



# WORKFLOW

## Quality Support Cases

October 2 | 2018



# WORKFLOW | Quality Support Cases

User creates new Case.  
Chooses Quality Help Record Type:

## New Case

Select a record type for this Case

- ConnectYou  
ConnectYou Record Type
- Quality Help  
Quality Help Support Process

Cancel

Next

Enters case information:

- Branch (mandatory)
- Account (optional)
- Sales Order (optional)
- Contact (optional)
- Department / Type / Sub-Type (mandatory)
- Status – leave at New
- Pending close date – read-only, will populate later
- Priority – should we remove?
- Case origin – always Internal – Read Only
- Subject / Description – Mandatory

Clicks Save

New Case: Quality Help

**Case Information**

Case Number

Case Owner  
Barry Hicks

Case Branch  
--None--

Account Name  
Search Accounts...

Sales Order  
Search Sales Orders...

Contact Name  
Search Contacts...

**Additional Information**

\* Department  
--None--

\* Status  
New

View all dependencies

Case Type  
--None--

Pending Close Date

View all dependencies

Sub-Type  
--None--

Priority  
Medium

View all dependencies

Case Origin  
Internal

**Description Information**

Subject

Description

Cancel Save

# WORKFLOW | Quality Support Cases

- Automatically assigns to Quality Help Queue.
- Emails to Queue Members
- Sets status to In Progress

Click on Case number to open.

Cases  
Quality Support Queue ▾

7 Items - Sorted by Case Number - Filtered by Quality Support Queue - Updated a few seconds ago

	CASE NUMBER ↑ ▾	DATE/TIME OPENED ▾	CASE AGE (D... ▾	DEPARTMENT ▾	CASE TYPE ▾	SUB-TYPE ▾	ACCOUNT N... ▾	CONTACT NA... ▾	SUBJECT	STATUS ▾	PRIORITY ▾
1	<a href="#">00032684</a>	9/10/2018 8:51 AM	1	PVC Windows	800	Hardware				Closed	Medium
2	<a href="#">00032699</a>	9/10/2018 9:58 AM	1	PVC Windows	450	Welding			TEST	In Progress	Medium
3	<a href="#">00032714</a>	9/10/2018 11:00 AM	1	Doors	In-swing Single	Hardware			Hinge is Bent	In Progress	Medium
4	<a href="#">00032715</a>	9/10/2018 11:01 AM	1	Doors	In-swing Single	Damaged			Door Has Scratched Panel	In Progress	Medium
5	<a href="#">00032716</a>	9/10/2018 11:02 AM	1	Glass	Sungate 400	Dirty			Dirt on inside	In Progress	Medium
6	<a href="#">00032717</a>	9/10/2018 11:03 AM	1	Glass	Outsourced	Size			Wrong Size Unit	In Progress	Medium
7	<a href="#">00032718</a>	9/10/2018 11:04 AM	1	Patio Door	Alpha 450	Leaking			Door Leaking	In Progress	Medium

## Important Note:

Closed should never show in Queue.

Whoever closes should assign to themselves then close.

# WORKFLOW | Quality Support Cases

- To reassign the case to another owner, click on the change owner icon. (IMPORTANT: make sure the description in the case is complete and accurate so new owners know why the case was assigned to them.)
- Start typing the name of the new owner until it appears below the search box, then click on the name.

Case Owner

Quality Support Queue

Change Case Owner

gurme

"gurme" in People

Gurmeet Singh Sodhi  
Senior Manager

Owned by Quality Support Queue.

Notes and attachments

Open activities

Cancel Change Owner

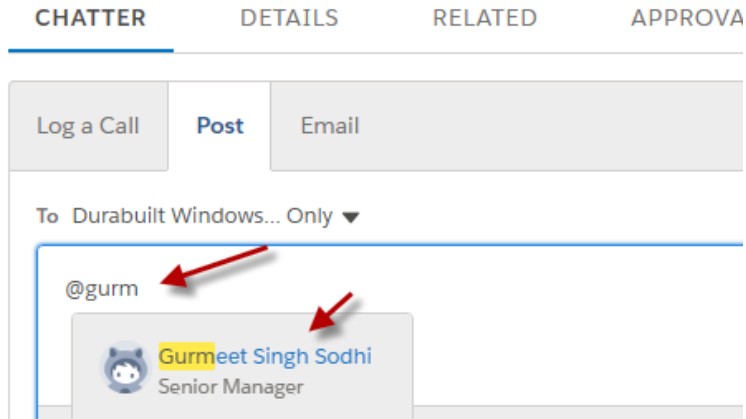
- Click the Send notification email box to ensure an email goes to the new owner.
- Click *Change Owner*.

Gurmeet Singh Sodhi

Send notification email

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- To Chatter with anyone on the case, click the *Chatter* tab then the *Post* tab. Start typing @ and the persons name until their full name shows up below the text box.



- Continue typing whatever message you want to send then click *Share*. The recipient will receive an email with a link to the chatter feed.



# WORKFLOW | Quality Support Cases

- When an assignee feels they have completed their work on this ticket they can select “Pending Close”. If they try to select “Closed” they will get an error. Only the Quality team can close a ticket.

Additional Information

\* Department: PVC Windows  
View all dependencies

\* Case Type: 800  
View all dependencies

\* Sub-Type: Hardware

\* Status: Pending Close  
--None--  
New  
In Progress  
✓ Pending Close  
Closed

Cancel

- “Pending Close Date” is automatically populated allowing us to track subsequent performance.

Additional Information

Department: PVC Windows

Case Type: 800

Sub-Type: Hardware

Status: Pending Close

Pending Close Date: 9/11/2018 9:35 AM

Priority:

# WORKFLOW | Quality Support Cases

- An email will be generated to the Quality team.



- Close the Case if it is verified as being complete or change the status back to In Progress and send back to assignee, or reassign as appropriate.
- MAKE SURE to Chatter to the assignee so the know why it is not being closed.

