

3. Pre-Requisite

Pre-Requisite for Case Creation:

Before creating Case below configurations should be done on Case settings. The configuration includes:

1. Case type configuration.
2. Case sub type configuration.
3. SLA configuration.
4. Agent configuration.
5. Case Owner Auto-Assignment Configuration.
6. Case Association Configuration.

Case type configuration.

Case type can be configured by navigating to Settings >> Cases >> Type. It is mandatory to configure Work order type to configure Case type. Below are the parameters involved in Case type configuration.

The screenshot displays the 'Cases' configuration interface. On the left is a sidebar with navigation links: Type, Sub-Type, SLA, Incident Portal, Case Association, Custom Fields, Approaching SLA, and Case Owner Auto Assignment. The main content area is titled 'Cases' and contains a 'Type:' section with '+ Add Type' and '+ Bulk Upload' buttons (labeled 1). To the right is a search bar (labeled 6). Below these is a table of case types (labeled 2). The table has columns for 'Type Name' and 'Status' (labeled 3). The first row shows 'FUNCTIONALITY CASE ISSUE DIVI2' with status 'ACTIVE'. The second row shows 'TEST SANJAY' with status 'ACTIVE'. Each row has edit (pencil icon, labeled 4) and delete (trash icon, labeled 5) buttons. A note above the table states: 'Note: Case type with name "Incident", "Complaint" and "Service Request" shall be displayed on the public case create page.'

Type Name	Status	
FUNCTIONALITY CASE ISSUE DIVI2	ACTIVE	[Edit] [Delete]
TEST SANJAY	ACTIVE	[Edit] [Delete]
NEW TYPE 900 UPDATE2	ACTIVE	[Edit] [Delete]
NEW TYPE UPDATE	ACTIVE	[Edit] [Delete]
SLA NOC	ACTIVE	[Edit] [Delete]

1. **Add type / Bulk upload:** These are the options used to configure case type. Case type can be configured individually or in bulk.
2. **List view:** Case types configured can be viewed in a dynamic table with related information like status, edit and delete features.
3. **Status:** To show the specific Case sub-type status whether active or inactive.
4. **Edit:** To edit specific case type.
5. **Delete:** To Delete specific case type.
6. **Search:** To search specific Case type.

Add Case type page view:

The screenshot shows the 'Add Case Type' modal form. It has a title bar with a close button (X). The form contains three input fields: 'CASE TYPE NAME' (text input), 'Status *' (dropdown menu), and 'WorkOrder Types *' (dropdown menu). At the bottom right, there are 'Cancel' and 'Save' buttons. The background shows the 'Cases' settings page with a sidebar menu and a search bar.

Case sub-type configuration.

Case sub-type can be configured by navigating to Settings >> Cases >> Sub-Type. It is mandatory to configure Case type to configure Case sub-type. Below are the parameters involved in Case sub-type configuration.

The screenshot shows the 'Cases' settings page with the 'Sub-Type' configuration table. The table has columns for 'Sub Type Name', 'Type Name', 'Status', and actions (edit and delete). The table is annotated with numbered red boxes (1-8) indicating key features:

- 1. SUB-TYPE input field
- 2. Select Case Type dropdown
- 3. + Add Sub Type button
- 4. + Bulk Upload button
- 5. Status dropdown
- 6. Edit button (pencil icon)
- 7. Delete button (trash icon)
- 8. Search bar

Sub Type Name	Type Name	Status		
RERER	Service Request	ACTIVE		
WWWR	NREWWR	ACTIVE		
AIR CONDITIONOR SPARE PARTS	FUNCTIONALITY CASE ISSUE DIVIZ	ACTIVE		
AIR CONDITONE PARTS	Test	ACTIVE		
PARTS MAINTAINCE	Test	ACTIVE		

1. **Sub-Type:** To key in manual input the Case sub-type name.
2. **Select Case Type:** To select the case type & associate with case sub-type. It's a mandatory option to be selected while creating Case sub-type.
3. **Add Sub Type & Bulk Upload:** These are the 2 options to configure Case sub-type in settings. Add sub-type option to create individual Case sub-type gets active only on selecting the Case type to associate with Case sub-type.
4. **List view:** Case sub-types configured can be viewed in a dynamic table with related information like status, edit and delete feature.
5. **Status:** To show whether the specific Case sub-type status whether active or inactive.
6. **Edit:** To edit specific case sub-type.

7. **Delete:** To Delete specific case sub-type.
8. **Search:** To search specific Case sub-type.

SLA configuration.

The screenshot shows the 'SLA' configuration page. On the left sidebar, 'SLA' is highlighted. The main content area is titled 'SLA'. At the top, there is a toggle switch labeled 'Allow SLA to be paused outside of working hour' with a sub-note 'If enabled, SLA of the case will be paused outside of working hour.' Below this are two buttons: '+ Add SLA' and '+ Bulk Upload'. To the right is a search bar. Below these is a table with the following columns: SLA Name, Duration, SLA Type, Case Type, Case Sub Type, Asset Category, Urgency, and Priority. The table contains three rows of SLA configurations. Each row has an edit icon (pencil) and a delete icon (trash can) at the end.

SLA Name	Duration	SLA Type	Case Type	Case Sub Type	Asset Category	Urgency	Priority
INSTALLATION...	1hrs 23mins 0hrs mins(OW)	Response	INSTALLATION	INSTALLATION		Severity 1	High
AIR...	1hrs 1hrs(OW)	Response	Test	AIR CONDITIONE...	CATEGORY3	Severity 2	Low
TEST SANJAY 2	1hrs	Response	TEST SANJAY	TEST		Severity 1	High

1. **Allow SLA to be paused outside of working hour:** If User enables this feature, SLA of the case will be paused outside of working hour.
2. **Add SLA & Bulk Upload:** These are the 2 options to configure Response and Resolution SLA in Case settings.
3. **List view:** To show the SLA configured in a dynamic table with related information like duration, SLA type, case type, case sub-type, asset category, urgency, priority edit and delete feature.
4. **Edit:** To edit specific SLA.
5. **Delete:** To Delete specific SLA.
6. **Search:** To search specific SLA.

Add SLA page view:

Add SLA X

SLA Name *
Please enter SLA name

Select Case Type *

Select Case Sub-Type

Select Asset Category

Select Urgency *

Select Priority *

Select SLA Type *

During Working Hour

SLA Duration *

Day Hour Minute

Outside Working Hour

SLA Duration *

Day Hour Minute

Cancel Save

Agent configuration.

Make sure that the Agent details are available in the Agent dashboard. If the Agent name does not exist, add using Add new agent from Agent module.

Agent

Search Filter

	First Name	Last Name	Roles	Profile	Skill Set	Primary Phone Number	Status	Email ID	User Name
	Supervisor-Divi	both	FIELD AGENT-DIVI, SU..	TECHNICAL SPL DIVI	FIELD AGENT DIVI PRO..	+601156244669	Active	divyajanga9@gmail.co..	divi
	divyajang	prasanth	CUSTODIAN, FIELD AGE..	TECHNICAL SPECIALIST	MANAGER	+601156244669	Active	divyajanga9+4@gmail...	divijang

Case Owner Auto – Assignment Configuration.

Define Case Owner auto assignment rule using this configuration. This will impact on the Case creation page. The parameters involved in defining the auto assignment rule are, rule name, threshold, case type, case sub-type, skill sets etc.

Settings < Cases

Cases

Type
Sub-Type
SLA
Incident Portal
Case Association
Custom Fields
Approaching SLA
Case Owner Auto Assignment
Custom Table Configuration

+ Add Rule

Rule Name	Case Type Count	Case SubType Count	Created Date
test siri	2	1	13/07/2024
Tech / Group case request	1	1	21/05/2024
RG-2 VAMSI Rule	2	1	27/05/2024
CASE RULE DIVI	1	1	28/06/2024
TEST Sanjay	1	1	01/07/2024
NEW	1	1	05/06/2024

Items per page: 10
1 - 6 of 6

- Add Rule:** To define Case owner auto assignment rule.
- List view:** To view all the rules configured.
- Edit:** To edit the auto-assignment rule.
- View:** To view the auto-assignment rule.

Case Association Configuration:

Case Association configuration can be completed by navigating to Case Association from Case settings. Case Association will be based on Assets / Location. Based on the issue type the User selects, case type, case sub-type, priority, urgency, response SLA, resolution SLA will get auto populated on Case creation page.

Settings < Cases

Cases

Type
Sub-Type
SLA
Incident Portal
Case Association
Custom Fields
Approaching SLA
Case Owner Auto Assignment

Case Association

+ Add Association

Association	Association Type	Status
Case By loc	Location	<input checked="" type="checkbox"/>
Test Case Association v	Location	<input type="checkbox"/>
association07	Location	<input type="checkbox"/>
Association24	Location	<input type="checkbox"/>

Search
Filter

- Add Association:** To create Case Association.
- List view:** List of Associations can be viewed in a dynamic table.
- Status:** Toggle icon in status column indicates whether the association is active or inactive.

- 4. **Edit icon:** To edit the Association.
- 5. **Delete icon:** To delete the association.

Case Association creation page view:

Association Details

List of Issues

Association Type

Association

Association Name *

e.g Case Association A

List of Issues

Issue Name *

Case Type *

Select

Case Sub-Type

Select

Priority *

Select

Urgency *

Select

Response SLA *

Select

SLA Duration

Resolution SLA *

Select

SLA Duration

Delete

Set as Active

+ Add

Association Details

List of Issues

Association Type

Association Type

By Asset
Use Assets for this association.

By Location
Use Locations for this association.

All Assets

Search

Filter

	Image	Asset	Category	Location
<input type="checkbox"/>		TEST ASEET 21 TEST MODEL 1 (TEST MANU 1)	TEST CAT 1	KL TEST NEW1
<input type="checkbox"/>		Realme REALME NARZO DIVI (DIVI TECHNOLOGIES AS.)	MOBILES DIVI	VIJAYAWADA NEW, BES, ABCD 3