


## Creating or importing Case types

Case types are containers that defines a case, suggests actions, provides possible canned response templates, and details the outcomes or closures.

### Creating a new case type

To create a new case type,

1. Go to Configure -> Case types -> click on the  icon
2. Enter a suitable name for the case type and click Save. This opens the Edit Case type screen that facilitates you to package the actions, closures, forms and responses required to deal with the case.

**New case type**

Name

Sample case type

Save Cancel

3. Tick **Time to live** to allow auto deletion of related conversations and enter the number of days after which the deletion must be completed.
4. In the Action panels, select the action panels you wish to include with the case type. The selected ones will appear on the right. Click Save before you proceed to the next tab.

Edit case type: Sample case type

Name

Sample case type

Time to live

Time until the case and its related conversations are deleted.

☒ Enabled

14

Days

Action panels Closures Forms Canned responses

Available

Spørgsmål til Betaling

Stigs action panel

Systembolaget panel

Test Eng TTT

Think - action panel

Top ranked products

Training panel

Transcore - action panel

TV

<<

>>

Selected

Test

Training panel

Save Cancel Delete

5. Select the **closure/s** that would be appropriate for the actions listed above and save it

Action panels

Closures

Forms

Canned responses

Available

Problem solved

Prosecco

Purchased HP printer

senzum fixar

Senzum löst problemet

Sky - escalated to manager

Sogeti - Closing up shop

Spørgsmål besvaret

Stig hjalp kund

<<

>>

Selected

Sample closure

Save

Cancel

Delete

6. Select the relevant canned responses to help the agent speed up the response time

Action panels

Closures

Forms

Canned responses

Available

Registrera företag steg 1

Sales needs Enghouse

Senzum sales

Serovital - hair Regeneres

Skicka länk

Sky - canned respons

Sogeti canned meat

Special Offer

Starta om?

<<

>>


Selected

Sample canned response

Save

Cancel

Delete

7. Save and press the  icon to go back to the main list and view the case type created.

To delete a case type, search by its name from the search bar or look up from the list and click on it to open. Press **Delete** in the **Edit Case type** screen and confirm your decision.