

# Case statuses

Set up case statuses

Version 8.0



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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 statuses 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 [ <i>Status</i> ] 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 [ <i>Cases</i> ] 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.