

CaseFusionPro

Customer Manual — version 1.0.3

Pleasant Innovations LLC

November 2026

Table of Contents

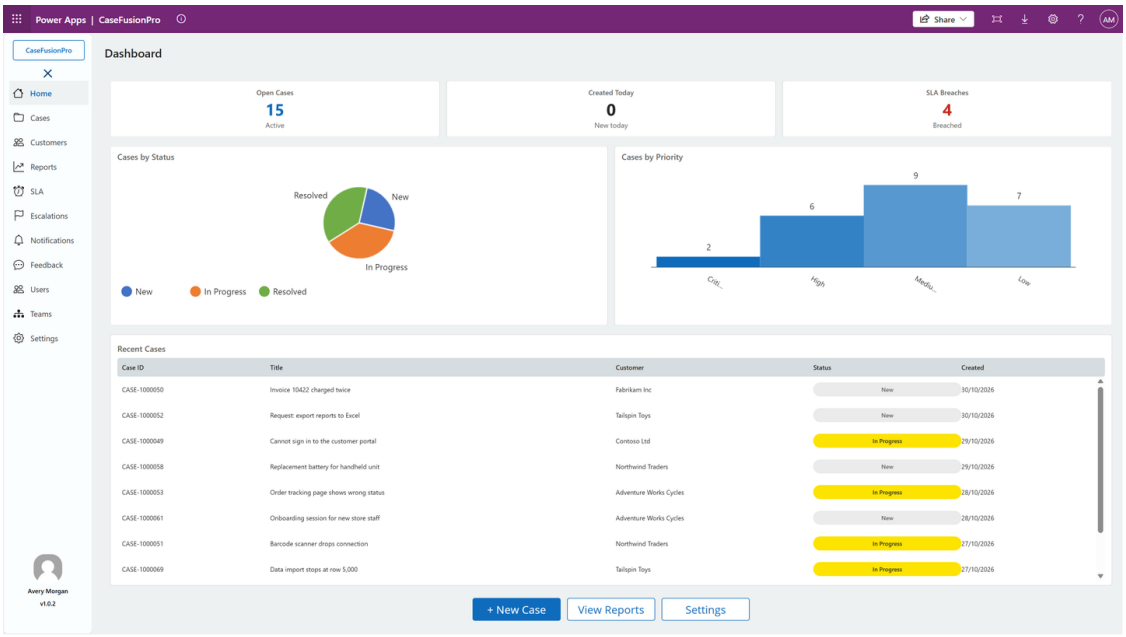
Part 1 — Getting started 2
Part 2 — Finding your way around 8
Part 3 — Daily use 12
Part 4 — Administration 27
Part 5 — Reports 39
Part 6 — Troubleshooting 41
Part 7 — Limitations and roadmap 42
Part 8 — Support 42
Appendix A — Dataverse tables 43
Appendix B — Starter data 43

This manual is for three readers: the Power Platform administrator who installs the solution (Part 1), the person who administers the app day to day (Parts 1, 4), and the agents and managers who work cases (Parts 2, 3, 5). Part 6 helps when something does not look right, Part 7 says what the product does not do yet.

Part 1 — Getting started

1.1 What CaseFusionPro is

CaseFusionPro is a support case desk that runs on your own Microsoft Dataverse environment. It gives a small support team one place to log cases, link them to customers, assign them to people and teams, watch service-level targets, escalate what gets stuck, record customer feedback and read simple reports. Everything is stored in your Dataverse tables, under your tenant's security; nothing leaves your environment.



Dashboard

The app notifies the people involved when a case is assigned, changes status or is escalated — as a push notification in Power Apps Mobile and/or an e-mail, per person (section 3.6). It does not run automatic SLA checks and sends no SLA warnings; those are planned for version 1.1 (Part 7).

1.2 Prerequisites and licensing

You need	Notes
A Power Platform environment **with Dataverse**	Production or sandbox. The solution creates 18 tables with the `pi_` prefix.
A Power Apps licence for every user	Per-user or per-app plan.
The managed solution file	`CaseFusionPro_1_0_3_0_managed.zip` (from the marketplace listing or from Pleasant Innovations).
A **Power Apps Notification V2** connection	Created once by the installing admin under **Connections** → **New connection** → *Power Apps Notification V2* → **Create** (no credentials). The import binds the app's push notifications to it; without it the app works, but phone notifications are not sent.
Someone with **System Administrator** on the environment	For the import and for assigning security roles. Nobody needs this role to *use* the app.

1.3 Install the solution

In the maker portal

1. Open **make.powerapps.com** and select the target environment.
2. Go to **Solutions** → **Import solution** → **Browse**, pick the ZIP, then **Next**. On the **Connections** step, pick your *Power Apps Notification V2* connection for **CaseFusionPro Push** (create one from that step if the list is empty), then **Import**.
3. Wait for the import to finish. Into an empty environment it takes about 10–15 minutes; the portal shows "Solution imported successfully" when done. If the page times out, check **Solutions → History** before importing again — the import usually completed.

With the Power Platform CLI (optional)

```
pac auth create --environment "https://your-org.crm.dynamics.com"
pac solution import --path CaseFusionPro_1_0_3_0_managed.zip --activate-plugi
ns --settings-file settings.json
```

where `settings.json` binds the push connection reference (`pac solution create-settings --solution-zip CaseFusionPro_1_0_3_0_managed.zip --settings-file settings.json` writes the template; fill in the connection id shown in the connection's URL under **Connections**):

```
{ "EnvironmentVariables": [],
  "ConnectionReferences": [ { "LogicalName": "pi_casefusionpropush", "Connect
ionId": "<id>", "ConnectorId": "/providers/Microsoft.PowerApps/apis/shared_po
werappsnotificationv2" } ] }
```

Updating later: importing a newer package over the installed one is an update; it keeps your data. Re-importing the same version is accepted as well.

1.4 Share the app and assign security roles

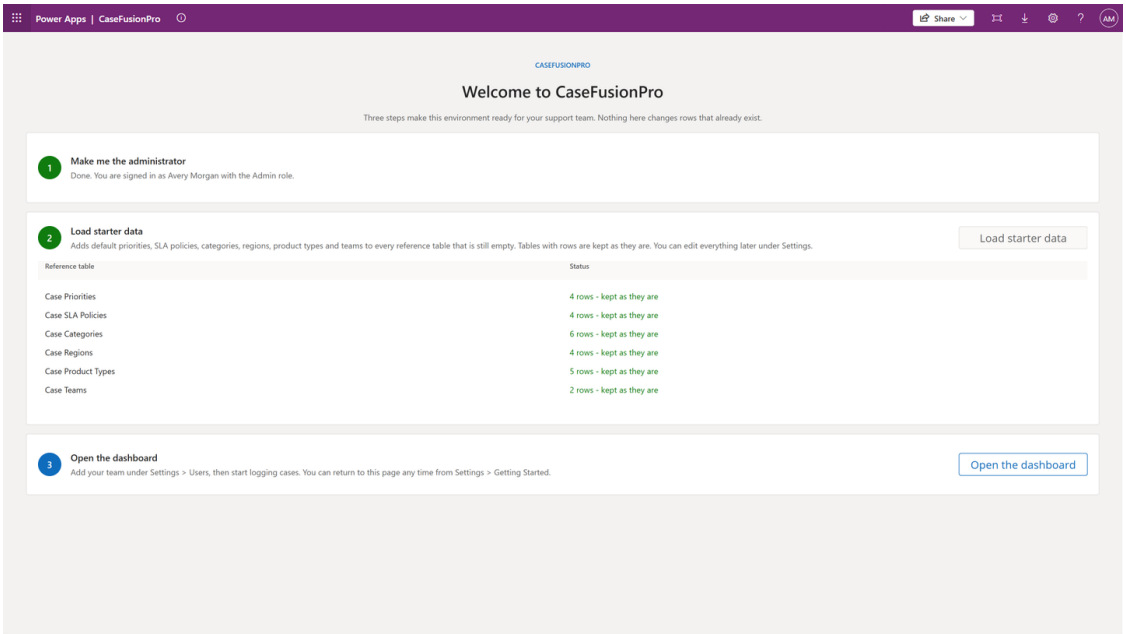
The solution ships a Dataverse security role, **CaseFusionPro User**, which grants create/read/write/delete on the CaseFusionPro tables and nothing else. Every person who uses the app needs:

1. The built-in **Basic User** role **plus CaseFusionPro User**. Assign both in the **Power Platform admin center** → environment → **Settings** → **Users + permissions** → **Users** → select the user → **Manage security roles**. Without CaseFusionPro User the app opens but every screen shows a data error.
2. The canvas app shared with them: maker portal → **Apps** → **CaseFusionPro** → **Share** → a user, a group or everyone.

What a person can *do inside the app* (which screens, which buttons) is decided by their **Case Users** row in the app, not by the Dataverse role; see 1.6 and 2.3.

1.5 First run — the Get Started page

Open the app once as the person who will administer it. The first thing every user sees is the consent dialog **“Allow CaseFusionPro to access your data?”** listing Dataverse, Power Apps Notification V2 and Office 365 Outlook — choose **Allow** (section 3.6 explains what the two connectors do; a tenant admin can pre-consent them, see the advanced configuration guide). While the app’s **Case Users** table is still empty, the app opens on the **Get Started** page instead of the dashboard. The page is offered only in that state, so a later sign-in can never promote itself.



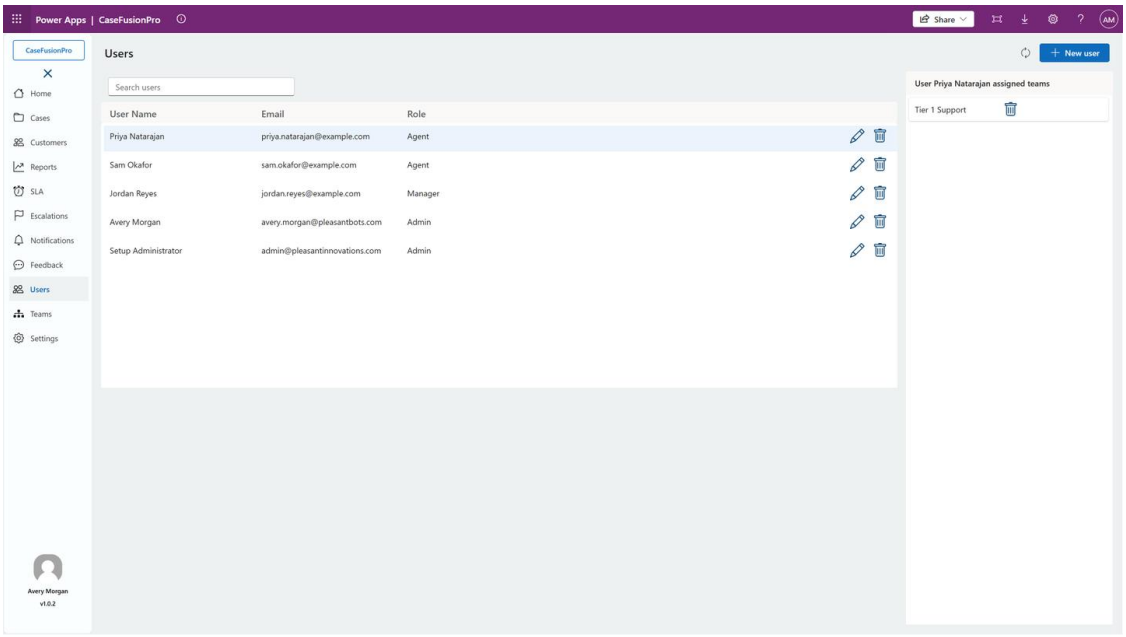
Get Started

1. **Make me the administrator** — creates your Case Users row from your sign-in (name, e-mail, role Admin). Your session becomes Admin immediately.
2. **Load starter data** — fills every reference table that is still empty with a generic set: 4 priorities, 4 SLA policies, 6 categories, 4 regions, 5 product types and 2 teams (the values are in Appendix B). Tables that already contain rows are left untouched. No customers, cases, escalations, feedback or notifications are ever created.
3. **Open the dashboard.**

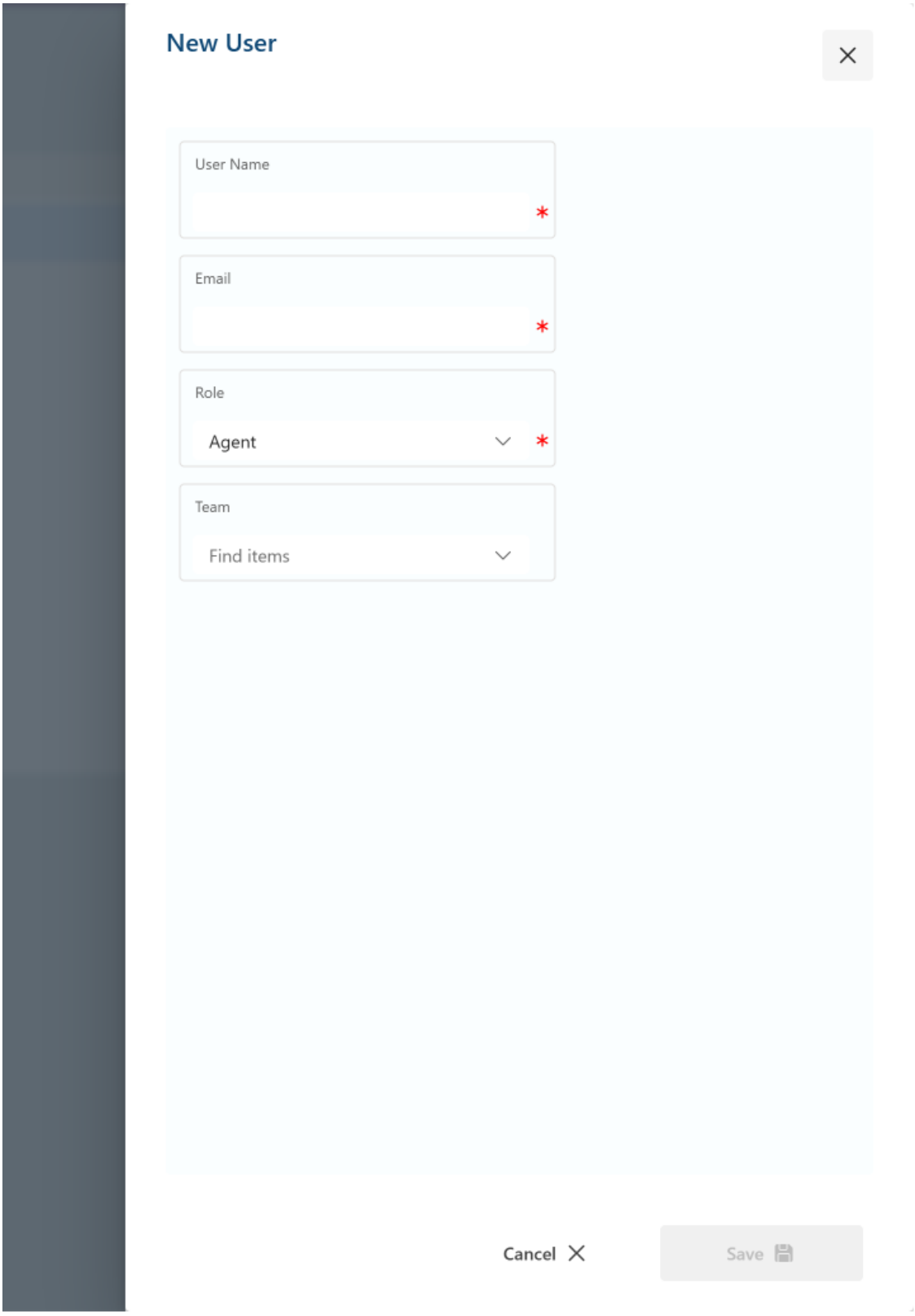
Administrators can reopen the page any time from **Settings → Getting Started**. It shows the row count of each reference table and lets you load the starter rows into a table that was emptied later.

1.6 Add your team

Every other person needs a Case Users row, created in the app under **Users** (sidebar) or **Settings → Users**, with the **New user** button:


Power Apps | CaseFusionPro
Share
AM
CaseFusionPro
Home
Cases
Customers
Reports
SLA
Escalations
Notifications
Feedback
Users
Teams
Settings
Avery Morgan
v1.0.2
Users
New user
Search users
User Name
Email
Role
Priya Natarajan
priya.natarajan@example.com
Agent
Sam Okafor
sam.okafor@example.com
Agent
Jordan Reyes
jordan.reyes@example.com
Manager
Avery Morgan
avery.morgan@pleasantbots.com
Admin
Setup Administrator
admin@pleasantinnovations.com
Admin
User Priya Natarajan assigned teams
Tier 1 Support

Users


New User
User Name
Email
Role
Agent
Team
Find items
Cancel
Save

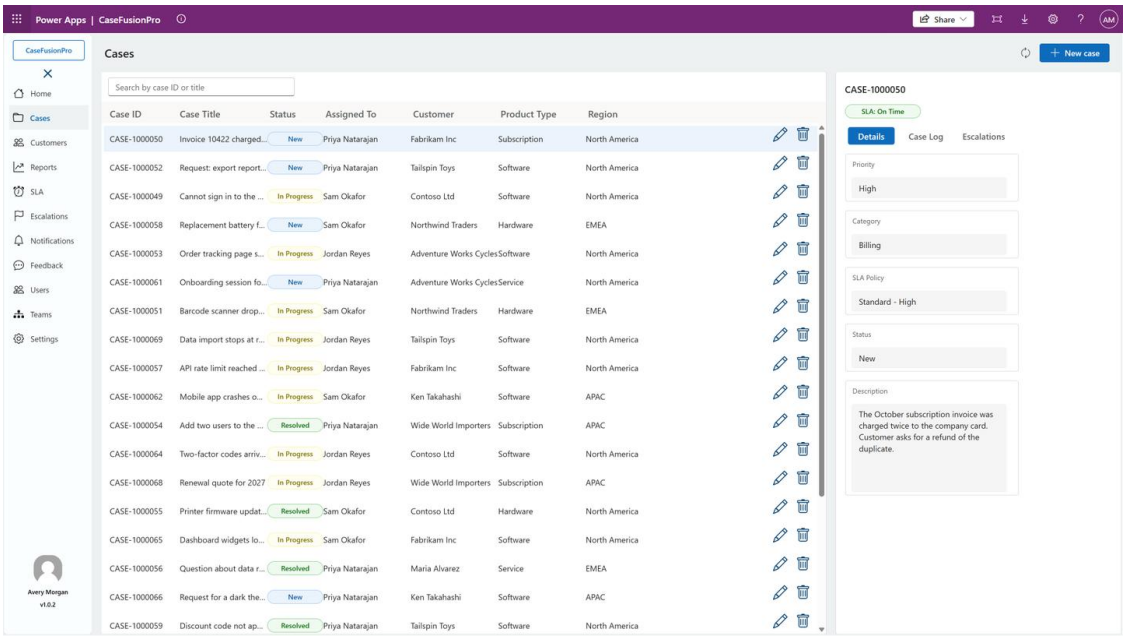
New user

- **User Name** — the display name shown in the app.
- **Email** — the e-mail of their Microsoft sign-in, spelled exactly as in Microsoft Entra. This is how the app recognises the person.
- **Role** — Admin, Manager or Agent (2.3).
- **Team** — optional; adds a team membership at the same time.

A signed-in person without a matching row sees the app read-only: no create, edit or delete buttons and no administration screens.

Part 2 — Finding your way around

2.1 The sidebar and the header



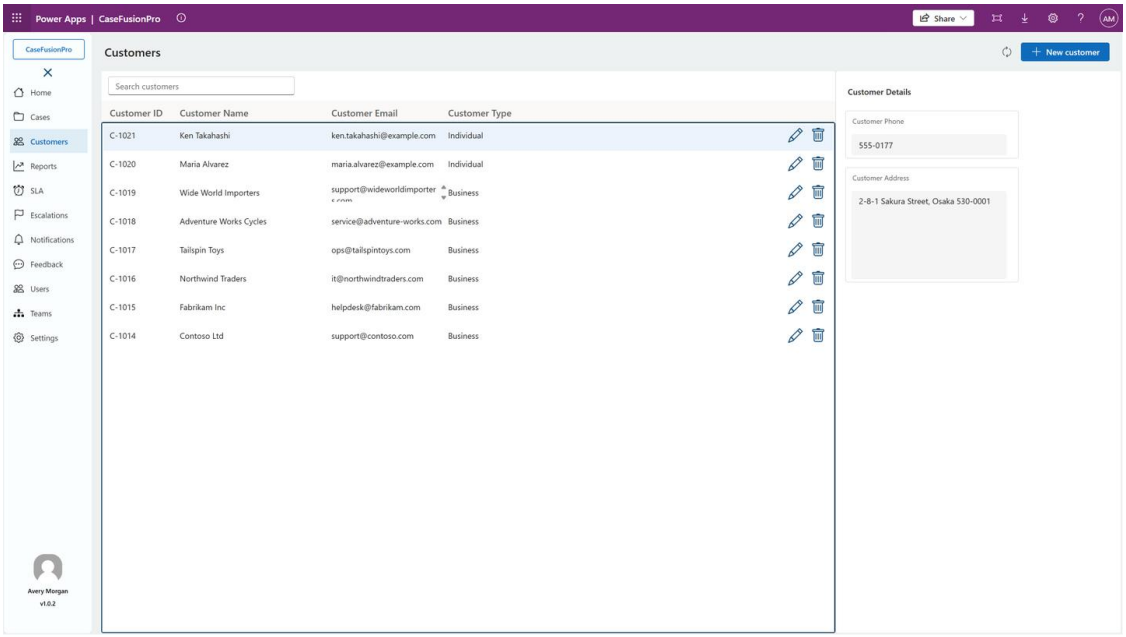
Cases list

- **Sidebar (left).** One entry per screen. Admins see eleven entries (Home, Cases, Customers, Reports, SLA, Escalations, Notifications, Feedback, Users, Teams, Settings); Managers and Agents see seven — SLA, Users, Teams and Settings are administration screens. The active screen is highlighted. The **×** collapses the sidebar to icons; the version number sits under your name at the bottom.
- **Header (top of each screen).** The screen title on the left; on the right a **refresh** icon that reloads the list from Dataverse, and a **New …** button that opens the create form (Managers and Admins only). Screens opened from Settings also have a **Back** button.
- **Search box** above every list: type to filter the list as you go; clear it to see everything again.

- **Power Apps bar** (the thin bar above the app) belongs to Microsoft: it has Share, full-screen and the account menu. Ignore its gear icon — the app's own settings are the **Settings** entry in the sidebar.

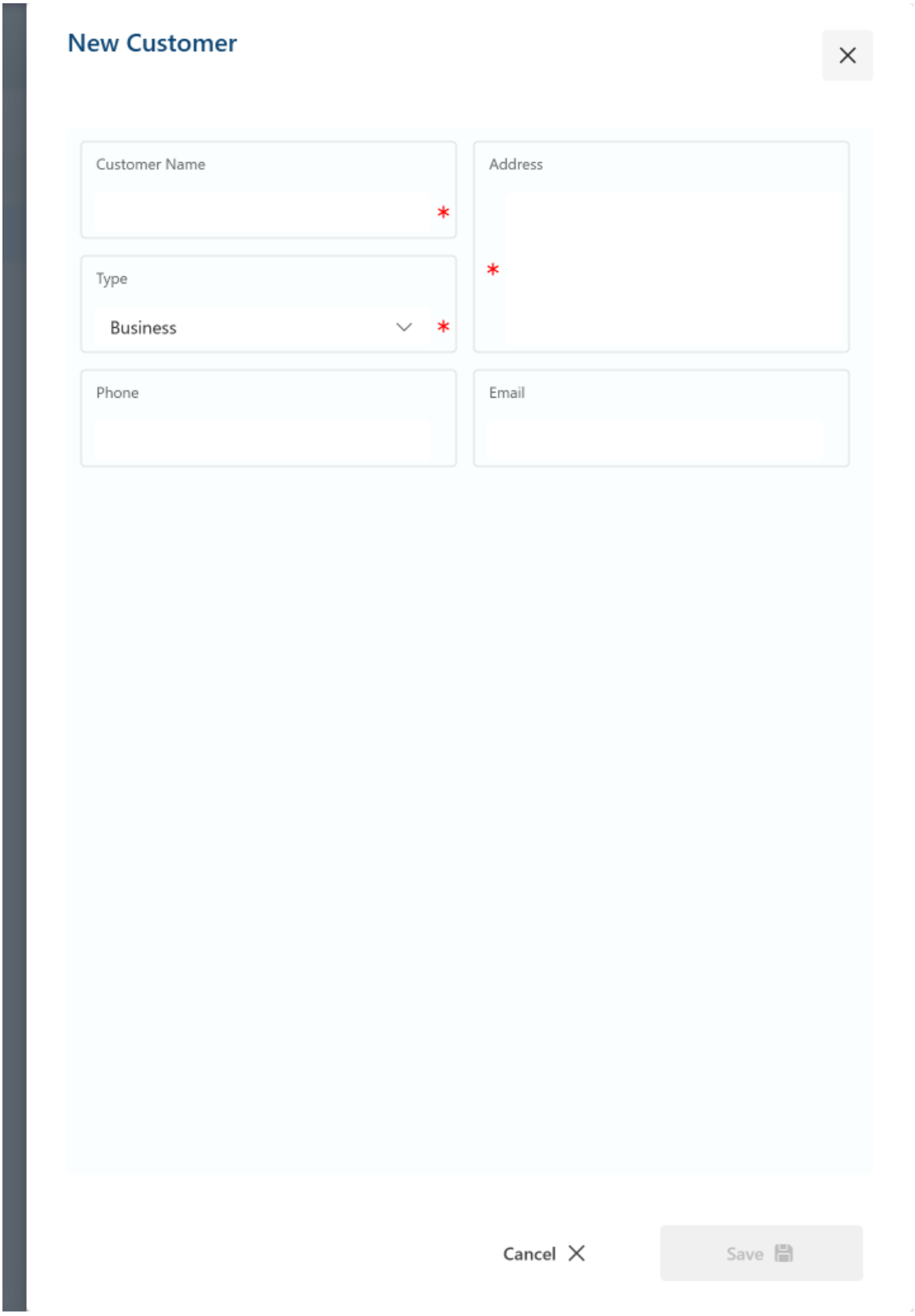
2.2 The screen pattern

Every working screen looks the same, so once you know one you know them all:



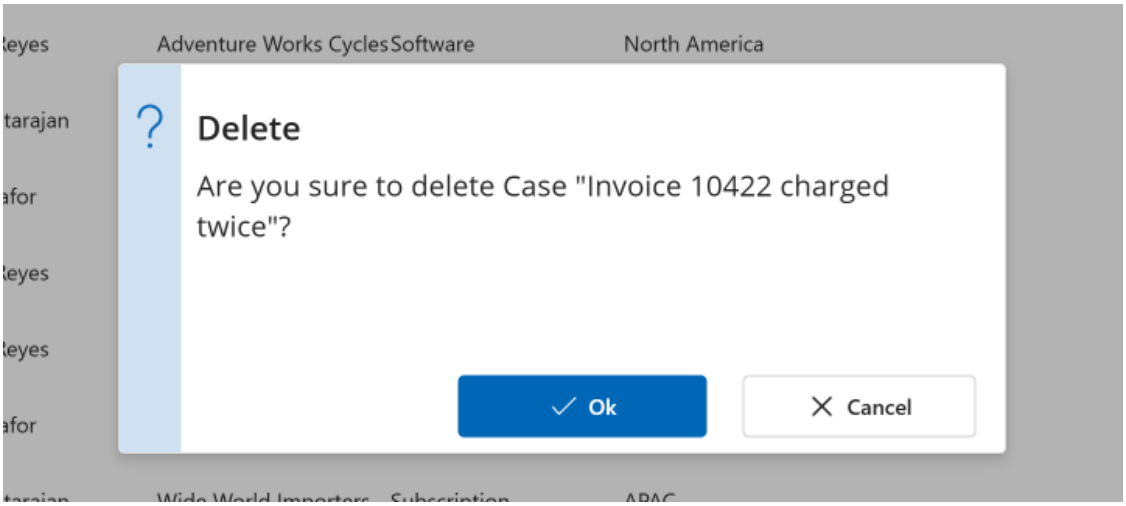
Customer detail

- **List on the left.** Click a row to select it. Managers and Admins also see a **pencil** (edit) and a **trash can** (delete) at the right end of each row.
- **Detail panel on the right.** Shows the selected record in full. Some panels have tabs (Cases) or a sub-list (Teams, Users).
- **Forms** slide in from the right for **New** and **Edit**. Fields marked with a red asterisk are required; **Save** stays disabled until they are filled. **Cancel** or the **×** closes the form without saving.



New customer

- **Delete** asks for confirmation. **Ok** deletes, **Cancel** keeps the record.



Delete dialog

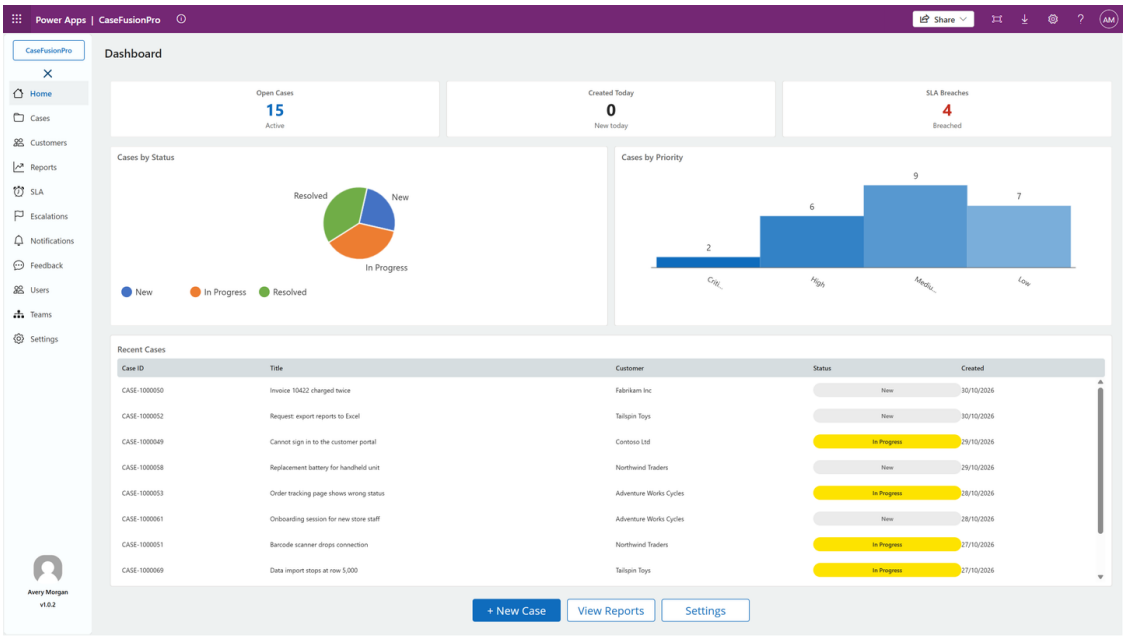
2.3 Roles at a glance

Role	Screens	Can do
Admin	Everything, including SLA, Users, Teams, Settings	Create, edit and delete on every screen; manage users and reference data
Manager	Home, Cases, Customers, Reports, Escalations, Notifications, Feedback	Create, edit and delete cases, customers, escalations, feedback; update notifications
Agent	The same seven screens	Read only: search, select, read details and reports
No Case Users row	The same seven screens	Read only

Administration screens are hidden from non-admins, not locked: a person who opens one through a direct link can see it, but Dataverse still governs the data and the buttons stay hidden.

Part 3 — Daily use

3.1 Dashboard



Dashboard

The dashboard is the landing page for everyone.

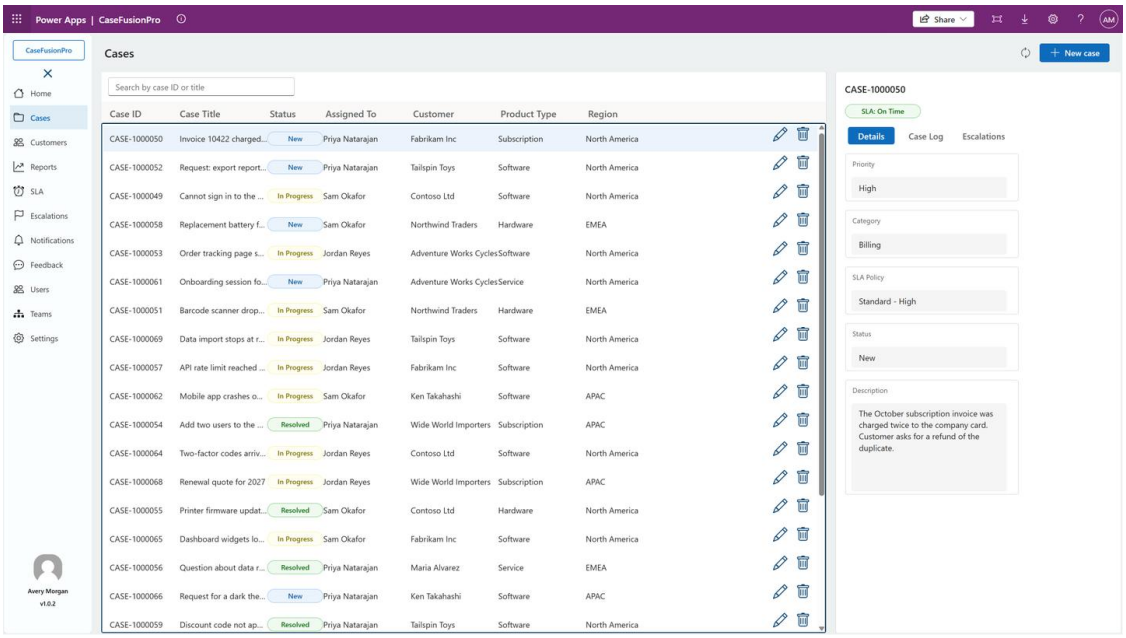
Area	What it shows
Open Cases	Cases whose status is not Resolved
Created Today	Cases created today
SLA Breaches	Cases flagged **SLA Breach Occurred = Yes**
Cases by Status / Cases by Priority	Pie and column chart of all cases
Recent Cases	The newest cases; click a row to open it on the Cases screen
Quick links	**+ New Case** (Managers, Admins), **View Reports**, **Settings** (Admins)

3.2 Cases

The Cases screen is where the team spends its day.

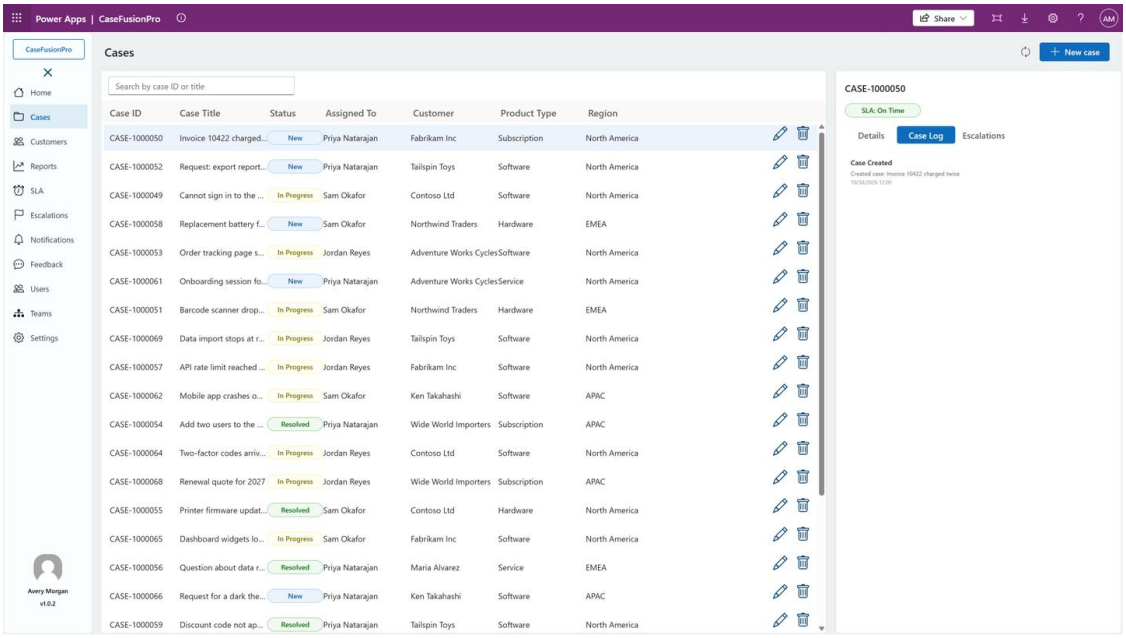
The list. Columns: Case ID, Title, Status (badge: New blue, In Progress yellow, Resolved green), Assigned To, Customer, Product Type, Region. The search box matches the case ID and the title.

The detail panel has the SLA badge at the top (On Time green, At Risk orange, Breached red) and three tabs:



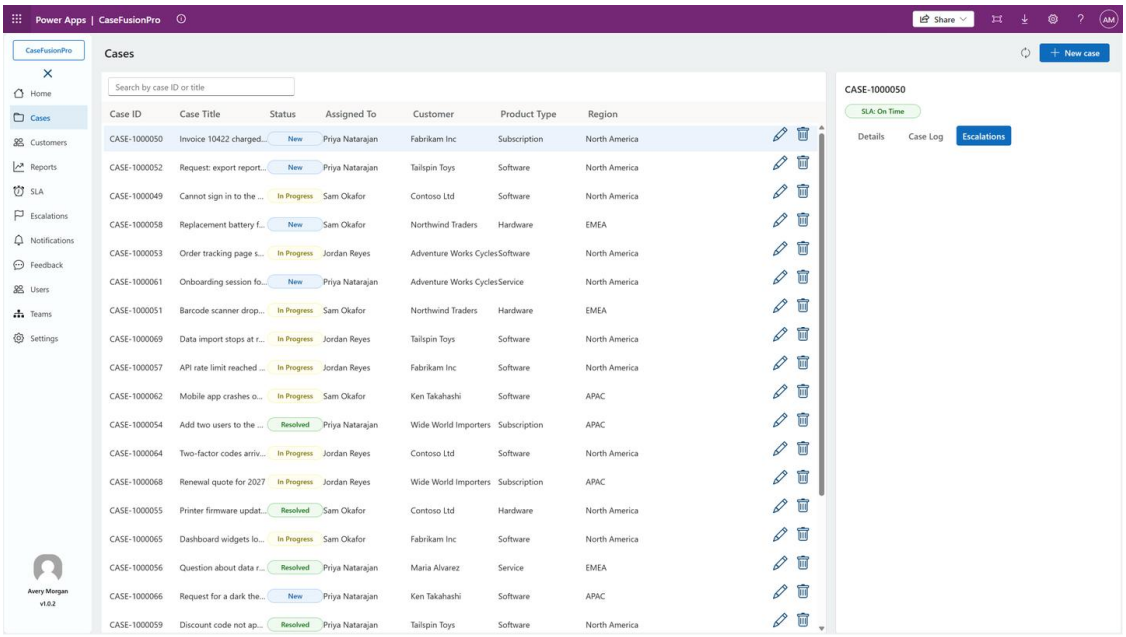
Case detail

- **Details** — priority, category, SLA policy, status and description.
- **Case Log** — the audit trail: every create, update and delete of the case and of its escalations, with who did it and when.



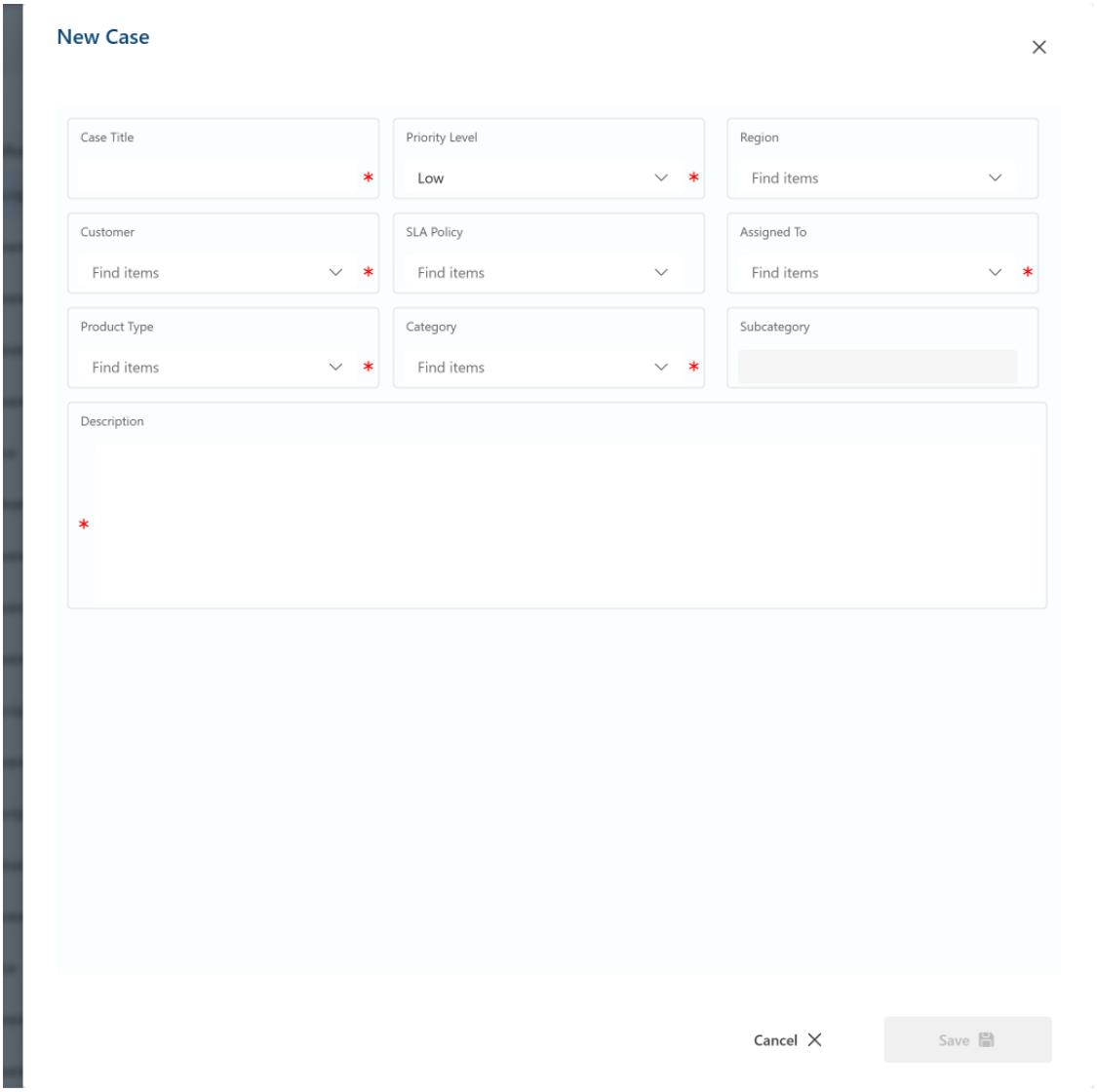
Case Log tab

- **Escalations** — the escalations raised for this case.



Escalations tab

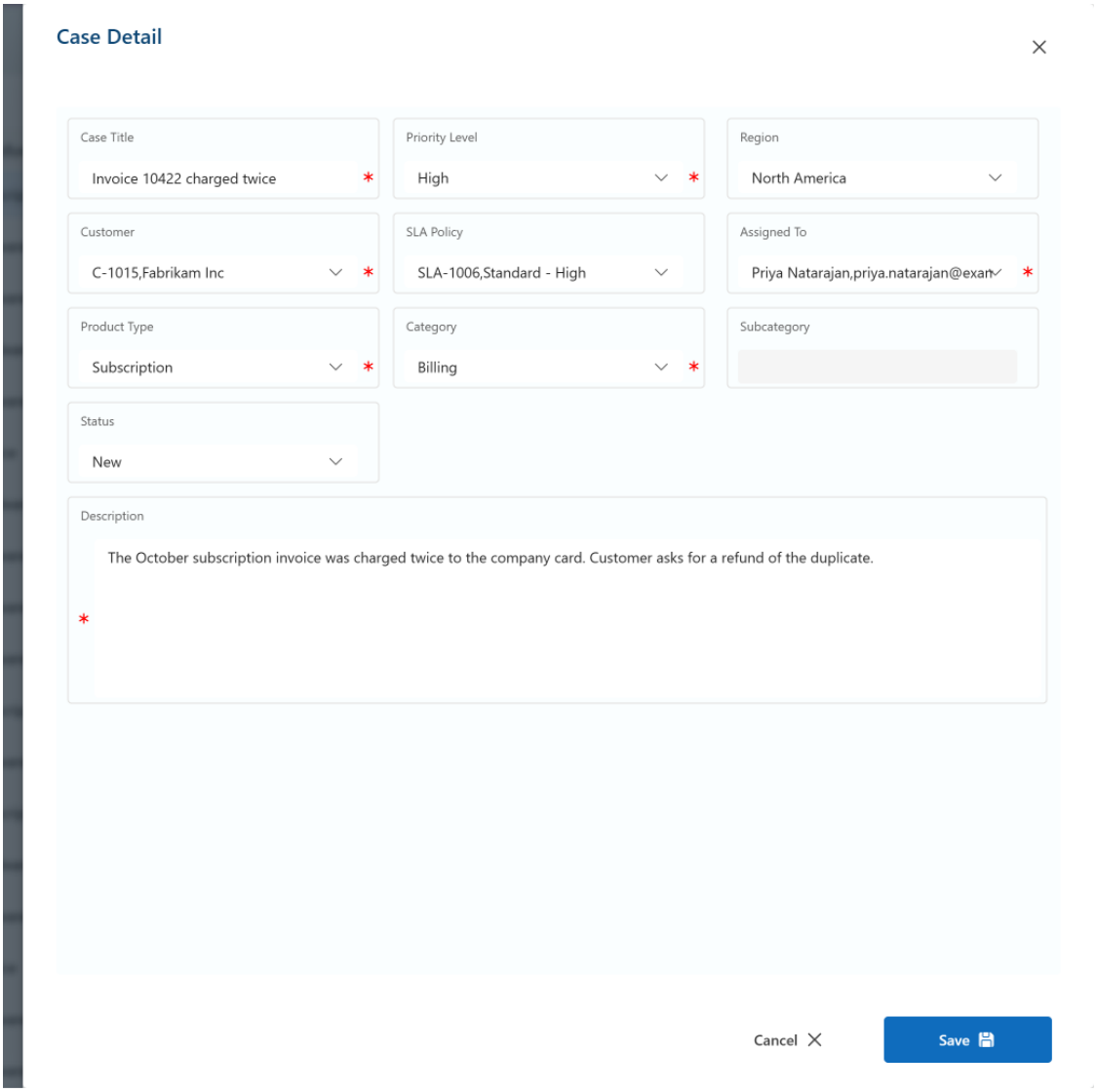
Create a case (Managers, Admins): **New case** in the header, or **+ New Case** on the dashboard.



New case

Required: Case Title, Priority Level, Customer, Assigned To, Product Type, Category, Description. Optional: Region, SLA Policy, Subcategory. On **Save** the case gets the next case number, status **New**, SLA status **On Time**, a “Case Created” entry in its Case Log and an SLA log entry.

Edit a case: the pencil on the row.



Edit case

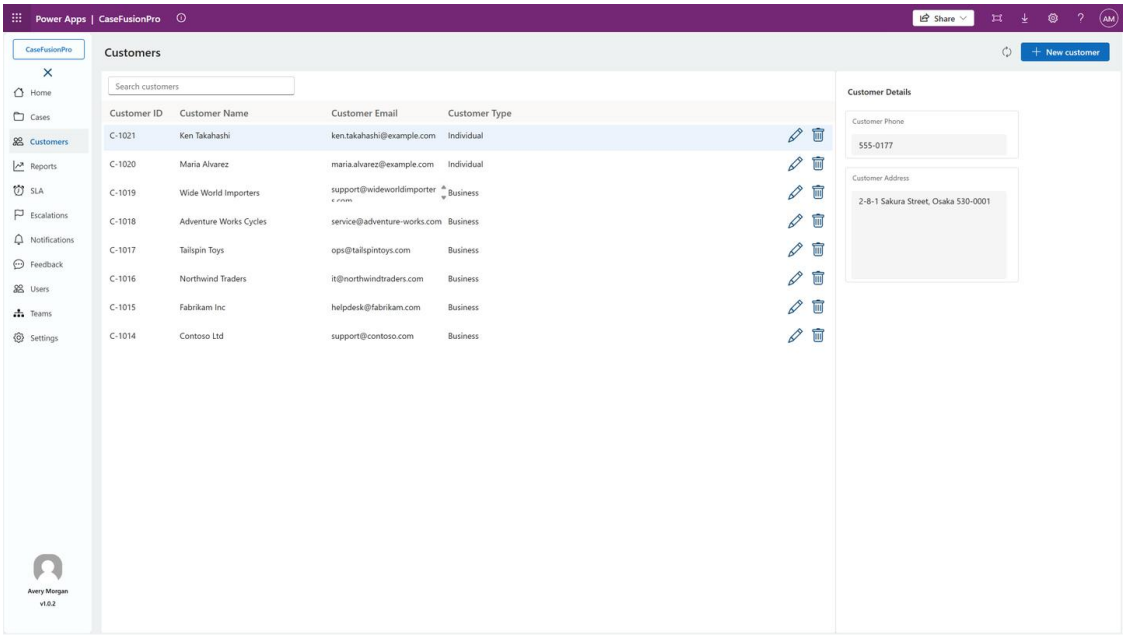
The form is the same as for a new case plus **Status**. The status list offers only the allowed next steps:

From	To
New	In Progress
In Progress	Resolved
Resolved	In Progress (reopen)

Every save writes a “Case Updated” entry to the Case Log.

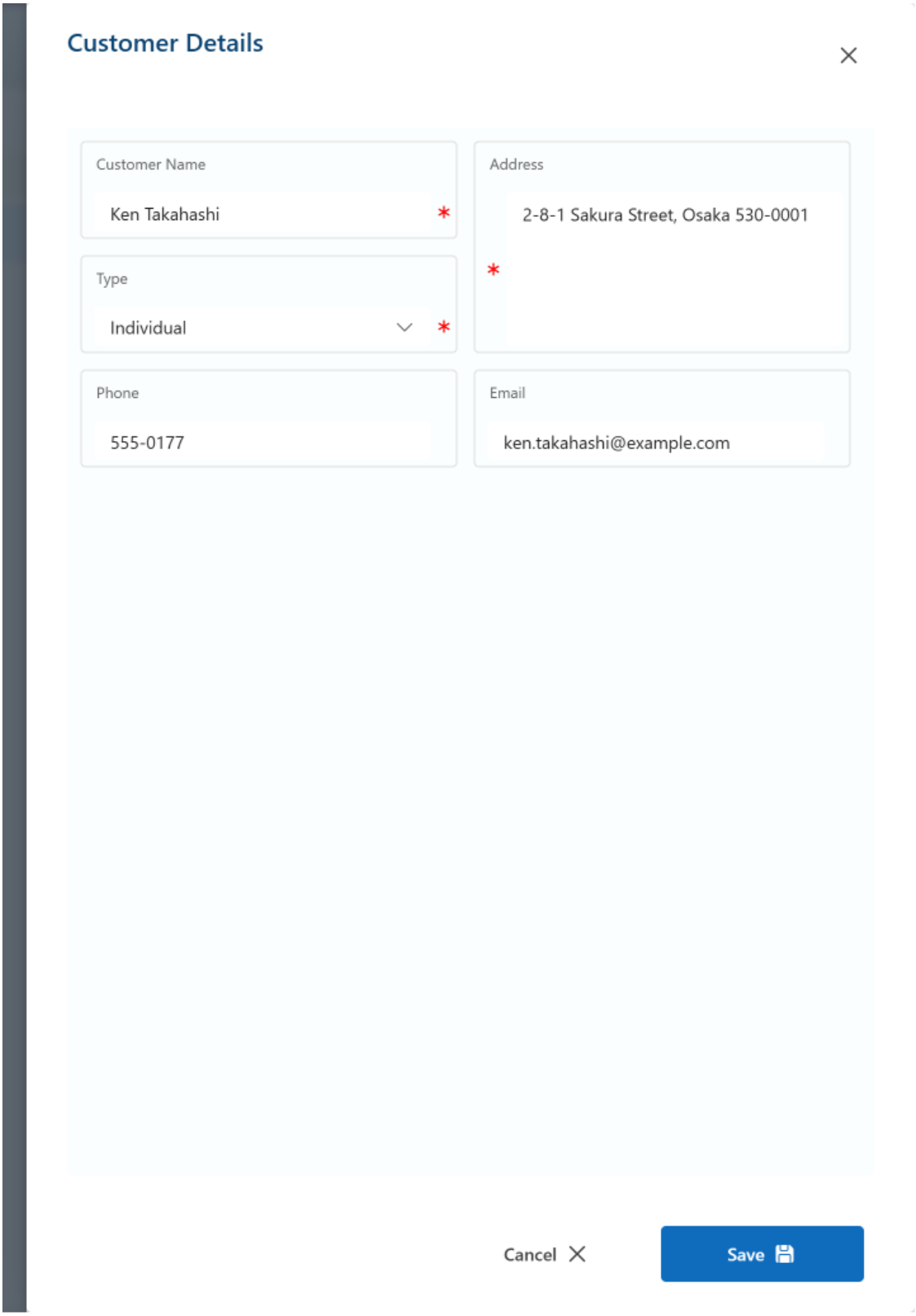
Delete a case: the trash can, then **Ok** in the dialog. The deletion is written to the log before the case is removed. A case with escalations, feedback or log entries is deleted together with them.

3.3 Customers



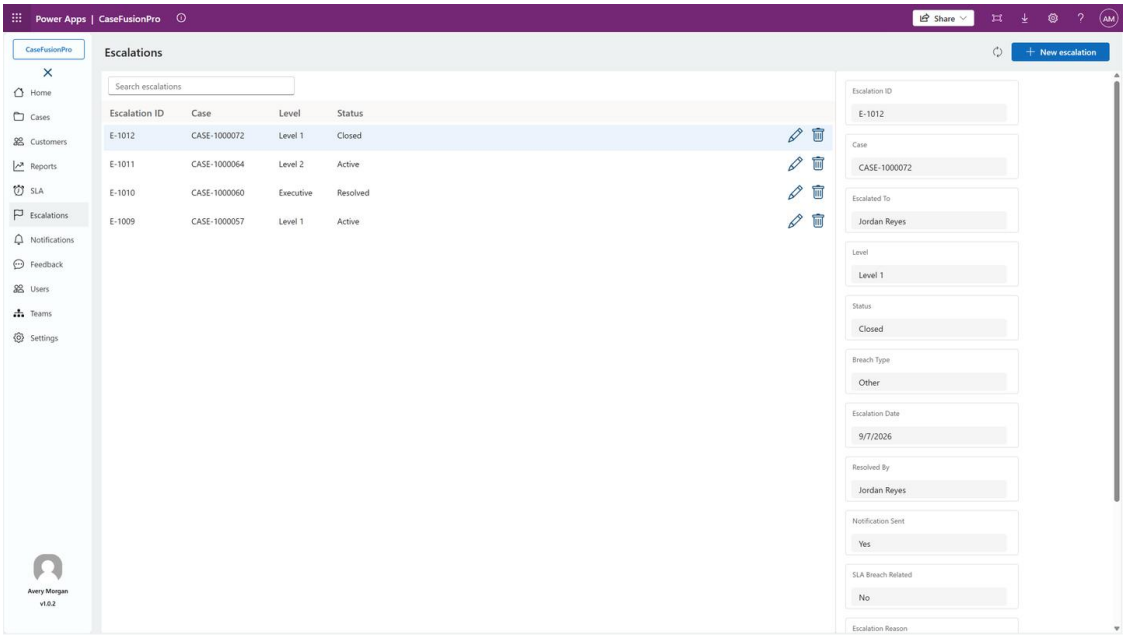
Customers

A customer is a company or a person a case belongs to. Fields: Full Name, Type (Business or Individual), Email, Phone, Address. The customer ID is assigned automatically. Search matches name and e-mail. Create and edit with the usual forms; a customer with cases should be kept, not deleted.



Edit customer

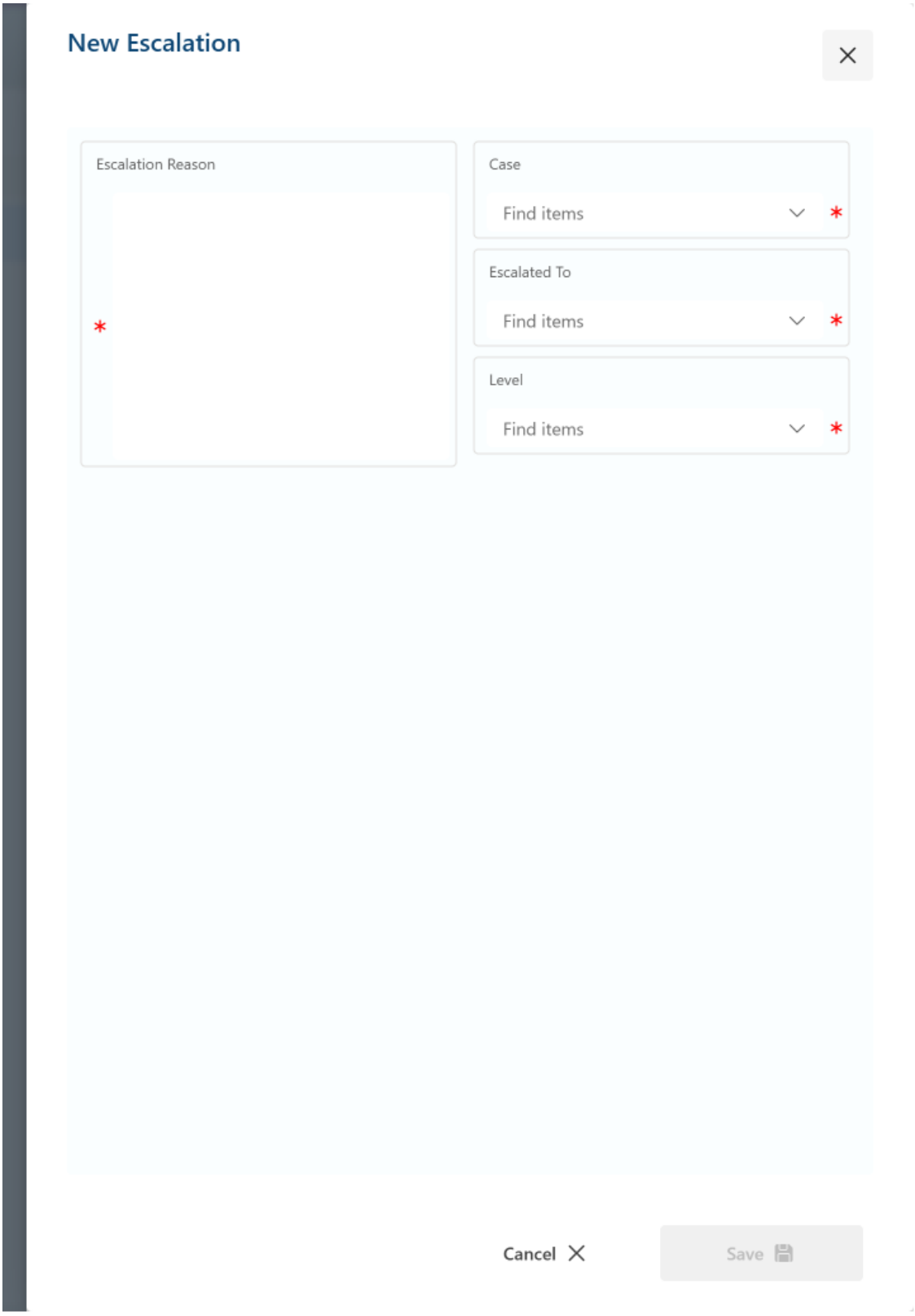
3.4 Escalations



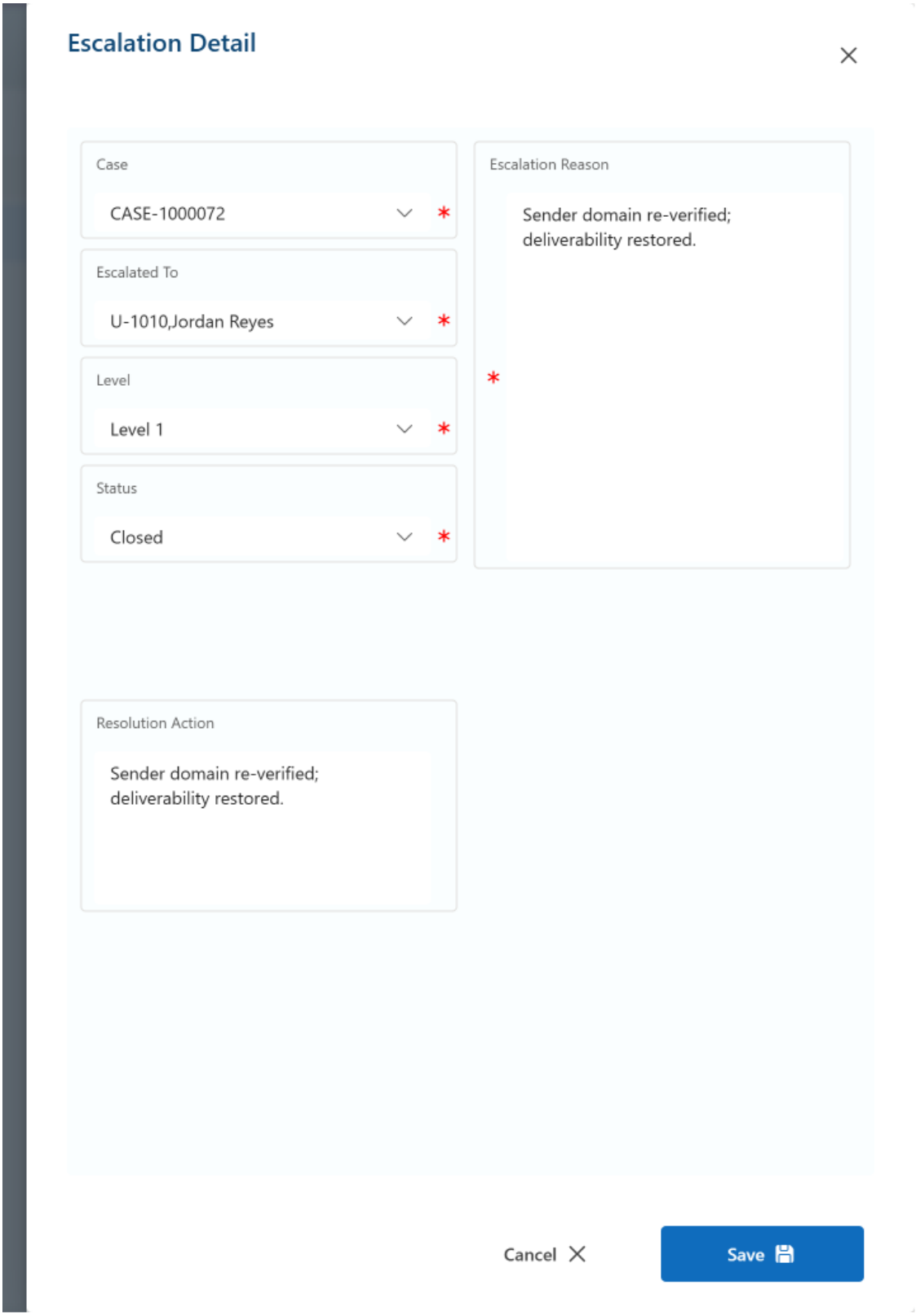
Escalations

Raise an escalation when a case needs someone else's attention. Each escalation belongs to one case and names the person it is escalated to.

Field	Values
Level	Level 1, Level 2, Executive
Status	Active, Resolved, Closed
Escalation Reason	free text, required
Resolution Action	free text, filled when the escalation is resolved



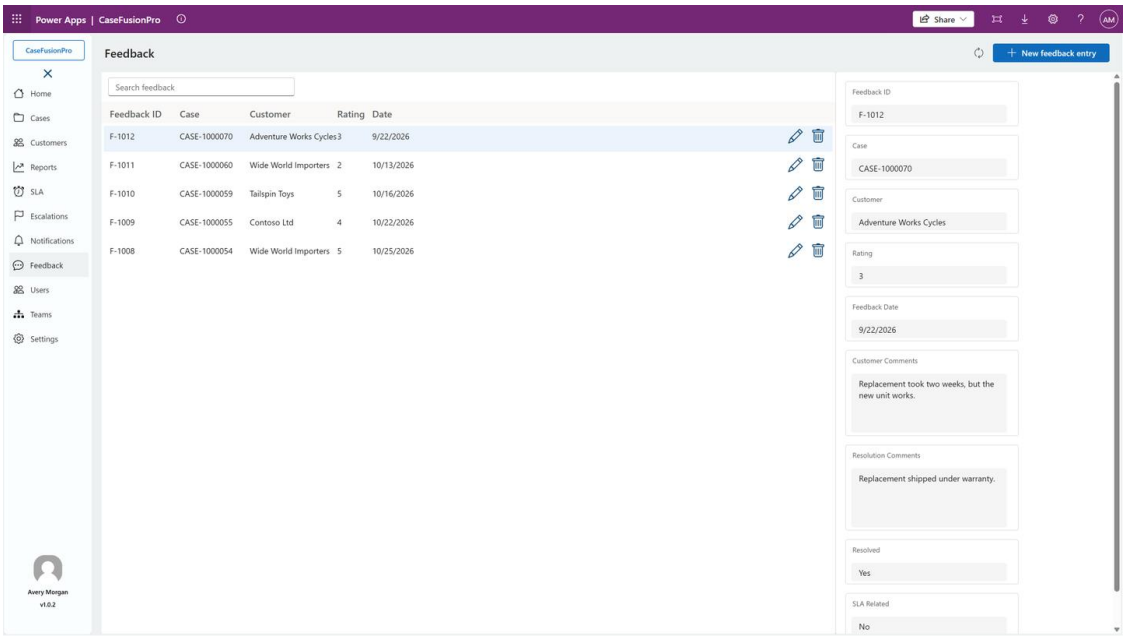
New escalation



Edit escalation

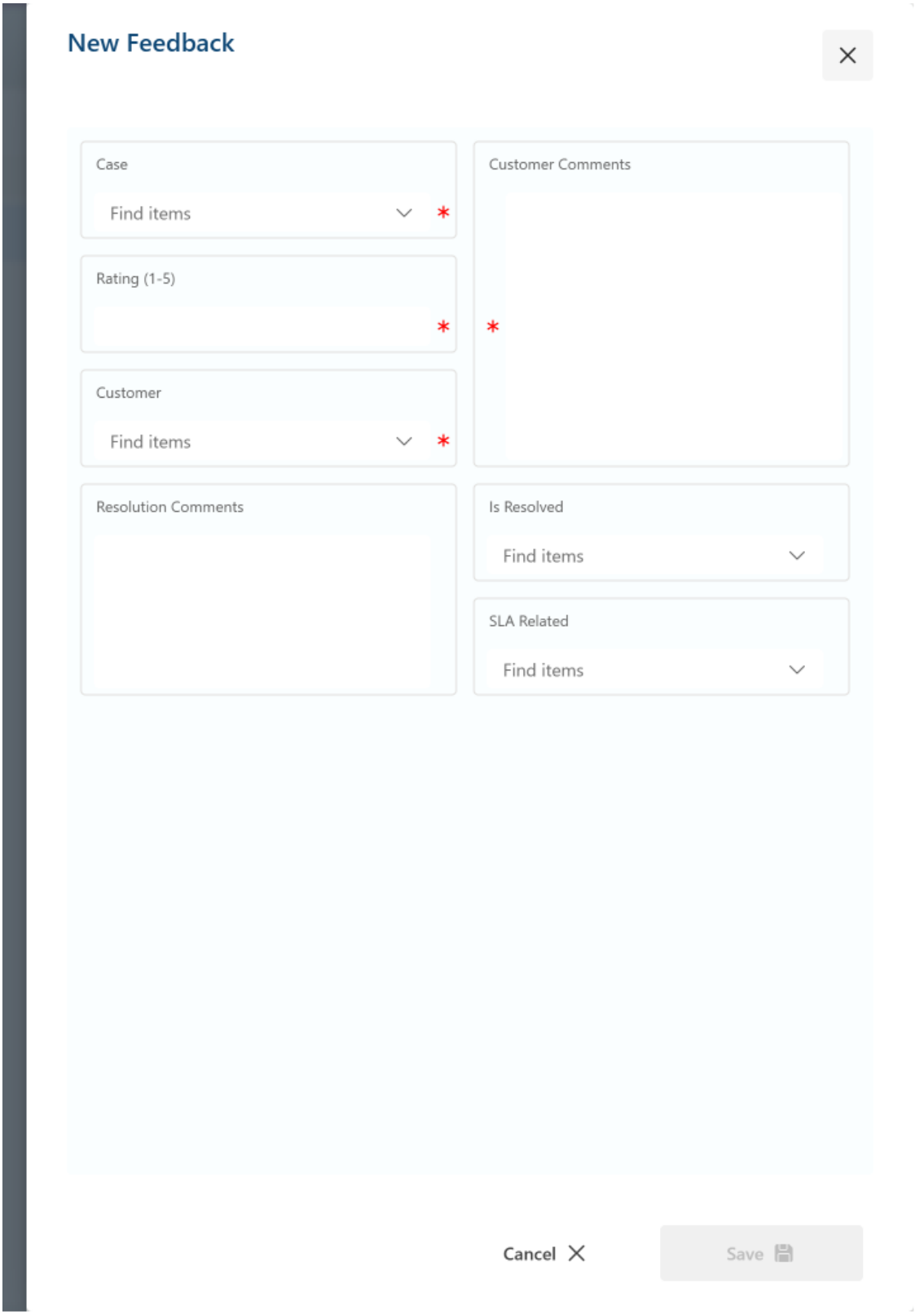
Creating, updating or deleting an escalation also writes an entry to the case's Case Log, flagged as an escalation. The Cases screen shows the escalations of the selected case on its **Escalations** tab (3.2).

3.5 Feedback

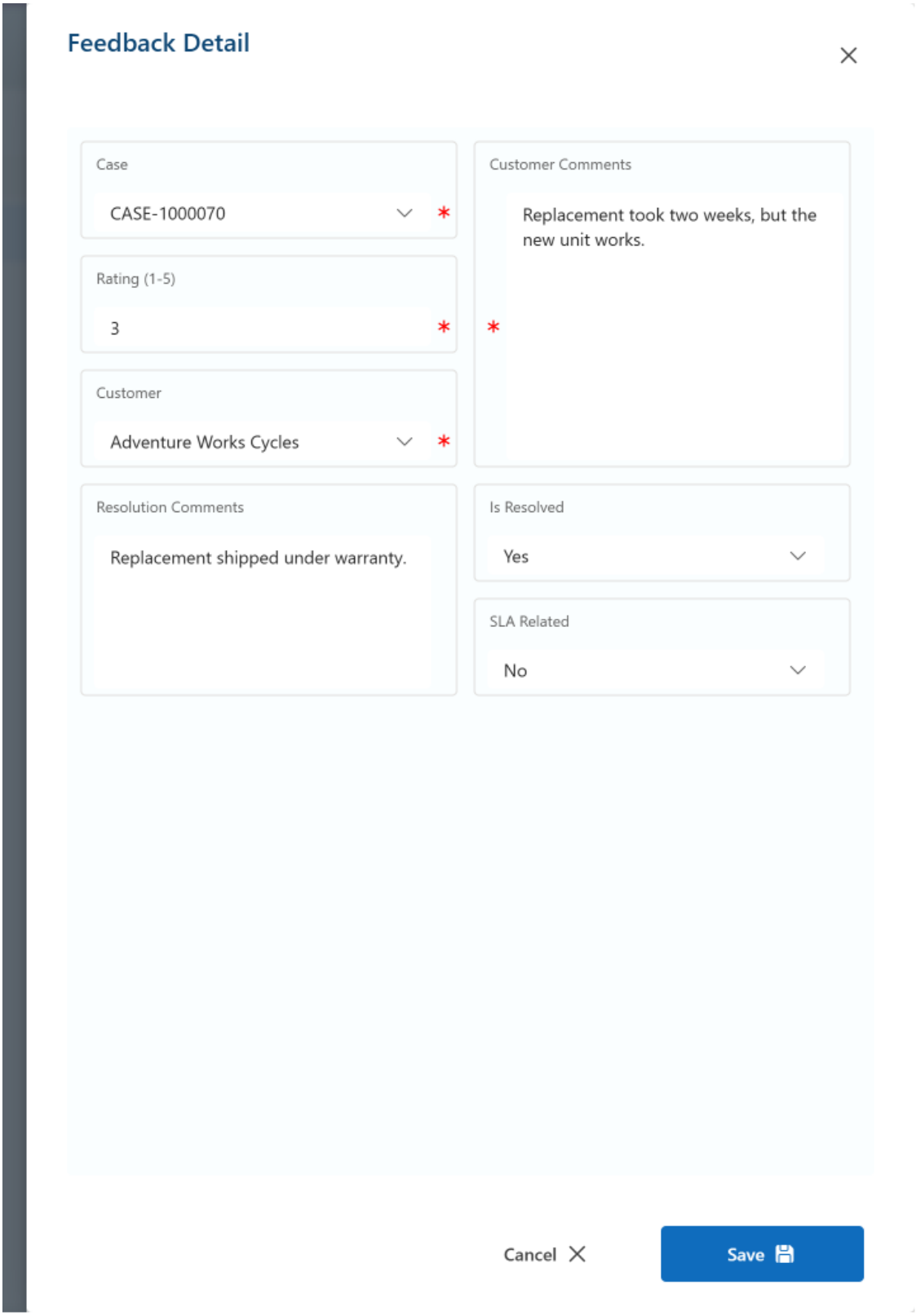


Feedback

Record what the customer said about a case: the case, the customer, a **rating from 1 to 5**, the customer's comments, whether the matter is resolved, resolution comments and whether the feedback is SLA-related.



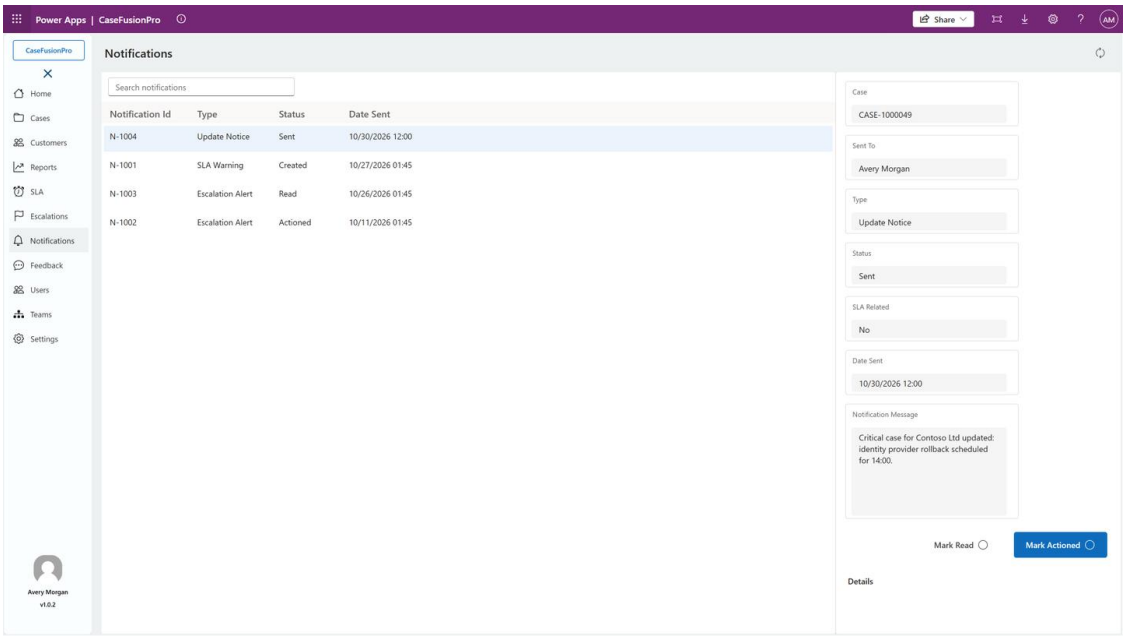
New feedback



Edit feedback

The rating must be a whole number from 1 to 5; **Save** stays disabled otherwise.

3.6 Notifications



Notifications

Notifications are messages about a case addressed to a user: type (Update Notice, Escalation Alert; SLA Warning is reserved for version 1.1), status (Created, Sent, Read, Actioned), the message and the date. The app writes one when:

Event	Type	Who receives it	Message
A case is saved with an assigned user, or the assigned user changes	Update Notice	the assigned user	`CASE-1007 assigned to you: <title>`
A case changes status	Update Notice	the assigned user	`CASE-1007 is now In Progress`
An escalation is raised	Escalation Alert	the person it is escalated to	`CASE-1007 escalated to you (Level 2): <reason>`
An escalation is resolved or closed	Escalation Alert	the case's assigned user	`Escalation E-1002 on CASE-1007 resolved`

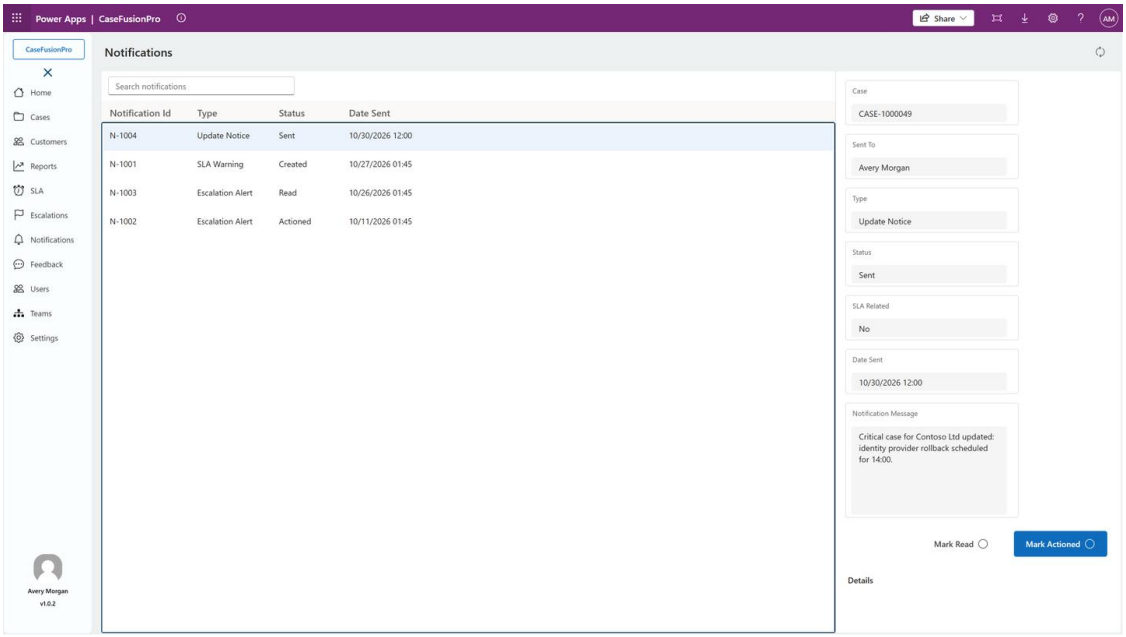
Nobody is notified about their own change. Each notification is also **delivered** according to the recipient's two switches on their Case Users row (Settings > Users, *Notify on mobile* and *Notify by e-mail*, both on by default): a push notification in **Power Apps Mobile** and/or an **e-mail** sent from the mailbox of the person who made the change. The status shows

Sent when at least one delivery succeeded and *Created* when none did; a failed delivery never blocks the save — the person saving sees a warning instead.

Phone notifications need Power Apps Mobile on the phone, signed in with the same work account, CaseFusionPro opened once in it and notifications allowed in the phone's settings (on Android, exclude Power Apps from battery optimisation). Tapping a notification opens Power Apps Mobile; open CaseFusionPro there and find the case in this screen — the notification does not jump to the case itself.

First launch: because the app can send e-mail and push notifications on your behalf, Power Apps asks every user once to allow it ("Allow CaseFusionPro to access your data?") — choose **Allow**. The dialog returns whenever the app's connectors change.

The screen is read-only except for the two status buttons on the detail panel:

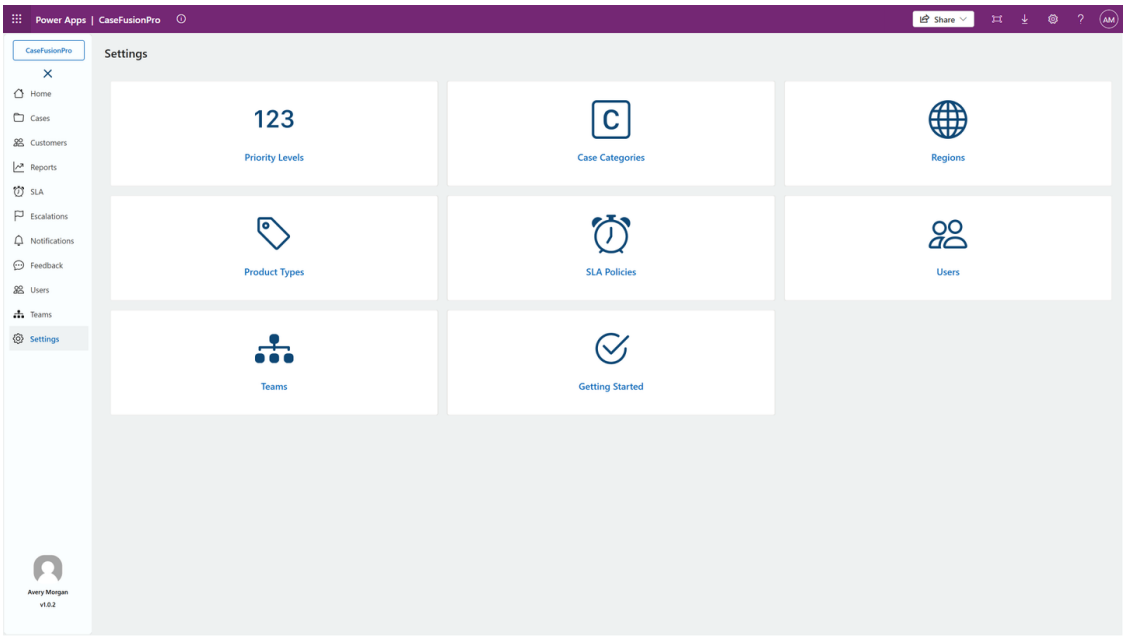


Notification detail

- **Mark Read** — status Read.
- **Mark Actioned** — status Actioned.

Part 4 — Administration

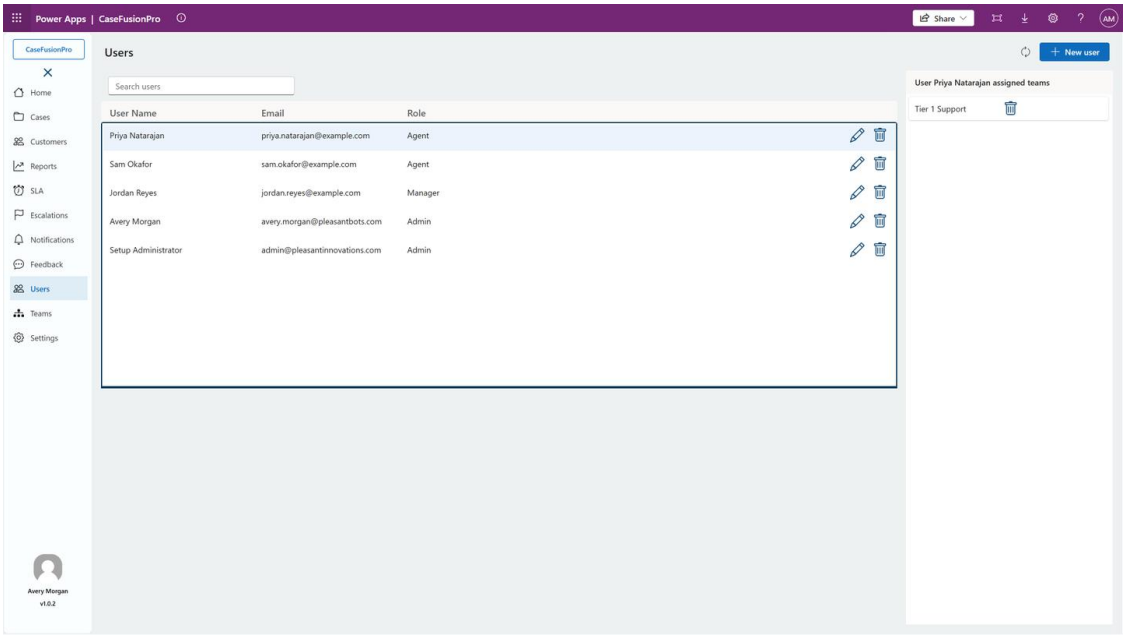
4.1 Settings hub



Settings

Settings (Admins only) is a page of tiles: Priority Levels, Case Categories, Regions, Product Types, SLA Policies, Users, Teams and Getting Started. Each opens the corresponding screen; **Back** in the header returns here.

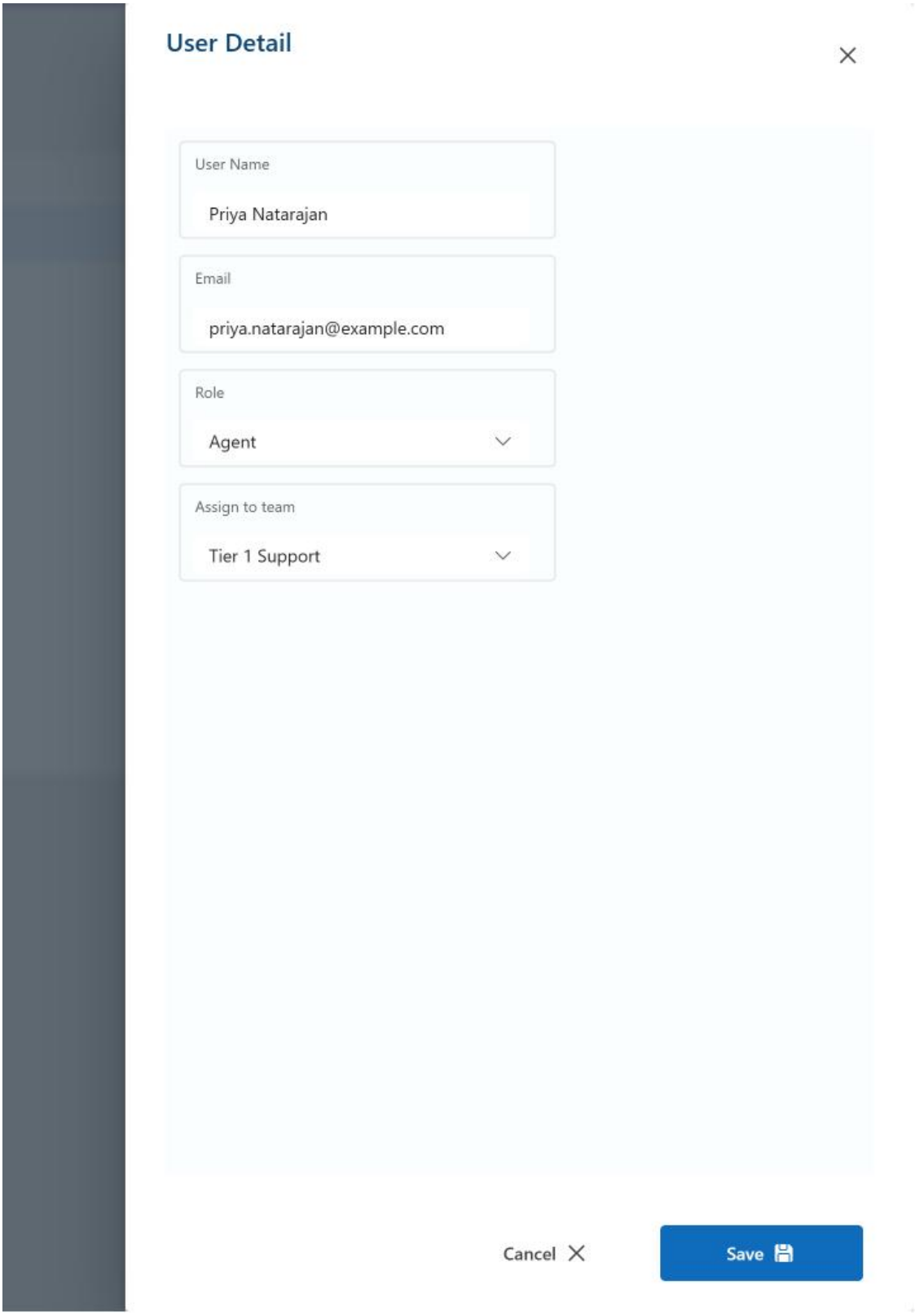
4.2 Users and roles



User detail

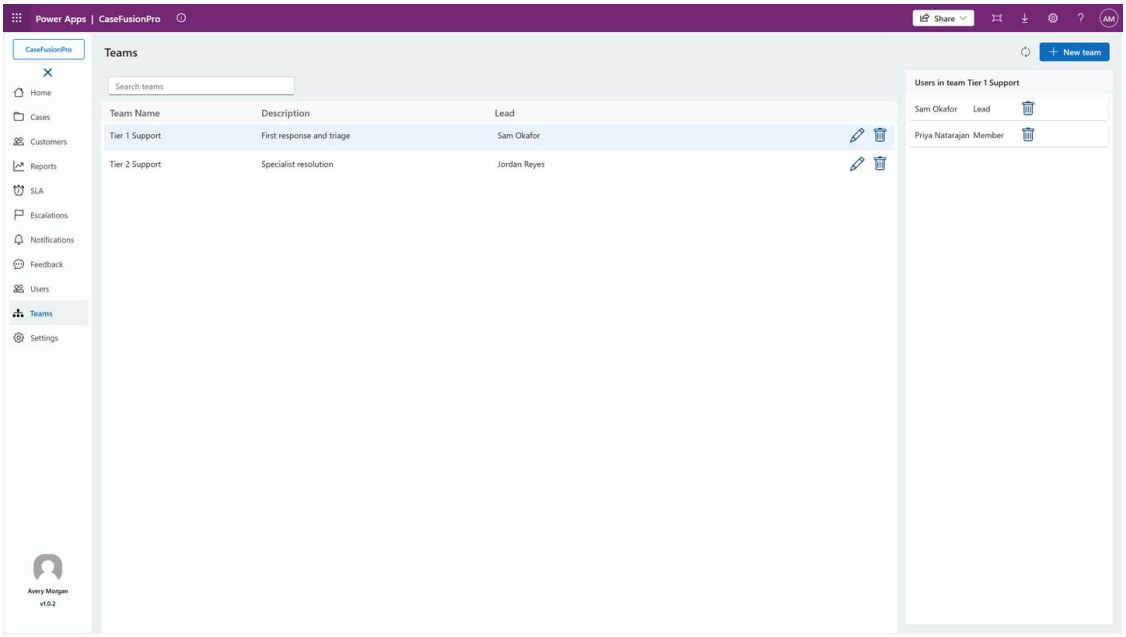
The Users screen lists every Case Users row with name, e-mail and role; the detail panel shows the user's teams, where a membership can be removed with the trash can.

- **Change a role:** pencil → **Role** → Save. The change applies the next time the person opens the app.
- **Someone leaves:** delete their row. They keep access to the app only if the app is still shared with them, and then read-only. Remove the Dataverse roles and the share as well.
- **Someone cannot see any buttons:** compare the **Email** on their row with their sign-in address; the two must match exactly.


User Detail
User Name
Priya Natarajan
Email
priya.natarajan@example.com
Role
Agent
Assign to team
Tier 1 Support
Cancel
Save

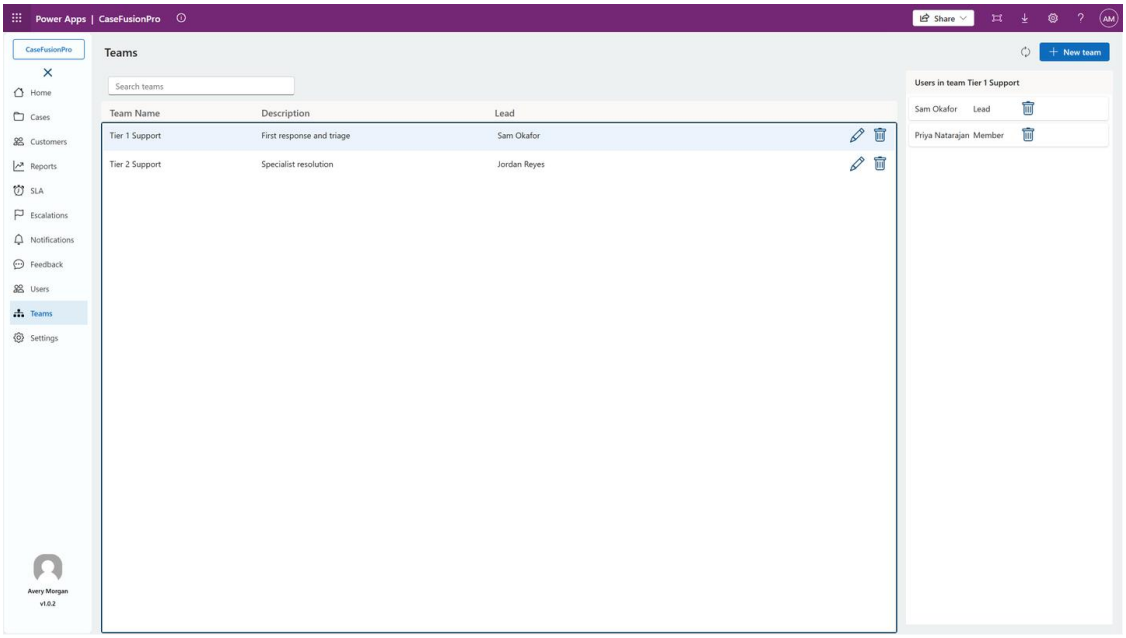
Edit user

4.3 Teams and memberships



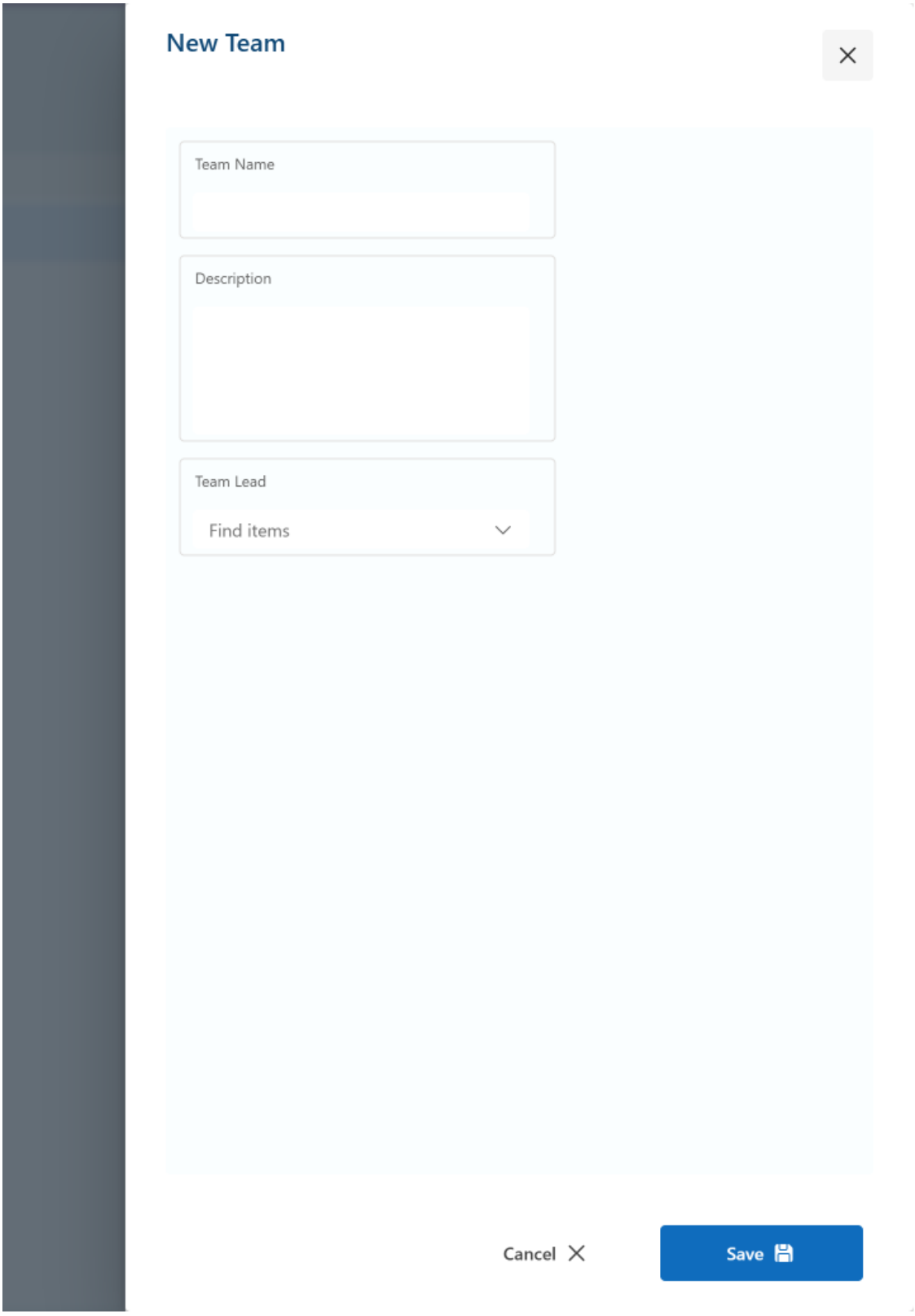
Teams

A team has a name, a description and a **lead**. The detail panel lists the members with their role in the team (Lead or Member); the trash can removes a membership.



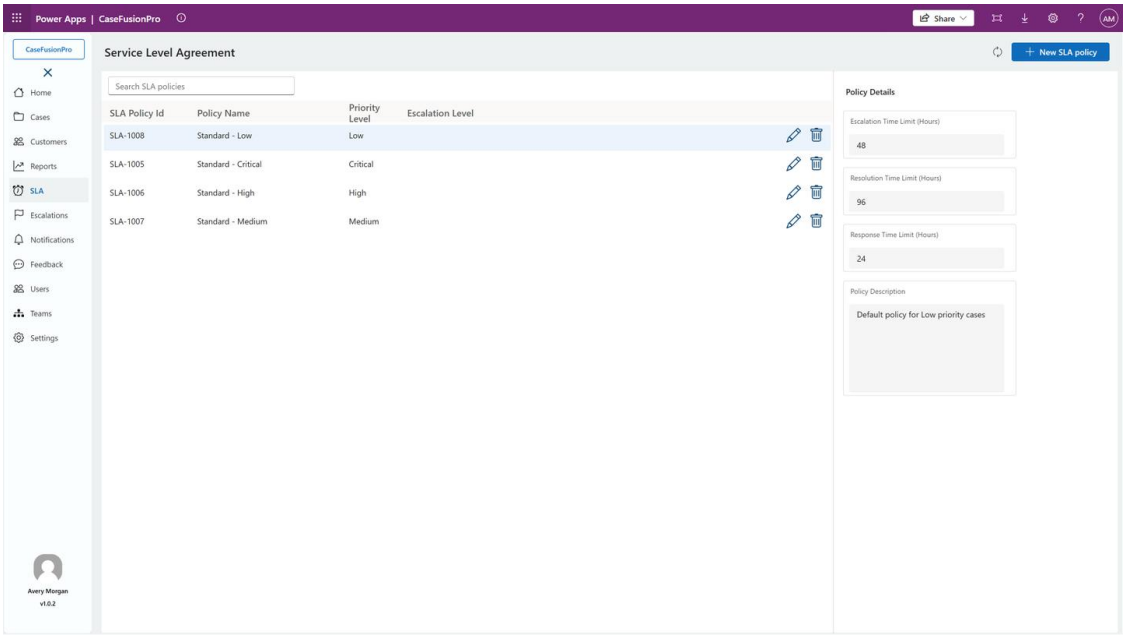
Team detail

- **New team:** name, description, lead. The lead becomes the first member.
- **Add a member:** from the Users screen, edit the user and pick a team in **Assign to team**; or create the user with a team (1.6).


New Team
Team Name
Description
Team Lead
Find items
Cancel
Save

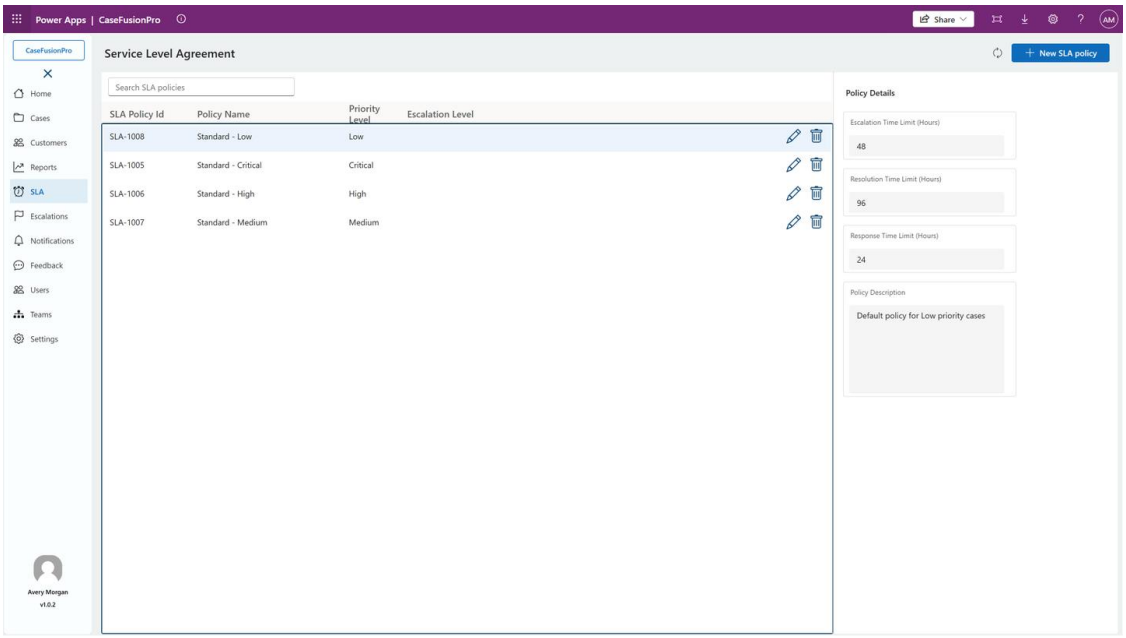
New team

4.4 SLA policies

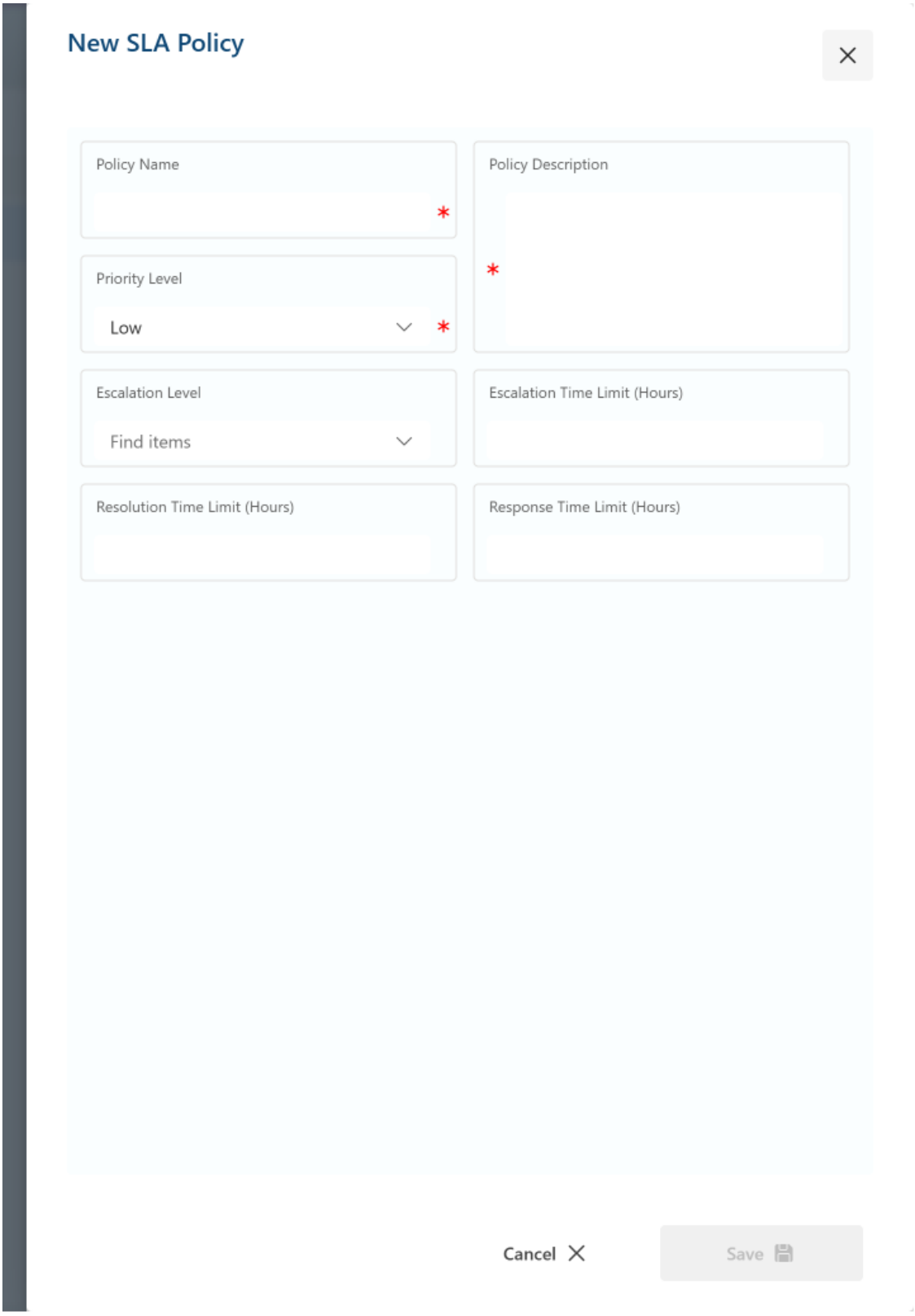


SLA policies

An SLA policy names the targets for a priority level: **Response Time Limit**, **Resolution Time Limit** and **Escalation Time Limit**, all in hours, plus a description. The starter set holds one “Standard” policy per priority (Appendix B).



SLA detail



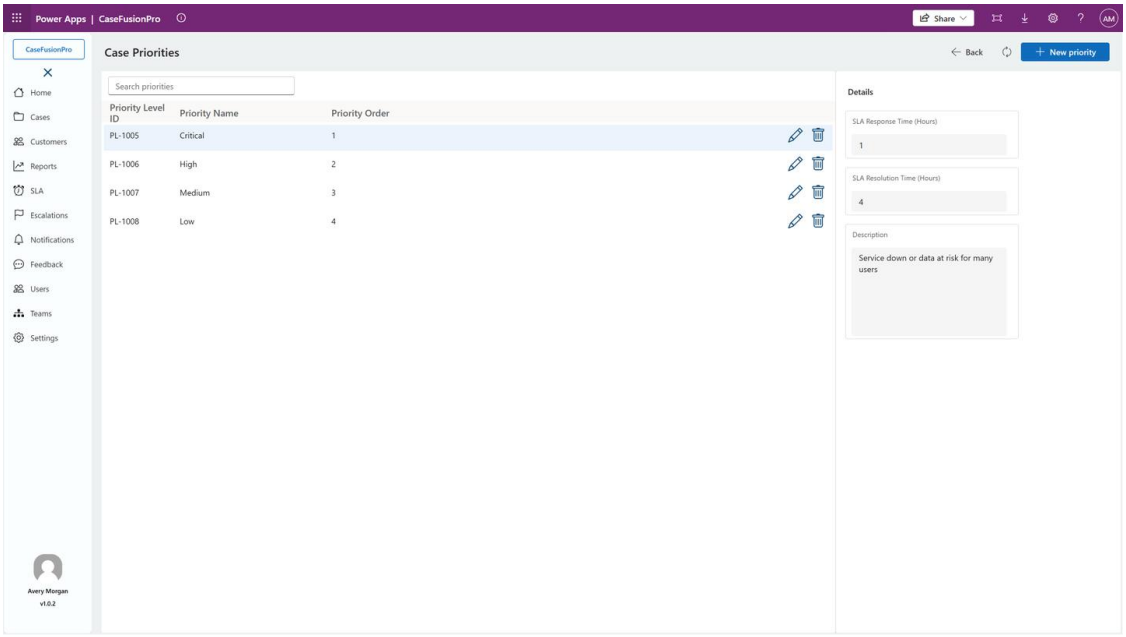
New SLA policy

How a case uses it: when a case is created with an SLA policy, an **SLA log** row is written for it and the case's SLA badge is set to **On Time**. In version 1.0 nothing recalculates the badge afterwards; a breach is recorded by editing the case's SLA status or in the SLA log (automatic recalculation is planned for 1.1). The dashboard's **SLA Breaches** tile counts cases whose **SLA Breach Occurred** flag is Yes.

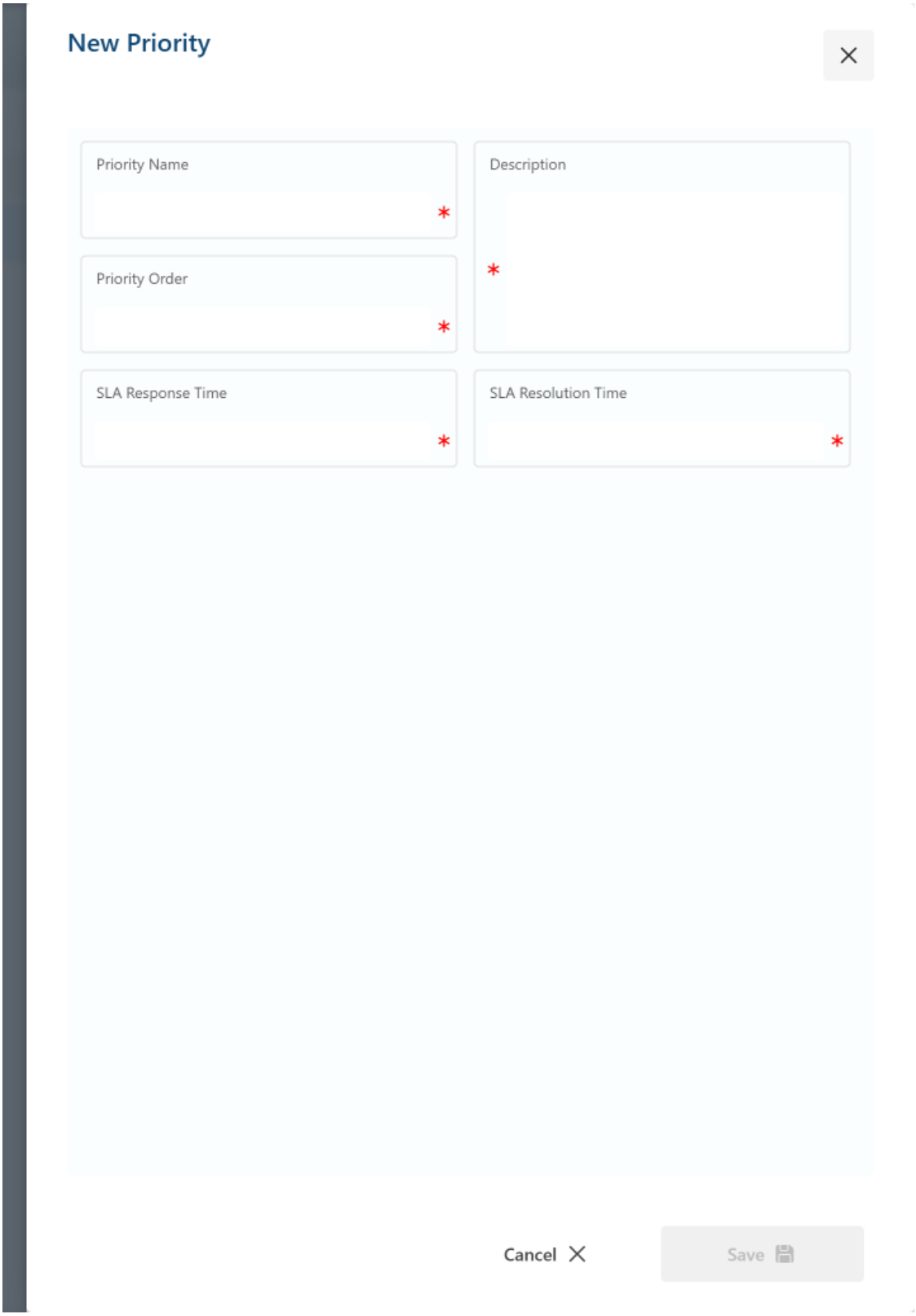
4.5 Reference data

The four classification tables behind the case form. Each opens from Settings and uses the standard screen pattern; the starter values are in Appendix B.

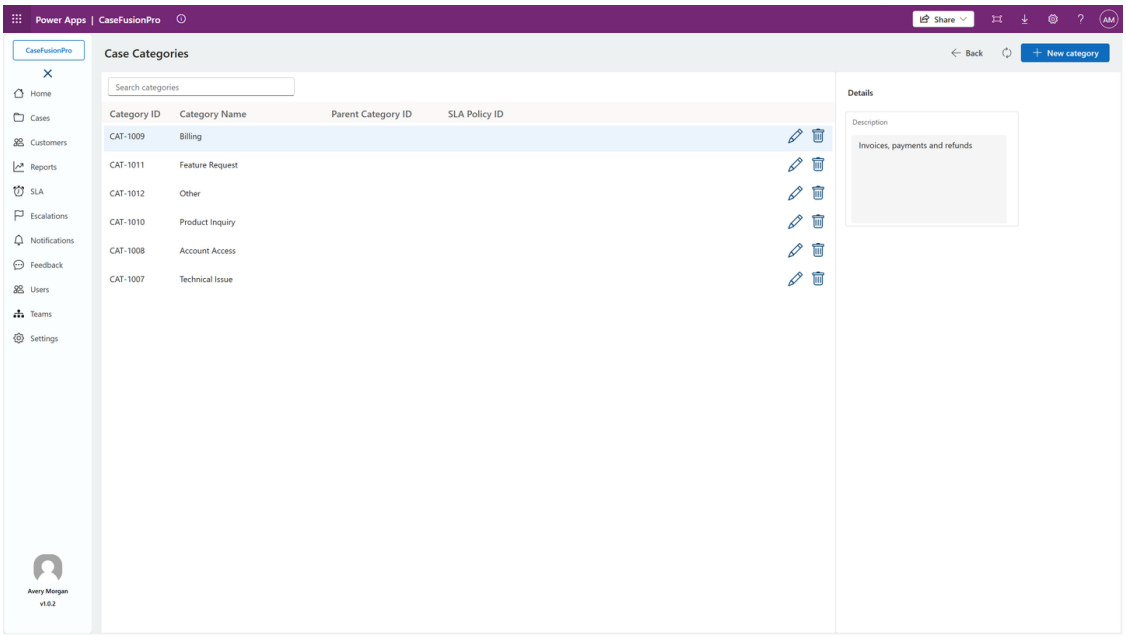
Screen	Fields
Priority Levels	Name, Order (1 = most urgent), SLA response and resolution hours, Description
Case Categories	Name, Description, optional parent category (makes it a subcategory), optional SLA policy
Regions	Name, Description, optional SLA policy
Product Types	Name, Description



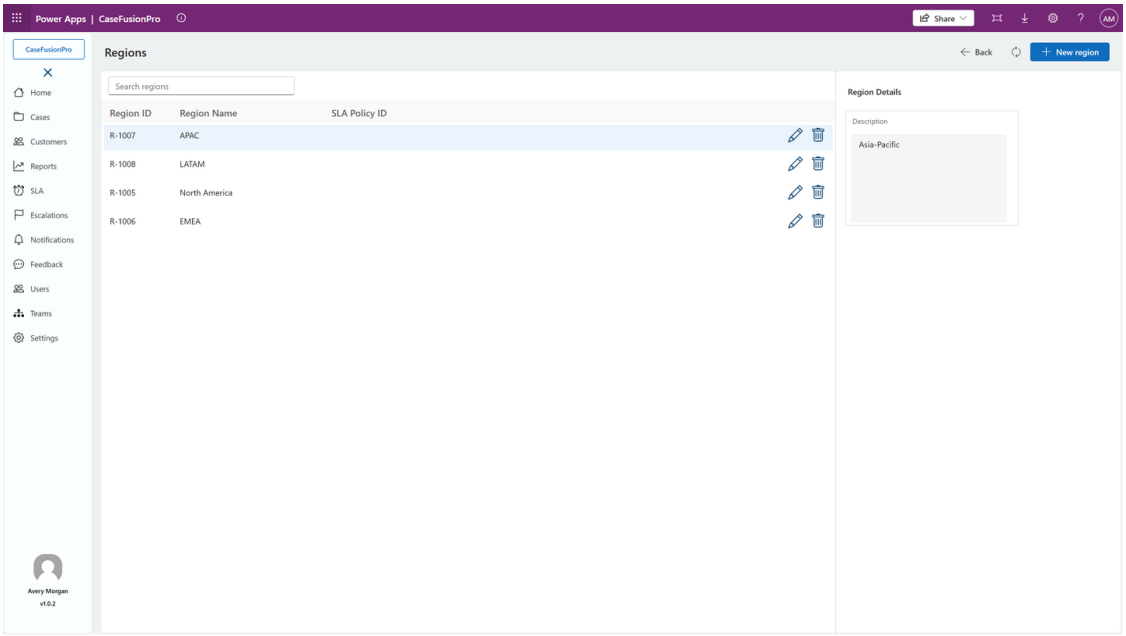
Priority levels



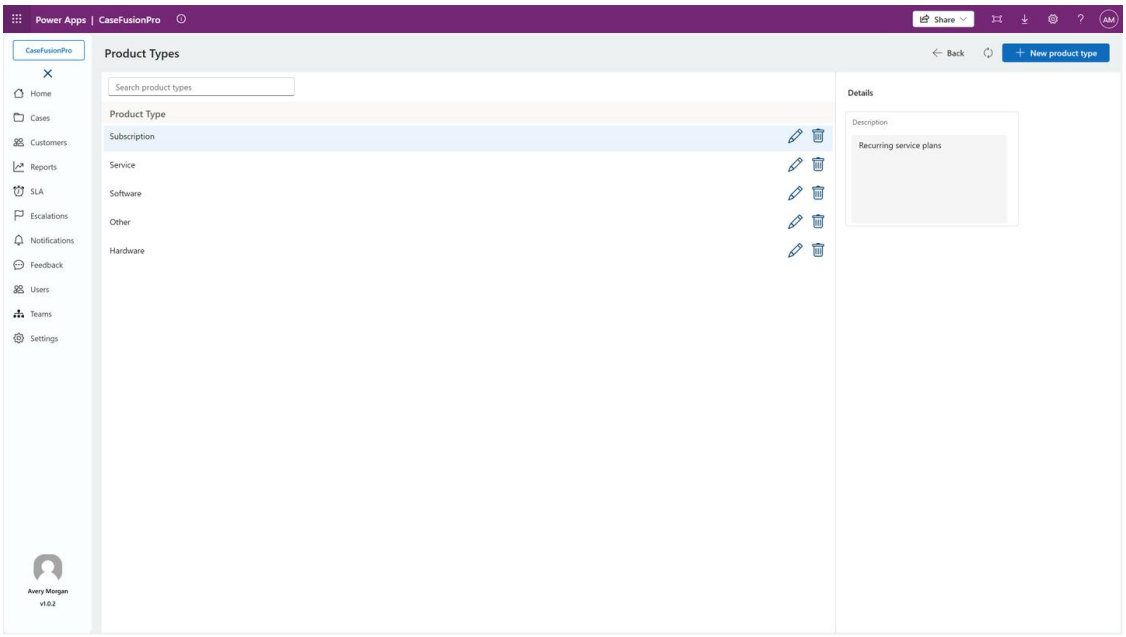
New priority



Case categories



Regions

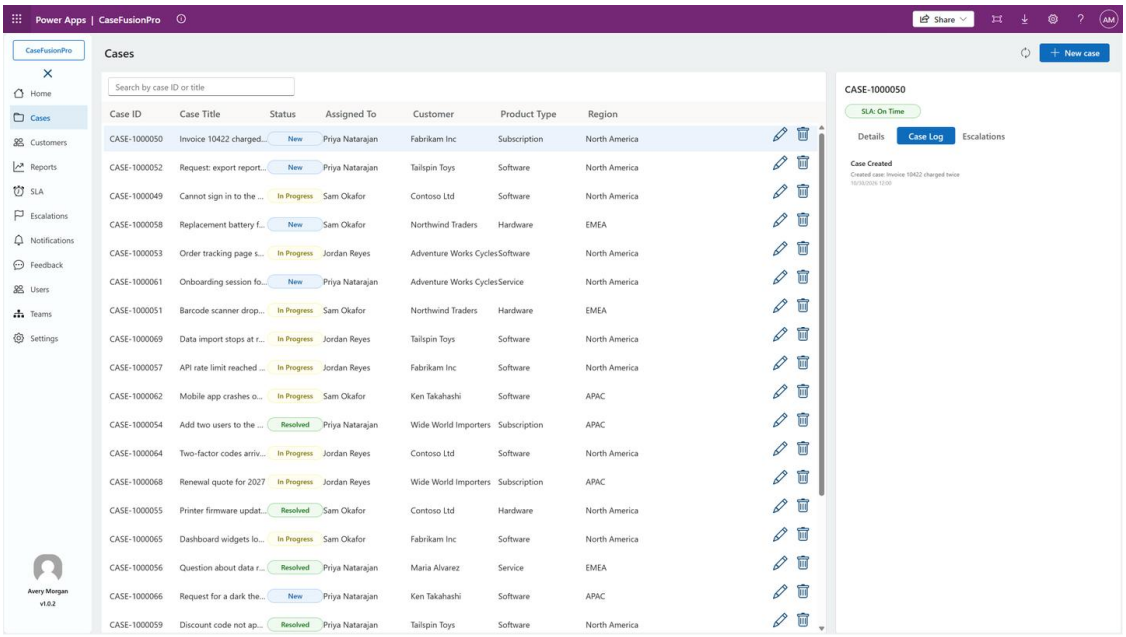


Product types

Rename or add values freely; the case form reads them live. Avoid deleting a value that cases still reference — the case keeps a dangling reference and shows a blank.

4.6 Audit trail

Every create, update and delete of a case or an escalation is written to the **Case Logs** table: log identifier, action (“Case Created”, “Case Updated”, “Case Deleted”, “Escalation Created”, …), the case, the date and time, who did it and a short description. Read it on the **Case Log** tab of a case (3.2). Entries are never edited by the app.



Case Log

4.7 Uninstalling and data retention

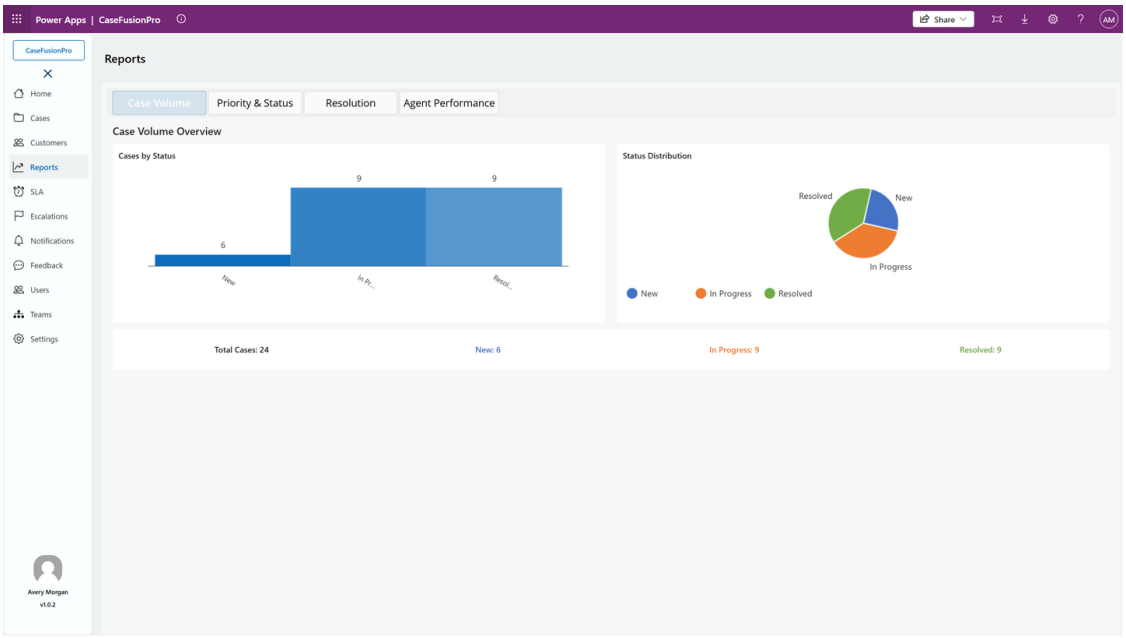
CaseFusionPro is a managed solution. **Deleting the solution deletes the app, its security role and all eighteen `pi_` tables together with every row in them** — cases, customers, logs, escalations, feedback, notifications and your reference data. Dataverse does not keep the rows afterwards, and the deletion cannot be undone from the app.

Before you uninstall:

1. Export what you want to keep — from any table's view in the maker portal (Tables → the table → Export data), with Power Query / a dataflow, or through the Dataverse Web API.
2. Take an environment backup (Power Platform admin center → Environments → your environment → Backup & restore) so that the data can be restored by restoring the environment.
3. Then delete the solution: Power Platform admin center or maker portal → Solutions → CaseFusionPro → Delete. Removing the tables takes several minutes for a small dataset and longer for a large one; wait for the job to finish before installing again.

Upgrading (importing a newer version of the solution) keeps all data and settings. Only a deletion removes data.

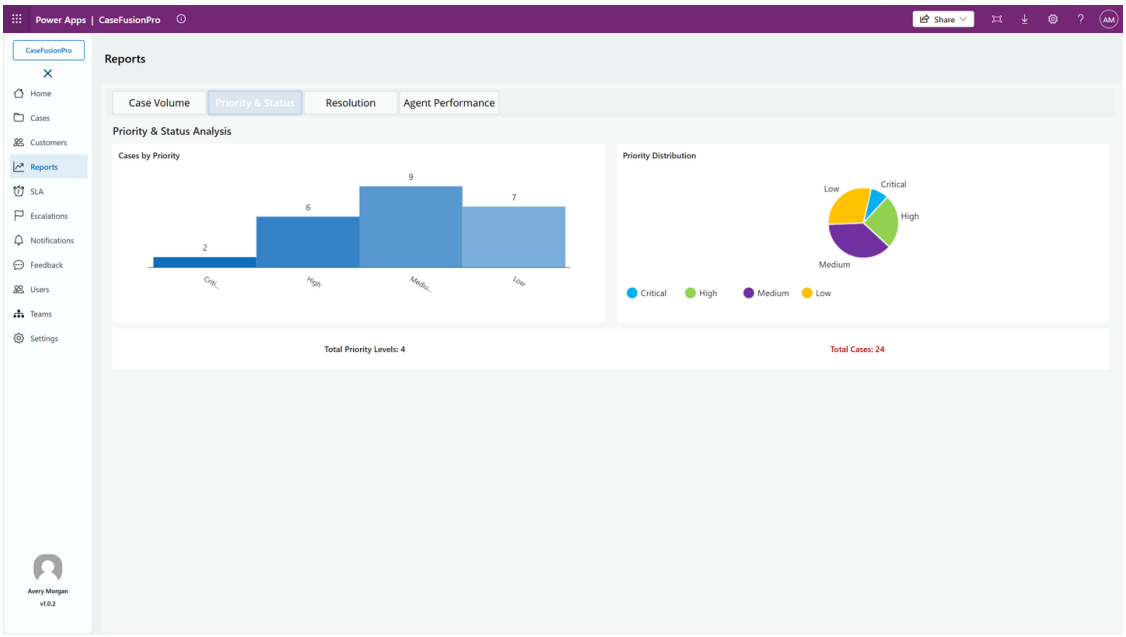
Part 5 — Reports



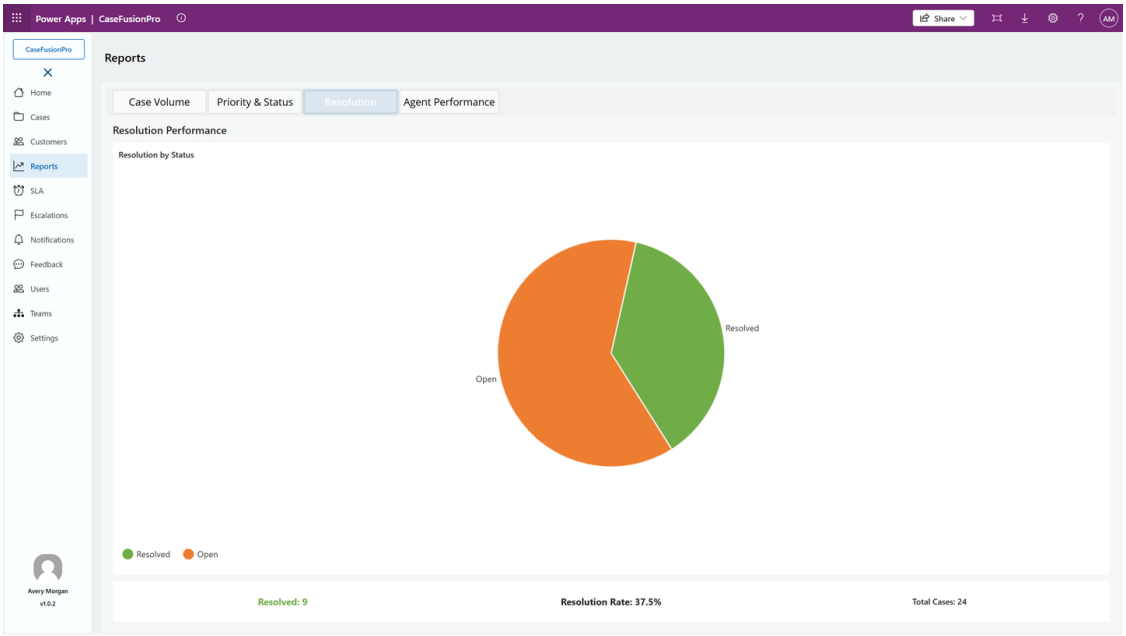
Case Volume

The Reports screen has four tabs. Every chart is computed from all cases in Dataverse at the moment the screen opens; use the sidebar to leave and come back to refresh.

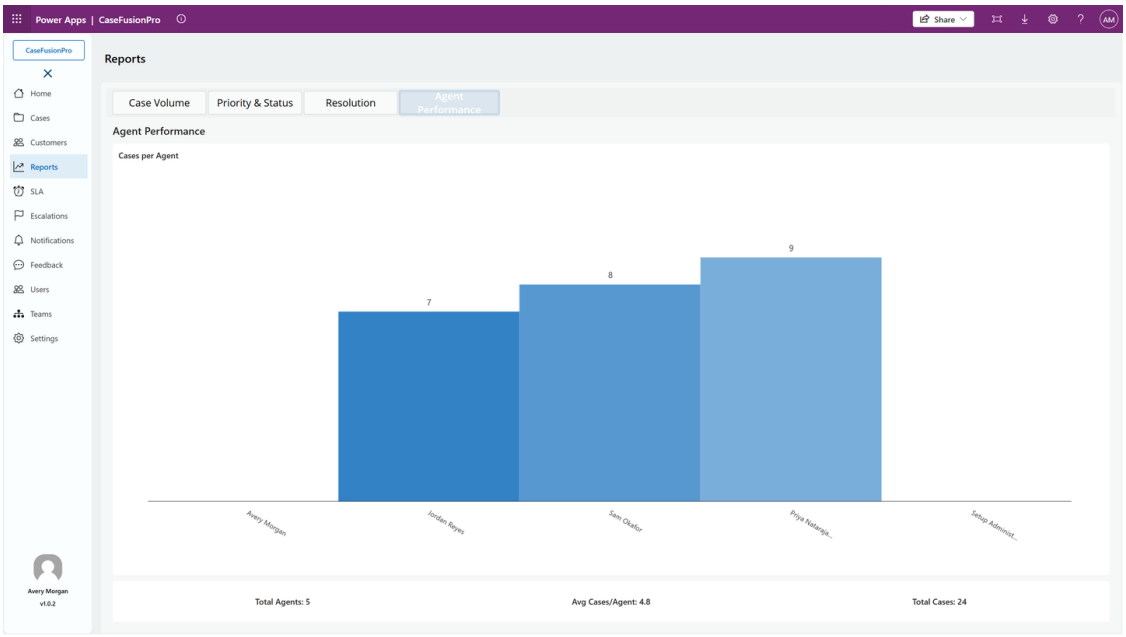
Tab	Charts and figures
Case Volume	Cases by Status (column chart), Status Distribution (pie), totals: all / New / In Progress / Resolved
Priority & Status	Cases by Priority (column chart), Priority Distribution (pie), number of priority levels, total cases
Resolution	Resolved vs Open (pie), resolved count, resolution rate, total cases
Agent Performance	Cases per Agent (column chart), number of agents, average cases per agent, total cases



Priority & Status



Resolution



Agent Performance

Column charts shorten long labels to about six characters (“Mediu…”); the full name is in the legend of the pie chart beside it, and screen readers get the full data table.

Part 6 — Troubleshooting

Symptom	Cause	Fix
Every screen shows a data error or empty lists for one person	The person lacks the **CaseFusionPro User** security role	Assign Basic User + CaseFusionPro User (1.4)
A person sees data but no New/pencil/trash buttons and no Settings	No Case Users row, or its **Email** differs from the sign-in address, or the role is Agent	Create or correct the row under Users (1.6, 4.2)
The app opened on the dashboard instead of Get Started	A Case Users row already exists (someone else ran the wizard, or rows were imported)	Open Settings → Getting Started as an Admin, or have an Admin create your row
“You’re using an old version” banner	A newer version of the app was published	Click **Refresh** in the banner
Dashboard charts are empty	No cases yet	Create the first case
The import seems stuck in the maker portal	Long imports exceed the portal’s wait	Check Solutions → History; do not start a second import while one is running

Symptom	Cause	Fix
A deleted reference value left a blank on a case	The value was referenced by cases	Recreate the value or edit the affected cases

If none of this helps, see Part 8.

Part 7 — Limitations and roadmap

In version 1.0	Workaround	Planned
SLA status is set at creation and never recalculated	Set the status by editing the case; review the SLA log	1.1 — automatic recalculation (Power Automate)
No SLA warnings and no Teams notifications; phone notifications open Power Apps Mobile, not the case	Read the notice in the Notifications screen	1.1 — notification flows with a deep link
No automatic escalation	Raise escalations manually	1.1
No average resolution time on the dashboard	Use the Resolution tab of Reports for the resolution rate	1.1 — resolution time once cases carry a resolution date
Administration screens are hidden from non-admins, not blocked	Share the app only with users who hold the CaseFusionPro User role	1.1
Column-chart labels are shortened to about six characters	Read the legend / pie beside it	1.2 — Power BI
Reports are native chart controls with no drill-down	—	1.2 — Power BI embedded
Two configuration tables ship without screens (Custom Field Configuration, Field Configuration)	None needed	1.1

Part 8 — Support

[OWNER: support address, hours and response target — publish plan G3/G4.]

When you report a problem, include: the environment name and region, the app version (bottom of the sidebar), the screen and what you clicked, a screenshot of any message, and whether other users see the same thing.

Privacy: CaseFusionPro stores all data in your own Dataverse environment and calls no external service. Pleasant Innovations has no access to your data.

Appendix A — Dataverse tables

All tables use the `pi_` prefix and are covered by the **CaseFusionPro User** role.

Table	Holds
Case	Support cases
Case Customer	Customers (companies or individuals)
Case User	App users and their role
Case Team · Case Team Membership	Teams and who belongs to them
Case Priority · Case Category · Case Region · Case Product Type	Classification values for the case form
Case SLA Policy	Response / resolution / escalation targets per priority
Case SLA Log	One row per case with its SLA status
Case Log	The audit trail
Case Escalation	Escalations
Case Feedback	Customer feedback
Case Notification	Notifications
Case Roles	Role definitions (reserved; the app reads the role from Case User)
Case Field Configuration · Case Custom Field Configuration	Reserved for 1.1

Choice: Breach Type (Response Time Breach, Resolution Time Breach, Other).

Appendix B — Starter data

Loaded by **Load starter data** into tables that are empty.

Priority Levels

Name	Order	Response h	Resolution h	Description
Critical	1	1	4	Service down or data at risk for

Name	Order	Response h	Resolution h	Description
				many users
High	2	4	24	Major function unavailable, workaround not acceptable
Medium	3	8	48	Function impaired, workaround available
Low	4	24	96	Question, cosmetic issue or minor request

SLA Policies (one per priority): Standard – Critical 1 / 4 / 2 h · Standard – High 4 / 24 / 8 h · Standard – Medium 8 / 48 / 24 h · Standard – Low 24 / 96 / 48 h (response / resolution / escalation).

Case Categories: Technical Issue · Account Access · Billing · Product Inquiry · Feature Request · Other.

Regions: North America · EMEA · APAC · LATAM.

Product Types: Hardware · Software · Subscription · Service · Other.

Teams: Tier 1 Support (first response and triage) · Tier 2 Support (specialist resolution).