Dynamics Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Case Manager

Release: D365 BC V26+

Revision: June 2025

1 Contents

2 Getting Started

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

The different streams of Cases are grouped into Queues. Using Queues in SD Case Manager, you can set up a flexible means of creating user-definable workflows and to-do Actions for the Cases in the Queue. These user-definable workflows and to-do Actions are managed and defined using Queue Statuses and Action Types.

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

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

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

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

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

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

3 Installing SD Case Manager

3.1 Setup Wizard and Activating the Free Trial Licence

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

By default, the **Allow HttpClient Requests** option is automatically enabled on install of SD Case Manager. Switching on the **Allow HttpClient Requests** option for SD Case Manager in **Extension Management** allows SD Case Manager to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

On install, the **Setup Wizard** guides you through activating a free 30 day trial and importing setup data.

In the **Setup Wizard**, enter your company name and email. Select **Free Trial** to start a 30 Day Free Trial. Then choose **Next Step** *(Figure 3-1)*.

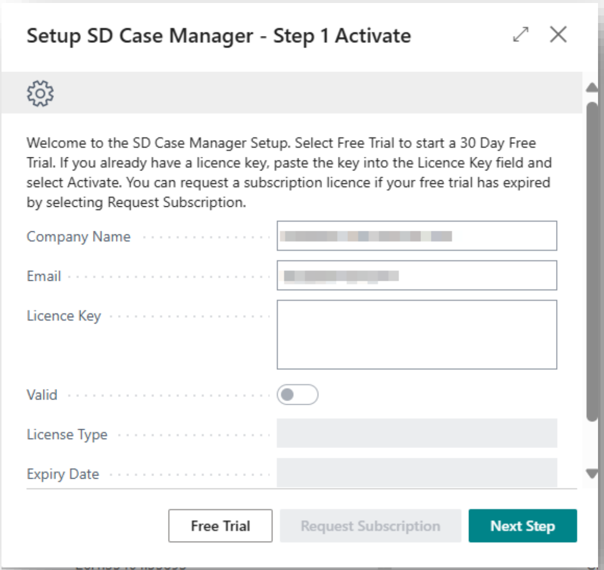


Figure 3-1

If this is your first time to install SD Case Manager, choose the **Apply Standard Setup**. Choosing **Finish** will open the SD Document Sender Role Centre in another tab. *(Figure 3-2)*.

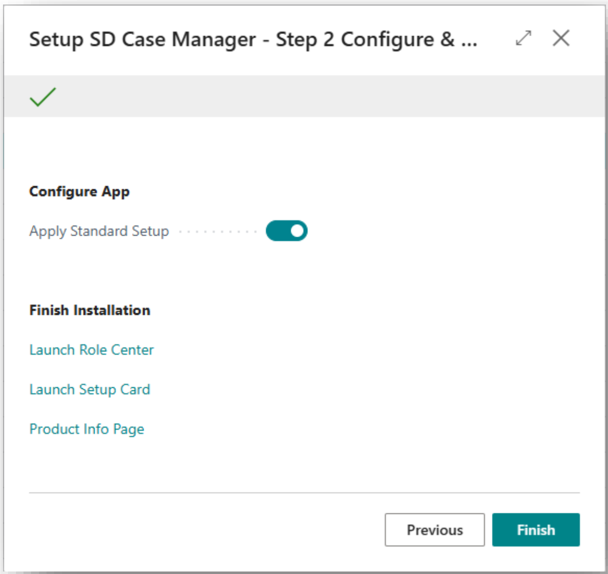


Figure 3-2

3.2 Security Setup

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

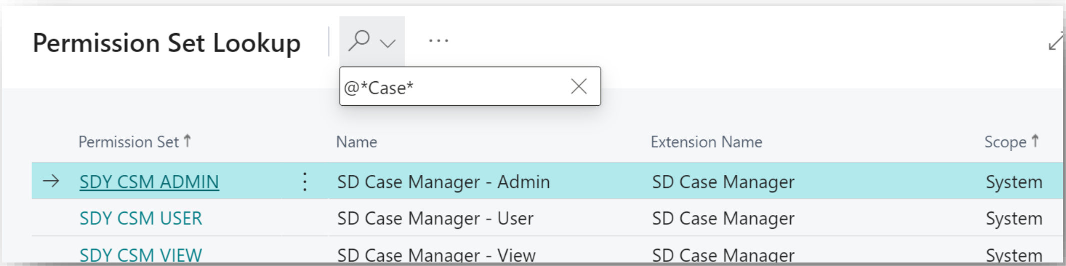


Figure 3-3

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

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

3.3 Choosing the SD Case Manager Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 3-4)*.

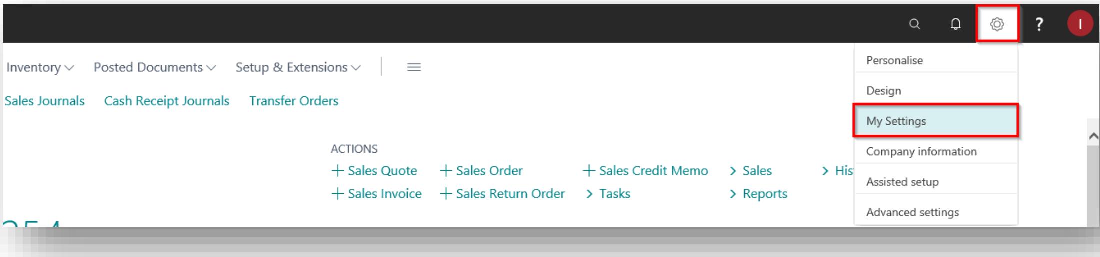


Figure 3-4

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 3-5)*.

Figure 3-5

3. You should see **SD Case Manager Manager** in the list of Roles *(Figure 3-6).* Choose the **SD Case Manager Manager** role and click **OK**.

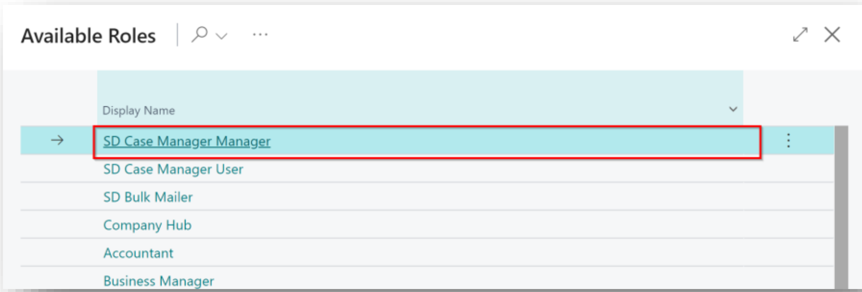


Figure 3-6

4. .The **SD Case Manager Manager** Role should now be displayed in the **Role** field *(Figure 3-7)*.

Figure 3-7

3.4 Accessing the SD Case Manager Pages

Use the **Tell Me** to search for SD Case Manager pages. Begin typing **SD** or **Case** to see a list of the SD Case Manager pages *(Figure 3-8)*.

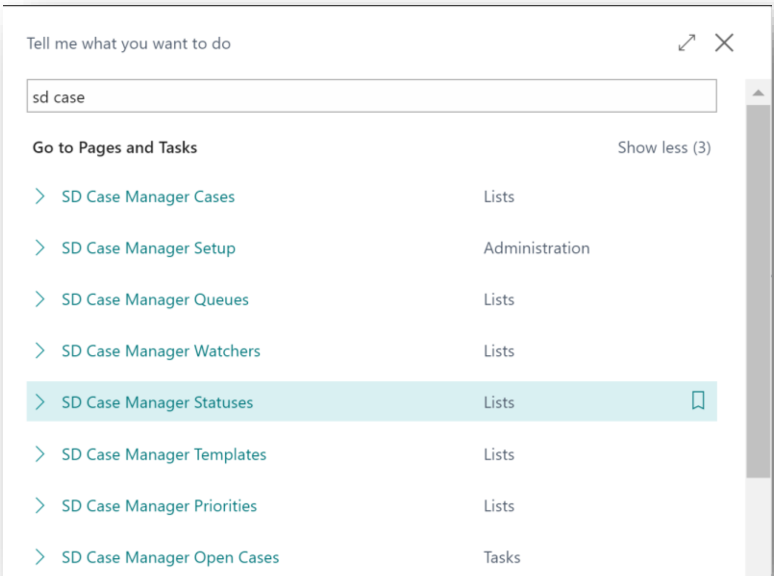


Figure 3-8

3.5 Bookmarking the SD Case Manager Activities to Your Role Centre

For easy access to SD Case Manager, you can bookmark the SD Case Manager Activities page to your default Role Centre.

Search for **SD Case Manager Activities** in the Tell Me and choose the Book Mark action to the right of the result *(Figure 3-9)*.

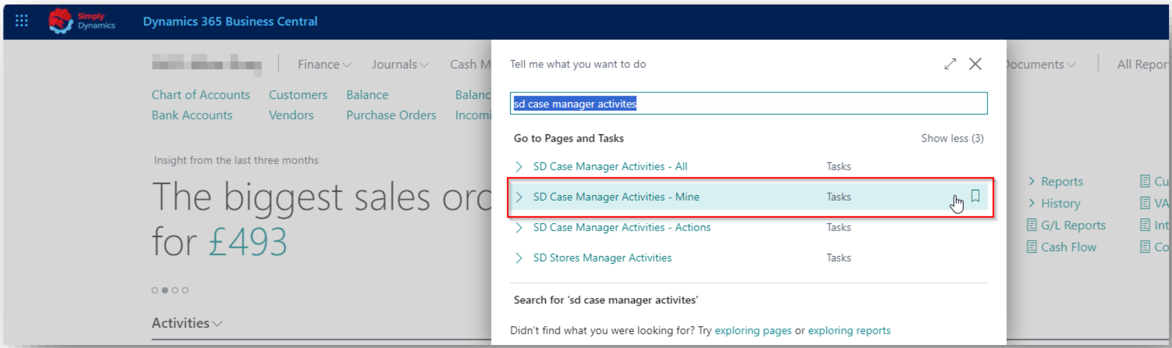


Figure 3-9

The SD Case Manager Activities is now available in the navigation menu on your Role Centre *(Figure 3-10)*.

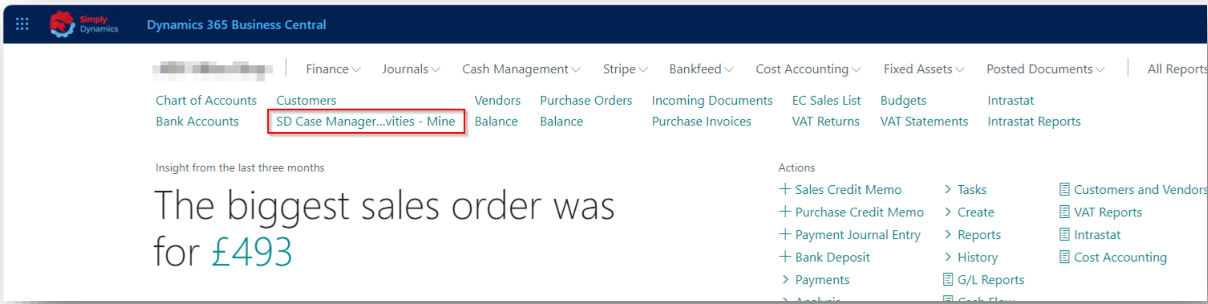


Figure 3-10

3.6 Activating the SD Case Manager Licence with a Subscription Key

When your free 30 day trial licence has expired, you can request a subscription key from Simply Dynamics.

From the Tell Me, search for and select the **SD Case Manager Setup** page. In the Home menu group, choose the **Product Activation** action *(Figure 3-11)*.

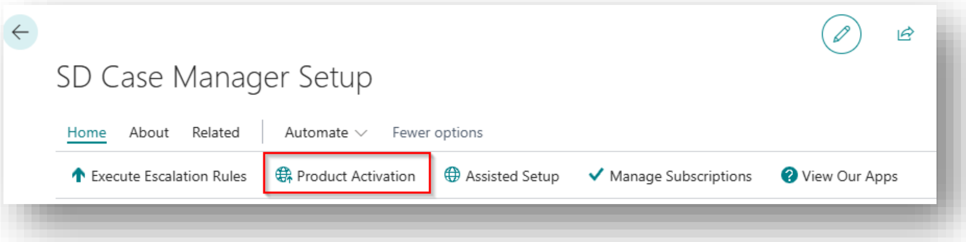


Figure 3-11

In the **Activate your product** page, request a subscription licence by selecting **Request Subscription** *(Figure 3-12)*.

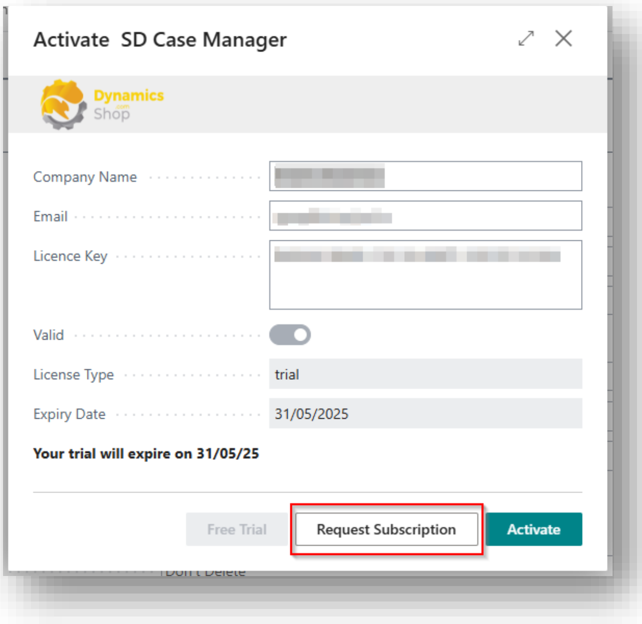


Figure 3-12

When you have received your subscription licence, in the **Activate your product** page *(Figure 3-13)*:

1. Enter your company name in **Company Name** and enter your company email in **Email.**

2. 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***.*

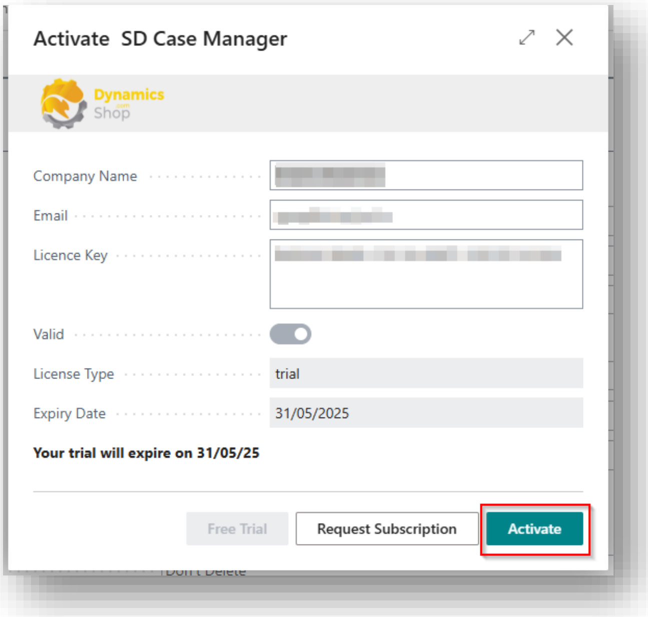


Figure 3-13

3. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the expiration date of the subscription key. Choose **Finish** to exit the page.

3.7 Setup and Configuration

3.7.1 SD Case Manager Assisted Setup

If you did not choose to run the SD Case Manager Setup Wizard, you can easily import default setup using the **Assisted Setup** action on the **SD Case Manager Setup** card.

1. In the **SD Case Manager Setup**, from the menu choose the **Home** group, and then **Assisted Setup** *(Figure 3-14)*.

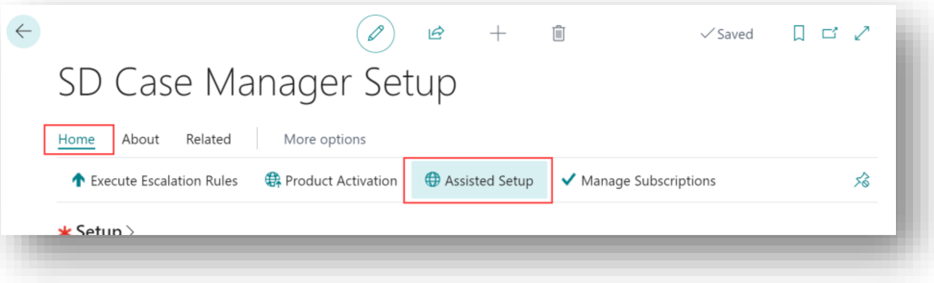


Figure 3-14

2. You are prompted as per the below. Choose **Yes** if this is your first time to use SD Case Manager and you have not already created any setup data *(Figure 3-15)*.

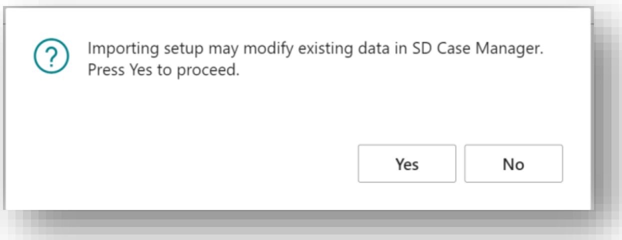


Figure 3-15

3. You are prompted again, choose **Yes.** You will see a message that the default setup has imported. Choose **OK** *(Figure 3-16)*.

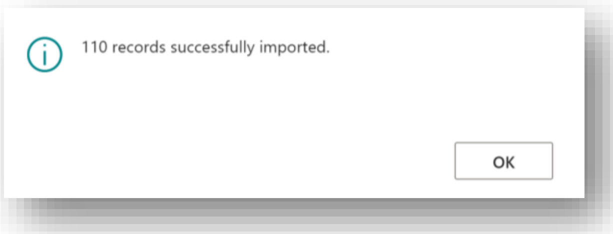


Figure 3-16

3.7.2 Creating an Azure Portal Registered App

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

1. Log into your Azure portal.
2. Search for and navigate to “Microsoft Entra ID”. Choose “Add” and then “App Registration” to create a new App.
3. Give your App a name.
4. In the “Supported account types” section, choose the first option, “Accounts in this organizational directory only”.
5. Select “Register “

You then need to give your App certain API permissions *(Figure 3-17)*:

1. Navigate to the API permissions tab and choose “Add permission”.
2. Select Microsoft Graph

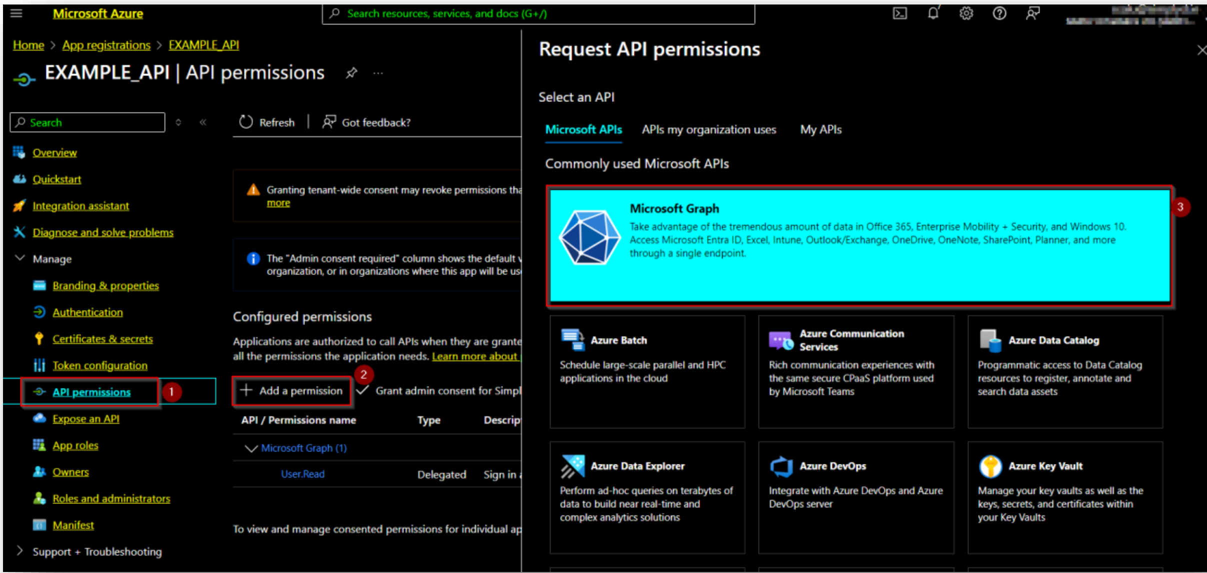


Figure 3-17

In the Microsoft Graph API Permissions page *(Figure 3-18):*

1. From the Request API permissions select Application permissions
2. From the list of “API/Permissions”, select Mail.Send
3. Choose “Add Permissions”

4. From the list of “API/Permissions”, select Mail.ReadWrite
5. Choose “Add Permissions”

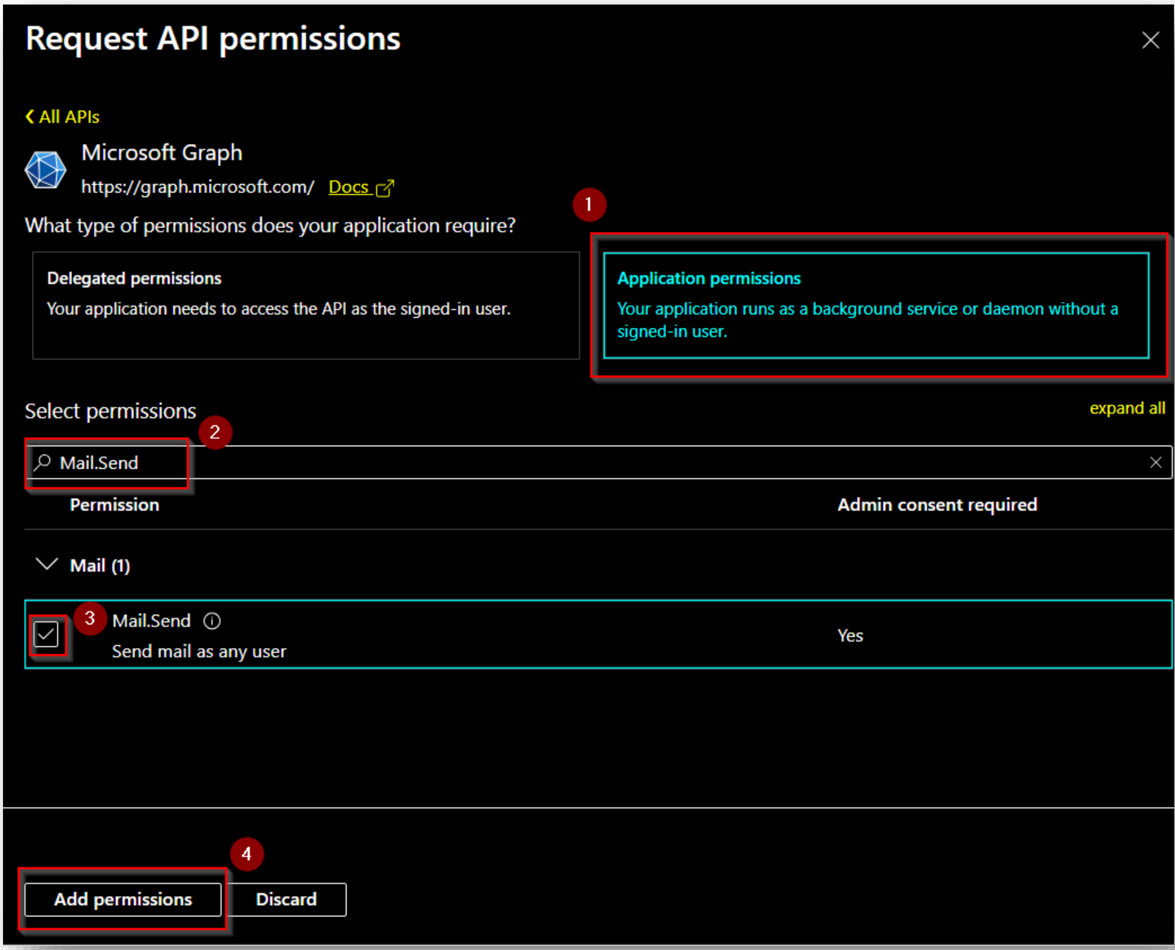


Figure 3-18

Select the Mail.Send API and choose “Grant admin consent for…” *(Figure 3-19)*. This step will have to be completed by someone who has admin rights in your Azure environment.

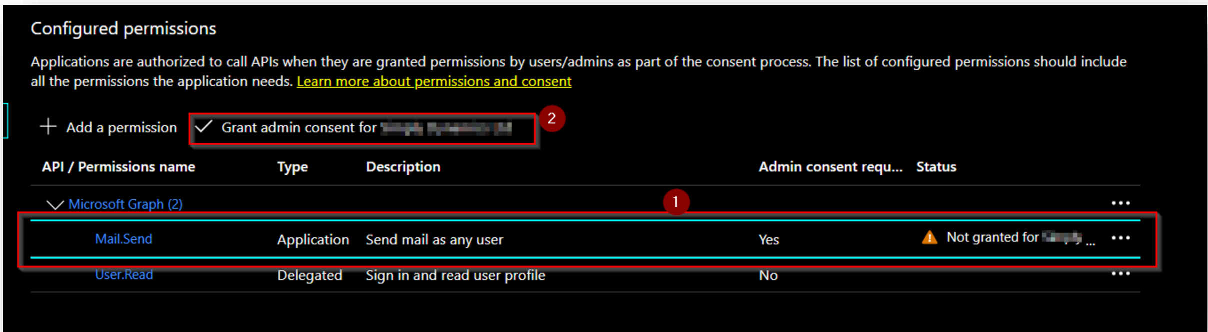


Figure 3-19

Repeat the same step for the Mail.ReadWrite API. Select the Mail.ReadWrite API and choose “Grant admin consent for…”. This step will have to be completed by someone who has admin rights in your Azure environment.

Once permissions are granted the Status will update as per below *(Figure 3-20).*

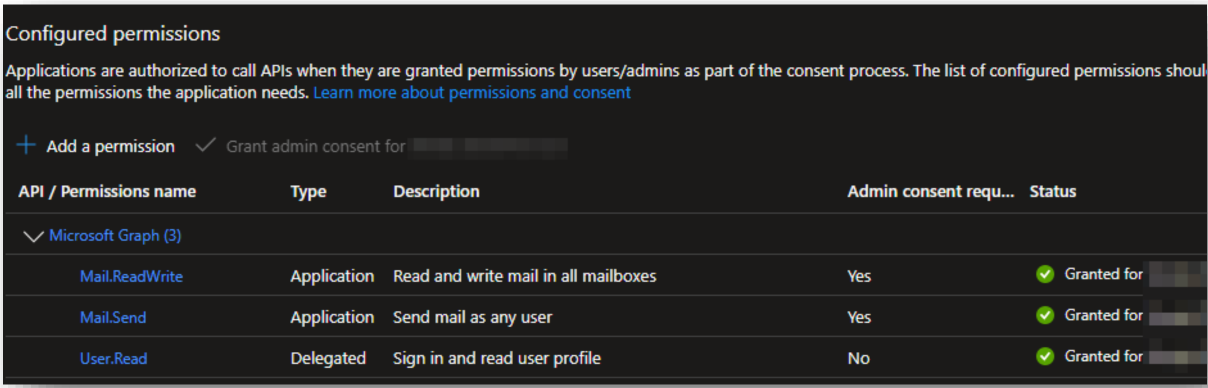


Figure 3-20

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

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

You will need the Application (client) ID and the Client Secret to place into the fields in the **Email** FastTab of the **SD Case Manager Setup** card. This setup is explained in section 4.1 Setup.

When your client secret expires you will need to create a new secret and place this new secret in the field on the **Email** FastTab of the **SD Case Manager Setup** card. To create a new secret go to the App in Azure and from the menu choose “Manage” and then “Certificates & secrets” choose “New client secret”.

4 Using SD Case Manager

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

4.1 Setup

The **SD Case Manager Setup** page is accessed from the **SD Case Manager Manager Role Centre**, by selecting the **Setup** action, or, by searching for page in the **Tell Me** *(Figure 4-1)*.

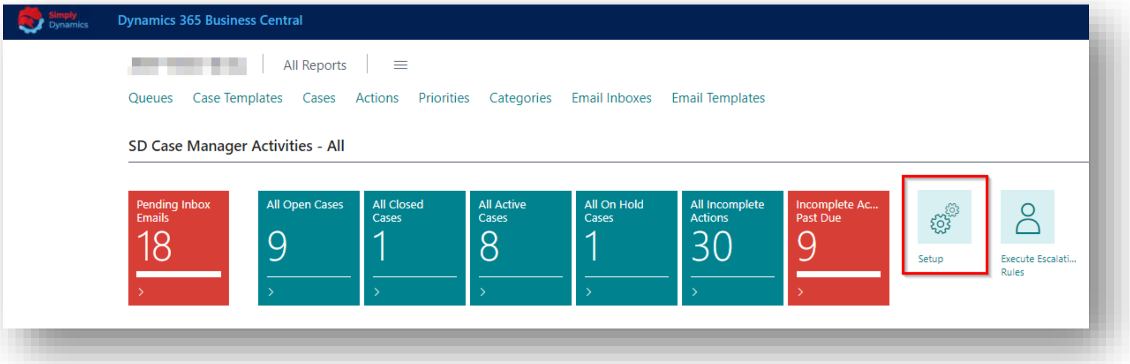


Figure 4-1

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

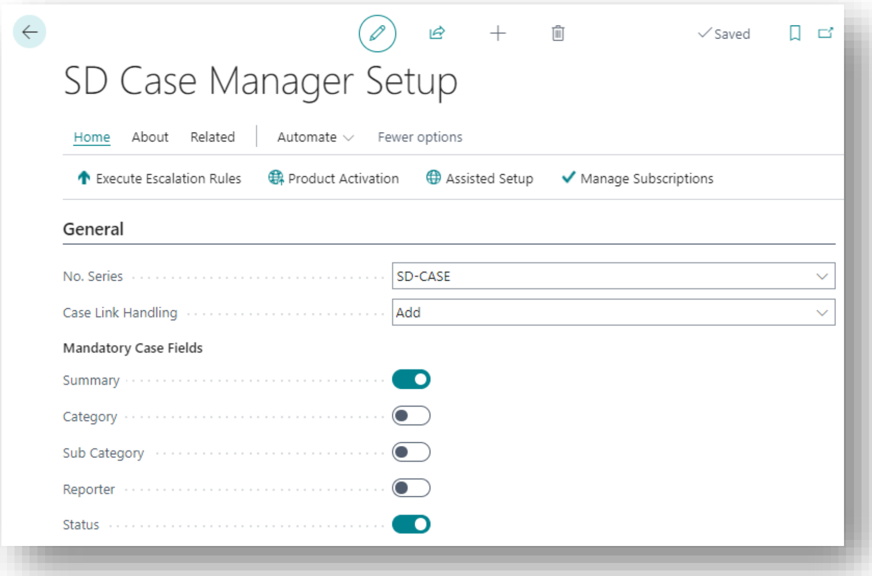


Figure 4-2

- **No. Series** – Select the No. Series to use when creating Cases in SD Case Manager.

- **Case Link Handling** – Choose how to handle record links on Case Actions for end-of-life transactions when the original documents are posted. Applies to Sales and Purchase Quotes, Orders, Credit Memos, and Invoices.
    - **Ignore** - The record link on the Case Action is not updated.
    - **Modify** – The record link on the Case Action is modified to link to the newly created document.
    - **Add** – A new record link to the newly created document is created on the Case Action.
    - **Delete** – The record link to the end-of-life transaction is deleted when the document is posted.

- **Mandatory Case Fields** - Specify what fields must be entered on a Case card before a Case can be saved.

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

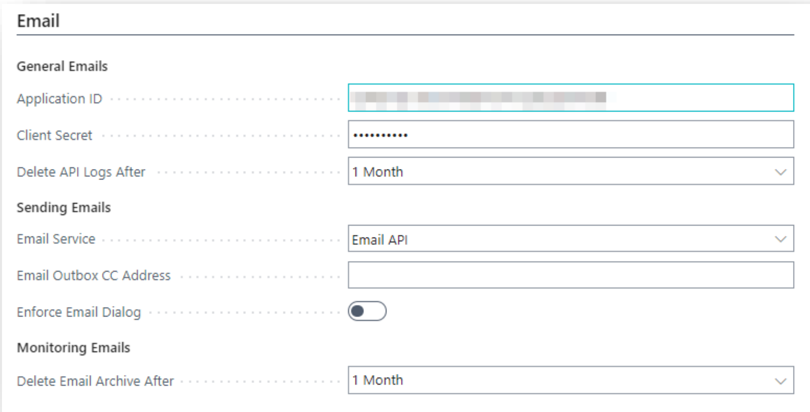


Figure 4-3

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

- **Client Secret** –Enter the Client Secret for your Azure Portal registered app.

- **Delete API Logs After** - Specify when to delete the API logs of your Azure Portal registered app.

- **Email Service** – Choose whether to send outgoing emails from SD Case Manager using standard Business Central **Email Accounts** or an **Email API** (your Azure Portal registered app).

- **Email Account** – Applicable if **Email Service** is set to **Email Accounts**. Choose the email account to use when sending outgoing emails.

- **Escalation from Email Address** – Applicable if **Email Service** is set to **Email API**. Specify the Email Address to use for Email Escalations.

- **Email Outbox CC Address** – Choose an email account to CC emails to when sending outgoing emails.

- **Enforce Email Dialog** – Choose this option if you want to prompt the user to send an email from one of the **Email Templates** when exiting the Case card.

- **Delete Email Archive After** – Specify when to delete the records in the Email Archive.

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

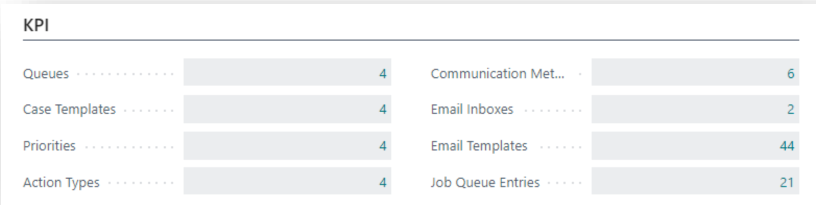


Figure 4-4

4.2 Queues

A Queue in SD Case Manager is a grouping of Cases. Using Queues, you set up flexible user-definable workflows (using Statuses and Action Types) for Cases logged within the Queue. An example of a Queue could be a Ticketing System Queue or a Customer Complaint Queue.

With each Queue you can set up Statuses and assign and update the Statuses on the Case as it progresses through the Queue's workflow. Cases can move between Queues. You can also set up Action Types that allow you to define and log Actions for a Case. You can then assign these Actions to an Assigned User.

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to Users Assigned to incomplete Case Actions; to Managers; and to Watchers of the Case. Escalation Rules can also be defined to add Watchers to a Case.

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

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

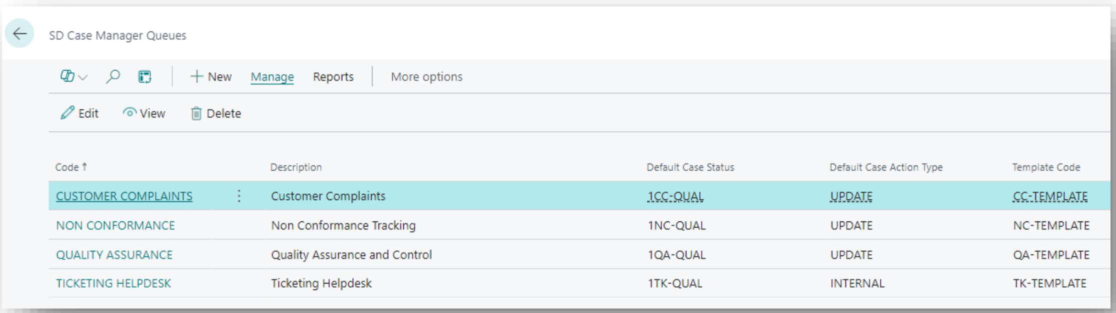


Figure 4-5

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

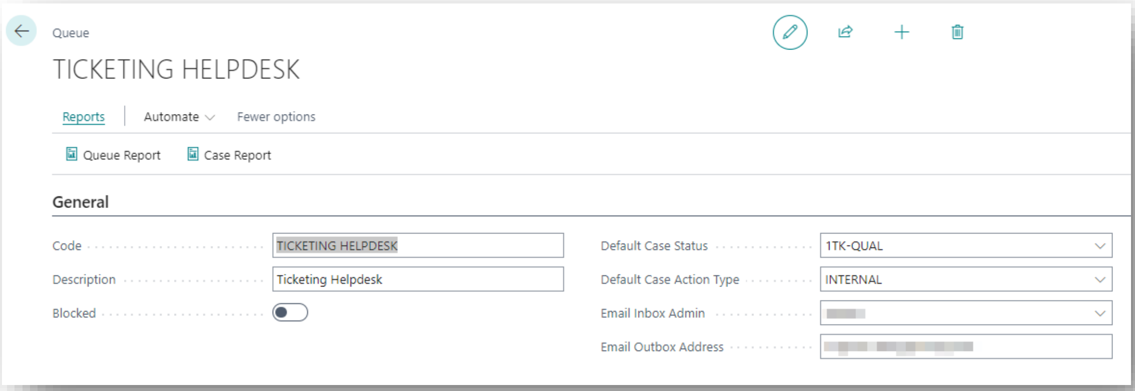


Figure 4-6

- **Code** – Enter a unique code to identify the Queue.
- **Description** – This is a user-defined description of the Queue.
- **Blocked** - A Queue can be set to Blocked by selecting this checkbox. Setting a Queue to blocked prevents any new Cases from being created for the blocked Queue. You cannot create any new Actions nor update existing Actions for Cases in the blocked Queue. Escalation Rules for Cases within the Blocked Queue will still be executed.
- **Default Case Status** - This field specifies the default Status that a Case will initially be set to when created within this Queue. The Case Status allows you to specify if the State of the Case Status on the Case is defined as Inactive or Active, or, if the Case Status on the Case is defined as Closed. Statuses are defined for each individual Queue on the Queue Card in the **Statuses** FastTab (see below).
- **Default Case Action Type** - The Default Case Action Type specifies the default Action Type for Actions that are logged against Cases within this Queue.
- **Email Inbox Admin** – Enter a User to default to the Manager field when creating a Case from an email that has a Queue Code specified on the **Email Inbox Pending** list.
- **Email Outbox Address** – Chose the email outbox to use when sending emails from Cases logged in this Queue. Applicable if the **Email Service** has been set to **Email API** on the **SD Case Manager Setup** card.

Expand the **Projects** FastTab (*Figure 4-7*):

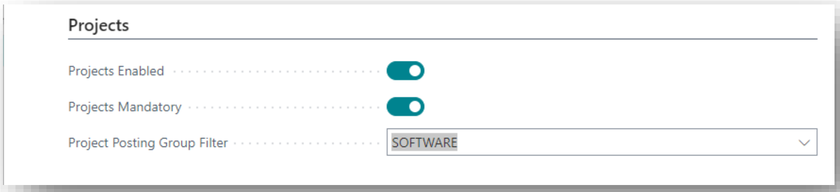


Figure 4-7

- **Projects Enabled** - To track profitability and to track costs, Cases can be linked to Projects. Specifies whether to enable projects on Cases. If enabled, a customer no and project code are displayed on the Case.

- **Projects Mandatory** – Specifies if a Project must be selected on the Case card before a Case can be saved.

- **Project Posting Group Filter** – Choose the project posting group that you want to filter down the project codes to on the Case.

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

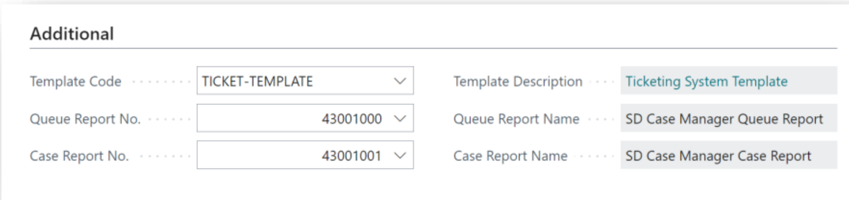


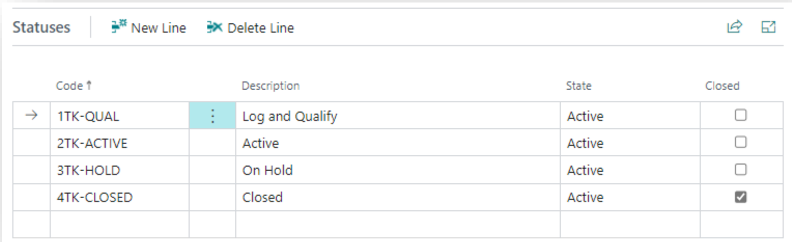
Figure 4-8

- **Template Code** - Defining a Case Template allows you to specify Template Actions to automatically apply to Cases created in the Queue.

- **Queue Report No.** – Choose from a list of Reports. SD Case Manager has a 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.

- **Case Report No.** - Choose from a list of Reports. SD Case Manager has a pre-configured Case Report, **SD-CSM Case Report** (ID **43001001**). The Case Report can be run from the Queue List or from the Queue Card.

Expand the **Statuses** FastTab (*Figure 4-9*):


Statuses | New Line | Delete Line

Code ↑	Description	State	Closed
1TK-QUAL	Log and Qualify	Active	☐
2TK-ACTIVE	Active	Active	☐
3TK-HOLD	On Hold	Active	☐
4TK-CLOSED	Closed	Active	☑

Figure 4-9

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

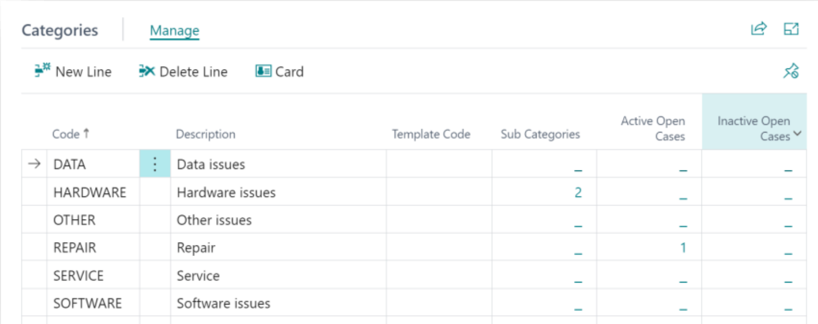
- **Code** – This is a unique code that identifies this Status.

- **Description** – This is a user-defined description of the Status.

- **State** – Defines the State that this Status will have. Options are **Active**, **Inactive**. The Status Code of a Case is manually updated in the Case Card.
  - **Active** - The State of this Status is Active. For those Cases with this Case Status, the State of the Case is defined as Active.
  - **Inactive** - The State of this Status is Inactive. For those Cases with this Case Status, the State of the Case is defined as Inactive.

- **Closed** - For those Statuses that have the Closed checkbox enabled, the Case Status on the Case is defined as Closed. When the Case Status on the Case is defined as Closed, you cannot create Case Actions for the Case.

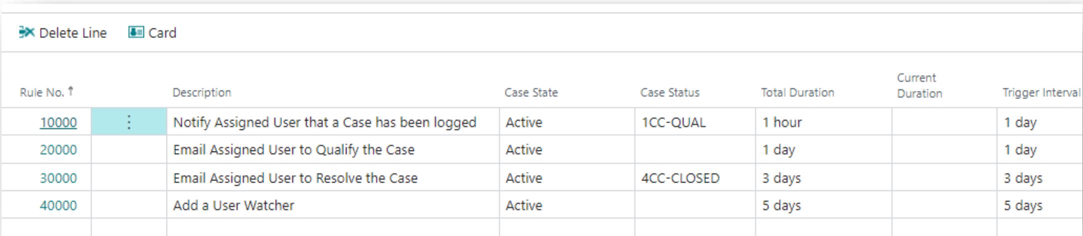
The **Categories** FastTab (*Figure 4-10*) displays the list of Categories assigned to the Queue and provides a means of classifying Cases within Queues. To access an existing Category, from the actions on the FastTab, select **Card**. To create a new Category, from the actions on the FastTab, select **New Line**. Please see the section on **Categories**.



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 4-10

The **Escalations** FastTab *(Figure 4-11)* is a list of Escalation Rules to apply to Cases within the Queue.



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

Figure 4-11

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to Users Assigned to incomplete Case Actions and to the Case Watchers. The Escalation Rules also enable you to add specified Watchers to Cases.

To edit an existing escalation, from the actions on the FastTab, select **Card**. To create a new escalation, from the actions on the FastTab, select **New Line**. Please see the section on **Escalations**.

Expand the **Interaction Groups** *(Figure 4-12)*:

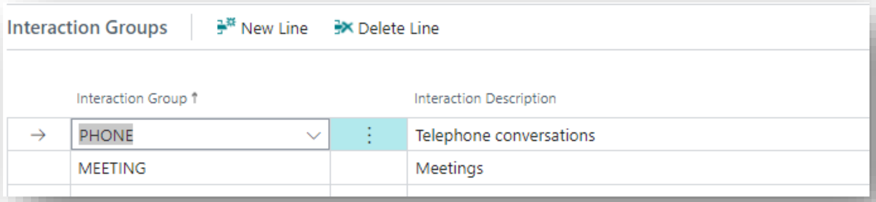


Figure 4-12

This is a list of the Interaction Groups you can select from when logging an interaction against a Case Action for a Case within this Queue. By defining an Interaction Group on the Queue Card, you can create Interaction Log Entries when a Case Action is created for a Case in the Queue.

- **Interaction Group** - Specify the Interaction Group that you want to use when logging an interaction for a Case Action for a Case within this Queue.

- **Interaction Description** - Displays the Description for the chosen Interaction Group.

Expand the **Default Case Watchers** to see a list of the default Watchers to auto-assign to Cases created in this Queue. *(Figure 4-13)*:

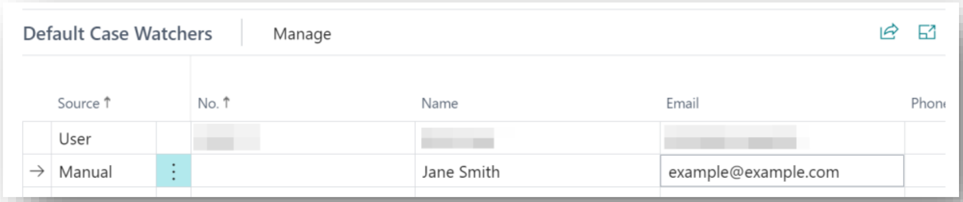


Figure 4-13

A Watcher can be either a Business Central User (a User Watcher) or a Watcher's details can be entered manually. Escalation Rules can be defined on the Queue Card and, when run, will escalate Cases by notifying or emailing the Watchers of the Case, or by adding specified Watchers to the Case.

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

4.3 Action Types

Action Types allow you to define user-definable Action Types for Cases. Action Types are defined globally in SD Case Manager. When creating an Action for a Case, you specify the Action Type for which you are logging the Action. You can set the **Default Case Action Type** for a Case on the Queue Card.

The Action Types List *(Figure 4-14*) is accessed from the **SD Case Manager Setup** by selecting **Action Types** in the **Related** menu group.

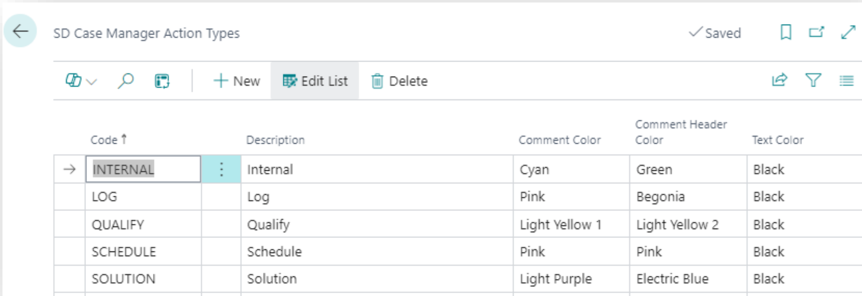


Figure 4-14

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

4.4 Categories

Categories and Sub-Categories are used in SD Case Manager as a means of classifying and grouping Cases within Queues. The Categories Card is accessed from the **Categories** FastTab in each individual Queue Card. To access an existing Category, from the FastTab, select **Card.** To create a new Category, from select **New Line** (*Figure 4-15*).

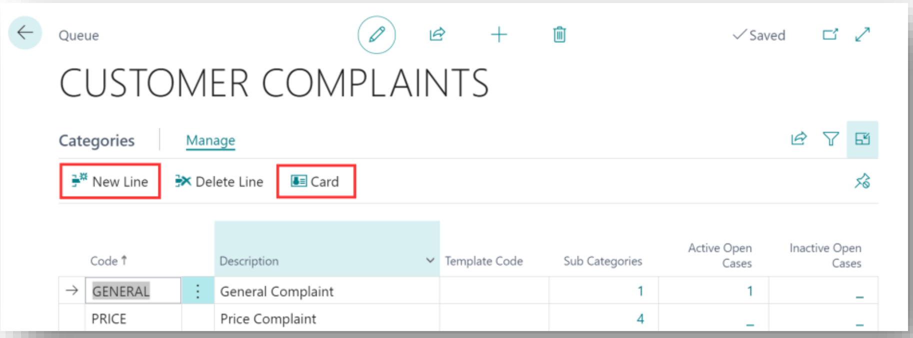


Figure 4-15

The **General** FastTab has the following fields (*Figure 4-16*):

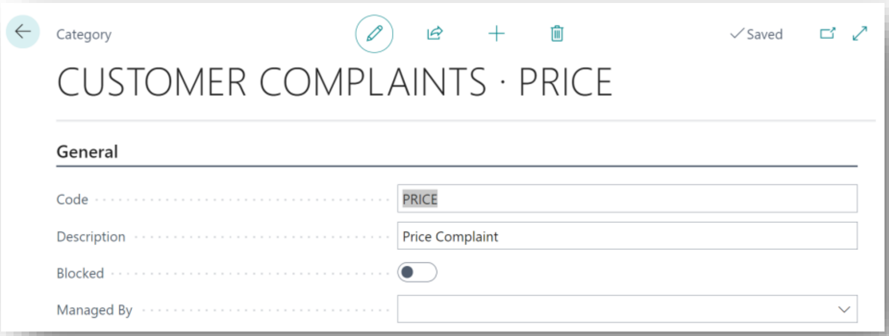


Figure 4-16

- **Code** - A unique code to identify this Category. You can specify the Category for the Case in the Case Card. (Please see the section on **Cases**).

- **Description** - A user defined description of the Category.

- **Blocked** - Setting a Category to blocked prevents this Category from being assigned to new or existing Cases.

- **Managed By** - Defaults the **Managed By** field on the Case to this User when the Category is selected in the Case Card and the Managed By on the Case Card is blank.

Expand the **Additional** FastTab (*Figure 4-17*):

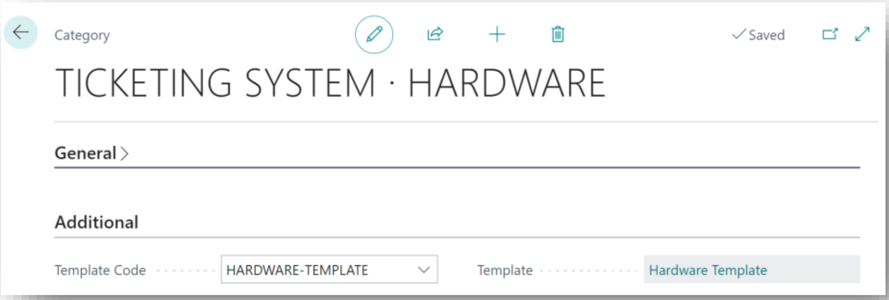


Figure 4-17

- **Template Code** - The Template Code for the Category. Defining a Template Code allows you to specify certain Template Actions which are applied to each Case in the Queue when the Case is set to this Category.

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

In the **Sub Categories** FastTab you define the Sub Categories within the Category. (*Figure 4-18*):

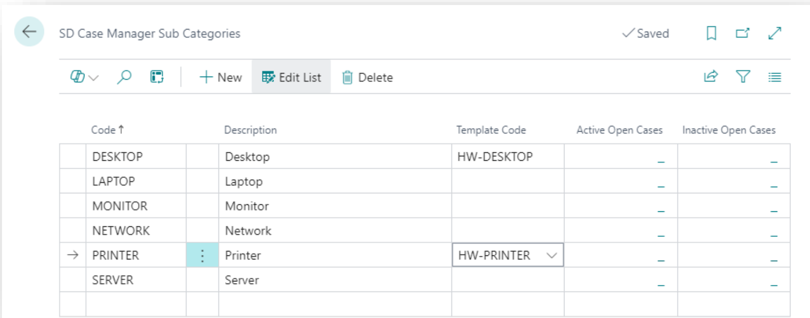


Figure 4-18

- **Code** - Enter a unique code to identify this Sub Category. You can set the Sub Category for the Case in the Case Card.

- **Description** - Enter a user-defined description of the Sub Category.

- **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.

- **Active Open Cases** - A count of Active Open Cases set to the Sub Category Code.

- **Inactive Open Cases** - A count of the Inactive Open Cases that have this Sub Category Code.

4.5 Escalations

Escalation Rules can be created for each Queue and, when run, are applied to each Case in the Queue that meet the Escalation Rule's criteria. Each Escalation Rule has conditions that must be met before its corresponding Escalation Action is run. When fired, these Escalation Rules allow you to escalate Cases by sending emails or notifications to the Users Assigned to incomplete Case Actions and to the Case Watchers. The Escalation Rules also enable you to add specified Watchers to Cases (*Figure 4-19*).

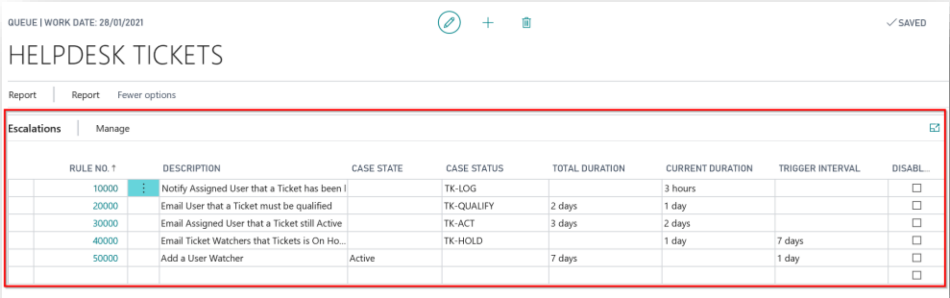


Figure 4-19

The **Escalation Card** is accessed from the **Escalations** FastTab in each individual **Queue Card**. To access an existing Escalation Rule, from the actions on the FastTab, select **Card**. To create a new Escalation Rule, from the actions on the FastTab, select **New Line** (*Figure 4-20*).

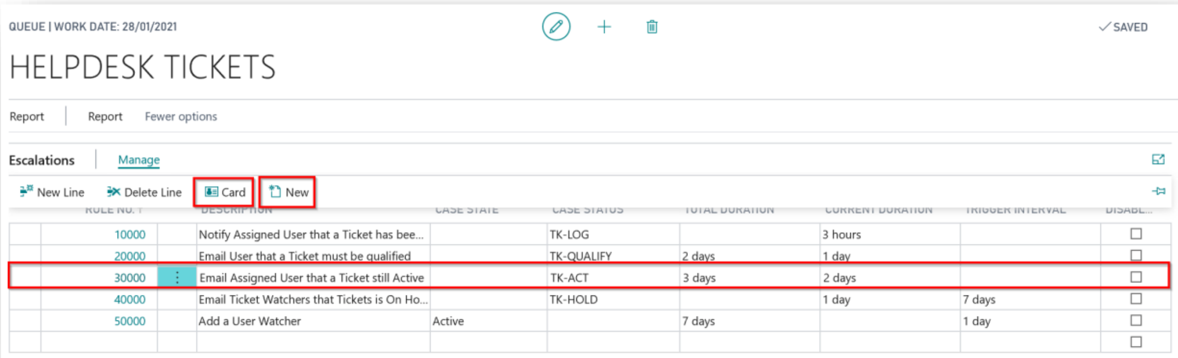


Figure 4-20

In the Escalation Card, expand the **General** FastTab Group (*Figure 4-21*):

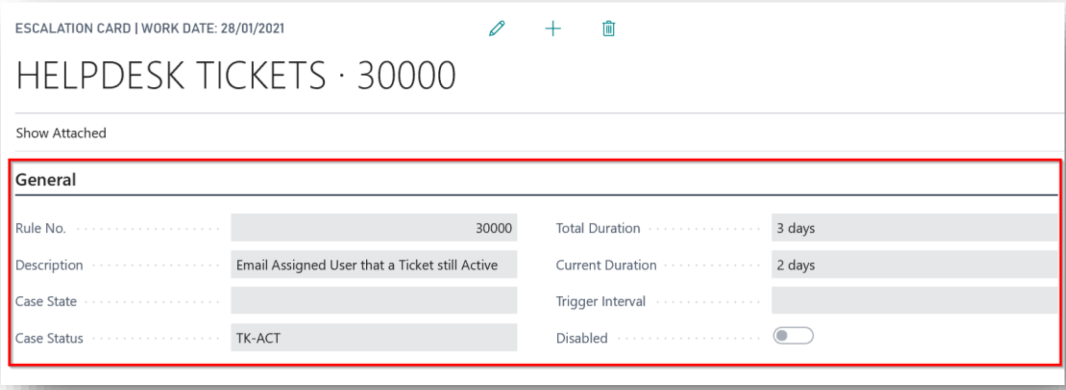


Figure 4-21

- **Rule No.** – This field is an automatically generated No. to identify this Escalation Rule.

- **Description** – Enter a user-defined description to describe the Escalation Rule.

- **Case State** – This field specifies the State of the Status Code on the Case that must be met for this condition of the Escalation Rule to be considered true. Options are **Active**, **Inactive**. (The Escalation Rule condition also checks the criteria specified in the Case Status, Total Duration, Current Duration, Trigger Interval and Disabled fields).
  - **Active** - The Case must have a Status Code that has its State set to Active.
  - **Inactive** - The Case must have a Status Code that has its State set to Inactive.

  If you specify a Case State in the Escalation Rule, you cannot specify a Case Status.

- **Case Status** - Specifies the Case Status. The Case must be set to this Case Status for this condition of the Escalation Rule to be considered true. (The Escalation Rule condition also checks the criteria specified in the Case State, Total Duration, Current Duration, Trigger Interval and Disabled fields).

  If you specify a Case Status in the Escalation Rule, you cannot specify a Case State.

- **Total Duration** - Enter the Total Time (expressed as greater than, or equal to this Total Duration) that the Case must be in the specified State, or Status, for this condition of the Escalation Rule to be considered true. The Total Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of the Status or State on a Case.

- **Current Duration** - Enter the Current Time (expressed as greater than, or equal to this Current Duration) for which the Case must be currently in the specified State or Status for this condition of the Escalation Rule to be considered true. The Current Duration of the Status and the State on Cases are calculated by stamping a Case Status Log table on change of the Status or State on a Case.

- **Trigger Interval** - Enter the time interval for which you want to wait before the Escalation Actions are repeated. This allows you to control how often you want the Escalation Actions to fire, for example, you may have a Job Queue set up to automatically Execute Escalation Rules every day, yet you only want the mails and the notifications to be sent every 3 days.

- **Disabled** - Select this checkbox to disable the Escalation Rule.

Expand the **Actions** FastTab (*Figure 4-22*). This is a list of the actions that you want to happen for those Cases within the Queue when the Escalations are run.

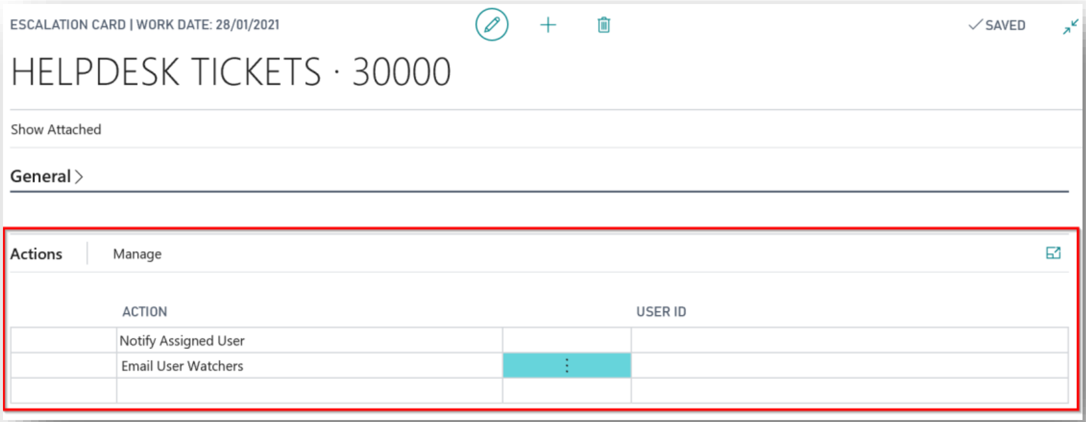


Figure 4-22

- **Action** – This field allows you to specify the Action that you want to happen for those Cases within the Queue where the Escalation Rule criteria are met. Options are **Notify Assigned User**, **Notify User Watchers**, **Add a User Watcher**, **Email Assigned User**, **Email User Watchers**, **Email Watchers**.
    - **Notify Assigned User** –A notification is sent to the Assigned User of the Open Actions on the Case. The Assigned User of the Case Action is specified in the **Actions** FastTab on the Case Card. A note is created for the Assigned User with an attachment/link to the Case.
    - **Notify User Watchers** – A notification is sent to the User Watchers of the Case. The User Watchers of the Case are specified in the **Case Contacts** FastTab on the Case Card. A note is created for the User Watcher with an attachment/link to the Case.

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

- **User ID** – This field is relevant only where the **Action** is set to **Add a User Watcher**. This field allows you to select the Dynamics 365 Business Central User ID, from the Users table, for the User that you want to Add as a User Watcher.

4.5.1 Escalation Notifications

SD Case Manager allows you to define escalation rules with an action to Notify Assigned User and an action to Notify User Watchers. When triggered, a notification is sent to the Assigned User of the Open Actions on the Case and/or to the User Watchers of the Case. A note is created for the relevant user with an attachment/link to the Case.

SD Case Manager has an entry in the **My Notifications** list automatically entered and enabled on install (*Figure 4-23*).

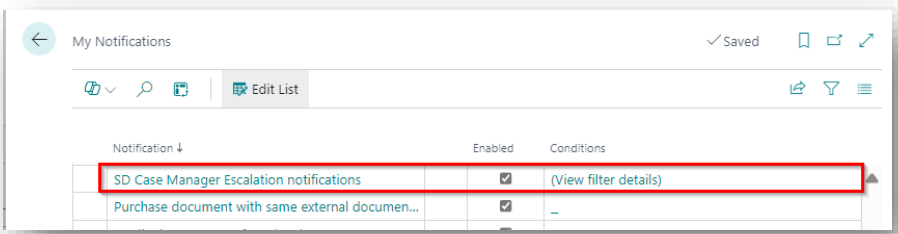


Figure 4-23

When the criteria of the Escalation Rule are met and the rule fires, these notifications and notes can be viewed by searching the Tell Me for **SD Case Manger Notifications** (*Figure 4-24*).

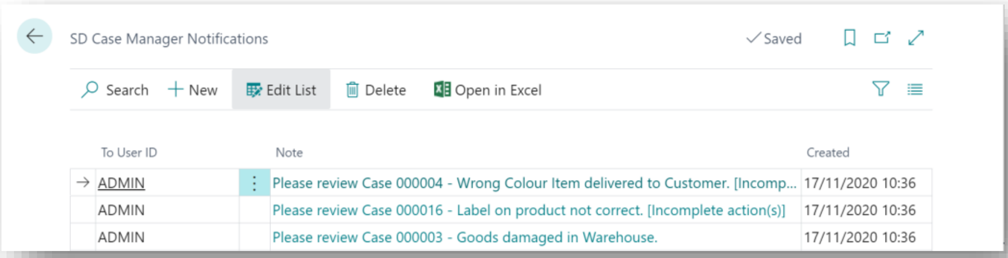


Figure 4-24

Selecting the Note URL link will open the Case Card (*Figure 4-254)*.

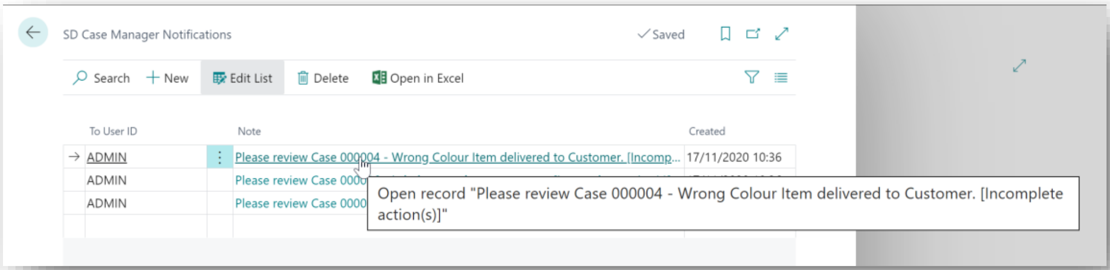


Figure 4-25

You will also see SD Case Manager escalation notifications in the **SD Case Manager Cases** list and can see any notes that have been created and attached to the Case (*Figure 4-26)*.

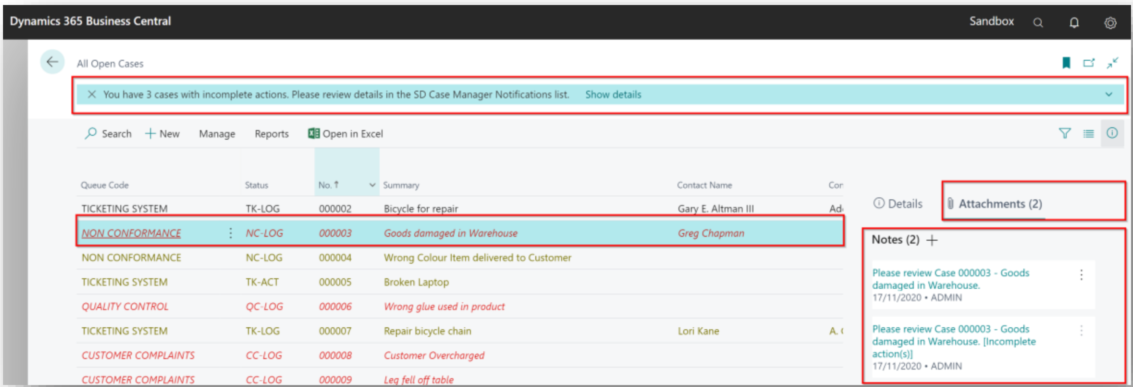


Figure 4-26

4.5.2 Executing Escalation Rules Manually

To execute Escalation Rules manually, from the **SD Case Manager Setup** in the **Process** menu group, select **Execute Escalation Rules** (*Figure 4-27*).

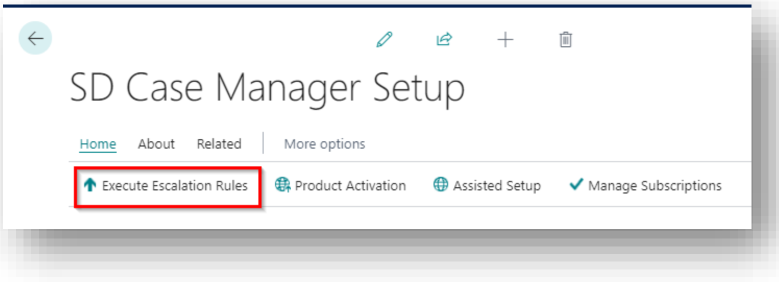


Figure 4-27

4.5.3 Executing Escalation Rules Automatically

The SD Case Job Queue Entries are used to Execute Escalation Rules automatically *(Figure 4-28)*.

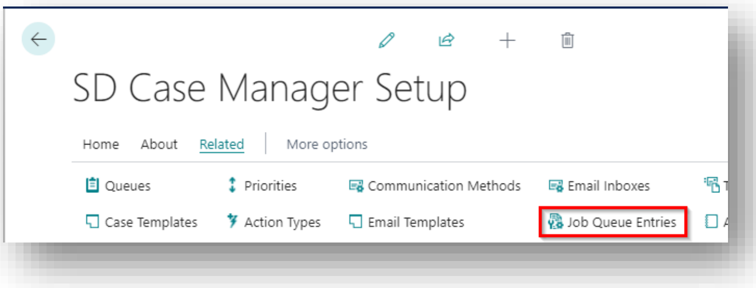


Figure 4-28

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

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

1. Navigate to the **SD Case Manager Setup** Page. In the **General** menu group, choose **Job Queues**.

2. In the **Job Queue Entries** List, create a **New** Job Queue Entry.

3. You are prompted to select the type of Job Queue that you want to set up *(Figure 4-29)*.

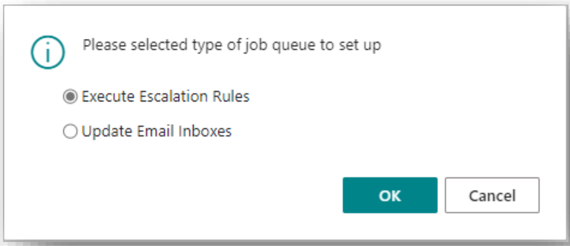


Figure 4-29

4. In the Job Queue Entry Card, enter a **Description.** Update the **Schedule** and **Recurrence** details in the Job Queue Entry Card as required.

5. Choose **OK** to save the Job Queue Entry.

6. When you have reviewed your Job Queue Entry, set the Status of the Job Queue Entry to **Ready**.

According to your Schedule Details for the Job Queue Entry, the Job Queue Entry will automatically Execute Escalation Rules for the Cases.

4.6 Priorities

A Priority provides a means to visually organise or prioritise Cases. When setting up a Priority, you select the Microsoft Dynamics 365 Business Central Style Property that you want to associate with the Priority. You can then assign a Priority to a Case and the Priority's associated style formatting is applied to records in the Case Lists, in the My Open Cases list, and the Action Lists for those Cases that are associated with the individual Priority.

The Priorities List *(Figure 4-30)*. is accessed from the **SD Case Manager Setup Page.** From the menu, in the **Related** group, choose **Priorities**.

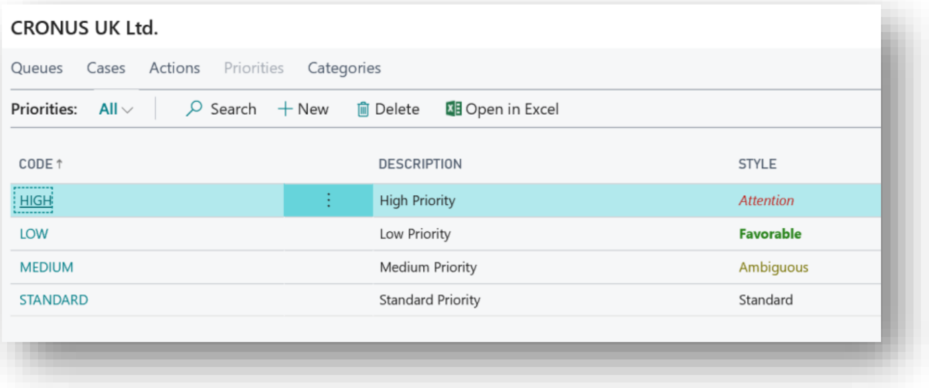


Figure 4-30

- **Code** - A unique code to identify this Priority. You can specify the Priority for the Case in the Case Card.
- **Description** - A user defined description of the Priority.
- **Style** - Select the style formatting that you want to apply to the Case records in the Case Lists, My Open Cases, and the Action Lists for Cases that are associated with this Priority.

4.7 Communication Methods

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

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

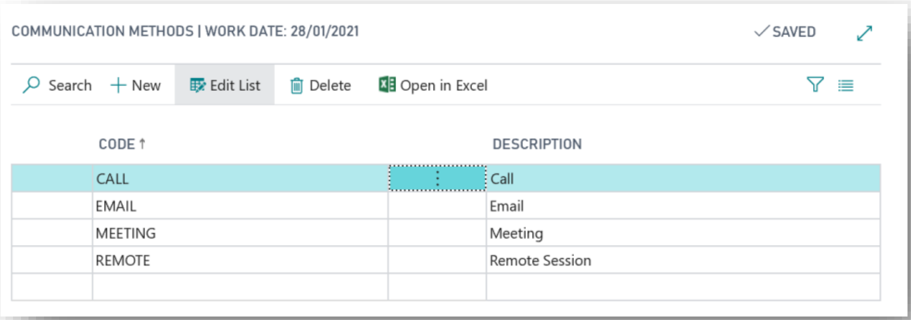


Figure 4-31

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

4.8 Case Templates

The Case Templates List (*Figure 4-32*) is accessed from the **SD Case Manager Setup** by selecting **Case Templates** from the **Related** menu group.

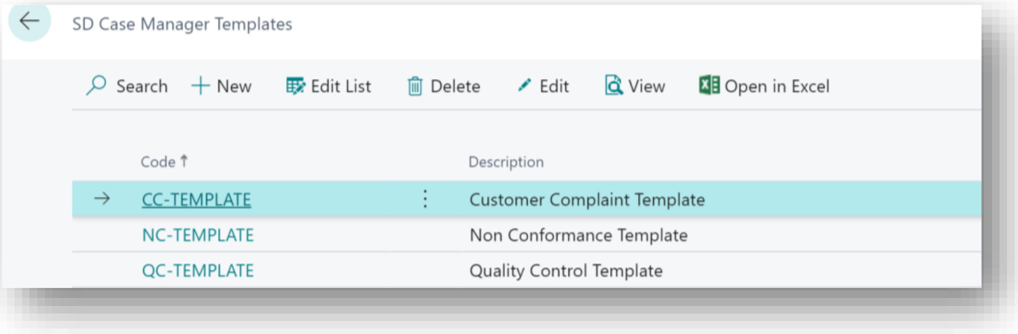


Figure 4-32

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

The Case Template Card contains the following fields (*Figure 4-33)*:

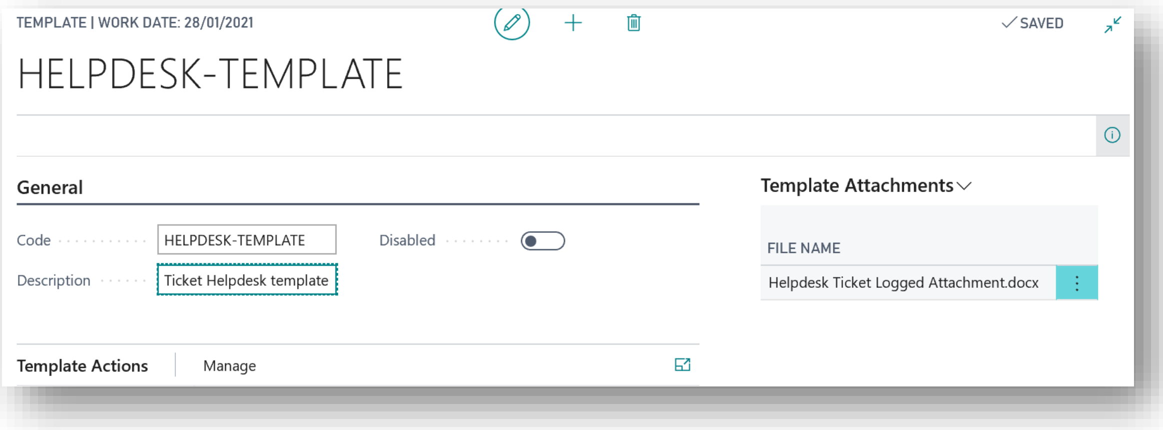
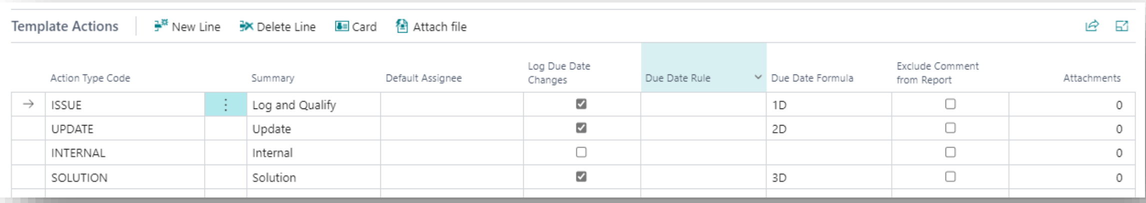


Figure 4-33

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

Expand the **Template Actions** FastTab (*Figure 4-34)*. 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.


Template Actions | New Line | Delete Line | Card | Attach file

Action Type Code	Summary	Default Assignee	Log Due Date Changes	Due Date Rule	Due Date Formula	Exclude Comment from Report	Attachments
ISSUE	Log and Qualify		☑		1D	☐	0
UPDATE	Update		☑		2D	☐	0
INTERNAL	Internal		☐			☐	0
SOLUTION	Solution		☑		3D	☐	0

Figure 4-34

- **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 the change was made to the due date on the Action.
- **Due Date Rule** – Select a due date rule to automatically update due dates on the Case Actions as the Actions on the Case are created or completed. This field is used in conjunction with the **Due Date Formula** field to update the due date on the Action. Options are **<blank>**, **From Create**, **Last Action Due**, **Last Action Complete**.
- **Due Date Formula** - Enter the Due Date Formula for SD Case Manager to use to determine the Due Date for the Template Action created on the Case Card.
- **Exclude Comment From Report** - Choose this option to exclude the action comment from the Case Report.
- **Attachments** - A flowfield count of the Files attached to the Template Action.

To attach files to a Template Action, select the **Attach File** Action from the actions in the **Template Actions** FastTab. When a Template Action is created on the Case, the file will be attached to the Case Action. To access the **Template Actions Card**, select **Card** from the actions in the **Template Actions** FastTab (*Figure 4-35*).

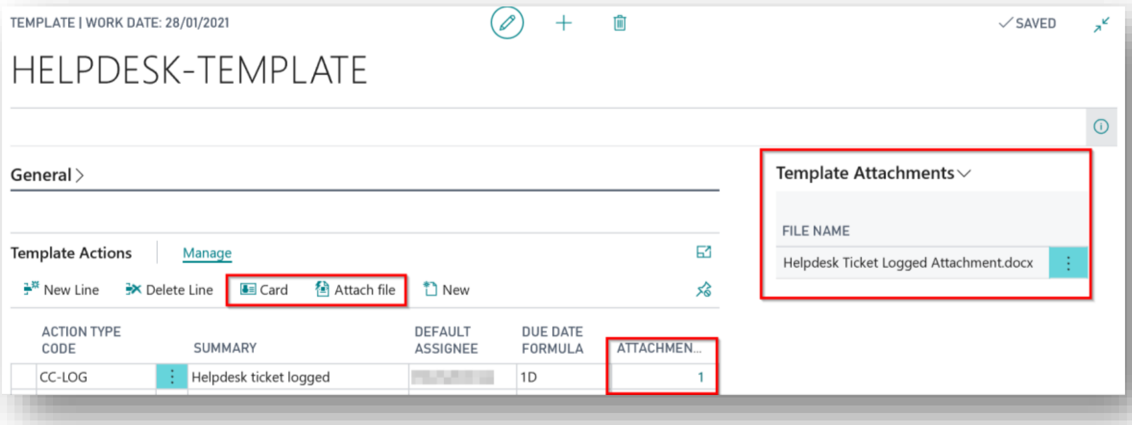


Figure 4-35

In the Template Action Card, expand the **General** FastTab (*Figure 4-36*):

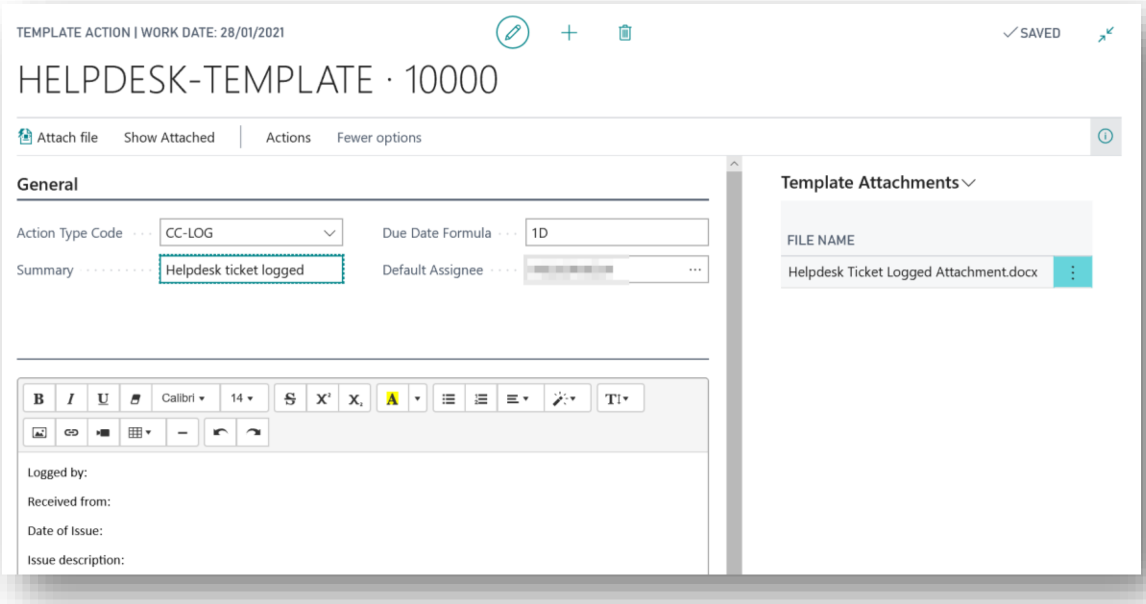


Figure 4-36

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

4.9 Cases

A Case provides a means of logging and tracking various issues and items. Cases can encompass various and multiple entities such as customer complaints, helpdesk issues, or internal and external company processes (*Figure 4-37*).

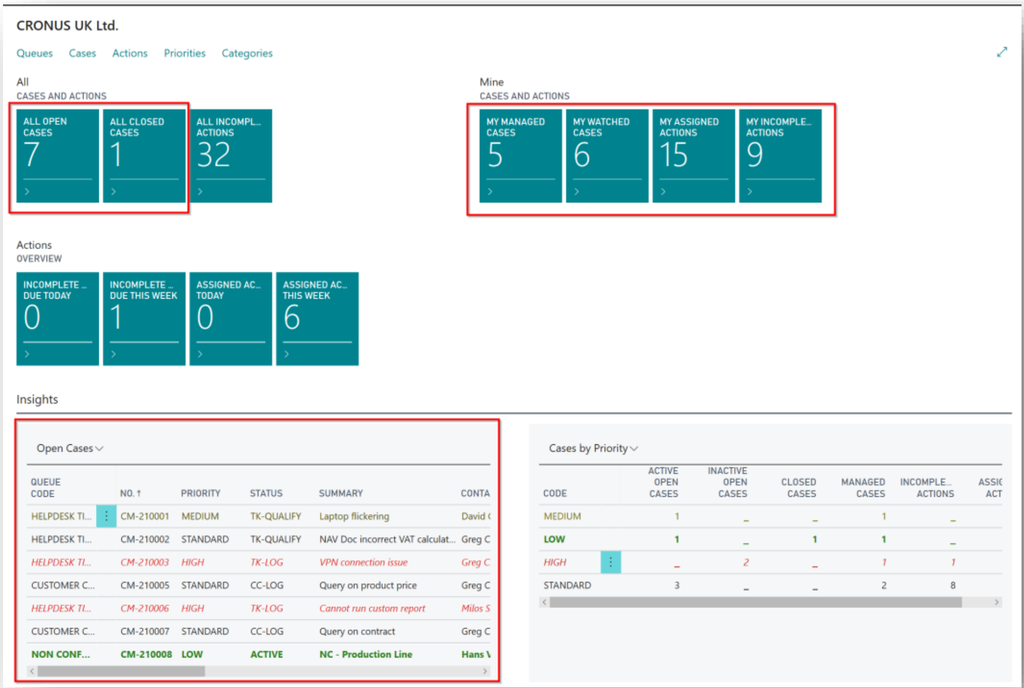


Figure 4-37

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

Users can update and progress the Case through the user-definable workflow as defined in the Queues and can log and update Actions against the Case and assign these Actions to an Assigned User.

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

To create a Case from an email you monitor the **Email Inboxes**, which are accessed from the **Pending Inbox Emails** cue in the **SD Case Manager Role Centre**. To setup the email inboxes to monitor and scan the inbound emails used to log and update a Case see the section on **Email Inboxes**.

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

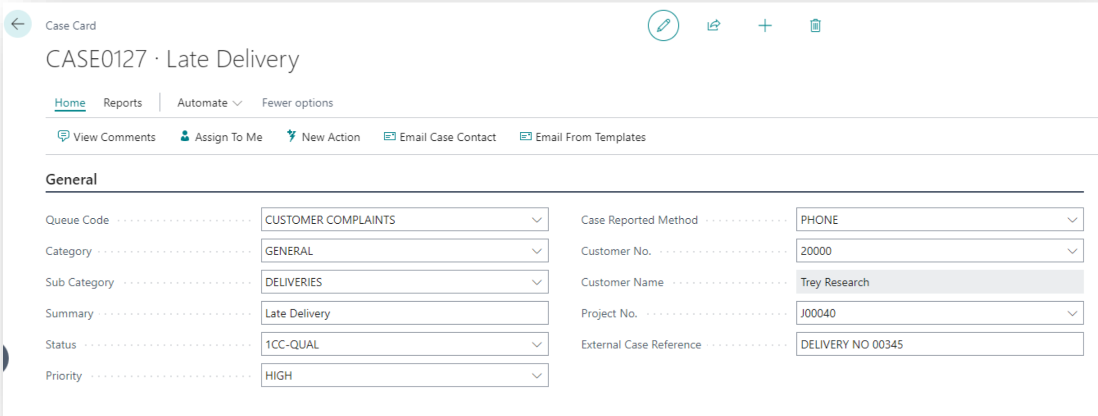


Figure 4-38

- **No.** –This field uses the **No. Series** field specified on the **SD Case Manager Setup**.
- **Queue Code** – Specifies the Queue that the Case is in currently. Select a Queue from a list of existing Queues in SD Case Manager.
- **Category** – This field specifies the Case Category. Select from a list of existing Categories. A Category provides a means of classifying Cases.
- **Sub Category** – This field specifies the Sub Category for the Case. Select from a list of existing Sub-Categories. A Sub Category provides a means of further classifying Cases.
- **Summary** – Enter a user-defined description of the Case.
- **Status** –Select from a list of existing Statuses defined for the current Queue Code. Case Statuses allow you to specify if the State of the Case Status is defined as Inactive or Active, or, if the Case Status on the Case is defined as Closed.
- **Priority** – This field defines the Priority for the Case. A Priority provides a means to organise or prioritise Cases in SD Case Manager.
- **Case Reported Method** – Select from a list of Communication Methods.
- **Customer No**. – Displays if the Projects Enabled is enabled on the Queue card. Specifies the customer who this Case is for.

In the **Customer Card**, choose the **Default Watchers** action to specify the Customer Contacts you want to add as default watchers to the Case whenever the Customer No. is chosen on the Case.

- **Customer Name** – The name of the customer.

- **Project No** - Displays if the Projects Enabled is enabled on the Queue card. Specifies the Project No for the Case.

- **External Case Reference** - Specifies a document number that refers to the customer's numbering system.

Expand the **Contacts** FastTab (*Figure 4-39*):

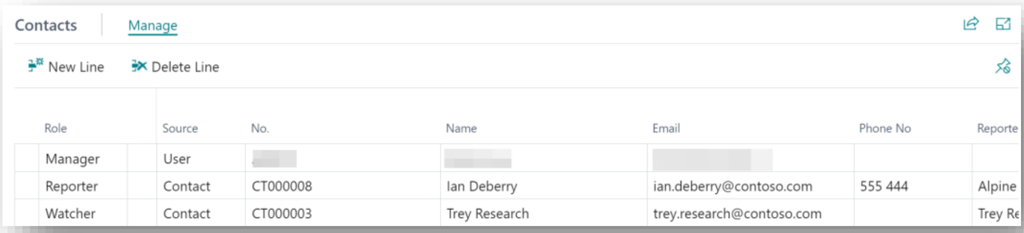


Figure 4-39

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

- **Source** – Choose from where to select the contact's details. Options are **User**, **Contact** or **Manual.** The Case Contact details can come from the User table, the Contact table or by manual input. The **Source** of the **Manager** role must be **User**.

  If a Customer No. is specified on the Case, the contact list filters down to the customer's contacts.

  If a Customer No is not specified on the Case, and a Contact is chosen, the Customer No. is populated with the Customer associated with the Contact.

Expand the **Actions** FastTab (*Figure 4-40)*. This is a list of all the Actions created and logged against the Case.

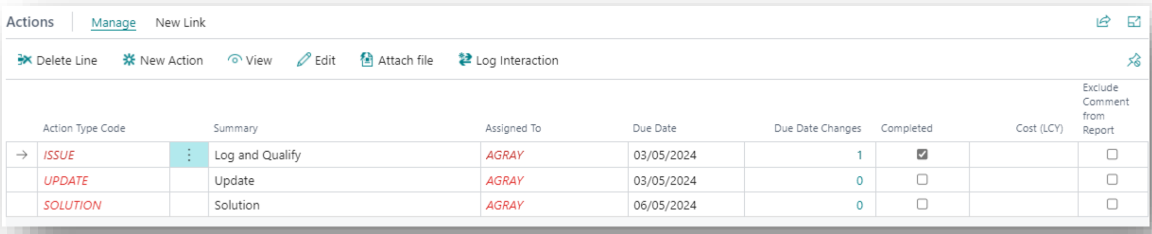


Figure 4-40

- **Action Type Code** – Specifies the code for the Action Type.
- **Summary** - A user defined description of the Action.
- **Assigned To** - The User that the Action is assigned to.
- **Due Date** – The date that the Action is due.
- **Due Date Changes** – A flowfield count of any changes made by users to the Due Date on the Action.
- **Completed** - Indicates if the Action is marked as completed.
- **Cost LCY** - the Cost LCY that was specified on the Action.
- **Exclude Comment From Report** - Choose this option to exclude the action comment from the Case Report.

To log a Case Action, select **New Action**. Existing Case Actions can be edited by choosing **Edit** (*Figure 4-41)*.

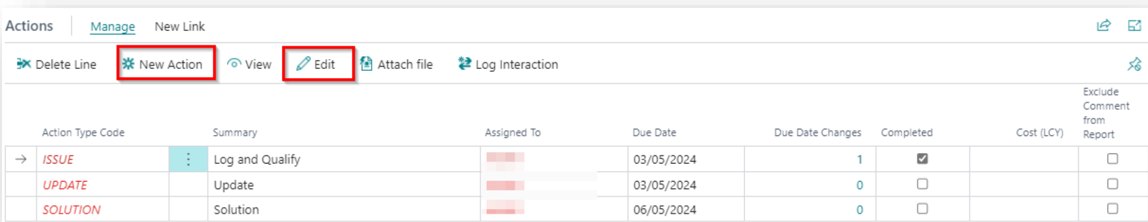


Figure 4-41

When you create or edit a Case Action, you can choose the actions below (*Figure 4-42*):

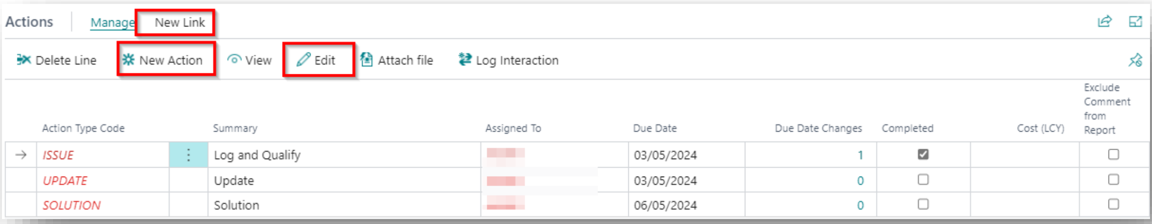


Figure 4-42

- Attach a file to the Action by selecting **Attach File** and browsing to the relevant file(s).
- Log an Interaction for the Action by the **Log Interaction** action. To Log an interaction for the Action you must have an Interaction Group specified in the **Queue Card**.

- Link the Action to a specific record in Business Central by selecting the **New Link** menu group and then the required action to quickly link to either Customer, Item, Vendor, or several other pre-defined Business Central Transactions. You can also choose to create a custom link to a record by choosing Custom (*Figure 4-43*) and selecting the Business Central table that you want to link to the Action.

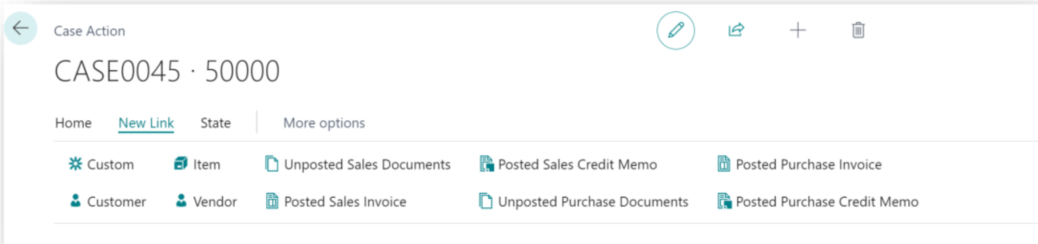


Figure 4-43

To mark the Case Action as **Completed**, to **Re-open** a completed Case Action or to **Cancel** a Case Action, select the actions below from the **State** menu group (*Figure 4-44).*

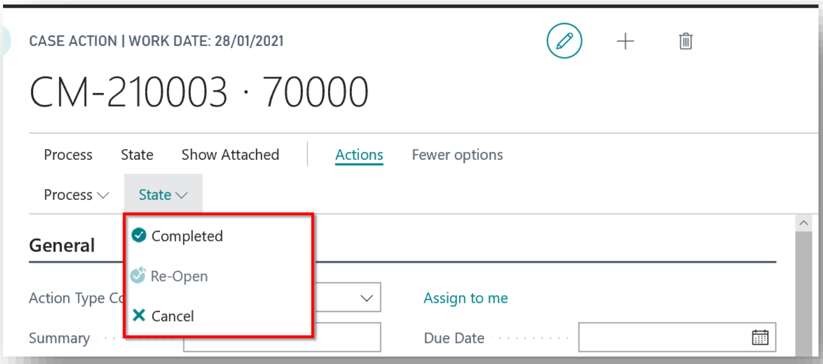


Figure 4-44

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

4.10 Email Templates

The Email Templates List is accessed from the **SD Case Manager Setup** by selecting **Email Templates** from the **Related** menu group. Email Templates allow you to define an email subject and body with variable placeholders and are used to send an email directly from the Case. To access an existing Template from the Template List, from the menu select **View** or **Edit**. To create a new Template, from the menu select **New** (*Figure 4-45*).

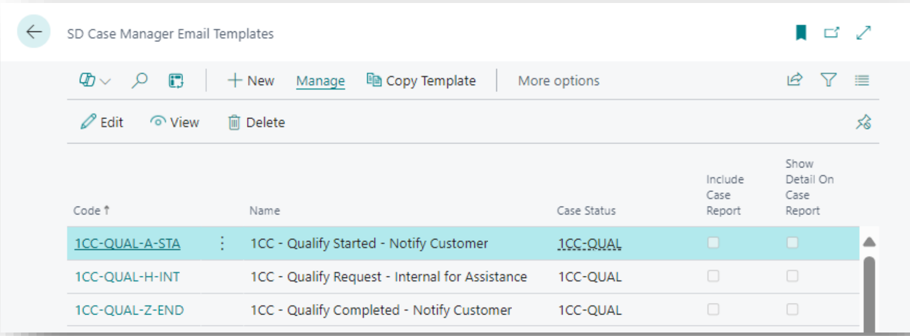


Figure 4-45

The Email Templates card contains the following fields (*Figure 4-46*):

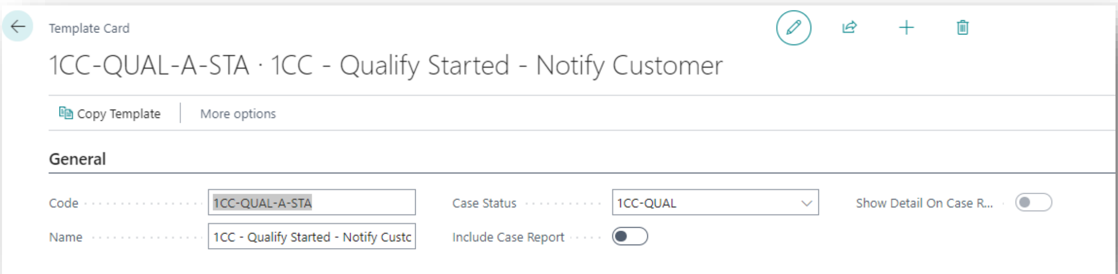


Figure 4-46

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

The subject of the email can include variable placeholder data from fields on the Case table. The body of the email can include variable data from fields on the Queue, Case and Case Action tables (*Figure 4-47*).

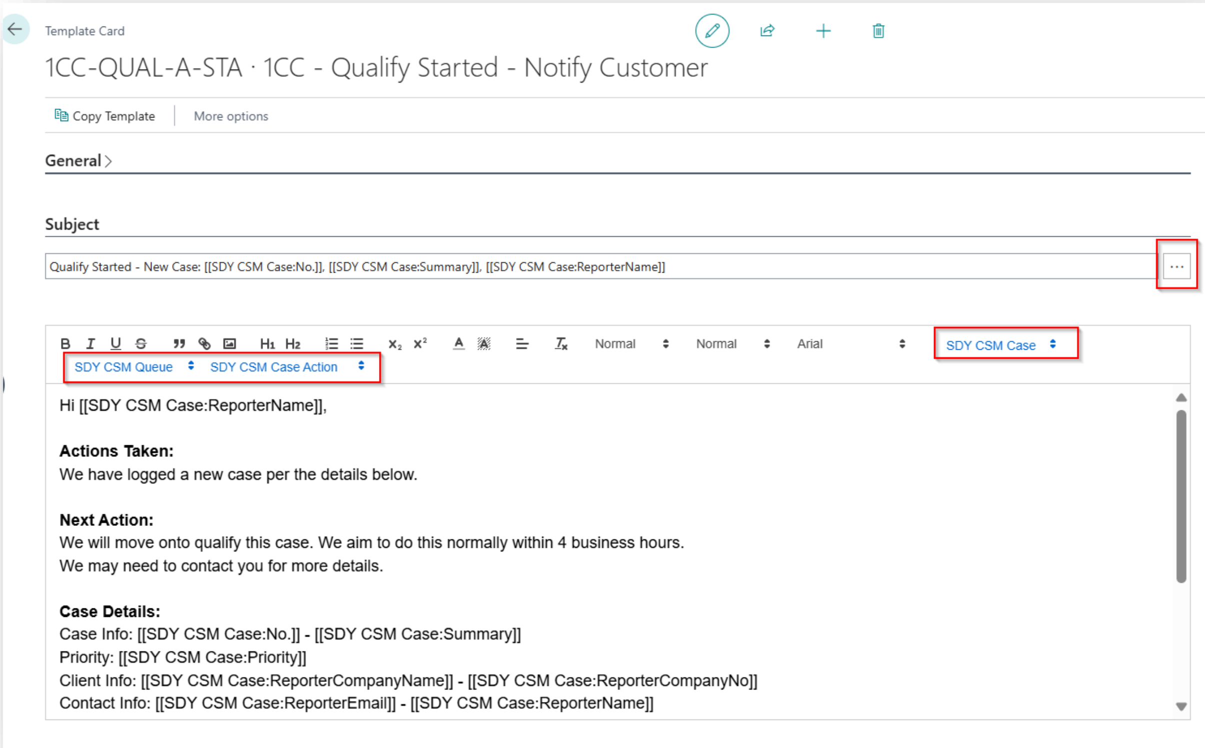


Figure 4-47

- **Subject** – Defines the text that you want to display in the Email Subject. Choosing the ellipses button prompts the user to select the Placeholder Source from fields in the Case table. A page opens listing the field names that can be used in the Subject.

- **Body** – Defines the text that you want to display in the Email Body. Choose the Placeholders drop down lists to add a place holder to include data from a field. The Placeholder Source is from fields in the Queue, Case and Case Action tables.

  A hyperlink is auto inserted in the outgoing email if the placeholder field on the Email Template has a URL structure.

  Note: Care must be taken when copying and pasting text into the Body from another source as hidden characters may cause issues when rendering the Body in the generated Drafts.

4.11 Email Inboxes

The **Email Inboxes** is accessed from the **SD Case Manager Setup** by selecting **Email Inboxes** from the **Related** menu group. Here you setup the email inboxes that you will monitor and scan for the inbound emails used to log and update a Case. To access an existing Email Inbox from the Email Inboxes List, from the menu select **View** or **Edit**. To create a new Email Inbox, from the menu select **New** *(Figure 4-48)*.

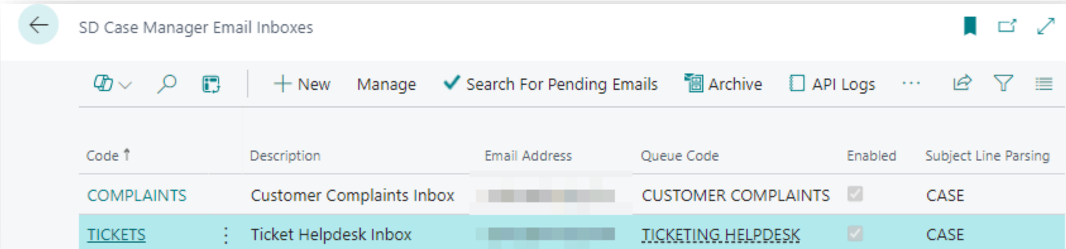


Figure 4-48

The Templates List contains the following fields *(Figure 4-49)*:

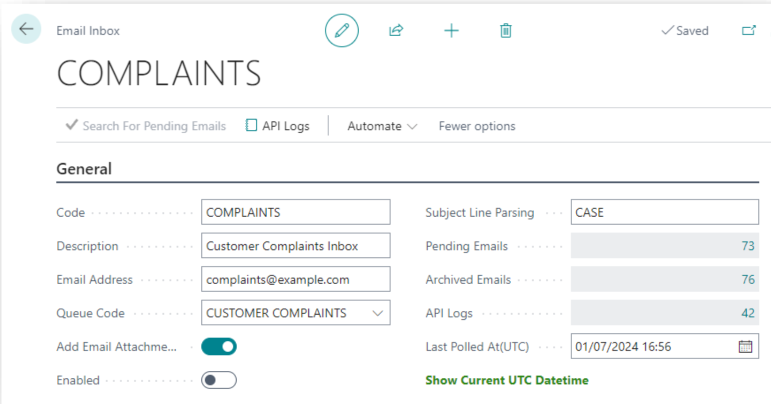


Figure 4-49

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

- **Add Email Attachments** – Switch this option on if you want to attach email attachments to the Case.

- **Enabled** - Select this checkbox to start monitoring the inbox.

- **Subject Line Parsing** – Enter a phrase that must exist in the email subject line used to identify the emails that are related to existing Cases. The search phrase in the subject line parsing used to find Cases in the monitored Email Inboxes is a Case sensitive search phrase. Punctuation characters such as commas and full stops are ignored in the Subject Line Parsing phrase.

- **Pending Emails** – A count of the emails in the inbox that are yet to be either used to create a Case or forced to archive if not relating to a Case.

- **Archived Emails** – A count of the emails in the inbox that have been archived.

- **API Logs** – A count of the API calls made to the Azure Portal App Email API.

- **Last Polled At (UTC)** – The UTC date/time that the inbox was last polled. On setup you can set this field to the date/time from when you want to begin scanning your inbox. You can also amend this date at any stage.

In the Conditions FastTab you can set up conditions to exclude certain emails from appearing in the Email Inbox Pending list *(Figure 4-50).* The Value field is not Case sensitive when searching the inbox.

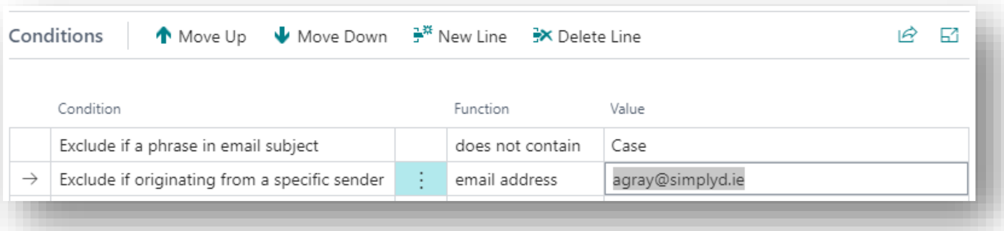


Figure 4-50

4.12 Email Inbox Pending

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

To create a Case from an email, choose the **Create a New Case** action (*Figure 4-51*).

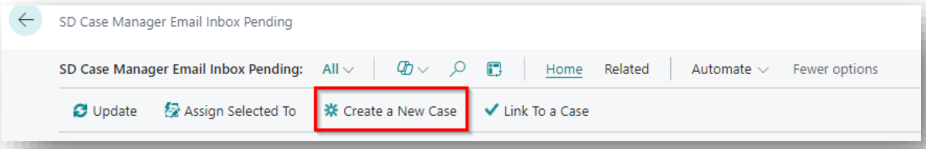


Figure 4-51

The **Create a New Case** Card opens (*Figure 4-52*).

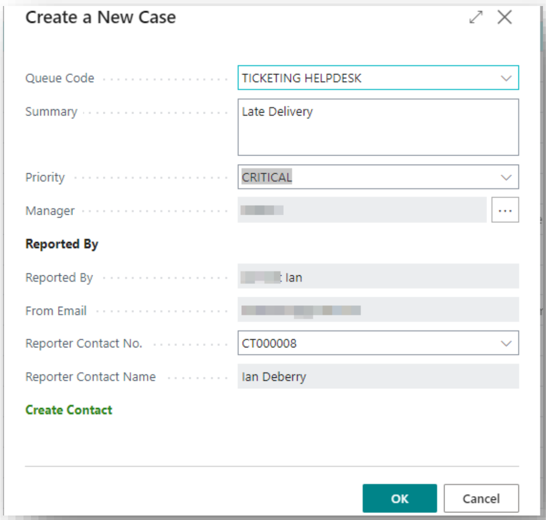


Figure 4-52

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

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

Choose **OK** to create the new Case (*Figure 4-53*). The Case is created, and the email is moved to the **Email Inbox Archive**.

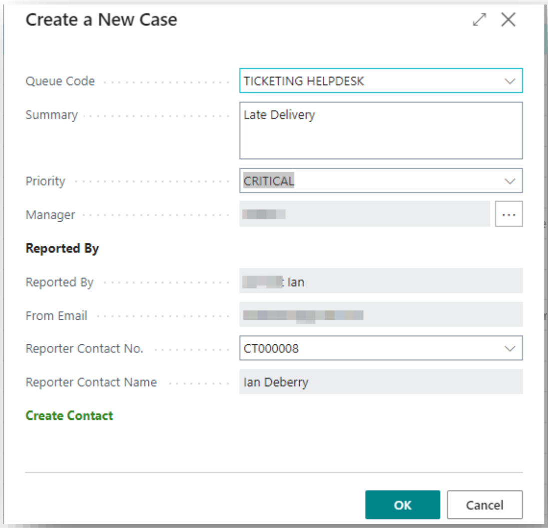


Figure 4-53

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

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

To manually link an email to a Case from an email choose the **Link To a Case** action (*Figure 4-54*).

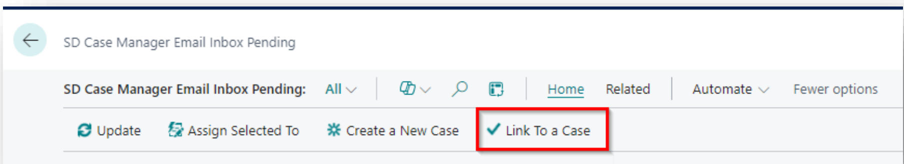


Figure 4-54

In the Inbox Pending there is a FactBox where you can see the email details (*Figure 4-55*).

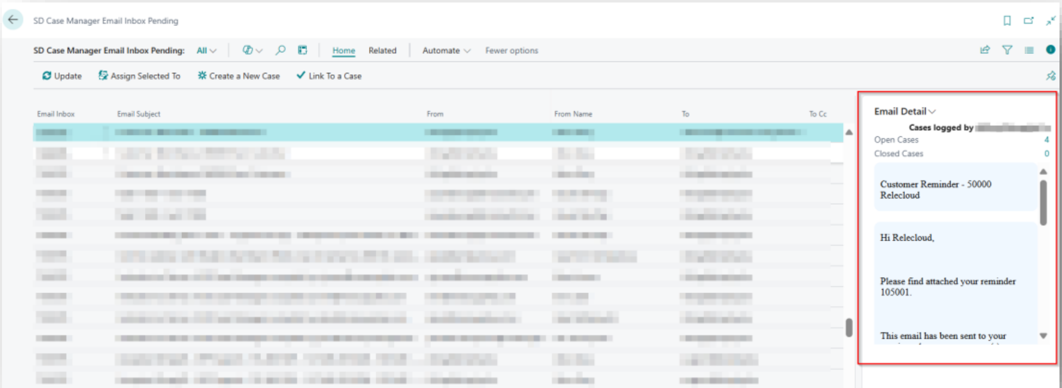


Figure 4-55

In the Related menu group there is also an action to open the email in the browser (*Figure 4-56*).

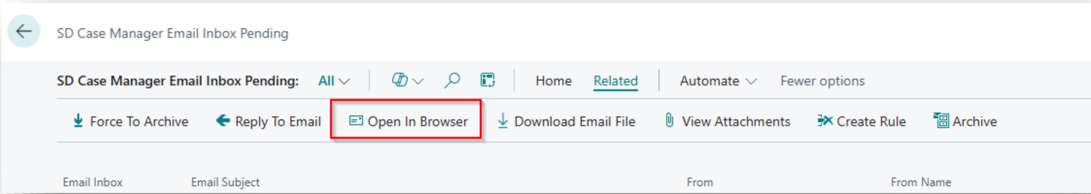


Figure 4-56

When choosing the Open In Browser action from the Email Inbox Archive, the email is opened in the logged in users email box. If the **Queue Email Address** on the **Email Inboxes** is different to the logged in user's email, the email cannot be found as the logged in user's email box is searched. However, you can open the email by choosing the **Download Email File** action, which downloads the email, and when the downloaded email file is opened, the user can reply to the email from their email box (*Figure 4-57*).

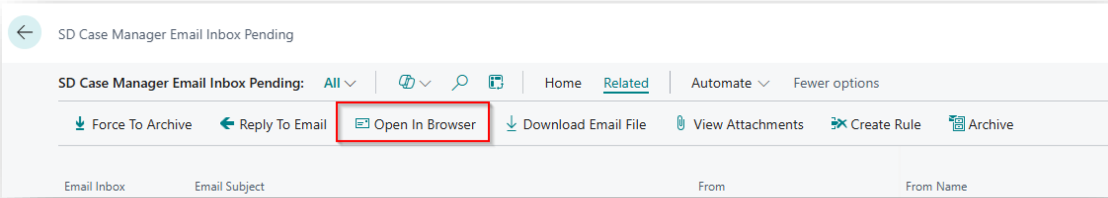


Figure 4-57

When a case is closed, and an email relating to the case is sent to the monitored inbox, the email is not auto matched to the case but remains in the Email Inbox Pending List to be actioned.

4.13 Email Inbox Archive

When a Case is created from an email, the email is moved to the **Email Inbox Archive**.

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

When a Case is manually linked to an email, the email is moved to the **Email Inbox Archive**.

In the **Case Details FactBox** on the **Case Card**, you can drill through on the **Emails** count to easily view the emails associated with the Case (*Figure 4-58*).

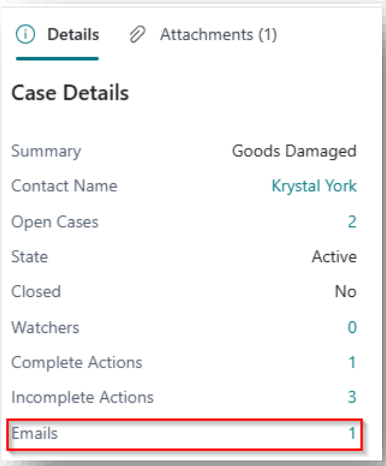


Figure 4-58

When choosing the **Open In Browser action** from **the Email Inbox Archive**, the email is opened in the logged in user's email box (*Figure 4-59)*.

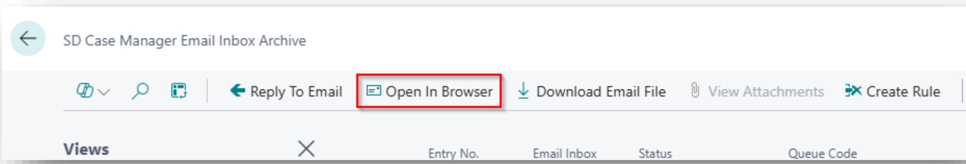


Figure 4-59

If the **Queue Email Address** on the **Email Inboxes** is different to the logged in user's email, the email cannot be found as the logged in user's email box is searched . However, you can open the email by choosing the **Download Email File** action, which downloads the email, opening the downloaded email file, the user can reply to the email from their email box (*Figure 4-60*).

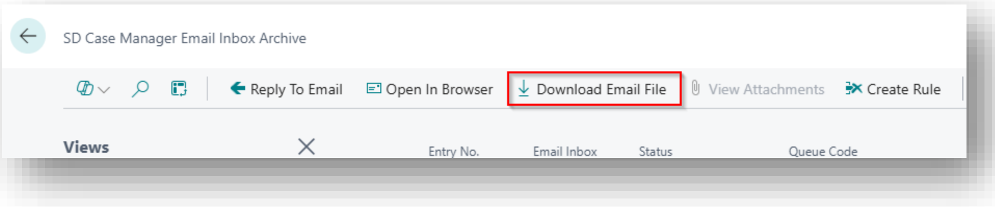


Figure 4-60

You can reply to an email using the Email Templates which includes the email trail. The email is matched to the Case by searching for the Case No field in the Email Inbox Archive and the templates to use are filtered down to the current Status of the Case. If there is no Case No. specified on the record in the Email Inbox Archive an email can be sent without using the email templates (*Figure 4-61*).

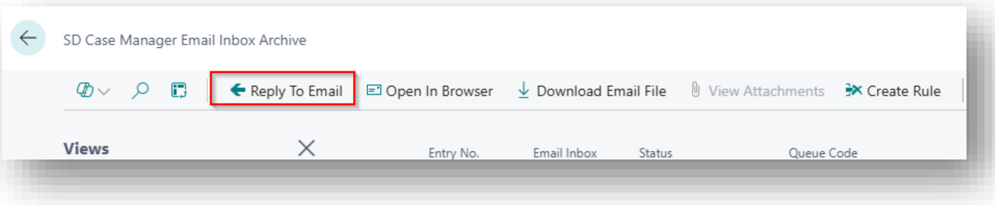


Figure 4-61

In the Email Inbox Archive there is a FactBox where you can see the email details (*Figure 4-62*).

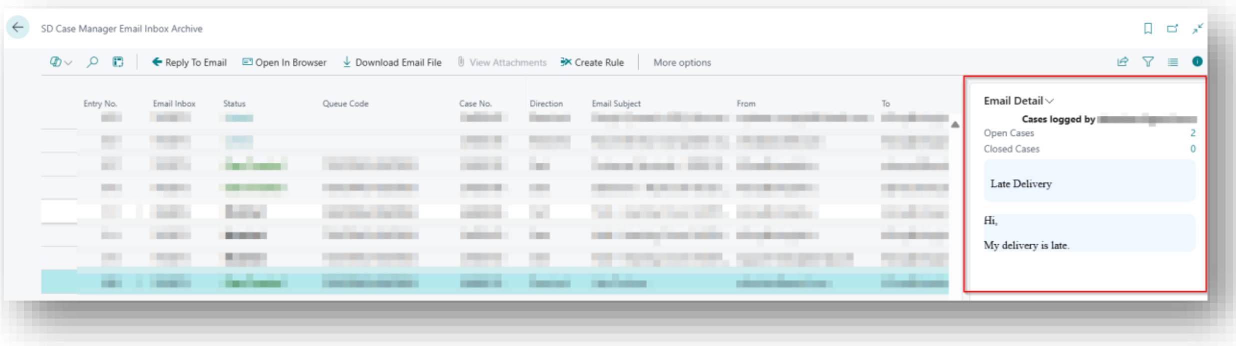


Figure 4-62

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

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

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

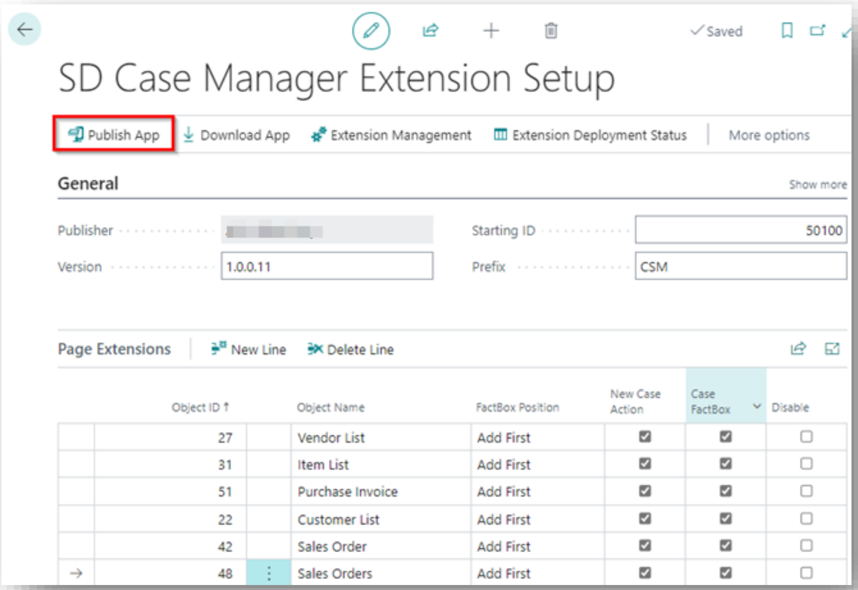


Figure 5-1

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

6 Uninstalling SD Case Manager

You can uninstall **SD Case Manager** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 6-1)*.

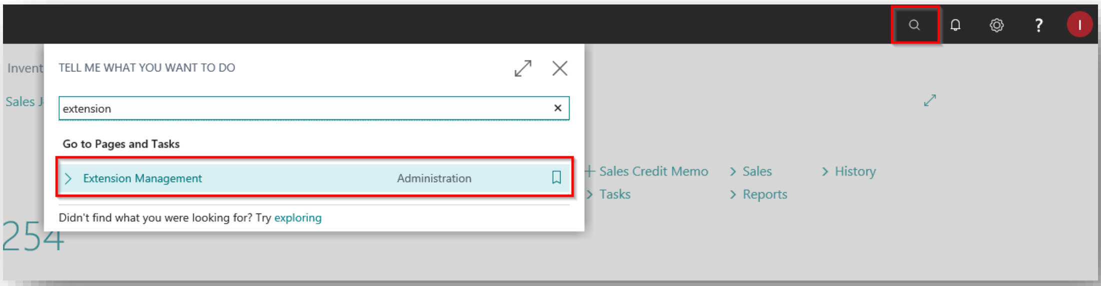


Figure 6-1

2. In **Extension Management**, you should see the **SD Case Manager** App installed.

3. Select the **SD Case Manager** App and choose the **Uninstall** action (*Figure 6-2*).

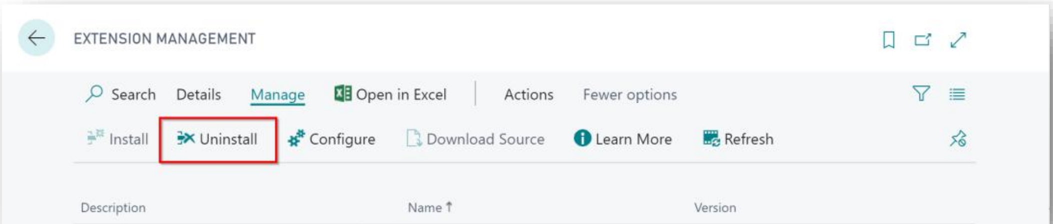


Figure 6-2

Dynamics
Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365

Simply Dynamics

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

Dynamics Shop

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

DynAzure

DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

Dublin Location

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