



South African Weather Service

**Case Management
Training Manual**

Document Review and Distribution

Revision history

Version	Author	Date	Revision	Email address
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1.3				
1.4				

Document Distribution

This document will be distributed to all course attendees.

Version	Name	Date	Email Address

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1 INTRODUCTION

Welcome to the world of NetSuite.

In this course, you will learn how to manage cases within the SAWS environment. You will become familiar with the layouts and menu paths of NetSuite. The NetSuite application runs within a browser window i.e. Internet Explorer e.c.t. When you log into NetSuite, you will see a set of tabbed pages. NetSuite calls these tabbed pages a “center”. The role that will be assigned to you will determine which “center” you will be able to see.

Upon completion of this module, you will be able to:

- Log-in and navigate NetSuite successfully
- Create a Case
- List created cases
- Place a Case on-hold
- Escalate a Case
- Handle Case Metrics
- Case Resolution
- Saved Searches of Service Level Agreement Hours
- Case Reports

2 CASE MANAGEMENT

Cases are created in 3 ways:

- A support rep creates a case record in NetSuite for customer who calls in
- A user completes an online case form.
- Email case capture

2.1 Create a case

Step 1 – Navigate to case > Support Services> Cases > New

Case List Search More

Save **Reset** **Cancel**

Case Information

<p>NUMBER To Be Generated</p> <p>PROFILE * SOUTH AFRICAN WEATHER SERVICE</p> <p>SUBJECT * <input type="text"/></p> <p>TERRITORY <input type="text"/></p> <p>SERVICE CATEGORY <input type="text"/></p> <p>SUB-CATEGORY <input type="text"/></p> <p>REQUESTOR * <Type then tab></p>	<p>EMAIL(S) <input type="text"/></p> <p>PHONE <input type="text"/></p> <p>ASSIGNED TO <input type="text"/></p> <p>STATUS * Unassigned</p> <p>PRIORITY Low</p> <p>ORIGIN <input type="text"/></p>	<p>INCIDENT DATE * 15/7/2019</p> <p>INCIDENT TIME * 2:18 pm</p> <p>TYPE <input type="text"/></p> <p>INBOUND EMAIL ADDRESS <input type="text"/></p> <p>SLA HOURS <input type="text"/></p> <p>ORGANIZATION <input type="text"/></p>
---	--	---

Step 2 fill in the mendatory fields

- Enter the Subject of the case
 - Select relevant Territory
 - Select relevant Service Category
 - Select relevant Sub- Category
 - Select the relevant Requestor
- You can Request on the behalf of someone

Step 3 Navigate to the communication Subtab

Step 4 Under Mesage Enter a brief description of what the case is about



Communication Comments Escalations Resolution

Incoming Message

SEND TO CUSTOMER

MESSAGE

Outgoing Message from Support Rep

INTERNAL ONLY

REPLY

Type text and format it using the toolbar.

Communication Comments Metrics Escalations Resolution On Hold / Rejection Reason(s)

Messages

VIEW

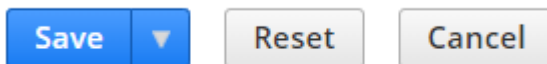
Case Default

Email Attach Letter PDF Fax Refresh View History Customise View

#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC
No records to show.							

Step 5 Click Save

The case will be logged



NOTE:

- You will Receive a Notification in your outlook as a Requestor

Reply Reply All Forward



Mon 2019/07/15 19:42

SOUTH AFRICAN WEATHER SERVICE (eohsaws@gmail.com) <system@sent-via.netsuite.com>

[SANDBOX] Case # 97 Created: test (originally To: Kutloano.Rauane@gmail.com) (originally envelope recipients: Kutloano.Rauane@gmail.com)

To Kutloano Rauane

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Thank you for contacting SOUTH AFRICAN WEATHER SERVICE Customer Support.

Your request for assistance has been received. Case #97 - "test" has been created for you. A member of our customer care team will respond to your case as soon as possible.



[Click here to update the Case online](#), or reply to this email

Message History

hi

SOUTH AFRICAN WEATHER SERVICE is powered by NetSuite — One System. No Limits.

Step 1 Click the link on Email to get in touch with the Support Rep

- Will be redirected to the case response page to close the case
- To send Message
- To track your Case Activity
- The user can click the Submit & Close button to close the case

Case: 254 testing (9 Kutloano Rauane)

Submit **Submit & Close Case** Reset

Subject testing	Priority Critical
Number 254	Service Cat Core Application
Incident Date 24/8/2019	SLA Hours 2
Incident Time 5:10 pm	Territory DRR
Created Date 24/8/2019 5:11 pm	Assigned To Operations
Requestor 9 Kutloano Rauane	Phone 0111111111
Email(s) kutloano.rauane@eoh.com	Origin
Status Assigned	Type

Interactions

* Message

Support Notification Email:

- To customers when a new case is created
- To customers when their case has been updated or replied to
- To customers when their case has been closed as a result of the all associated issues being closed
- To support reps when they have been assigned to a case
- To support reps when a case they are assigned to has been updated
- To employees when a case has been escalated to them

2.2 Resolving a Case

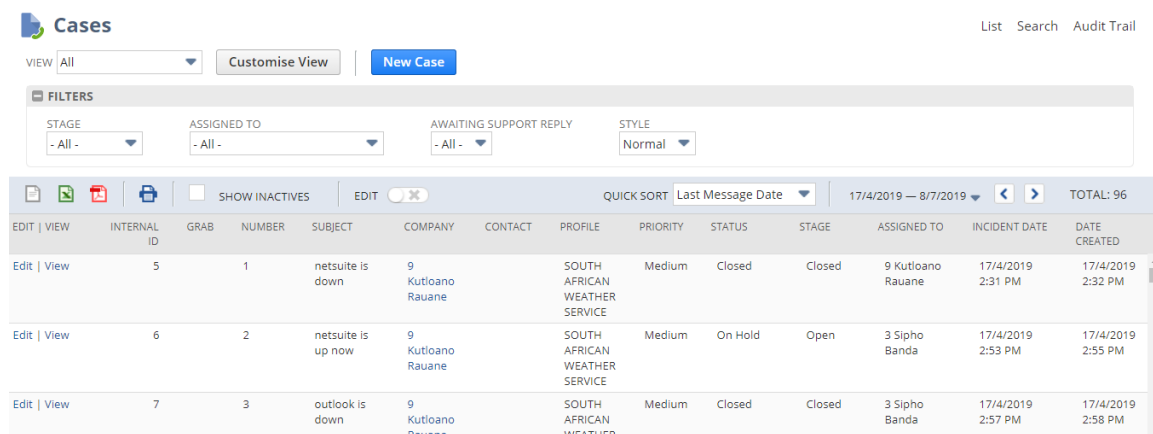
When a support rep enters a case for a customer calling in or a customer submits a case with an online case form, the new case is added to the cases list. The case list displays all open cases by default and can be filtered to show what is suitable for you

NOTE

- Case that are received using the Email case capture will be a Manual process. A support Rep has to fill in the case form after the case has been logged.

Step 1 – Navigate to case > Support Services> Cases

The Case list screen will display to view cases



Cases List Search Audit Trail

VIEW: All Customise View New Case

FILTERS

STAGE: - All - ASSIGNED TO: - All - AWAITING SUPPORT REPLY: - All - STYLE: Normal

SHOW INACTIVES: EDIT: QUICK SORT: Last Message Date | 17/4/2019 — 8/7/2019 | TOTAL: 96

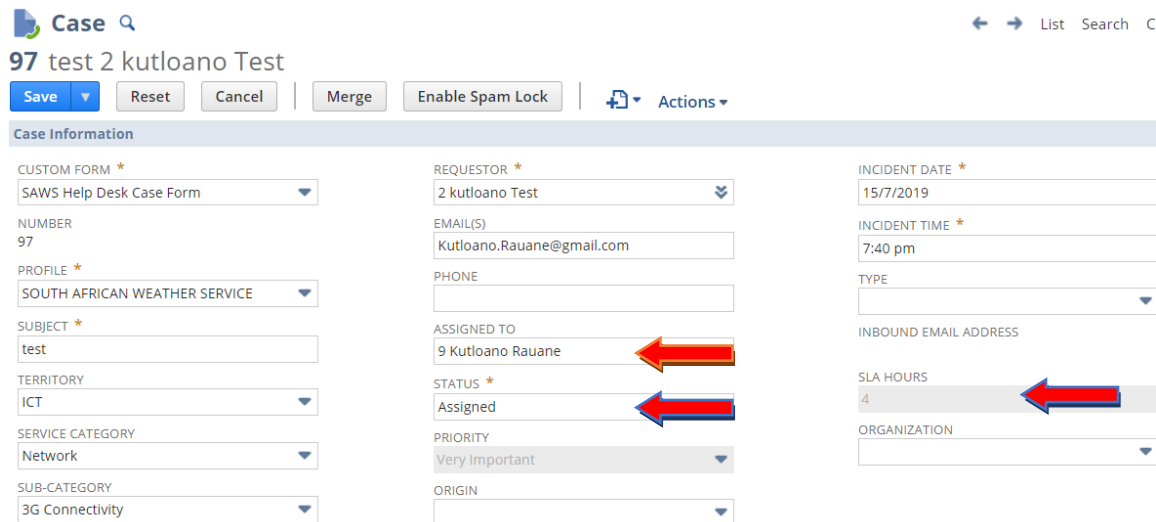
EDIT VIEW	INTERNAL ID	GRAB	NUMBER	SUBJECT	COMPANY	CONTACT	PROFILE	PRIORITY	STATUS	STAGE	ASSIGNED TO	INCIDENT DATE	DATE CREATED
Edit View	5		1	netsuite is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	9 Kutloano Rauane	17/4/2019 2:31 PM	17/4/2019 2:32 PM
Edit View	6		2	netsuite is up now	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	On Hold	Open	3 Sipho Banda	17/4/2019 2:53 PM	17/4/2019 2:55 PM
Edit View	7		3	outlook is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	3 Sipho Banda	17/4/2019 2:57 PM	17/4/2019 2:58 PM

Step 2 Click Edit to Modify the case and Grab the case

Note

- Grabbing is a quick way to assign a case to yourself. When you assign a case to yourself, you can respond to the customer. You have to be a support representative in order for the grab link to be available.

The case screen will be displayed to make changes on the case



The screenshot shows the 'Case Information' section of a web application. The case title is '97 test 2 kutloano Test'. The interface includes several input fields and dropdown menus, with red arrows pointing to specific fields: 'ASSIGNED TO' (showing '9 Kutloano Rauane'), 'STATUS' (showing 'Assigned'), and 'SLA HOURS' (showing '4').

Case Information		
CUSTOM FORM *	REQUESTOR *	INCIDENT DATE *
SAWS Help Desk Case Form	2 kutloano Test	15/7/2019
NUMBER	EMAIL(S)	INCIDENT TIME *
97	Kutloano.Rauane@gmail.com	7:40 pm
PROFILE *	PHONE	TYPE
SOUTH AFRICAN WEATHER SERVICE		
SUBJECT *	ASSIGNED TO	INBOUND EMAIL ADDRESS
test	9 Kutloano Rauane	
TERRITORY	STATUS *	SLA HOURS
ICT	Assigned	4
SERVICE CATEGORY	PRIORITY	ORGANIZATION
Network	Very Important	
SUB-CATEGORY	ORIGIN	
3G Connectivity		

NOTE:

- The case is automatically assigned to a Group
- Status has changed to Assigned
- SLA is determined by the Territory, Service Category and Sub- Category
- Priority is determined by the SLA
- Can Reassign the case by changing the name in the Assigned to Field
(Can only assign cases to people who are Marked as Support Reps)



Step 3 Navigate to the communication Subtab

Communication Comments Metrics Escalations Resolution On Hold / Rejection Reason(s)

Incoming Message

SEND TO CUSTOMER

MESSAGE

testing 2

NEW MESSAGE

Outgoing Message from Support Rep

INTERNAL ONLY

REPLY

Type text and format it using the toolbar.

Messages

VIEW

Case Default

Email Attach Letter PDF Fax Refresh View History Customise View

#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC	FILES	ATTACHMENTS	INTER
1	View	24/8/2019 5:38 PM	4886 Kufloano Rauane	testing 2	Yes			No		No

NOTE :

- Incoming Message from the User will be displayed on the right
- Outgoing Message from the Rep to reply to the message
- **Send to Customer/User** Check this box to email your reply to the customer's email as entered in the Email field above
- **INTERNAL ONLY** Check this box if you do not want your reply to be seen by customers.
- **New Message** - When you check this box, Message field clears so that you can enter the new message or note and does not send an Email
- Every Message sent from and to will be recorded on Case

Step 5 Click Save

2.3 Placing a case on Hold

Step 1 Click View on the case you working on

Cases List Search Audit Trail

VIEW: All Customise View New Case

FILTERS

STAGE: - All - ASSIGNED TO: - All - AWAITING SUPPORT REPLY: - All - STYLE: Normal

SHOW INACTIVES: EDIT:

QUICK SORT: Last Message Date | 17/4/2019 — 8/7/2019 | TOTAL: 96

EDIT	VIEW	INTERNAL ID	GRAB	NUMBER	SUBJECT	COMPANY	CONTACT	PROFILE	PRIORITY	STATUS	STAGE	ASSIGNED TO	INCIDENT DATE	DATE CREATED
		5		1	netsuite is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	9 Kutloano Rauane	17/4/2019 2:31 PM	17/4/2019 2:32 PM
		6		2	netsuite is up now	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	On Hold	Open	3 Sipho Banda	17/4/2019 2:53 PM	17/4/2019 2:55 PM
		7		3	outlook is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	3 Sipho Banda	17/4/2019 2:57 PM	17/4/2019 2:58 PM

Step 2 Click Request to place Status on hold

Case 256 testing 4885 Kutloano Rauane

Edit Back Merge Enable Spam Lock Grab Request to place case On Hold Actions

Case Information

NUMBER 256	REQUESTOR 4885 Kutloano Rauane	PRIORITY Very Important
PROFILE SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) kutloanooutwa@gmail.com	INCIDENT DATE 24/8/2019 5:37 pm
SUBJECT testing	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO Operations	SLA HOURS 4
SERVICE CATEGORY Network	STATUS Assigned	APPROVER
SUB-CATEGORY 3G Connectivity		

Partner Case

ORGANIZATION	PARTNER	PARTNER/CLIENT SUB CATEGORY
KEY CLIENTS	PARTNER SERVICE CATEGORY	

Communication Comments Metrics Escalations Resolution On Hold / Rejection Reason(s)

Messages

VIEW: Case Default

Email Attach Letter PDF Fax Refresh View History Customise View

#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC	FILES	ATTACHMENTS	IN
1		24/8/2019 5:37 PM	4885 Kutloano Rauane	testing	Yes			No		No

- You will be redirected to the On hold Reason screen where you will capture the reason

On Hold Reason

[Save](#) [Cancel](#) [Reset](#)

REASON TYPE
On Hold Request

ENTER REASON

CASE NUMBER
256 testing

REASON SUPPLIED BY
9 Kutloano Rauane

REASON DATE
25/8/2019

Step 3 Enter Reason

Step 4 Save

On Hold Reason

[Edit](#) [Back](#)

REASON TYPE
On Hold Request

ID
24

DATE CREATED
25/8/2019 3:45 pm

ENTER REASON
testing

CASE NUMBER
256 testing

REASON SUPPLIED BY
9 Kutloano Rauane

REASON DATE
25/8/2019

Active Workflows [Workflow History](#)

VIEW
Default

[Customise View](#) [Refresh](#)

WORKFLOW	CURRENT STATE	DATE ENTERED WORKFLOW	DATE ENTERED STATE	OPTIONS
No records to show.				

[Edit](#) [Back](#)

Step 5 Click on the Case Number

(Takes you back to the case)

Case 256 testing 4885 Kutloano Rauane ← → List Search

[Edit](#) [Back](#) [Merge](#) [Enable Spam Lock](#) [Grab](#) [Approve \(Set Case On Hold\)](#) [Reject \(Do not place case On Hold\)](#) [Print](#) [Share](#) [Actions](#)

Case Information

NUMBER 256	REQUESTOR 4885 Kutloano Rauane	PRIORITY Very important
PROFILE SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) kutloanooutlwa@gmail.com	INCIDENT DATE 24/8/2019 5:37 pm
SUBJECT testing	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO Operations	SLA HOURS 4
SERVICE CATEGORY Network	STATUS Awaiting Approval	APPROVER 4 Shuaib Abed
SUB-CATEGORY 3G Connectivity		

Partner Case

ORGANIZATION	PARTNER	PARTNER/CLIENT SUB CATEGORY
KEY CLIENTS	PARTNER SERVICE CATEGORY	

Communication [Comments](#) [Metrics](#) [Escalations](#) [Resolution](#) [On Hold / Rejection Reason\(s\)](#)

Messages

VIEW
Case Default

[Email](#) [Attach](#) [Letter](#) [PDF](#) [Fax](#) [Refresh](#) [View History](#) [Customise View](#)


#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC	FILES	ATTACHMENTS	INTERNAL ONLY	REMOVE
1	View	24/8/2019 5:37 PM	4885 Kutloano Rauane	testing	Yes			No		No	Remove

NOTE:


- Placing a Case On Hold goes for Approval
- Manager needs to Approve or Reject
- Provide a reason why the case is on Hold
- Placing a case On Hold pauses time
- Status changes to Awaiting Approval

If Rejected status changes to rejected meaning you have to work on the case

- Status remains on Assigned
- Navigate to the On Hold/Rejection reasons subtab to view the reason

Case 

257 testing 4886 Kutloano Rauane

[Edit](#)
[Back](#)
[Merge](#)
[Enable Spam Lock](#)
[Grab](#)
[Request to place case On Hold](#)

[Actions](#)

Case Information

NUMBER 257	REQUESTOR 4886 Kutloano Rauane	PRIORITY Very Important
PROFILE SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) kutloano.Rauane@eoh.com	INCIDENT DATE 24/8/2019 5:38 pm
SUBJECT testing	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO Application Support	SLA HOURS 4
SERVICE CATEGORY Network	STATUS Assigned	APPROVER 4 Shuaib Abed
SUB-CATEGORY 3G Connectivity		

Partner Case

ORGANIZATION	PARTNER	PARTNER/CLIENT SUB CATEGORY
KEY CLIENTS	PARTNER SERVICE CATEGORY	

[Communication](#)
[Comments](#)
[Metrics](#)
[Escalations](#)
[Resolution](#)
[On Hold / Rejection Reason\(s\)](#)

On_Hold Reasons

EDIT	ID	REASON TYPE	REASON	ACTIONED BY
Edit	25	On Hold Rejection	testing	9 Kutloano Rauane

- If Approved the Status changes to On Hold

Case **256 testing 4885 Kutloano Rauane**

[Edit](#) [Back](#) [Merge](#) [Enable Spam Lock](#) [Grab](#) [Take Off Hold](#) [Print](#) [Share](#) [Actions](#)

Case Information

NUMBER 256	REQUESTOR 4885 Kutloano Rauane	PRIORITY Very Important
PROFILE SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) kutloanoutwa@gmail.com	INCIDENT DATE 24/8/2019 5:37 pm
SUBJECT testing	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO Operations	SLA HOURS 4
SERVICE CATEGORY Network	STATUS On Hold	APPROVER 4 Shualb Abed
SUB-CATEGORY 3G Connectivity		

Partner Case

ORGANIZATION	PARTNER	PARTNER/CLIENT SUB CATEGORY
KEY CLIENTS	PARTNER SERVICE CATEGORY	

Communication | [Comments](#) | [Metrics](#) | [Escalations](#) | [Resolution](#) | [On Hold / Rejection Reason\(s\)](#)

Messages

VIEW
Case Default

[Email](#) [Attach](#) [Letter](#) [PDF](#) [Fax](#) [Refresh](#) [View History](#) [Customise View](#)

#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC	FILES	ATTACHMENTS	INTERNAL ONLY
1	View	24/8/2019 5:37 PM	4885 Kutloano Rauane	testing	Yes			No		No

- Take off on hold

Case **256 testing 4885 Kutloano Rauane**

[Save](#) [Cancel](#) [Reset](#) [Merge](#) [Enable Spam Lock](#) [Take Off Hold](#)

Case Information

NUMBER 256	REQUESTOR * 4885 Kutloano Rauane	INCIDENT DATE * 24/8/2019
PROFILE * SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) kutloanoutwa@gmail.com	INCIDENT TIME * 5:37 pm
SUBJECT * testing	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO 9 Kutloano Rauane	SLA HOURS 4
SERVICE CATEGORY Network	STATUS * Assigned	APPROVER 4 Shualb Abed
SUB-CATEGORY 3G Connectivity	PRIORITY Very Important	

Partner Case

ORGANIZATION	PARTNER	PARTNER/CLIENT SUB CATEGORY
KEY CLIENTS	PARTNER SERVICE CATEGORY	

Communication | [Comments](#) | [Metrics](#) | [Escalations](#) | [Resolution](#) | [On Hold / Rejection Reason\(s\)](#)

Incoming Message | **Outgoing Message from Support Rep**

SEND TO CUSTOMER
 MESSAGE

INTERNAL ONLY
 REPLY

- The status goes back to Assigned

2.4 Case Escalation

Step 1 Click Edit to modify the case

Cases List Search Audit Trail

VIEW: All Customise View New Case

FILTERS

STAGE: - All - ASSIGNED TO: - All - AWAITING SUPPORT REPLY: - All - STYLE: Normal

SHOW INACTIVES EDIT

QUICK SORT: Last Message Date | 17/4/2019 — 8/7/2019 | TOTAL: 96

EDIT VIEW	INTERNAL ID	GRAB	NUMBER	SUBJECT	COMPANY	CONTACT	PROFILE	PRIORITY	STATUS	STAGE	ASSIGNED TO	INCIDENT DATE	DATE CREATED
Edit View	5		1	netsuite is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	9 Kutloano Rauane	17/4/2019 2:31 PM	17/4/2019 2:32 PM
Edit View	6		2	netsuite is up now	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	On Hold	Open	3 Sipho Banda	17/4/2019 2:53 PM	17/4/2019 2:55 PM
Edit View	7		3	outlook is down	9 Kutloano Rauane		SOUTH AFRICAN WEATHER SERVICE	Medium	Closed	Closed	3 Sipho Banda	17/4/2019 2:57 PM	17/4/2019 2:58 PM

Step 2 Navigate to the escalation SubTab

Step 3 Enter a Message for the person/ group you are Escalating the case to

Communication **Comments** Metrics **Escalations** Resolution On Hold / Rejection Reason(s)

ESCALATION MESSAGE

testing |

History Escalate To

DATE/TIME	ACTION	FROM	ESCALATION ASSIGNMENT
No records to show.			

Step 4 Click **Escalating to** and Select the Person/Group

ESCALATION MESSAGE

- 3 Sipho Banda
- 8 Paco Cervantes
- 9 Kutloano Rauane
- 14 Shuaib Abed

✓ Add ✕ Cancel + Insert 🗑 De-Escalate

Step 5 Click Add

Communication Comments Metrics **Escalations** Resolution On Hold / Rejection Reason(s)

ESCALATION MESSAGE
testing

History **Escalate To**

De-Escalate All

ESCALATEE *	EMAIL
Operations	ictn@weathersa.co.za

✓ Add ✕ Cancel + Insert 🗑 De-Escalate

Step 6 Click Save

NOTE:

- There will be a pop-up alerting you that the case status will change to escalated


5027500-sb1.app.netsuite.com says

The case status is not set to escalated, but employees are still listed in the "Escalate" tab.

The status will be changed to the default status for escalated cases if you proceed.




OK
Cancel

Step 7 Click OK

NUMBER 97	REQUESTOR 2 kutloano Test	ORIGIN
PROFILE SOUTH AFRICAN WEATHER SERVICE	EMAIL(S) Kutloano.Rauane@gmail.com	INCIDENT DATE 15/7/2019 7:40 pm
SUBJECT test	PHONE	TYPE
TERRITORY ICT	ASSIGNED TO 9 Kutloano Rauane	INBOUND EMAIL ADDRESS
SERVICE CATEGORY Network	STATUS Escalated 	SLA HOURS 4
SUB-CATEGORY 3G Connectivity	PRIORITY Very Important	ORGANIZATION
APPROVER Shuaib Abed		

NOTE:

- You will receive a notification in your Outlook

 Reply  Reply All  Forward




Mon 2019/07/15 21:45

SOUTH AFRICAN WEATHER SERVICE (eohsaws@gmail.com) <system@sent-via.netsuite.com>

[SANDBOX] Case # 97 Escalated: "test" (originally To: siphobanda@eoh.com)

To Kutloano Rauane

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Case #97 has been escalated to you by Kutloano Rauane

Case Number	97
Case Subject	test
Customer	2 kutloano Test
Contact	
Creation Date	15/7/2019, 7:40:00 PM (GMT+02:00) Harare, Pretoria
Assigned To	9 Kutloano Rauane
Case Type	
Case Priority	Very Important
Case Status	Escalated

Escalation Message



[Click here to update the Case online](#), or reply to this email

NOTE:

- You can click the link and you will be redirected to the case

2.5 Case Metrics

A comprehensive set of metrics for each support case, aimed at providing support managers with greater visibility on how effectively a case is being handled. These metrics are accessible by clicking on the Metrics subtab of a case record.

Step 1 Navigate to Metrics Subtab

Communication	Comments	Metrics	System Information	Escalations	Resolution
Duration					
TIME ELAPSED 2 hrs. 4 mins.		TIME ON HOLD 25 mins. 23 secs.		INITIAL RESPONSE TIME 1 hr. 12 mins.	
TIME OPEN 1 hr. 38 mins.		TIME TO CLOSE			
Basic Information					
DATE CREATED 15/7/2019 7:41 pm		DATE LAST REOPENED		LAST MODIFIED DATE 15/7/2019 9:45 pm	
FIRST UPDATED 15/7/2019 7:41 pm		DATE CLOSED			
Interactions					
LAST MESSAGE DATE 15/7/2019 8:53 pm					

2.6 Case Resolution

Step 1 Navigate to Resolution Subtab

Communication	Comments	Metrics	System Information	Escalations	Resolution
SOLUTION			DATE RESOLVED		
ROUTE CAUSE			RESOLVED BY		
COMMENTS					
<div style="display: flex; justify-content: space-between; align-items: center;"> Edit Back Merge Enable Spam Lock 📄 + Actions </div>					



Step 2 Click Edit

Communication Comments Metrics System Information Escalations Resolution

SOLUTION

ROUTE CAUSE

RESOLVED BY

COMMENTS

DATE RESOLVED

Save Cancel Reset Merge Enable Spam Lock Actions

Step 3 Fill in the Fields

- Solution
- Route Cause
- Date resolved(Default to system date)
- Resolved By
- Comments if any
- Change Status to Resolved

Step 4 Click Save

3 ONLINE CASE FORM

Online case forms make it easy for customers to contact you with any enquiries, and your service team to resolve problems and offer customers the best service possible

- The Forms will be located on the South African Weather Service website for use.



Service Case form

* Subject

* Email

* First Name

* Last Name

Phone Number

Territory

Service Category

Sub-Category

* Description

NOTE:

- We have 6 Online case forms
 - Service/change request (Internal)
 - General Inquires (Public)
 - Partner/Client form (Partners)
 - Incident form (Internal)
 - Climate date Request
 - Complaints and Compliments

4 REPORTS

Step 1 Navigate to Case > Reports

- 4.1 Open Case Analysis Summary report
- 4.2 Open Case Analysis Detail Report
- 4.3 Closed Case Analysis Summary report
- 4.4 Closed Case Analysis Detail Report
- 4.5 Open Case Escalation Summary Report
- 4.6 Open Case Escalation Detail Report
- 4.7 Closed Case Escalation Summary Report
- 4.8 Closed Case Escalation Detail Report
- 4.9 Case Activity by Support Rep Summary report
- 4.10 Case Reports by Category Details
- 4.11 On Hold Case Report
- 4.12 Case Reports by Territory
- 4.13 Case Reports by Statuses

Note

- On the bottom of the Report you can specify and choose the range to as of when
- Click More to show other Options
- Click Refresh for the new data



A screenshot of a report filter bar. It includes a 'DATE' dropdown menu set to '(Custom)', a 'FROM' field with '1/8/2019', a 'TO' field with '31/10/2019', a 'MORE' button, a search field with 'Find...', and navigation arrows. Below the filter bar is a blue 'Refresh' button and a set of icons for report actions.

