4.0 Cases

4.1 Case Management

Cases currently enter the system via :

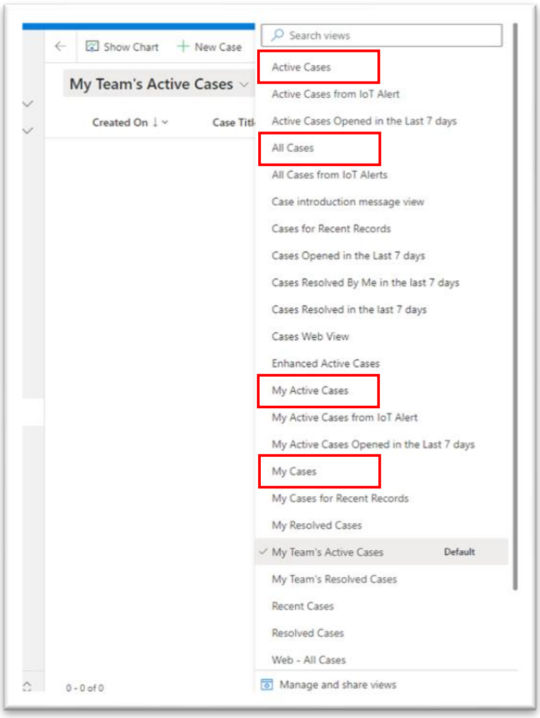
- Dedicated mailboxes equipped with automatic case creation and routing rules.
- The 'Ask Flinders' portal (These will have the origin as “Web”).
- Flinders website (enquiry form powered by Jot Forms).

No matter where a case originates—email, portal, or web form—our routing rules ensure they are correctly categorised. For those that can’t be categorised, we have a backup rule and team that allows for the Flinders Connect team to identify and correctly route cases.

Inside the system, cases are aligned with specific teams as denoted by the Owner. Based on your role, you're assigned to one, or multiple teams. Your default view will be 'My Team's Cases', ensuring that you immediately see the open cases relevant to your team's focus.

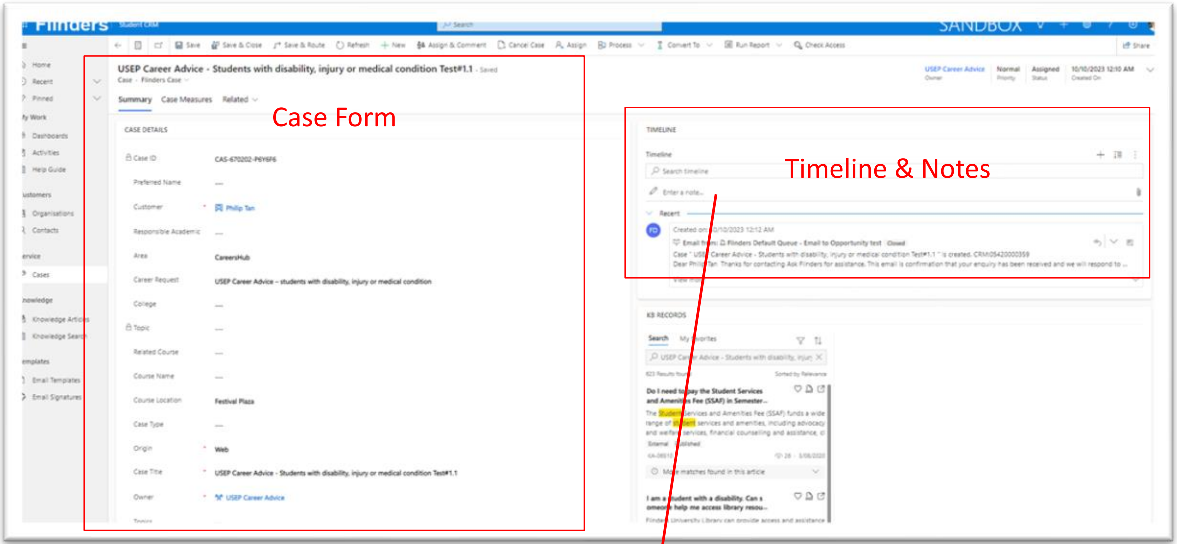
There are quite a few views that are available, however some helpful views include:

- **Active cases** – shows all open cases in the system, regardless of team ownership.
- **All cases** – shows all cases in the system, regardless of status and Team ownership.
- **My active cases** – similar to active cases, but only shows cases owned by you.
- **My cases** – same concept as all cases, but again, only owned by you.



4.2 Case Form

Case page Layout



Notes are entered against a case here.

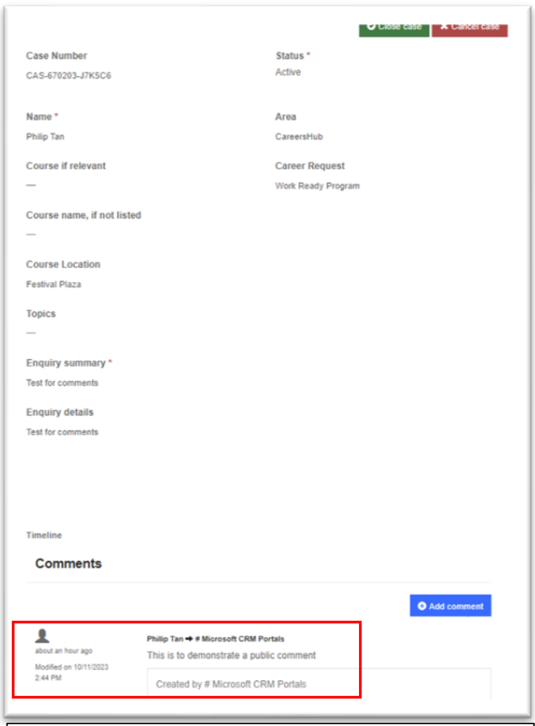
4.2.1 Add Notes

These notes are only visible internally. These can be viewed by your work colleagues.

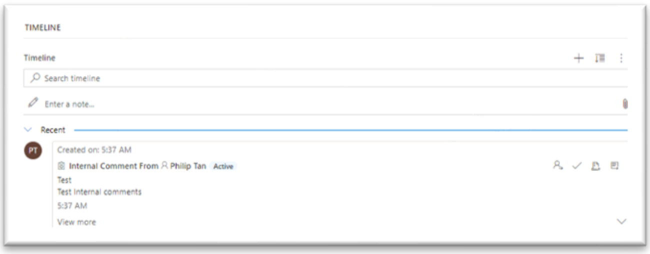
4.2.2 Comments– Public or Internal

Internal Comment – Only visible to other CRM users.

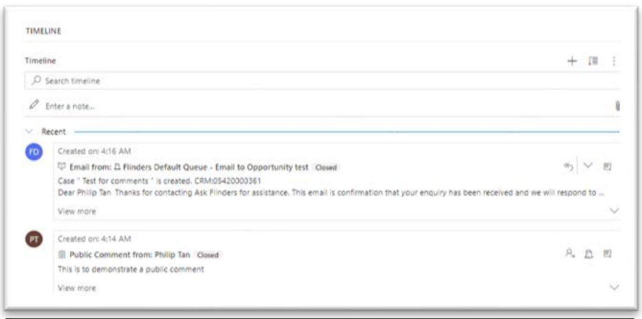
Public Comment – When a comment has been made by a student in the ASK Flinders portal. This is visible to all users of the CRM.



ASK Flinders View



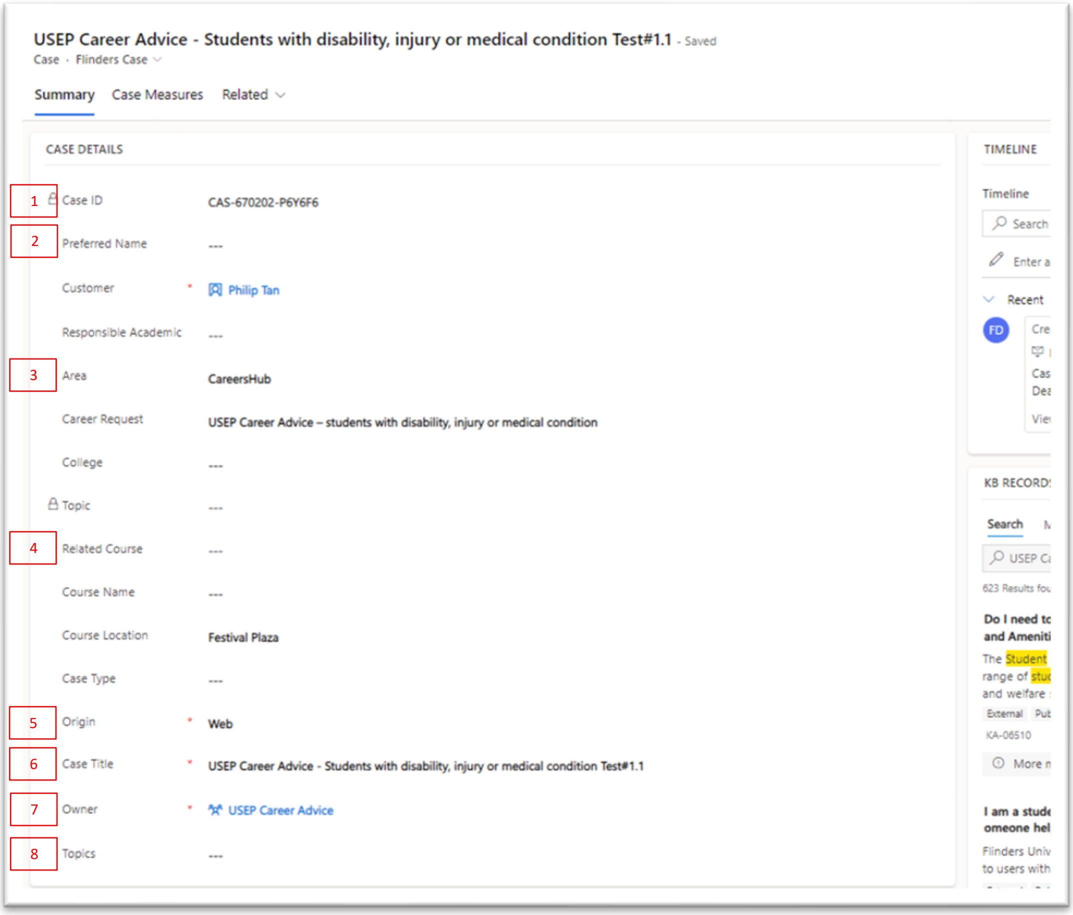
CRM View of Internal Comment



CRM View of Public Comment

4.2.3 Case Form Fields

The Case form consists of the following fields:

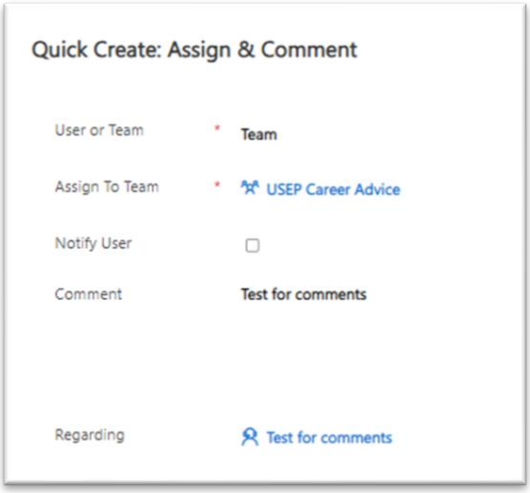


1. **Case ID** is an automatically generated case number.
2. **Preferred Name** is a new field that to help us ensure we use the students preferred name. This will automatically be filled out from the students contact record at the time of case creation where possible. Feel free to add a value here if it becomes apparent during your interactions with the student.
3. **Area** is a key field, this is generally what's used to ensure cases are routed to the correct team. **Change this as appropriate.** As we change this, we can see additional fields appear. These allow us to add additional context and are leveraged in routing rules.
4. **Related Course** & **Course Name** can be specified optionally by the student when creating a case via the ***Ask Flinders*** Portal. Feel free to update these with more accurate information as it comes to light.
5. **Origin** – just tells us where the case originated.
6. **Case Title** – When a case is created via ask flinders, this is the enquiry summary specified by the student otherwise it will be set via an email subject, JotForm default value or by another staff member.
7. **Owner** – This is the team or user that currently owns the case
8. **Topics** – This is a free form text field where students can give us a list of topics an ask flinders enquiry relates to.

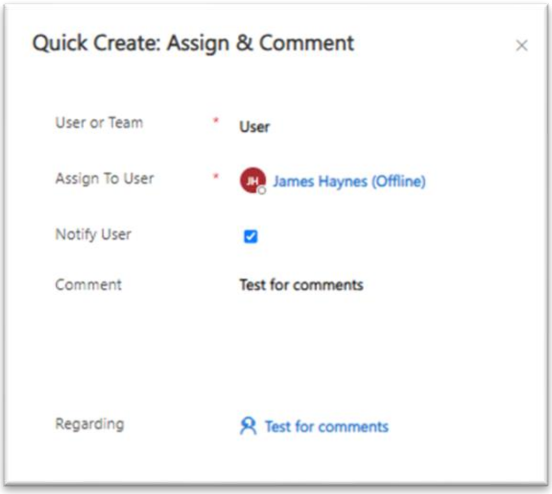
4.2.4 Assign & Comment or Assign Feature

4.2.4.1 Assign & Comment

Allows you to Assign the case to another Team or User and allows us to add some metadata on why we are assigning the case on.



Team Assignment view



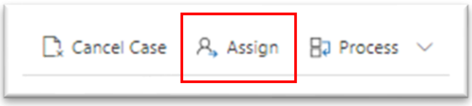
User Assignment view

***Note**: If assigning to a user, you can click on the notify user to advise them of the assignment being changed to them.*

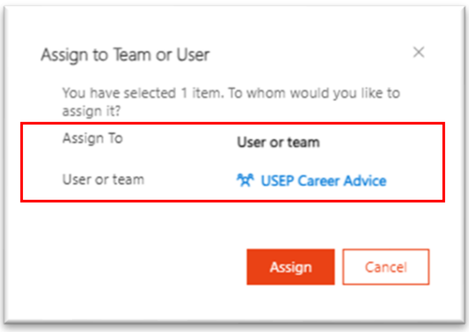
4.2.4.2 Assign feature.

Allows you to Assign to another User or Team without any comments.

1. Click on **Assign** (at the top of your screen in the *Action* menu)



2. A window will pop-up and you will need to click on **Assign To** as the default will be **Assign to *'Me'***

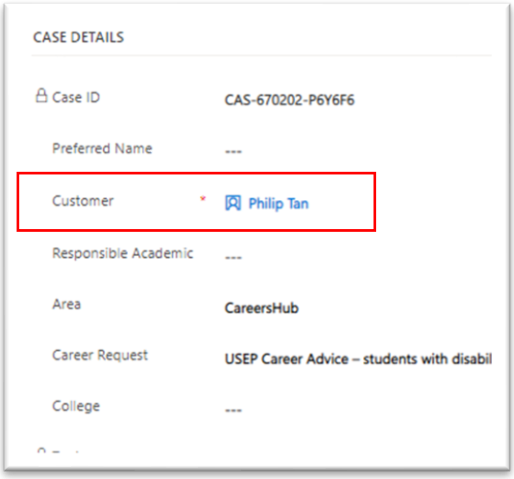


3. When you click on **Assign To**, this will change to **User or team.**
4. Click in the User or team field and you'll be able to search the contacts list.
5. Once you have selected the user or team, click on **Assign**.

4.3 Portal Cases

Customer field

Once you change the user/customer field in the **Case Details**, the user that you have changed to, will be able to view the case details in their Ask Flinders portal.



To change the **Customer** field:

1. Click on **Customer**
2. Search for the **new user/customer**
3. Click on **Save** (at the top of your screen in the *Action* menu).

For the comments to be visible to the new user/customer, there are a couple of steps that need to be completed first before the comments become visible in the Ask Flinders portal.

1. click on the **Open record** icon in the comments.

2. Click on **Send** (at the top of your screen in the *Action* menu).

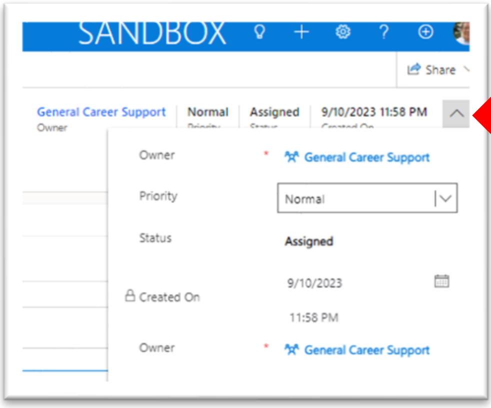
You have now made the public comment visible to the user/customer who is now able to view the comments in their *Ask Flinders* portal. Please note that the comments are now in a "read only" state and any changes can only be made by you.

The student will not be able to make any changes to any of the comments in the portal.

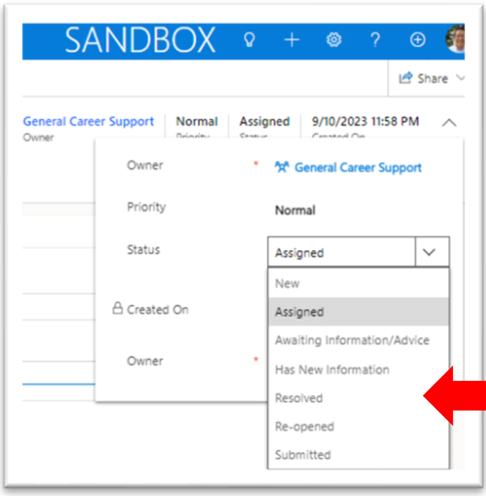
4.4 Resolving Cases

4.4.1 Closing cases

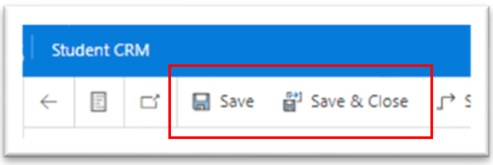
1. Open the case that you want to resolve.
2. Click on the Chevron in the top right of your screen.



3. Click on the Chevron (down facing arrow) in the *Status* field.



4. Select **Resolved** from the list.
5. Click on **Save** or **Save & Close** in the action menu.



6. This will now drop the case out of your Active cases and close.

*Note: If you need to reactivate the case, you can do so by going to **Resolved cases**, find the case in question, open the case and in the Action menu, you'll see the **Reactivate Case** option.*