

Using Case Management in Engage

You and your team can conveniently create cases from received messages in your Engage feeds, enabling you to manage and follow your escalations.

Note:

For US clients, this feature is accessible to Pro/Premium accounts only. If you are a US client with a Standard account and would like to upgrade your package, contact your Customer Success Manager (CSM) or Brandwatch Support.

Note:

This article outlines the steps to start using the internal case management feature in Engage. If you are interested in integrating Social Media Management with Salesforce Service Cloud to create Salesforce cases from Engage, please visit our article on the [Salesforce Service Cloud integration](#).

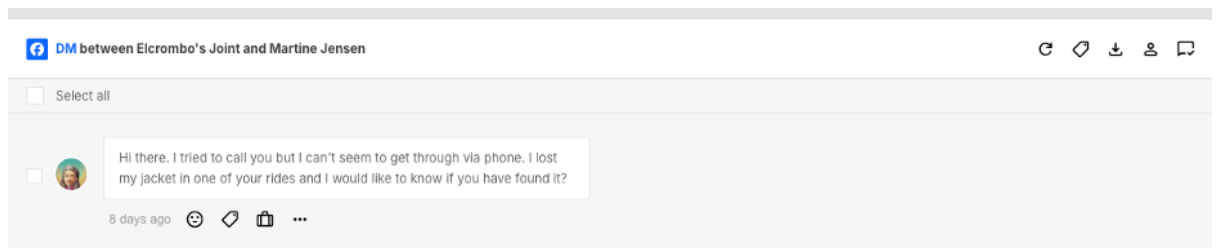
Creating cases from Engage messages

Note:

All user roles except View only users can create cases in Engage.

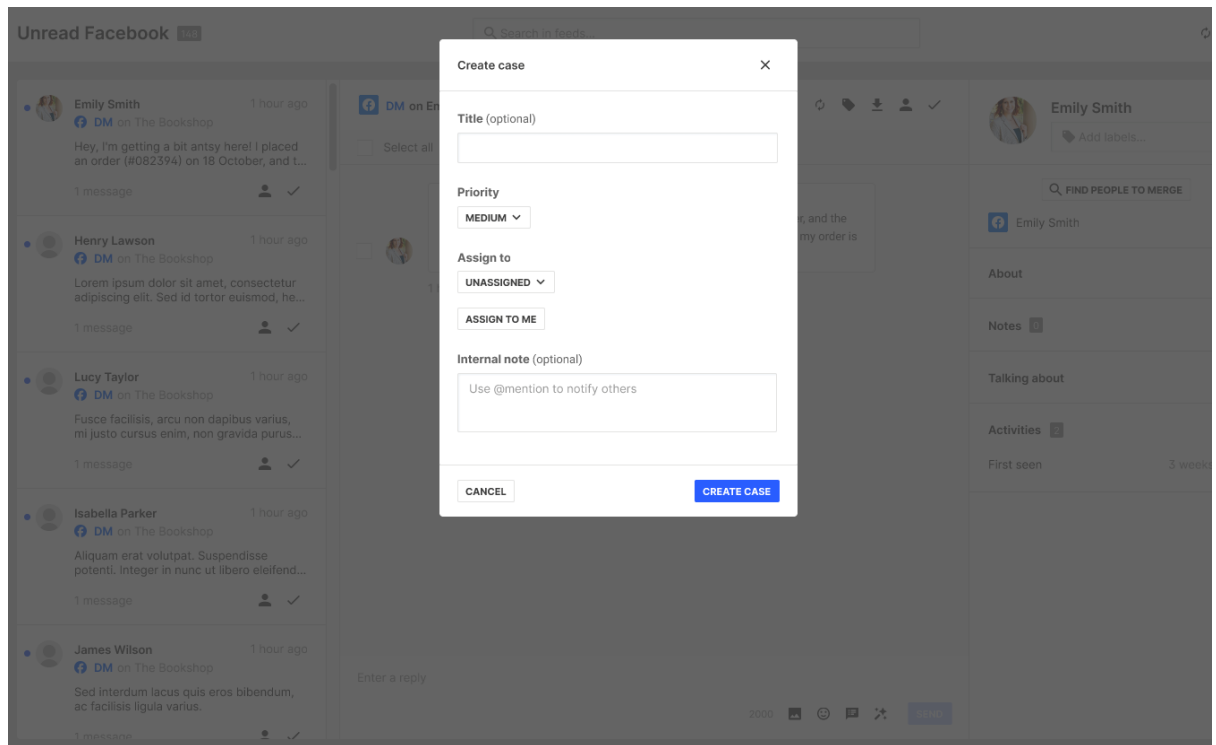
You can easily create a new case from private and public messages in Engage.

1. You can create a case from any received message — like a direct message, comment, mention, or review — in Engage that does not already have an open case. On any received message, click the **Create case (briefcase) icon** to create a new case.

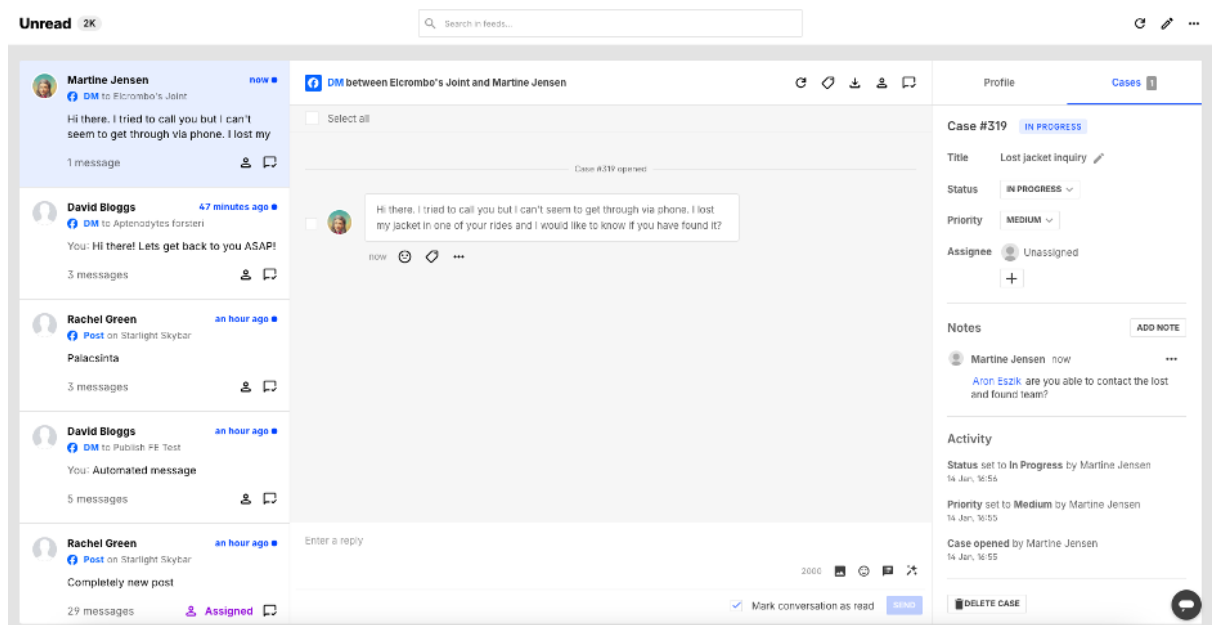


2. In the following menu, you will be able to give the case a title (optional), set a priority, assign it (to one or multiple team members, yourself, or leave it unassigned), and optionally to leave an internal note for your team. After you

have filled out your case details, click **Create case** to confirm.

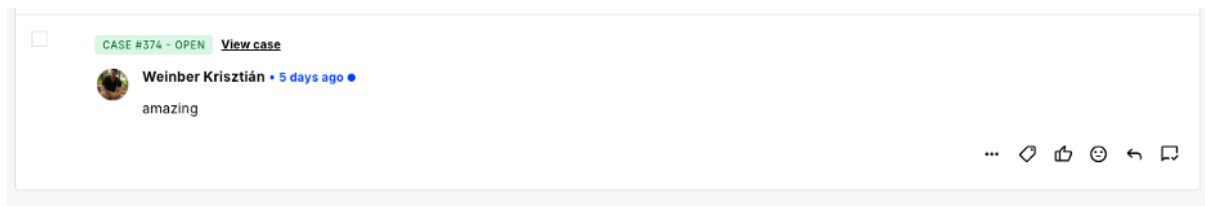


3. Once your case is created, you will see it in a new tab next to the Audience profile card. By default, your case will have the status of “Open” and a case number will be assigned. From this tab, you can also see if you have any prior cases in the conversation. If you have merged the customer’s profile with other profiles, you will be able to see if there are prior or ongoing conversations with the customer on other networks and channels.

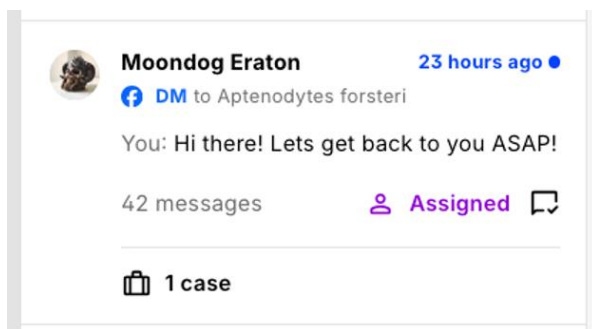


Once you have created a case from a message, your team will no longer see the option to create a case from it to avoid duplicate creation of cases about the same message.

On public messages, you can click **View case** to view the case in the case tab.



If a case has been opened in a conversation, the case (briefcase) icon will display on the conversation in your Feed overview in Engage, with an indication of how many open cases there are. (Please note that a page refresh is needed for the case icon to appear on your and other users' feeds).



Managing open cases in Engage

When viewing an open case in Engage, you can edit the case title, update the status and priority, and continue to add notes about the case.

Once your case is resolved, you can change the status to “Closed.” You can reopen the case again at any time. For direct messages, you can reopen the case again as long as there’s no newer case created on the conversation.

Creating an open cases feed

At any time, you can create a dedicated Engage feed for your open cases to facilitate your team’s management of your cases from Engage. In the Add Feed window, check the **With open case** checkbox to include your cases in the feed. The feed will include all

of your cases with a status of “Open,” “In progress,” “On hold,” and “Pending customer.”

Add feed [X]

Engage feed | Listen feed

Select a preset: ALL UNREAD MY ASSIGNMENTS

OR CREATE A FEED FROM SCRATCH

On network(s): [Facebook] [Twitter] [Instagram] [TikTok] [WhatsApp] [LinkedIn] [YouTube] [Google+]

On channel(s): SELECT CHANNELS

Of type(s): SELECT CONTENT TYPE

Marked as read by: ME ANYBODY NOBODY

Assigned to: ME MY TEAM OTHERS NOBODY

Mentions me in notes: ☐

With open case: ☒ [plus icon]

ADVANCED FILTERS

Title: All

CLEAR SELECTION APPLY SAVE FEED

Includes cases with status:

- Open
- In progress
- On hold
- Pending customer

On public conversations, you can further filter the comments by using the **Detail view** filter to only see comments with open cases.

All | 1 **Unread** | 1 My assignments & mentions With notes

FILTER NEWEST FIRST VIEW OPTIONS

Filter on keywords...

Marked as read by: ME ANYBODY NOBODY AUTOMATION

Assigned to: ME MY TEAM OTHERS NOBODY

Mentions me in notes: ☐

With open case: ☐

Message language: SELECT LANGUAGE

Priority: ☐

Sentiment: POSITIVE NEUTRAL NEGATIVE

With labels: Add labels...

Marked as spam: MANUALLY AUTOMATION NOT SPAM

Hidden on network: SELECT HIDDEN STATUS

CLEAR ALL

8000 [plus icon] [minus icon]

☒ Mark mention as read COMMENT

No more items















All cases overview

In the All cases overview you will find all of the cases you have created in Engage. You can apply filters such as assignee, priority, status, and date, and also change the sorting of the table to show newest/oldest cases first or highest/lowest priority first.

All cases 254/254

Filter by STATUS ▾ PRIORITY ▾ ASSIGNEE ▾

24 JAN 2024 - 23 JAN 2025 NEWEST FIRST ▾

NUMBER	STATUS	PRIORITY	TITLE	CONTACT	MESSAGE	CREATED	ASSIGNEE
424	CLOSED	Medium		 DogPicEnjoy	yes	8 minutes ago	
423	CLOSED	Medium		 DogPicEnjoy	orrrrr noooo 4 more :D	9 minutes ago	
420	IN PROGRESS	High		 DogPicEnjoy	edd	13 minutes ago	
418	PENDING CUSTOMER	Critical		 Rachel Green	5	9 hours ago	
417	OPEN	Medium		 Rachel Green	4	9 hours ago	
416	OPEN	Medium		 Rachel Green	2	9 hours ago	
415	ON HOLD	Low		 Rachel Green	3	a day ago	
413	CLOSED	Medium		 Rachel Green	1	a day ago	
412	OPEN	Medium		 Rachel Green	77	a day ago	
411	CLOSED	Low		 Mac Proba	Hi	a day ago	 
410	OPEN	Medium		 Patrick Olsen	@Thingsforsoul's Testertest	a day ago	

Click on any case to open it and see its associated messages and edit the case details such as status, priority, etc. When opening a case, we recommend refreshing the conversation as this may be required to see the newest messages associated with certain cases.