



**Customization: Automated Email
Reminders for Pending Cases**

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Business Problem and Solution

While many cases are closed either by support staff or the users after a solution is found to the problem, we have observed that many cases remain in Pending status. In the majority of such cases the user did get the support he/she was looking for but didn't update the case, confirming that case is resolved and can be closed. In this situation, you do not want to see hundreds of cases in Pending status but would rather notify users by automatically sending reminder emails and finally closed.

This customization helps setting up rules to send predefined reminder email and finally close in event of consistent inactivity on a case. These rules ensures that you can automate a reminder to be dispatched to users having Pending Cases at pre-defined intervals to request for an update. If no update is received within specified interval, case is marked as closed.

Functional Design

This article explains how to implement Automated Email Reminders for Pending Cases with consistent inactivity

This solution monitors cases in “Pending Customer” status and automatically send up to 3 email reminders to the contact on the case at given intervals. If the case remain in ‘customer pending’ state without any further activity by the client, the system will send a 4th email and automatically close the case. This will be a custom processing screen and can be automated via scheduler.

Solution records each email that was sent in the activity tab and updates the last activity date/time of the case (Screen CR306000).

The reminder interval and final case closure email interval is configurable based on severity of the case and amount time the case have been in Pending State without client updates.

Email templates (Screen SM204003) are configurable (CR101000) for each sequence of the email.

Technical Implementation

Complete source code of Extension Library is available in PX.AutomatedCaseReminder.KB.Ext folder. **PXAutomatedCaseReminderKBExtPkg.zip** is a deployment package containing database scripts, customized pages, sitemap and compiled Extension Library.

Database

CRCase

Solution will be tracking the reminder count via integer type of user field **UsrReminderCount**. E-mail notifications will be sent based on value of this field. It will be incremented each time E-mail notification is sent.

CRSetup

These user fields are used to specify the Notification templates used for each reminder and closing notes.

CRClassSeverityTime

These user fields are used to specify the Reminder intervals.

Data Access Class

CRCase

Representing user fields.

CRSetup

Representing user fields.

CRClassSeverityTime

Representing user fields.

AutoRemindCaseInfo

This is a Projection DAC. And is having data from CRCase, CRClassSeverityTime, BAccount, Contact, Contract, Location tables.

Graph/BLC

CaseReminderProcessing

This is a Graph class responsible for processing Automated Reminders for pending Cases. It will be displaying the Cases which are Pending and qualify to send Automated Reminder based on interval setup for case class and severity.

Pages

Case Classes (Screen: CR206000)

Add newly added user fields to specify reminder intervals.

Severity	* Reaction Time	* Reaction Time for Reminder 1	* Reaction Time for Reminder 2	* Reaction Time for Reminder 3	* Reaction Time for Auto Close
High	0 d 02 h 00 m	0 d 02 h 00 m	1 d 00 h 00 m	2 d 00 h 00 m	3 d 00 h 00 m
Low	1 d 00 h 00 m	1 d 00 h 00 m	3 d 00 h 00 m	6 d 00 h 00 m	7 d 00 h 00 m
Medium	0 d 03 h 00 m	1 d 00 h 00 m	2 d 00 h 00 m	4 d 00 h 00 m	5 d 00 h 00 m

Customer Management Preferences (Screen: CR101000)

Add a new tab **Case Preferences**. And add newly added user fields to specify template to be used while sending Automated reminders.

New York - Customer Management Preferences

General Settings | Opportunity Probabilities | Campaign Types | **Case Preferences**

AUTOMATED EMAIL REMINDERS AND CASE CLOSURE FOR PENDING CASES

Notification Template for Reminder 1:


Notification Template for Reminder 2:



Notification Template for Reminder 3:




Notification Template for Auto Close:


Send Case Reminder (Screen: CR509020)

A new processing page to send automated reminders for pending case.

 New York ▾ Send Case Reminder ★

 PROCESS PROCESS ALL  ▾

 REFRESH  ADJUST  EXPORT

	<input type="checkbox"/>	Case ID	Subject	Status	Reason	Severity	Partner Name
>	<input type="checkbox"/>	000002	Booklet Advertisement Affaire	Pendin...	More I...	Medium	Caribbean Secretary Online

This can be automated via schedules toolbar button on this screen.

Deployment Package

* Project Name: PXAutomatedCaseReminder

Description:

C

+

X

ADD ▾

EDIT

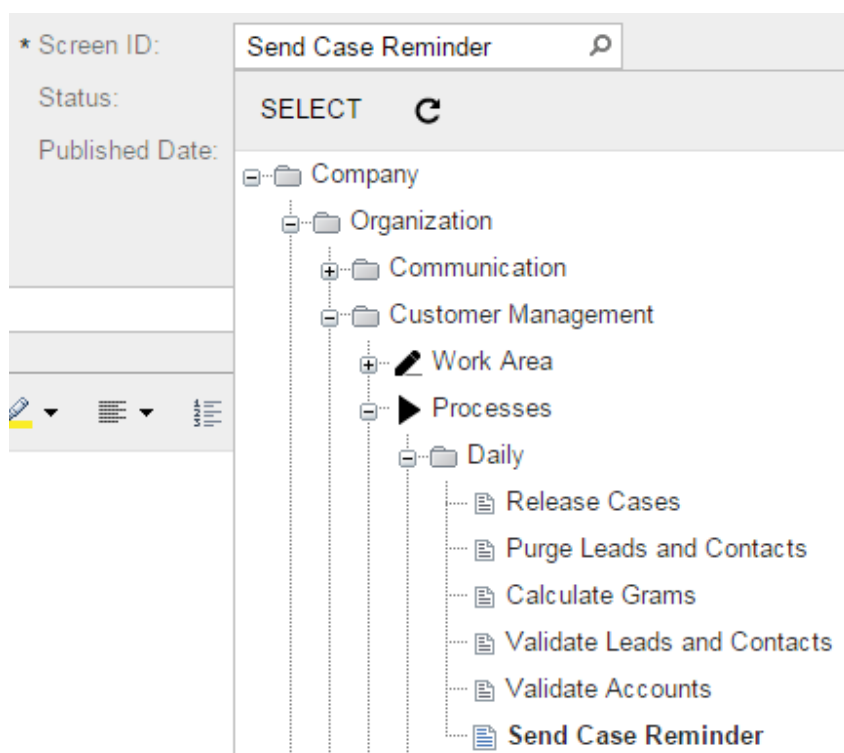
REFRESH DBTABLES

CHECKIN FILES...

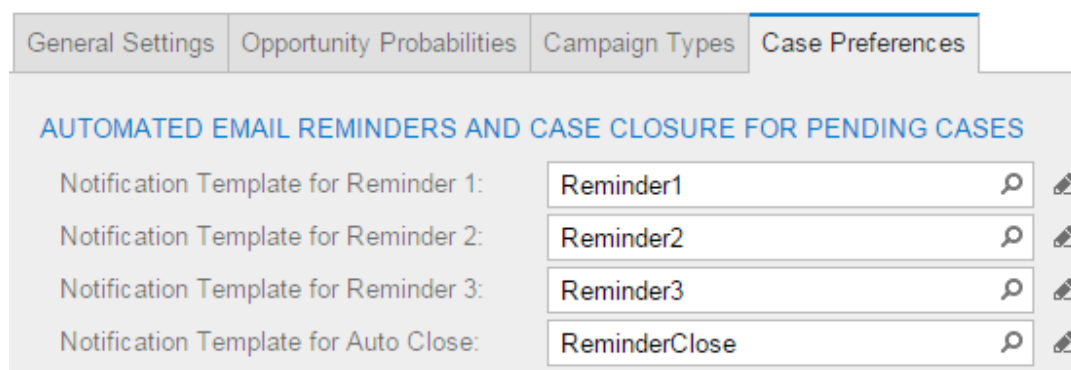
		Object Name	Type	Description	Excluded
>		Bin\PX.AutomatedCaseReminder.KB.Ext.dll	File		<input type="checkbox"/>
		Bin\PX.AutomatedCaseReminder.KB.Ext.pdb	File		<input type="checkbox"/>
		Pages\CR\CR509020.aspx	File		<input type="checkbox"/>
		Pages\CR\CR509020.aspx.cs	File		<input type="checkbox"/>
		~/pages/cr/cr101000.aspx	Page		<input type="checkbox"/>
		~/pages/cr/cr206000.aspx	Page		<input type="checkbox"/>
		Send Case Reminder	SiteMapNode		<input type="checkbox"/>
		updateCRCase	Sql		<input type="checkbox"/>
		updateCRClassSeverityTime	Sql		<input type="checkbox"/>
		updateCRSetup	Sql		<input type="checkbox"/>

Setup Instructions

1. Navigate to Customization Projects screen (SM204505)
2. Import attached customization project - **PXAutomatedCaseReminderKBExtPkg.zip**
3. Select and publish this customization.
4. Once published, navigate to **Notification Templates** screen (SM204003) and create templates for automated reminders and closing note. Make sure to specify newly created processing screen as ScreenID.



5. Navigate to **Customer Management Preferences** screen (CR101000) and specify notification templates to be used.



6. Navigate to Case Class screen (CR206000) and specify intervals for each reminder.

* Case Class ID: SOFTWARE - Softw ☒ Internal

* Description: Software Related Issues

Details **Reaction** Labor Items Attributes

Severity	* Reaction Time	* Reaction Time for Reminder 1	* Reaction Time for Reminder 2	* Reaction Time for Reminder 3	* Reaction Time for Auto Close
High	0 d 02 h 00 m	0 d 02 h 00 m	1 d 00 h 00 m	2 d 00 h 00 m	3 d 00 h 00 m
Low	1 d 00 h 00 m	1 d 00 h 00 m	3 d 00 h 00 m	6 d 00 h 00 m	7 d 00 h 00 m
Medium	0 d 03 h 00 m	1 d 00 h 00 m	2 d 00 h 00 m	4 d 00 h 00 m	5 d 00 h 00 m

7. Now if you navigate to **Send Case Reminder** screen (CR509020), it will list you cases which are pending and qualifies for reminders to be sent. Here user can utilize Schedulers option to schedule this run automatically.

New York **Send Case Reminder**

PROCESS PROCESS ALL

REFRESH ADJUST EXPORT

	<input type="checkbox"/>	Case ID	Subject	Status	Reason	Severity
	<input type="checkbox"/>	000002	Booklet Advertisement Affaire	Pendin...	More I...	Medium