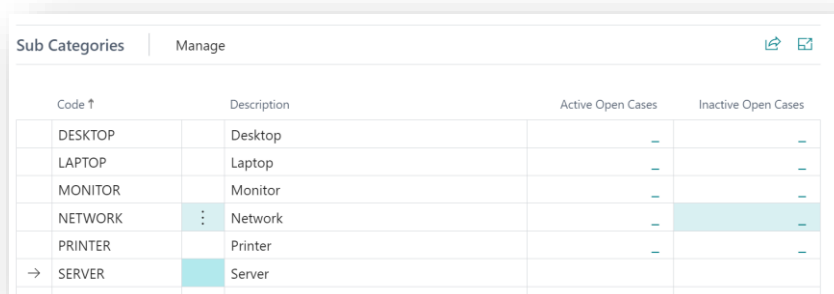


Figure 8-16

- **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. (Please see the sections on **Cases** and **Case Templates**).
- **Template** - Displays the user defined description of the Template Code.

Expand the **Sub Categories** FastTab (Figure 8-17):



Code ↑	Description	Active Open Cases	Inactive Open Cases
DESKTOP	Desktop	-	-
LAPTOP	Laptop	-	-
MONITOR	Monitor	-	-
NETWORK	Network	-	-
PRINTER	Printer	-	-
→ SERVER	Server		

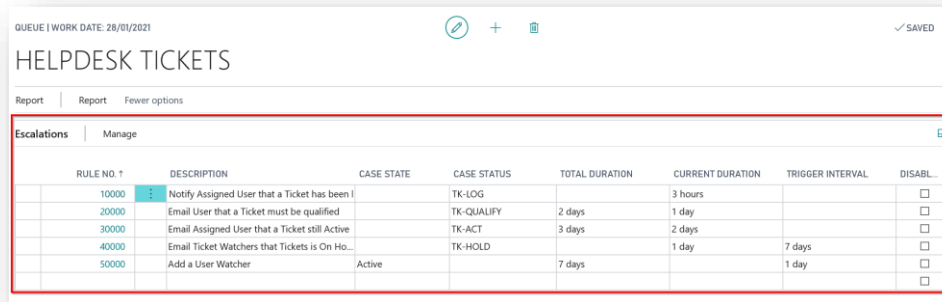
Figure 8-17

The Sub Categories List, displays a list of Sub Categories within the Category.

- **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.
- **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.

8.4 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 (*Figure 8-18*).

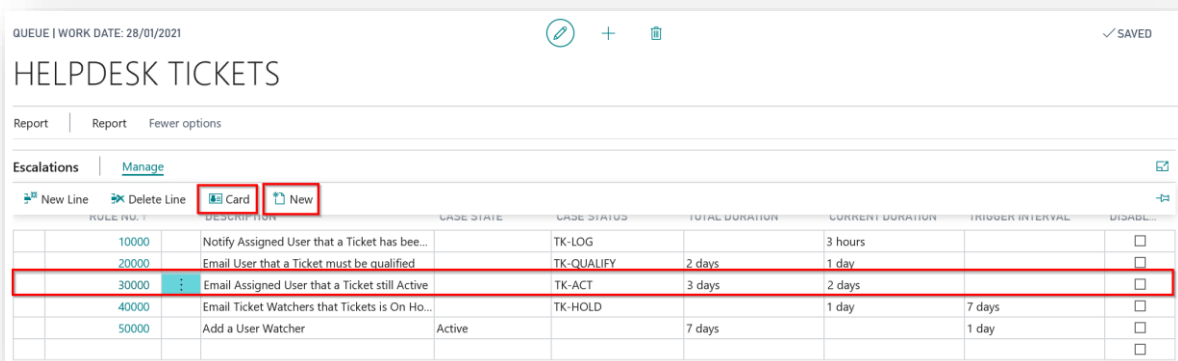


RULE NO. †	DESCRIPTION	CASE STATE	CASE STATUS	TOTAL DURATION	CURRENT DURATION	TRIGGER INTERVAL	DISABL...
10000	Notify Assigned User that a Ticket has been		TK-LOG		3 hours		<input type="checkbox"/>
20000	Email User that a Ticket must be qualified		TK-QUALIFY	2 days	1 day		<input type="checkbox"/>
30000	Email Assigned User that a Ticket still Active		TK-ACT	3 days	2 days		<input type="checkbox"/>
40000	Email Ticket Watchers that Tickets is On Ho...		TK-HOLD		1 day	7 days	<input type="checkbox"/>
50000	Add a User Watcher	Active		7 days		1 day	<input type="checkbox"/>

Figure 8-18

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.

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 8-19*).



RULE NO. †	DESCRIPTION	CASE STATE	CASE STATUS	TOTAL DURATION	CURRENT DURATION	TRIGGER INTERVAL	DISABL...
10000	Notify Assigned User that a Ticket has bee...		TK-LOG		3 hours		<input type="checkbox"/>
20000	Email User that a Ticket must be qualified		TK-QUALIFY	2 days	1 day		<input type="checkbox"/>
30000	Email Assigned User that a Ticket still Active		TK-ACT	3 days	2 days		<input type="checkbox"/>
40000	Email Ticket Watchers that Tickets is On Ho...		TK-HOLD		1 day	7 days	<input type="checkbox"/>
50000	Add a User Watcher	Active		7 days		1 day	<input type="checkbox"/>

Figure 8-19

In the Escalation Card, expand the **General** FastTab Group (Figure 8-20):

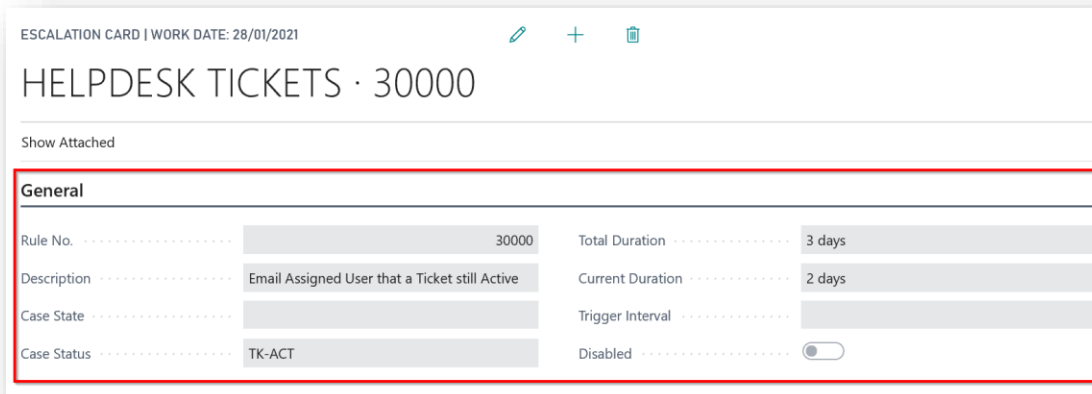


Figure 8-20

- **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 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 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 8-21):

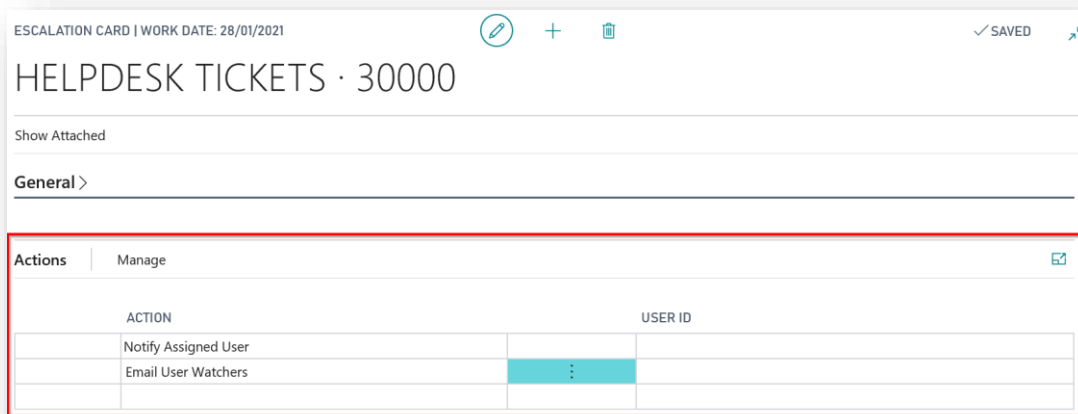


Figure 8-21

This is a list of the actions that you want to happen for those Cases within the Queue when the Escalations are run.

- **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.

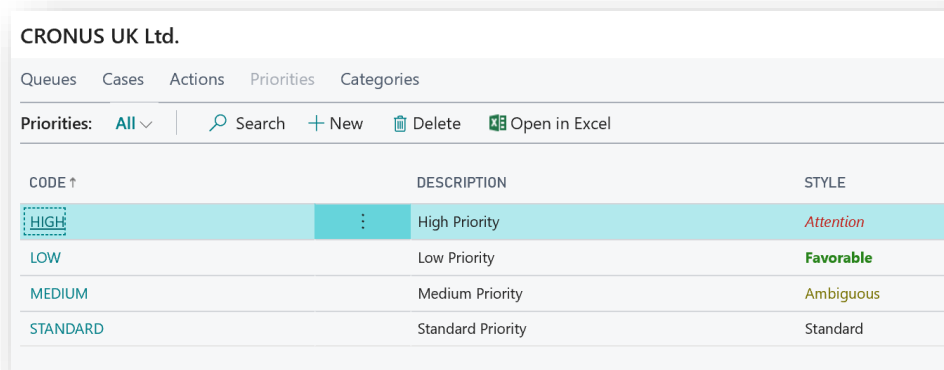
For information on how to run the Escalation Rules see the section on **Executing Escalation Rules Manually** and **Executing Escalation Rules Automatically**.

8.5 Priorities

The Priorities List (*Figure 8-22*). is accessed from the **SD Case Manager Setup Page**. From the menu, in the **Related** group, choose **Priorities**.

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



CODE ↑	DESCRIPTION	STYLE
HIGH	High Priority	Attention
LOW	Low Priority	Favorable
MEDIUM	Medium Priority	Ambiguous
STANDARD	Standard Priority	Standard

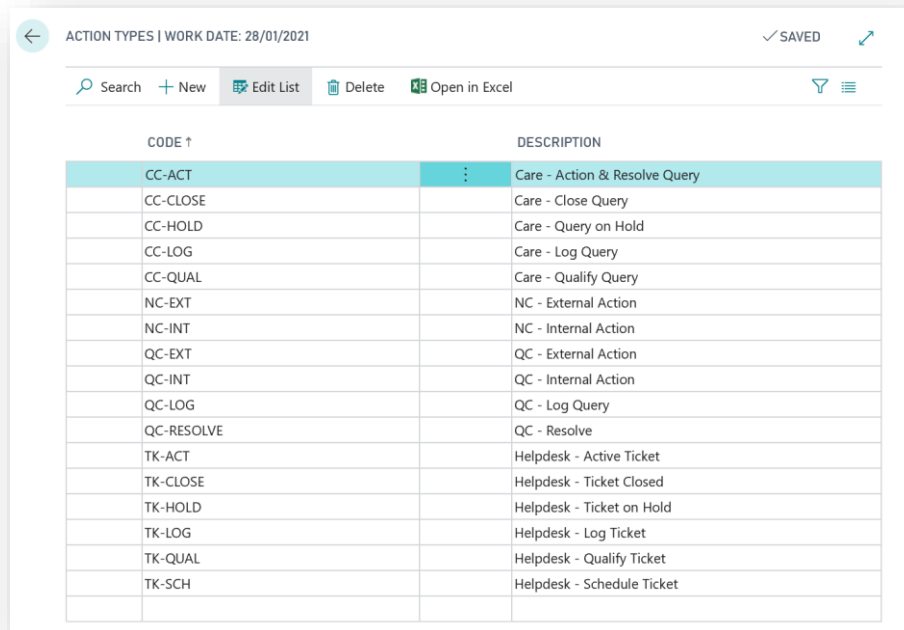
Figure 8-22

- **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**).
- **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, in the **Manage** group, select **View**, or **Edit**. To create a new Priority, from menu, select **New**.

8.6 Action Types

The Action Types List (*Figure 8-23*) is accessed from the **SD Case Manager Setup Page** by selecting **Action Types** in the **Related** menu group.



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

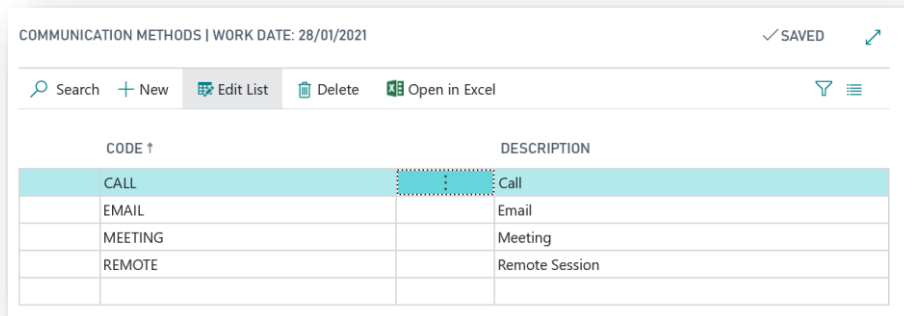
Figure 8-23

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.

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

8.7 Communication Methods

The Communication Methods List (*Figure 8-24*) is accessed from the **SD Case Manager Setup Page** by selecting **Communication Methods** from the **Related** menu group. The Communication Methods List is a list of all the Communication Methods currently setup in SD Case Manager



CODE ↑	DESCRIPTION
CALL	Call
EMAIL	Email
MEETING	Meeting
REMOTE	Remote Session

Figure 8-24

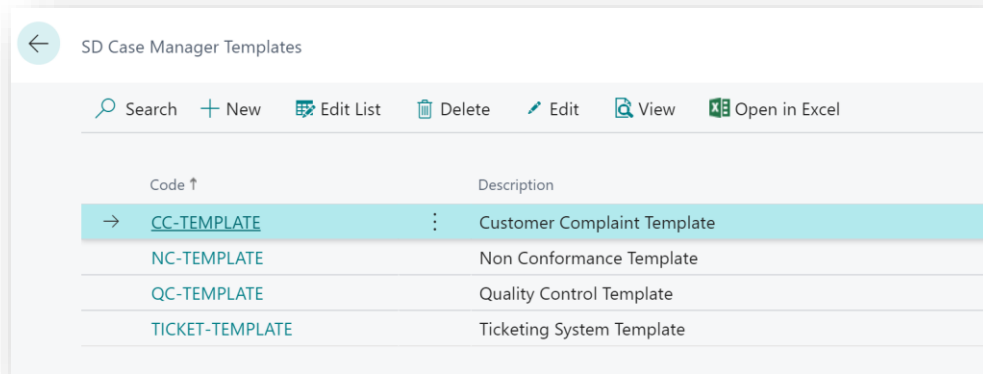
This is a list of Communication Methods defined in SD Case Manager.

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

8.8 Case Templates

The Case Templates List is accessed from the **SD Case Manager Setup Page** by selecting **Case Templates** from the **Related** menu group. The Case Templates List is a list of the Templates defined in SD Case Manager (*Figure 8-25*).



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

Figure 8-25

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.

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

Expand the **General** FastTab (*Figure 8-26*):

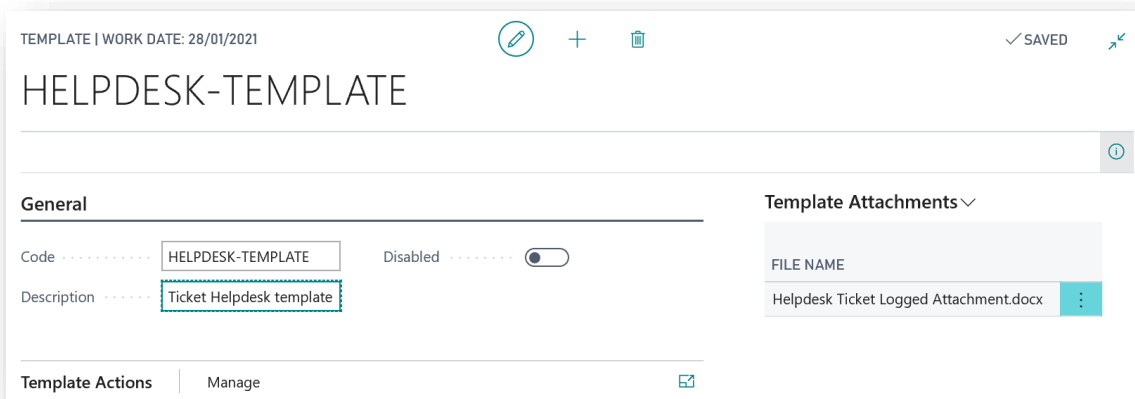


Figure 8-26

- **Code** - A unique user defined Code to identify the Template. Defining a Template Code allows you to link a Template to the Queue and/or 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 8-27*):

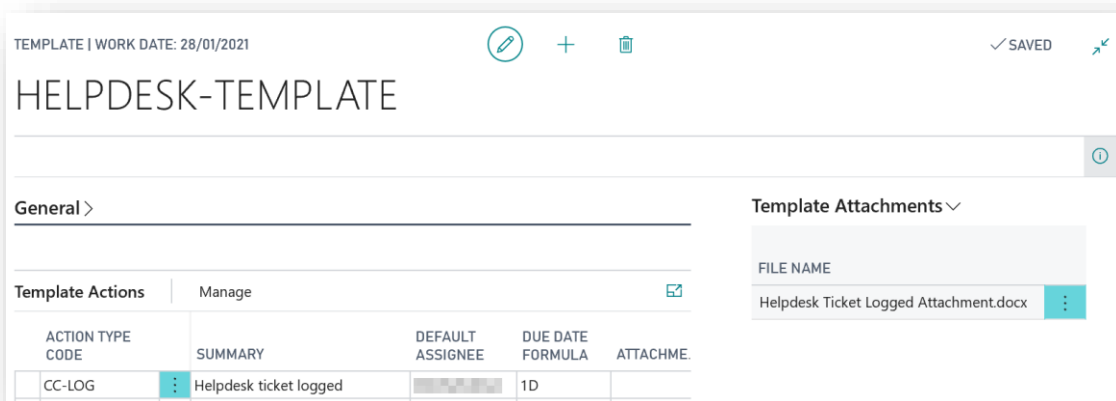


Figure 8-27

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 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.
- **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, if it exists, will be attached to the Case Action (*Figure 8-28*).

To access the **Template Actions Card**, select **Card** from the actions in the **Template Actions** FastTab (*Figure 8-28*).

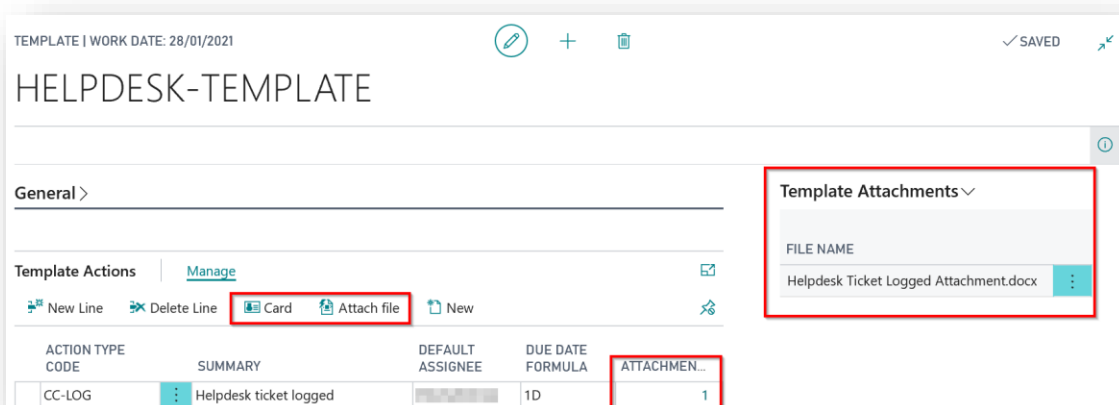


Figure 8-28

In the Template Action Card, expand the **General** FastTab (*Figure 8-29*):

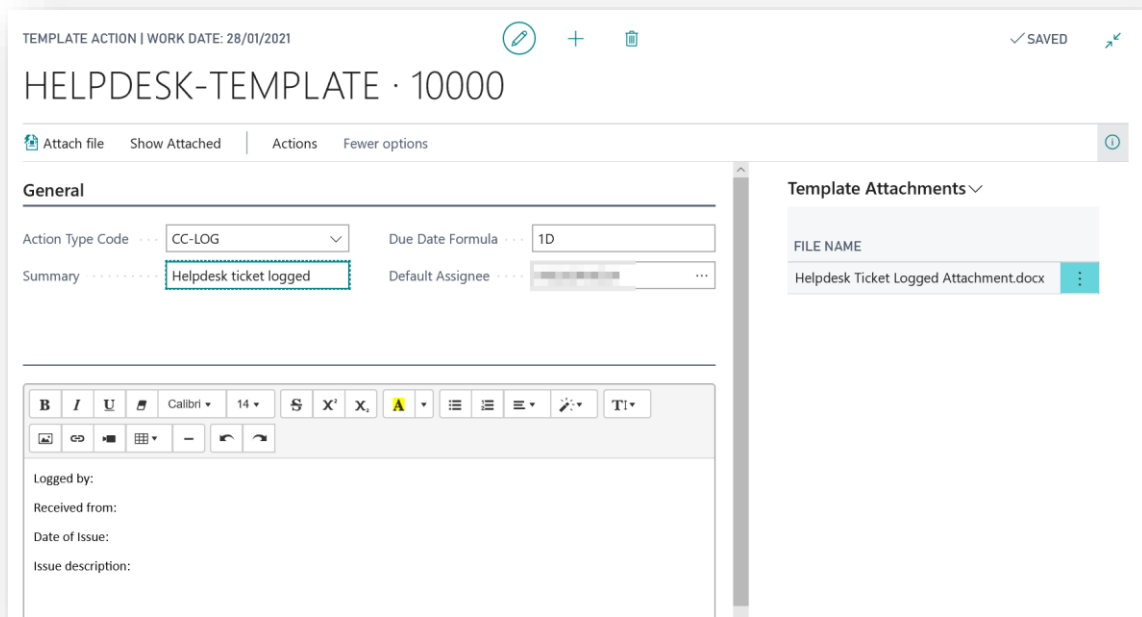


Figure 8-29

- **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.

8.9 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 8-30*).

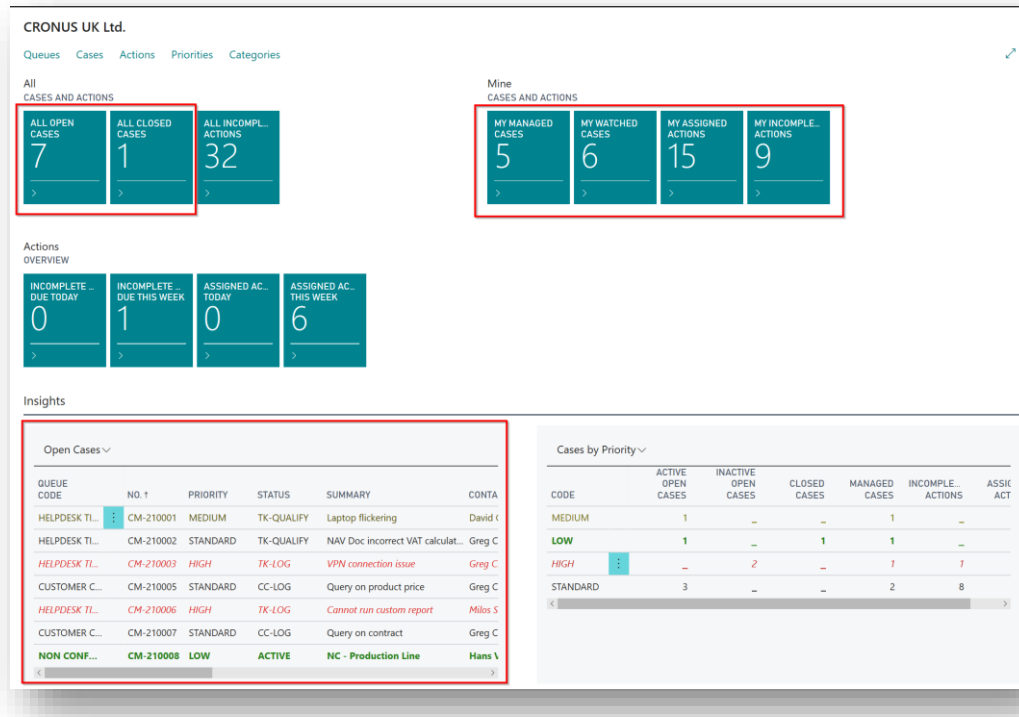


Figure 8-30

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.

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

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 8-31):

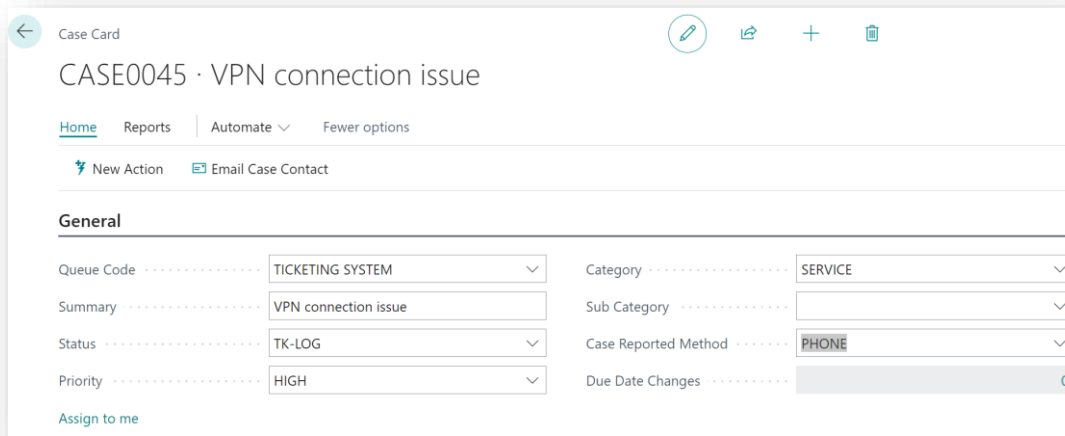
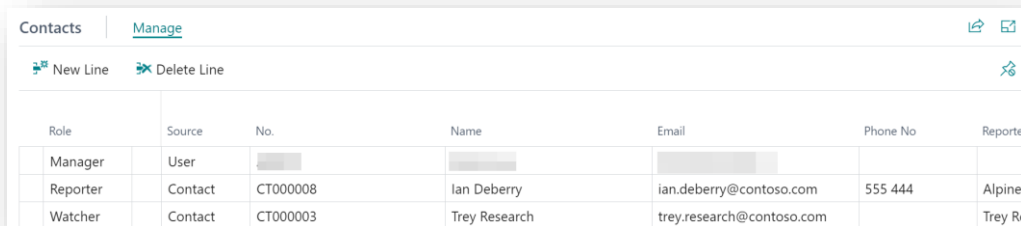


Figure 8-31

- **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** – 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** – 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. 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 Lists 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.
- **Case Reported Method** – Select from a list of Communication Methods. (Please see the section on **Communication Methods**).
- **Due Date Changes** – A flowfield count of the number of times that the due date on a Case Action has been changed by a user. This tracking of due date changes is switched on in the Case Template card for the individual Actions.
- **Assign to me** – Choose this action to quickly create a Manager Contact for your Business Central User ID, assigning you as the Manager of the Case.

Expand the **Contacts** FastTab (*Figure 8-32*):



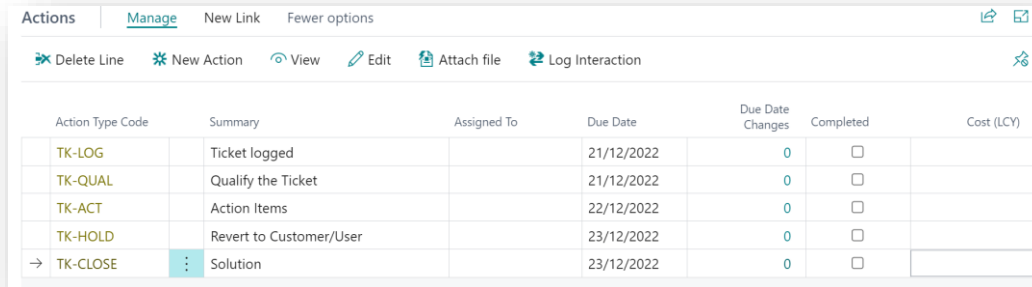
Role	Source	No.	Name	Email	Phone No	Reporter
Manager	User					
Reporter	Contact	CT000008	Ian Deberry	ian.deberry@contoso.com	555 444	Alpine
Watcher	Contact	CT000003	Trey Research	trey.research@contoso.com		Trey Re

Figure 8-32

- **Role** – Select the contact’s role. Options are **Manager**, **Reporter**, or **Watcher**. A Case can only have one case contact defined as a Manager and one case contact defined as a Reporter.
- **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.

If the Contact has a **Role** of **Manager**, then the **Source** must be **User**.

Expand the **Actions** FastTab (*Figure 8-33*). This is a list of all the Actions created and logged against the Case.

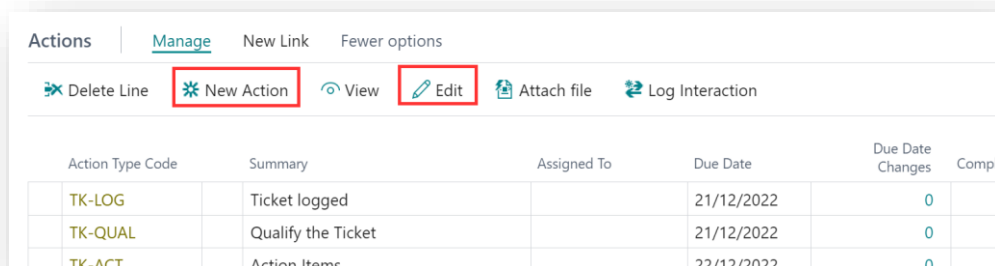


Action Type Code	Summary	Assigned To	Due Date	Due Date Changes	Completed	Cost (LCY)
TK-LOG	Ticket logged		21/12/2022	0	<input type="checkbox"/>	
TK-QUAL	Qualify the Ticket		21/12/2022	0	<input type="checkbox"/>	
TK-ACT	Action Items		22/12/2022	0	<input type="checkbox"/>	
TK-HOLD	Revert to Customer/User		23/12/2022	0	<input type="checkbox"/>	
→ TK-CLOSE	Solution		23/12/2022	0	<input type="checkbox"/>	

Figure 8-33

- **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.
- **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

To log a Case Action, from menu in the Case Card, in the **Process** group, select **New Action** (*Figure 8-34*). Existing Case Actions can be Edited by choosing the **Edit** action from the actions in the Action List.



Action Type Code	Summary	Assigned To	Due Date	Due Date Changes	Comple
TK-LOG	Ticket logged		21/12/2022	0	
TK-QUAL	Qualify the Ticket		21/12/2022	0	
TK-ACT	Action Items		22/12/2022	0	

Figure 8-34

- **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 Business Central User who is Assigned to the Case. Select from a list of existing Business Central 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 8-35*):

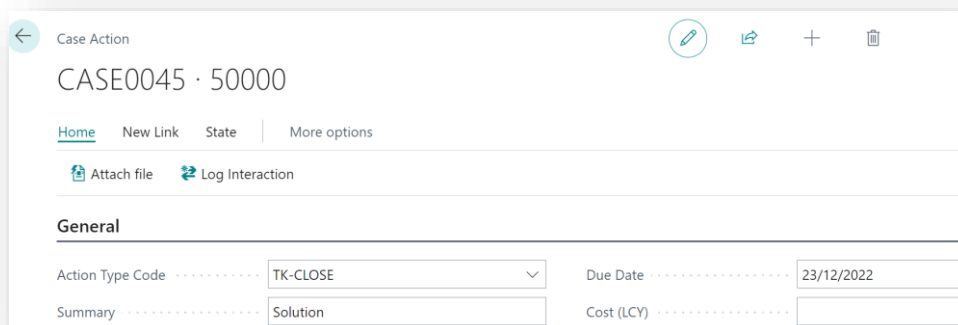


Figure 8-35

- Attach a file to the Action by selecting the **Home** menu group, **Attach File** and browsing to the relevant file(s).
- Log an Interaction for the Action by choosing the **Home** menu group and the **Log Interaction** action. To Log an Interaction for the Action you must have an Interaction Group specified in the **Interaction Groups** FastTab of the Queue Card (Please see the section on **Queues**).
- 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 8-36*) and selecting the Business Central table that you want to link to the Action.

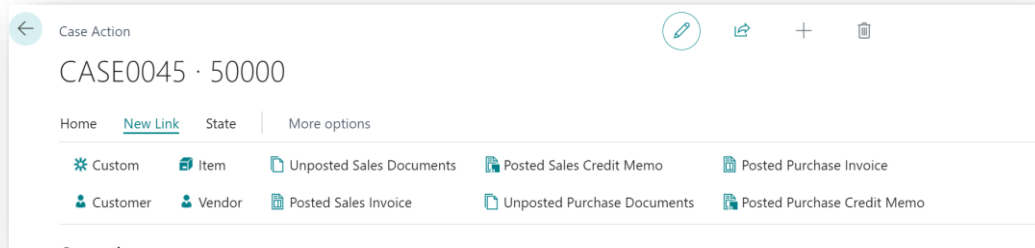


Figure 8-36

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 8-37*).

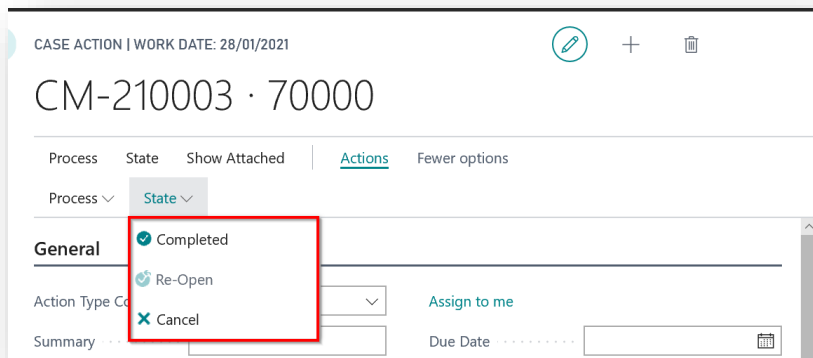
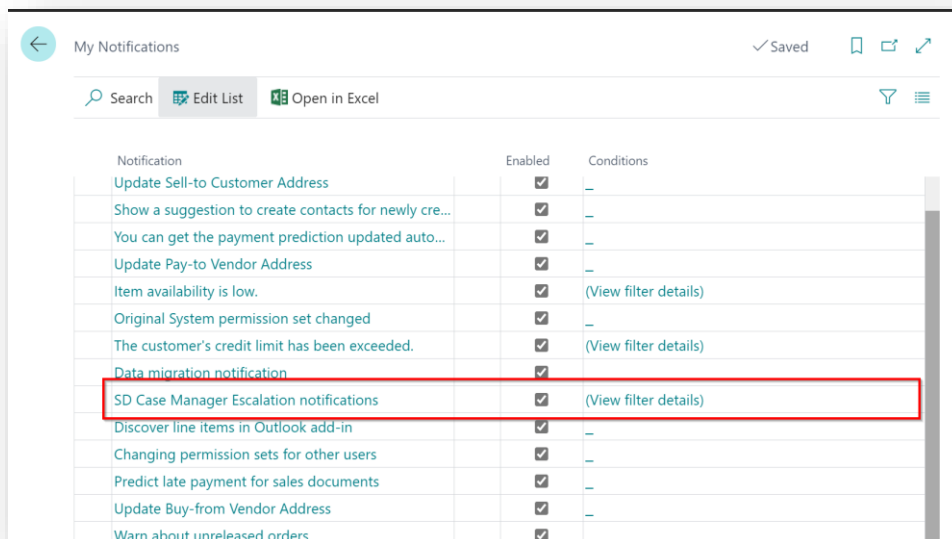


Figure 8-37

8.10 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.

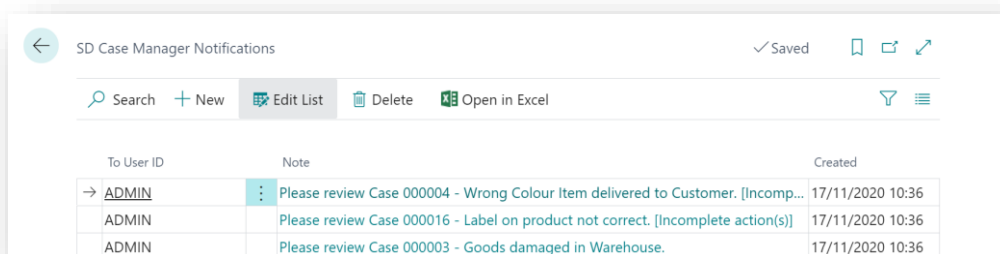
SD Case Manager has an entry in the **My Notifications** list automatically entered and enabled on install (*Figure 8-38*).



Notification	Enabled	Conditions
Update Sell-to Customer Address	<input checked="" type="checkbox"/>	—
Show a suggestion to create contacts for newly cre...	<input checked="" type="checkbox"/>	—
You can get the payment prediction updated auto...	<input checked="" type="checkbox"/>	—
Update Pay-to Vendor Address	<input checked="" type="checkbox"/>	—
Item availability is low.	<input checked="" type="checkbox"/>	(View filter details)
Original System permission set changed	<input checked="" type="checkbox"/>	—
The customer's credit limit has been exceeded.	<input checked="" type="checkbox"/>	(View filter details)
Data migration notification	<input checked="" type="checkbox"/>	—
SD Case Manager Escalation notifications	<input checked="" type="checkbox"/>	(View filter details)
Discover line items in Outlook add-in	<input checked="" type="checkbox"/>	—
Changing permission sets for other users	<input checked="" type="checkbox"/>	—
Predict late payment for sales documents	<input checked="" type="checkbox"/>	—
Update Buy-from Vendor Address	<input checked="" type="checkbox"/>	—
Warn about unreleased orders.	<input checked="" type="checkbox"/>	—

Figure 8-38

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 8-39*).



To User ID	Note	Created
→ ADMIN	Please review Case 000004 - Wrong Colour Item delivered to Customer. [Incomp...	17/11/2020 10:36
ADMIN	Please review Case 000016 - Label on product not correct. [Incomplete action(s)]	17/11/2020 10:36
ADMIN	Please review Case 000003 - Goods damaged in Warehouse.	17/11/2020 10:36

Figure 8-39

Selecting the Note URL link will open the Case Card for the case (Figure 8-40).

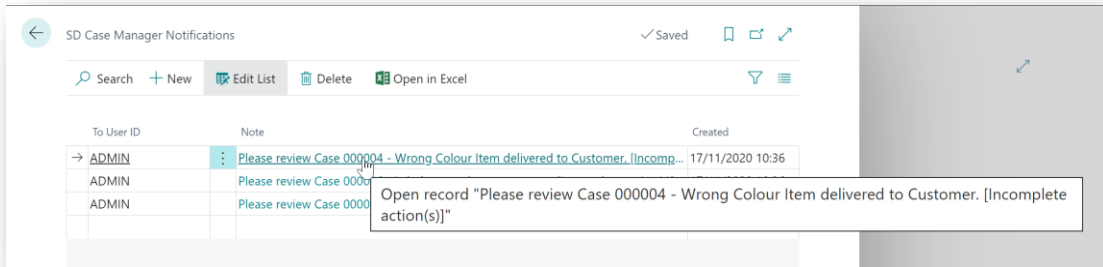


Figure 8-40

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 8-41).

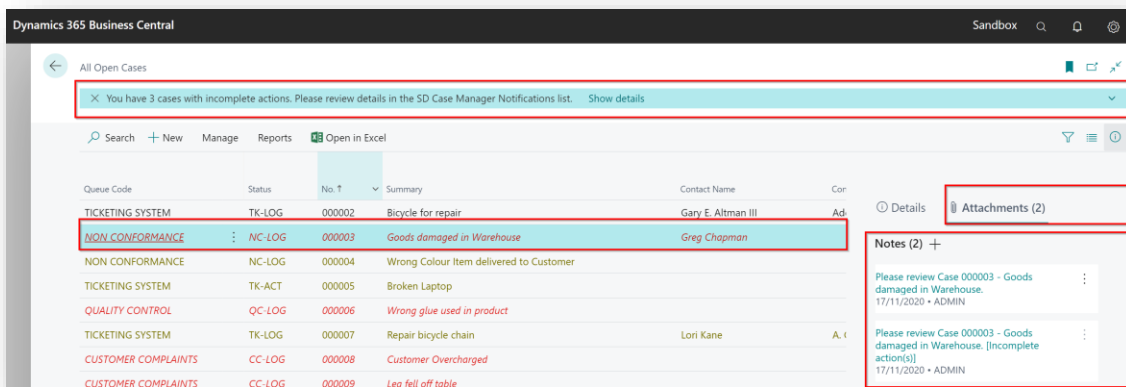


Figure 8-41

9 Executing Escalation Rules Manually

To execute Escalation Rules manually, navigate to the **SD Case Manager – Manager Role Centre**. From the **Process** menu group, select **Execute Escalation Rules**. Alternatively, from the **SD Case Manager Setup** in the **Process** menu group, select **Execute Escalation Rules** (*Figure 9-1*).

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 **Escalations**).

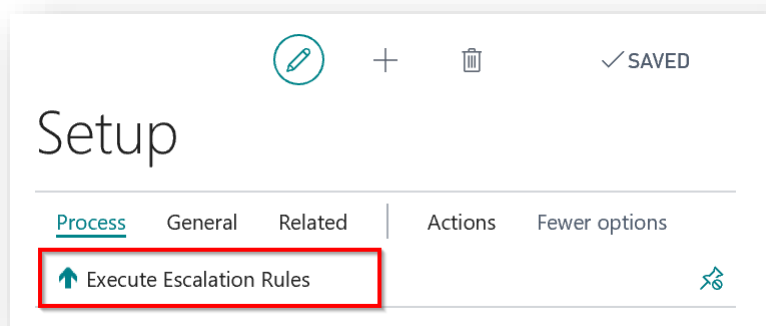


Figure 9-1

10 Executing Escalation Rules Automatically

The SD Case Job Queue Entries are used to Execute Escalation Rules automatically (*Figure 10-1*).

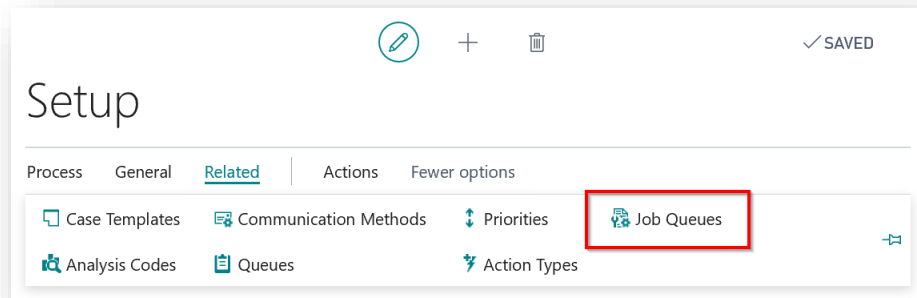


Figure 10-1

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. 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.



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