

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

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

Time to live
Time until the case and its related conversations are deleted.

Enabled 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

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

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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?

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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.