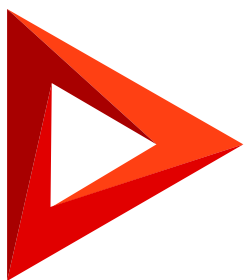


# FAQ

## Dynamic case FAQ

Version 7.17



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# Dynamic case FAQ

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## What happens to case tasks if you transition to the next stage ahead of schedule

If necessary, you can advance to the next stage of the case ahead of schedule by completing only the required steps of the current stage. In this case, all unfinished tasks and case steps of the previous stages will be canceled.

## What happens to case tasks if you return to the previous stage

The flexibility of the case management concept enables you to return previously completed case stages. In this case, all unfinished tasks of the current stage will be canceled, and new tasks will be created for the stage you returned to.

## What happens to the case when you transition to the final stage

To complete a case, you need to complete all steps and tasks that precede the last stage. If the last stage does not contain steps, the case will be completed once the stage is selected on the workflow bar. Incomplete steps of the previous stage will be automatically canceled.

## What happens to records if the stage connected to them is removed from the case

Stages of the case are associated with the steps from the lookup, specified in the [ *Which column to build the stages by?* ] field on the [ *Cases* ] tab of the section wizard. Deleting a stage means that it will no longer show up on the workflow bar. However, the corresponding record will not be deleted from the lookup. For example, the "Presentation" stage was deleted from the case in the [ *Opportunities* ] section. In this case, all the opportunities at this stage will remain on it, but without displaying the stage on the workflow bar. To continue working with the opportunity, transfer it to another case stage. That means you will not lose important data while modifying the case.

## What happens to a deactivated case

The case that was deactivated will not work for new records. For those records that were created before deactivation, all stage steps will still be performed.