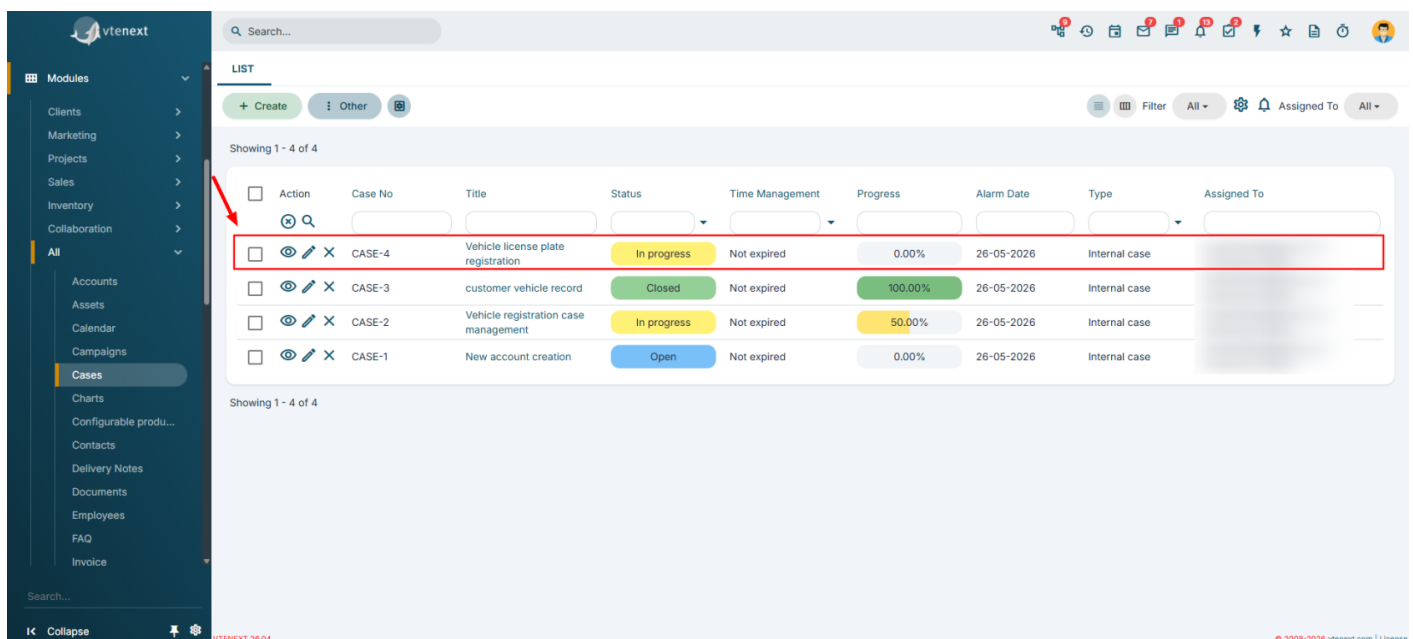


15.11 Cases Module

The **Cases** module is designed to manage reports, issues, and internal requests within the company, enabling a structured and traceable workflow. Below are the main features and functionalities of the **CASES** module, which specifically handles internal cases and subcases:

- **Creation and Management of Cases**
- **Management of Subcases**
- **Progress Tracking**
- **Immediate View of Involved Subcases (or Other Modules)**
- **Processes and Automations**
- **Communication and Collaboration**
- **Reporting and Analysis**
- **Integration with Other CRM Modules**

A well-structured **CASES** module improves operational efficiency, reduces request handling time, and increases transparency within the company. It allows for the management of **CASES** and **SUBCASES** in a way that tracks percentage-based progress and sets reminders through pre-installed processes.



Action	Case No	Title	Status	Time Management	Progress	Alarm Date	Type	Assigned To
☐	CASE-4	Vehicle license plate registration	In progress	Not expired	0.00%	26-05-2026	Internal case	
☐	CASE-3	customer vehicle record	Closed	Not expired	100.00%	26-05-2026	Internal case	
☐	CASE-2	Vehicle registration case management	In progress	Not expired	50.00%	26-05-2026	Internal case	
☐	CASE-1	New account creation	Open	Not expired	0.00%	26-05-2026	Internal case	

Main Page View of the Cases Module

The interface allows expanding the list view to include related modules, a feature configurable through filters in **vtentx**.

Let's examine the first **Case** in the list above. You can immediately notice an arrow on the left, which allows expanding the view. This function is called the **Relationship Navigator** and is explained in **Chapter 2.6.1 Creating a Filter**.

By clicking on this arrow, you can expand the view and access more information regarding, for example, related subcases. Each **Case** has a **status** and a **due date**. The number of **closed Subcases** determines the **progress percentage**. This automation is coded and cannot be modified from the interface.

The screenshot displays the vtenext application interface. On the left is a sidebar with a 'Modules' menu where 'Cases' is selected. The main area shows a 'LIST' view of cases. A table lists four cases: CASE-4 (Vehicle license plate registration, In progress, 0.00% progress), CASE-3 (customer vehicle record, Closed, 100.00% progress), CASE-2 (Vehicle registration case management, In progress, 50.00% progress), and CASE-1 (New account creation, Open, 0.00% progress). A red arrow points to a dropdown arrow next to CASE-2, which is expanded to show a sub-table of subcases: CASE-4 (In progress) and CASE-3 (Closed). The subcases table includes columns for ACTION, CASE NO, TITLE, STATUS, TIME MANAGEMENT, ALARM DATE, and ASSIGNED TO. The progress bar for CASE-2 is shown as 50.00%.

ACTION	CASE NO	TITLE	STATUS	TIME MANAGEMENT	ALARM DATE	ASSIGNED TO
	CASE-4	Vehicle license plate registration	In progress	Not expired	26-05-2026	vtenext2604@gmail.com (Francesco Villani)
	CASE-3	customer vehicle record	Closed	Not expired	26-05-2026	vtenext2604@gmail.com (Francesco Villani)

In the example above, there are two **Subcases**, one of which is **Closed**, causing the progress bar to automatically update to **50%**. The progress bar is a **uitype 1024** field, which can only be activated and configured via code.

Case Management Processes

There are pre-installed processes that automatically manage **deadline alerts** and **status changes**, transitioning from "Due Soon" to "Expired." Let's examine them in detail:

Set Alert Date

If the **Due Date** field of a **Case/Subcase** is not filled in at the time of creation, this process sets the due date to **5 days from the current date**, assuming that the case is being created at that moment.

Settings > Process manager

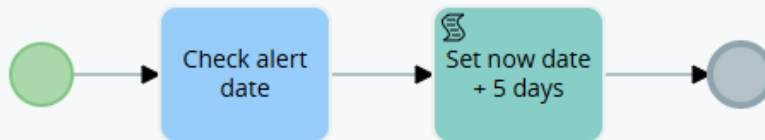
Name

Set alert date

Active

yes

Diagram

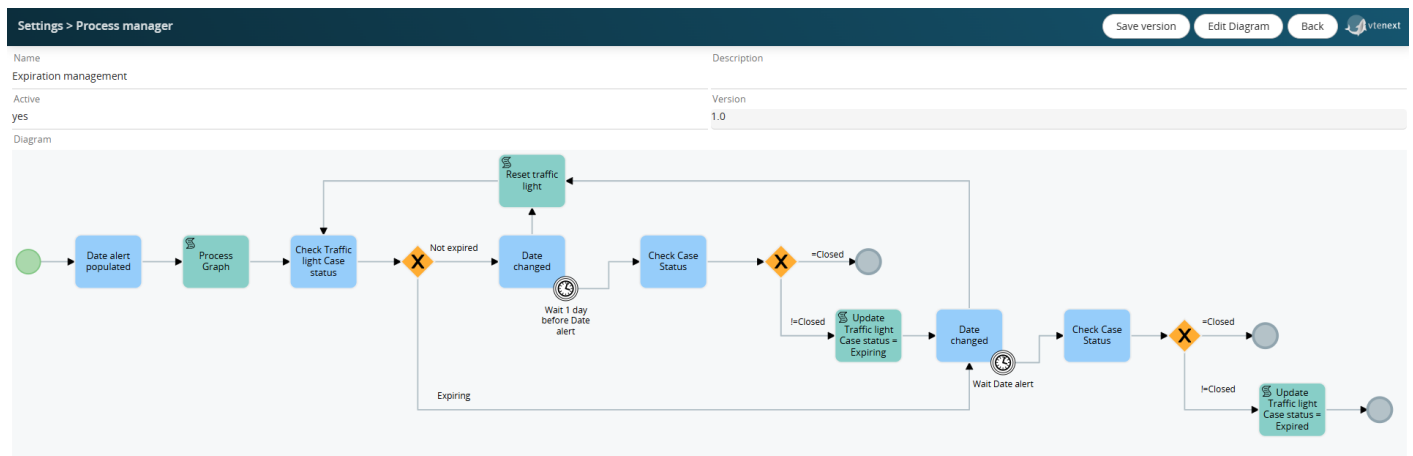


Expiration Management

This process monitors the values in the **Due Date** fields of cases/subcases. **One day before the due date**, the process automatically updates the case's status to either "**Due Soon**" or "**Expired**", depending on the status change. In summary, the case/subcase status follows this pattern:

- **Not Expired:** When the due date is still far away.
- **Due Soon:** When there is only one day left before the due date.
- **Expired:** When the due date has been reached or exceeded.

If the due date is manually changed, the status will be automatically updated based on the described parameters.



Revision #1

Created 2026-07-06 15:07:47 UTC by Admin

Updated 2026-07-06 15:07:47 UTC by Admin