Case settings

Version 8.0

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Set up a support mailbox

PRODUCTS: SERVICE CREATIO

Add support mailboxes to Creatio to accelerate communication with your customers:

- Creatio will register new cases automatically based on the incoming emails.
- Customers will receive case notifications.
- All case emails will be saved to the case history.

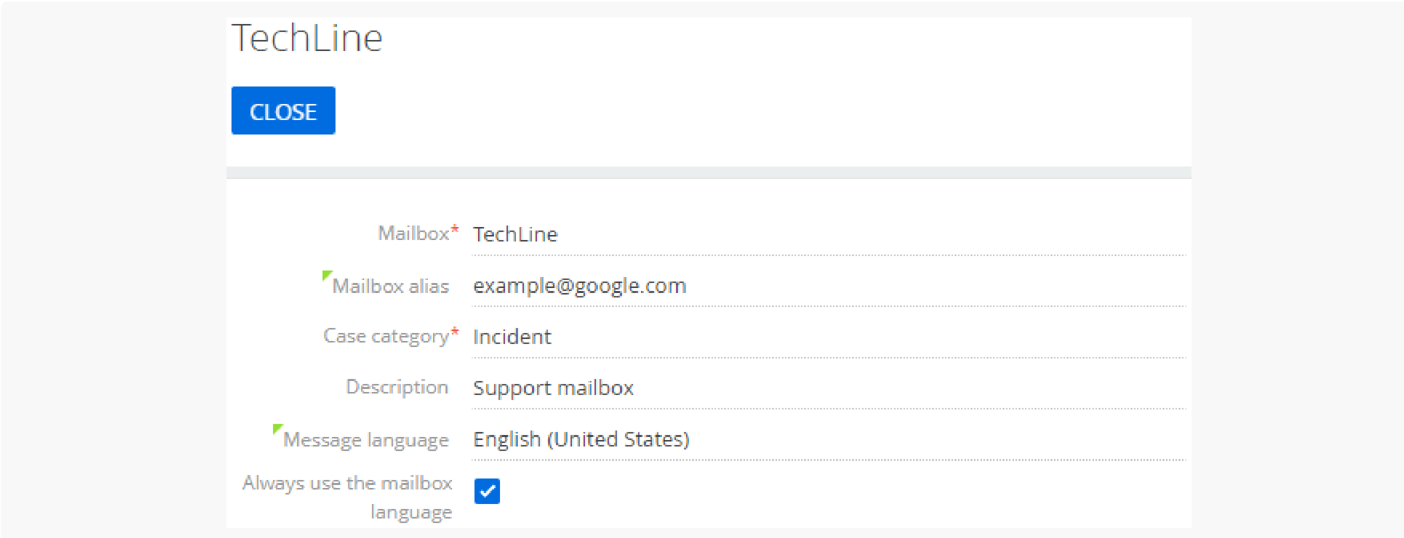
Add a support mailbox

1. Click the button to open the System Designer.

   Attention. Before you begin, set up the mail service provider integration either via the IMAP/SMTP protocol or using the Microsoft Exchange service.

2. Go to the “System setup” block → “Lookups.”
3. Open the [*List of mailboxes for case registration*] lookup.
4. Click [*New*].
5. **Select the support mailbox** added during the email integration setup in the [*Mailbox*] field. The field is required.
6. Specify the name of the mailbox you use to receive emails in the [*Mailbox alias*] field. Fill out the field only if you receive emails in the mailbox that differs from the mailbox you set up originally.
7. Specify the relevant category in the [*Case category*] field. For example, “incident.” The field is required.
8. Enter the mailbox description in the [*Description*] field.
9. Select the language Creatio will use for the email if the mailbox language selection rule is triggered in the [*Message language*] field. Learn more: Set up the language of the support mailbox.
10. Select the [*Always use the mailbox language*] checkbox to send emails in the specified language regardless of the other rules (Fig. 1).
11. Repeat steps 4–11 if you are using more than one support mailbox.

Fig. 1 Set up the support mailbox language



As a result, Creatio will process all emails received by the mailboxes in the case registration system.

You can also set up a shared support mailbox for communicating with customers and sending case notifications. Learn more: [Configure a shared mailbox](#).

Set up the language of the support mailbox

Set up the mailbox language to send localized emails to customers. In Creatio, you can set up the language for:

- the case notification mailbox
- the email notification template language
- the notifications sent to customers without the preferred language specified

Creatio determines the email language based on the following rules:

- If you **do not select** the [*Always use the mailbox language*] checkbox during the [email setup](#), Creatio will use the following variables to determine the language, from highest to lowest priority:
    - The preferred language of the recipient contact.
    - The email language specified during the mailbox setup.
    - The value of the “Default language for messages” (“DefaultMessageLanguage” code) system setting.
- If you **select** the [*Always use the mailbox language*] checkbox, Creatio will send emails in the mailbox language regardless of the other rules.

Set up “Junk” case registration

PRODUCTS: SERVICE CREATIO

Creation can process incoming “junk” emails, e.g., spam, auto-replies, and internal emails so that the agents do not spend time on them.

The setup procedure is as follows:

1. Specify email addresses, address strains or email domains of “junk” emails in the **Blacklist of email**

addresses and domains for case registration lookup. By default, the lookup contains the following values commonly used in the bulk emails: postmaster, noreply, no-reply, mail-daemon, mailer-daemon.

2. Specify the processing routine for “junk” emails in the “**Create cases from junk emails**” (CreateCasesFromJunkEmails) system setting.
   a. Clear the [*Default value*] checkbox to **disable creating cases based on “junk” emails**.
   b. Select the [*Default value*] checkbox to **create cases based on “junk” emails**.
3. If you select the [*Default value*] checkbox in the “Create cases from junk emails” system setting, populate the [*Default value*] field of the “**Junk case default status**” (JunkCaseDefaultStatus) system setting. For instance, select “Canceled” to automatically cancel any cases created from “junk” emails.

Set up automatic categorization of cases registered from email

PRODUCTS: SERVICE CREATIO

Configure automatic identification of category for cases registered from incoming emails to accelerate the processing of new cases created from emails. You are able to assign categories for cases received from different shared email accounts.

The setup procedure is as follows:

1. Make sure that support service mailboxes are configured. Read more in the “Set up support mailboxes” article.
2. Enable automatic categorization by editing the “Enable the relationship between support mailboxes and the categories of processed cases” system setting.
3. In the [*List of mailboxes for case registration*] lookup configure connection between support service mailboxes and case categories. To do this:
   a. Select a mailbox to set connection with case categories and click .
   b. On the opened edit page, specify the value in the [*Case category*] field. This value will be assigned to all cases registered from this mailbox. For example, “Service request”.
   c. If you already have configured case registration from incoming emails for several mailboxes, repeat steps a and b for each mailbox.

Set up case registration from emails from mailbox alias

Creatio can automatically register cases based on the emails that were forwarded to the Creatio mailbox from a different email. Note that Creatio will not add new cases for emails that were copied from one mailbox to another on the email server. To do this:

1. Click to open the **System Designer**.
2. Open the **Lookups** section.

3. Open the **List of mailboxes for case registration**.
4. Click **New**.
5. Populate the **parameters** of the new record:
    a. **Mailbox** – the mailbox that was synchronized with Creatio.
    b. **Mailbox alias** – the mailbox alias from which the emails are forwarded to the Creatio mailbox.
    c. **Case category** – the default category for all cases received from this mailbox. This lets you set up different categories for cases that arrive at a regular mailbox and those forwarded from mailbox aliases.
6. **Add a lookup record for each mailbox alias** used for receiving support emails.

If Creatio does not register cases from emails sent to mailbox aliases, check if the mail client sets the tag “Auto-Submitted: auto-generated” for the forwarded messages. Cancel tagging the emails with this tag if your email client permits it. If the “Auto-Submitted” tag is required, make sure that you set its value to “No.” If you cannot manage tags on the email client side, **disable protection from auto-generated emails** in Creatio. To do so:

1. Click to open the **System Designer**.
2. Open the **Lookups** section.
3. Open the **Email header properties management** lookup.
4. Click “**Auto-Submitted**” and clear the checkbox in the **Active** column.

    Please note that disabling protection from auto-generated emails will decrease the strength of Creatio’s spam protection.

Set up case customer feedback

PRODUCTS: SERVICE CREATIO

Creatio uses the “Customer SATisfaction” (CSAT) scale, for grading the quality of service by the case customers. You can set up automatic email notifications, asking a case customer to evaluate the quality of service after the case has been resolved. Creatio can automatically reopen or close cases, based on the customer feedback. If the customer does not provide feedback within a set time frame, a reminder email notification will be sent.

General procedure for setting up case feedback evaluation

1. Issue a **Portal license** to the SysPortalConnection user. Read more >>>
2. Configure the satisfaction scale and specify the rules for closing or reopening cases depending on the actual evaluation score in the **Satisfaction levels** lookup. Read more >>>

    > **Note.** If a case is reopened as a result of a low score point, its [*Assignee*] field will be cleared automatically and the case will be queued for processing. To disable clearing of the [*Assignee*] field, clear the [*Default value*] checkbox in the “Remove case assignee after case reopening” system setting.

3. Go to the [*Studio*] workplace → [*Email templates*] and edit the contents of the “**Case feedback request notification**” email template; add the template contents in different languages, if needed. Read more >>>

4. Specify the usage rule (“Send immediate” or “Send after a delay”) in the **Case notification rule** lookup. Read more >>>
5. Configure sending a second evaluation request if the customer did not rate the work of the support service after the first notification. Use the “**Number of waiting days to reevaluate resolved case**” (FirstReevaluationWaitingDays) and “**Number of waiting days after second reminder of resolved case**” (SecondReevaluationWaitingDays) system settings.
   If the customer does not provide a score after the reminder, Creatio will automatically close the case after the time specified in the corresponding system setting.

User satisfaction scale setup

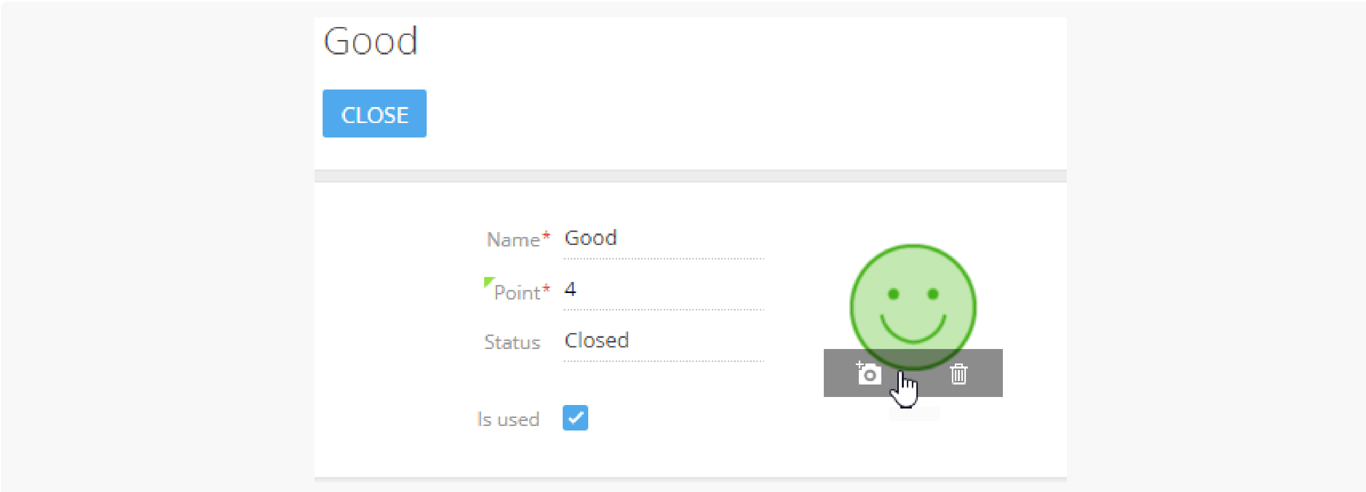
You can customize the scale that is displayed in the case resolution message in the [*User satisfaction levels*] lookup.

By default, the lookup contains a 5-point scale: “Extremely poor“, “Poor“, “Neutral“, “Good“, “Excellent“. Case status in the [*Satisfaction levels*] lookup is determined according to the score given by the customer.

You can set up a scale with an optional number of points, for example, 3 or 7, and customize the color schema. To add a new level to the scale:

1. Click to open the System Designer.
2. Go to the [*System setup*] block → click **Lookups**.
3. Select the **Satisfaction levels** lookup in the list.
4. Add a new record and populate the fields:
   a. Fill out the name of the satisfaction level that is going to be displayed in the [*Rating*] field on the [*Closure and feedback*] tab of the case page.
   b. Specify the rating for the level. This rating will be used in the system for statistical calculations and customer satisfaction analysis in different sections.
   c. Select a status that will be automatically assigned to cases that receive this satisfaction score.
   d. Select the [*Is used*] checkbox to add the score to the email notification template.
5. Click . On the edit page of the satisfaction level, add an image that will display corresponding satisfaction level in the email. To do this, click the button and load the image (Fig. 1).

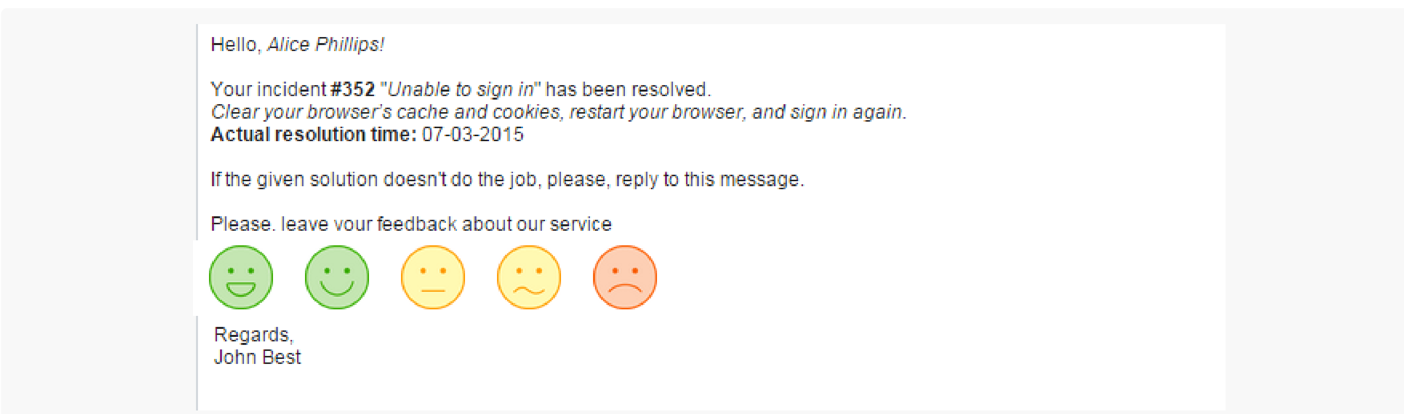
Fig. 1 Uploading the satisfaction level image



Attention. Deleting base lookup values is not recommended, since this may lead to incorrect work of preconfigured business processes. Deselect the [*Is used*] checkbox to remove the score from the scale.

As a result, the case resolution notification will contain the customized scale for evaluating the work of the service team (Fig. 2).

Fig. 2 A user satisfaction scale in the email



After selecting a score the case will change its status automatically. For example, the score is "Poor", the case will be reopened automatically.

Upon clicking a grade in the email, the case customer's browser will open a page that will let them add a comment to their evaluation grade. The page displays a corporate logo according to the value of the [*Logo - Thank you for your feedback*] system setting. Corporate logo setup is covered in a separate article.

Both the customer’s grade and comments will be automatically added to the [*Feedback*] field block on the [*Closure and feedback*] tab.

View case feedback grades

The CSAT score and the comment that the customer leaves on the “thank-you” page are displayed on the **Closure and feedback** tab of the case page. General CSAT indicators are available on the **Feedback** tab in the **Dashboards** section.

Use the **Ability to change case satisfaction level** system operation to manage permissions for modifying information on the [*Closure and feedback*] tab.

> **Note.** By default, employee users do not have permission to edit the case feedback, while the portal users have such permission.
> We recommend granting permission to the [*Ability to change case satisfaction level*] system operation only to senior managers of customer support department.

Set up email notifications

PRODUCTS: SERVICE CREATIO

Creatio sends automatic emails with various notifications regarding cases. Users receive emails when their cases are registered, processed, resolved, canceled, or closed.

The general setup procedure is as follows:

- Set up contact case notification rules. Read more >>>
- Set up email notification templates. Read more >>>
- Set up case resolution notifications. Read more >>>

If the case was registered by email, all recipients of the original letter will receive notifications. By default the [*From*] field will contain email of support service that received customer's email. If the case was registered from another channel (portal, call, etc.), then the [*From*] field will contain email of the support service specified in the [*Customer service Email*] system setting. To send notifications only to the case contact, even if they did not send the original email, enable the "Send automatic notifications only to contact" system setting ("AutoNotifyOnlyContact" code).

The logic for sending email notifications is set up in the "Send email to contact on case status change" business process.

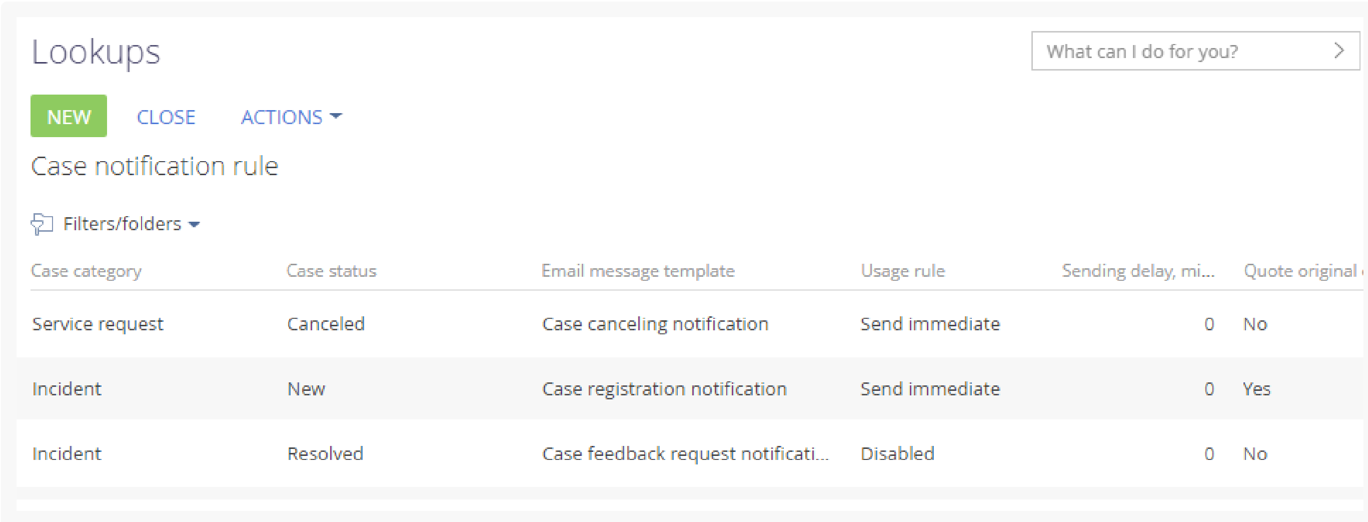
> **Note.** You also have to set up a mailbox for sending email notifications in Creatio version 7.12.2 and earlier. Read more in the Creatio 7.16 documentation.

Set up contact case notification rules

The setup procedure is as follows:

1. Open the system designer by clicking the button.
2. Go to the [*System setup*] block → click [*Lookups*].
3. In the [*Lookups*] section, open the **Case notification rule** lookup content (Fig. 1).

Fig. 1 The [*Case notification rules*] lookup content page



4. Click **New** and set the notification parameters:

   a. Case category

   b. Case status

   c. Email message template

   d. Usage rule – choose whether the notification immediately or after a delay. To configure sending delay of the selected notification rule, specify the “Send after a delay” usage rule and populate the [*Sending delay, minutes*] column.

   e. Sending delay, minutes Select the [*Quote original email*] checkbox to include the text of the email that originated the case.

5. Save the changes by clicking the button.

Set up the email notification templates

The email template used for each notification depends on the case status and category. For example, the [*Case closure notification*] template is used to notify the user that the case has been closed.

Use the [[*Email templates*] lookup] to manage the notification templates.

To set up an email template:

1. Open the system designer by clicking the button.
2. Go to the [*System setup*] block → click **Lookups**.
3. Open the **Email templates** lookup.
4. Select a template and click **Edit**.
5. In the displayed [content designer] window, edit the text of the email.
6. If required, add macros to the template, for example, the #Number# macro to specify the incident number in the message. To do this, click the button and select the [*Standard macros*] action. If there is no required macro in the list of pre-installed macros, use the [*Custom macro*] action and set up the required macro.

   Contents of the [*Email templates*] lookup

Creatio uses the following templates for sending service notifications to the customers:

- **“Case registration notification“** – notifies the customer that the case has been registered in Creatio and is about to be processed.
- **“Case processing notification“** – notifies the customer that the helpdesk team has started processing the case.
- **“Case resolution notification“** – notifies the customer that the case has been resolved.
- **“Case closure notification“** – notifies the customer that the case has been closed.
- **“Confirmation of closing request”** – notifies the customer that the case has been closed when the customer did not reply to the question of the support operator.
- **“Case canceling notification“** – notifies the customer that the case has been canceled. This may occur if a case was created by mistake.
- **“Case feedback request notification”** – notifies the customer that the case has been resolved and awaits customer feedback and evaluation of the helpdesk performance.
- **“Case update: new message received”** – notifies the customer that the case has been updated with a new message on the customer portal.
- **“Empty case email template** – used for specialized case notifications.
- **“Template - Portal user registration”** – sends an account activation link to the new customer portal user.
- **“Link for password recovery”** – sends a link to password recovery page to the customer portal user.

Creatio uses the following templates for sending **notifications to helpdesk agents**:

- **“Specifying case assignee”** and **“Case assigned to group”** templates are used to send internal notifications to employees about being appointed assignees on cases.
- **“Creating new email for case”** – notifies the assignee that the case has been updated with a new email message.

Set up case resolution notification

When a case is assigned the “Resolved“ status, the user will receive an email asking to evaluate the quality of processing. If no evaluation is received, an additional evaluation request will be sent. You can manage the response waiting time before sending additional evaluation request using the **Number of waiting days to reevaluate resolved case** system setting.

To ensure a proper quality evaluation emailing, set up the link of Creatio website that will be used for gathering user feedback. Populate the [*Default value*] field of the **Website URL** system setting with the site URL used for Creatio access, for example http://creatio.com.

Set up response and resolution deadlines

PRODUCTS: SERVICE CREATIO

Creatio enables you to calculate case response and resolution time. You can select the time calculation rule that suits you most and set it up according to your business specifics. Response and resolution deadlines can take the following factors into account:

- Case priority

- Case service
- Service in the applicable service agreement (available in Service Creatio, enterprise edition).

You can set up response and resolution deadlines in two steps:

- Set up calendars.
- Select a deadline calculation rule.

Set up time values for deadline calculation rules

The response and resolution deadline calculation accounts for holidays, weekends and work hours specified in the calendar used for the customer service. Set up calendars for correct deadline calculation. By default, one standard calendar with the following characteristics is available:

- Time zone GMT 0, without daylight saving time.
- 5-day workweek (from Monday till Friday).
- 8-hour work day (from 9:00 AM to 6:00 PM), without lunch break.
- Reduced work days and holidays are not included.

This calendar is specified as default in the [*Base calendar*] system setting. The [*Base calendar*] system setting must be populated for the correct work of calendars. You can modify the standard calendar according to the support service schedule of your company, or create a new one and add it to the system setting as the default one. You can also create additional calendars that take into account additional scheduling of services provision. For example, calendars of services provision with different work hours or different time zones.

The service calendar is the calendar the system used to calculate case response and resolution deadlines. Creatio will select the firs available calendar, by checking the availability in the following order:

1. **The calendar of the service in the applicable service agreement** (available in Service Creatio, enterprise edition). When service provision schedule differs from the general calendar of the service agreement, you can specify separate calendars on the service page in the service agreement. If the corresponding calendar is not specified, the system will use the calendar in the service contract.
2. **The calendar of the applicable service agreement** (available in Service Creatio, enterprise edition). You can set up specific calendars of service provision for customers located in different time zone. This calendar is specified in the customer service agreement. One calendar can be specified in several service agreements. If the service contract calendar is not available, the system will use the base calendar.
3. **The service calendar** is the service provision calendar specified on the service page. If the calendar is not available on the service page, the system will use the base calendar.
4. **Base calendar** is the calendar specified in the [*Base calendar*] system setting. The system uses this calendar if no custom calendar is specified.

> **Case.** Create a new calendar for a service that is provided six days a week. Saturday has shorter working hours. Fixed one-hour technical break.

5. Open the System Designer.
6. Go to the [*System setup*] block → click **Lookups**.
7. Open the **Calendars** lookup.

8. Click [*New*]. Specify the new calendar name and time zone.
9. Click the button and edit the workweek settings. The default week parameters match the parameters of the base calendar.
10. Set up workweek. Set the day type as “Work” for all days from Monday to Friday, “Reduced” for Saturday and “Day off” for Sunday.
11. Set up work time. Set the technical break by separating the work time into two intervals, before and after the break: 9:00AM–1:00PM and 2:00PM–6:00PM.
12. Specify all holidays on the [*Days off*] tab.

    The created calendar can be set as the base calendar or specified on a service page. Additionally, Service Creatio, enterprise edition enables specifying this calendar in a service agreement page or the page of service in a service agreement.

To specify the service calendar in the service agreement:

1. Open the service agreement page
2. Select the service for which you want to specify a separate calendar.
3. Click the button and select the [*Edit*] command in the menu.
4. On the service page, in the [*Calendar*] field, select the calendar you just created.

Select a case deadline calculation rule

The [*Case deadline calculation rules*] lookup contains a list of rules that can be used for calculating response and resolution deadlines for cases.

General procedure for selecting a deadline calculation rule:

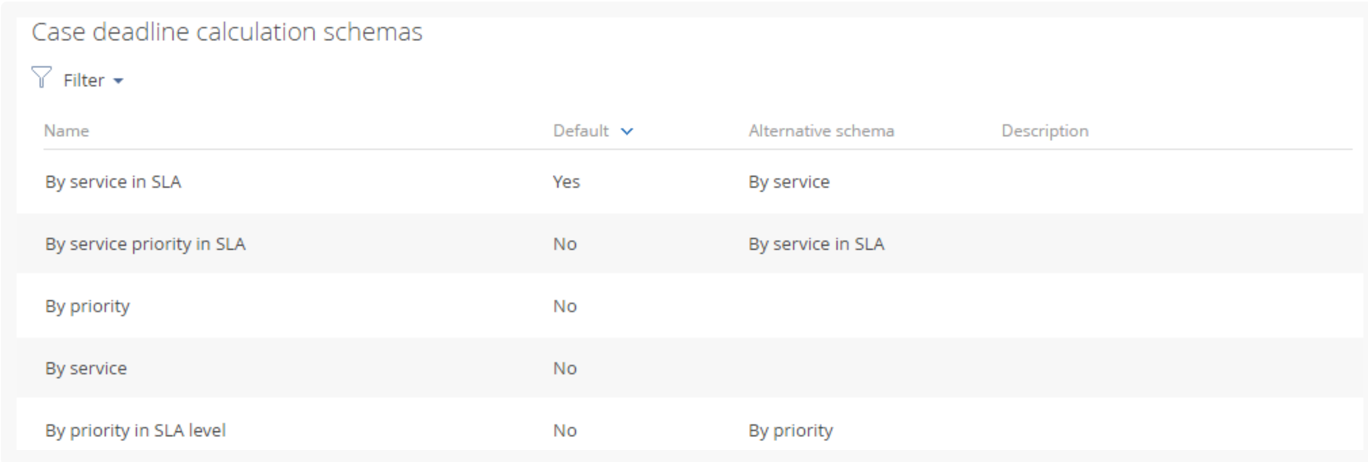
- When calculating response and resolution time, the system will use the rule set by default.
- If there is not enough data in the default schema, Creatio will use the alternative rule. If an alternative rule is not specified, the deadlines will not be calculated. If an alternative rule is specified, but also cannot be applied, its own alternative strategy will be used, and so on.
- If none of the rules can be used, the deadlines will not be calculated.

The response time and resolution time are calculated independently from one another. If the data in the case is sufficient for calculation based on the base resolution time calculation rule, but not sufficient for calculation of the response time, then the resolution time will be calculated based on the base rule, and the response time - based on the alternative rule.

Case. Set up the calculation of deadlines by case priority with an alternative calculation by service.

1. Open the system designer by clicking the button.
2. Go to the [*System setup*] block → click **Lookups**.
3. In the [*Lookups*] section, open the **Case deadline calculation rules** lookup content (Fig. 1).

Fig. 1 The [*Case deadline calculation rules*] lookup


Case deadline calculation schemas

Filter

Name	Default	Alternative schema	Description
By service in SLA	Yes	By service	
By service priority in SLA	No	By service in SLA	
By priority	No		
By service	No		
By priority in SLA level	No	By priority	

4. Select the “By priority” rule.
5. Select the [*By default*] checkbox.

> **Note.** The [*By default*] checkbox can be selected only for one strategy. If you try to select a checkbox for two rules simultaneously, only the last selected checkbox will be saved.

6. Specify “By service” in the [*Alternative schema*] field of the default rule.

   We recommend setting up an alternative rule for each rule. Therefore, when calculating response and resolution time, all possible case parameters will be taken into account.

Set up case response and resolution deadlines

The response and resolution deadlines are calculated based on the case, service, and service contract data as well as the corresponding calendar. In Service Creatio, enterprise edition, the service agreement will also be taken into account.

The deadlines are calculated based on the following strategies:

- Service
- Case priority
- Service in the applicable service agreement (available in Service Creatio, enterprise edition).
- Case priority based on the service in the applicable service agreement (available in Service Creatio, enterprise edition).
- SLA priority (available in Service Creatio, enterprise edition).

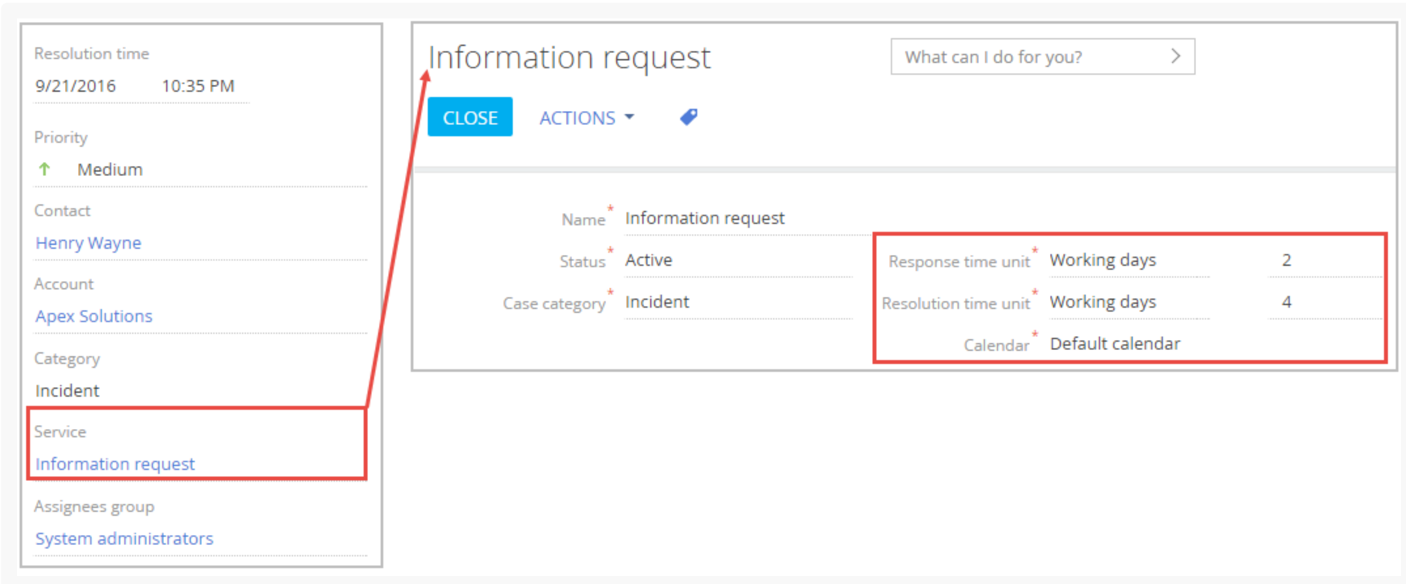
One of the rules is used by default, while others can be alternative rules. If Creatio is unable to calculate deadline using the default rule, it will automatically attempt its alternative rule. If the alternative rule cannot be used, and if it has its own alternative rule, Creatio will use that rule. If an alternative rule is not specified, the deadlines will not be calculated. Use the [*Case deadline calculation rules*] lookup to set the default and alternative rules.

> **Note.** New rules are created with development tools in the Creatio platform

By service

This deadline calculation strategy is based on the service page data and the calendar of the service (Fig. 1) or the service agreement (in **Service Creatio, enterprise edition**). **Service Creatio, customer center edition** use this rule as the primary one.

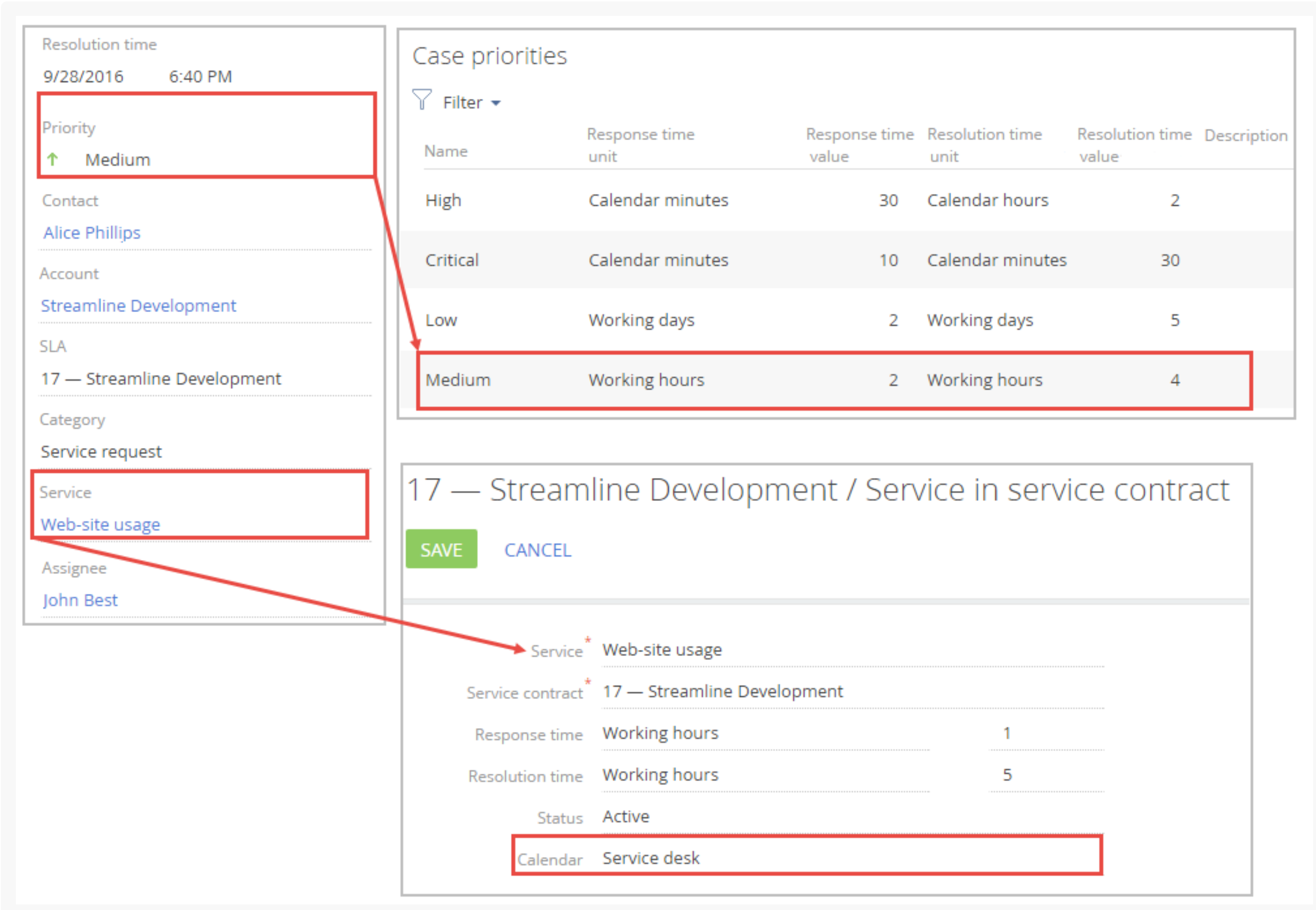
Fig. 1 Data used for calculating deadlines by service



By priority

Creatio uses the [*Case priorities*] lookup data (Fig. 2). This strategy is based on the response and resolution deadlines set for different case priorities.

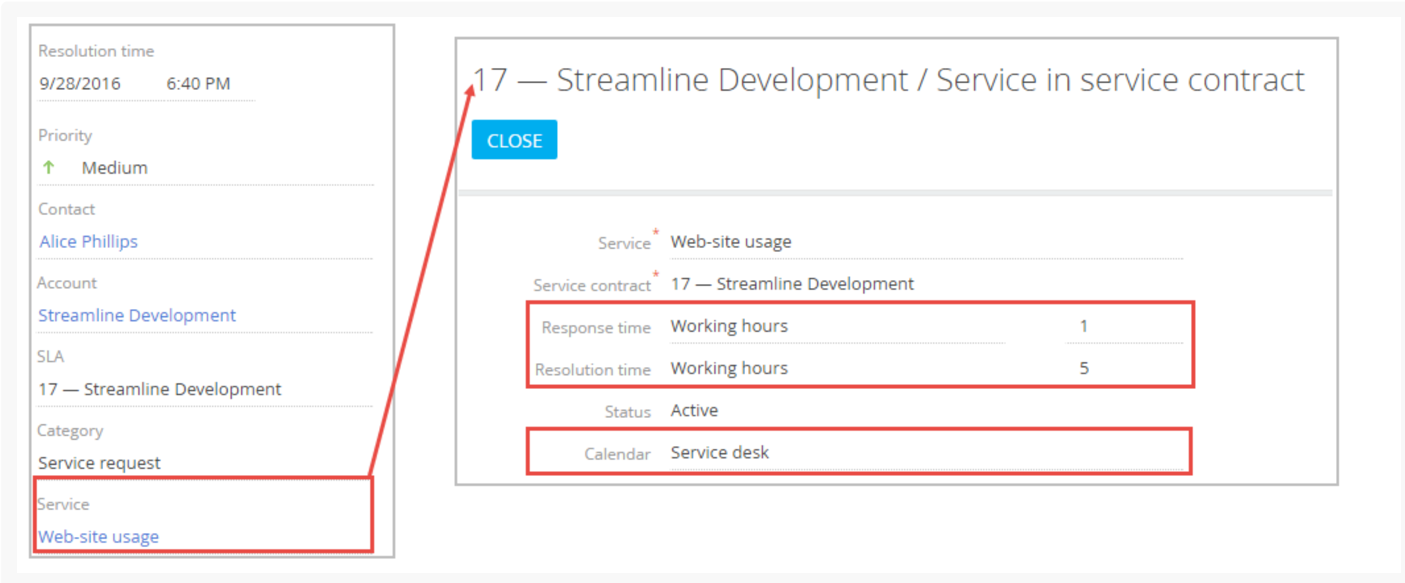
Fig. 2 Data used for calculating case deadlines by priority



By service in SLA

This strategy is based on the values in the [*Response time*] and [*Resolution time*] fields on the [*Services*] detail of the service contract page (Fig. 3). If the service calendar is different from the service agreement calendar, specify the service calendar on the same detail. This is the default rule for calculating deadlines in **Service Creatio, enterprise edition**. Its alternative rule is “By service”.

Fig. 3 Data used for calculating deadlines by service in SLA

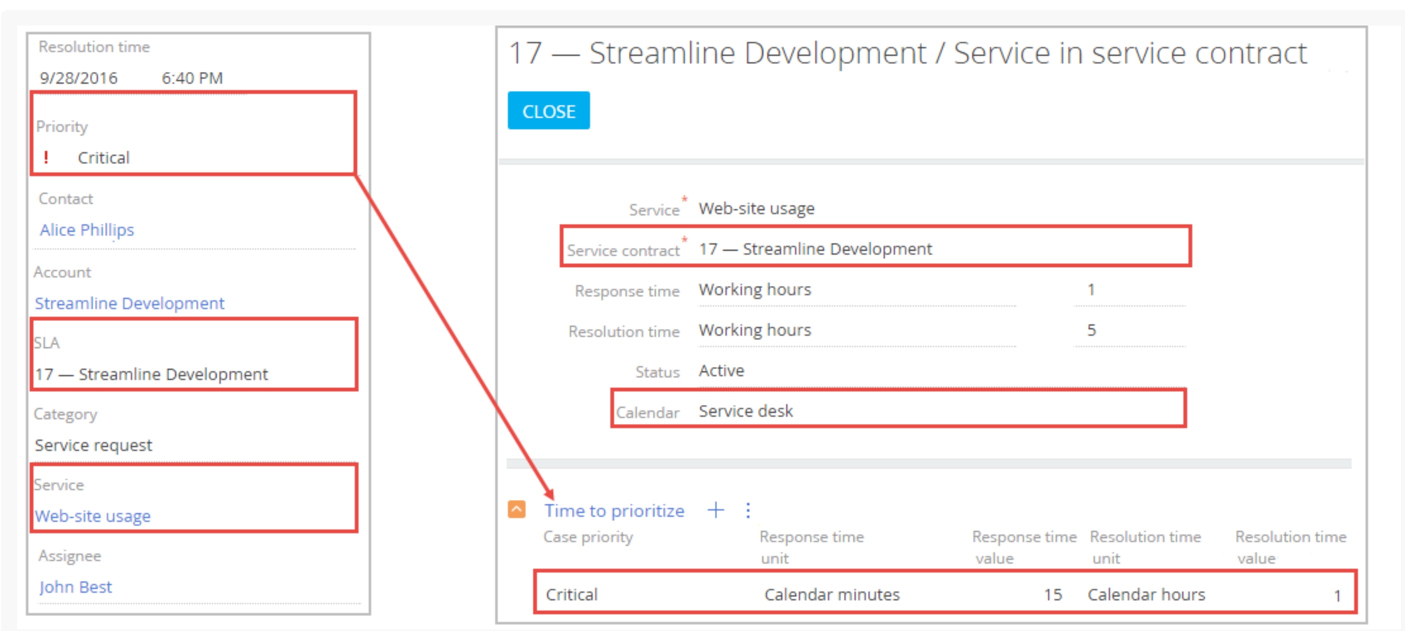


Note. In this case, the specified calendar will be used when calculating the response and resolution time. Otherwise, the response time will be calculated according to the base agreement calendar.

By service priority in SLA

This strategy uses the values on the [*Time to prioritize*] detail on the page of the service in SLA (Fig. 4). If the service calendar is different from the service agreement calendar, specify the service calendar on the same detail.

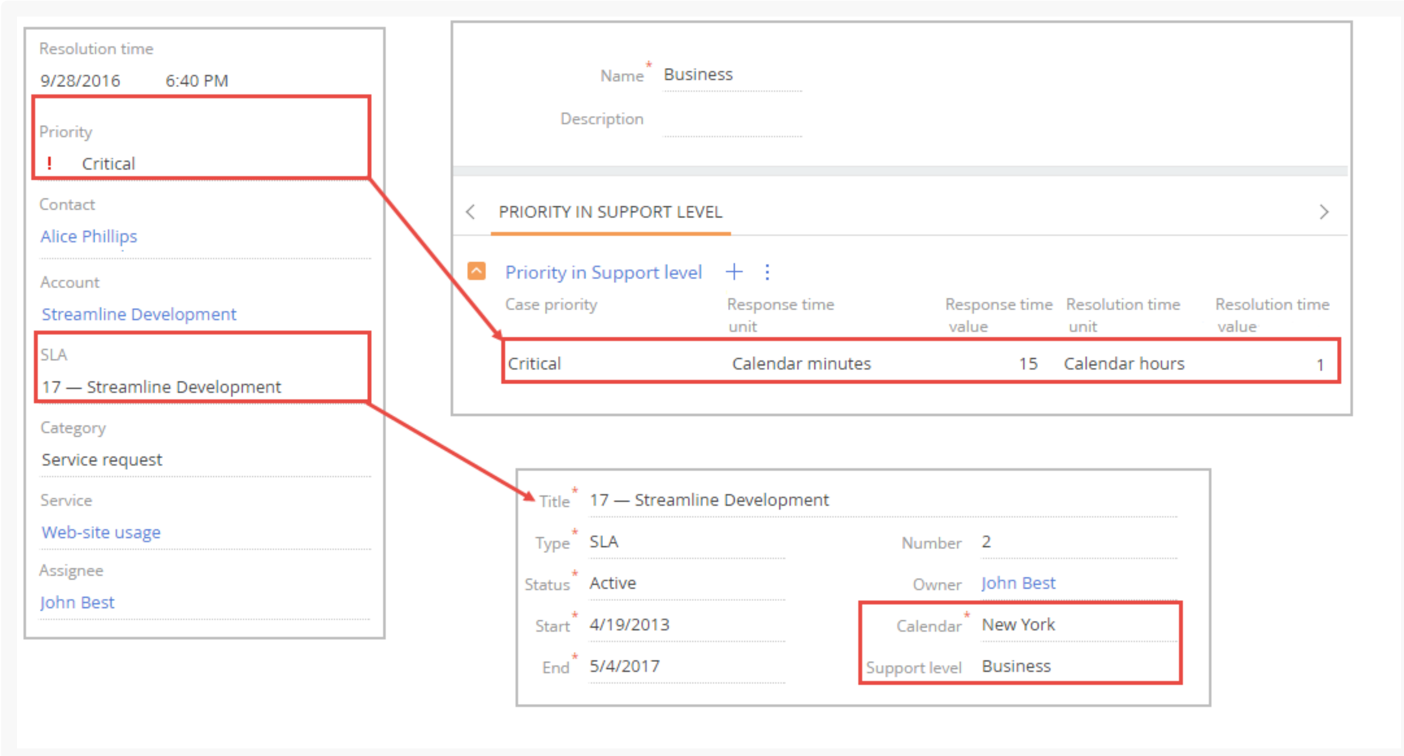
Fig. 4 Data used for calculating deadlines by service priority in SLA



By priority in SLA level

The calculation is based on the data from the [*Priority in Support level*] detail of the [*Support levels*] lookup pages (Fig. 5). This strategy requires that a support level and a calendar is specified in service contracts.

Fig. 5 Data used for calculating deadlines by priority in SLA level



The setup procedure is as follows:

1. Open the contents of the **Support levels** lookup.
2. Select a support package to configure and click .
3. Response and resolution deadline values by case priority in the Service package are sown on the [*Priority in Support level*] detail. To do so:

   a. Click + .
   b. Populate the [*Priority*] field.
   c. Populate the [*Response time unit*] field.

   > **Note.** The “Working days” time unit is not converted in working hours. If 1 working day is set as response deadline and the case was registered before the working day started, then the end of this working day will be the actual response deadline. If the case was registered during the working day, then the response deadline will be the end of the next working day.

   - Specify the response deadline in the [*Response time value*] field.

   Populate the [*Resolution time unit*] and [*Resolution time value*] fields.

These values are used in the calculation of the response and resolution deadlines according the “By priority in SLA level” strategy in the [*Case deadline calculation rules*] lookup.

Set up case statuses

PRODUCTS: SERVICE CREATIO

You can manage the statuses of cases in Creatio using the [*Case statuses*] lookup. The [*Case statuses*] lookup functions:

- Create a list of possible states of service cases, e.g., “New,” “In progress,” “Closed,” etc.
- Set the final state, from which a case cannot transition to other states.
- Set states indicating that a case has been resolved.
- Set states that stop the case processing.

The setup procedure is as follows:

1. Open the system designer by clicking the button.
2. Go to the [*System setup*] block → click **Lookups**.
3. Open the contents of the **Case statuses** lookup.
4. Edit the properties of case statues directly in the list.
5. Click and go to additional parameters and conditions for going from one state to another.

The lookup fields are as follows:

Name	Case status name, that is displayed in the [*Status*] field, for example, “In progress“.
Description	Additional information about the case status, that cannot be specified in other fields.
Is final	Indicates that cases in this status have finished processing. By default, the final statuses are “Cancelled” and “Closed”. Closed or cancelled cases cannot be assigned any other statuses.
Is resolved	Indicates that a solution or an answer has been sent to the user. By default this checkbox is selected for the “Resolved” status. If a case is assigned this status, the timer for the resolution deadline stops.
Is paused	Indicates that cases in this status are suspended for some reason, usually because a response or an action from the user is expected. By default, this checkbox is selected for the “Pending” status. The resolution timer is paused for cases that have this status.
Button caption	The caption of the button that changes the case status to the current one. This button is displayed in the list of the [*Cases*] section as well as on the case page.
Close on save	If this checkbox is selected, then, whenever the user saves a case in this status, the case page will be automatically closed.

The lookup contents will be used on the case page.