

Case Management App User Guide

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Case Management App

- Overview
- View Cases
- Submitting new cases
- Help
- Hints and tricks

Overview

- Enhanced case data entry
- Improved view of case information and status
- Improved view of cases submitted by co-workers

Viewing and Managing Cases

- Users can see their cases, cases submitted by other users against orders for their company, and their closed cases.

MY CASES ACCOUNT CASES CLOSED CASES							
Case #	Date Opened ↓	Title	Status	Description	Order #	PO #	Invoice #
CAS0709796	Sep 11, 2020	Wrong Item Ordered	Open	Is this a credit only return or do you need to order a charged replacement?: Replacement Are...	SO01220706	1201574PO-PXM	43124282
CAS0709770	Sep 9, 2020	Pricing Credit Request	Open	Apply Quote: Test76661 Selected credit reason: Missing/Wrong Is there anything else we should...	SO01220706	1201574PO-PXM	
CAS0709769	Sep 9, 2020	Pricing Credit Request	Open	Apply Quote: Test765 Selected credit reason: Freight Is there anything else we should know...	SO01220706	1201574PO-PXM	
CAS0709768	Sep 9, 2020	Shortage/Missing Product	Open	Are you missing a component or the entire device?: Device Is there anything else we should know...	SO01220706	1201574PO-PXM	43124282
CAS0709767	Sep 9, 2020	Damaged Product	Open	Is there visible damage to exterior of shipping cartons?: Yes Carrier: UPS Tracking #: !34556667777 Is...	SO01220706	1201574PO-PXM	43124282

Viewing and Managing Cases

- Users can search for cases by case #, case title, order #, and PO #.
- All orange text is a hot link to additional information.

MY CASES ACCOUNT CASES CLOSED CASES							
Case #	Date Opened ↓	Title	Status	Description	Order #	PO #	Invoice #
CAS0709796	Sep 11, 2020	Wrong Item Ordered	Open	Is this a credit only return or do you need to order a charged replacement?: Replacement Are...	SO01220706	1201574PO-PXM	43124282
CAS0709770	Sep 9, 2020	Pricing Credit Request	Open	Apply Quote: Test76661 Selected credit reason: Missing/Wrong Is there anything else we should...	SO01220706	1201574PO-PXM	
CAS0709769	Sep 9, 2020	Pricing Credit Request	Open	Apply Quote: Test765 Selected credit reason: Freight Is there anything else we should know...	SO01220706	1201574PO-PXM	
CAS0709768	Sep 9, 2020	Shortage/Missing Product	Open	Are you missing a component or the entire device?: Device Is there anything else we should know...	SO01220706	1201574PO-PXM	43124282
CAS0709767	Sep 9, 2020	Damaged Product	Open	Is there visible damage to exterior of shipping cartons?: Yes Carrier: UPS Tracking #: !34556667777 Is...	SO01220706	1201574PO-PXM	43124282

Viewing and Managing Cases

- If customers click on the Case #, they will see this view which shows them details about the case.

[< MY CASES](#) < CASE DETAILS

Case Details

Case # CAS0709768	Date Opened 9/9/20	Title Shortage / Missing Product	Status Open	PO # 1201574PO-PXM	Order # S001220706	Invoice # 43124282
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Case Description

Are you missing a component or the entire device?: Device

Is there anything else we should know about your request?: Test5678

Email:

Preferred Contact Method: Email

Additional Line Information

Disposition Type	Line #	Part #	Product	Quantity
	1	HINGE.323	5BB1 4.5X4.5 652/26D	7

Items per page: 10 1 - 1 of 1 < >

Submitting a New Case

- The form will walk you thru the information needed for each case.
- Some fields are “Required” and noted as such with red text.
- Once the case is filled out, click submit.
- A pop-up message with the case # will appear.
- The new case should be visible in the open case list immediately.

The screenshot shows a web form titled "New Case" with a breadcrumb trail "< MY CASES < NEW CASE". The form contains several sections:

- Please select your request type:** A dropdown menu with "Change" selected.
- Please select your specific request:** A dropdown menu with "Change Ship Method/Address" selected.
- Please search for your Allegion Sales Order #, Purchase Order # or Invoice #:** A text input field containing "1212".
- Please provide requested shipping changes and anything else we should know about this request:** A text area containing "Change Ship Method to UPS NDA".
- Preferred method of contact?:** Radio buttons for "Email" (selected) and "Phone".
- Contact email address:** A text input field containing "laforceind@mailinator.com".
- Contact phone number:** A text input field with the placeholder "Phone Number".

At the bottom right, there are two buttons: "CANCEL" and "SUBMIT".

Submitting a New Case

- For certain types of cases, you will see a drop down appear with line descriptions and quantities.
- You can check each line (or select all) and identify the quantity affected.

Please select your request type

Return/Replace

Please select your specific request

Wrong Item Ordered

Please search for your Allegion Sales Order #, Purchase Order # or Invoice #

SO01288428

Please select line(s)

☒	Line #	Order #	Description	Original Quantity	Return Quantity
☒	1	SO01288428	JB7 INTERF. BOX 24VDC X DPDT R	0	5

Items per page: 5 1 - 1 of 1 < >

Is this a credit only return or do you need to order a charged replacement?

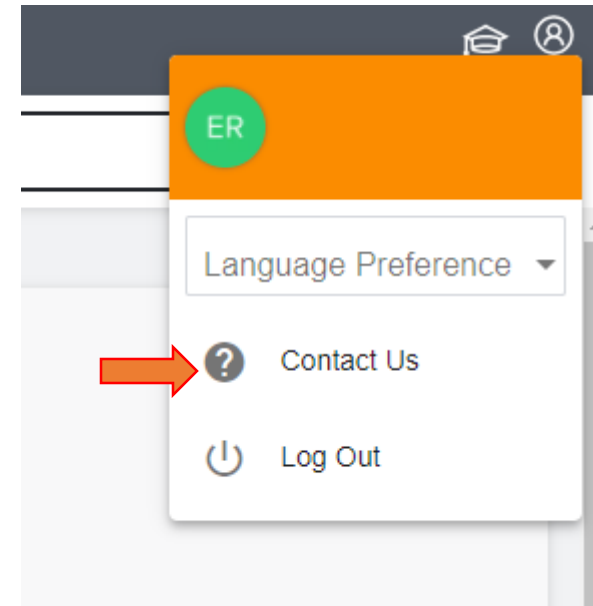
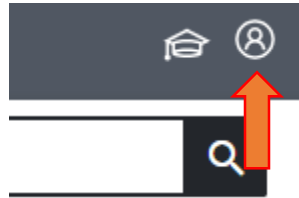
Credit

Please confirm that you agree to a 45% restocking fee

Yes; I agree that I will be charged a 45% restocking fee

Help

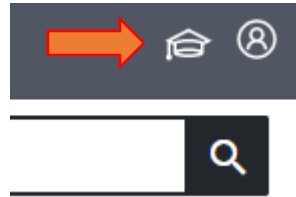
- Users can still contact us by clicking the User icon, and then selecting “Contact Us”.



- Users will be able to fill out and submit a request form.

Hints and Tricks

- There is an icon that will take users directly to our website where you can access the document library, lead times, and additional information about the portal.



- If you get a blank login screen, try CNTL + F5 for a hard refresh.