

**CASE MANAGEMENT**

Cases | Clients | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 22:05

Client ID

Case Number

Case Type

Case Status

Current Activity

Assigned To

From

To

Search

Clear

Client ID	Client	Case Number	Type	Status	Activity	Assigned To	Case Date	Created
57947824	Mind Bender	13491200	Type03	Open	Process	kapoor	2009-10-19	2009-10-19 13:46
39806973	Debbie Dimler	90996137	Type05	New	Review	howard	2009-10-20	2009-10-19 13:46
35367952	Jimmy Jammer	53306609	Type04	Open	Process	bratton	2009-10-24	2009-10-19 13:45
63941899	Sammy Super	48392534	Type05	New	Hold	palmer	2009-10-14	2009-10-19 13:45
14360999	Zimmer Zupan	98066076	Type05	Cancelled	Intake	bratton	2009-10-21	2009-10-19 13:45
57947824	Mind Bender	64580057	Type04	Open	Finalize	halpert	2009-10-06	2009-10-19 13:44
23732310	Timmy Tupper	59548681	Type02	Cancelled	Intake	palmer	2009-10-23	2009-10-19 13:41
63941899	Sammy Super	22474813	Type03	Closed	Approve	bratton	2009-10-22	2009-10-19 13:40
39806973	Debbie Dimler	79894892	Type01	New	Approve	kapoor	2009-10-21	2009-10-19 13:38

9 Row(s) Found

Case-13491200
Case-98066076
Case-59548681
Case-13491200
Case-48392534

Client

Type

Status

Current Activity

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Date



**CASE MANAGEMENT** Cases | Clients | Dashboard | CaseBook | Processors | Admin scott Nov 19, 2009 22:05

Client ID	Case Number	Case Type	Case Status	Current Activity	Assigned To	From	To
57947824							
39806973							
35367952							
63941899							
14360999							
57947824							
23732310							
63941899							
39806973							

Select file to upload by p845demo

docs

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  - iDisk
- PLACES
  - Desktop
  - Documents
  - harikolasani
  - Developer
  - Adobe Goodies
  - Applications
  - Downloads
  - 401k
  - BIZ
  - BOW

docs

- export.sql
- Test Exce...ment.xls
- Test Ima...ment.bmp
- Test Ima...ment.png
- Test PDF ...ment.pdf
- Test Pow...ument.ppt
- Test Text...ument.txt
- Test Wor...ment.doc

Cancel Select

Client ID	Client	Created
57947824	Mind Benc	2009-10-19 13:46
39806973	Debbie Di	2009-10-19 13:46
35367952	Jimmy Jar	2009-10-19 13:45
63941899	Sammy Su	2009-10-19 13:45
14360999	Zimmer Z	2009-10-19 13:45
57947824	Mind Benc	2009-10-19 13:45
23732310	Timmy Tu	2009-10-19 13:44
63941899	Sammy Su	2009-10-19 13:41
39806973	Debbie Di	2009-10-19 13:40
		2009-10-19 13:38

9 Row(s) Found

Case-13491200 Case-5

Case Details Document

	Document Title	Document Type	Version	Last Modified By	Last Modified Date
✓	Master Agreement	Agreement	1.0	beesly	2009-10-19 14:00
	Custoemr Letter	Letter	2.0	beesly	2009-10-19 14:00
	Custoemr Letter	Letter	1.0	beesly	2009-10-19 13:59
	Support Contract	Contract	1.0	beesly	2009-10-19 13:59
	Request for Forms	Request	1.0	beesly	2009-10-19 13:59

Document Title: Request for Forms | Document Type: Request | [Select File](#)

Add CheckOut Update Clear

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-- Select ▼

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-- Select ▼

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9 Row(s) Found

Case-13491200

Case-98066076

Case-59548681

Case-13491200

Case-48392534

Note Text	Added By	Date Added
New Data Came in	beesly	2009-10-19 14:00
Waiting for Docs	beesly	2009-10-19 14:00
This is a Crucial Case	beesly	2009-10-19 14:00

Note Text

**CASE MANAGEMENT**

Cases | Clients | Dashboard | CaseBook | Processors | Admin

scott Nov 19, 2009 22:05

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9 Row(s) Found

Case-13491200
Case-98066076
Case-59548681
Case-13491200
Case-48392534

Case Details
Documents
Notes
Workflow

Current Step Name	Enqueue Time	Route To	Comment	
Process	2009-10-19 14:15	-- Select --	Looking into it	<input type="button" value="Save"/> <input type="button" value="Complete"/>

Step	Enqueued	Event	Route To	UserId	Comment
Intake	2009-10-19 13:46	Completed		scott	To Process
Process	2009-10-19 13:51	Saved		beesly	Still Working on it
Process	2009-10-19 14:01	Saved		beesly	Sen tthe Letter
Process	2009-10-19 14:01	Saved	2009-10-19 14:15	howard	Looking into it

**CASE MANAGEMENT**

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scott Nov 19, 2009 22:05

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9 Row(s) Found

Client

Type

Status

Assigned To

Date

**CASE MANAGEMENT** Cases | Clients | Dashboard | CaseBook | Processors | Admin scott Nov 19, 2009 22:05

Client ID:  Client Name:  From:  To:

Client ID	Client Name	Address	City	State	Zip	Created
60437850	Ted Tupan	345 Amazon Blvd.	Rio	CT	57655	2009-10-19 13:34
14360999	Zimmer Zupan	345 Small Blvd	Bigland	KY	76765	2009-10-19 13:33
11552347	Cindy Super	3434 North Ave.	Dempton	AL	56765	2009-10-19 13:31
39806973	Debbie Dimler	3453 Super St.	Samrtville	AR	56567	2009-10-19 13:29
79486291	Peter Pam	345 Good Rd.	NiceLand	ME	67876	2009-10-19 13:26
57947824	Mind Bender	233 Main St.	Silverton	MN	56567	2009-10-19 13:25
63941899	Sammy Super	2345 South St	Sepura	LA	43543	2009-10-19 13:23
23732310	Timmy Tupper	3434 East Ave.	Zend	DE	786756	2009-10-19 13:21
35367952	Jimmy Jammer	123 Main St.	Tinsel Town	AZ	34545	2009-10-19 13:21

9 Row(s) Found

**Client-60437850** **Client-57947824** **Client-35367952**

Name \*

Address

City

State  ▼

Zip

Phone

E-Mail

**CASE MANAGEMENT** Cases | Clients | Dashboard | CaseBook | Processors | Admin scott Nov 19, 2009 22:05

Client ID:  Client Name:  From:  To:

Client ID	Client Name	Address	City	State	Zip	Created
60437850	Ted Tupan	345 Amazon Blvd.	Rio	CT	57655	2009-10-19 13:34
14360999	Zimmer Zupan	345 Small Blvd	Bigland	KY	76765	2009-10-19 13:33
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63941899	Sammy Super	2345 South St	Sepura	LA	43543	2009-10-19 13:23
23732310	Timmy Tupper	3434 East Ave.	Zend	DE	786756	2009-10-19 13:21
35367952	Jimmy Jammer	123 Main St.	Tinsel Town	AZ	34545	2009-10-19 13:21

9 Row(s) Found

**Client-60437850** | **Client-57947824** | **Client-35367952** | **New Client**

Name \*

Address

City

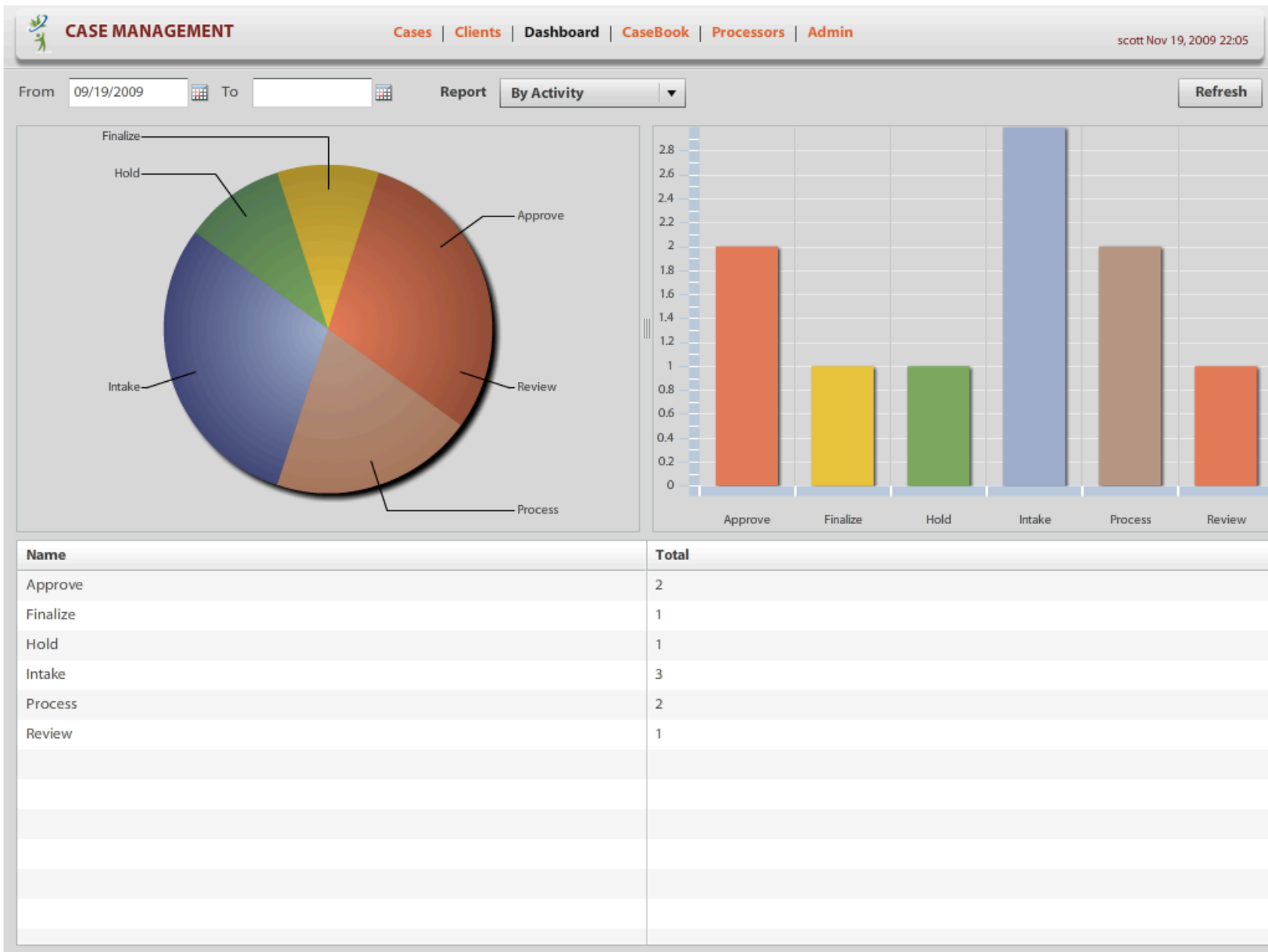
State

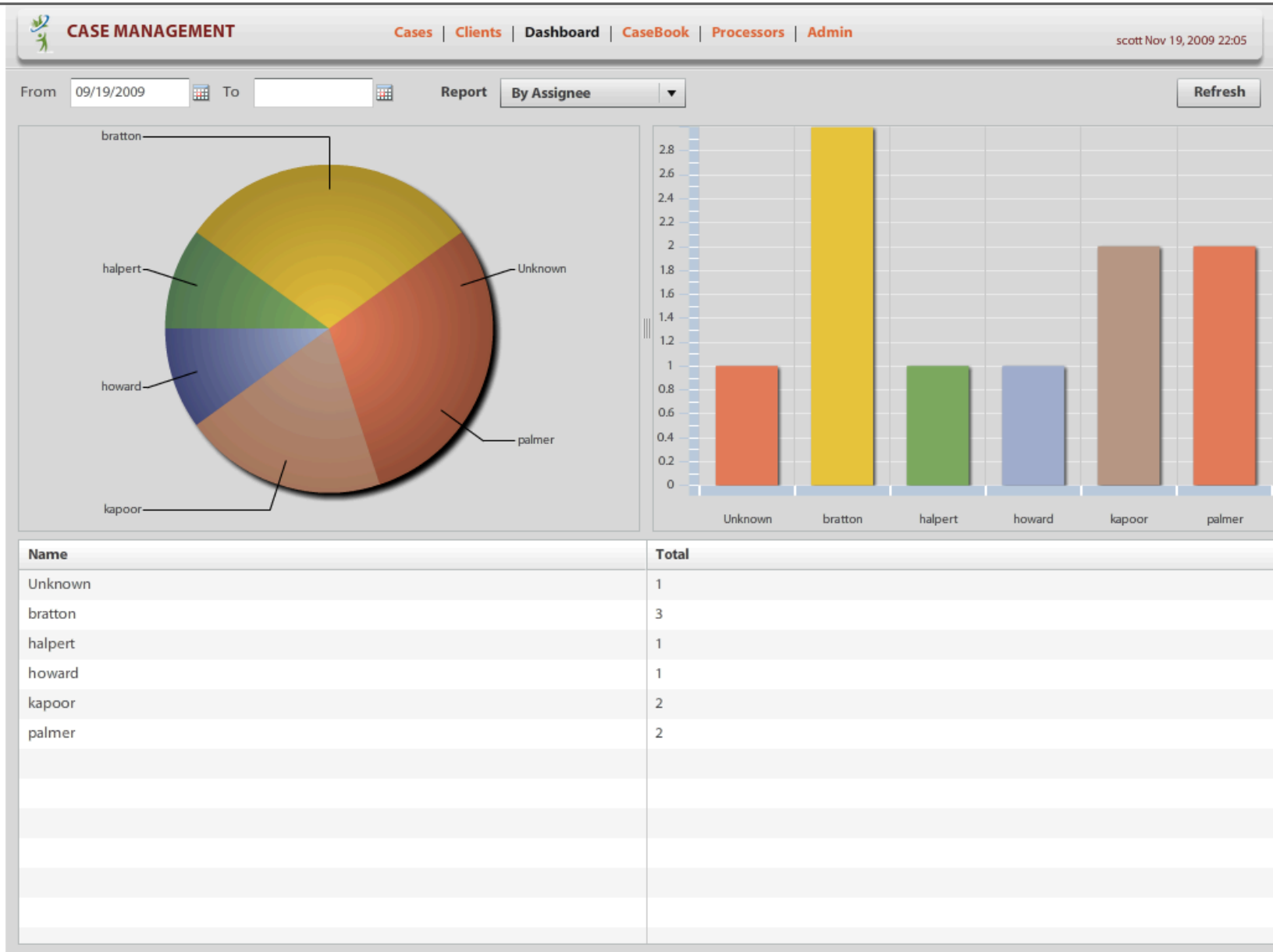
Zip

Phone

E-Mail











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Wall    Case-48392534


 **Ryan Howard** 2009-10-19 14:15  
Commented on Workflow Item : Looking into it    [Case 13491200](#)  
[Add Comments](#)

 **Pam Beesly** 2009-10-19 14:10  
Updated Case Details    [Case 48392534](#)  
[Comments](#)

 **Michael Scott** 2009-10-19 14:14  
Hey Pam, Where is Kelly  
   

 **Pam Beesly** 2009-10-19 14:09  
Commented on Workflow Item : Time is running out on this    [Case 22474813](#)  
[1 Comments](#)

 **Michael Scott** 2009-10-19 14:06  
Added Note: What's goign on with this    [Case 64580057](#)  
[1 Comments](#)

 **Michael Scott** 2009-10-19 14:06  
Added the Doc : Customer Letter    [Case 79894892](#)  
[1 Comments](#)

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User Id  First Name  Last Name

UserId	First Name	Last Name	Role	Departmnet	EEmail	Created
palmer	Merideth	Palmer	Clerk	Cases	palmer@dmiflin.com	2009-10-18 22:37
martin	Angela	Martin	Clerk	Cases	marin@dmiflin.com	2009-10-18 22:36
malone	Kevin	Malone	Clerk	Cases	malone@dmiflin.com	2009-10-18 22:36
beesly	Pam	Beesly	Clerk	Cases	beesly@dmiflin.com	2009-10-18 22:35
kapoor	Kelly	Kapoor	Clerk	Cases	kapoor@dmiflin.com	2009-10-18 22:34
administrator	Hari	Kolasani	Supervisor	Cases	administartor@@dmiflin.	2009-10-18 22:33
halpert	Jim	Halpert	Clerk	Cases	halpert@dmiflin.com	2009-10-18 22:32
bratton	Creed	Bratton	Clerk	Cases	bratton@dmiflin.com	2009-10-18 22:32
hudson	Stanley	Hudson	Supervisor	Cases	hudson@dmiflin.com	2009-10-18 22:29

14 Row(s) Found

**palmer** | **halpert** | **bratton**

User Id \*

First Name


Last Name

Role

Department

EEmail

Upload Image \*





**Case Types**

Type Name
Type01
Type02
Type03
Type04
Type05
<a href="#">Click to Add New Type</a>

**Case Statuses**

Status Name
Cancelled
Closed
New
Open
Pending
<a href="#">Click to Add New Status</a>

**Case Activities**

Activity Name
Approve
Finalize
Hold
Intake
Process
<b>Review</b>
<a href="#">Click to Add New Activity</a>

**Case Document Types**

Document Type Name
Agreement
Contract
Form
Letter
Request
<a href="#">Click to Add New DocumentType</a>