vCases Pro v1.6.1

User Manual

Version: v1
Date: 10/11/2025

1 Change Control

Date	Version	Description	Author
2025/09	1.6.0	General - Tasks can now be associated with vCases. - When you save a vNote, you can now automatically change the status of the vCase. - Added real time notifications. vNotes: - Background color now changes when you add an internal note. - Better support for images and tables (imported from emails)	jfcc
2025/06	1.5.6	- When a vCase is closed, and there is a follow-up email, now the vContacts from the original vCase are copied. - Solved an issue that resulted in vContacts not to be connected with CRM entities. v.1.5.5 - Issue with copying admin language files. v.1.5.4 - Now, after creating a vCase, you are redirected to DetailView (was listView). - Manifest pointed to wrong language files for admin. v.1.5.3 - "origin" was not set when originating from email. - if you include in the template the variable $list_subscribers, then from now on, User´s names are now included instead of user´s emails - lastagent_ref added to DB as a pointer to the last_agent chose in list. - For distribution method, now Roles and Static list are also supported. - A SPAM button is added to "clean" up recently opened vCases as the result of an email. - When a non-subscriber sends an email to an already opened vCase, this will be integrated as an internal comment (without adding the person to the subscribers. Various options are offered to the agents to proceed (block user, accept message or blacklist)	

		- Slightly enhanced listView for vWorkChannels - Only send emails to subscribers that have not been blocked ! - Added basic configuration (admin) for vWorkChannels - For incoming email addresses, letter-case was taken into account (now case insensitive). New vContacts were erroneously added. - New icons and favicons	
2025/04	1.5.2	- Attachment names included “(Copy)”. This is removed. - When an email is received with attachments, the names of the attachments are now also included in the vNote. (the actual attachment is in the attachment section). - Blocked vContacts are now “red”. - You can now block and unblock manually from the vContact list. - More elaborate issue handling. - if you include in the template the variable $list_subscribers, then from now on, User´s names are now included instead of user´s emails - lastagent_ref added to DB as a pointer to the last_agent chose in list. - For distribution method, now Roles and Static list are also supported. - Added support for “No reply” originating emails.	jfcc
2025/03	1.5.1	- When you create a vCase marked as “external”, automatically the related Person and the Creator of the vCase are added as Subscribers. - Document expanded with additional rules implemented.	jfcc
2025/03	1.5.0	First released version	jfcc

2 Introduction

vCasesPro is targeting all enterprises that use email interaction (reluctantly or not ;-)) with their customers. Although customer portals have been pushed by companies to integrate communication, support, etc. in real life, many end-customers just rely on email communication. So, companies need some tools to handle this. There are a number of well known applications in the market that handle this interaction, but the price tags of those have rocketed in the last years.

In a nutshell, vCasesPro offers the connection between email communication and traditional case/ticket management. With other words, end-users can send emails, and these will be converted to Cases (or updated) and viceversa, when vNotes are added to the vCases, this will result in email notifications to those end-users.

vCasesPro support multiple “workchannels” to organize and process different types of communication. So for example, you can have different groups handling, in different ways, support, sales enquiries, company internal requests, etc.

This document will describe all the magic that is used to make this basic interaction, as user friendly as possible.

3 Compatibility Matrix

You will require:

- SuiteCRM 71X, or SuiteCRM 8.X

As we as ValeDale´s following modules:

- Common
- vReports

At installation vCases will check that the right version of the ValeDale packages are installed.

4 Install and Upgrade vCasesPro

Go to module loader and install de vCasesPro package. You can upgrade to new version by following the same procedure.

vCasesPro will:

- Install the vCasesPro package itself
- Install the vCasesPro View, with corresponding Forms and Reports
- Add, if you do not already have it, a virtual relationship in vReports between vCases and vNotes (do not delete it…)

If you already had vCases installed, vCasesPro will add the vCasesPro functionality, and the standard vCases views will be overwritten.

4.1 Configuration vCases

When you install vCases it will check if certain variables are already defined. If not, default values are set. The configuration information is the following:

Note that currently the settings are “English” oriented, see later in this section to support other languages.

```
$sugar_config['vCases']['replyAbove'] = "--- Reply above this line ---";
$sugar_config['vCases']['extractPatterns']= [];
$sugar_config['vCases']['extractPatterns'][] = '/--- Reply above this line ---/i';
$sugar_config['vCases']['extractPatterns'][] = '/-------- Forwarded Message --------/i';
$sugar_config['vCases']['extractPatterns'][] = '/On [^\\r\\n]*(?:\\n\\r?|\\r\\n)?[^\\r\\n]*wrote:/im';
$sugar_config['vCases']['extractPatterns'][] = '/^>+/m';
$sugar_config['vCases']['extractPatterns'][] = '/^From: .*?$/im';
$sugar_config['vCases']['extractPatterns'][] = '/^Sent: .*?$/im';
$sugar_config['vCases']['extractPatterns'][] = '/^To: .*?$/im';
$sugar_config['vCases']['emailTemplates'][0] = 'vde_t_emailNotification';
```

Explanation:

- 'replyAbove' : is used by vCasesPro to add a line on top of the email, so that when users reply, the information below is discarded.
- 'extractPatterns' : this is used to try to reduce “duplicated” information. If you don´t define any entry for this config variable, then some standard “english” patterns will be used. The first one is automatically generated using ‘replyAbove”. NOTE that all these entries are regular expressions !!
- A standard email template is automatically imported at first installation. You can define for each vWorkChannel if you want to use the standard or different email template.

4.1.1 Changing configuration

You can change the standard configuration settings as follows:

If not already created, create under custom/modules/vde_vCases/config a file called “config.php”.

Whatever you put in this file will overwrite the default settings. Therefore, you only need to define what you want to change.

The standard configuration settings are under: custom/modules/vde_vCases/config/config.php

Now, suppose you want to add support for additional languages in the extractPatters (your customers may be using email client with other languages”. When adding more rules, you have to consider that the first rule that applies will be the one used, so “translations” should be added in the correct order.

The given file includes data to support Spanish and Dutch. Comment the English part and uncomment your language to just support one language. Or just mix and match as you need.

```
<?php

if (!defined('sugarEntry') || !sugarEntry)
   die('Not A Valid Entry Point');

/*English*/

 $vCaseconfig['replyAbove'] = 'Reply above this line';
 $vCaseconfig['extractPatterns'] =  [ //English
        '/-{2,}\s*Original message\s*-{2,}/im',
        '/-{2,}\s*Forwarded Message\s*-{2,}/im',
        '/\bOn\b[\s\S]{0,30}?wrote:/im',
        '/-{2,}\s*'.preg_replace('/\s+/', '\\s+', $configuratorObj->config['vCases']['replyAbove']).'\s*-{2,}/im', //
Zendesk delimiter
      ];
  $vCaseconfig['emailTemplates'] = ['vde_t_emailNotification'];

/*Spanish
```

```
/*
$vCaseconfig['replyAbove'] = 'Responder sobre esta línea';
$vCaseconfig['extractPatterns'] = [ // Español
   '/-{2,}\s*Mensaje original\s*-{2,}/im',
   '/-{2,}\s*Mensaje reenviado\s*-{2,}/im',
   '/\bEl\b[\s\S]{0,15}?\bde\b[\s\S]{0,30}?escribió:/im',
   '/-{2,}\s*' . preg_replace('/\s+/', '\\s+', $configuratorObj->config['vCases']['replyAbove']) . '\s*-{2,}/im', //
Delimitador de Zendesk
];

$vCaseconfig['emailTemplates'] = ['vde_t_emailNotification'];
*/

/*Dutch*/

/*
  $vCaseconfig['replyAbove'] = 'Antwoord boven deze regel';
   * $vCaseconfig['extractPatterns'] = [ // Nederlands
   '/-{2,}\s*Oorspronkelijk bericht\s*-{2,}/im',
   '/-{2,}\s*Doorgestuurd bericht\s*-{2,}/im',
   '/\bOp\b[\s\S]{0,30}?schreef:/im',
   '/-{2,}\s*' . preg_replace('/\s+/', '\\s+', $configuratorObj->config['vCases']['replyAbove']) . '\s*-{2,}/im', //
Zendesk-scheiding
];

$vCaseconfig['emailTemplates'] = ['vde_t_emailNotification'];
*/
```

Notes:

- At installation time, if some data is already defined in your config_override (php), it will NOT be overwritten.
- In the admin section, you can “force” the standard configuration values AND your custom values to be processed.
- If you want the “factory settings” you will need to delete your custom data and force the standard configuration.

4.2 Email template

By default, the template “vCase Generic” will be installed with vCasePro (if you change it, it will not be overwritten when upgrading). This template will be used for all notifications.

Note that besides the standard vCase information supported by the CRM templating system, the following variables can be used:

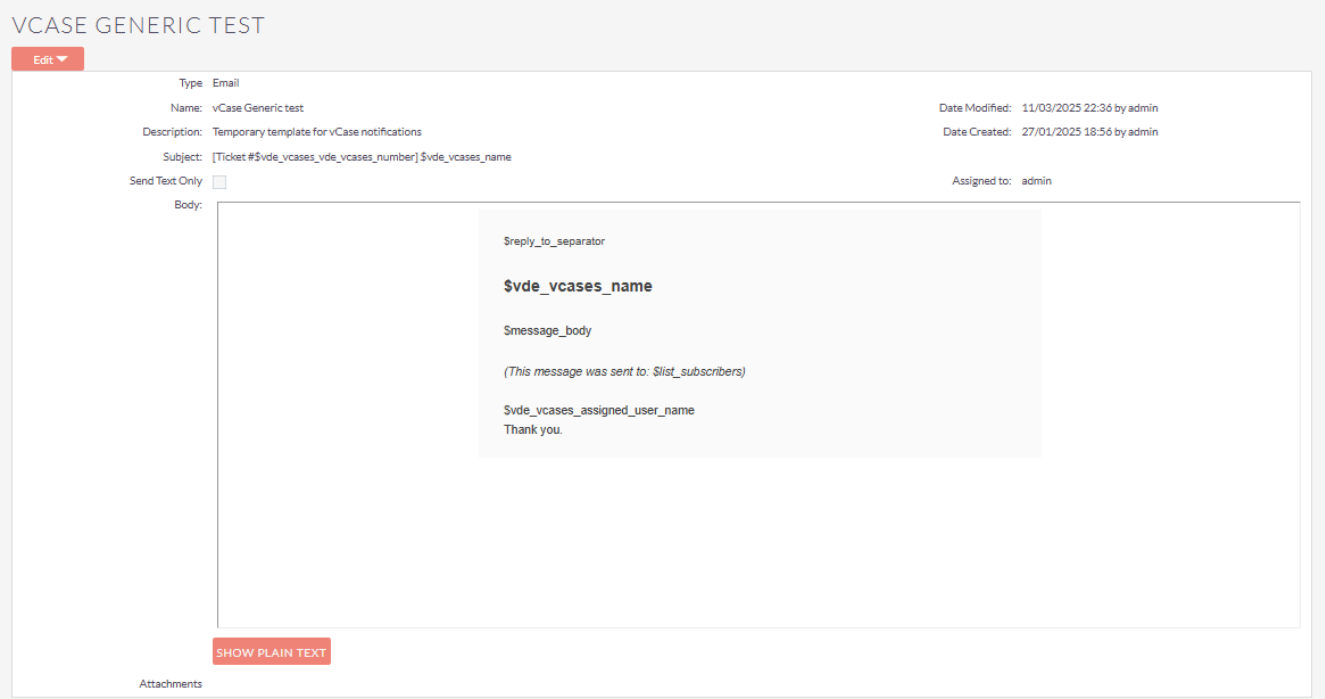
- $reply_to_separator: as defined in configuration.
- $message_body : this is the “cleaned html” body text of the original email.

- $list_subscribers : this is the list of email addresses that will be notified.

In addition, the Subject of the email will be preceded by the “update” or “new” labels as defined in the language files. For English, these are:

```
'LBL_NEW_VCASE_SUBJECT' => 'New ticket created',
'LBL_UPDATE_VCASE_SUBJECT' => 'Update ticket',
```

Note: the language used will be the language for the default user (1).



4.3 Scheduler

To automatically close vCases in “Resolved” status after the resolve time indicated in the vWorkChannel, you need to activate the scheduler bundled with the package.

1. Go to admin, schedulers, Create.
2. Look for “vCases” in Jobs, and set the time to Every 24 hours, every day, or alternatively 0 0 * * * to run it at midnight every day.

4.4 Example scenarios based on type of company

To help you in setting-up the most appropriate configuration for your company, we will discuss three scenarios.

vCase scenarios:

1. One man band
2. Small group of do it all
3. Specialized groups

4.4.1 vCase scenarios set-up

4.4.1.1 One man band

vWorkchannels:

- create 1 vWorkchannel with for example "Support" as name.
    - Assign 1 Inbound email account (normally support@yourcompany.com)
    - Assign 1 Outbound email account (normally support@yourcompany)
    - Distribution: single user
    - Agent: normally you would select yourself (your name will be included in the replies if you use the standard email template).

Extras: if you want to make things fancier and for example separate incoming messages based on the theme (support, administration, sales, …) You can create for each subject a vWorkchannel and define it in a similar way as above, e.g.
Additional vWorkchannel:

- Assign 1 Inbound email account (e.g. sales@yourcompany.com)
- Assign 1 Outbound email account (normally sales@yourcompany)
- Distribution: single user
- Agent: yourself

vCases:
If you manage the vCases by yourself, you will get in the list View the necessary information to organize your activities. Probably the main areas of interests are:

1. Any new vCase ?
2. Any response to older vCases ?

In the list view you will see by default:
Report to the left: Latest vCases (ordered from most recent to older) that are not closed and are assigned to you.
Report to the right: Also, you will see a report with the latest vNotes to vCases assigned to you that have been added recently.
You can change the filters of both reports if you want to dive further into the activities.
Besides these Reports, you will see additional information in the dashboards and other supportive reports.

4.4.1.2 Scenario: Small group of do it all

This scenario is very similar to the previous one. The main difference is that you probably want to distribute the vCases between the different people in the team. You can do this using a round robin distribution where you identify all individual agents, or you can assign a role to the agents and just set the distribution to role.

In case you insist on manually distributing the vCases, you could potentially assign them all to the same "supervisor" and the supervisor can then re-assign the vCases to another agent.
Operations would be similar to the previous scenario.

Note that currently, if an agent goes on vacation, the system does not take this into account. So potentially you could remove the person from the automatic distribution list and ask the remaining agents to pick up the open vCases of the person that is not present.

4.4.1.3 Scenario: Specialized groups

In this case, you will probably want to define one vWorkchannel for each specialization.
The rest of the operation will be similar to the previous scenario. Note that you can search/filter in the "New vCases" Report based on the vWorkChannel (e.g. sales, support, etc.)

5 Using vCasesPro

Note: as vCasesPro is a superset of vCases, the functionality of vCases is supported by vCasesPro. To simplify things, the standard vCases information is included as part of this description.

The use of vCasesPro should be quite intuitive.

Note that user with ID: "1" is used for automatic creation of vNotes. vCasesPro users should NOT use this same id when handling vCases as the system otherwise would not be able to differentiate between "system" created elements and elements created by the specific user. This is relevant for reports, "notifications", etc.

5.1 New role: agentvnotes

vCases introduces a new role. This role is automatically generated when you install vCasesPro if it does not already exist:

agentvnotes

> *Both id and name are set to the same value, but the system ONLY checks on the id. If you create your own role "agentvnotes", this will not work as it will get a random id.*

All users that have this role assigned (they can have others too of course), will be able to add and see internal comments. The administrator will also have this capability.

5.2 Working with vWorkChannels

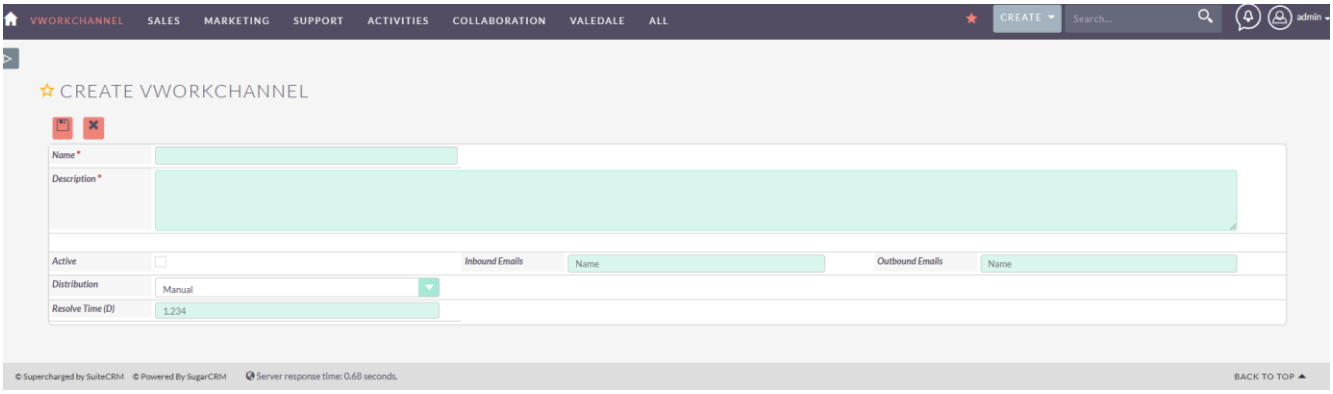
vWorkChannels are part of the ValeDale Common packages. It is an abstract concept that connects agents (actors) to activities (actions).

vCasePro uses vWorkchannels for various purposes:

- Determine how vCases are assigned
- Determine the group of agents among whom vChannels will be assigned.

vWorkChannel must be set-up for handing both incoming email and outgoing notifications.

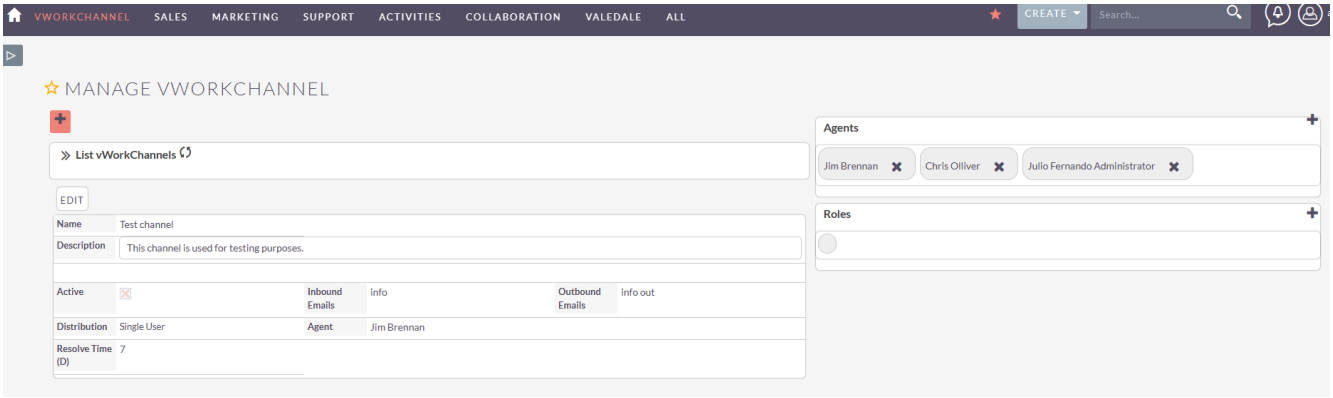
5.2.1 Setting up a vWorkChannel



Besides giving the vWorkChannel a decent name and an useful description, the following fields apply:

- Active: if not checked, vCasesPro will not send notification nor process incoming email.
- Inbound Emails: you need to select an Inbound Email account (please refer to CRM documentation on how to set this up; also check out next section on specifics for vCasePro). All emails received through this Inbound account will be processed by vCasePro.
- Outbound Emails: you need to select an OutBound Email account (please refer to CRM documentation on how to set this up; also check out next section on specifics for vCasePro). This outbound account will be used to send email notifications.
- Distribution: You have the following choices:
    - Manual: no automatic assignment. Assumes that a supervisor will assign the vCases, or that a pool of agents manually pick vCases.
    - Single User: all vCases will be assigned to the user/agent you specify
    - Roles: vCasePro will pick users/agents from the associated roles (the roles are assigned after you create the vWorkChannel
    - Agent List: Same as with roles, but from Agent list.
- Resolve time : this is the number of days that after being in “Resolved” status, the vCase will automatically be closed. Note that you need to activate the corresponding scheduler for this to work (see section: 4.3)

After the creation of the vWorkChannel, you can add agents and Roles to it.



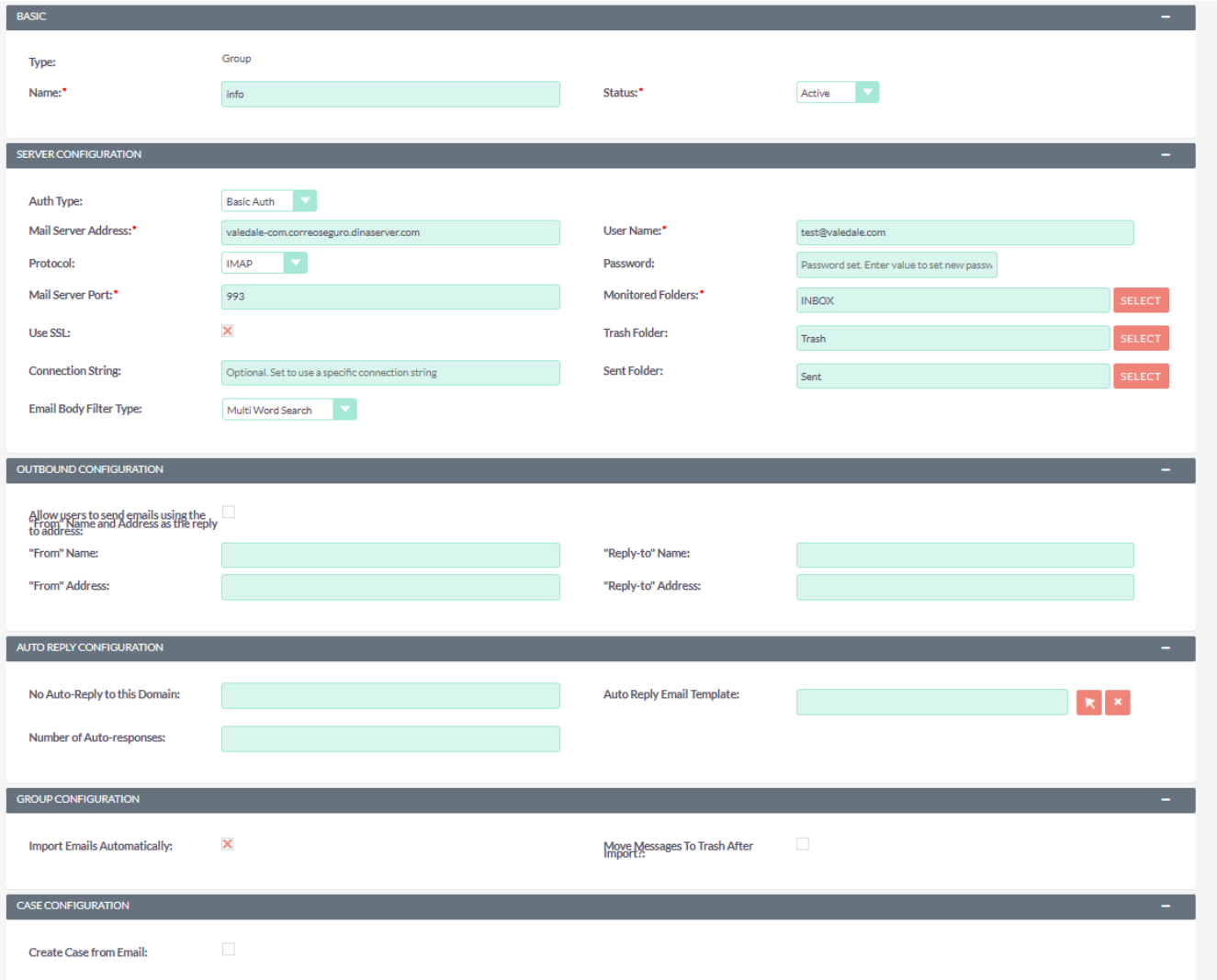
5.3 Inbound and Outbound Accounts

5.3.1 Inbound Email

You need to set-up an inbound email account if you want to process incoming emails. You can set-up the Inbound emails when you go to Admin, Email Settings, section “Inbound Email”. The basic concepts are:

- We suggest that you create a “Group” account, as multiple users will access it (although indirectly)
- Make sure that you can receive email (login, pwd, ports, etc.)
- You don´t have to create a “Case” automatically unless you want to (so you don´t have to select the last option unless you want to…) . **vCasesPro** will automatically generate vCases if the related vWorkChannel is active.
- vCases will currently not make use of the Outbound configuration (Outbound Email setting is used for this)

You can see in the example below an Inbound email account with name “Info” set up for test@valedale.com. If you have an active vWorkChannel pointing to this inbound email account, vCasesPro will generate vCases when appropriate.



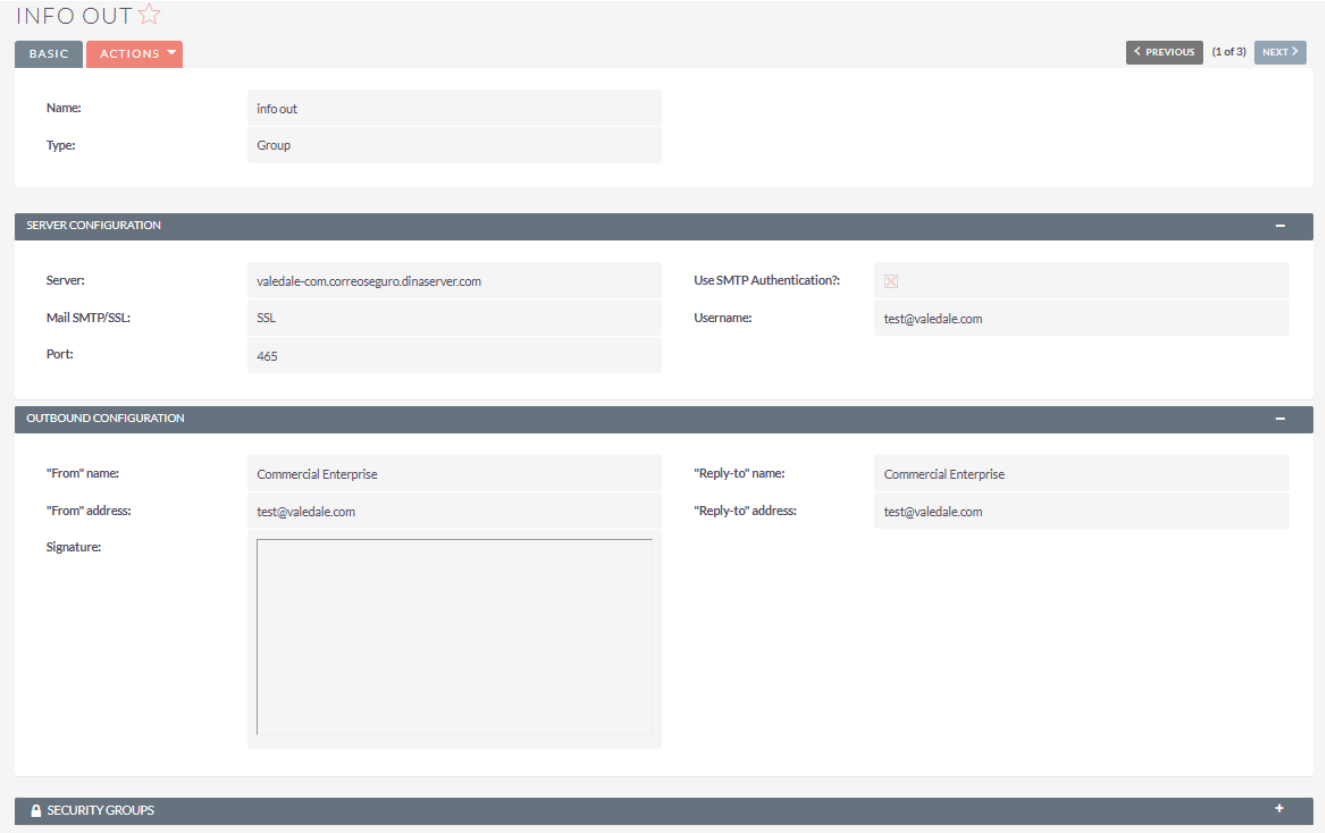
5.3.2 Outbound Email

You also need to set-up an outbound email account for the email notifications. Again, you can set-up such an account through Admin, Email settings, Outbound email.

The example below shows an “info out” account with the appropriate data.

Note that currently:

- Reply information is not taken into account



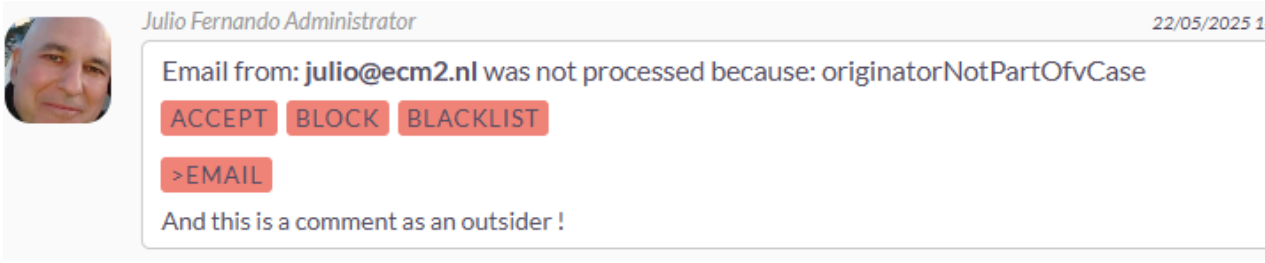
5.4 Receiving an email through an active vWorkChannel

When a vWorkChannel is active, all emails received/imported in the defined inbound email account will be processed.

The general implemented rules are:

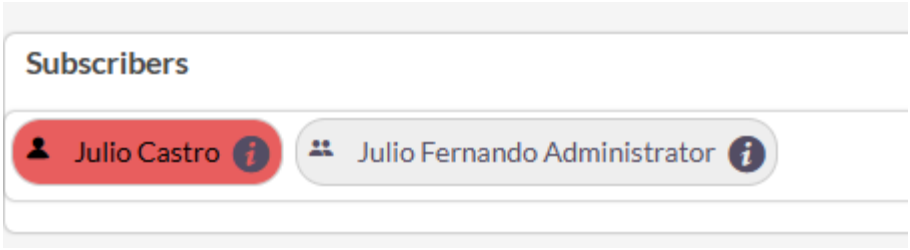
- Only emails with an active vWorkChannel are processed.
- Content is cleaned up to discard superfluous information (check out configuration section)
- Empty emails are discarded (Configuration section 4.1) i.e. certain data is deleted automatically.
- System will check if sending user is in the global blacklist. If so, email will not be processed.
- When an email is received through an active vWorkChannel, all the emails included will be considered "Subscribers" to the vCase. Subscribers can also add additional subscribers. Subscribers will all receive notifications at the creation of a vCase AND will be able to reply/comment on that vCase. Exceptions:
    - If a user with a specific email tries to add to a specific vCase (number) and that email is not part of the subscribers list, it will be processed as an internal Message. User is NOT added as a vContact (to avoid unwanted activations or "fishing"). The agent gets various options:
        - Accept the message (message will be added and email sender will be added to the subscriber list. vNote action messages disappear)
        - Block email sender (from this vCase)

- Blacklist email sender (sender will be blocked from future automatic vCase creation)



- If a person sends more than 3 emails related to a specific vCase, first, that person will be preBlocked (message will be included as internal message, no notifications). After 5 minutes the person will be "active" again, However, if in the preBlocked state, that person sends another email to that vCase, the email will be blocked and no further emails will be processes until a user "deblocks" the person.

- If an email is not known, automatically, a Contact is generated. Note that the system will check for Contacts, Leads and Users.
- From and "reply-to" address are checked on "No reply". If this appears, notifications do not take place and NO vContacts are added. An internal comment referring to "no-reply" is also added.
- For each "subscriber", a vContact is generated. Note that this is NOT a direct link to an entity. It stands by itself (this is done mainly for performance issues).
- Als emails coming from "Contacts" or "Leads" will result in vCases of type "external". This means that notifications will apply. Emails coming from Users, will result in not external cases, i.e. no notifications will be sent for vCase updates.
- If more than 2 emails are received from the same originator within 5 minutes, the subscriber will pass to state: preBlocked. This also applies when the subscriber sends twice the same message in that timeframe (e.g. out of office loop !!). Those emails will NOT be processed.
- If the subscriber sends a third email with given timeframe, it will pass to "blocked" and after that the subscriber will not longer be able to add to a given ticket. On the other hand, if after given timeframe a user sends an email, the status will be reset. See below example of the first subscriber marked as blocked (red color).



- Attachments in emails are automatically included in the vCase. Note that these are copies of the original attachments, so, if the email is deleted, the attachments will still be available in the vCase.

The system will automatically relate the sender to the vCase. The sender can be a User, Contact or Lead. In addition, it will try to relate an account. If the related person is connected to an account this will be used. Else,

the system will try to connect to an account based on the email address (and name of the accounts in the CRM).

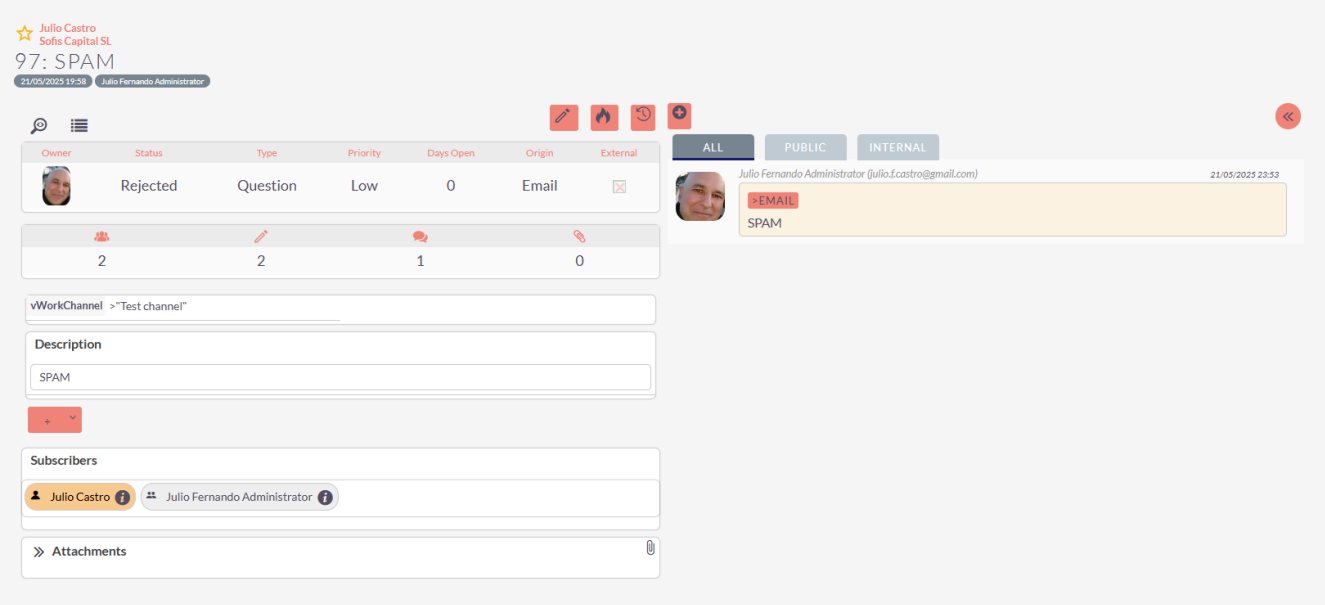
5.4.1 SPAM

Most of the SPAM should be filtered out by your email-provider or your own set rules, however, now and then you will find a vCase that was automatically created as the result of a SPAM email. Not to worry !

Next to the vCase Edit button, we have added a convenient “SPAM” action button (fire icon). This will:

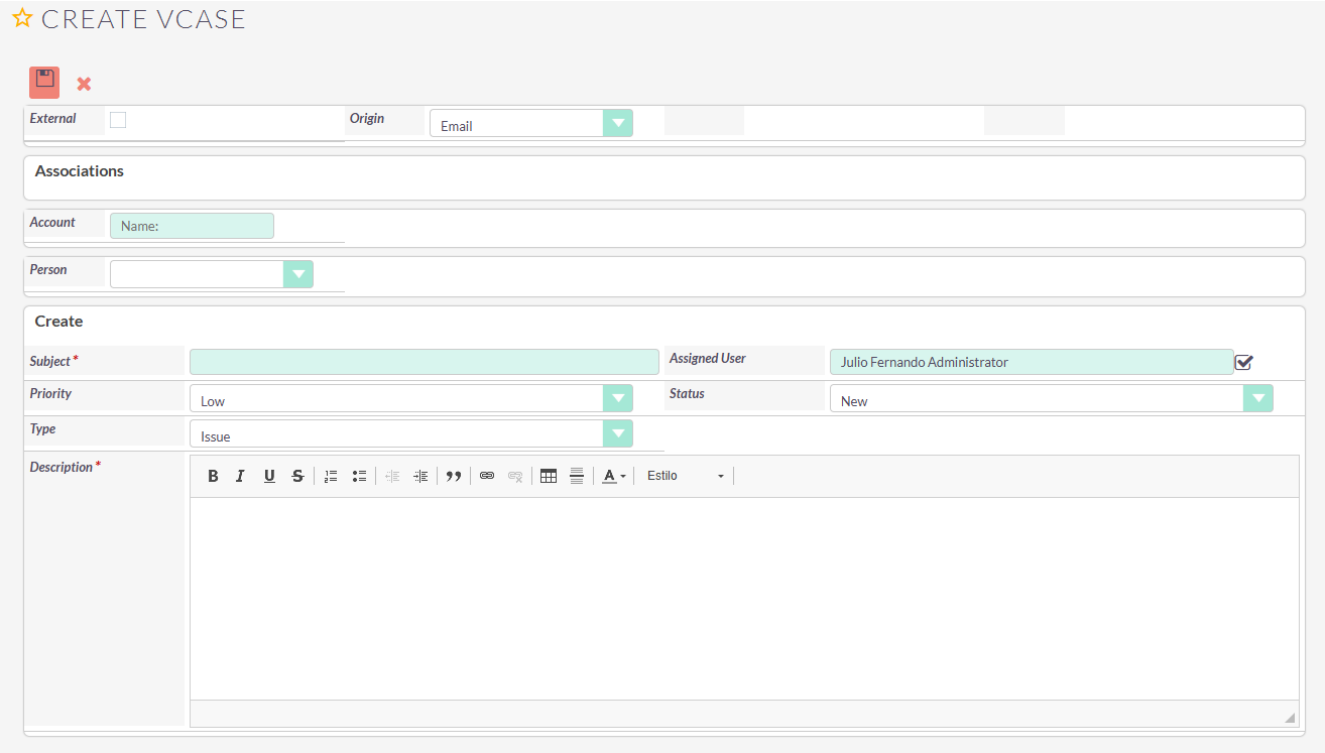
- Set vCase to “Rejected”: this will ensure that the vCase does not appear in most reports
- Change the description and vNote to “SPAM” (no need to hurt your eyes with the SPAM text)
- Add a link in the SPAM vNote to the original email, just in case you want to refer to it in the future.

And the result:



5.5 Creating a vCase

You can create a vCase manually.



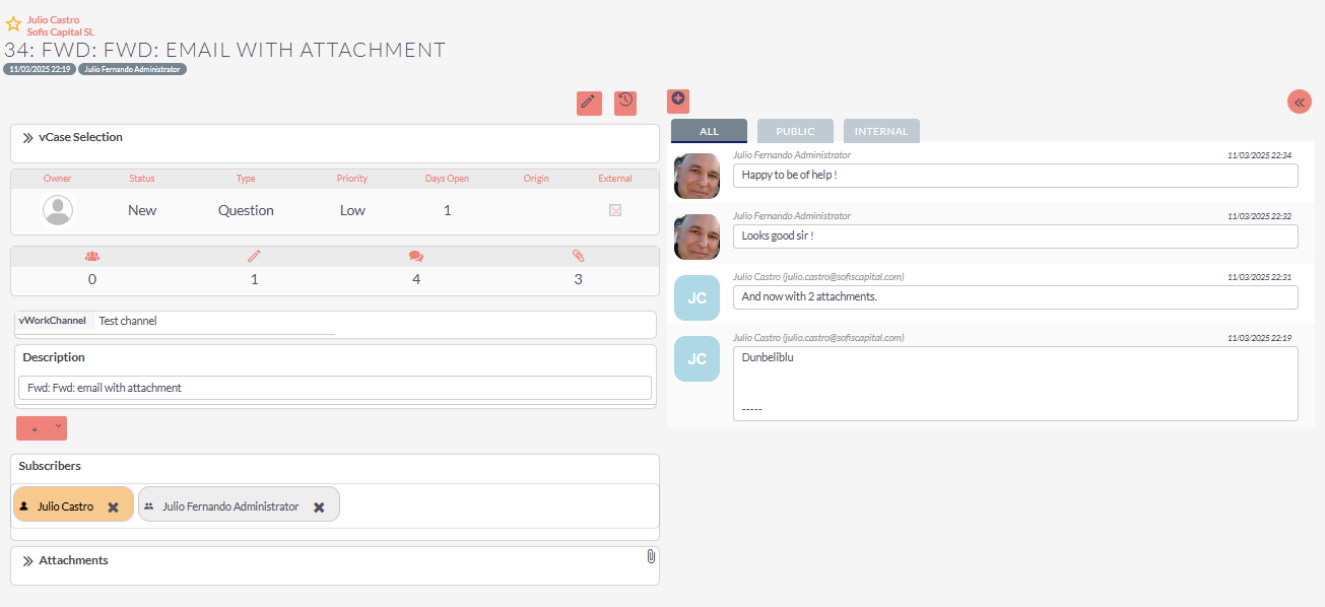
Fields:

- External: select this if you want notifications to be sent to subscribers.
- If you choose “External”, you can select a vWorkChannel.
    - the assigned-to user will automatically be added as a Subscriber UNLESS the email address of the creator corresponds with an active vWorkChannel Inbound email (this actually would be bad practice).
    - The related Person (if defined) will also be added.
    - If you don´t select a vWorkChannel, the system will try to choose one for you when you create the vCase. Rules:
        1. If the assigned-to-user is the sole agent of an active vWorkChannel.
        2. If the assigned-to-user is in the agent list of exactly one active vWorkChannel
        3. If the assigned-to-user
- Origin: to mark the origin of the vCase (this option is currently not used for processing). You can select one of the following options:
    - Email
    - Chat
    - Telephone
    - Customer Portal
    - CRM
- Associations: you can select an account and a Person (Contact, Lead, User)

You can assign a ticket to yourself by clicking on the “” icon.

Once you create the ticket by clicking on the save icon "" you will be sent to the "detail-view" of the vCase.

CREATING A VCASE WILL NOT RESULT IN A NOTIFICATION TO THE SUBSCRIBERS. ONLY WHEN A VNOTE IS ADDED, A NOTIFICATION WILL BE SENT.



Here you can start working on the case by adding comments and changing its characteristics.

Notes:

- External subscribers (Leads and Contacts) are in yellow (to catch the eye).
- Any subscriber can be in red: when blocked.
- If no photo is available in the notes section, the "initials" of the contact are used.
- You can manually add Subscribers

5.6 Select another vCase

vCase offers various ways of accessing vCases.

In the list view, you will find on the right side two dashboards, one personal, one company-wide, with key characteristics of the corresponding vCases.

Below, you will find two reports:

5.6.1 Mass vCases

Shows the latest Mass vCases that are not closed. It shows the basic information about the mass vCase, nr of dependent vCases (vCases that are linked to this mass vCase) and the time of the latest vNote.

5.6.2 Latest activity vCases (latest vNotes)

List of all vCases “in the works” showing activity, specifically, the ones were a vNote was recently added. If marked with “new” it means that the last note is not of the current user. The report takes into account all the vNotes that have not been created by the current user.

You can enhance the report with two filters: depending on whether the related vCase was assigned to the user and more flexibility to show only the ones that have not been “answered” by the user. For unassigned vCases there is another report.

5.6.3 Emails in black list

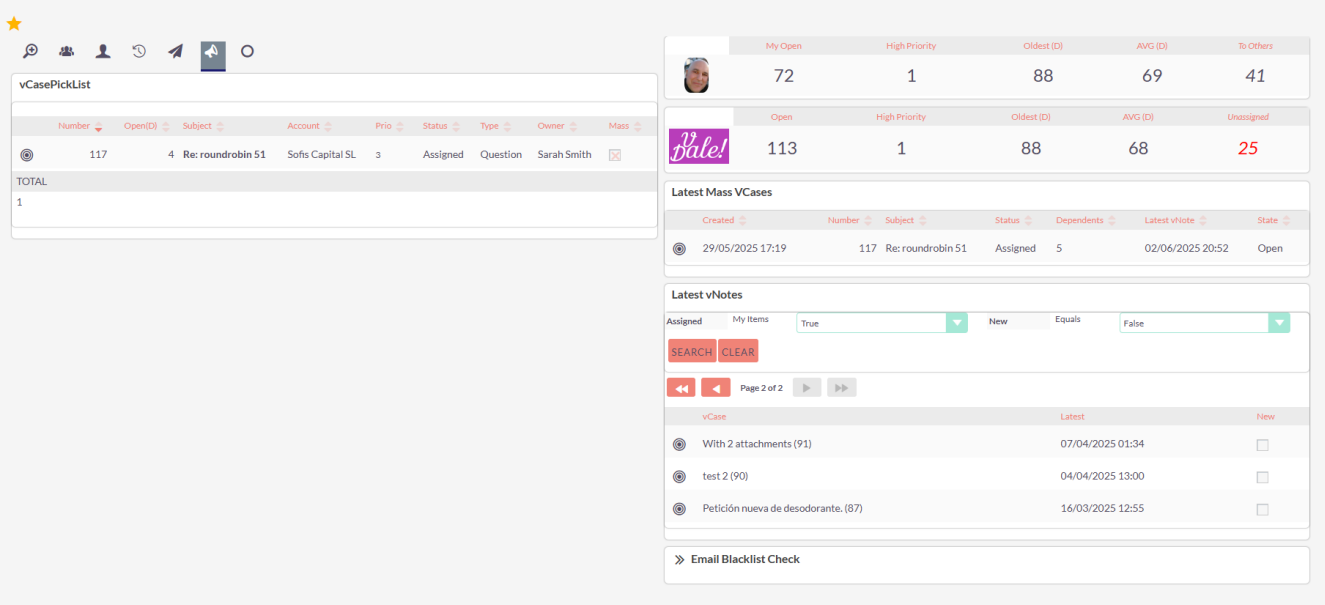
Below that report you can search for emails to check if they are in the blacklist. And of course change their status.

5.6.4 Main vCase Search

On the left side of the list View, you can find a compact report with as default the list of latest “open” vCases (vCases that are being processed).

At the top of the report you see a number of icons that allow you to manage efficiently the filtering and ordering:

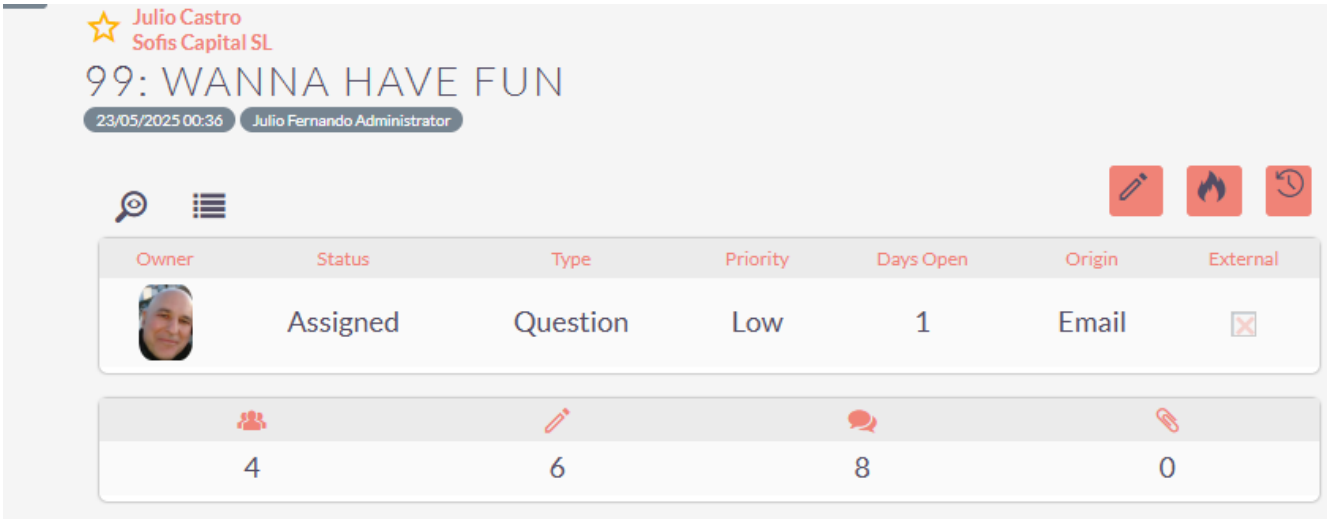
- Expand the compacted form of the report so you can change filters (and compact again)
- Show the “default” report
- Show (My) latest vCases
- My oldest
- vCases the user created and assigned to others
- Latest Mass vCases
- Unassigned vCases



When in Detail View, you also have two quick-access icons to:

- Within the detail context, show the main vCase selection reports
- Go directly to (full) list view.

You can find them above the standard DetailView dashboard.

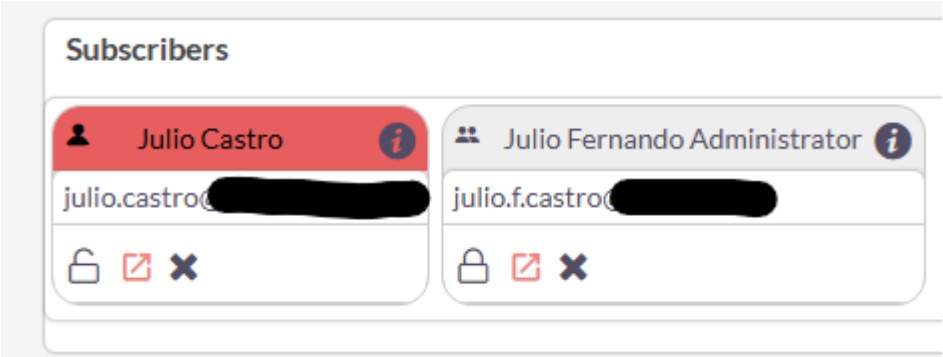


5.7 **Manage subscribers**

Subscribers are Persons that have directly or indirectly shown interest in the vCase. They will be notified whenever a new vNote is added to the vCase.

Subscribers can be managed within the vCase subscribers panel by clicking on the “I” icon.

The email address of the person will appear, as well as some additional functions: block/unblock, send to blacklist, go to person page and delete reference in this vCase (does not delete the person).



As you can see above, the function buttons are state dependent. So the blocked user “Julio Castro” can be unblocked.

Additional rules:

- A person can be blacklisted from the “Subscribers” panel. This will flag the associated email as blacklisted. The person will now appear as blocked. No further operations can be exercised on that Subscriber (blacklist status can still be reset from vCases list view).

5.8 Lifecycle vCase

The following status values are supported:

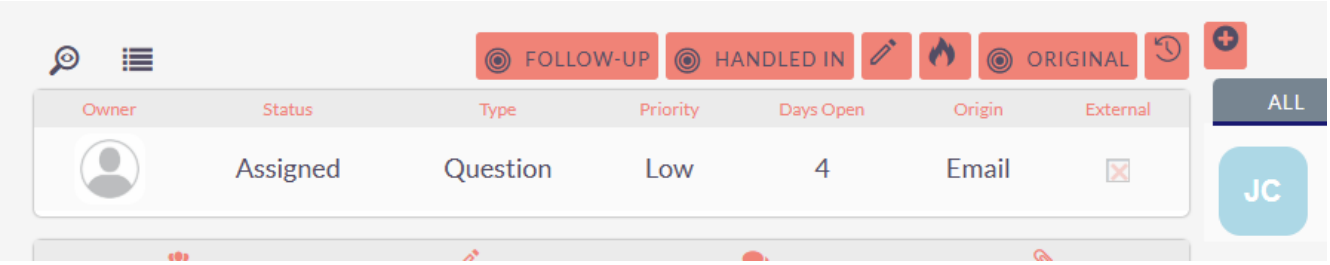
- New : default value
- Assigned : when assigned user is set.
- Resolved: when agent assumes that all work is done but allows party to add to same vCase. System automatically transfers the status back to New or Assigned if an incoming email results in a public note being added.
- Closed: No new incoming emails are added to vNotes of this vCase. New follow-up vCase is automatically created, unless there is already an open follow-up vCase.
- Pending Input: when feedback is expected from subscribers/Originating entity.
- Pending Other: when feedback is expected from others. Normally agent should open a Task.

- Rejected: used for SPAM but can be used for other reasons. Recommended to include reason as a vNote. Incoming emails for vCases with this status will not be processed.
- Duplicate: if for some reason the vCase is closed because the topic is being treated in another vCase. This is a special case of “Closed”. Incoming emails will be associated automatically with the appropriate vCase if one is defined. Else, email will get the same treatment as for a non-subscriber.

vCases can be related to other vCases in the following way (description given bases on pointers):

- vcases_continued_in_id: should be filled in when a vCase was closed, and there is a follow-up vCase. Note that this points to the last follow-up vCase (there can be in time, multiple follow-ups).
- vcases_original_id: should be filled in when the vCase is a follow-up ticket. So Original and Follow-up should point to each-other.
- vcases_handled_in_id: there are 2 scenarios here. When a vCase is a Mass-ticket, other tickets may refere to the Mass ticket using this pointer. Another scenario is if for some reason an existing vCase “A” is being managed in another vCase “B”, then A should point to B. One current scenario is when ticket A is marked as “Duplicate” (it is then considered closed, and being managed in another vCase).

The action bar below is not representative (some options are mutually exclusive, but it does show all “related” vCases. By clicking on the Function button, you can access directly the corresponding vCase.
Note that when there is a “follow-up”, the vCase should be “closed” (i.e. you should normally be editing it).
Handled in: vCase may be open, but most action should take place in the “handler”.
And Original vCase is indeed used for reference (vCase will undergo the normal actions).



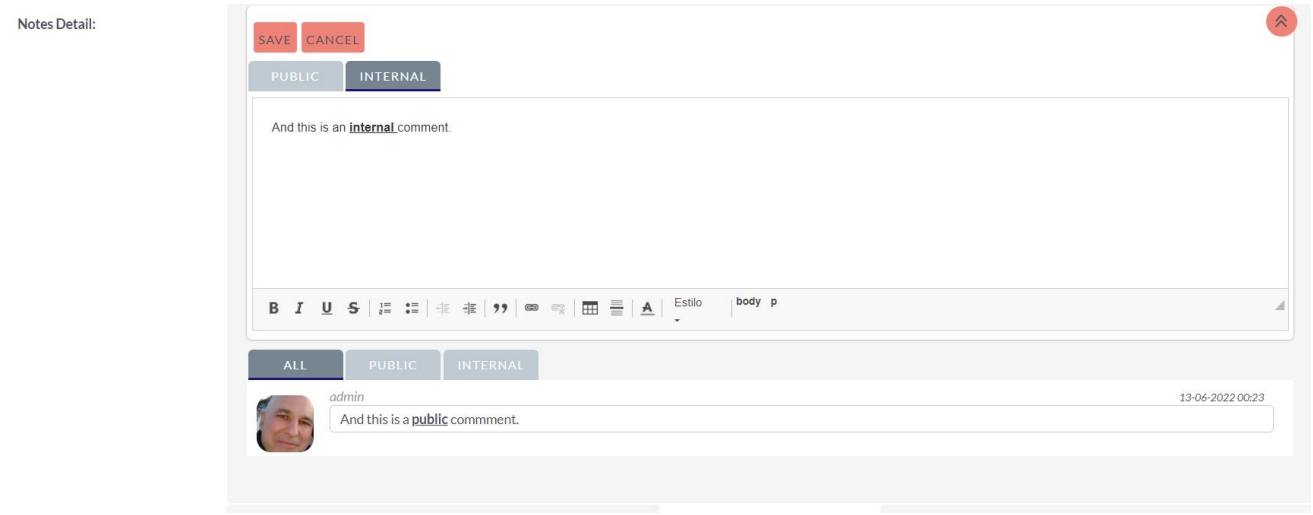
5.9 Dashboards

There are two “dashboards” on the top left of the screen.

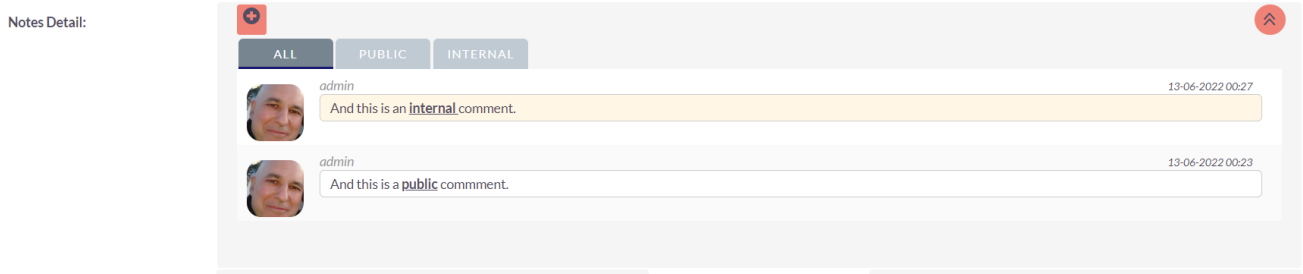
1. Owner picture. Main info about the characteristics of the vCase. Here you will also see the nr of days that the vCase is (or was) Open.
    a. Owner: Picture of the employee the vCase is assigned to. If there is no assignment there will be no picture. If there is an assignment, but no picture was uploaded, you will see a default image
2. Various figures are calculated here automatically to give you a quick impression of the activity around the vCase (so you don´t have to do the counting yourself)
    a. Number of contacts
    b. Number of different people that have added a comment
    c. Number of comments
    d. Number of attachments.
    e. Tasks related to vCase that are not completed / total nr tasks

5.10 **Adding a comment**

Add comments by clicking on the “+” (add-vNote) icon and selecting the “Public” or “Internal” tab as required.

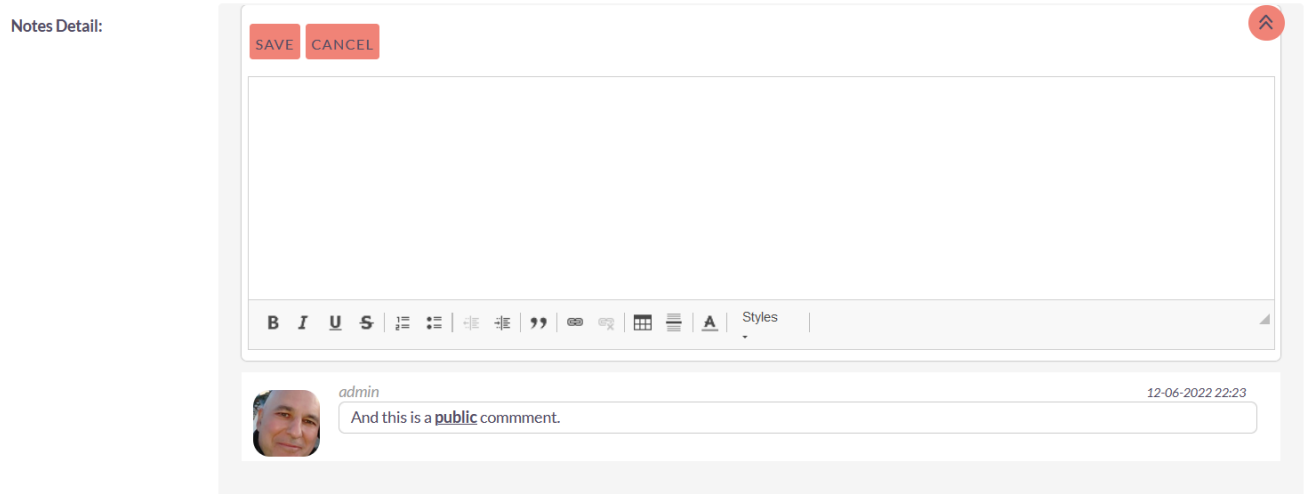


The result, after clicking save, is straightforward:

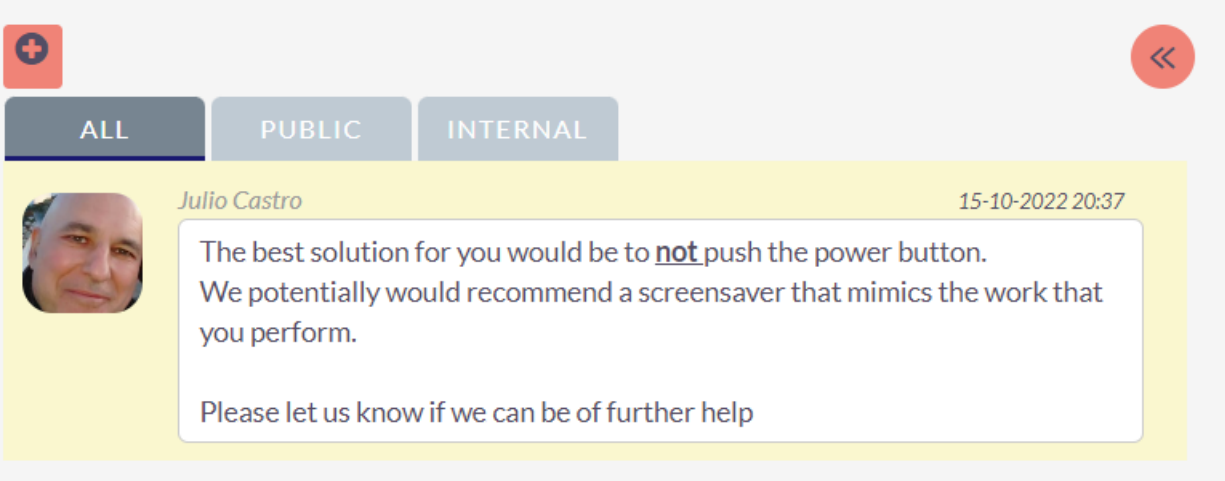


The user can click on the various “Visibility” tabs to “filter” by type of vNote.

For users that do not have the “extended” role, the visibility tabs will not appear, and all the comments will be “Public” by default.



The last thing to point out is the “blinders”-icon at the top right. This is used to collapse and expand the vCasesPro entry.



5.11 Quoting part of a vNote

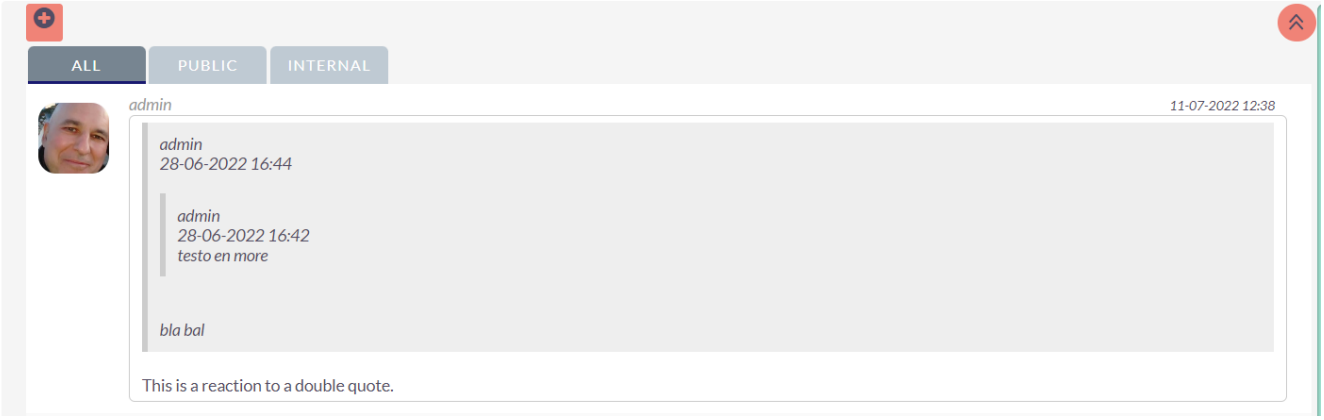
vNote is not meant as a "forum" as we think that this would add a lot of complexity in its use and relatively little added value. It is really meant as a "one-thread" comment interaction. However, sometimes the "conversation" may split temporarily, so it this case, you can just quote the part of the vNote you want to react upon and include your own comment.

In order to do so, you can just copy and quote. The steps are straightforward:

- Click on add note
- Just do a simple browser select and copy of the section you want to quote.

- Select the quote element in the editor

- Paste the selection
- Hit return
- And de-select the quote editor.



5.12 Real time notifications

Real time notifications are supported as of version 1.6.0.

Real time notifications apply:

- User must be an agent of vChat (have the appropriate role assigned)
- Notifications (applies to new vNote for which agent is assigned and not created by agent)

The following notifications are supported: (this will be configurable in a future release)

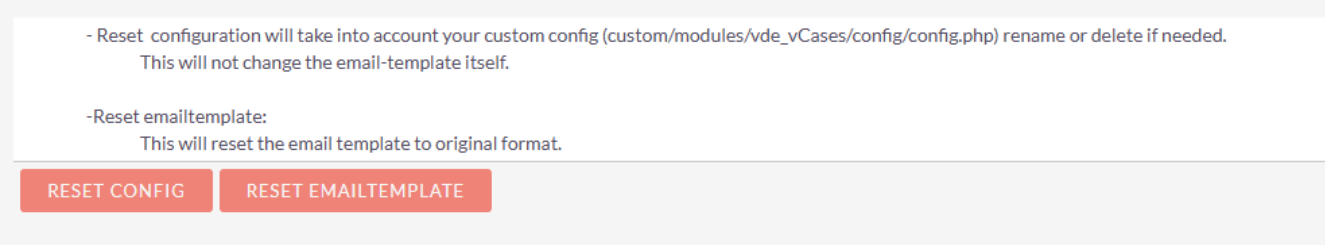
- Windows nofication with number and title of corresponding vCase
- Favicons of all tabs with vCases will be "temporarily modified".
    - Favicon will be reset when agent clicks anywhere on the page.
- If the specific vCase is opened, the list of vNotes will be automatically refreshed (nothing is lost on the working screen – i.e. if you are editing something this will just “stay” on screen).

Note that NOT all elements are automatically (and probably unnecessarily) refreshed to limit DB and network impact.

Concerning the favicon change: the intention is that the user can easily check if he/she has missed a windows notification, however, it should not be visually “imposing”. Also, in order not to affect ongoing editing of an agent, and limit unnecessary View refreshes, the Views are not fully refreshed when vNotes are added by other people. It´s left to the discretion of the agent (time and when…). This means though that when a vNote is added, the agent may see the vNote while some other part of the View may reflect outdated info (e.g. attahchments).

6 Administration

In the admin section you can reset the standard vCasePro configs, and separately, the email Template.



7 Protection

Several rules have been implemented to protect your CRM from being swamped.

- If an email user targets the same vCase more than 3 times in X minutes, the email will be blocked from that vCase.

8 Roadmap

- Use different Views based on type of enterprise
- Refresh button for full View (more agile than a browser refresh…)
- Allow configuration of notification options (email and real time notifications)