DigitalCase online help

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Introduction

Sidetrade becomes the first Artificial Intelligence platform to cover the entire customer cycle and now targets Customer Service departments. Do you know that 29% of dissatisfied customers intend to stay with the company, and 50% use a company more frequently after a positive customer experience?

You receive a lot of Customers enquiries per day for different purposes? And It takes a lot of time to identify Customer and Case topic among all these inquiries to qualify time-to-resolution properly?

Your clients deserve the best in terms of responsiveness and follow up to their enquiries.

Today, Sidetrade adds to their software suite, a solution dedicated to improving customer relationships.

DigitalCase is a collaborative customer service ticket management solution aiming to accelerate the resolution of disputes and claims via Artificial Intelligence.

Deep Learning's algorithms make it possible to identify and to qualify the customer's e-mails to automatically assign the requests to the Support Agent in charge of the account. Service engagement levels are calculated based on the nature of the ticket to process. DigitalCase makes your customer service more efficient and ensure customer satisfaction.

DigitalCase addresses all your support need. Primary designed for collection issue, DigitalCase can also address any other Customer Care issue through a single one-stop-shop solution

Presentation

About DigitalCase

Digital Case, powered by Aimie, Sidetrade Artificial Intelligence virtual assistant, automates Customer case management and speeds up disputes and claims resolution.

This module simplifies, prioritises and reduces processing times for customer requests.

Its strengths are as follows:

- Case management collaborative solution (e-ticketing)
- Fully integrated mailbox into Sidetrade Financials
- Dispute management optimisation thanks to internal and external messages
- SLA (*Service-Level Agreements*) management based on the DigitalCases category (resolution times)

DigitalCase is involved in the 4 key stages in the processing of a customer request, to provide a solution to each potential risk.

Thanks to Aimie, Sidetrade's Artificial Intelligence virtual assistant, the incoming customer emails are identified and classified in order to automatically assign them to the relevant agent, with automatic classification of the types of requests received. The service level agreements are calculated automatically based on the nature of the customer requests to be processed.

This new module is also aimed at Customer Service teams through a unique collaborative area, shared with the Financial Department, for resolving customer inquiries. The Customer Service teams can therefore be reactive, focusing on their area of expertise for optimum customer satisfaction.

> Note
> DigitalCase is a module of the Sidetrade Financials suite and cannot therefore be sold separately from Sidetrade Financials.

Objectives & benefits

Objectives	Benefits
Improve the customer experience across the entire Sales-to-Cash cycle Share and consolidate all relevant information and exchanges to ensure appropriate, personalised and effective communication with customers	Efficient Customer Service Archiving and follow-up in the resolution of each customer case Better understanding of disputes and the importance of customer retention
Avoid manual tasks By using Artificial Intelligence in the recognition of emails, customer requests are automatically assigned to the agent in charge of the Customer Account	Gain in productivity in the management of customer exchanges, since requests are already classified Customer Service teams are released from repetitive, time-consuming tasks with no added value

Resolve DigitalCases within the allocated time With the management of SLAs integrated into the configuration of the resolution time, agents can monitor and receive alerts based on the resolution time of each DigitalCase	Improved process for the processing and resolution of customer requests Optimisation of resource allocation and respect of SLAs
Reporting	Control of the Customer Service performance

Requirements

1) DigitalCase requirements

To implement DigitalCase, it is required to:

- Have access to Sidetrade Financials platform
- Set up generic email addresse(s) that will be routed to DigitalCase or create new ones and communicate them to your Customers
- Set up forwarding rules from your generic email addresse(s) in order to route all the incoming emails to DigitalCase

For more details about DigitalCase settings, please refer to the **Settings** section.

2) Machine Learning algorithm requirements

In order to develop a matching algorithm that will handle automatically Customer and Category identification, Aimie, Sidetrade Artificial Intelligence virtual assistant, needs to get as much email data as possible to “learn” the matching rules between those emails and the Customer ID / Category they were rightly matched with at the time.

The larger the email archives (several years of email history for instance), the more chance we stand to develop statistically significant matching rules and safer automated processes.

Example: Email archives need to contain email headers and message content with their corresponding Customer ID:

Email subject	**Email content**	**Corresponding Customer ID**
Incomplete shipments on last delivery	Hello, We have received invoice 38001293/billing doc 11250098 but this is not in line with the received goods. we are missing a few: Line item 1051593: 220 items invoiced,	Account 123456

	only 110 items received. Could you please check this, confirm it, and send the missing goods as soon as possible. On behalf of XYZ – Account 123456 Roberta Harvey - Accounts Payable	
The price on your last invoice is incorrect	Hello team, The price is incorrect on the following item: - Material80004545: 48items invoiced, only 16 items received; Invoiced@ 4,89 - should be invoiced @ 4,24 On behalf of XYZ – Account 789010 Ricky Show - Accounts Payable	Account 789010

Example: Email archives need to contain email headers and message content with their corresponding case Category & sub-category

Email subject	**Email content**	**Corresponding Category & sub-category**
Incomplete shipments on last delivery	Hello, We have received invoice 38001293/billing doc 11250098 but this is not in line with the received goods. we are missing a few: Line item 1051593: 220 items invoiced, only 110 items received. Could you please check this, confirm it, and send the missing goods as soon as possible. On behalf of XYZ – Account 123456 Roberta Harvey - Accounts Payable	Delivery / Incomplete Delivery
The price on your last invoice is incorrect	Hello team, The price is incorrect on the following item: - Material80004545: 48items invoiced, only 16 items received; Invoiced@ 4,89 - should be invoiced @ 4,24 On behalf of XYZ – Account 789010 Ricky Show - Accounts Payable	Collection / Invoice issue

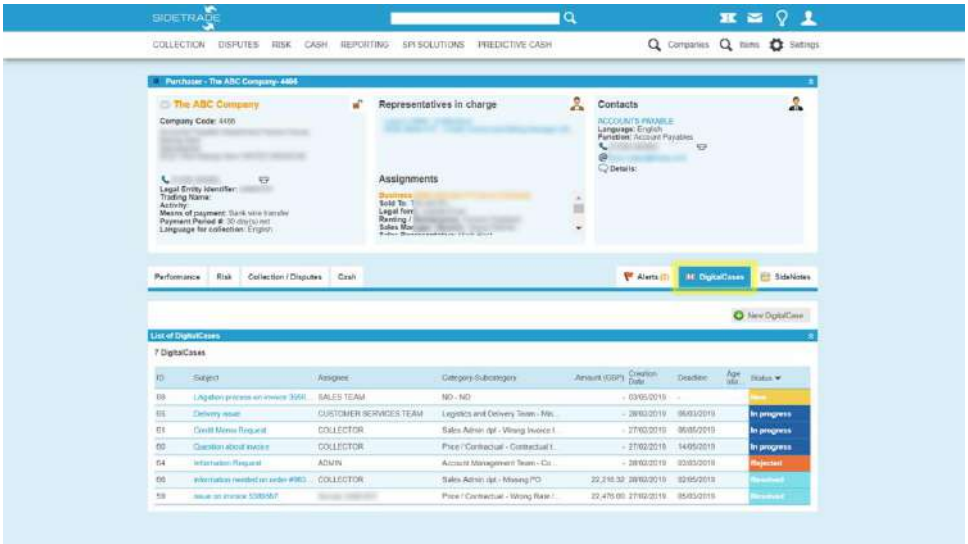
NB: Performance being driven by volume and data quality, Sidetrade can't commit on email automation rate.

If you do not have a history of labelled emails, you can still use DigitalCase. Incoming emails are recognised through the sender's email address and users can also perform identification manually, which can then constitute a learning base once sufficient data has been gathered to produce an algorithm.

DigitalCase in Sidetrade Financials

In the main header > **DigitalCase** icon

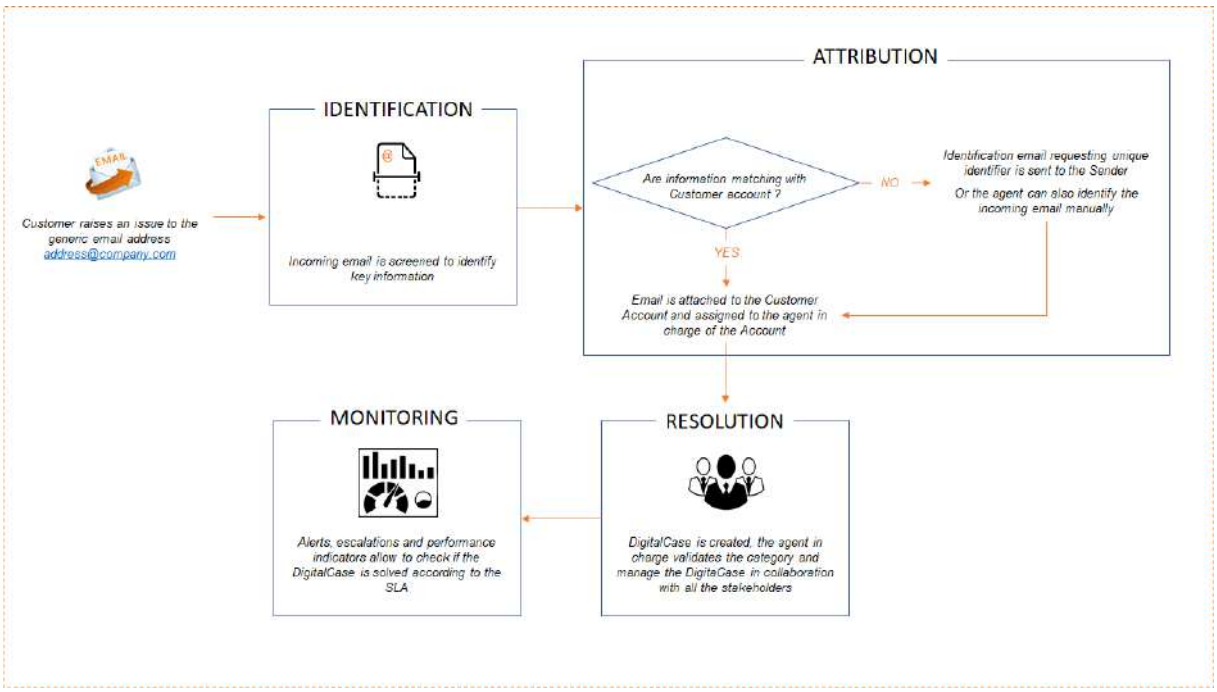
In the Customer Account > **DigitalCases** tab



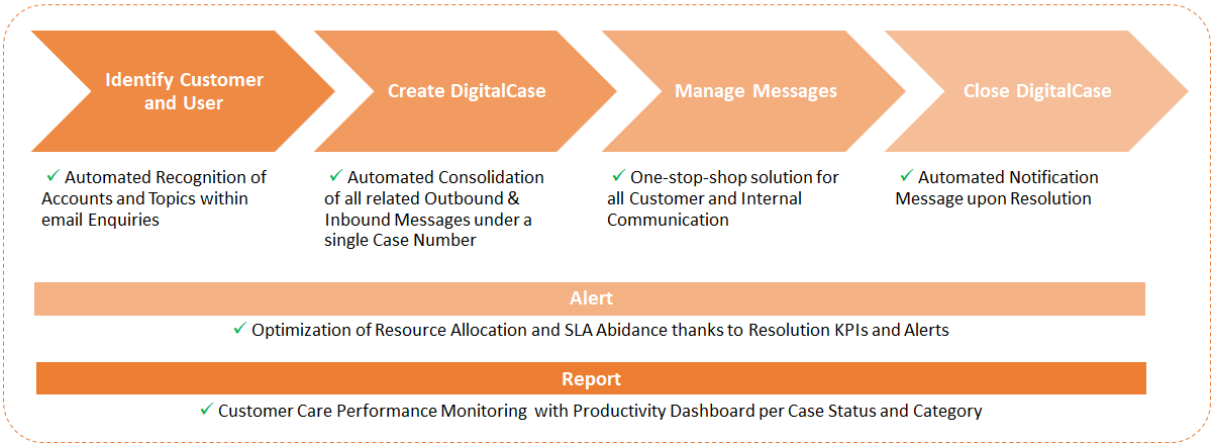
Administration menu > **DigitalCase** menu

Global flowchart

Taking the 4 key stages seen previously:



Features



Automate incoming emails allocation

Incoming customer emails are systematically analysed by a predictive algorithm based on Aimie's Artificial Intelligence. Each request is then automatically assigned to the agent in charge of the Customer Account.

Each action carried out by the agent increases Aimie's knowledge, allowing her to constantly improve in order to be increasingly accurate over time (Machine Learning).

Key information used in the identification of an incoming email.

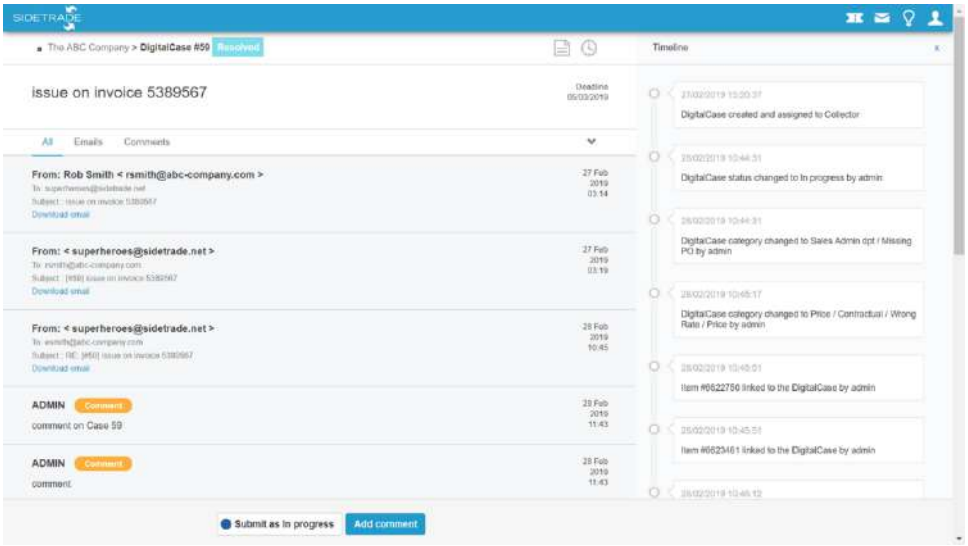
- Sender's email address
- Customer Account ID
- Invoice ID
- Subject and email body

> **Note**
> Aimie model may be trained based on historical records provided by Customer.
> For more details, please refer to the "Machine Learning algorithm requirements" section.

Streamline every exchange in a single point

DigitalCase automatically redirects, consolidates and traces all emails, both incoming and outgoing, connected to the same Customer Account. A unique and dedicated ticket number is allocated to each DigitalCase.

Agents are therefore instantly made aware of the context and the exchanges related to the customer case. At a glance, agents can access the history of exchanges and actions on the DigitalCase to work effectively towards its resolution.



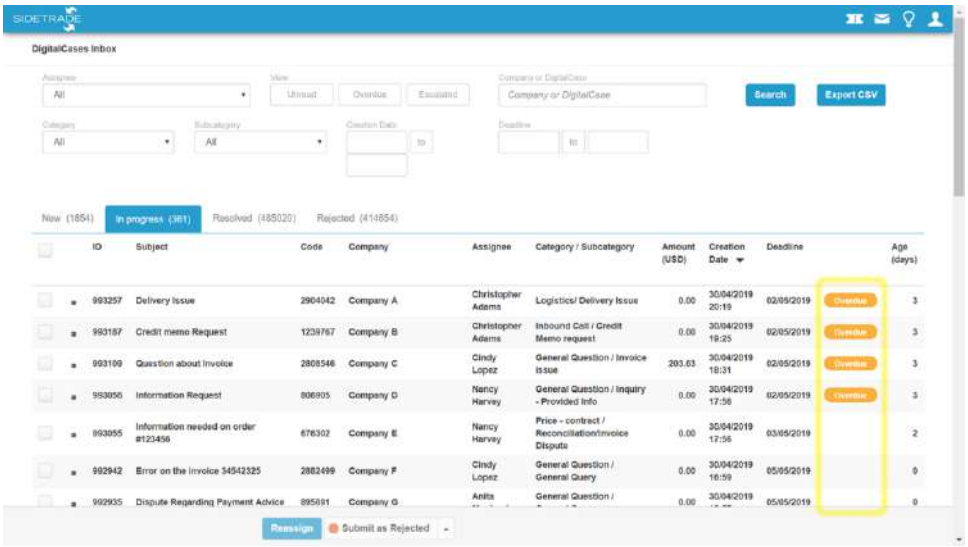
Track SLA abidance

DigitalCase sends notifications to assignees based on the resolution time during the resolution process:

- **Resolution KPI**: the deadline for resolution of the DigitalCase is configured based on the category / sub-category selected

- **Alerts**:
    - Email notification to the agent if the DigitalCase is X days overdue
    - Email notification to the manager if the DigitalCase is X days overdue

The SLAs are respected and the daily activities of the agents are simplified.



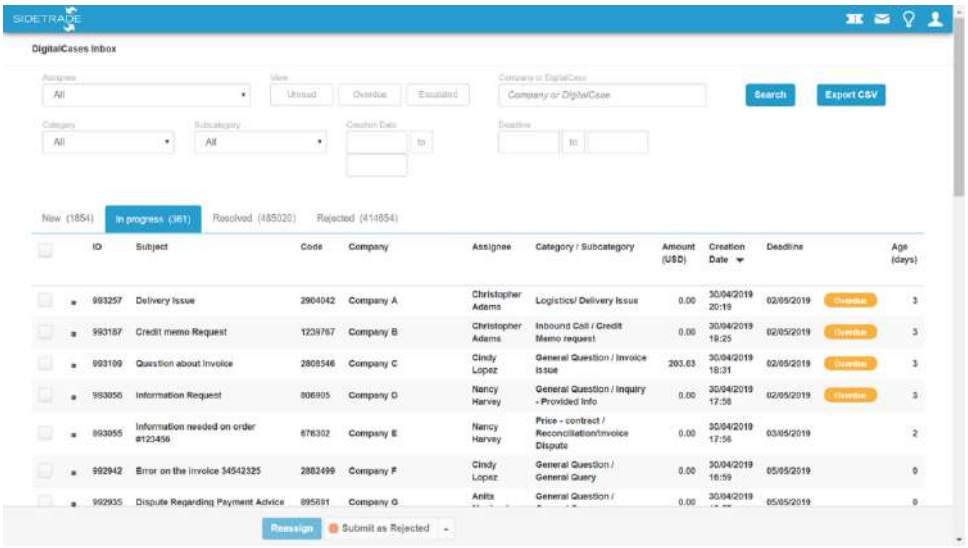
Monitor resolution KPI

The progress of the DigitalCases can be monitored based on their status and their category from a dashboard. You can therefore check your customer service performance.

Main screens

DigitalCase Inbox

Access	**Main header > icon > Inbox**



Each user accesses the list of DigitalCases assigned to him/her.

The  icon is used to notify the user when a new case is created (**New** tab) or when an email is sent on an open DigitalCase. Users can also view all unread DigitalCases using the **Unread** filter. All of these DigitalCases will appear in bold.

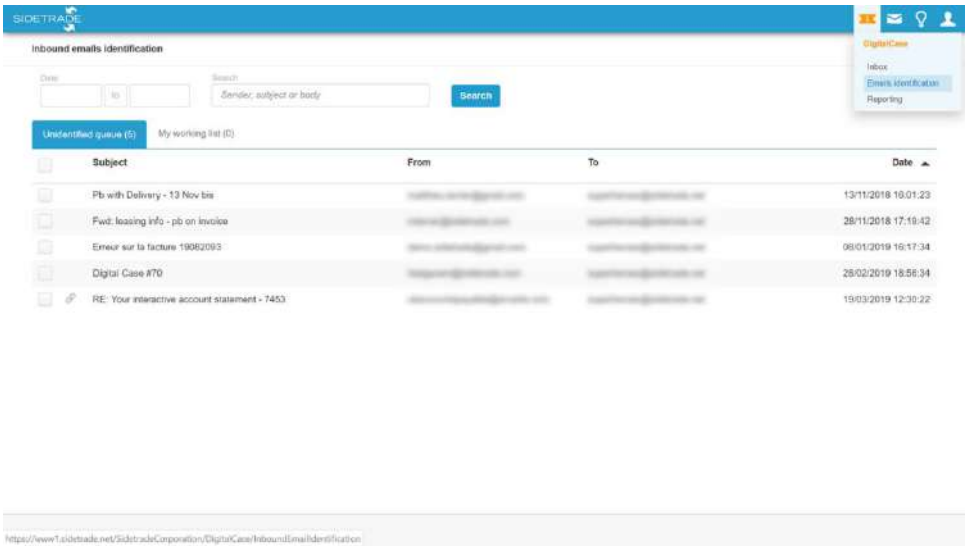
Other filters exist in the DigitalCase inbox:

- Assignee: for a manager, in order to display the DigitalCases assigned to a specific agent
- Overdue: when the resolution date has passed
- Escalated: when the case has been escalated to the manager since it could not be resolved within the allocated time
- Category / sub-category
- Creation date
- Deadline

Incoming email identification

Access	**Main header >  icon > Emails identification**

Incoming emails which have not been assigned to any Customer Account are listed in this screen, until a user assigns them manually to a Customer Account.



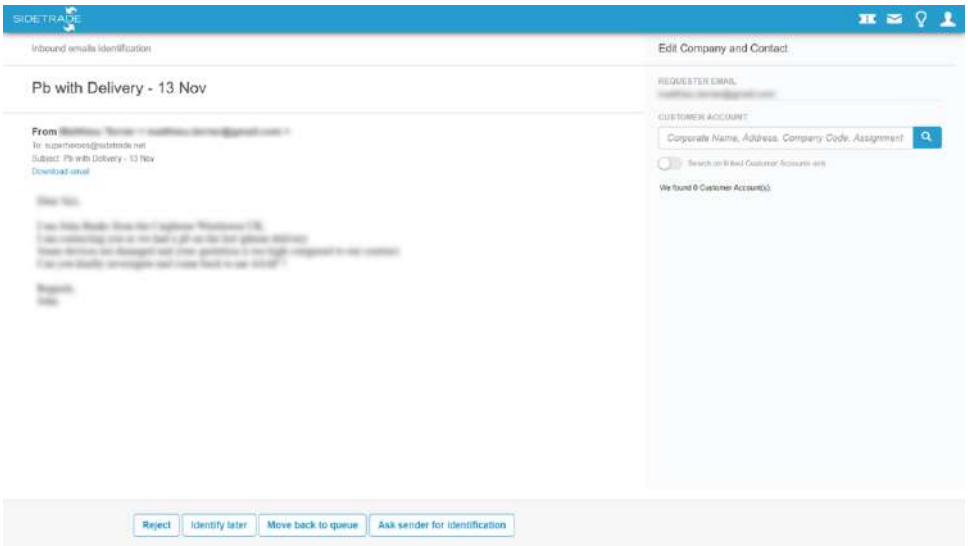
Incoming emails are distributed into 2 tabs:

- **Unidentified queue** tab: overall list of emails for all users.
- **My working list** tab: user's personal list. Emails on this list are no longer accessible to other users.

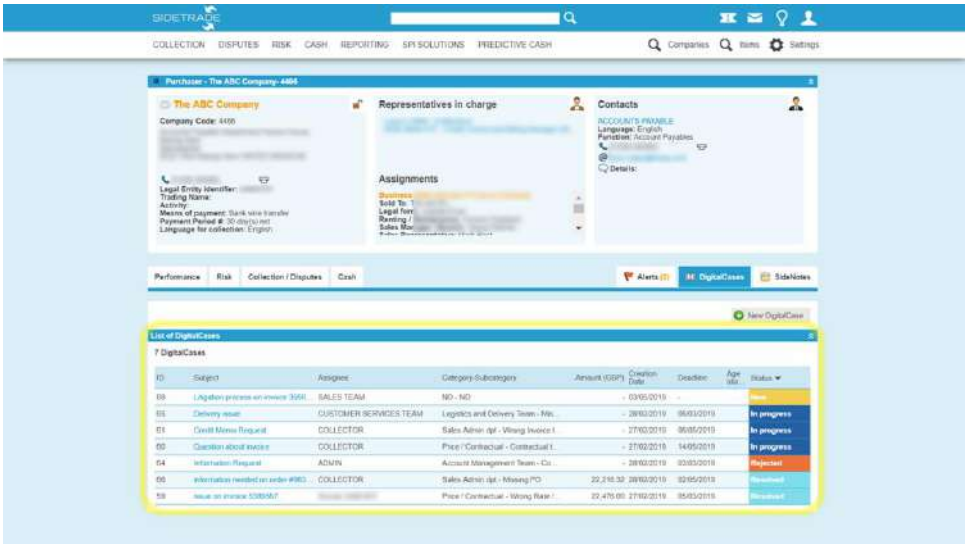
> **Notes**
> - A maximum of 30 emails per page can be displayed.
> - The emails can be sorted using any column. The sorting will be saved for the user, even after changing page or after they have logged out of Sidetrade Financials.

When a user clicks on an email, they switch to the content of the email. They then have several options:

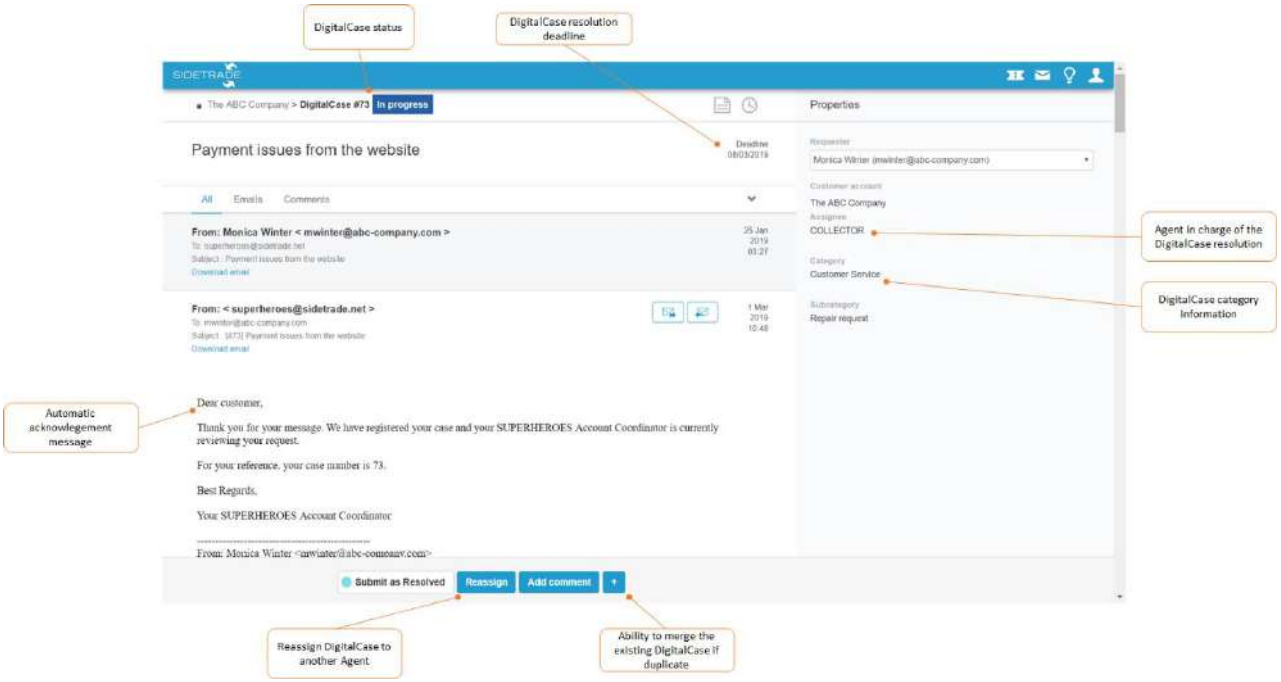
- **Select a company to which to assign the email**: a new DigitalCase will be created from this email; the email will be removed from the inbound emails identification list and a new DigitalCase appears in the inbox
- **Ask sender for identification**: it manually triggers the sending of an identification request email to the sender
- **Move back to queue**: the email will again be moved from the **My working list** tab to the **Unidentified queue** tab
- **Identify later**: the email is moved to the email list of the **My working list** tab
- **Reject**: the email is rejected and is removed after confirming its deletion

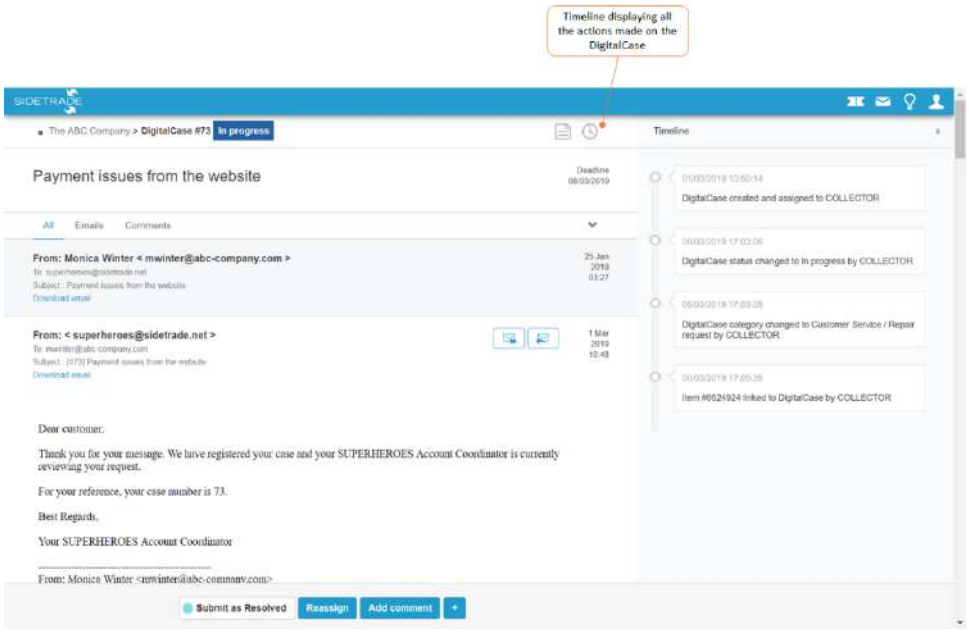


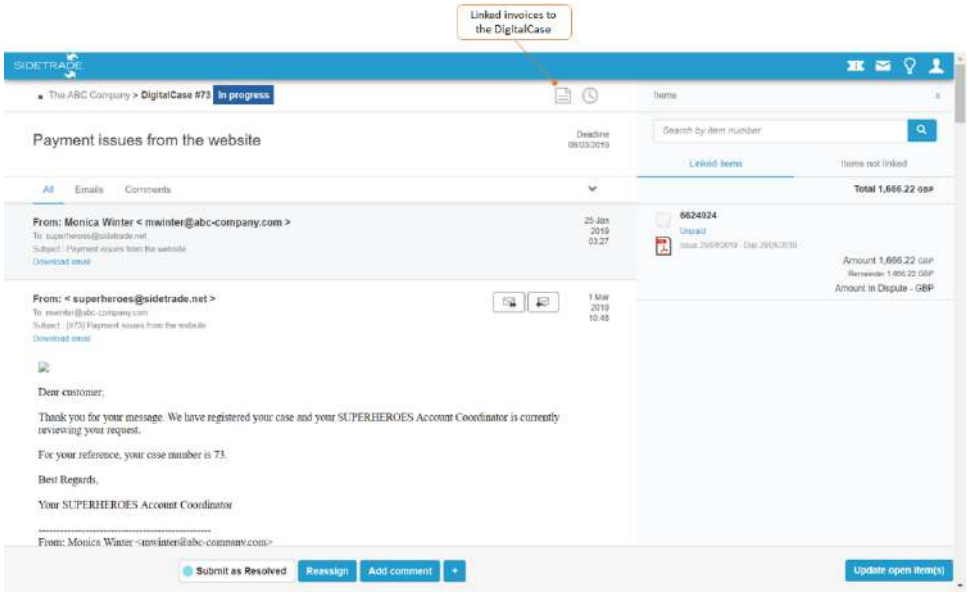
Customer Account



DigitalCase details







Reporting

The DigitalCase reporting provides you with an overview of your performance.

It consists of 4 indicators and 2 graphs:

Description of the indicators:

Resolved amount	Total amount of all invoices linked to resolved DigitalCases
Average validation time (days)	Average number of days between the creation of a **New** DigitalCase and its change to the **In progress** status across all DigitalCases This indicator is used to find out the time passed between the arrival of a **New** DigitalCase and its handling by the assignee.
In Progress DigitalCases: average age (days)	Average number of days between the date on which the DigitalCase passed to the **In progress** status and the current date across all DigitalCases **In progress**

Resolved DigitalCases: average resolution time (days)	Average number of days between the date on which the DigitalCase passed to the **In progress** status and the date on which the DigitalCase was **Resolved** across all resolved DigitalCases

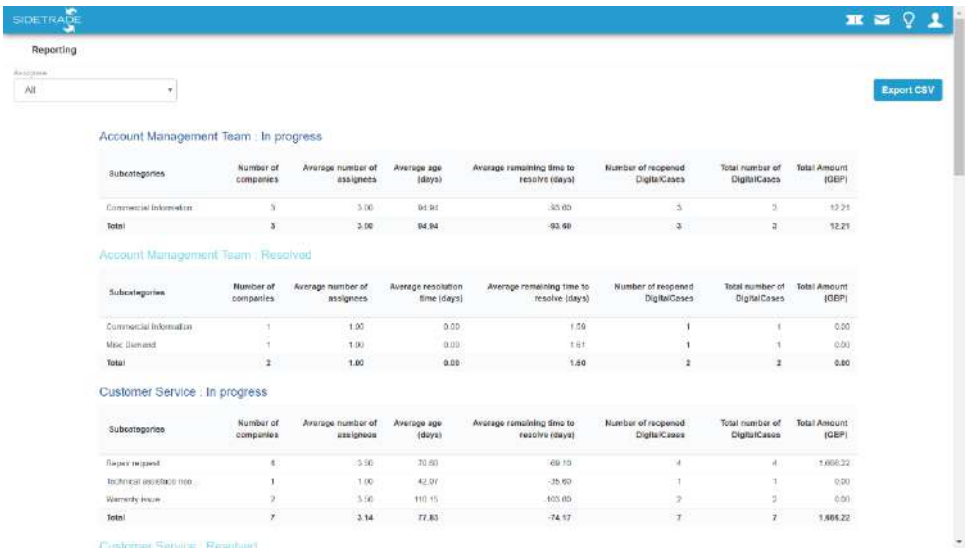
Description of the graphs

DigitalCases by status	This graph shows the number of DigitalCases for each status: **New**, **In progress**, **Resolved, Rejected**
Time tracking and DigitalCases by category	This graph shows the number of DigitalCases **In progress** and **Resolved** for each category

Managers can view the performances of a member of their team using the **Assignee** filter.

To display further details, click **View more**.

A detailed dashboard of the DigitalCases for each category is displayed.



Lastly, the **Export** button is used to export all data.

DigitalCase Lifecycle

DigitalCase status description

New	A DigitalCase takes the **New** status since the incoming email can be identified, attached to a Customer Account and assigned to the cash collector of the Customer Account.
In Progress	A DigitalCase acquires the **In progress** status once the assignee validates the assignment of the DigitalCase on the Customer Account and chooses/confirms the DigitalCase category. It is once the DigitalCase takes the **In progress** status that the resolution deadline is displayed based on the DigitalCase category.
Resolved	A DigitalCase passes to the "Resolved" status once the assignee considers that the DigitalCase has been processed and decides to close it manually, having chosen a resolution status. The resolution statuses can be configured and customised in the Administration settings.
Rejected	A DigitalCase can be **Rejected** if the assignee considers that the DigitalCase cannot be processed in its current state because: • The DigitalCase has been attached to the incorrect Customer Account • The DigitalCase is a duplicate of an existing DigitalCase • The DigitalCase is in fact SPAM • The DigitalCase is not to be processed since it is a customer request outside of the DigitalCase scope

SLA and DigitalCase age

DigitalCase creation date	The creation date of a DigitalCase corresponds to the date on which the incoming email was identified and attached to a Customer Account, in other words when the DigitalCase takes the **New** status
DigitalCase resolution deadline	The resolution deadline for a DigitalCase is defined based on the category of the DigitalCase. The resolution time is established once the DigitalCase takes the **In progress** status. Find out more about the configuration of the categories and the resolution times

DigitalCase age	The age of the DigitalCase is the difference between the date on which the DigitalCase passed to the **In progress** status and the current date Age of an "In progress" DigitalCase = [Current date] – [Date of the **In progress** status] Note: a DigitalCase with the **New** status will not have an indicator of its age. The age of the DigitalCase will start to be counted once it reaches the **In progress** status.

Example: An email is received in DigitalCase on 23/04/2019. The email is correctly identified on the correct Customer Account and assigned to the correct cash collector. The creation date of the DigitalCase is therefore 23/04/2019.

The assignee becomes aware of this **New** DigitalCase and passes it to the **In progress** status on 24/04/2019, with a category requiring resolution within 2 days. The deadline for resolution will therefore be 26/04/2019.

It is now 29/04/2019, and the DigitalCase could not be resolved within the allocated time.

The age of the DigitalCase is 5 days (time between 24/04/2019 and 29/04/2019)

Automatic messages sent to the Customer

Acknowledgement message	To confirm the handling and processing of a case, an acknowledgement message is sent automatically to the customer's email address. Note: No acknowledgement message will be sent to the customer's email address if the sender's email address contains the internal domain name of the company
Ping identification email to the Sender	If the incoming email is not identified on a Customer Account, an identification request email is sent automatically to the sender. Note: It is possible not to enable this feature > Refer to the **Settings** section

Key stages

Create a new DigitalCase

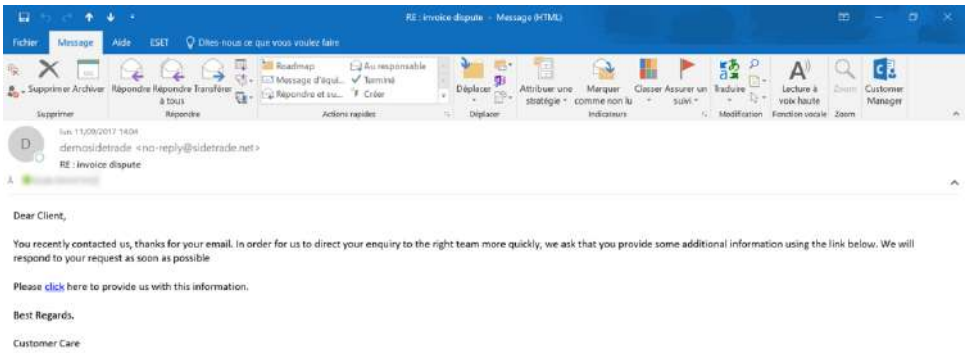
1) By receipt of a customer email

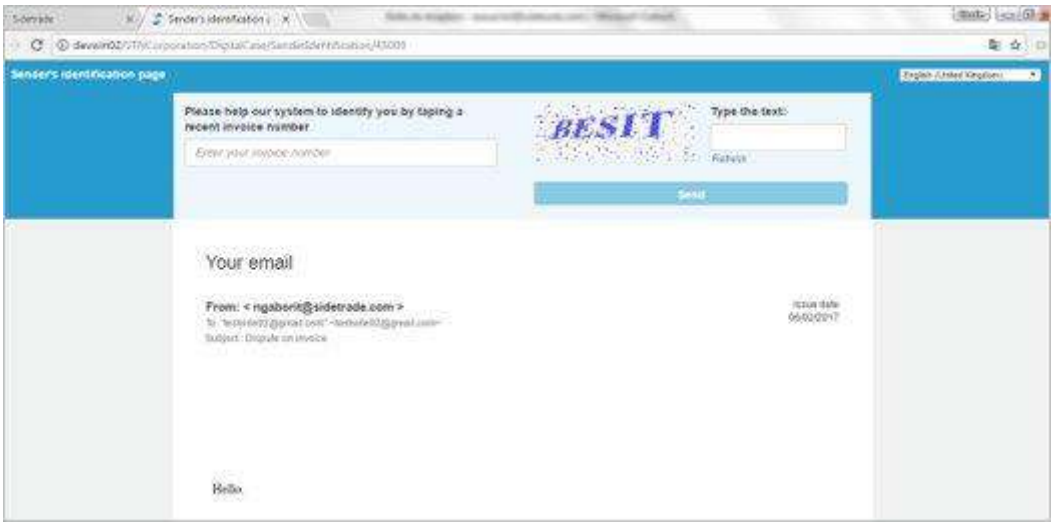
On receipt of an incoming email, a **New** DigitalCase is automatically created once it is identified on a Customer Account.

2) By identification by the customer themselves

On receipt of an unidentified incoming email, the sender will automatically receive an email asking them to identify themselves with an invoice number (open or closed).

💡 Note: it is possible to personalise the content of the message or not to enable the sending of this automatic message > Find out more

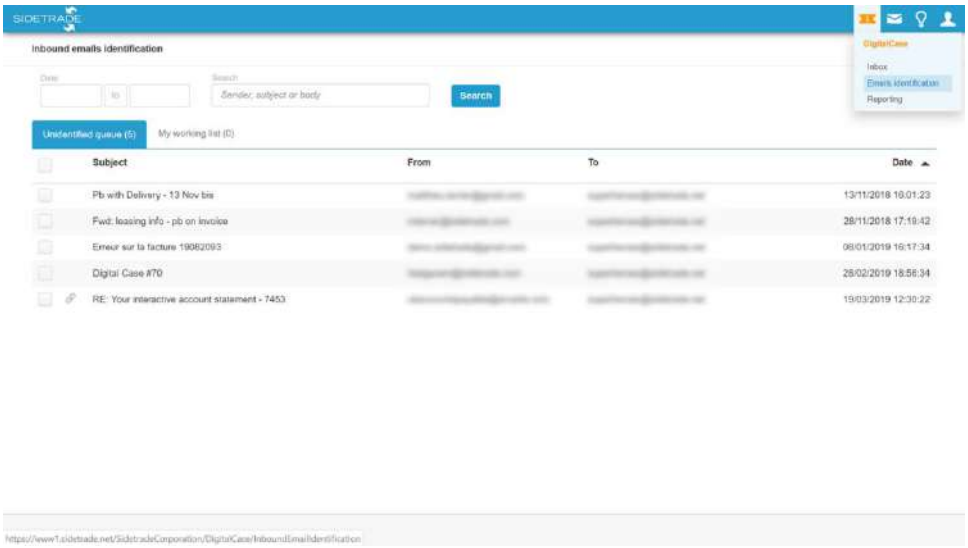




Once the sender has entered and validated the invoice number, the email will automatically be identified, a **New** DigitalCase will be created on the Customer Account corresponding to the invoice number, and the sender's contact information will be added to the Contacts of the Customer Account.

NB: If an incoming email is sent from an email address with an internal domain name, no new contact will be created in the Customer Account.

If the sender does not respond to the identification request email, the incoming email will be placed in the inbound emails identification list.



3) Manually by the user

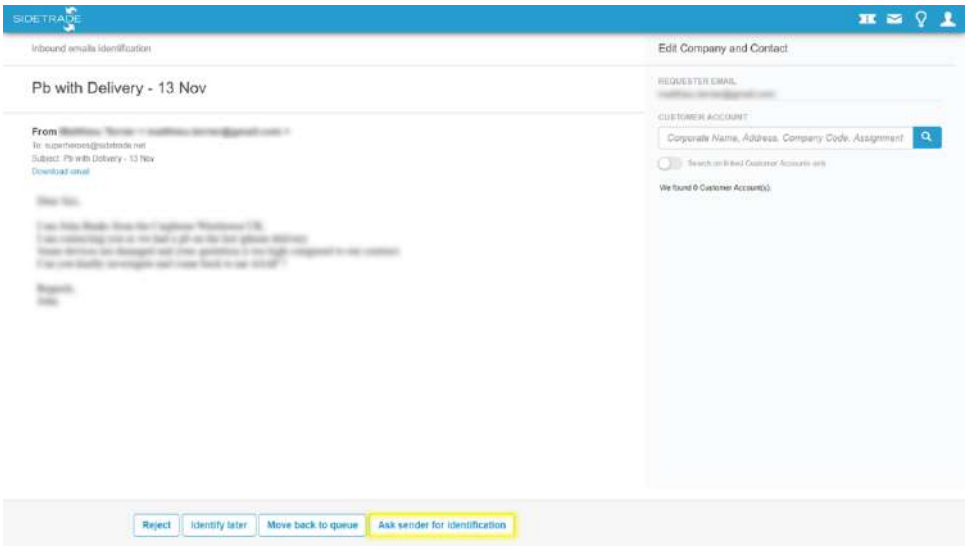
A DigitalCase may be created manually in the following cases:

- *The email has not been identified automatically and/or the sender has not responded to the identification request email*

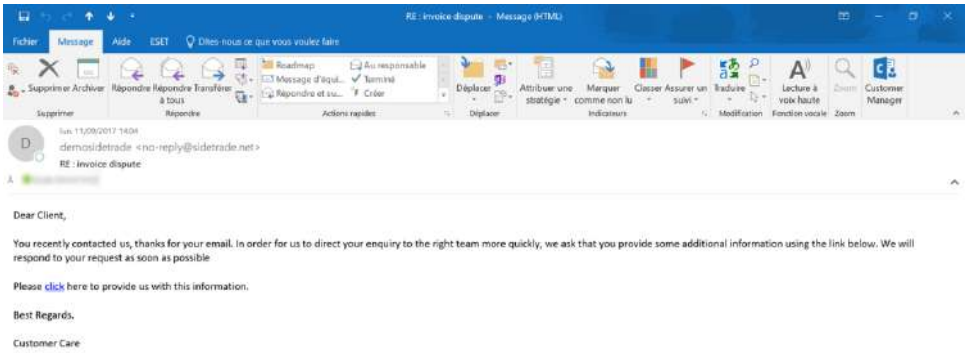
Users can find all unidentified emails in the inbound emails identification list (all users have access to this list). To identify an email, the user can choose to:

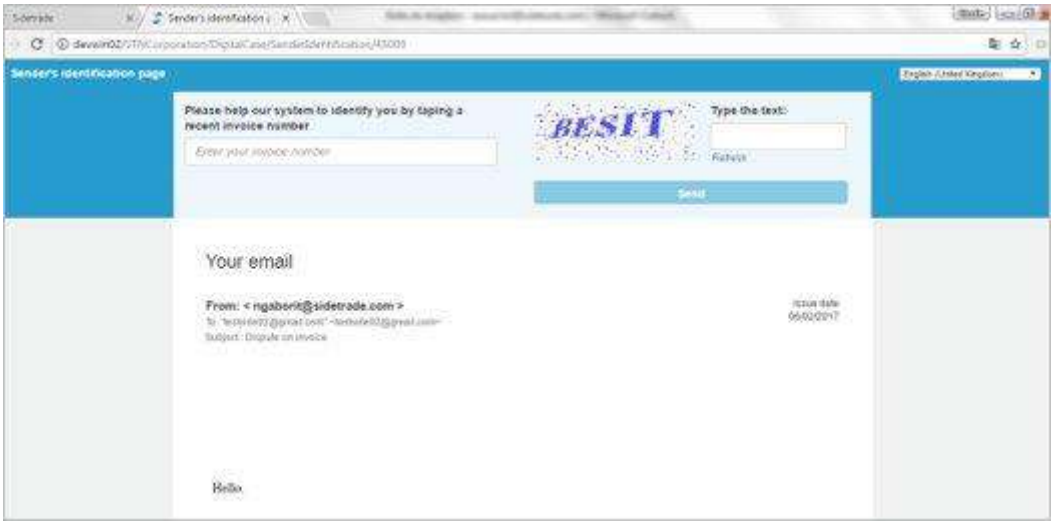
- Ask the sender to identify themselves

By clicking the **Ask sender for identification** button, the user manually triggers the sending of an identification request email to the sender



The sender will receive an email asking them to identify themselves with an invoice number (open or closed).



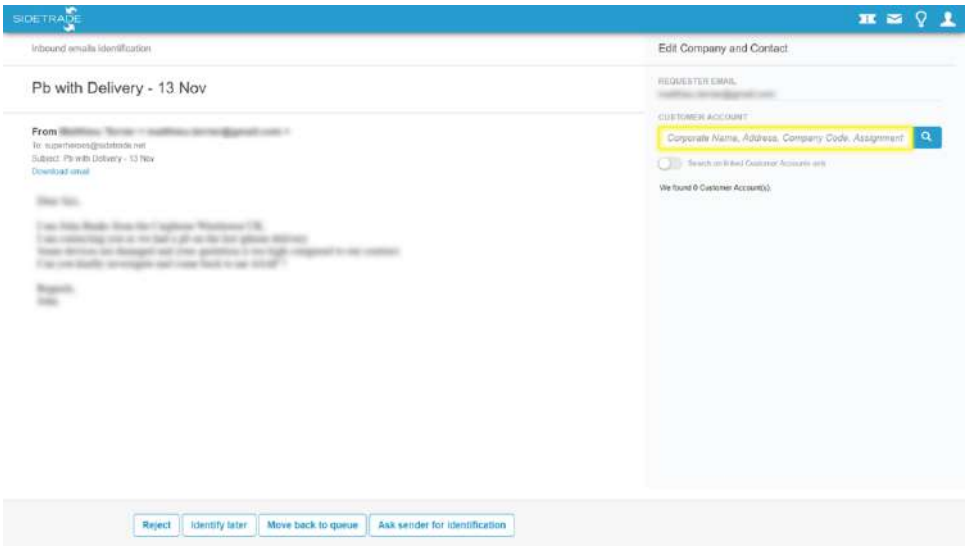


Once the sender has entered and validated the invoice number, the email will automatically be identified, a **New** DigitalCase will be created on the Customer Account corresponding to the invoice number, and the sender's contact information will be added to the Contacts of the customer Account.

NB: If an incoming email is sent from an email address with an internal domain name, no new contact will be created in the customer Account.

- Attach the incoming email manually to a Customer Account

To identify the incoming email, the user has the possibility of using a search engine to find the correct Customer Account to which the email should be attached.



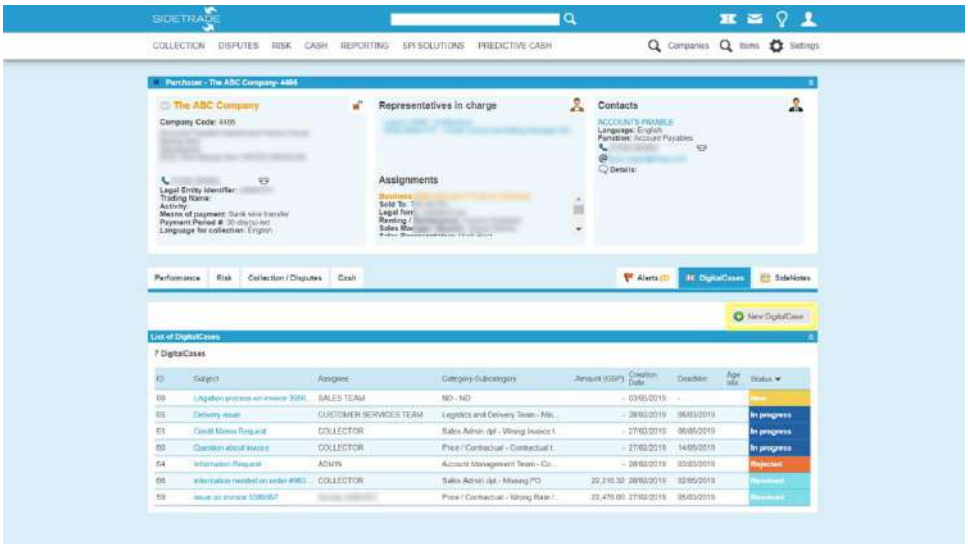
Search can be done based on the name of the Customer Account, the address, the company code, or an assignment code.

Once the user has selected and validated the Customer Account, the email will automatically be identified, a **New** DigitalCase will be created on the Customer Account corresponding to the invoice number, and the sender's contact information will be added to the Contacts of the Customer Account.

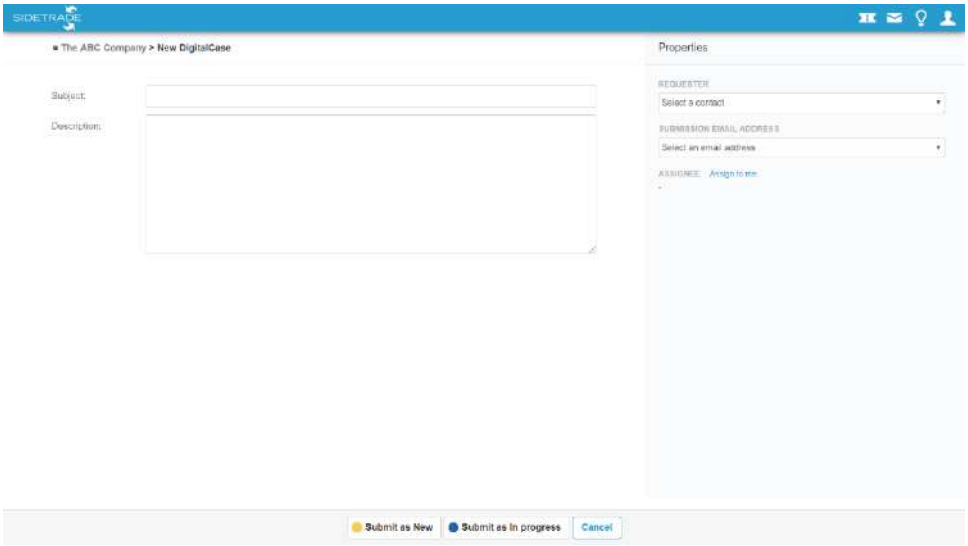
NB: If an incoming email is sent from an email address with an internal domain name, no new contact will be created in the Customer Account.

- *The user wishes to create a DigitalCase themselves following a customer phone call or an internal request*

It is possible to create a DigitalCase without an incoming email from Customer Account > **DigitalCases** tab > **New DigitalCase**



After clicking the **New DigitalCase** button, the user accesses a form allowing them to enter the DigitalCase information.



Information to fill are:

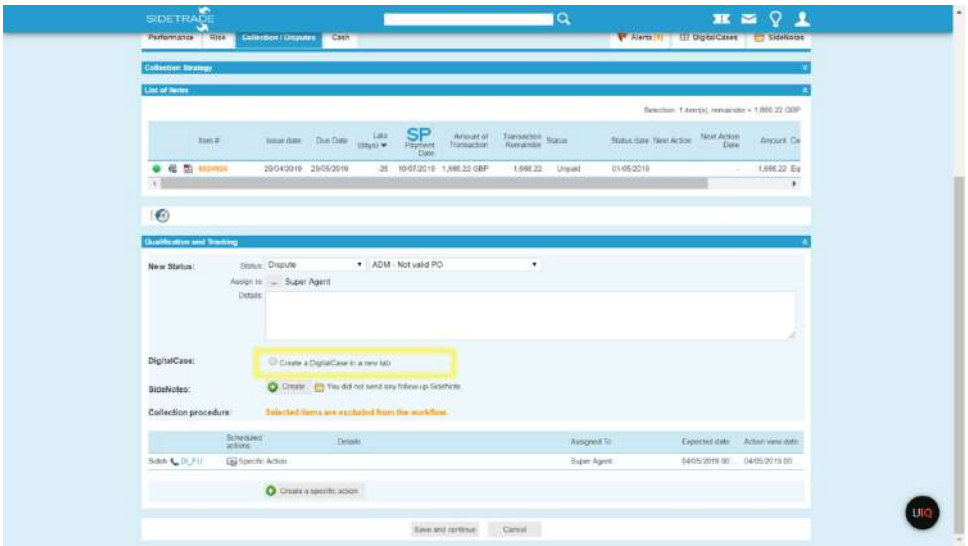
Subject	Title of the DigitalCase Note: The content will be visible in the acknowledgement message sent to the customer
Description	Details and any useful information concerning the DigitalCase context
Requester	Main contact of the Customer Account concerned by the DigitalCase Note: The customer contact selected will be the recipient of the automatic acknowledgement message
Submission email address	This email address will be the one used to send the acknowledgement message.
Assignee	By default, the DigitalCase will be assigned to the cash collector in charge of the account. However, if a user creates a DigitalCase on a Customer Account on which they are not the cash collector in charge of the account, this user can also assign the DigitalCase to themselves.

After entering all the information, the user can set the DigitalCase to the **New** status (no acknowledgement message will be sent to the Customer), or directly to the **In progress** status (the user then selects / validates the DigitalCase category, which sets the resolution deadline, and an acknowledgement message is automatically sent to the Customer).

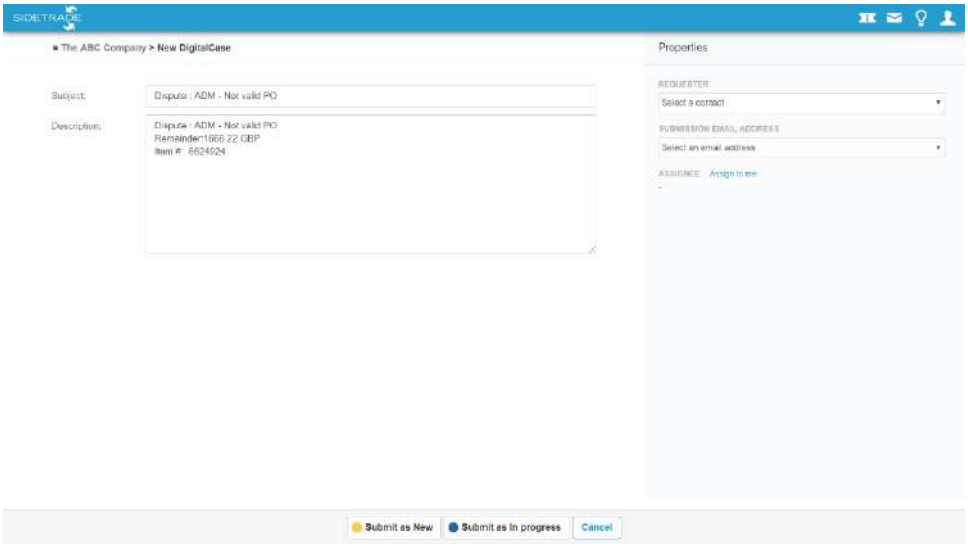
➢ *The user wishes to create a DigitalCase when qualifying an invoice*

It is possible to create a DigitalCase when qualifying an invoice.

After entering the status and the sub-status of the invoice, the user checks the **Create a DigitalCase in a new tab** radio button



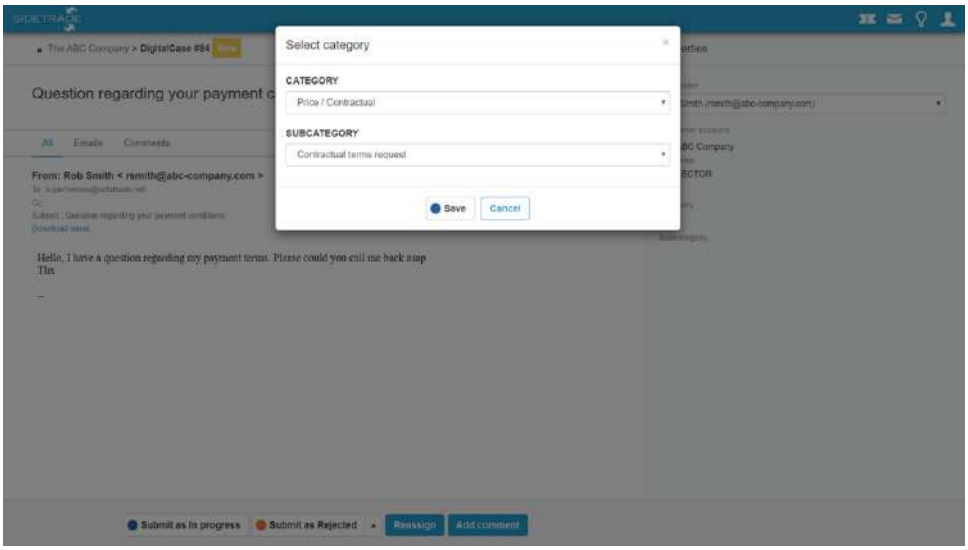
The user then clicks **Save and continue**, which opens a new tab used for the creation of the DigitalCase



Validate DigitalCase and category

1) Automatically via Aimie

When an incoming email is identified on the right Customer Account, the agent in charge confirms the handling of the DigitalCase by clicking **Submit as In progress**



If Aimie has been trained to recognise the DigitalCase category based on the content of the email (thanks to a set of labelled training data), then the DigitalCase category and sub-category will be pre-filled, and the agent in charge will only need to validate it (or modify it if the selection was incorrect) to set the DigitalCase as **In progress**.

2) Manually by the user

When an incoming email is identified on the right Customer Account, the agent in charge confirms the handling of the DigitalCase by clicking **Submit as In progress.**

If Aimie has not been trained to recognise the DigitalCase category based on the content of the email, the agent in charge selects the DigitalCase category and sub-category manually.

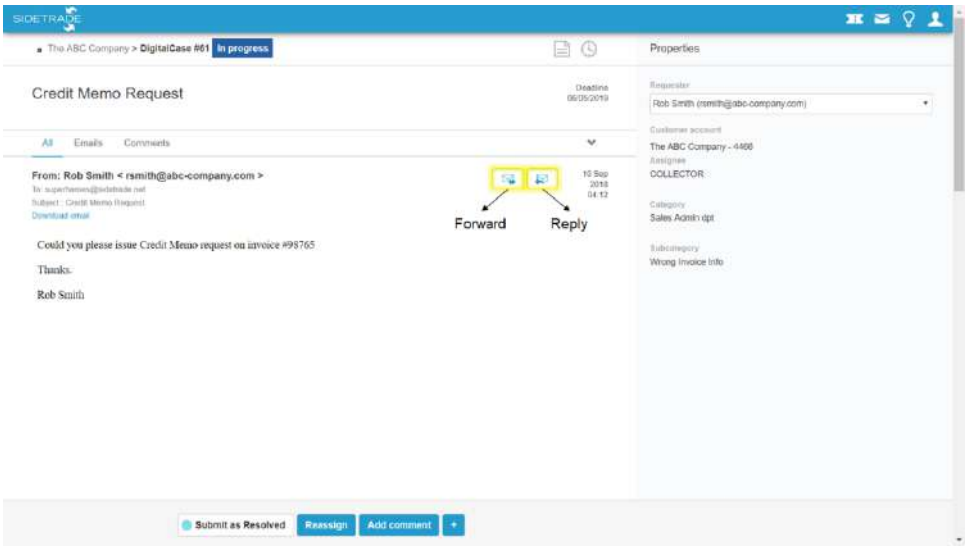
In both cases, validating the category / sub-category displays the resolution time for the DigitalCase and automatically sends an acknowledgement message to the Customer.

Manage DigitalCase

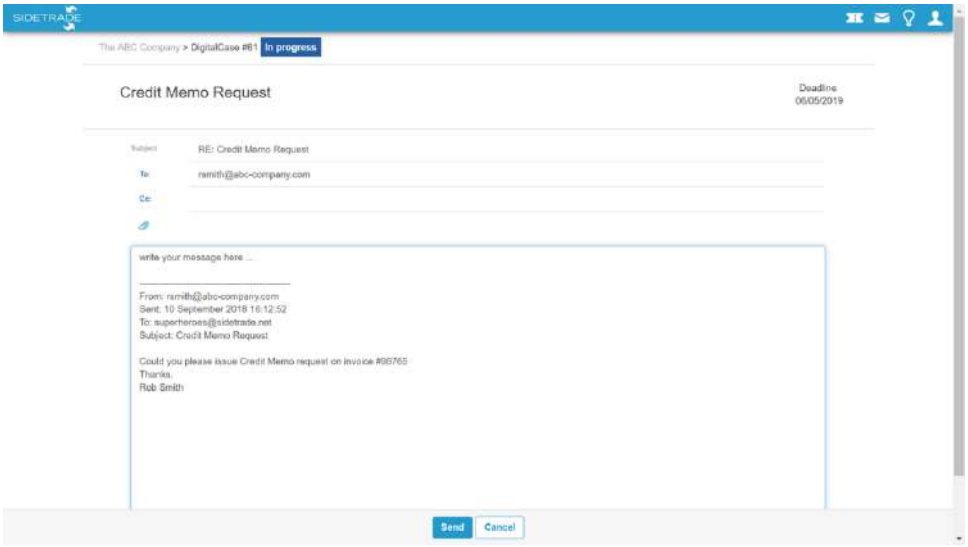
1) Reply or Forward messages

DigitalCase works as a messaging inbox. It is possible to reply or transfer an email.

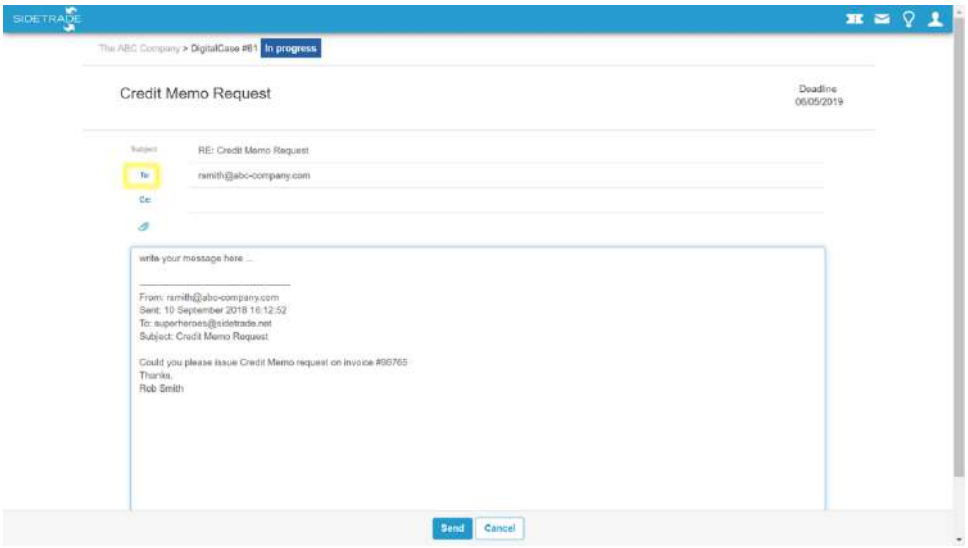
To do this, the user clicks the message that they wish to reply or transfer, then clicks on the **Reply** or **Forward** button.



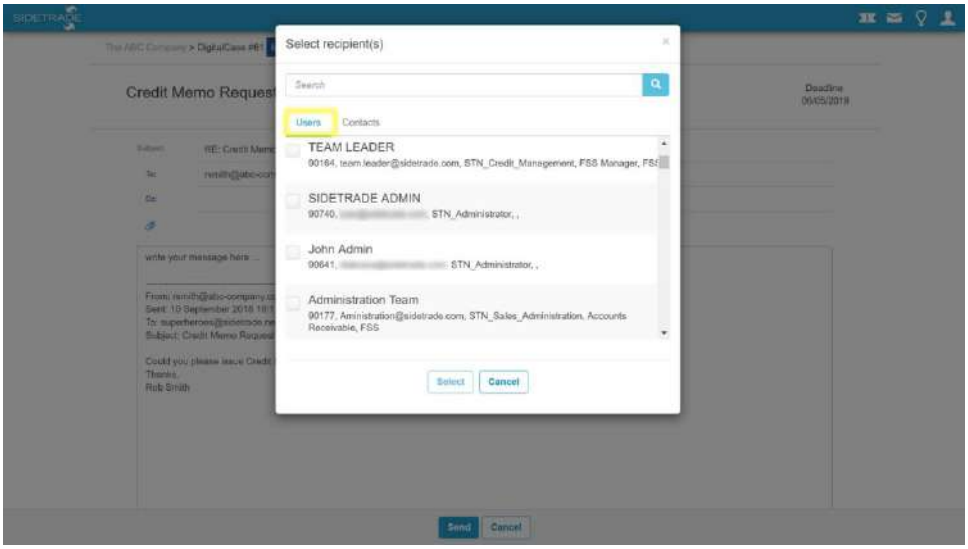
The user then writes their message.

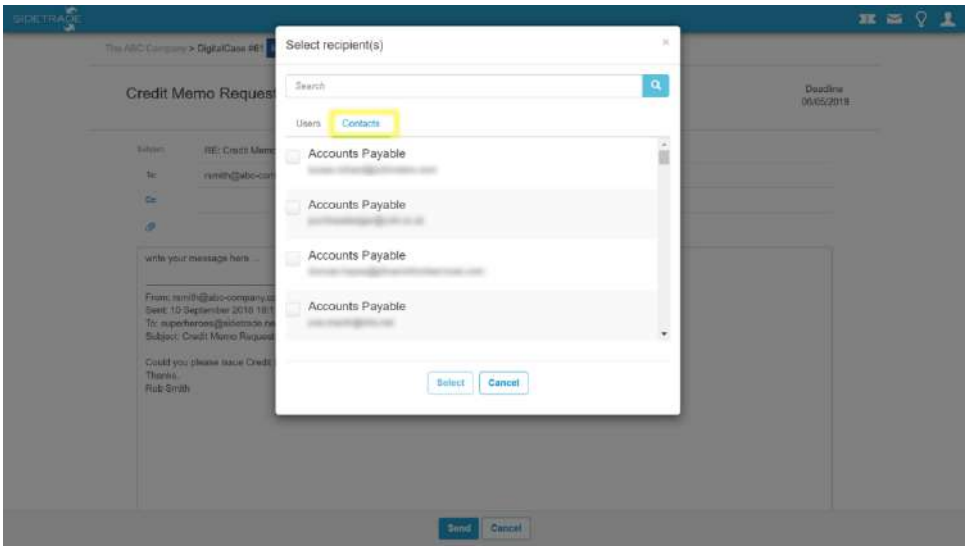


To add contacts as main recipients or to receive a copy of the email, the user clicks **To:** or **Cc:**.



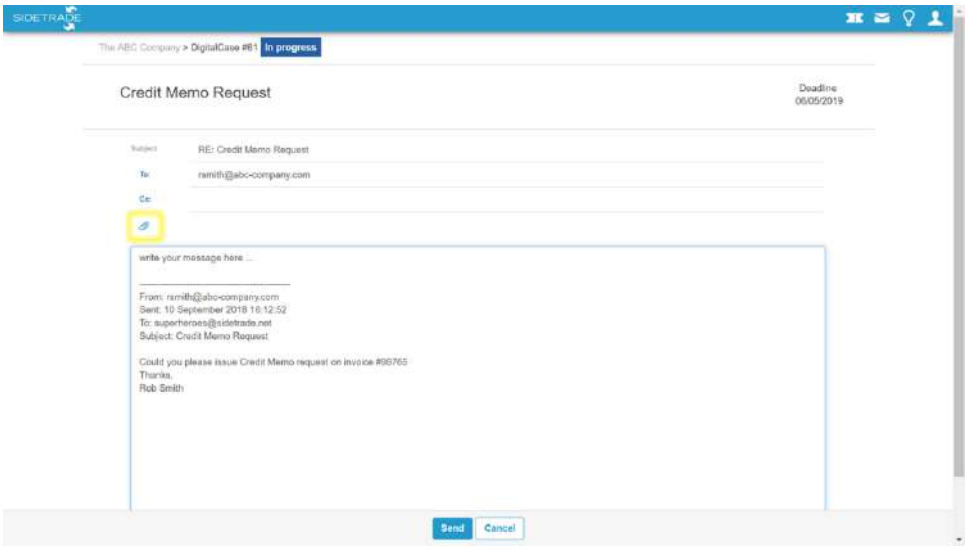
The user will automatically be redirected to a directory giving them access to the internal users, as well as to the customer contacts.





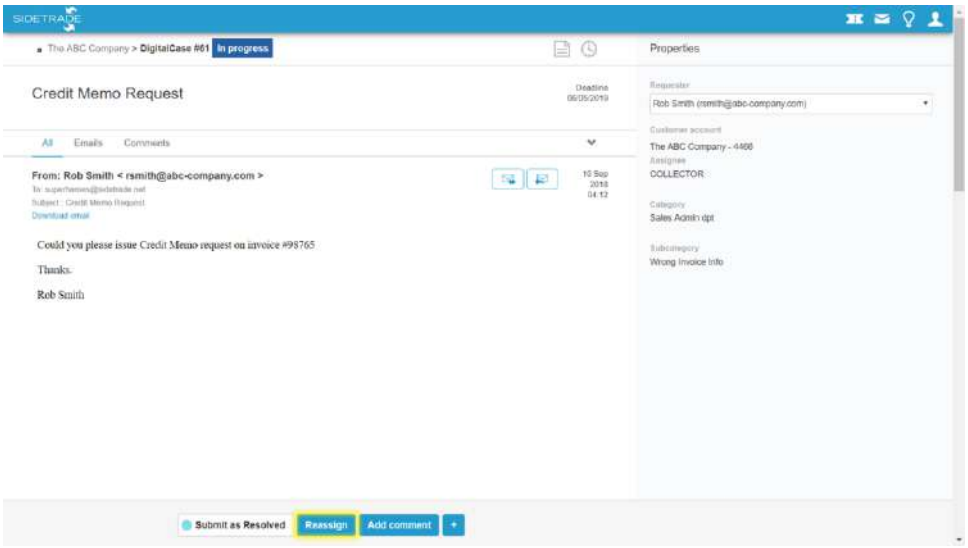
2) Attach a document

The user can also attach documents to their email by clicking the icon below. They can then upload documents from their workstation.

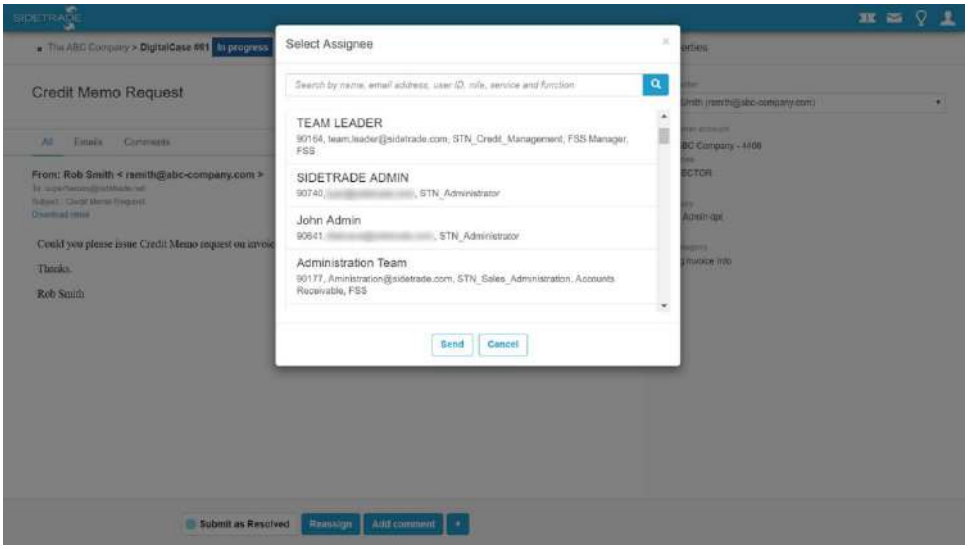


3) Reassign to a new resolver

If the user wishes to entrust management of the DigitalCase to another internal user, they can reassign the DigitalCase by clicking the **Reassign** button



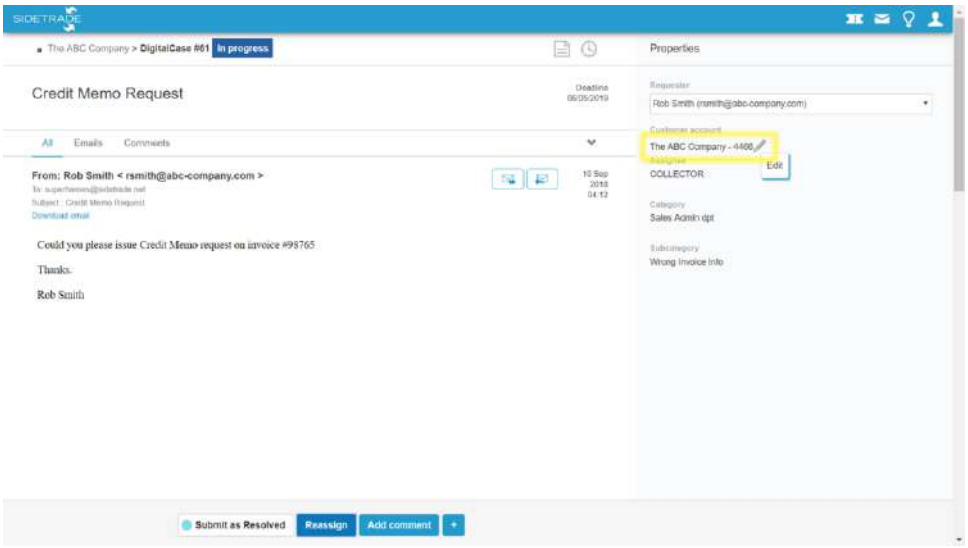
They then select the internal user to whom they wish to reassign the DigitalCase.



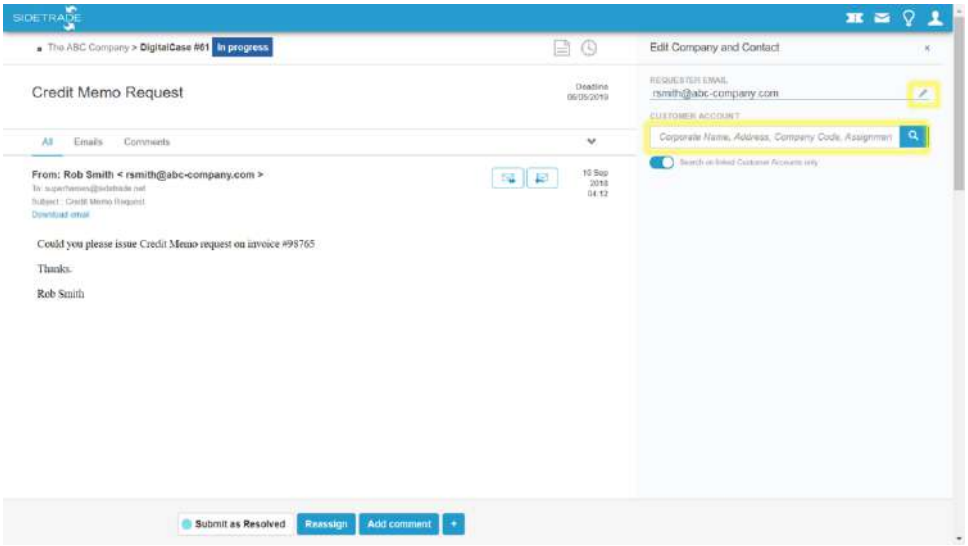
4) Move the DigitalCase to another Customer Account

If the incoming email has been identified on an incorrect Customer Account, the agent in charge can reassign the DigitalCase to another Customer Account.

To do this, the user clicks the  icon to the right of the Customer Account

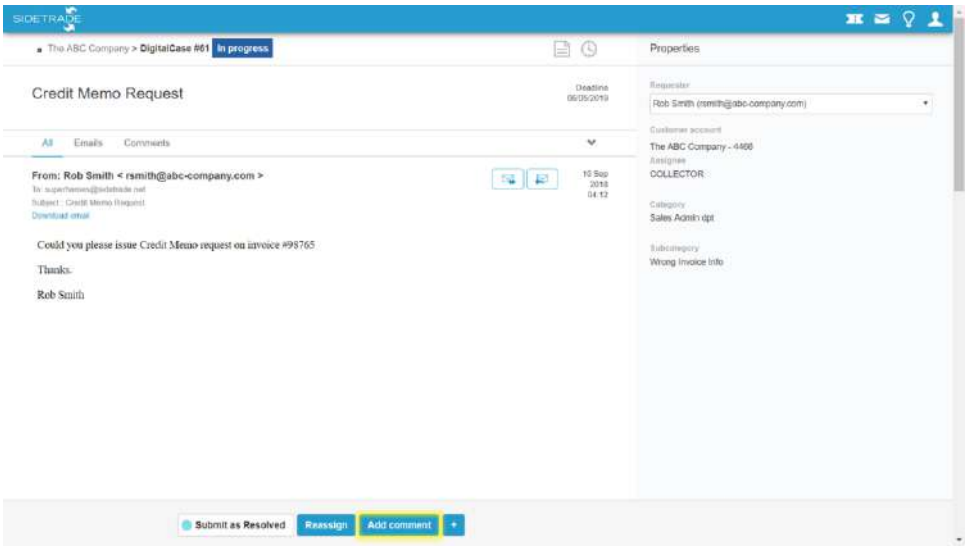


On this screen, the user can search for the Customer Account to which they wish to reassign the case. They can also modify the Requester.

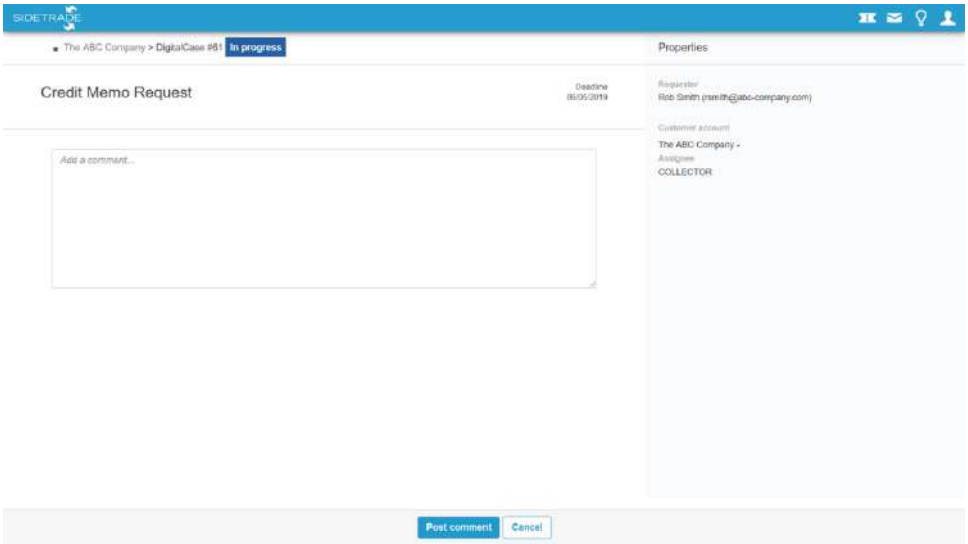


5) Add a comment

The agent in charge of the DigitalCase can add an internal comment by clicking the **Add comment** button



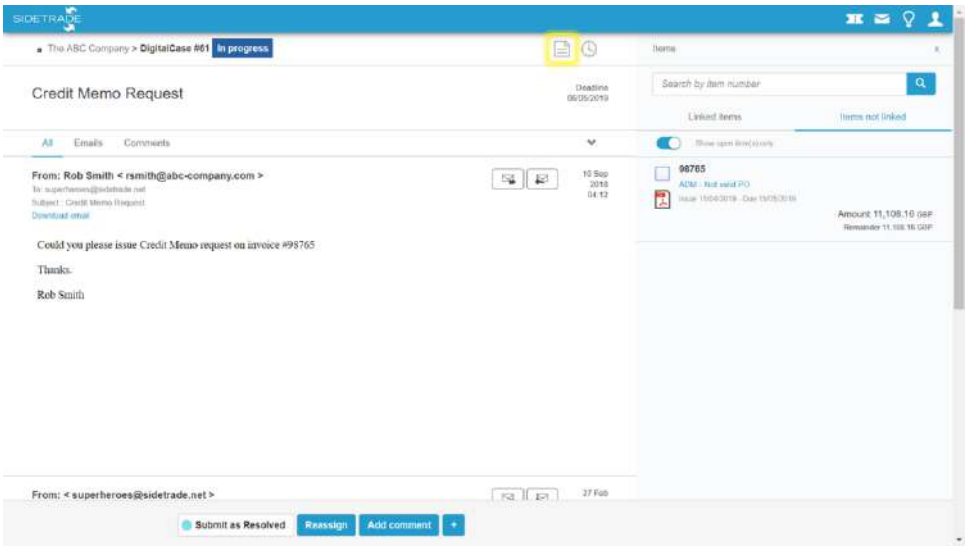
They can then write a comment which will only be visible to internal users.



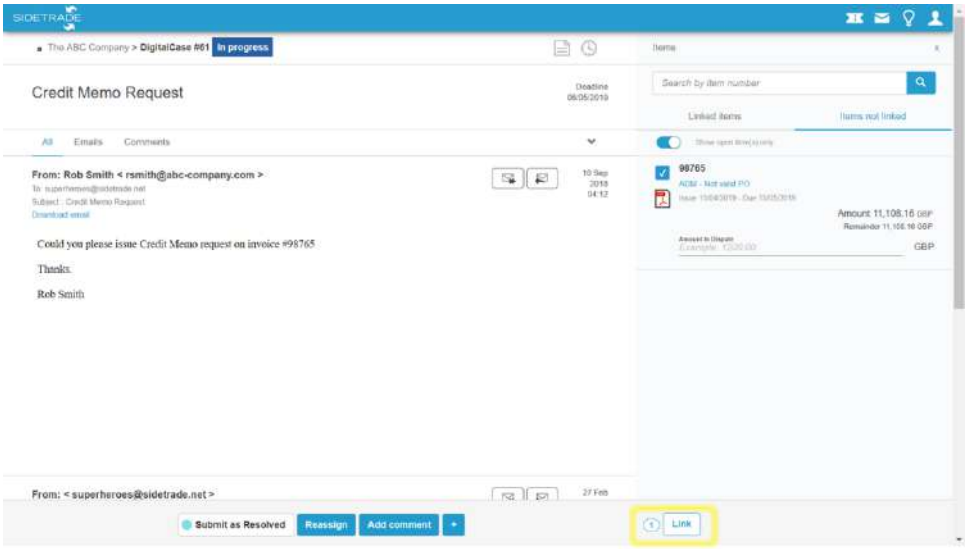
6) Link and/or update open item(s)

If the DigitalCase concerns one or more invoices, it is possible to link items to the DigitalCase to ensure better monitoring.

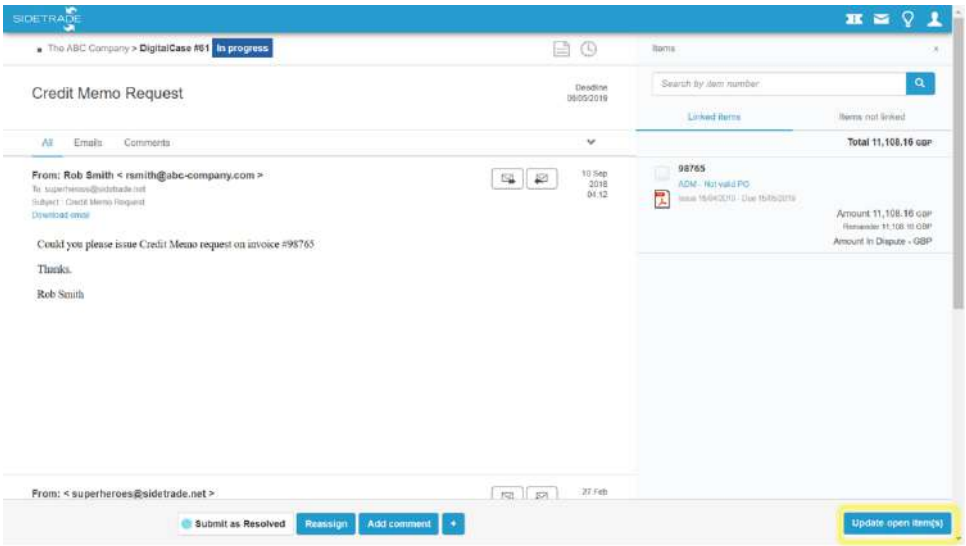
To do this, the agent in charge clicks the  icon to access all items on the Customer Account.



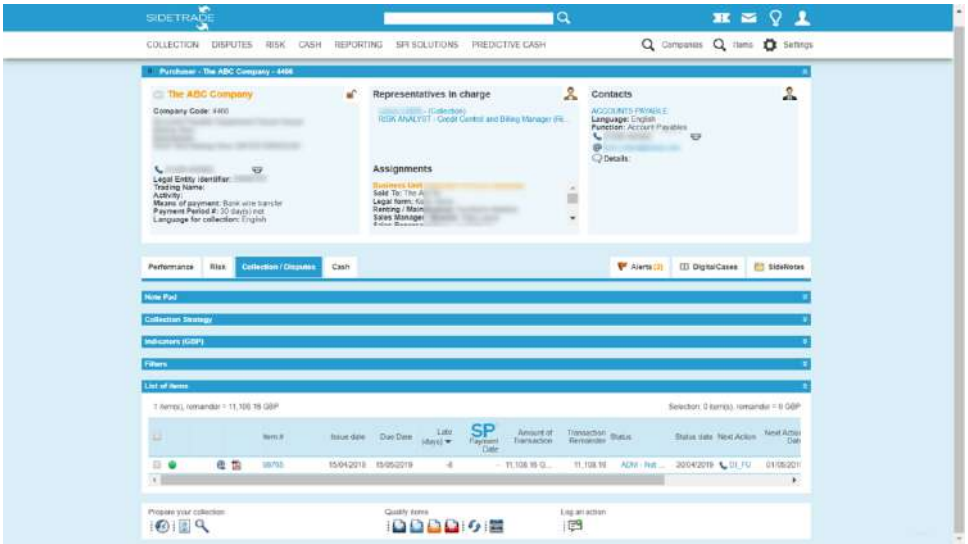
The user selects the item(s) that they wish to link to the DigitalCase.



Once the item(s) is/are linked to the DigitalCase, the user can qualify them by clicking the **Update open item(s)** button



The user is then redirected to the Customer Account to qualify the invoice(s).

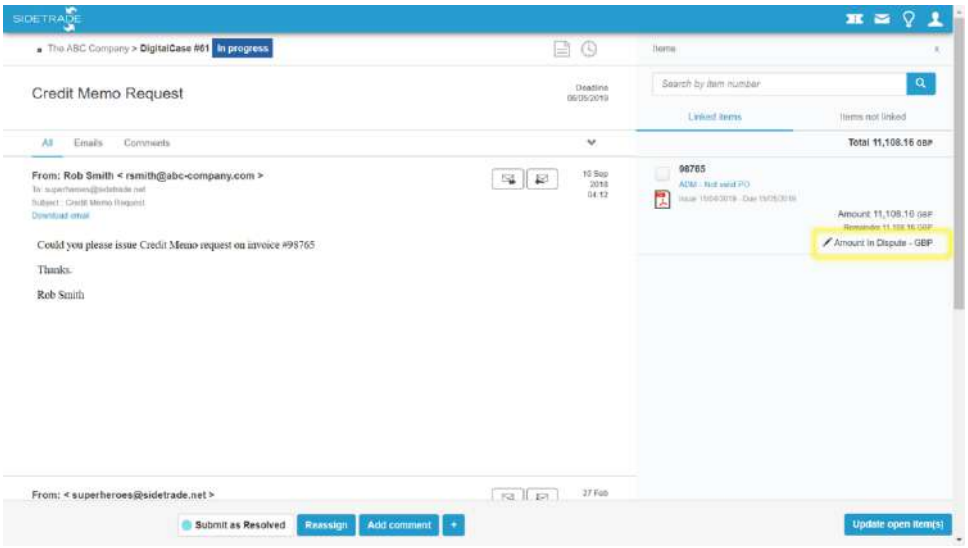


7) Issue a credit memo

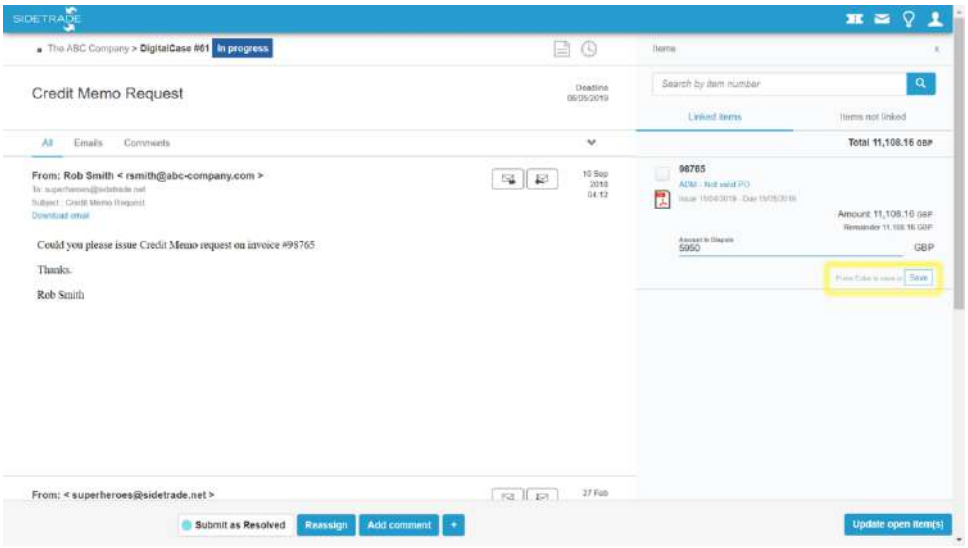
DigitalCase also offers the possibility of managing partial disputes.

If a dispute concerns part of the amount of the invoice(s) linked to the DigitalCase, they can enter an amount in dispute.

To do this, click the  icon to the left of **Amount In Dispute**



Then enter the partial amount of the invoice in dispute

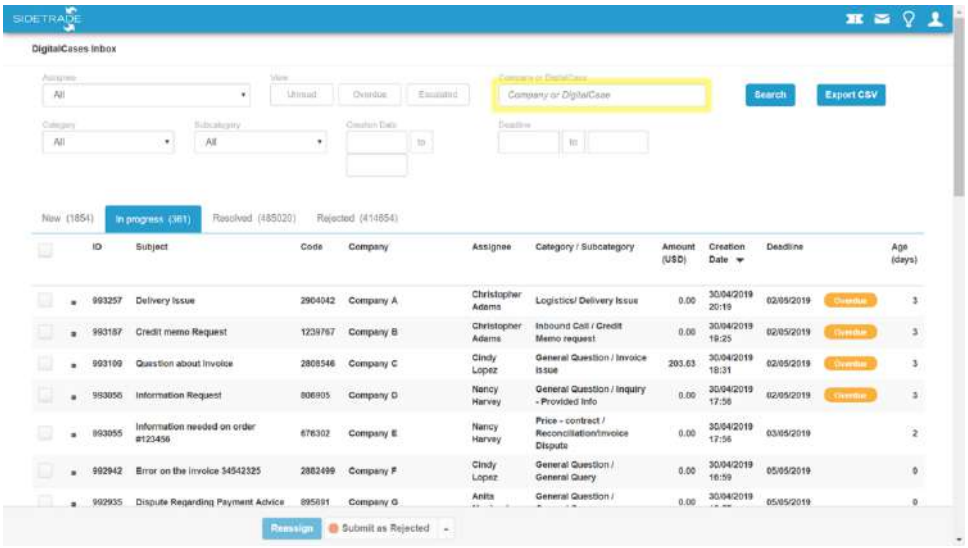


The partial dispute is validated once the DigitalCase is set as **Resolved**.

Therefore, a file consolidating all Resolved DigitalCases with a specific sub-status (defined by the Sidetrade Administrator) is extracted on a daily basis to allow the issue of credit memos on the corresponding invoices.

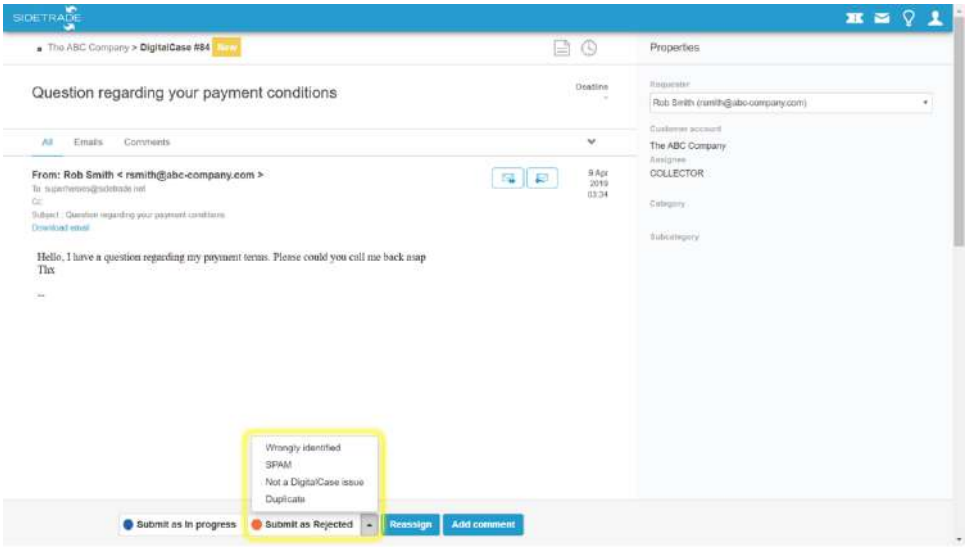
Existing DigitalCase Search

From the DigitalCase inbox, it is possible to find an existing DigitalCase via the search using several criteria: the case number, the Customer Account number, the Customer Account name or keywords contained in the subject of the email



Reject a DigitalCase

The agent in charge of the DigitalCase can decide to reject the DigitalCase if they consider that it cannot be processed in its current state. There are several reasons for rejection:



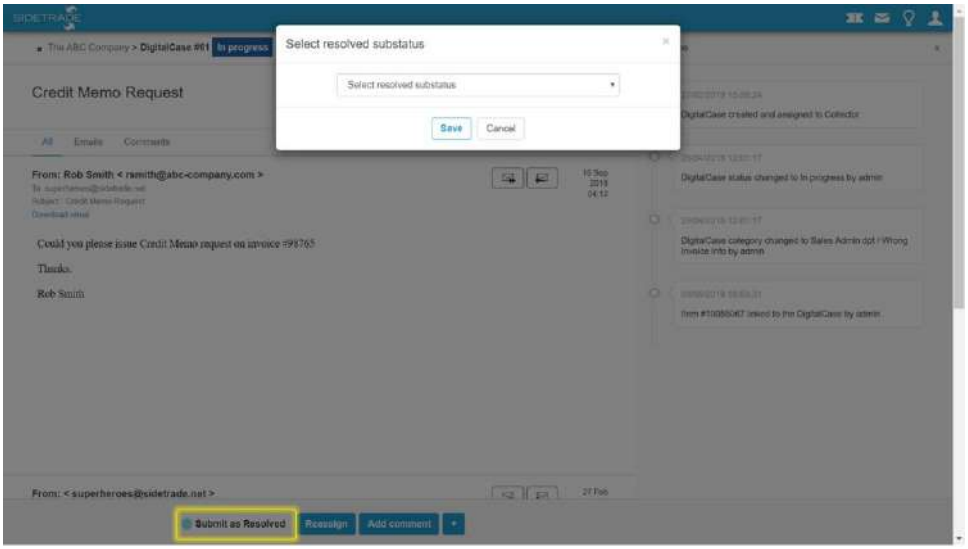
Wrongly identified	The DigitalCase has been attached to the incorrect Customer Account. If the assignee does not know to which Customer Account to reassign the DigitalCase, they can click **Submit as Rejected – Wrongly identified**. The email is then returned to the inbound emails identification list and can be re-identified by another member of the team. Note: if the assignee knows to which Customer Account to reassign the DigitalCase, they can change the Customer Account directly in the DigitalCase by clicking the icon to the right of the Customer Account

SPAM	The DigitalCase is in fact SPAM. By clicking **Submit as Rejected - SPAM**, the email will be permanently deleted.
Duplicate	The DigitalCase is a duplicate of an existing DigitalCase. By clicking **Submit as Rejected - Duplicate**, the agent in charge can merge the open DigitalCase with an existing DigitalCase by entering the No. of the existing DigitalCase.
Not a DigitalCase issue	The DigitalCase is not to be processed in DigitalCase since it is a customer request outside of the DigitalCase scope. By clicking **Submit as Rejected – Not a DigitalCase issue**, the email will be permanently deleted.

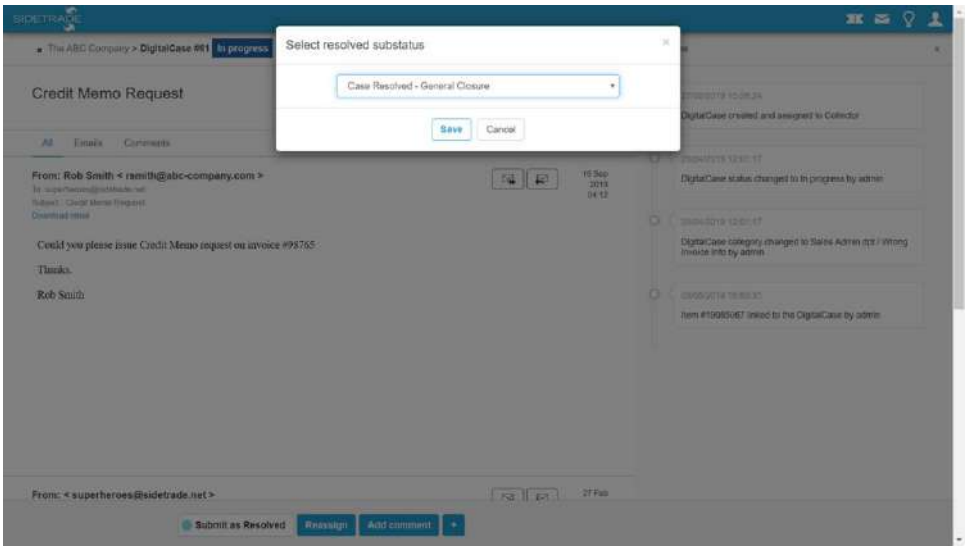
Close the DigitalCase

If the assignee considers that the DigitalCase has been processed, they can decide to close it manually.

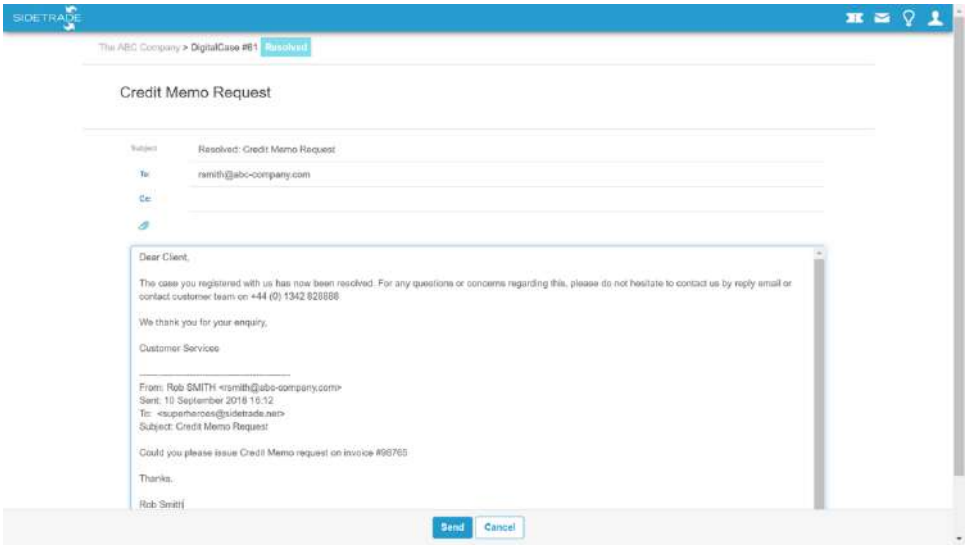
To do this, the assignee clicks on **Submit as Resolved**



Then selects a resolution sub-status.



The selection of a resolution sub-status generates the display of a resolution message.

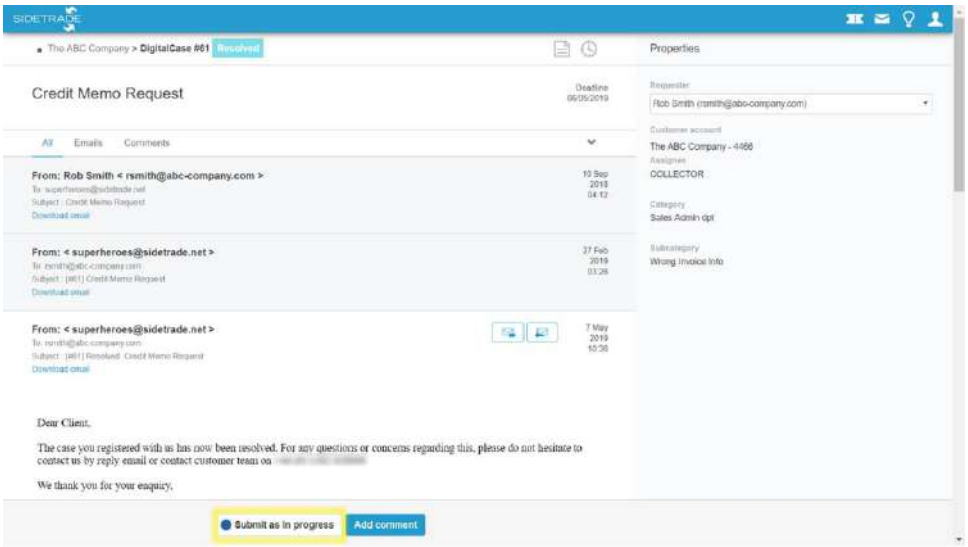


The agent in charge can decide to send the resolution message as-is, edit it, or not send it (by clicking Cancel).

💡 Note: The resolution statuses can be configured and customised.

Reopen a DigitalCase

If the DigitalCase is not fully resolved, the assignee can reopen the DigitalCase by clicking **Submit as In progress**



Settings

Several tasks are necessary for the DigitalCase configuration.

Settings executed by Sidetrade Teams

The list of settings below will be carried out by the Sidetrade teams. Please contact your Project manager to provide all items required for the implementation of the DigitalCase module.

1) Redirection of generic email addresses to the DigitalCase inbox and authorisation to use the domain name of the seller to send outgoing emails

DigitalCase is an inbox integrated into Sidetrade Financials, which can be used to centralise all incoming emails from your customers sent to your generic address / email alias, such as collection@company.com, then to be able to respond to your customers from the same generic address.

2) Content of the identification request email sent when the incoming email could not be identified
3) Selection of the images to be inserted in the header and footer of outgoing emails

One unique image can be choosen for the header and one unique also for the footer.

4) Content of the acknowledgement message and criteria for sending it

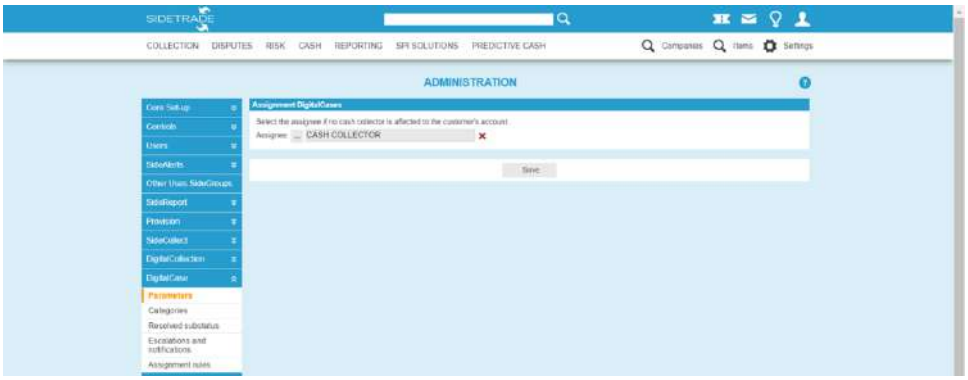
Settings to be done direclty in the DigitalCase Administration interface

Access	**Settings > Administration > DigitalCase**

1) Assignee by default

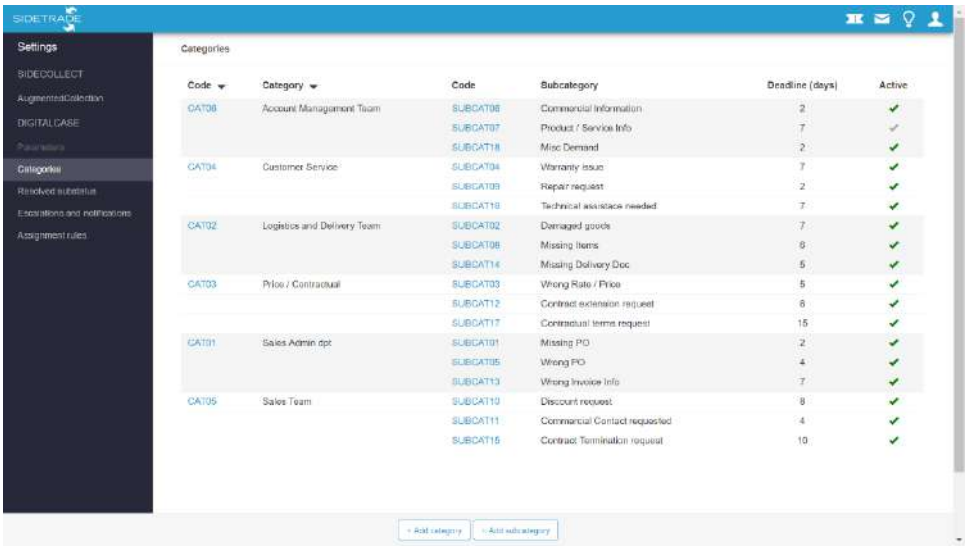
Access	**Settings > Administration > DigitalCase > Parameters**

If no agent is assigned to the Customer Account, the DigitalCase will be assigned by default to the defined user.



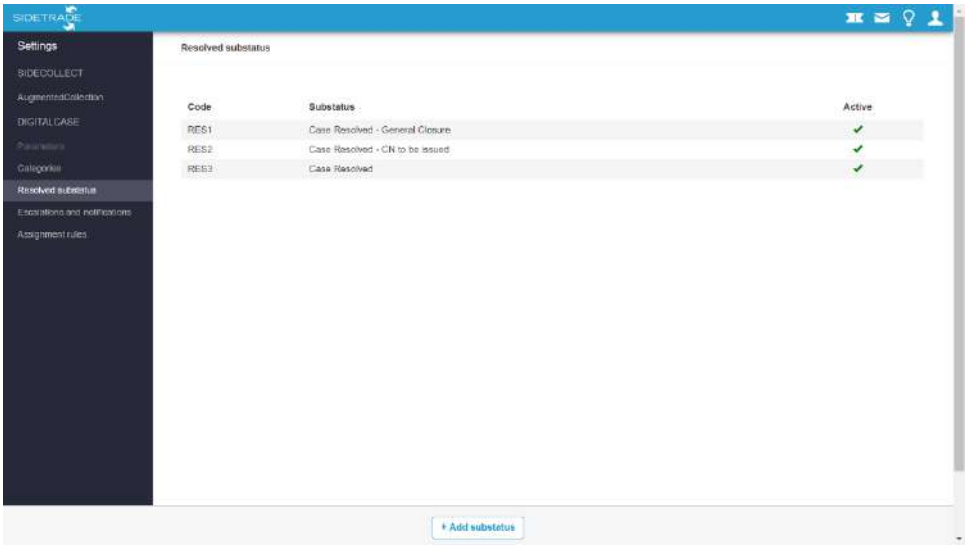
2) Categories

Creation of the categories and sub-categories, and their associated resolution time



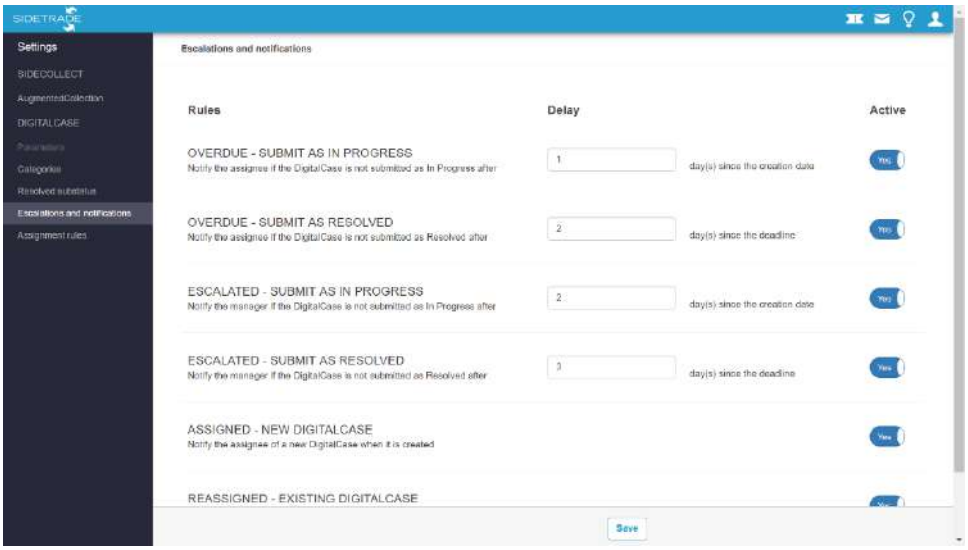
3) Resolution sub-status

This screen is used to configure the different resolution statuses and the associated message in several languages.



4) Escalations and notifications

This screen is used to configure the email notifications and escalation rules. An email will be sent automatically to the DigitalCase assignee or their manager once the notification is activated.



There are several criteria for sending email notifications:

For the assignee in charge of the DigitalCase

OVERDUE – SUBMIT AS IN PROGRESS	A notification email is sent to the assignee if a **New** DigitalCase has not passed to the **In progress** status after [X] days
OVERDUE – SUBMIT AS RESOLVED	A notification email is sent to the assignee if an **In progress** DigitalCase has not passed to the **Resolved** status after [X] days
ASSIGNED – NEW DIGITALCASE	A notification email is sent to the assignee to inform them that a **New** DigitalCase has been created on one of the accounts for which they are in charge. NB: The  icon is also used to notify the user that they have a **New** DigitalCase in their inbox

For the Manager of the assignee in charge of the DigitalCase:

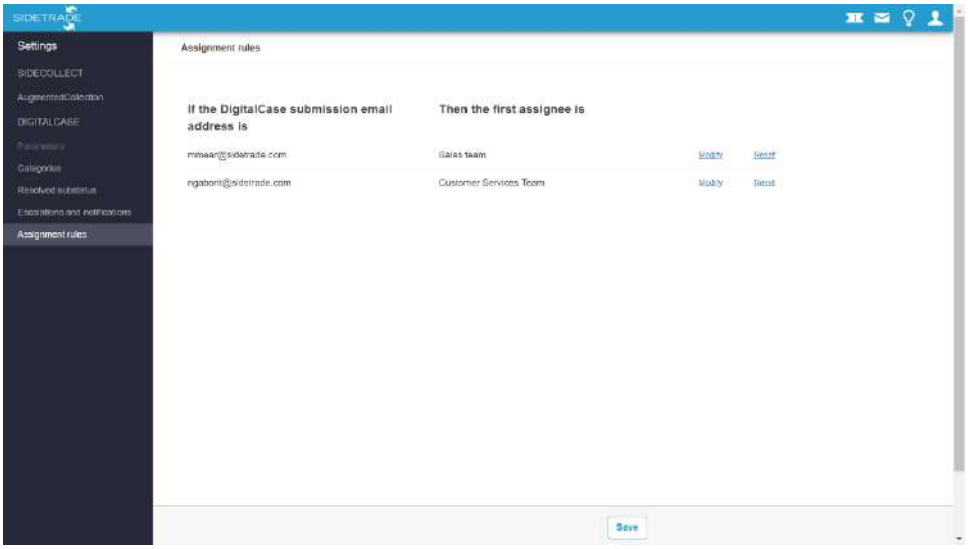
ESCALATED – SUBMIT AS IN PROGRESS	A notification email is sent to the manager of the assignee if a **New** DigitalCase has not passed to the **In progress** status after [X] days
ESCALATED – SUBMIT AS RESOLVED	A notification email is sent to the manager of the assignee if an **In progress** DigitalCase has not passed to the **Resolved** status after [X] days

5) Assignment rules

Access	**Settings > Administration > DigitalCase > Assignment rules**

It is possible to define specific assignment rules based on certain submission email addresses.

By default, the recipient is the agent in charge of the Customer Account. However, it is also possible to modify this and select a specific user. In this situation, all new DigitalCases sent to (or created with) this submission email address will no longer be assigned to the default agent, but instead to this selected user.



Q&A

Q: What do I need to do if I want to implement digital case ? Do I need to set up a mailbox ?

➔ A: No, the mailbox is fully integrated in Sidetrade Financials > no nee to set up an external mailbox. When your Customers send their inquiries to your Generic email address, all the incoming email will be centralized in the DigitalCase inbox.

Q: Is it possible to choose a specific generic email address ?

➔ A: Yes, it is fully customizable, you can set up any generic email address that you want

Q: Is there a capacity limit regarding the amount of incoming email?

A: No Limit regarding email enquiries capacity

Q: Is there a possibility to allocate the incoming emails according to the workload of the agents ?

➔ A: This is not included in the solution for now. It would be a product evolution.

Q: Are case resolution times set in calendar days ?

A: Yes, the SLA are based on calendar days

Q: Is it possible to implement DigitalCase without Machine Learning ?

A ➔ Yes. Without ML, identification of incoming emails is based on the Sender email address only. There is no identification based on multi criteria such as (invoice #, Contact Name, Partner Name, Partner #) and there is no possibility to identify the topic to qualify the email in a category.

However, it is still possible to start without Machine Learning and apply automatic machine learning algorithms after saving enough data from Client emails in the platform.

Q: What do I need to do in order to implement Machine Learning to automate incoming emails recognition ?

A ➔ To set up AI algorithm trained to recognize automatically Customer Account and Category based on the incoming emails content, a data set of emails history is required containing:

Information to identify the sender of the email such as Customer ID

The corresponding email file or a list of files that contain all the textual information in the email (including if possible the attachment files)

The relevant category of the email

The larger the email archives - 2 or 3 years of email history for instance - the more chance we stand to develop statistically significant matching rules and safer automated processes)

Q: What can I do if my customer sends to me an email when I have already opened a case on the same subject?

A ➔ In case of duplicate, you are able to merge a new case to an existing case.

Q: If I do not have an answer to my Customer issue, what can I do to ask again my colleague internally?

A ➔ DigitalCase works as a standard mailbox. So you can make a reminder to your colleague by re-transferring the email already sent to inform him/her that you are still waiting for an answer.

Q: What is the 'rejected' tab?

A ➔ In the rejected tab of the mailbox, you will find all emails that have been rejected manually for many reasons: SPAM, duplicate, etc.

Q: If I have multiple platforms, can I see the cases from all the platforms ?

A ➔ DigitalCase is designed to be multiplatform.

Q: If I am a Cash Collector and I am registering a dispute, can I create a case from invoice qualification ? Or is it mandatory for my Customer contact to send an email to the generic email address ?

A ➔ it is possible to create a case from the Customer Account. And you can do it directly during the invoice qualification step.

Q: what should be set in the DigitalCase administration before the module is activated ?

A ➔ The following elements must be set in the administration of DigitalCase

Generic email addresses set up

Category and sub-categories set up

SLA (case time-to-resolution)

Alerts and escalation notifications

Q: Are we able to apply a rule or is there some setting to stop the Acknowledgement and Identification message being sent out to some email addresses?

➔ The identification message is optional so we can deactivate it. With no identification message, all the unidentified emails will go automatically in the unassigned queue, and the users will assign manually all incoming unidentified emails.

The Acknowledgement message is automatic and we cannot deactivate it.

Q: What happens with emails that are not related to any customer?

➔ The email will go in the unassigned queue to be identified. If the Account exits in the database, the user will be able to assign manually the case to the right Account. If the Account doesn't exist in the database, it won't be possible to assign it on an Account until the Account is created.

Q: When an incoming email is direct to the DC inbox, will there also be an email received in the customers outlook inbox for the same address?

➔ The email is visible in DC inbox, as well as in Customer Outlook inbox. Depending on the settings of the inbox, forwarding rule can be applied to choose if the email has to remain in the outlook inbox or if the email has to be deleted after the redirection to DC.

However, if the user replies directly from his/her own Outlook mailbox, the email will not be redirected into DC Inbox.

Q: What is the subject for the "Resolved" message email?

➔ If a Customer sends an email with a subject: " Dispute : Wrong PO number"

The subject for the Resolved message will be : [#38] Resolved: Dispute : Wrong PO number

Q: Headers/Footers: Do these work on a entity level? Meaning can there be different headers/footers by entity?

➔ it Works on entity but headers & footers are the same for an entity.

Q: Resolved message: Is this a generic message? Is the client able to add detailed information to this? Is it possible to have a different template per resolution status?

➔ Yes, it is possible to set up a generic message per resolved status in DigitalCase Admin. And the user has still the possibility to edit the closing message before sending it.

Q° Escalations: After what date does the case SLA start ? Is it from date of receiving the case or the date of the SLA on the case being breached? After what date is the case escalated to the manager of the assignee?

➔ There are many types of email notifications :

For the Assignee :

- OVERDUE - SUBMIT AS IN PROGRESS > An email notification is send to the assignee if the DigitalCase has not been submitted as "In Progress" after X days since the reception of the email (case with a "NEW" status)
- OVERDUE - SUBMIT AS RESOLVED > An email notification is send to the assignee if the DigitalCase has not been submitted as "Resolved" after X days since the resolution deadline of the case

For the Manager :

- ESCALATED - SUBMIT AS IN PROGRESS > An email notification is send to the manager if the DigitalCase has not been submitted as " In Progress" after X days since the reception of the email (case with a "NEW" status)
- ESCALATED - SUBMIT AS RESOLVED > An email notification is send to the manager if the DigitalCase has not been submitted as " Resolved " after X days since the resolution deadline of the case