

Modify General Settings

Last Modified on 03/19/2024 5:22 am EDT

Starting with V4.0, Cora OpsManager has been renamed to Cora Case Manager.

V4.0

The pre-defined general settings are available to power users on General Settings tab under Ops Manager Admin. Settings made through this tab are in sync with the respective lookup tables on Admin console. Any changes made here are updated accordingly in the lookup tables.

To make general settings:

1. Go to **Flowtime > Ops Manager > Ops Manager Admin > General Settings**.
2. On General Settings page, make the required changes.

Case Assignment Method

In this section, select one of the three options to choose how a new case is assigned to an operator.

- All cases are available to all operators: makes the case available to all the operators in a team.
- Assign to the least busy person in the team: assigns the case to the least busy operator in the team.
- Push one by one: assigns the case one by one to all the operators.

NOTE

You may choose to hide this section from the General Settings page by making changes in PlatformConfig lookup. For details, see the [Modify PlatformConfig Lookup](#) article.

Case ID Appearance in Outgoing Emails

In this section, select the option to choose if the Case ID should appear in the outgoing email Subject line or the email body.

If you choose "Case ID will appear in the subject of the email" option then the Case ID will be displayed in the subject line of all case related emails, except for the Conversations tab on case details page where the Case ID will not appear in the email subject.


Choosing "Case ID will appear in the body of the email - hidden" adds the Case ID to email body, but keeps it hidden from the recipients.

Priority Based on Subject Line

In this section, add, edit or delete the subject line keywords based on which the priority of a Case will be set. This is applicable for all the new and existing cases created via email.

To add new subject line keyword,

1. Click **+ Add new subject word**.
2. Fill in the Sort Order and the keyword.

3. Choose the Priority from list.
4. Click  to save the record.

NOTE

For a Case, the priority based on subject-line is considered over the priority set in the Configuration Set.

To edit an existing record, click the edit icon  . Click the delete icon  to delete an existing record.

QC Stage

In this section, make QC stage settings that are applicable on a case in QC.

- QC task blocks case completion: select this check box to make QC task block the case completion.
- Case returns to Originator if QC stage fails: select this check box to return the case to the same operator (who has sent the case to QC), if QC stage fails.

Reminder Default Setting

Select **Reminder to be sent** check box to send email reminder notifications for a case by default. This setting ensures that the Reminder Required check box in the emails sent from a case is selected by default.

For more details on email reminder notifications, see [this article](#).



Pending Closure Period

This section allows you to set the number of days for which a case will stay in Pending Closure state before getting closed.


Priorities

In this section, add new and edit the existing priorities, and set importance flag for them.

To add new priority:

1. In the priorities section, click **+ Add New Priority**.
2. Add Name.
3. Click  to save changes or click  to discard changes.

Select the Highlight check box to turn on the importance flag in the grid on Flowtime, for some particular priority.

To edit an existing priority, click edit icon for the record. Make the changes, and click  .

Countries

In this section, select the **Enable country field** check box to display the Country field on Case Details page.

On selecting the check box, the list of already added countries is displayed in a grid. You may add new countries to the list using **+ Add New Country**.




Auto System Notifications Templates

This section allows you to edit the default template for CC, Reject and Reminders emails for a case.

Click edit icon against each notification to edit the template. A new window appears for you to make the changes to the template. Make the changes and click **Update**.

Auto System Notifications Templates

Edit the relevant automatic notification, when the default value should be changed

Template Name	
CC	
Reject	
Reminders	




The updates made here overrides the default templates.

Order of additional fields

In this section, drag and drop the additional fields to change their placement on the Case details page. Click **Save** to save the changes.

Order of additional Fields

Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

1.	Case Communication Email	
2.	Country	
3.	Team	

V3.3

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1. Click **+ Add new subject word**.
2. Fill in the Sort Order and the keyword.
3. Choose the Priority from list.
4. Click  to save the record.

NOTE

For a Case, the priority based on subject-line is considered over the priority set in the Configuration Set.

To edit an existing record, click the edit icon . Click the delete icon  to delete an existing record.

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2. Add Name.
3. Click to save changes or click to discard changes.

Select the Highlight check box to turn on the importance flag in the grid on Flowtime, for some particular priority.

To edit an existing priority, click edit icon for the record. Make the changes, and click .

Countries




In this section, select the **Enable country field** check box to display the Country field on Case Details page.

On selecting the check box, the list of already added countries is displayed in a grid. You may add new countries to the list using **+ Add New Country**.

Auto System Notifications Templates

This section allows you to edit the default template for CC, Reject and Reminders emails for a case.

Click edit icon against each notification to edit the template. A new window appears for you to make the changes to the template. Make the changes and click **Update**.

Auto System Notifications Templates	
Edit the relevant automatic notification, when the default value should be changed	
Template Name	
CC	
Reject	
Reminders	

The updates made here overrides the default templates.

Order of additional fields

In this section, drag and drop the additional fields to change their placement on the Case details page. Click **Save** to save the changes.

Order of additional Fields

Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

1.	Case Communication Email	☰
2.	Country	☰
3.	Team	☰

Save

V3.2

The pre-defined general settings are available to power users on General Settings tab under Ops Manager Admin. Settings made through this tab are in sync with the respective lookup tables on Admin console. Any changes made here are updated accordingly in the lookup tables.

To make general settings:

1. Go to Flowtime > Ops Manager > Ops Manager Admin > General Settings.

General Settings

Case Assignment Method
Select how cases are assigned to operators.

All cases are available to all operators
 Assign to the least busy person in the team
 Push one by one

Case ID Appearance in Outgoing Emails

Case ID will appear in the subject of the email
 Case ID will appear in the body of the email- hidden

Priority Based on Subject Line
Add, Edit or Delete subject line keywords, based on which priority will be set for cases created via email only.

Sort Order	Word	Priority		
1	urgent	High		
2	something	Low		
3	important	Standard		

Page size: 5 | 3 items in 1 pages

QC Stage

QC task blocks case completion
 Case returns to Originator if QC stage fails

Pending Closure Period
Set the number of days a case stays in "Pending Closure" status before it is closed by the system.

0 days

Priorities
Click the Edit button to set up a priority level. Select the Highlight checkbox to turn on the importance flag when a case is tagged with the respective priority level.

Name	Highlight		
High	<input checked="" type="checkbox"/>		
Low	<input type="checkbox"/>		
Medium	<input type="checkbox"/>		
Standard	<input type="checkbox"/>		

Page size: 5 | 4 items in 1 pages

Countries

Enable country field

Order of Additional Fields
Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

- Case Communication Email
- Team

Save

2. On General Settings page, make the required changes.

Case Assignment Method

In this section, select one of the three options to choose how a new case is assigned to an operator.

- All cases are available to all operators: makes the case available to all the operators in a team.
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Priority Based on Subject Line

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To add new subject line keyword,

1. Click **+ Add new subject word**.
2. Fill in the Sort Order and the keyword.
3. Choose the Priority from list.
4. Click  to save the record.

NOTE

For a Case, the priority based on subject-line is considered over the priority set in the Configuration Set.

To edit an existing record, click the edit icon . Click the delete icon  to delete an existing record.

QC Stage

In this section, make QC stage settings that are applicable on a case in QC.

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Pending Closure Period



This section allows you to set the number of days for which a case will stay in Pending Closure state before getting closed.

Priorities


In this section, add new and edit the existing priorities, and set importance flag for them.

To add new priority:

1. In the priorities section, click **+ Add New Priority**.
2. Add Name.

3. Click  to save changes or click  to discard changes.

Select the Highlight check box to turn on the importance flag in the grid on Flowtime, for some particular priority.

To edit an existing priority, click edit icon for the record. Make the changes, and click .

Countries

In this section, select the **Enable country field** check box to display the Country field on Case Details page.




On selecting the check box, the list of already added countries is displayed in a grid. You may add new countries to the list using **+ Add New Country**.

Order of additional fields

In this section, drag and drop the additional fields to change their placement on the Case details page. Click **Save** to save the changes.

Order of additional Fields

Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

1.	Case Communication Email	
2.	Country	
3.	Team	

V3.0

In Cora OpsManager, the out-of-the-box (OOTB) general settings are available to power users on General Settings tab under Ops Manager Admin. Settings made through this tab are in sync with the respective lookup tables on Admin console. Any changes made here are updated accordingly in the lookup tables.

To make general settings:

1. Go to **Flowtime > Ops Manager > Ops Manager Admin > General Settings**.

OPS MANAGER ADMIN SS

General Settings

- OPS MANAGER ADMIN
- General Settings**
- Label Settings
- Target Date Calculatio...
- Categories
- Types
- Sub Types
- Category-Role Associa...
- Configuration Sets**
- Email Templates
- Manage User Groups
- Conditional Formatting
- Reports
- Mailbox

Case Assignment Method

Select how cases are assigned to operators.

All cases are available to all operators
 Assign to the least busy person in the team
 Push one by one

Priority Based On Subject Line

Add, Edit or Delete subject line keywords, based on which priority will be set for cases created via email only.

+ Add new subject word Refresh

Sort Order	Word	Priority		
1	Important	High	🗑️	✎️
2	something	Low	🗑️	✎️
3	urgent	extremely urgent	🗑️	✎️

Page size: 5 3 items in 1 pages

QC Stage

QC task blocks case completion
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Pending Closure Period

Set the number of days a case stays in "Pending Closure" status before it is closed by the system.

0 days

Priorities

Click the Edit button to set up a priority level. Select the Highlight checkbox to turn on the importance flag when a case is tagged with the respective priority level.

+ Add New Priority Refresh

Name	Highlight		
extremely urgent	<input checked="" type="checkbox"/>	🗑️	✎️
High	<input checked="" type="checkbox"/>	🗑️	✎️
Low	<input type="checkbox"/>	🗑️	✎️
Medium	<input type="checkbox"/>	🗑️	✎️
Standard	<input type="checkbox"/>	🗑️	✎️

Page size: 5 6 items in 2 pages

Countries

Enable country field
 Set the list of countries.

+ Add New Country Refresh

Name		
France	🗑️	✎️
India	🗑️	✎️
Israel	🗑️	✎️
Mexico	🗑️	✎️
Spain	🗑️	✎️

Page size: 5 6 items in 2 pages

Order of additional Fields

Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

- Case Communication Email
- Country
- Team

Save

2. On General Settings page, make the required changes.

Case Assignment Method

In this section, select one of the three options to choose how a new case is assigned to an operator.

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Priority Based on Subject Line

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To add new subject line keyword,

1. Click **+ Add new subject word**.
2. Fill in the Sort Order and the keyword.
3. Choose the Priority from list.
4. Click  to save the record.

NOTE

For a Case, the priority set based on the subject-line is considered over the priority set in the Configuration Set.

To edit an existing record, click the edit icon . Click the delete icon  to delete an existing record.

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To add new priority:

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3. Click to save changes or click to discard changes.

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To edit an existing priority, click edit icon for the record. Make the changes, and click .

Countries

In this section, select the **Enable country field** check box to display the Country field on Case Details page.

On selecting the check box, the list of already added countries is displayed in a grid. You may add new countries to the list using **+ Add New Country**.

Order of additional fields

In this section, drag and drop the additional fields to change their placement on the Case details page. Click **Save** to save the changes.

Order of additional Fields

Drag and drop fields to change their location on the Case Page then Click Save to save your changes.

1.	Case Communication Email	<input type="checkbox"/>
2.	Country	<input type="checkbox"/>
3.	Team	<input type="checkbox"/>

Previous to V3.0

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To make general settings:

1. Go to **Flowtime > Ops Manager Admin > General Settings**.

General Settings | Label Settings | Categories | Types | Sub Types | Configuration Sets | Email Templates | Manage User Groups | Conditional Formatting | Reports | Mailbox

Case Assignment Method
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days

Case Details

Priorities
Click the Edit button to set up a priority level. Select the Highlight checkbox to turn on the importance flag when a case is tagged with the respective priority level.

Name	Highlight		
<input type="text" value=""/>			
Extremely Urgent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
low	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page size: 5 4 items in 1 pages

Countries

Enable country field
Set the list of countries.

Name		
<input type="text" value=""/>		
India	<input type="checkbox"/>	<input type="checkbox"/>
Israel	<input type="checkbox"/>	<input type="checkbox"/>
Italy	<input type="checkbox"/>	<input type="checkbox"/>
Russian Federation	<input type="checkbox"/>	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>

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2. On General Settings page, make the required changes.

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To add new subject line keyword,

1. Click **+ Add new subject word**.
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NOTE

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