PARENT AND CHILD CASES QUICK GUIDE
PARENT AND CHILD CASES

Description: This quick guide provides steps and information on create and work Parent Child cases.

Steps to perform the following are included:

- Creating a parent child cases
- Closing a parent child cases
- Additional knowledge resources

Related resources on MyFSU Service Center page
- Creating and Work a Case

Created: 12/8/2020
PARENT CHILD CASES

- This relationship allows for cases to be all related to one overarching case.
- For example: When a scheduled maintenance /outage is going to occur with a service, the service provider can create a parent case so if any users report an outage, agents can create child cases.

By creating a new case within the parent:
1. Locate an existing case or create the case that will serve as the Parent case.
2. From the Related tab on a case, go to the Related Cases section
3. Click New
4. Select a record type then click Next
5. Fill out the new case form and click Save.

Note - The child case is now listed within the Related Cases section of the parent case.

By relating an existing case:
1. From a case to relate to a parent case, go to the Parent Case card
2. Use the Search Cases field to enter or search for the number of the parent case
3. Select the appropriate case number

Note - The parent case’s details will appear in the Parent Case section of the child case.
CLOSING A PARENT CASE TO CLOSE ALL RELATED CASES

- Once the issue with the cases are resolved, an agent can close the parent case to close all child cases.

1. Open the parent case record for which you want to close multiple child cases.
2. In the upper right-hand corner, click the Close child cases button.
3. Review the information of the child cases, then click Next.
4. Click the Close reason screen dropdown to select the Close Reason for the parent case, enter any resolution comments to appear on the parent case, then click Next.

Note: All associated child cases will be closed with closed reason, ‘Closed by Parent.’

5. Click Next, then click Finish to close the parent case and all associated child cases.
For more detailed information, see the Knowledge articles linked below. For more articles, go to Knowledge and select the “Agent Training Articles” list. You can also search for the #AgentTraining topic and go to the Related section of that topic page.

Knowledge articles in the myFSU Service Center may be archived or removed over time. If you are unable to locate an article by the link included in this training document, please be sure to search for the article by name instead.

How do I relate a case to a parent or child case?
How do I close all child cases when I close a parent case?