

# CASE MANAGER 5.2 - DEBIT ORDER TAG MERGING

TECHNICAL MANUAL

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## SECTION 1 OVERVIEW AND PURPOSE

The Debit Order Extension uses Case Tags to describe and identify particulars related to active Debit Order Arrangements. Users are able to merge these case tags into Short Message Templates or Document Templates to automatically generate content according to the Case Tags you selected.

This document will explain the concepts of Case Tags and merging and how to implement, change and use the additional Case Tags added by the Debit Order Extension. The Case Tags added by the Debit Order Extension focus on active arrangements; thus, cases where arrangements were never made or cases with inactive arrangements will replace the debit order Case Tags with empty text.

## SECTION 2 DEFINITIONS

### MERGING

Merging replaces case tags with values related to a specific case in a message.

### CASE TAGS

Case tags are placeholders for values that will be merged into the message.

### CASE TAGS AND DESCRIPTIONS

Case Tag	Description
#DOA0001	Arrangement Amount
#DOA0002	Payment Interval
#DOA0003	Debit Order Entity ID Number
#DOA0004	Initials
#DOA0005	First Name
#DOA0006	Last Name
#DOA0007	Title
#DOA0008	Total Paid (Success)
#DOA0009	Failed Debit Order Total
#DOA0010	Cancelled Total
#DOA0011	Total Successful Count
#DOA0012	Total Failure Count
#DOA0013	Total Cancelled Count
#DOA0014	Total Submitted Count
#DOA0015	Next Instalment Date (Pre-Adjusted)
#DOA0016	Next Instalment Amount
#DOA0017	Last 3 Characters of Bank Account Number
#DOA0018	Account Type
#DOA0019	Bank Name
#DOA0020	Branch Code

## SECTION 3 STEP-BY-STEP PROCEDURES

The example provided below is for using the debit order case tags as part of Short Message Templates, but the same principles are applied for Document Templates.

## STEP 1: ADDING CASE TAGS FOR MERGING

### CREATING A CUSTOM MESSAGE WITH CASE TAGS

Open the **Case Manager Content Manager**, navigate to **Tools** and open **SMS Manager** (Figure 1):

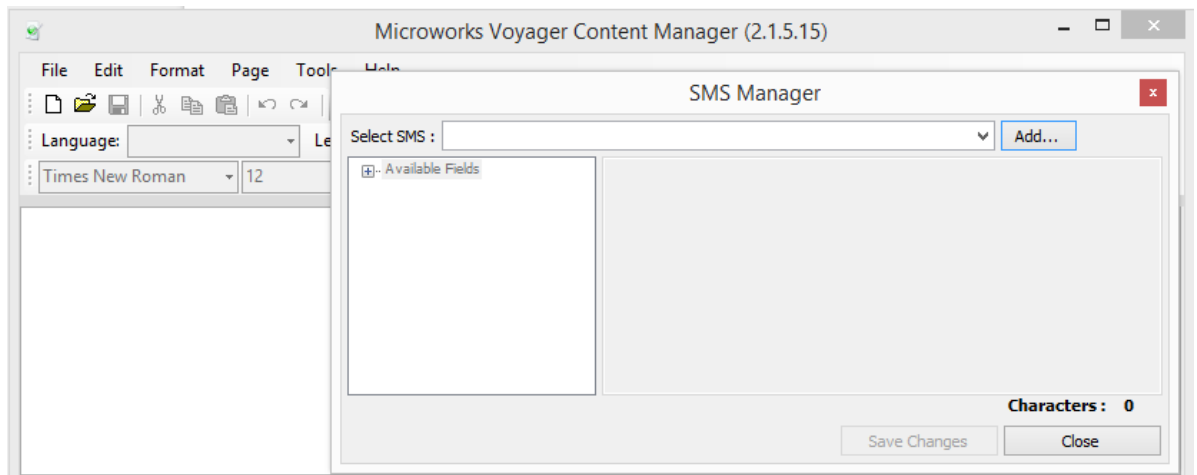


Figure 1: SMS Manager

### USE CUSTOM SMS MESSAGE

Click on the **Add** button and select “**Custom SMS Message**” from the list (Figure 2):

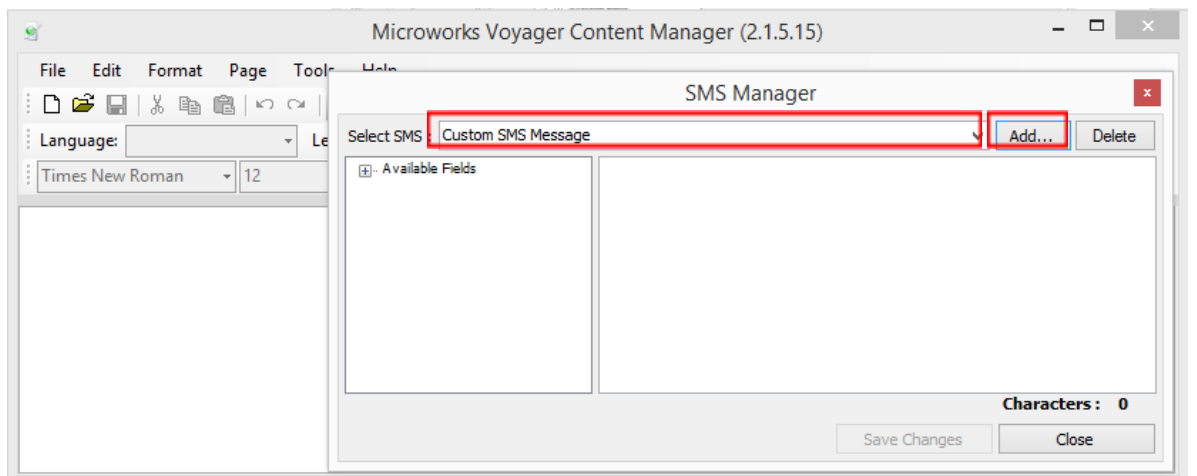


Figure 2: Custom SMS Message selection

### ADD TAGS TO A CUSTOM MESSAGE

Create the message you want to send using the tags provided in the [table](#) above (Figure 3):

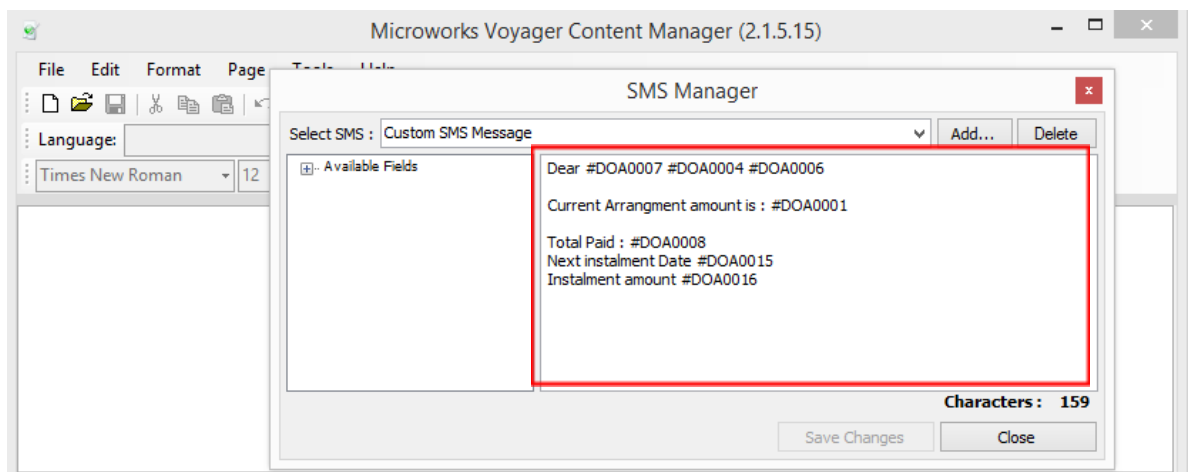


Figure 3: Custom SMS Message creation

## STEP 2: ENSURE THE MESSAGE IS CORRECT

### ARMADANETZ SMS

Ensure that the merging of information into the messages was done correctly by checking the message text in the **Send ArmadaNetz SMS** form (Figure 4):

The screenshot shows a software window titled "Send ArmadaNetz SMS". It is divided into several sections:

- Last SMS to Debtor:** Fields for "Sent On:", "Number:", "Status:", and "Template:".
- Messages Sent to Debtor:** Fields for "Total to debtor: 0" and "Last 30 days: 0", with a "Show History" button.
- SMS Templates:** A list with "Custom SMS Message" selected.
- Message Text:** A text area containing the merged message: "Dear Mr R Carstens", "Current Arrangment amount is : 200", "Total Paid : 1", "Next instalment Date 2016-02-06", and "Instalment amount 200".
- Cell Number:** A dropdown menu set to "Cellphone No." and a text field containing "0844514900".
- Buttons:** "Send" and "Close" at the bottom, and "Advanced Options..." near the cell number field.

Figure 4: Custom SMS Message case tags and merging.