Case Management with Setuply and EL-ITE Consulting

What is Setuply Case Management?

Setuply is a client onboarding and lifecycle management platform purpose-built to increase revenue recognition and improve client retention. EL-ITE is utilizing Setuply's case management functionality, an integral part of the Setuply's overall solution designed to facilitate seamless collaboration between all stakeholders.

Submitting Cases

There are three different ways that a case can be submitted; Use a link, Email, and Client Portal.

**For a full overview of the Client Portal, including login instructions and step by step guides, please reach out to your EL-ITE contact for the "Client Portal - Introduction" document.

Use a link:

Follow the link (http://secure.setuply.com/L/10/Z2hwVsfY) and fill out the information provided in the form. By submitting that form you will automatically create a case.

Email support@el-iteconsulting.com

You can submit a case right from your email! If you have a question, concern or issue that you would like to submit a case for, simply email support@el-iteconsulting.com. You, and anyone that is CC-ed on your email will receive email updates regarding your case. You also have the ability to use the Client Portal to see statuses and make updates to the case.

Best Practices when sending an email to create a case:
- Keep the title of your email short but descriptive
- Provide as much detail about your question, concern or issue as possible in the body of your email.
- Screenshots and short videos can be attached to the email and will be part of your case

Create a case in the Setuply Client Portal

**For a full overview of the Client Portal, including login instructions and step by step guides, please reach out to your EL-ITE contact for the "Client Portal - Introduction" document.

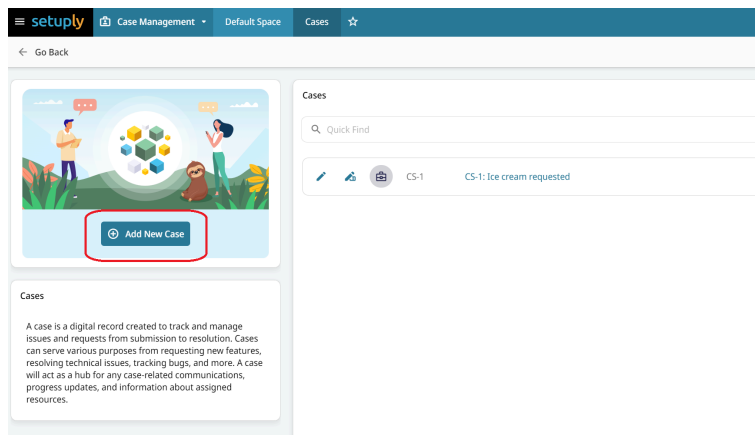When you log in to your Client Portal you can see your cases in two ways:

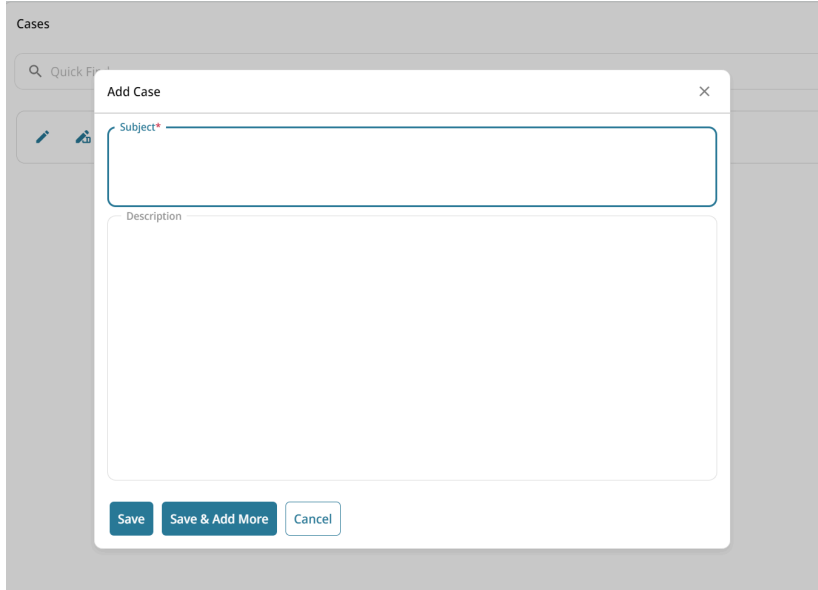1. Click the Orange "View Cases" button which will bring you to your list of cases
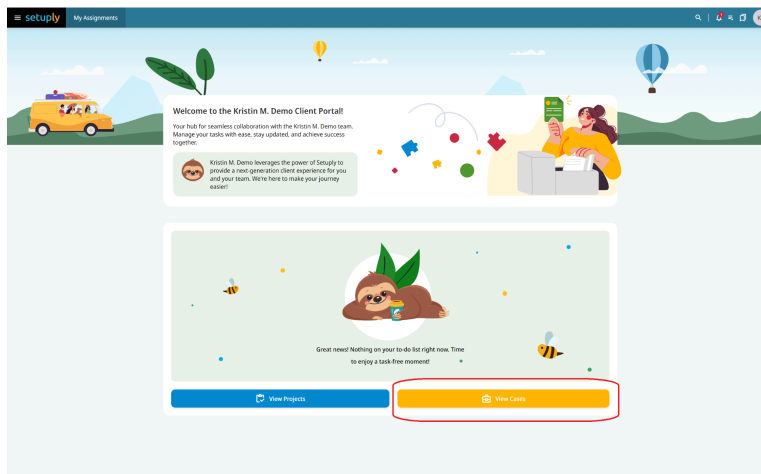
2. Utilizing the Menu at the top left hand side of the screen, you can navigate to "Case Management
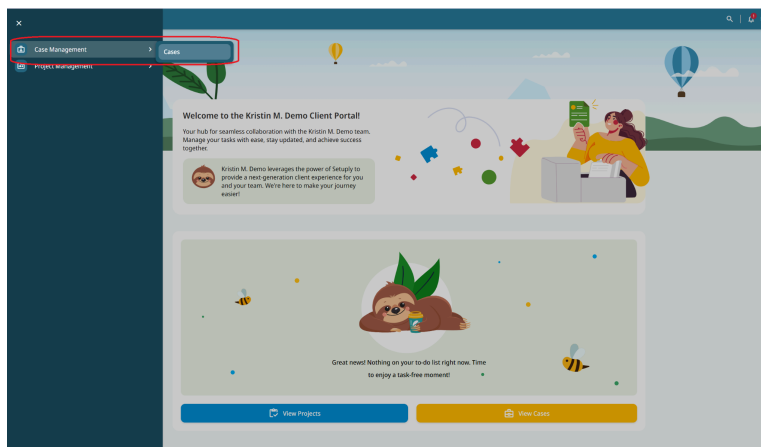
Once you are on the Case Management Page, go the to top left hand side of your screen and click "Add New Case"
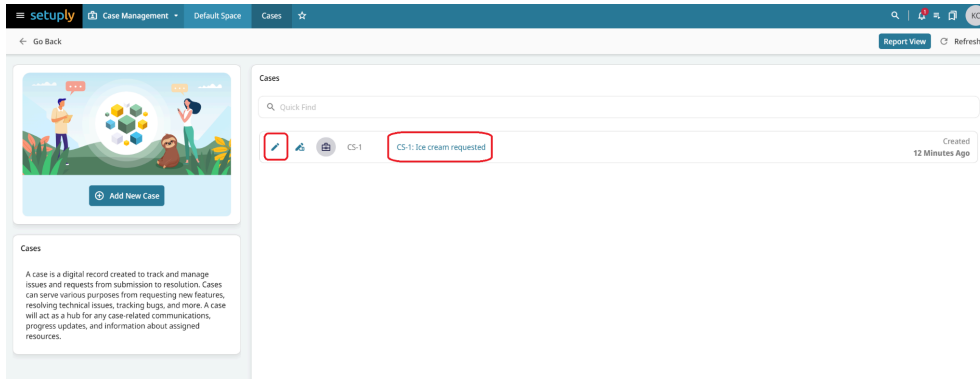
A pop up will appear where you can add your Case information. Keeping our best practices in mind from the previous section, give your case a Subject and Description. You can drag and drop any images into this description box as well, or you can do that in the next step. Click the "Save" button to save, and it will bring you right into the case details. If you have more cases to add, consider using the "Save & Add More" option which will provide you with a new pop up to submit another case.


Case Details

Regardless of how you submitted your case, you will always have access to your case details within the Setuply Portal. Navigate to your case list using either the orange button on the home page or the hamburger menu on the top left hand of the screen.

Once you are on your case list, you can open an individual case by click on the pencil icon or the subject of your case

Inside each case there are few widgets that will help you to gain visibility and communicate directly with the EL-ITE team.
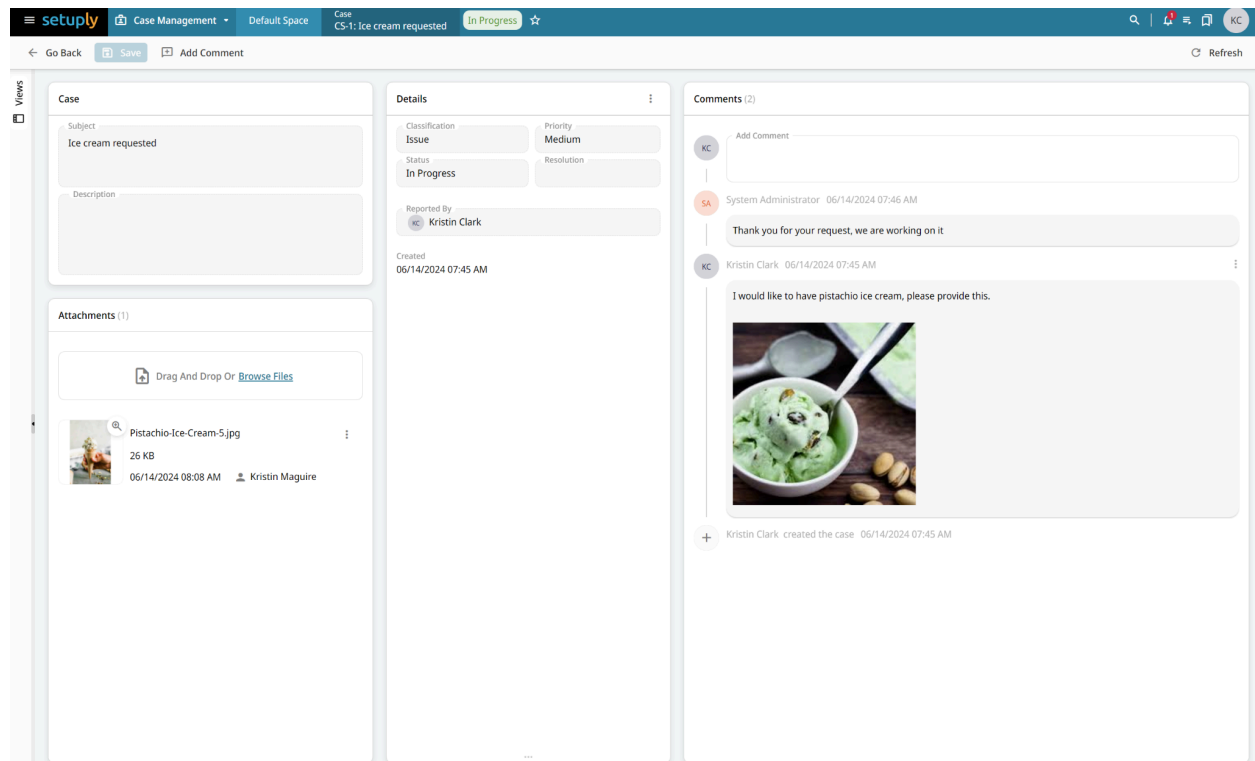
Here you can upload any media (screenshots, videos, excel documents), by either browning files or dragging and dropping them in the Attachments Section.

In the Comments section the description of your comment/issue will be the first comment. If you submitted it through email with a media file in the body of the email it will show as part of the comment. If you added a media file as an attachment it will show in the Attachments section. EL-ITE has the ability to comment back, and each new comment will be placed above the previous. Everything is time/date stamped for visibility.

EL-ITE will provide updated statuses of the case in the details section. It is also possible to see the status of the case in the case list view, once one is provided:
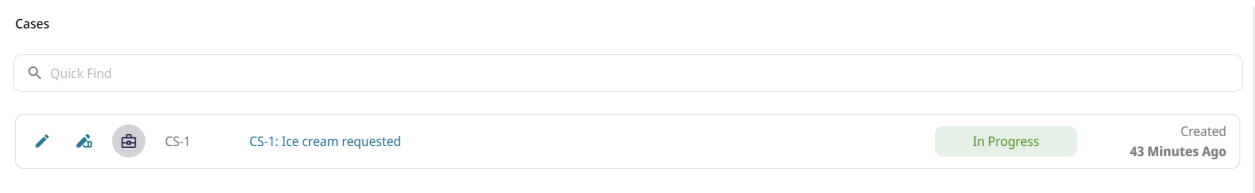
Email Notifications

You will receive an email notification when:
- A comment is added by anyone other than you

- EL-ITE updates the status
- EL-ITE establishes a classification for the case (issue, bug, request, etc.)
- EL-ITE provides a resolution to the case

If you would like to, you can respond directly to any notification sent to you and it will populate a new comment in the Case.