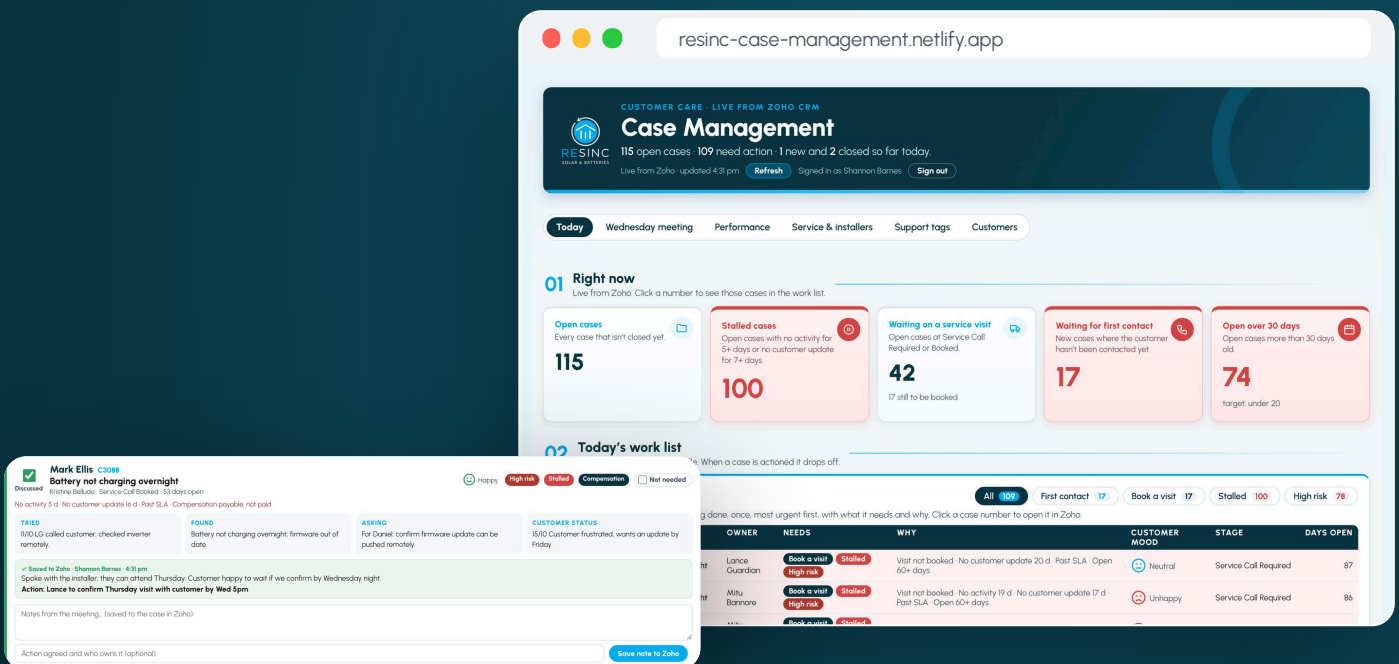


CUSTOMER CARE GUIDE

Case Management Dashboard

Every open case, what it needs and who has it, live from Zoho. Plus the Wednesday case meeting, with notes that save straight back to the case.

- 1 Sign in with your RESINC Google account
- 2 Work the Today list in the daily huddle
- 3 Run Wednesday's case meeting from the Meeting tab



The screenshot displays the 'Case Management' dashboard within a web browser. The URL bar shows 'resinc-case-management.netlify.app'. The dashboard header includes the RESINC logo and a status bar indicating '115 open cases, 109 need action, 1 new and 2 closed so far today'. Below the header, there are tabs for 'Today', 'Wednesday meeting', 'Performance', 'Service & installers', 'Support tags', and 'Customers'. The 'Today' tab is active, showing a 'Right now' section with five key metrics: 115 Open cases, 100 Stalled cases, 42 Waiting on a service visit, 17 Waiting for first contact, and 74 Open over 30 days. Below this is the 'Today's work list' section, which includes a detailed view of a case for 'Mark Ellis' (C3048) titled 'Battery not charging overnight'. This view shows a timeline of events, a list of tasks (e.g., 'Book a visit', 'Stalled'), and a table of customer status updates. The table has columns for Owner, Needs, Why, Customer Mood, Stage, and Days Open.

OWNER	NEEDS	WHY	CUSTOMER MOOD	STAGE	DAYS OPEN
Lance Guardian	Book a visit High risk	Visit not booked. No customer update 20 d. Past SLA. Open 60+ days	Neutral	Service Call Required	87
Milly Bamore	Book a visit High risk	Visit not booked. No activity 19 d. No customer update 17 d. Past SLA. Open 60+ days	Unhappy	Service Call Required	86

What it's for

Knowing which cases need a call, which have gone quiet and which customers are unhappy used to mean running reports in Zoho. The dashboard reads Zoho live and puts it on one screen, most urgent first.

CASE TEAM · EVERY DAY

Today

The headline numbers and one work list of every open case that needs something done, with what it needs and why.

SHANNON, MITU, CASE TEAM · WEDNESDAY

Wednesday meeting

The cases to talk about, grouped by owner, with the case brief on screen and notes that save to Zoho.

SHANNON, MITU, MANAGERS · WEEKLY

Performance

Targets, trends and each owner's numbers: speed to first contact, days to close, SLA and the 30-day backlog.

MANAGERS · AS NEEDED

Service, Support tags, Customers

Service visits and installers, how quickly the team answers tags from sales, and customer mood over time.

How a case gets flagged

5 d

Stalled

No note on the case for 5+ days, or no customer update for 7+ days. Booked visits are left out.

24 h

First contact

A new case where the customer hasn't been contacted yet.

7 d

Book a visit

At Service Call Required with no visit booked. The target is booked within 7 days.

!

High risk

Escalation risk, safety flag, urgent, open 60+ days, or past SLA with no update for 7 days.



OPEN THE DASHBOARD

resinc-case-management.netlify.app

Sign in with your **@resinc.com.au Google account**. Access: Shannon, Mitu, Leigh, Tim, Dejo, Aidan, Sacha and Chris. Ask Chris to add anyone else.

UNDER THE HOOD

Nothing to install. It runs in the cloud, reads Zoho live and refreshes itself every 5 minutes, so the numbers are never more than a few minutes old.

The Today tab

Open it at the start of the day and in the daily huddle. A red tile or row is behind target and needs attention first.

CUSTOMER CARE · LIVE FROM ZOHO CRM

Case Management

115 open cases · 109 need action · 1 new and 2 closed so far today.
Live from Zoho · updated 4:31 pm · **1** signed in as Shannon Barnes · [Sign out](#)

Today Wednesday meeting Performance Service & installers Support tags Customers

01 Right now

Live from Zoho. Click a number to see those cases in the work list.

Open cases
Every case that isn't closed yet.
115

Stalled cases
Open cases with no activity for 5+ days or no customer update for 7+ days.
100 **2**

Waiting on a service visit
Open cases at Service Call Required or Booked.
42
17 still to be booked

Waiting for first contact
New cases where the customer hasn't been contacted yet.
17

Open over 30 days
Open cases more than 30 days old.
74
target: under 20

02 Today's work list

Work this list in the daily huddle. When a case is actioned it drops off.

Work list 109 All 109 First contact 17 **3** a visit 17 Stalled 100 High risk 78

Every open case that needs something done, once, most urgent first, with what it needs and why. Click a case number to open it in Zoho.

CASE	WHAT IT'S ABOUT	OWNER	NEEDS	WHY	CUSTOMER MOOD	STAGE	DAYS OPEN
4 3097	Battery not charging overnight	Lance Guardian	Book a visit High risk	Visit not booked · No customer update 20 d · Past SLA · Open 60+ days	Neutral	Service Call Required	87
C3106	Battery not charging overnight	Mitu Bannore	Book a visit High risk	Visit not booked · No activity 19 d · No customer update 17 d · Past SLA · Open 60+ days	Unhappy	Service Call Required	86

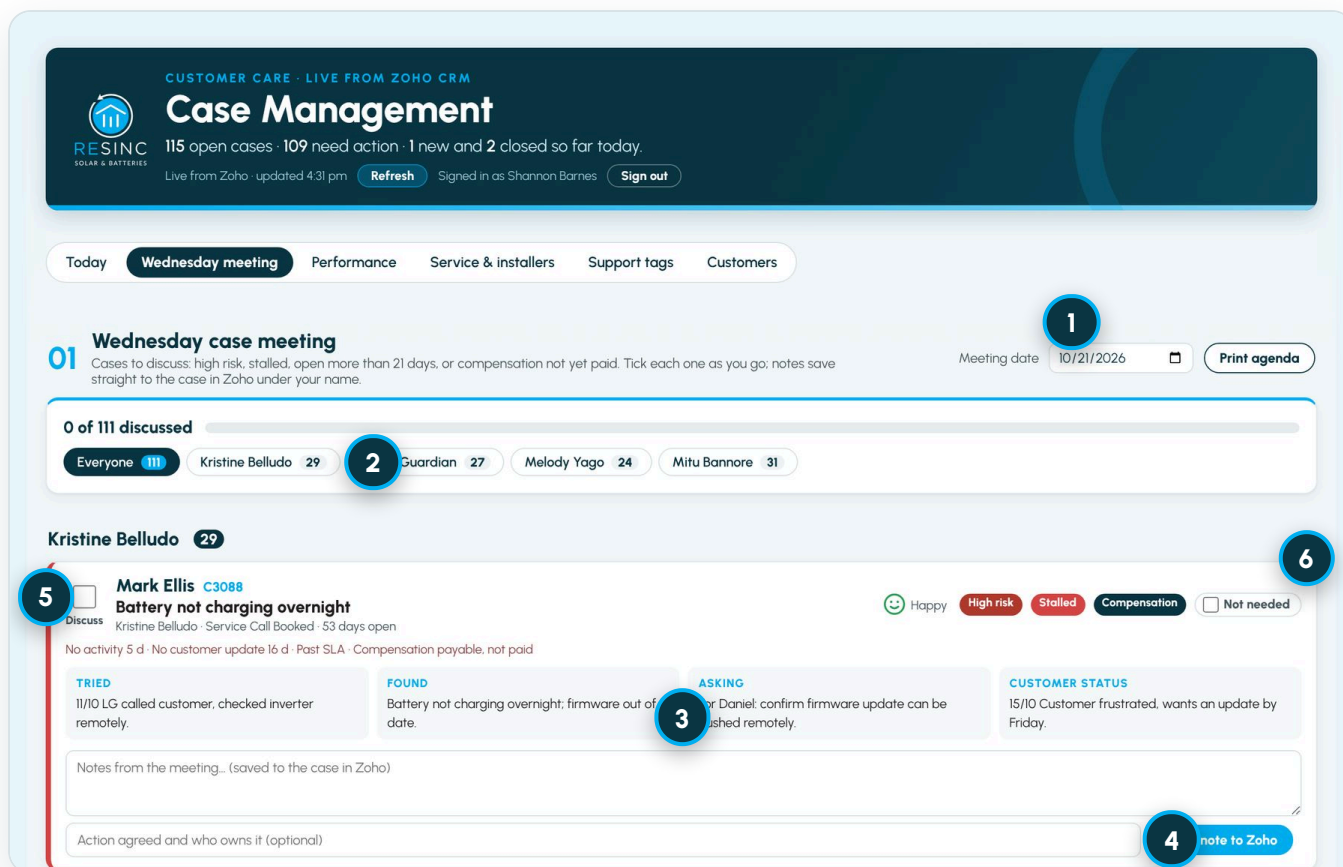
- Check the time it was updated.**
It refreshes itself every 5 minutes. Press **Refresh** after you've updated a case in Zoho to see it straight away.
- Read the five Right now tiles.**
Red tiles are behind target. Click a number to show just those cases in the work list.
- Filter the work list.**
First contact, Book a visit, Stalled or High risk. Click an owner's name in "Who has what" to see only their cases.
- Click the case number to open it in Zoho and action it.**
Once there's a new note or the status changes, the case drops off the list at the next refresh.

i Customer mood is read from the customer's own words in the notes. A dash means no customer message has been scored yet. Scores refresh every Sunday night.

! **"Zoho didn't answer just now"?** The page is showing the last good figures. It fixes itself at the next refresh. If it stays for an hour, tell Chris.

Run the Wednesday meeting

The **Wednesday meeting** tab builds the agenda for you: every open case that is high risk, stalled, open more than 21 days, or has compensation payable and not yet paid. Put it on the screen in the meeting room.



The screenshot shows the 'Case Management' dashboard for 'CUSTOMER CARE · LIVE FROM ZOHO CRM'. The 'Wednesday meeting' tab is selected. The interface includes a header with case statistics (115 open cases, 109 need action, 1 new, 2 closed), a navigation bar with tabs (Today, Wednesday meeting, Performance, Service & installers, Support tags, Customers), and a main section for the 'Wednesday case meeting'. The meeting date is set to 10/21/2026. A progress bar shows '0 of 111 discussed'. Below this, cases are grouped by owner, with 'Kristine Belludo' having 29 cases. A specific case card for 'Mark Ellis C3088' is highlighted, showing the title 'Battery not charging overnight', a status of 'High risk', and a 'Discuss' button. The case card includes sections for 'TRIED', 'FOUND', 'ASKING', and 'CUSTOMER STATUS'. A 'Print agenda' button is visible in the top right. Numbered callouts 1 through 6 are placed on the interface to guide the user through the process.

1 Check the meeting date.

It opens on the coming Wednesday. **Print agenda** gives a paper copy without the note boxes.

2 Go owner by owner.

Cases are grouped by owner, most urgent first. Tap a name to show only that person's cases.

3 Read the brief: Tried, Found, Asking, Customer status.

The customer's name is at the top of each card in large type, with the reasons it's on the list in red.

4 Type what was agreed and press **Save note to Zoho**.

Add the action and who owns it in the second box. It saves as a note on the case.

5 Tick **Discuss** when you've finished with a case.

Saving a note ticks it for you. The bar at the top shows how many are done.

6 Tick **Not needed** if a case doesn't need talking about this week.

It moves to the bottom of the page and stops counting towards the total.

Notes, ticks and the brief

Everyone with the page open sees the same thing. If Mitu ticks a case on her laptop, it shows as ticked on the meeting-room screen within 30 seconds.


Mark Ellis C3088
Battery not charging overnight
Kristine Belludo · Service Call Booked · 53 days open
No activity 5 d · No customer update 16 d · Past SLA · Compensation payable, not paid

 Happy
 High risk
Stalled
Compensation
☐ Not needed

TRIED
 11/10 LG called customer, checked inverter remotely.

FOUND
 Battery not charging overnight: firmware out of date.

ASKING
 For Daniel: confirm firmware update can be pushed remotely.

CUSTOMER STATUS
 15/10 Customer frustrated, wants an update by Friday.

✓ **Saved to Zoho · Shannon Barnes · 4:31 pm**
 Spoke with the installer, they can attend Thursday. Customer happy to wait if we confirm by Wednesday night.
Action: Lance to confirm Thursday visit with customer by Wed 5pm

Notes from the meeting... (saved to the case in Zoho)

Action agreed and who owns it (optional)

A **saved note** shows in green under the brief with who wrote it and when. In Zoho it appears on the case as **"Case meeting Wed 21 Oct 2026 – Shannon Barnes"**, with the action and "Written by Shannon Barnes in the case meeting".

▼ **Taken off this week's agenda (2)**

Tony Russo · C3038 · Battery not charging overnight · Kristine Belludo — taken off by Shannon Barnes

Helen Ward · C3073 · Battery not charging overnight · Kristine Belludo — taken off by Shannon Barnes

Taken off this week's agenda lists every case ticked Not needed, with who took it off. **Put back** returns it to the agenda. Next Wednesday starts fresh, so a case still on the rules comes back.

Where the brief comes from



Kept up to date for you. Every weekday at 6:30 am the four brief fields are read against the case notes. Empty fields are filled, wrong ones corrected, and new information is added as a dated line.



Spot something wrong? Fix it in Zoho, in the Escalation Brief section of the case. The next morning's update keeps your wording if it's still right.



Write the note in the meeting. Drafts stay on the page while you work, but they're only saved to Zoho when you press Save note to Zoho.



"Zoho didn't accept the note"? Copy what you wrote, add it to the case in Zoho by hand, and tell Chris.

What runs on its own

Nobody needs to run reports or update the dashboard. These jobs run in the cloud, so no one's computer needs to be on.

1	Live numbers	Every case figure is read from Zoho when the page opens and every 5 minutes after.	ALWAYS ON
2	Case brief update	Reads each open case's notes and keeps Tried, Found, Asking and Customer status current.	WEEKDAYS 6:30 AM
3	Customer mood and tags	Scores the customer's own messages, times first contact and checks replies to support tags.	SUNDAYS 7:45 PM
4	Monday summary email	Last week in numbers, stalled cases and who needs a call, emailed to Shannon and Mitu.	MONDAYS 7:15 AM
5	Meeting notes	Saved straight to the case in Zoho the moment you press Save note to Zoho.	IN THE MEETING

Make the numbers right

Log every contact as a note

Calls, emails, texts and voicemails. A case with no note for 5 days shows as stalled, even if work is happening.

Fill in Last Customer Update

Update the date each time you speak to the customer. It drives the "no customer update" flag.

Set Initial Acknowledgement

Pick how you first contacted the customer. It stamps First Response At, which drives first contact.

Book visits in Zoho

A booked visit date takes the case off the stalled list until the visit is due.



Questions or something not right?

Talk to Chris Johns. Shannon and Mitu can help with how the meeting runs.