# How to create resolved cases view and export

25/02/2025 10:37 am GMT

### Navigate to **Cases** in the left menu:

III 📿 Sales Hub		✓ Search						۹ + ۵	© ? © Ģ	ନ
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Opportunities	Active Cases ~						🖽 Edit colu	mns 🛛 🏹 Edit filters	P Filter by keyword	
ollateral	□ Case Title ↑ ~	Case Number ~	Priority ~	Origin ~	Customer ~	Company Name ( ~	Owner ~	Status Reason ~	Created On ~	
Quotes	***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	
Orders	***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	
§ Invoices	***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	
Products	***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	
Sales Literature	***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	
arketing	***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	
Marketing Lists	***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	
Campaigns	***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	
Quick Campaigns	***Fix v7.0*** Fidelity Valuations - Unsupport	CAS-01183-L5J3X9	😣 Normal	🖻 E	Claire Baldwin	In Partnership	😤 Stuart Horne (Avai	On Hold	31/05/2024 10:54	
rformance	***Fix v7.0?*** Risk Profile Report	CAS-01345-G7S1C6	😣 Normal	🖻 E	Bryan Hollingsworth	Julian Harris IFA Ne	😤 Stuart Horne (Avai	On Hold	18/07/2024 14:11	
Goals	***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	
Forecasts	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	
rvice	Fund Invesco Global Ex UK Core192 not av	CAS-01854-M4B1R7	😣 Normal	🖻 E	Alisha Cox	Primary Wealth Lim	😪 Stuart Horne (Avai	Waiting for Inter	04/02/2025 10:08	
Cases	LV= Fixed Term Annuity - update to literatur	CAS-01858-Z2B3K4	😣 Normal	🖻 E	Justin Turner	Liverpool Victoria I	😪 Stuart Horne (Avai	Waiting for Inter	06/02/2025 15:28	
Serv Cases tracts	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	
Service Contract P	No maturity value on annuity report	CAS-01889-J8C1X3	😠 Normal	🖻 E	Claire Baldwin	In Partnership	🙊 Stuart Horne (Avai	In Progress	17/02/2025 15:06	
Sales	Rows: 27									

The view will be set to My Active Cases by default (unless changed).

Go into the view dropdown and scroll down to **Resolved Cases**. This view will include all resolved cases in Dynamics 365. You will need to add filters to narrow down the list.



## Once within the Resolved Cases view, go to Edit Filters:

Resolved Cases $\vee$						🔃 Edit colun	mns <b>V Edit filters</b>	
□ Case Title ↑ ~	Case Number ~	Priority ~	Origin ~	Customer ~	Company Name (Custo \vee	Owner ~	Status Reason ~	Created On ~

Click Add > Add row

# Edit filters: Cases

∑ Reset to a	default 🛛 🔀 Delete all filters						
Showing live d	data Change to retained data	D					
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# Under field, select Product:

Edit filters: Cases	🗟 Modified On		×
	And Next Sla		
16 Reset to default $16$ Delete all filters	183 On Hold Time (Minutes)		
Showing live data Change to retained data	≡ Origin		
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AND V Field Operate	Owning Business Unit		
Status Equals	I Parent Case	· ···	
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Select a field V	🔤 Pre Create Notes Id	е ···	
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In the Operator field, select **Begins with** 

AND $\vee$	Field	Operator	Value
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	Status ~	Equals       ✓         Equals       Equals         Does not equal       Contains data         Does not contain data       Contains         Does not contain       Begins with Im         Does not begin with       Ends with         Does not end with       Does not end with	Value V ····
		Under Not Under	

Type your business unit prefix, for e.g. CMP

Edit filters: Cases			
S Reset to default S Delete all	filters		
Showing live data Change to retaine	d data (i)		
AND V Field	Operator	Value	
Status	✓ Equals ✓	Resolved ×	~ …
		k3	
Product	✓ Begins with	~   CMP	
	$+$ Add $\sim$		

Add a date range using the field 'Deactivated On'.

Click Add> add row

# Edit filters: Cases

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Showing live data Change to retained data	
AND V Field Operat	tor Value
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Within Field, select <b>Deactivated On</b>	+ Add ∨ ⊕ Add row = Add group ⊞ Add related entity
Edit filters: Cases	<ul> <li>Contract Line</li> </ul>
$\overline{15}$ Reset to default $\overline{15}$ Delete all filters	i≡ Copilot Engaged
Showing live data Change to retained data	<ul> <li>□ Created By</li> <li>□ Created By (Delegate)</li> </ul>
AND V Field Opera	at 🖽 Created By (External Party)
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	Customer
	B Deactivated On
Select a field	E Decrement Entitlement Terms
	E Decrementing

In the **Operator** field, you are able to set a date range. For e.g. Any cases 'Deactivated' (resolved) in the last month, last weeks, last days etc.



Select date range & Apply

## **Edit filters: Cases**

S Reset to default S Delete all filters

Showing live data Change to retained data (i)

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This will return all cases that are Resolved and with a product beginning with your business unit prefix, in the date range you've selected.

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

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CASE DETAILS		Summary
Case Title *	Test Case	
ID 👌	Products	ine
Subject	<ul> <li>CMP - Annual Testing Facility</li> <li>CMP - Annual Testing Facility</li> </ul>	~
Customer *	CMP - Bespoke E-learning Package CMP - Bespoke E-learning Package	~
Service Contract	CMP - Consultancy CMP - Consultancy	$\sim$
Origin	<ul> <li>CMP - My CPD Site (Up to 10 Users)</li> <li>CMP - My CPD Site (Up to 10 Users)</li> </ul>	$\sim$
Contact	CMP - Own Branded Site	$\sim$
Contact	<u>Advanced</u>	lookup
Product	CMP 🔎	
Fixed in release? Add version		

We will now save our changes. Click into the view dropdown, select **Save as new view:** 

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	✓ Search views	
← 💾 Show As ∨ 🛙	Active Cases	🗊 Collaborat
	CMP Resolved Cases	
Resolved Cases* ~	Resolved On Hold Cases 💄	
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Synaptic Pathways	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	
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	🕼 Save as new view	
	S Reset default view ∑ Reset default view	
Rows: 1	Manage and share views	

Type a name for your new view and Save

Save as new view	×
The view is stored in the list	of saved views
Name	CMP Resolved Cases
Description	
	Save In Cancel Save

Your new view can now be found in the view dropdown:

	Search	
	✓ Search views	
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	CMP Resolved Cases     ش     ش     ش     ن	
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Case Title ↑ ~	SYN - Active Cases - ALL (except On Hold) 💄 Default	Oriç
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When you need to export the resolved cases, go to the three dots on the top right and **Export to Excel**.

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CMP Resolved Cases ~						😨 Edit column	Excel Templates	> _[m] >	S. B
□ Case Title ↑ ~	Case Number ~	Priority ~	Origin ~	Customer ~	Company Name (Custo	V Owner V Exp	ort to Excel ort the data to a static or dyna	mic Excel worksheet or to an Excel F	PivotTable.
Synaptic Pathways - Error	CAS-01897-B3Y7T5	1 High	🖾 E	Dummy Client Ltd		R Amy Paulsen (Ava			

Note - You can create multiple resolved case views for different date ranges. Start by selecting one of your created resolved case views, tweak the 'Deactivated On' date range and save as new view.