

How to View Cases

The screenshot displays the Microsoft Dynamics AX Role Centre interface. The top navigation bar shows the user is logged in as 'pla' and is in the 'Role centre' area. The left-hand navigation pane is expanded to show the 'Cases' section, with 'Open cases' selected. Below this, the 'Home' section is visible, containing various business modules like Purchase ledger, Sales ledger, and Budgeting. The main content area is titled 'Role centre' and features a 'Personalise this page' link. Under the 'Activities' section, there are several activity cards: 'My activities past due' (0), 'My open activities' (0), 'My new leads' (0), 'New request for quotations' (1), 'My new opportunities' (0), 'Cases in progress' (1), and 'My open cases' (0). Below these are 'Add Cue' and 'Manage Cues' buttons. The 'Tasks' section is currently empty, displaying a table header with columns: Type, Title, Assigned To, Status, Priority, Due Date, % Complete, and Predecessors. A message states: 'There are no items to show in this view of the "Tasks" list. To add a new item, click "New".' Below the message is an 'Add new item' button. The bottom status bar shows the user's name '(1862626)', currency 'GBP', and other system information.

Under the Home section of Dynamics AX you will find Cases, there are pre-set filters to allow you to view 'All Cases', 'Open Cases', 'My Open Cases' and 'My Overdue Cases'

Processing a Case

The screenshot displays a case management application window titled 'Case (1 - pla) - Case ID: PLA-000002, Eyelets on width instead of length'. The interface includes a ribbon bar at the top with tabs for 'File', 'Case', and 'General'. The 'General' tab is active, showing various icons for actions like 'Change status', 'Delete', 'Case process', 'Change stage', 'Time recording', 'Stop', and 'Attachments'. The main content area is divided into several sections:

- General:** Contains fields for Case ID (PLA-000002), Description (Eyelets on width instead of length), Parent case, Billing project (Name: SCP Pool Portugal, Case category: Covers, Category type: Sales), Owner (Primary contact, Department: Covers Department, Employee responsible: Steve Wood), and Process (Case process, Status: Opened, Priority, Case resolution: None).
- Follow-up:** Includes E-mail ID, Date/time sent, Questionnaire, Contact ID, and Date/time answered.
- Service level agreement:** Shows Service level agreement (Medium), Compliance (0.00), Status (Started), Completion date (28/11/2016 10:39:48), and Start time (18/11/2016 10:39:48).
- Case log:** A table with columns for Created date/time, Created by, Source type, Source ID, and Description. One entry is visible: 18/11/2016 10:39:48, Lindsey.
- Notes:** A text box containing the note: 'Customer wanted eyelets on the length of the cover but they was put on the width instead - will offer customer more discount to cut them off and keep the cover'.

The right-hand side of the window features a sidebar with sections for 'Primary address', 'More information', and 'Process'. The bottom status bar shows navigation icons, a search bar, and a 'Close' button.

After a case has been created it will be assigned to the relevant person, the system will also set a target completion date. To start work on a case the status needs to be changed from 'Opened' to 'In Progress' this can be done on the top left-hand side of the page.

You will find a brief description of the issue and the customer's name and category the case relates to in the 'General' area of the Case page.

At the bottom of the page you will find more detailed notes about the issue raised, there may also be attachments relating to the case and these can be accessed through the attachment link in the ribbon bar at the top of the page.

Cases can be reassigned to a different department or person by changing the employee responsible or department dropdown under the 'Owner' area.

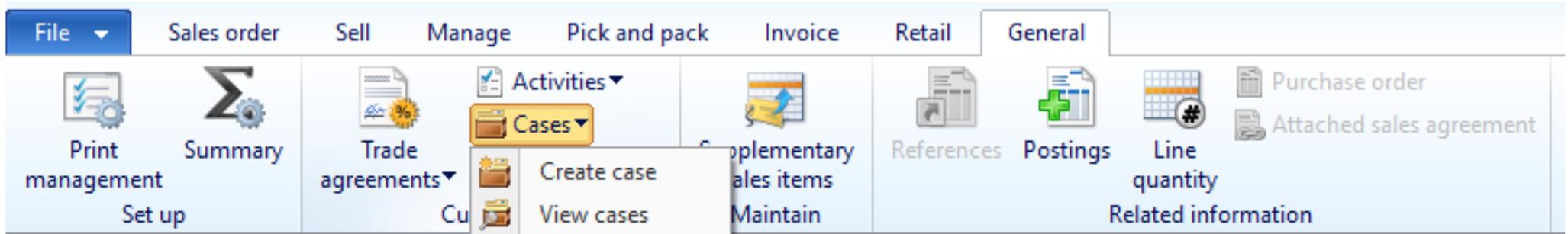
Once a case has been resolved the details of the action taken and any other information should be added to the notes and the status set to 'Closed'.

Creating a Case

Cases can be created throughout AX including the customer page, sales order and under product management. In the ribbon bar at the top of a page click on the 'General' tab and you will find a link to create a case.

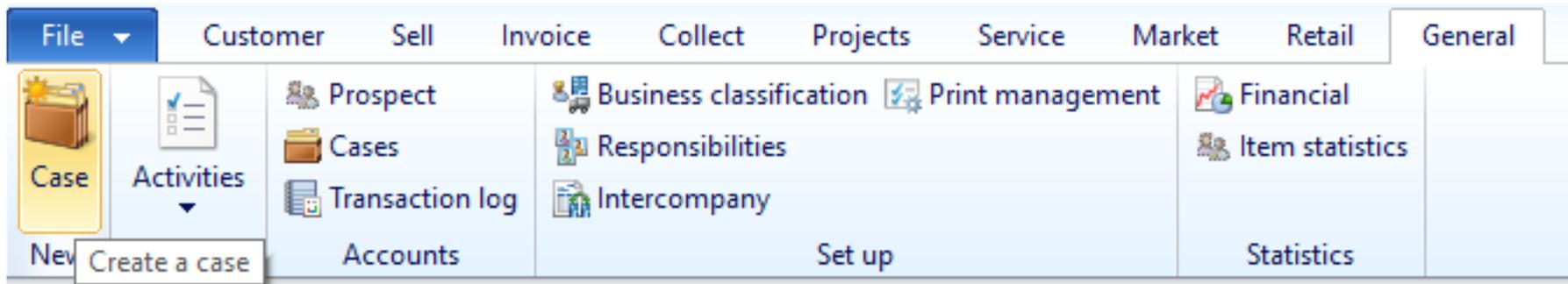
Sales Orders

To create a case relating to a sales order you would find the sales order and create a case



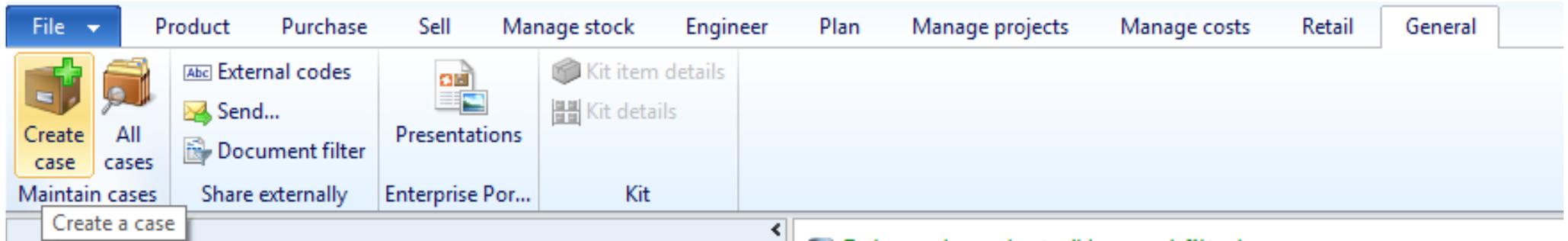
Account Page

To raise a case relating to an issue with a customer's account go the customer screen and click on create a case



Product Management

To create a case relating to an issue with a product go to the released product page and click create a case against the relevant item



In the drop down box 'Name' select the customer

The image shows the 'New case' dialog box in SAP. The title bar reads 'New case (1 - pla) - Item number: 0546NT, O Ring NT Size 343'. The dialog is divided into several sections:

- General** (marked with a red star):
 - Source**: Name: [dropdown]
 - General**: Case category: [dropdown], Case ID: [text], Status: [text], Description: [text], Priority: [text], Parent case: [text]
 - Other**:
 - Owner**: Department: [text], Employee responsible: [text]
- Case log**:
 - Case log**: Description: [text], Notes: [text area]

On the right side of the dialog, there is a table with columns 'Name' and 'Part'. The 'Part' column contains the value '0000' for all rows. The 'Name' column lists several customer names. The first row is selected. To the right of the table, there are fields for 'Telephone:', 'E-mail:', and 'Primary address:'. At the bottom right of the dialog, there are 'Select' and 'Cancel' buttons.

Name	Part
	0000
1 Stop Pool Shop	0000
1066 Pools Ltd	0000
123 Pools Ltd	0000
3 Seas Deliveries Ltd	0000
365 Technical Plant Services	0000
A & C Pumps Ltd	0000
A & D Pools Ltd	0000
A & M Services	0000

Next select 'Case Category' drill down through the tree to select the relevant issue

New case (1 - pla) - Sales order: SO00080049, Apulia Pools

General *

Source
Name: Apulia Pools

General
Case category: [dropdown] Category type: [dropdown]
Case ID:
Status:
Description:
Priority:
Parent case:

Other

Owner
Department:
Employee responsible:

Case log
Case log
Description: [text area]
Notes: [text area]

Tree view | List view

- Case category
 - Sales
 - Carrier
 - Late
 - Misroute
 - Damaged
 - Missing
 - Driver
 - Cservices
 - PickDes
 - Prod
 - Purch
 - Finance

Create Cancel

Type in a brief description of the issue in the 'Description' box and add a full description in the 'Notes' section, once you have finished click 'Create' to add attachments go to the view cases screen

New case (1 - pla) - Sales order: SO00080049, Apulia Pools

General

Source
Name: Apulia Pools

General
Case category: Late Category type: Sales
Case ID: PLA-000004
Status: Opened
Description:
Priority:
Parent case:

Other

Owner Department: Production Office Employee responsible: Angie Simmons

Service level agreement Service level agreement: High

Case process Case process:

Case log

Case log Description:
Notes:

Create Cancel

Case Resolution

Prior to closing a case, the final resolution should be confirmed with a senior team member. Once confirmed, you should then change the “Case Resolution” drop down menu to either “Accept” or “Reject” depending on the outcome of the investigation.

The screenshot displays a software interface for case management. The title bar reads "Case (1 - pla) - Case ID: PLA-000065, delivery not upgraded". The interface includes a menu bar with "File", "Case", and "General". Below the menu bar is a toolbar with various icons for actions like "Edit", "Change status", "Delete", "Case process", "Change stage", "Start", "Stop", "Time recording", "Recall", and "Attachments".

The main content area is titled "PLA-000065 : delivery not upgraded" and is divided into several sections:

- General**: Contains fields for Case ID (PLA-000065), Description (delivery not upgraded), Parent case, Billing project, Name (Cornwall Pools Ltd), Case category (Late), Category type (Sales), Owner (Primary contact, Department: Customer Services Department, Employee responsible: Unknown), Process (Case process, Status: Closed, Priority, Case resolution: None, None, Accept, Reject), Follow-up (E-mail ID, Date/time sent, Questionnaire, Contact ID, Date/time answered), and Notes.
- Service level agreement**: A section for service level agreements.
- Case log**: A section for case logs.
- Associations**: A table showing associations between entities. The table has columns for Primary, Entity type, ID, and Name. It lists two associations: Customer (CORN03, Cornwall Pools Ltd) and Sales order (SO00084632, Cornwall Pools Ltd).

At the bottom of the interface, there is a status bar showing "Customer account: CORN03, Customer group: C, Name: Cornwall Pools Ltd, Currency: GBP" and a "Close" button. A tooltip at the bottom left reads "Select Accept if the case was resolved without needing further action".

Closing a Case

Once a case has been resolved, it should then be moved to the “Closed” status. To do this, highlight/open the desired case and select “Closed” from the “Change Status” drop down menu under the “Case” tab.

The screenshot displays the Microsoft Dynamics AX interface for 'Plastica Limited'. The 'Case' tab is active, and the 'Change status' dropdown menu is open, showing options: 'Opened', 'In progress', 'Cancelled', and 'Closed'. The 'Closed' option is highlighted. Below the menu, a table lists several cases. The case 'PLA-000119' is selected, and its details are shown in a pane at the bottom.

Case ID	Name	Description	Status	Employee responsible	Case category
PLA-000031	World of Water Ltd (Manchester)	Missing screws from kit	Closed	Daniel Sawyer	Missing
PLA-000100	Bubbltubs Ltd	AG8-2DC shown on web but OOS	Closed	Daniel Sawyer	Stock
PLA-000114	UK Pool Store Ltd	web order	Opened	Daniel Sawyer	Late
PLA-000117	Doughboy Uk Ltd	goods not sent on overnight	Opened	Daniel Sawyer	RF Smart
PLA-000119	All Aspects Carp. & Sp Svces	Late Delivery	In pro...	Daniel Sawyer	RF Smart

PLA-000119 : All Aspects Carp. & Sp Svces
Created date and time | Created by | Description
26/05/2017 11:51:59 | Sam.Hudd | Late Delivery