

Case Designer workflows

Execute a case

Version 7.17



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Execute a case

PRODUCTS: **ALL CREATIO PRODUCTS**

You can add a case to most Creatio sections. Some sections, e. g., [*Opportunities*], [*Leads*], [*Cases*], come with pre-configured cases out of the box. Learn more: [Set up cases in sections](#).

Note. We recommend disabling the section's business process before running the section case. Otherwise, the case and the process will run in parallel.

The section case launches automatically when a new record that matches the launch conditions is created. The case also creates activities and launches sub-processes included in the first stage automatically.

By default, cases execute the stage elements immediately upon transitioning to the stage. If you set the [*When is the setup performed?*] field in the element settings to “After the previous step is complete,” the case will execute the element only after the step specified in the [*Perform after step*] field.

Use the workflow bar on the action panel to advance through the case stages. Creatio displays all activities created as part of the case on the action panel.

You can set the case to transition to a specific stage depending on the results of the task or the conditions of the subprocess at the current stage.

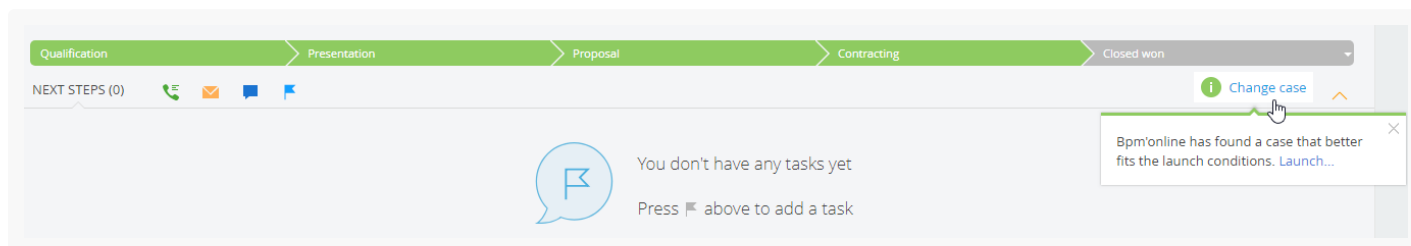
The case owner will see case steps on the action panel. Complete tasks and advance through the stages to achieve the goal of the case. Completing all the steps on a stage is not required. Users must complete only the required steps to advance through the case.

Note. Users can advance to the final “unsuccessful” stage from any stage without completing the required steps.

Change case

If the record page's field value that triggered the case changes, and there is a more suitable case for the new value, the action panel will display the [*Change case*] button (Fig. 1).

Fig. 1 The [*Change case*] button



To launch a new case:

1. Click the [*Change case*] button.
2. Select the “Launch” command.
3. Click [*Proceed*] in the dialog box to confirm the case change.

As a result, the record page will display the stages and activities of the new case.