

How to create resolved cases view and export

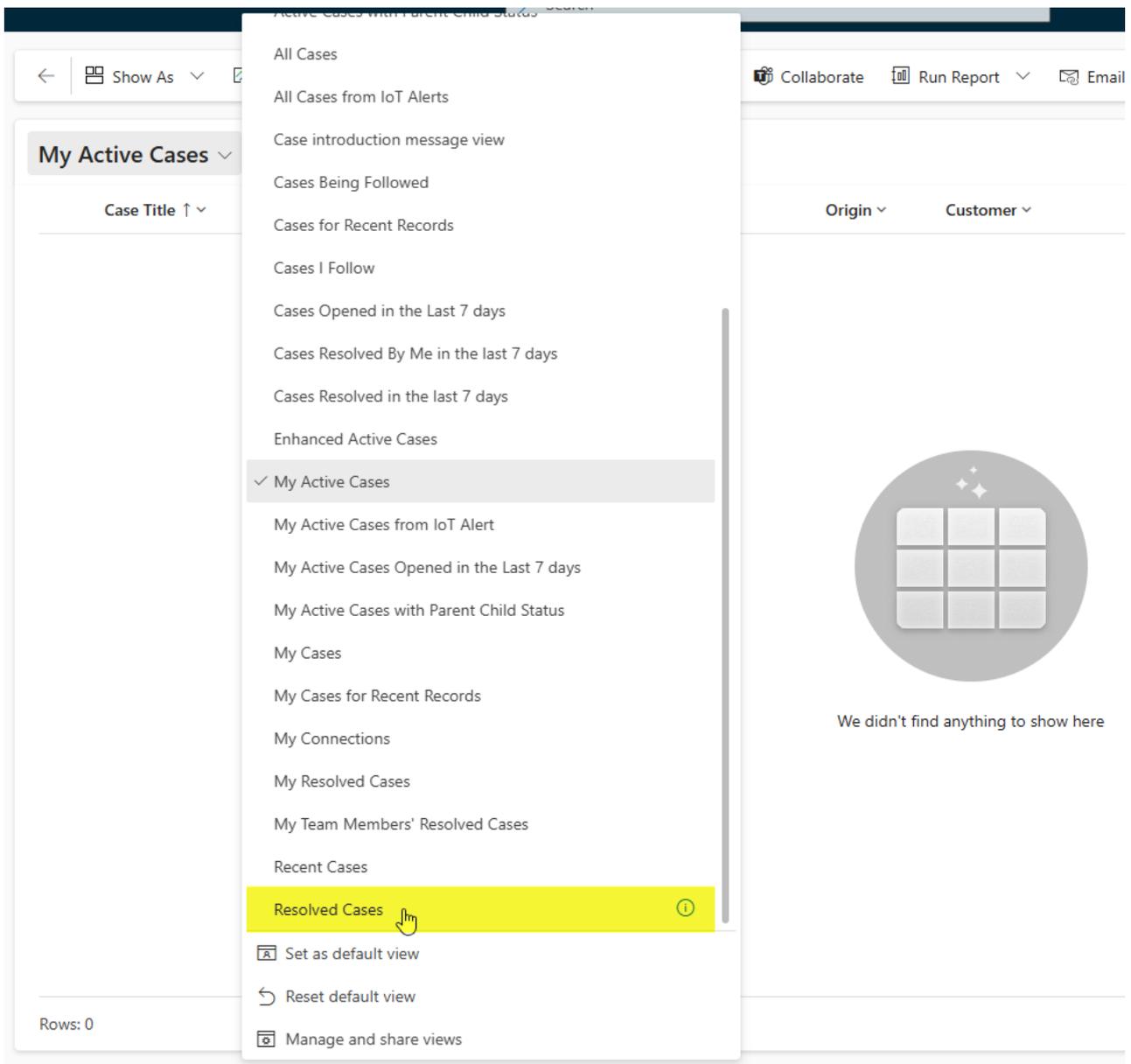
25/02/2025 10:37 am GMT

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

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-J8C1X3	Normal	E...	Claire Baldwin	In Partnership	Stuart Horne (Avai...	In Progress	17/02/2025 15:06

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**:



Click **Add > Add row**

Edit filters: Cases



Reset to default Delete all filters

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

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved

+ Add

- + Add row
- ≡ Add group
- ⊞ Add related entity

Under field, select **Product**:

Edit filters: Cases



Reset to default Delete all filters

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

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	
<input type="checkbox"/>	Select a field		

- Modified On
- Next Sla
- On Hold Time (Minutes)
- Origin
- Owner
- Owning Business Unit
- Parent Case
- Pre Create Entity Attachments Id
- Pre Create Notes Id
- Priority
- Product**
- Received As

In the Operator field, select **Begins with**

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Equals	Value

- Equals
- Does not equal
- Contains data
- Does not contain data
- Contains
- Does not contain
- Begins with**
- Does not begin with
- Ends with
- Does not end with
- Under
- Not Under

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

Edit filters: Cases

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

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

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Begins with	CMP

[+ Add](#)

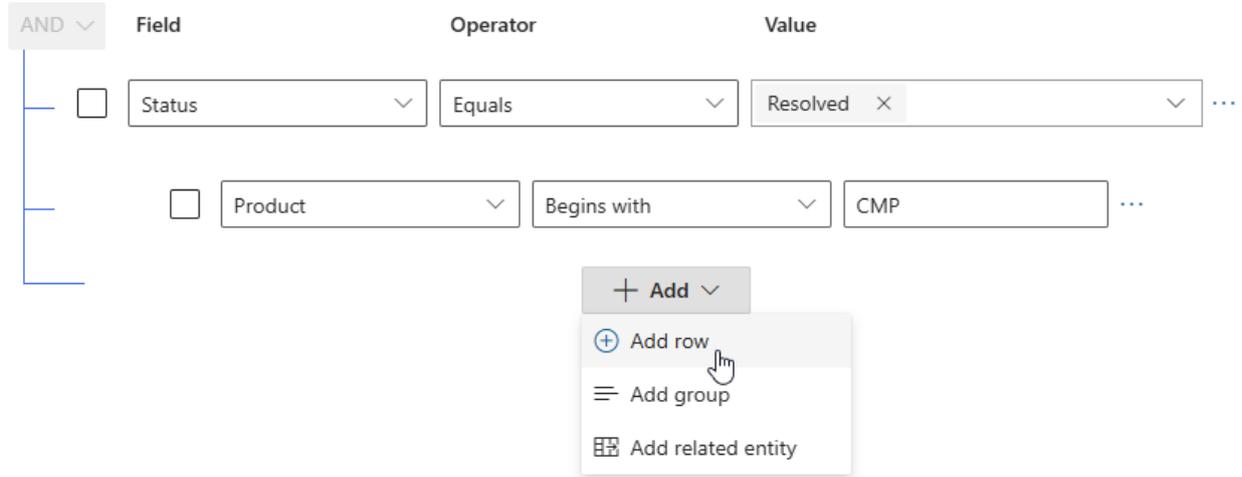
Add a date range using the field 'Deactivated On'.

Click **Add**> add row

Edit filters: Cases

 Reset to default  Delete all filters

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



AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Begins with	CMP

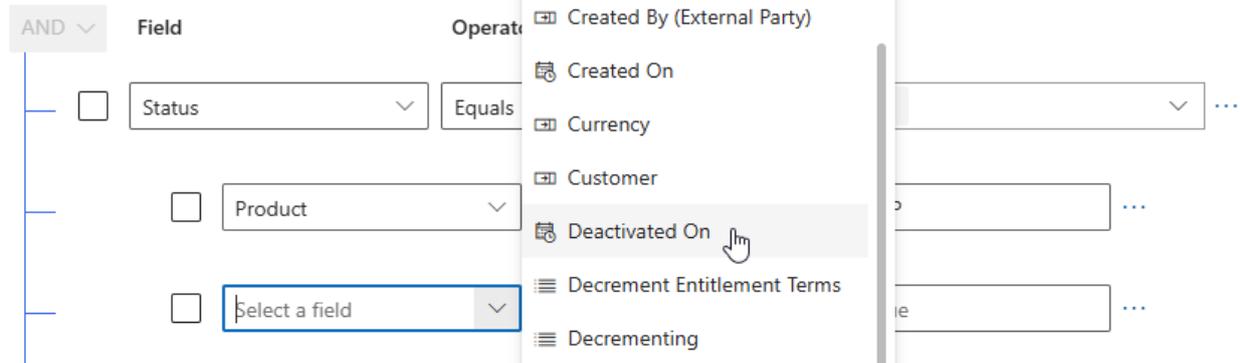
- + Add
- + Add row
- ≡ Add group
- ⊞ Add related entity

Within Field, select **Deactivated On**

Edit filters: Cases

 Reset to default  Delete all filters

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



AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Begins with	CMP
<input type="checkbox"/>	select a field	Equals	Resolved

- Contract Line
- Copilot Engaged
- Created By
- Created By (Delegate)
- Created By (External Party)
- Created On
- Currency
- Customer
- Deactivated On
- Decrement Entitlement Terms
- 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.

Edit filters: Cases

Reset to default Delete all filters

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

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Begins with	...
<input type="checkbox"/>	Deactivated On	On	...

On

- On
- On or after
- On Or Before
- Yesterday
- Today
- Tomorrow
- Next 7 Days
- Last 7 days
- Next week
- Last week
- This week
- Next month
- Last month
- This month
- Next year
- Last year
- This year
- Last x hours
- Next x hours
- Last x days
- Next x days
- Last x weeks
- Next x weeks
- Last x months
- Next x months
- Last x years

Select date range & **Apply**

Edit filters: Cases



Reset to default Delete all filters

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

AND	Field	Operator	Value
<input type="checkbox"/>	Status	Equals	Resolved
<input type="checkbox"/>	Product	Begins with	CMP
<input type="checkbox"/>	Deactivated On	Last week	
Add			

Apply

Apply the current advanced filters

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:

← | ↻ | 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)

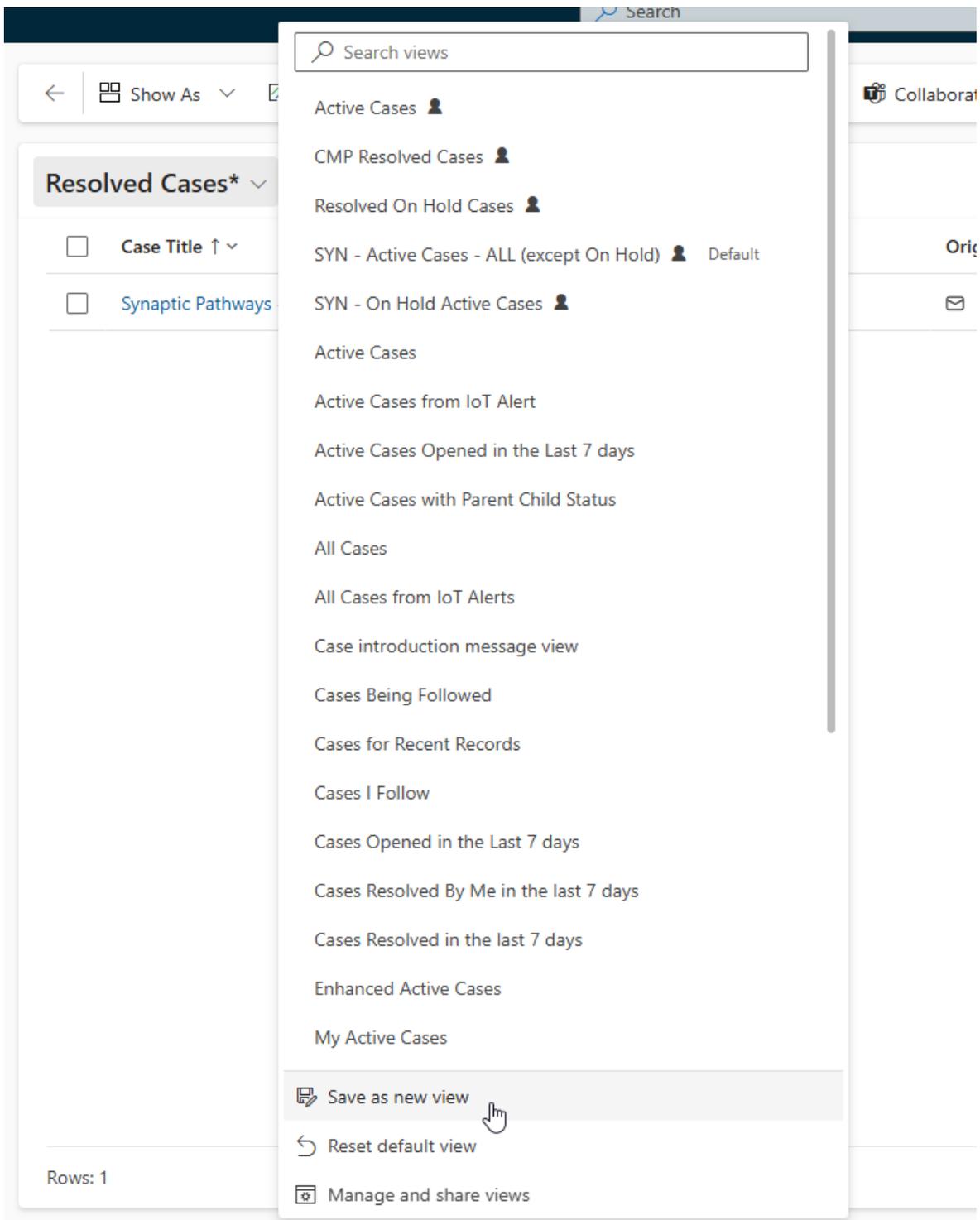
Contact **CMP - Own Branded Site** ▾
CMP - Own Branded Site

[Advanced lookup](#)

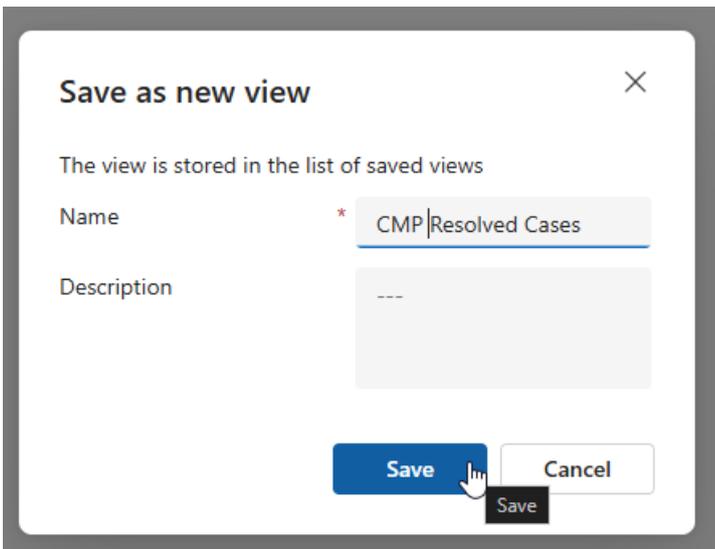
Product CMP

Fixed in release? Add version ---

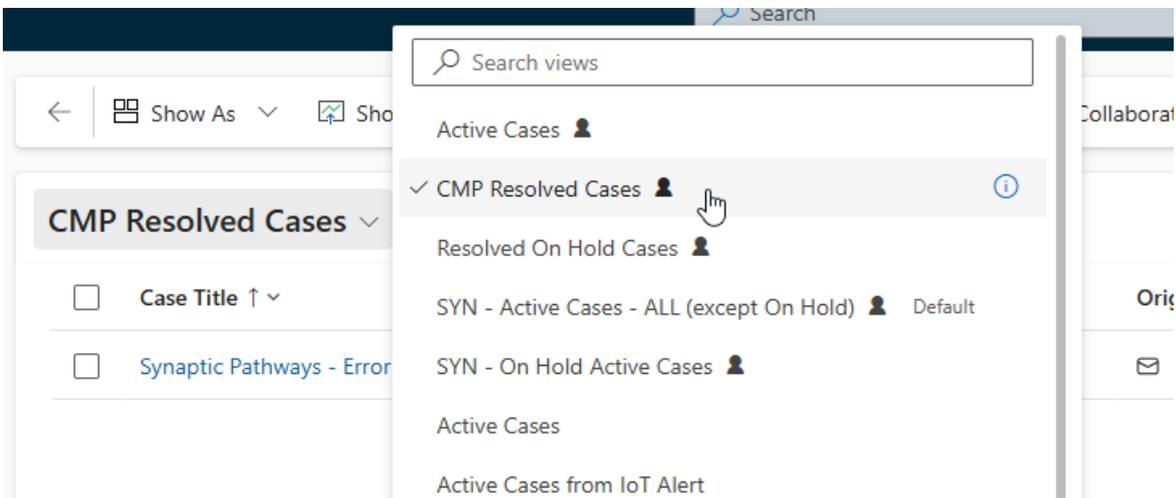
We will now save our changes. Click into the view dropdown, select **Save as new view**:



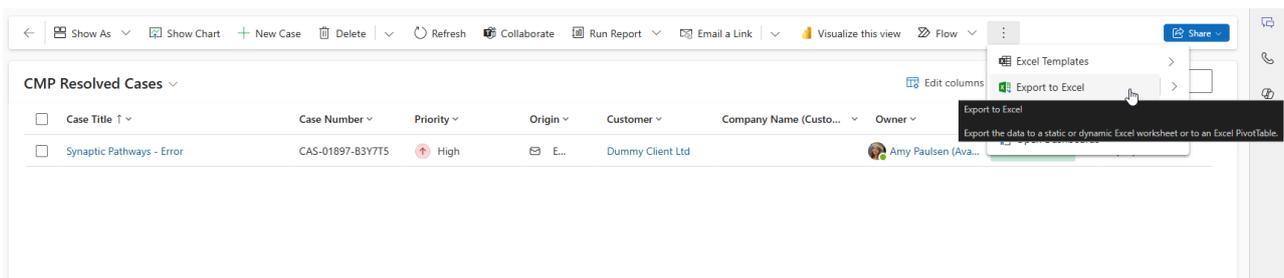
Type a name for your new view and **Save**



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



When you need to export the resolved cases, go to the three dots on the top right and **Export to Excel**.



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.