

Merge Cases in Cora OpsManager

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Previous to V3.0

In Cora OpsManager, you can merge two or more related cases to one case, which is considered as the Parent case.

To merge two or more cases, follow the steps below:

1. On the task list, select the check box against the cases you want to merge. A Merge Cases option appears on the menu above the task list grid.

Team Member - Tasks List

Assigned to Me In Progress Completed

Fetch Tasks Return Tasks Close As Spam **Merge Cases**

2 selected X

<input type="checkbox"/>	Actions	ID	Priority	Target Date	Created	From	Subject
<input checked="" type="checkbox"/>	Open ...	289373	low	30/07/2019 09:45	24/07/2019 08:09	opc@pnmssoft.com	case via email
<input checked="" type="checkbox"/>	Open ...	290401	Standard	01/08/2019 15:00	28/07/2019 10:16	opc@pnmssoft.com	manual creation sanity for

2. Click Merge Cases.
3. On Merge Cases pop-up window, select the radio button for the case you want to keep as Parent Case.

Merge Cases

Select a case under which all other cases will be merged. Note: The list includes only the cases that you selected on the last viewed page.

[#289373] case via email

Case Status	Requestor Email	Received At	Input Channel
With SME	opc@pnmssoft.com	24/07/2019 08:09:16	Email
Category	Type	Sub Type	Priority
Loans	Business Loans		low

[#290401] manual creation sanity for

Case Status	Requestor Email	Received At	Input Channel
With SME	opc@pnmssoft.com	28/07/2019 10:16:44	Manual
Category	Type	Sub Type	Priority
Loans	Business Loans	Business Starter	Standard

Comments*

Merging

Merge Cases

NOTE

The Merge Case window displays only the list of cases selected on the last viewed page.

4. Add comments, and click **Merge Cases**.

A confirmation message appears.

The merged cases are closed as individual cases, and the case status changes to Rejected after merging. If any emails are sent to the merged cases, these emails are attached to the Parent case, and appear under the Conversations tab.

289373 case via email

Status	Priority	Category	Type
Rejected	low	Loans	Business Loans

Conversations | Audit Log | Attachments | Linked Cases

Merge Case
Merging 29/08/2019 12:18:41

These cases are visible on the Parent Case details page on the Linked Cases tab. The Conversations tab of Parent Case displays the conversations of all the merged cases as well.

Return Task

Status	Priority	Category	Type	Sub Type	More Details >
With SME	Standard	Loans	Business Loans	Business Starter	

Conversations | Audit Log | Attachments | **Linked Cases**

New Request | New Comment | New Email

Linked Parent Case [Link to Parent Case](#)

Case No	Category	Type	Sub Type	Created at	Actions
No records to display.					

Linked Child Case/s [Link to Child Case](#)

Case No	Category	Type	Sub Type	Created at	Actions
No records to display.					

Merged Cases

Case No	Category	Type	Sub Type	Created at	Actions
289373	Loans	Business Loans		24/07/2019 08:09:16	View Case

Return to Processor | Return to Team | On Hold

Properties

*Customer Name CustomerID
Customer Email Contact Number

Save Properties

NOTE

Cora OpsManager allows merging of maximum 20 cases at a time. All the 20 cases must be selected from the same page of the task list.

V3.0 and later

In Cora OpsManager, you can merge two or more related cases to one case, which is considered as the

Parent case.

To merge two or more cases, follow the steps below:

1. On the task list, select the check box against the cases you want to merge. A Merge Cases option appears on the menu above the task list grid.

The screenshot shows the 'My Tasks' interface. At the top, there are tabs for 'Open' and 'Completed'. Below the tabs is a menu with options: 'Fetch Tasks', 'Return Tasks', 'Close As Spam', and 'Merge Cases'. The 'Merge Cases' option is highlighted with a red box. Below the menu, there is a table with 4 items. The first two items are selected, indicated by checkmarks in the first column. The table columns are: ID, Priority, Target Date, Created, From, and Subject.

ID	Priority	Target Date	Created	From	Subject
102266	Medium	26/01/2020 08:32	22/01/2020 08:32	yael0010@gmail.com	r
102041	Medium	22/01/2020 18:00	22/01/2020 06:10	nleshem11@gmail.c...	3
96237	Medium	28/11/2019 11:27	27/11/2019 11:27	nleshem11@gmail.c...	it
74950	High	13/11/2019 22:40	19/09/2019 09:08	opc@pnmssoft.com	Bulk Upload 19

2. Click **Merge Cases**.
3. On Merge Cases pop-up window, select the radio button for the case you want to keep as Parent Case.

The screenshot shows the 'Merge Cases' pop-up window. It contains a list of two cases to be merged. The second case, '#290401] manual creation sanity for', is selected with a radio button. Below the list is a 'Comments*' field with the text 'Merging'. At the bottom, there is a 'Merge Cases' button highlighted with a red box.

Case ID	Case Status	Requestor Email	Received At	Input Channel
#289373] case via email	With SME	opc@pnmssoft.com	24/07/2019 08:09:16	Email
#290401] manual creation sanity for	With SME	opc@pnmssoft.com	28/07/2019 10:16:44	Manual

4. Add comments, and click **Merge Cases**.

A confirmation message appears.

The merged cases are closed as individual cases, and the case status changes to Rejected after merging. If any emails are sent to the merged cases, these emails are attached to the Parent case, and appear under the Conversations tab.

289373
case via email

Status: **Rejected** | Priority: low | Category: Loans | Type: Business Loans

Conversations | Audit Log | Attachments | Linked Cases

Merge Case
Merging | 29/08/2019 12:18:41

These cases are visible on the Parent Case details page on the Linked Cases tab. The Conversations tab of Parent Case displays the conversations of all the merged cases as well.

Return Task

Status: With SME | Priority: Standard | Category: Loans | Type: Business Loans | Sub Type: Business Starter | More Details >

Conversations | Audit Log | Attachments | **Linked Cases**

New Request | New Comment | New Email

Link to Parent Case

Linked Parent Case

Case No	Category	Type	Sub Type	Created at	Actions
No records to display.					

Link to Child Case

Linked Child Case/s

Case No	Category	Type	Sub Type	Created at	Actions
No records to display.					

Merged Cases

Case No	Category	Type	Sub Type	Created at	Actions
289373	Loans	Business Loans	Business Loans	24/07/2019 08:09:16	View Case

Return to Processor | Return to Team | On Hold

Properties

*Customer Name | CustomerID
Customer Email | Contact Number

Save Properties

NOTE

Cora OpsManager allows merging of maximum 20 cases at a time.