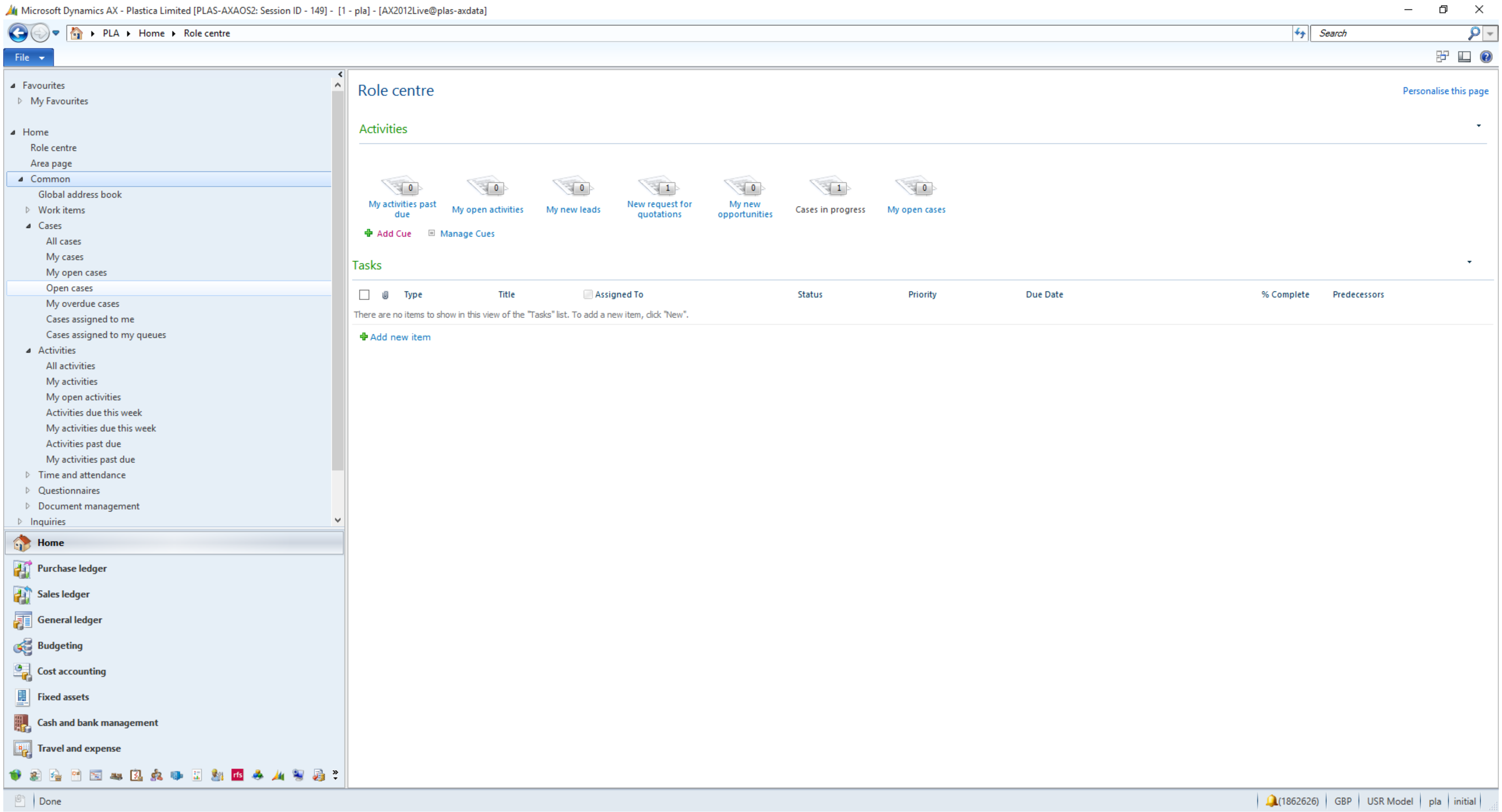
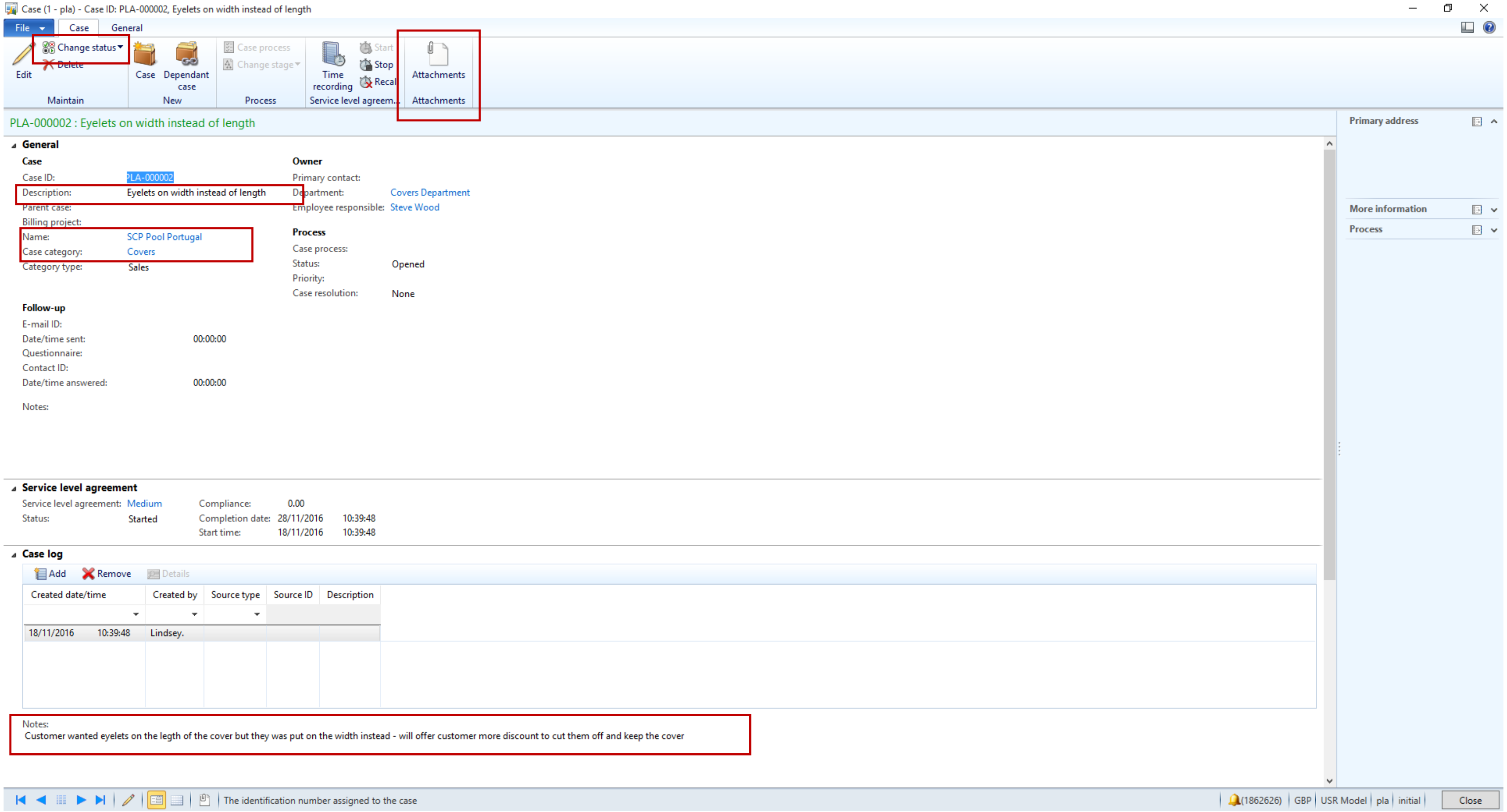
How to View Cases



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



After a case has been created it will be assign it 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' are 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

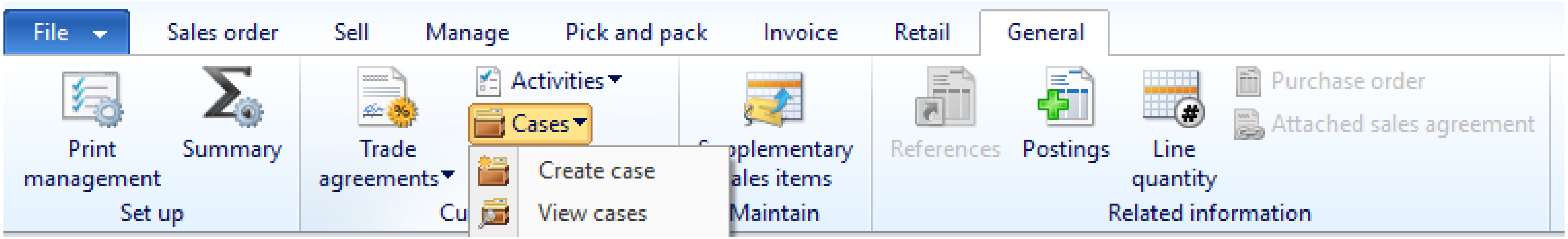
Once a case has been resolved the details of the action taken and any other information should be added to the notes and the status set to 'Closed'.

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.

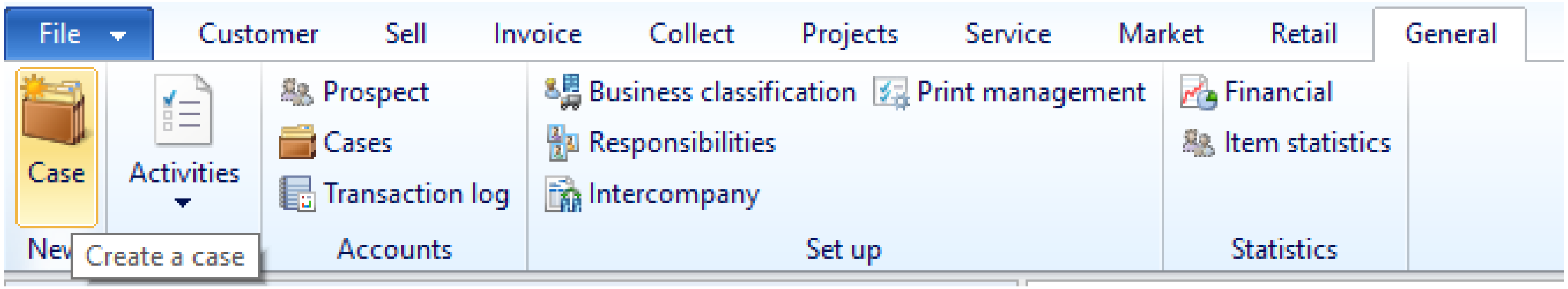
Sales Orders

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



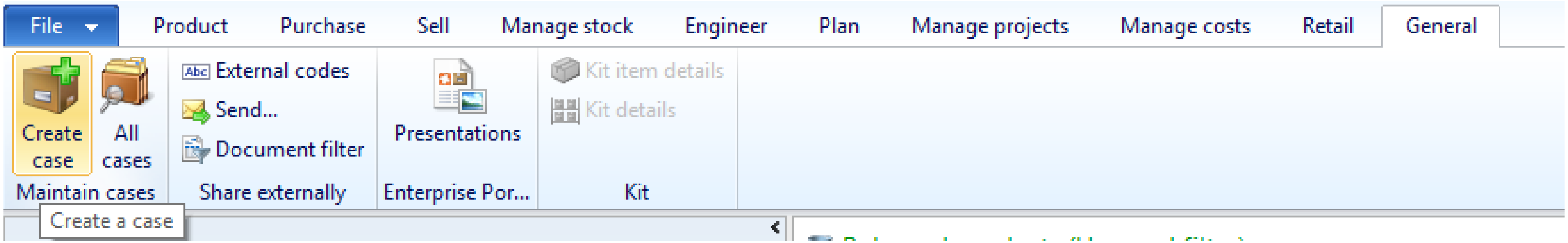
Account Page

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

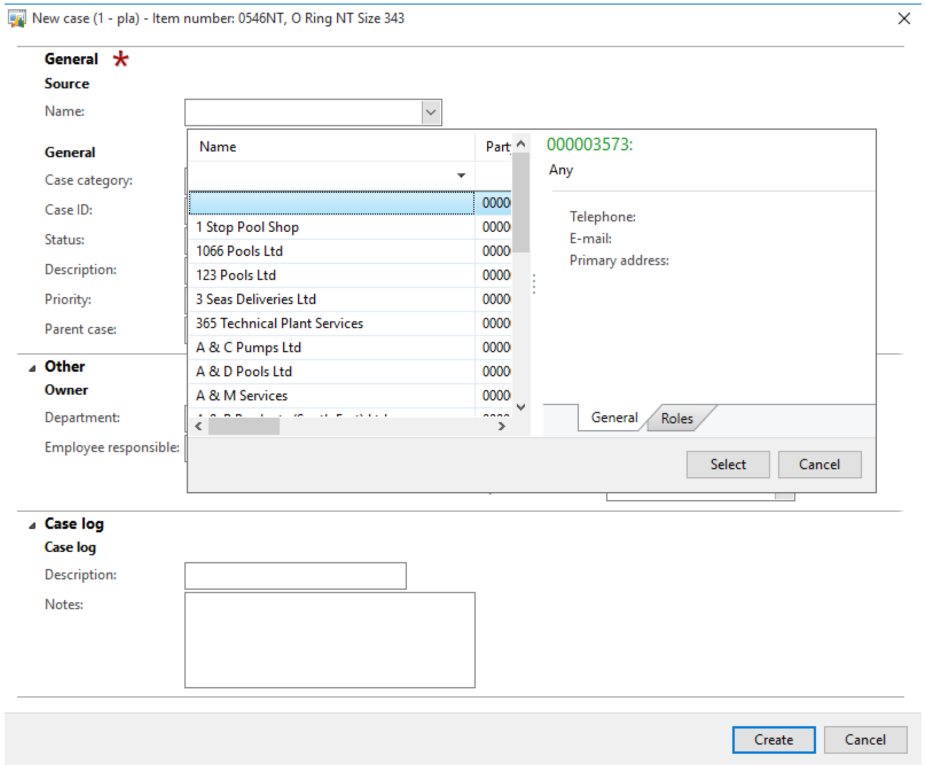


Product Management

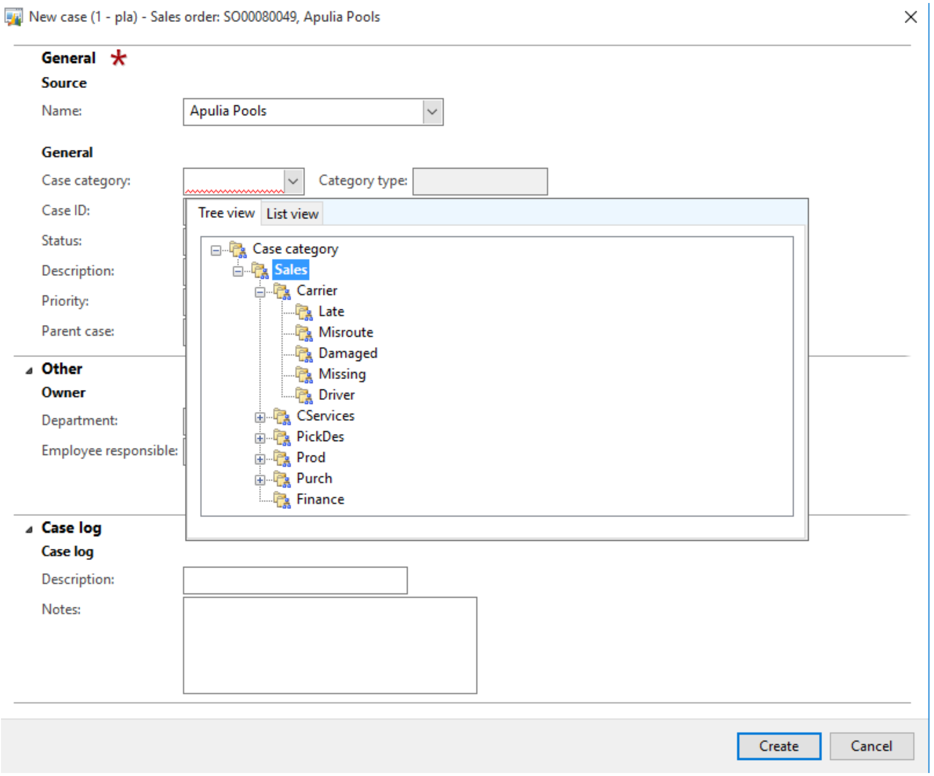
To create a case relating to an issue with a product go to the released product page and click create a case against the relevant item



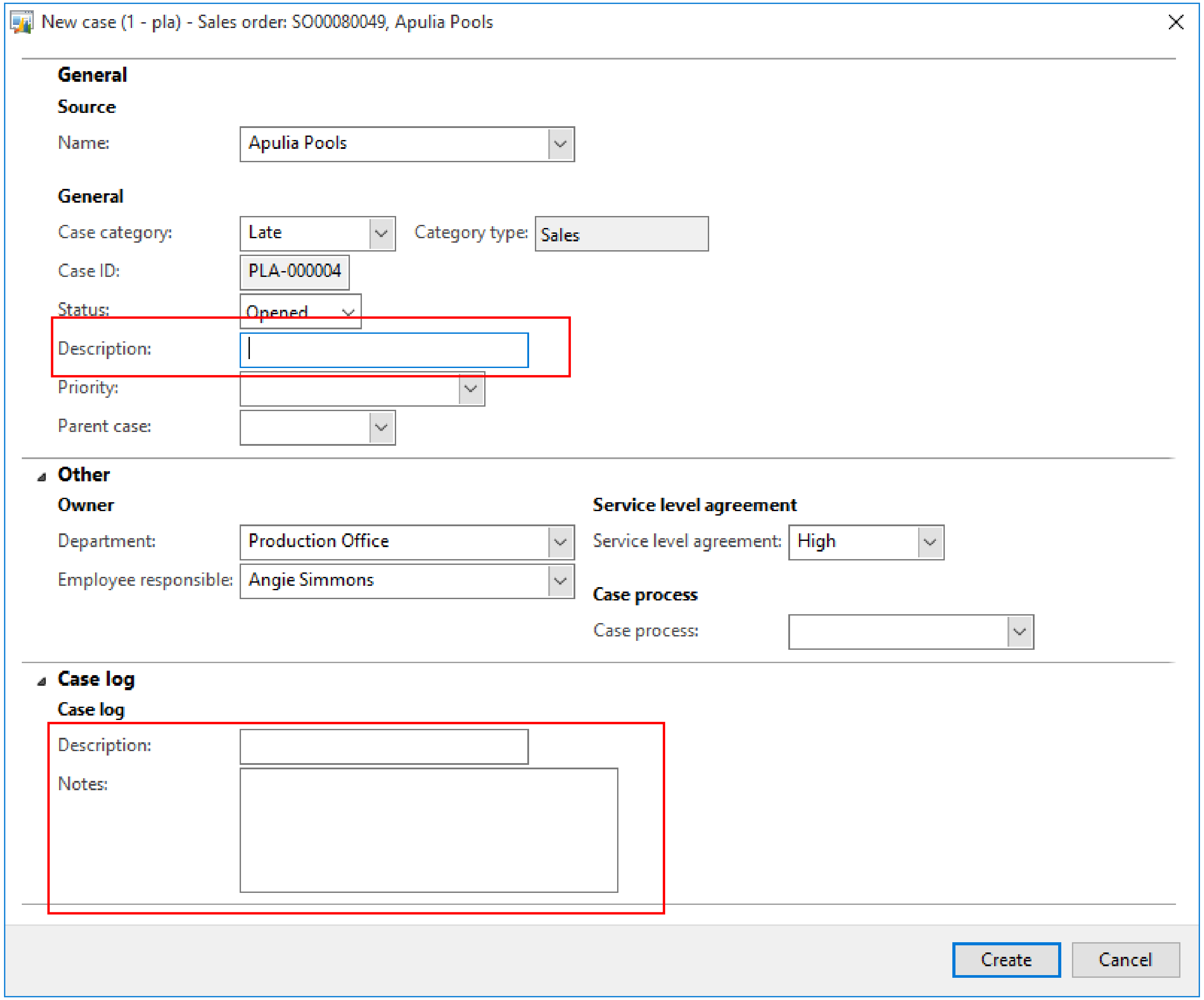
In the drop down box 'Name' select the customer



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

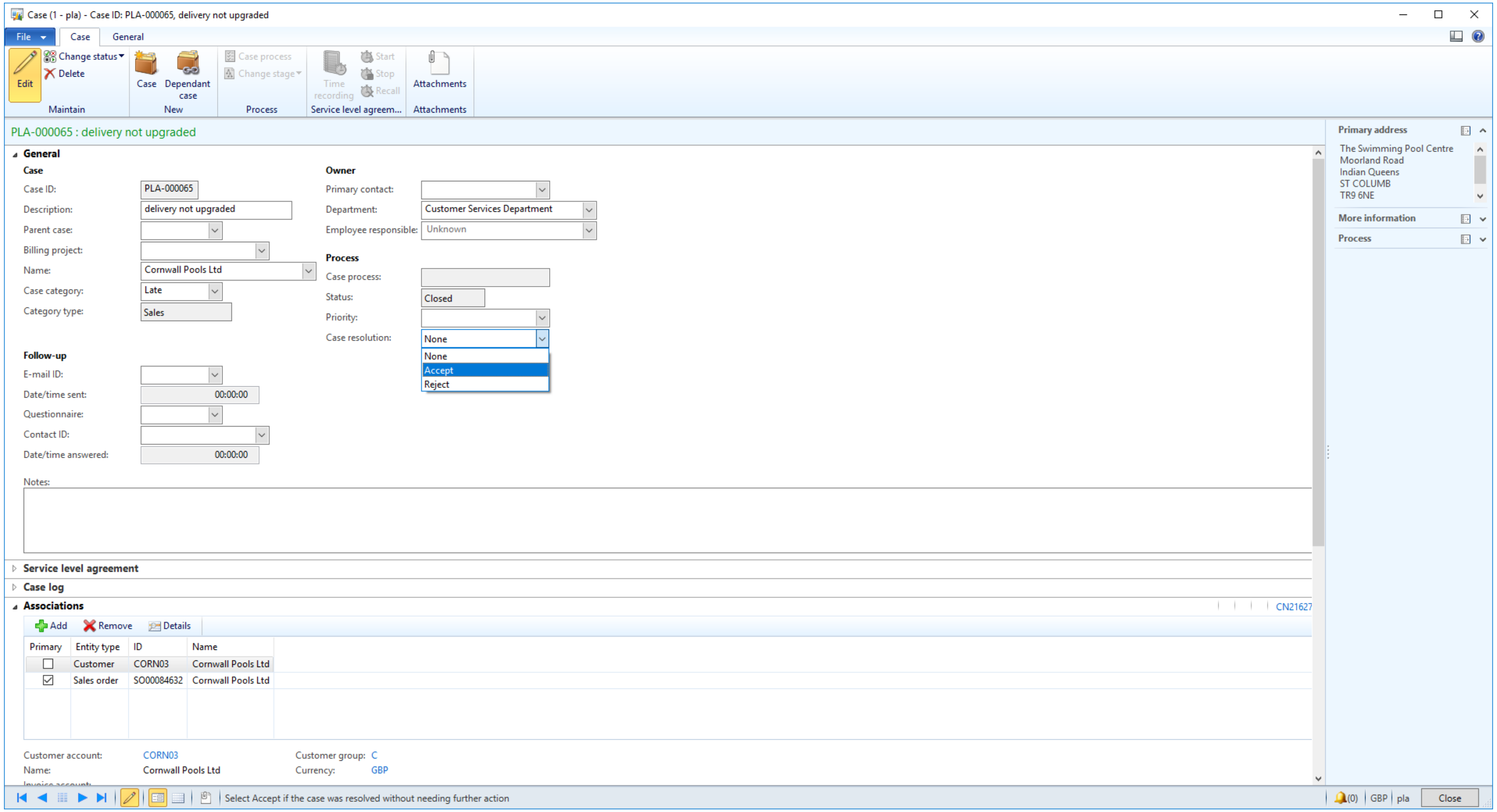


Type in a brief description of the issue in the 'Description' box and add a full description in the 'Notes' section, once you have finished click 'Create' to add attachments go to the view cases screen



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.



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.