

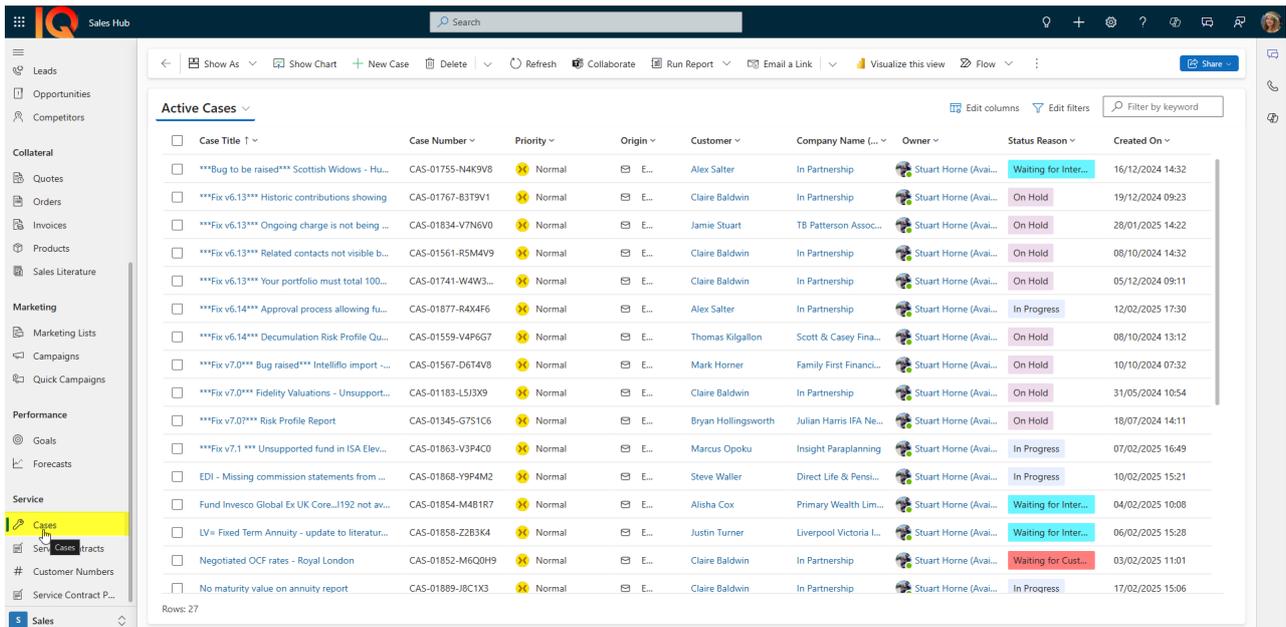
# How to create a case view

20/02/2025 12:24 pm GMT

Cases are used by multiple businesses within FintellIQ.

Before using the Case area, you will need to configure your views to make sure you can track and view your own teams cases.

Start by navigating to Cases in the left menu:



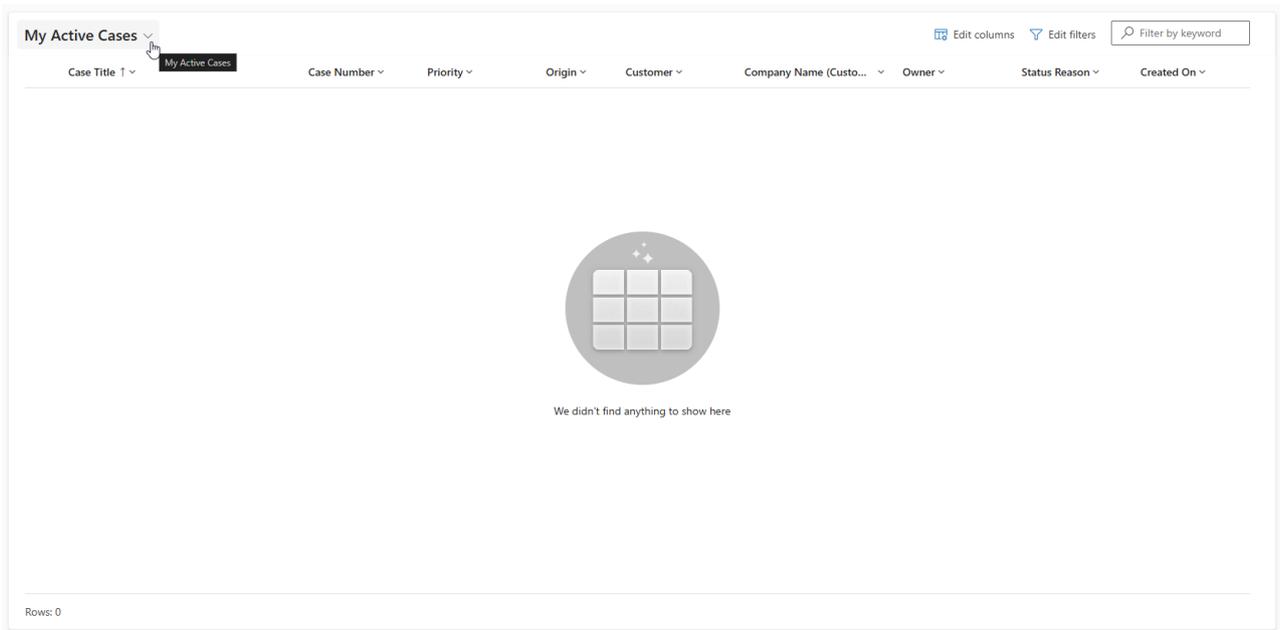
The screenshot displays the 'Active Cases' view in the FintellIQ Sales Hub. The interface includes a search bar at the top, a navigation menu on the left, and a table of cases. The table has the following columns: Case Title, Case Number, Priority, Origin, Customer, Company Name, Owner, Status Reason, and Created On. The cases listed include various issues such as 'Bug to be raised', 'Historic contributions showing', 'Ongoing charge not being', 'Related contacts not visible', 'Your portfolio must total 100%', 'Approval process allowing fu...', 'Decumulation Risk Profile Qu...', 'Bug raised', 'Fidelity Valuations - Unsupport...', 'Risk Profile Report', 'Unsupported fund in ISA Elev...', 'Missing commission statements from', 'Fund Invesco Global Ex UK Core', 'Fixed Term Annuity - update to literatur...', 'Negotiated OCF rates - Royal London', and 'No maturity value on annuity report'.

Case Title	Case Number	Priority	Origin	Customer	Company Name	Owner	Status Reason	Created On
***Bug to be raised*** Scottish Widows - Hu...	CAS-01755-N4K9V8	Normal	E...	Alex Salter	In Partnership	Stuart Horne (Avai...	Waiting for Inter...	16/12/2024 14:32
***Fix v6.13*** Historic contributions showing	CAS-01767-B3T9V1	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	On Hold	19/12/2024 09:23
***Fix v6.13*** Ongoing charge is not being ...	CAS-01834-V7N6V0	Normal	E...	Jamie Stuart	TB Patterson Assoc...	Stuart Horne (Avai...	On Hold	28/01/2025 14:22
***Fix v6.13*** Related contacts not visible b...	CAS-01561-R5M4V9	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	On Hold	08/10/2024 14:32
***Fix v6.13*** Your portfolio must total 100...	CAS-01741-W4W3...	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	On Hold	05/12/2024 09:11
***Fix v6.14*** Approval process allowing fu...	CAS-01877-R4X4F6	Normal	E...	Alex Salter	In Partnership	Stuart Horne (Avai...	In Progress	12/02/2025 17:30
***Fix v6.14*** Decumulation Risk Profile Qu...	CAS-01559-V4P6G7	Normal	E...	Thomas Kilgallon	Scott & Casey Fina...	Stuart Horne (Avai...	On Hold	08/10/2024 13:12
***Fix v7.0*** Bug raised*** Intelliflo import ...	CAS-01567-D6T4V8	Normal	E...	Mark Horner	Family First Financi...	Stuart Horne (Avai...	On Hold	10/10/2024 07:32
***Fix v7.0*** Fidelity Valuations - Unsupport...	CAS-01183-LSJ3X9	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	On Hold	31/05/2024 10:54
***Fix v7.02*** Risk Profile Report	CAS-01345-G7S1C6	Normal	E...	Bryan Hollingsworth	Julian Harris IFA Ne...	Stuart Horne (Avai...	On Hold	18/07/2024 14:11
***Fix v7.1 *** Unsupported fund in ISA Elev...	CAS-01863-V3P4C0	Normal	E...	Marcus Opoku	Insight Paraplanning	Stuart Horne (Avai...	In Progress	07/02/2025 16:49
EDI - Missing commission statements from ...	CAS-01868-Y9P4M2	Normal	E...	Steve Waller	Direct Life & Pensi...	Stuart Horne (Avai...	In Progress	10/02/2025 15:21
Fund Invesco Global Ex UK Core...192 not av...	CAS-01854-M4B1R7	Normal	E...	Alisha Cox	Primary Wealth Lim...	Stuart Horne (Avai...	Waiting for Inter...	04/02/2025 10:08
LV= Fixed Term Annuity - update to literatur...	CAS-01858-Z2B3K4	Normal	E...	Justin Turner	Liverpool Victoria L...	Stuart Horne (Avai...	Waiting for Inter...	06/02/2025 15:28
Negotiated OCF rates - Royal London	CAS-01852-M6Q0H9	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	Waiting for Cust...	03/02/2025 11:01
No maturity value on annuity report	CAS-01889-JBC1X3	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	In Progress	17/02/2025 15:06

View usually defaults to **My Active Cases**. This is not the best view to use if you are part of a team with multiple people logging cases, as this view only contains cases you (the current user) has created.

We will need to select a view of **All Cases** and use filters to narrow down the case list.

Click into the view dropdown:



Select **All Cases**. This will return all cases within Dynamics 365 including Active and Resolved cases.

We will start by selecting **Edit Filters**:

Search views

- Active Cases
- Resolved On Hold Cases
- SYN - Active Cases - ALL (except On Hold) Default
- SYN - On Hold Active Cases
- Active Cases
- Active Cases from IoT Alert
- Active Cases Opened in the Last 7 days
- Active Cases with Parent Child Status
- All Cases**
- All Cases from IoT Alerts
- Case introduction message view
- Cases Being Followed
- Cases for Recent Records
- Cases I Follow
- Cases Opened in the Last 7 days
- Cases Resolved By Me in the last 7 days
- Cases Resolved in the last 7 days
- Enhanced Active Cases
- My Active Cases

All Cases Filter by keyword

Case Title	Case Number	Priority	Origin	Customer	Company Name (Custo...	Owner	Status Reason	Created On
***79284*** We have identified that the po...	CAS-01074-H3P3L4	Normal	E...	Sandy McLaren	Scottish Widows Limited	Stuart Horne (Ava...	Problem Solved	19/04/2024 15:12
***August update*** GQIZ -BNY Mellon M...	CAS-01317-R4L1W8	Normal	P...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	09/07/2024 12:51
***August update*** No platforms returne...	CAS-01334-K0K7Y9	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	16/07/2024 08:27
***Bug - 18th Nov***Comparison PDF doe...	CAS-01627-P5L2Y2	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	28/10/2024 09:37
***Bug 80628*** KFI document in UAT not ...	CAS-01688-Z388...	Normal	E...	John Griffin	Legal and General Assura...	Stuart Horne (Ava...	Problem Solved	14/11/2024 11:32
***Bug raised 79738*** Allied Lupton - Val...	CAS-01184-H6J4M6	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	31/05/2024 10:57
***Bug raised 79809*** Incorrect boundari...	CAS-01261-Z8P8N0	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	21/06/2024 09:34
***Bug to be raised*** Scottish Widows - ...	CAS-01755-N4K9V8	Normal	E...	Alex Salter	In Partnership	Stuart Horne (Ava...	Waiting for Inte...	16/12/2024 14:32
***Fix v6.10*** Client reported error gener...	CAS-01320-T9N8T1	Normal	E...	Graham Gingell	Veritas	Stuart Horne (Ava...	Problem Solved	10/07/2024 15:13
***Fix v6.10*** Ex-ante - Rebate figure sho...	CAS-01248-Z2Q6R5	Normal	E...	Alex Salter	In Partnership	Stuart Horne (Ava...	Problem Solved	19/06/2024 10:01
***Fix v6.10*** Risk Rating increases when ...	CAS-01348-N9K9V4	Normal	E...	Alex Salter	In Partnership	Stuart Horne (Ava...	Problem Solved	19/07/2024 12:00
***Fix v6.10***Error message when downlo...	CAS-01359-R6R3S9	Normal	E...	Dawn Dearlove	Beckett Financial Services ...	Stuart Horne (Ava...	Problem Solved	25/07/2024 14:57
***Fix v6.11*** Add ceding scheme charge ...	CAS-01511-X4V2R4	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	19/09/2024 10:54
***Fix v6.11*** Fund costs not pulling thro...	CAS-01450-COR0P1	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	29/08/2024 08:31
***Fix v6.11*** Off-platform disappeared fr...	CAS-01527-T7R4L7	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	25/09/2024 10:41
***Fix v6.12*** Brewin Dolphin charge sho...	CAS-01672-K6G1L7	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Ava...	Problem Solved	07/11/2024 15:11

Rows: 884

The first filter will ensure only Active cases will pull through.

Click **Add**> **Add row**

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**Edit filters: Cases** ×

[Reset to default](#) [Delete all filters](#)

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Showing live data [Change to retained data](#) ⓘ

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AND ▾	Field	Operator	Value
		<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"><p>+ Add ▾</p><p>⊕ Add row <span style="margin-left: 20px;">☞</span></p><p>≡ Add group</p><p>🔗 Add related entity</p></div>	

Under field, select **Status**

**Edit filters: Cases**

[Reset to default](#) [Delete all filters](#)

Showing live data [Change to retained data](#)

AND  Field

Select a field

- Origin
- Owner
- Owning Business Unit
- Parent Case
- Pre Create Entity Attachments Id
- Pre Create Notes Id
- Priority
- Product
- Received As
- Record Created On
- Resolve By
- Resolve By KPI
- Resolve By SLA Status
- Responsible Contact (Deprecated)
- Satisfaction
- Sentiment Value
- Serial Number
- Service Contract
- Service Level
- Service Stage
- Severity
- SLA
- Social Profile
- Status**
- Status Reason
- Subject

**Apply** **Cancel**

The operator field defaults to **Equals** and select **Active**:

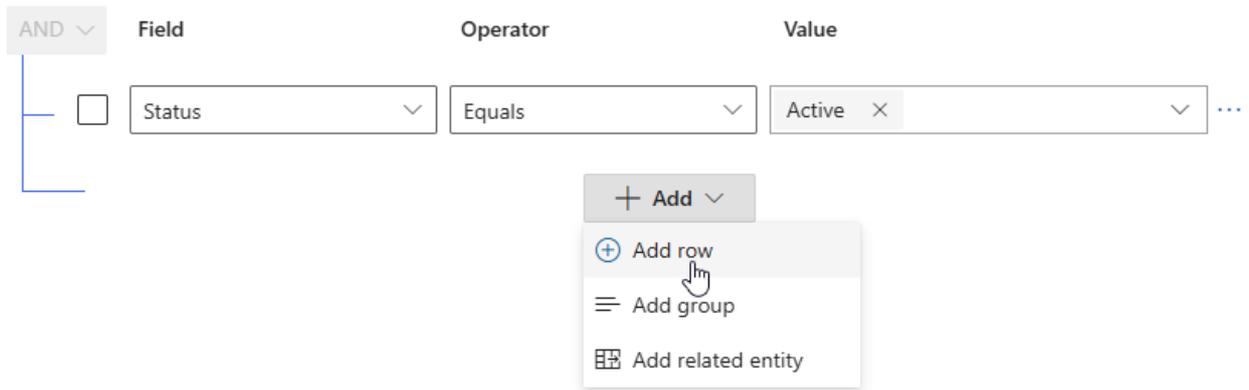
AND  Field Operator Value

Status Equals Value

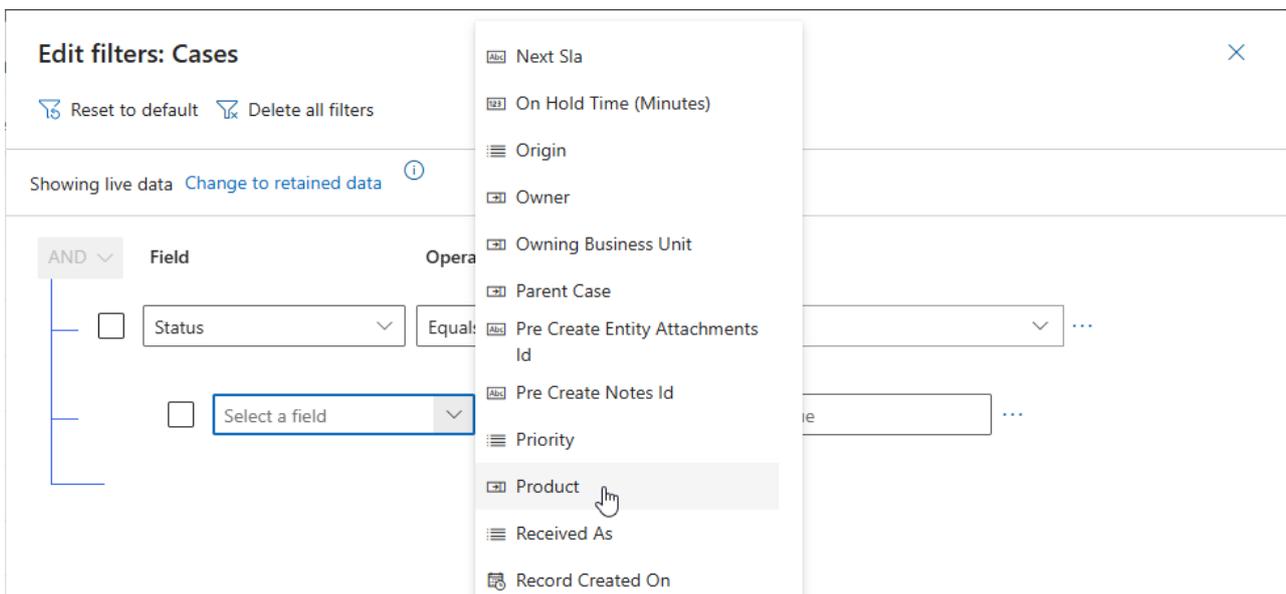
+ Add

- Active**
- Resolved
- Cancelled

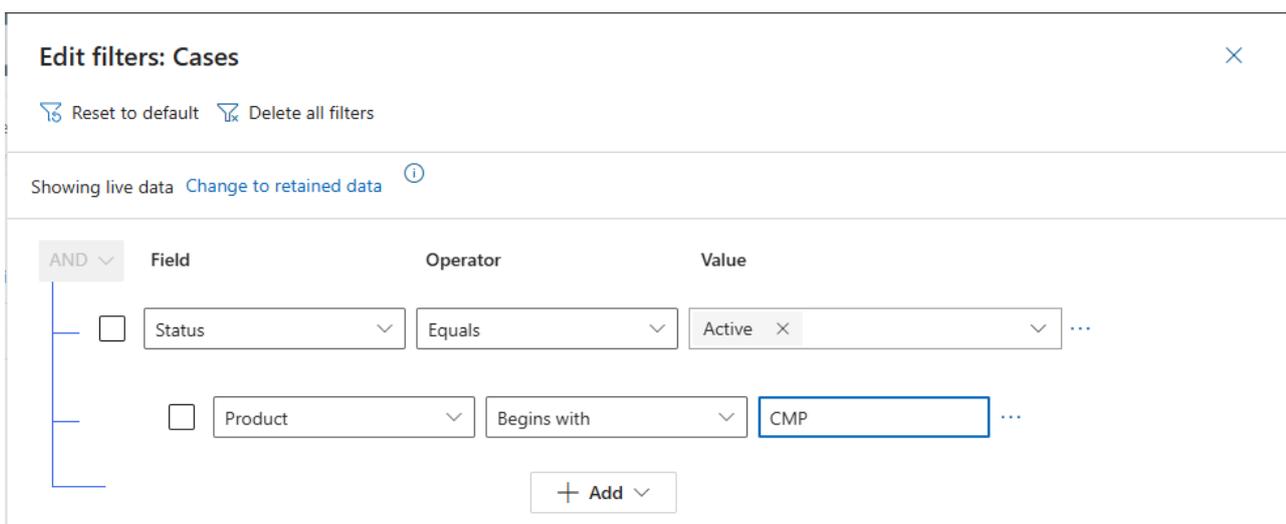
Add another row to narrow down the Active cases to only your business unit.



Under field, select Product:



Select **Begins with** in the operator field and type your business unit prefix. For e.g. **CMP**



Apply:

	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Active
<input type="checkbox"/>	Product	Begins with	CMP
<input type="button" value="+ Add"/>			

This will return all cases that are Active and with a product beginning with your business unit prefix.

**Note - You must complete the Product field within the case for the case to appear in the view:**

← | ↻ | Save | Save & Close | Save & Route | + New | Flow ▾

**New Case** - Unsaved  
Case · Case ▾

**Phone to Case Process**  
Active for less than one minute

Identify (< 1 Min)

Summary | Case Relationships | Associated Knowledge Records | Enhanced SLA

**CASE DETAILS**

Case Title \* Test Case

ID Products

Subject **CMP - Annual Testing Facility** ▾  
CMP - Annual Testing Facility

Customer \* **CMP - Bespoke E-learning Package** ▾  
CMP - Bespoke E-learning Package

Service Contract **CMP - Consultancy** ▾  
CMP - Consultancy

Origin **CMP - My CPD Site (Up to 10 Users)** ▾  
CMP - My CPD Site (Up to 10 Users)

Contact **CMP - Own Branded Site** ▾  
CMP - Own Branded Site

[Advanced lookup](#)

**Product** CMP

Fixed in release? Add version ---

We will now save our changes.

Click into the view dropdown, select **Save as new view**:

The screenshot shows a software interface with a view selection dropdown menu. The menu is open, displaying a list of views. The 'Save as new view' option is highlighted in yellow, and a mouse cursor is pointing at it. The background shows a table with columns 'Case Title' and 'test case CMP'.

Search views

- Active Cases
- Active Cases - ALL CASES (except On Hold)
- Active Cases - ON HOLD
- ✓ CMP test case - All Cases\*
- Test View
- Waiting on Release
- Active Cases Default
- Active Cases from IoT Alert
- Active Cases Opened in the Last 7 days
- Active Cases with Parent Child Status
- All Cases
- All Cases from IoT Alerts
- Case introduction message view
- Cases Being Followed
- Cases for Recent Records
- Cases I Follow
- Cases Opened in the Last 7 days
- Cases Resolved By Me in the last 7 days
- Cases Resolved in the last 7 days

Save changes to current view

Save as new view

Reset default view

Manage and share views

Rows: 1

Give the view a name and **Save**:

### Save as new view ✕

The view is stored in the list of saved views

Name \*

Description

**CMP - All Cases** ⌵ Edit columns Edit filters

<input type="checkbox"/> Case Title <span>↑</span> <span>⌵</span>	Case Number <span>⌵</span>	Priority <span>⌵</span>	Origin <span>⌵</span>	Customer <span>⌵</span>	Company Name (Custo... <span>⌵</span>	Owner <span>⌵</span>	Status Reason <span>⌵</span>	Created On <span>⌵</span>
<input type="checkbox"/> test case CMP	CAS-01208-D2X9B3	<span>⚠</span> Normal	<span>✉</span> E...	AP Limited		<span>AP</span> Amy Paulsen	In Progress	20/02/2025 11:50