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.

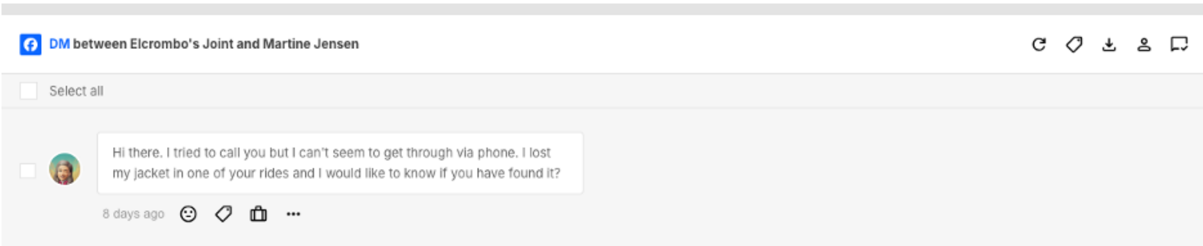
Creating cases from Engage messages

Note:

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

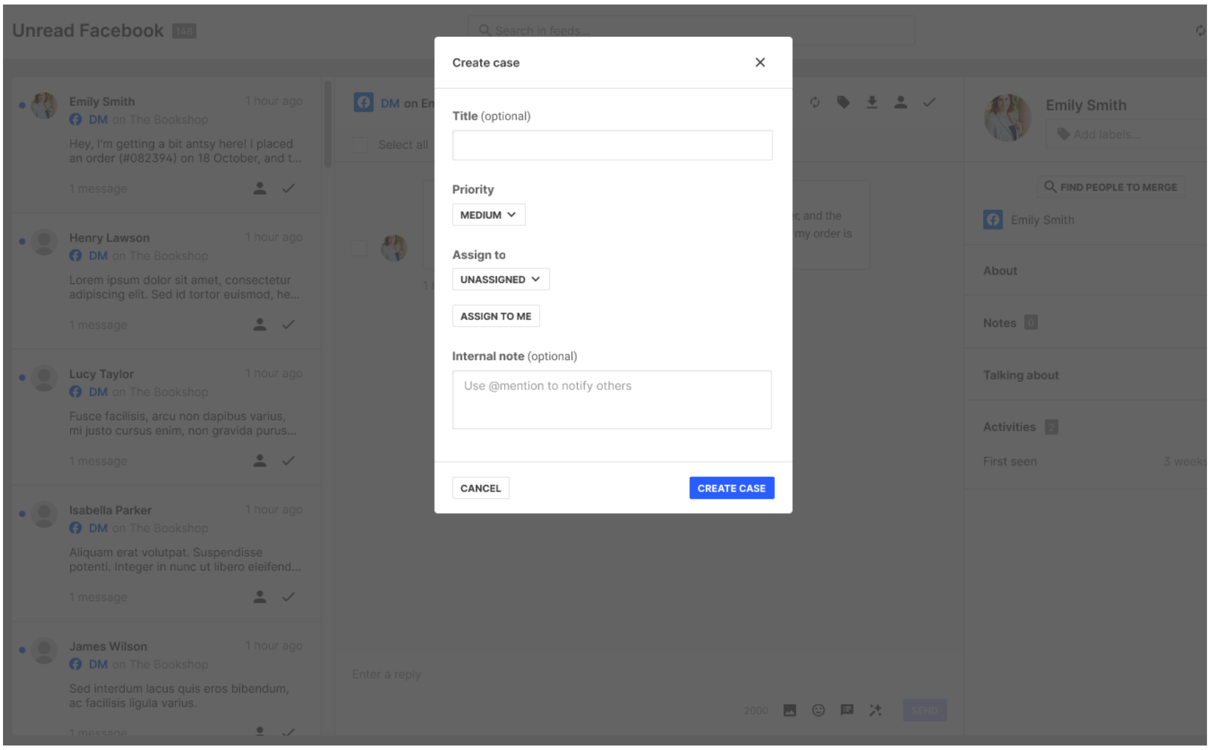
You can easily create a new case from private and public messages in Engage.

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.

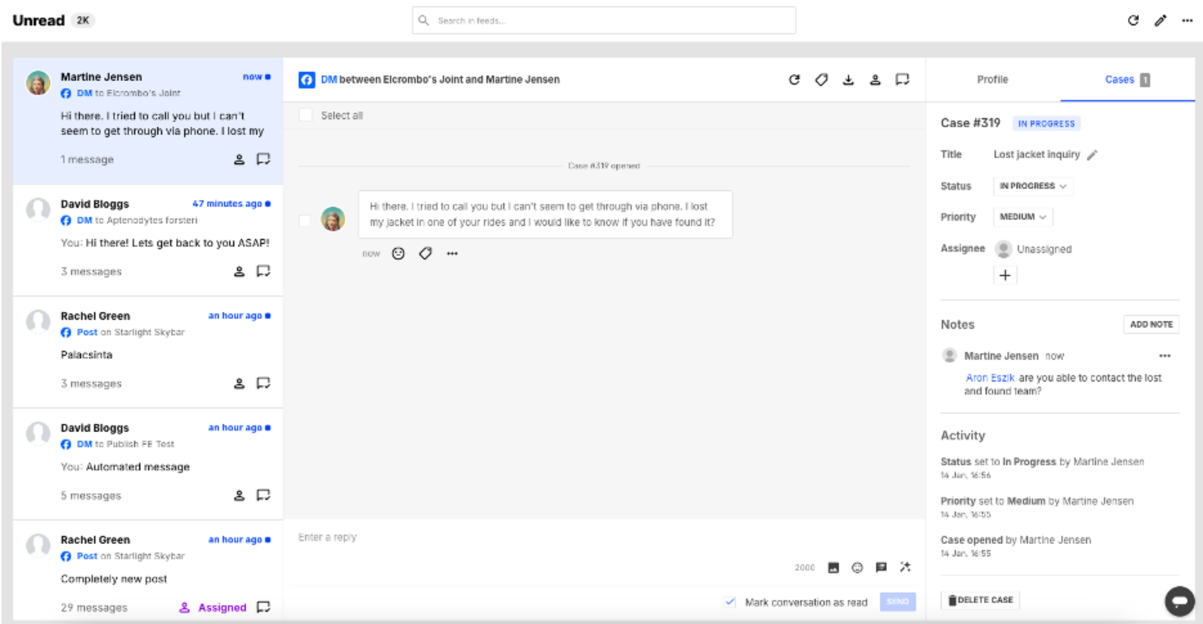
   

2. In the following menu, you will be able to give the case a title (optional), set a priority, assign it (to one or multiple team members, yourself, or leave it unassigned), and optionally to leave an internal note for your team. After you

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

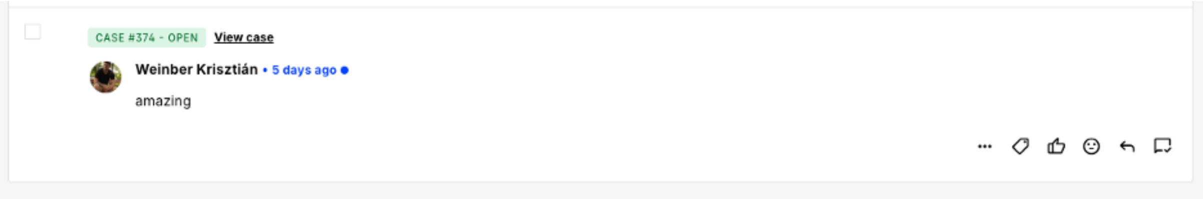


3. Once your case is created, you will see it in a new tab next to the Audience profile card. By default, your case will have the status of "Open" and a case number will be assigned. From this tab, you can also see if you have any prior cases in the conversation. If you have merged the customer's profile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

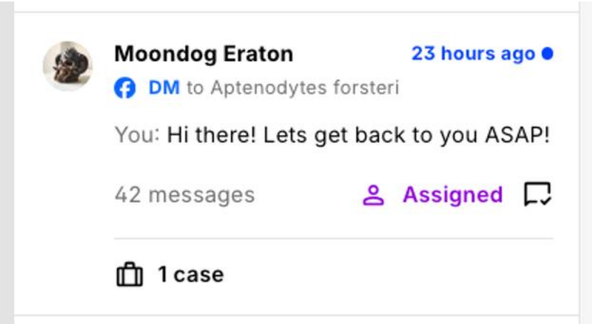


Once you have created a case from a message, your team will no longer see the option to create a case from it to avoid duplicate creation of cases about the same message.

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).



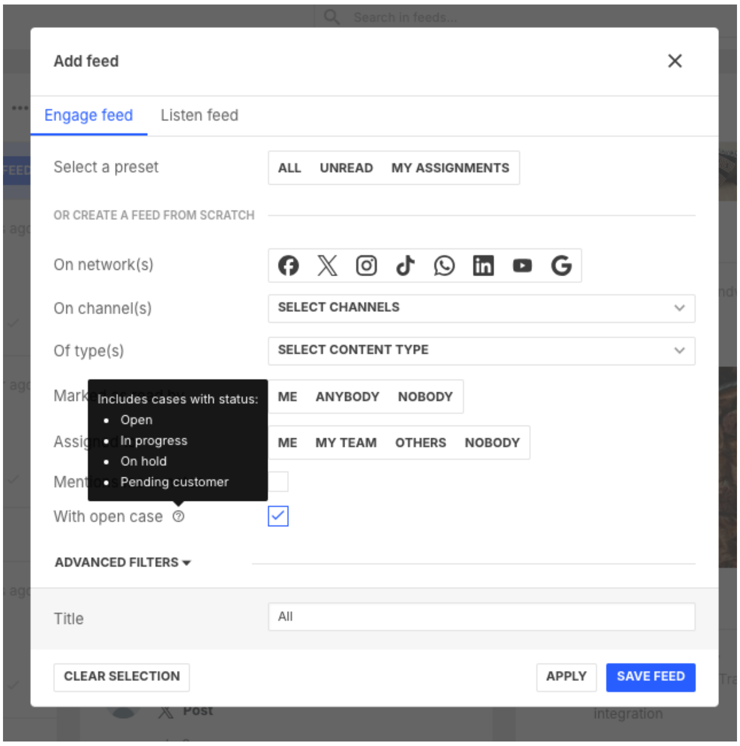
Managing open cases in Engage

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.

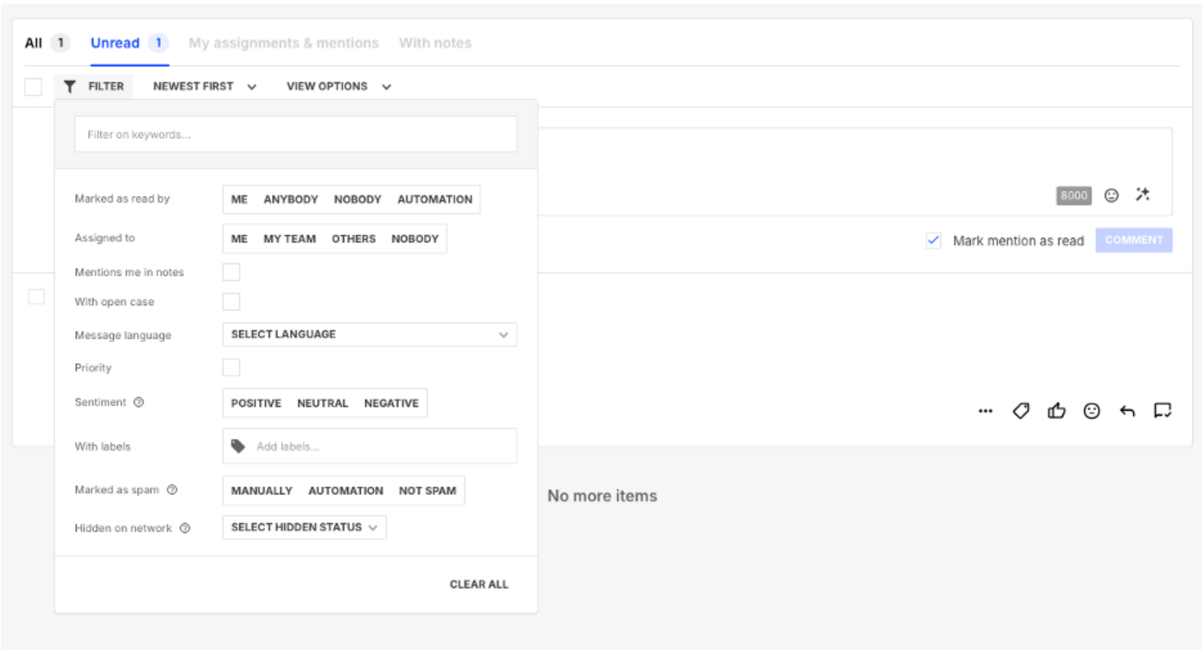
Once your case is resolved, you can change the status to “Closed.” You can reopen the case again at any time. For direct messages, you can reopen the case again as long as there’s no newer case created on the conversation.

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.”

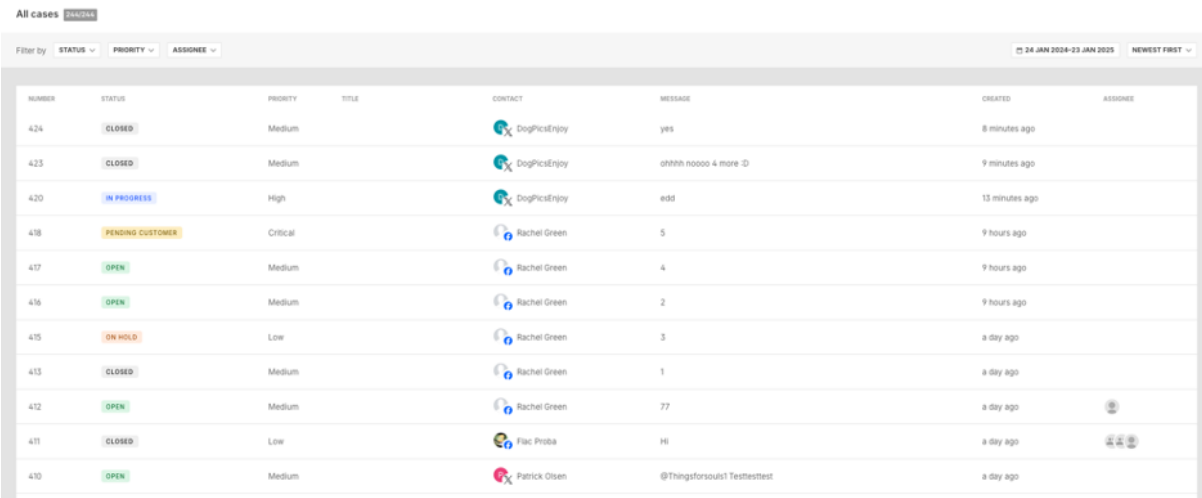


On public conversations, you can further filter the comments by using the **Detail view** filter to only see comments with open cases.



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.



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.