Run a case playbook and coordinate a major case

Configure playbook activities, complete an active run, and manage coordinated updates without losing case-specific access.

https://docs.qintoravacloud.com/guides/customer-playbooks/

Configure the playbook

In **Customer Service → Case playbooks**, use an authorized administrator to configure the name, category, active state, and ordered activities. Give every activity a stage, instructions, required flag, and duration. A definition supports one to thirty activities with at least one required activity. Save with the current version and evidence.

Start and finish a run

1. Open an active case, select **Start playbook**, and pick the definition from the search results. A case can use up to five distinct definitions. Starting the same definition again returns the existing run.
2. Check the version captured on the run and the created case tasks. Complete required activities in order. Complete or cancel optional activities, then explicitly finish the run.
3. If a run must be cancelled, have a customer service manager record the decision. Check the preserved task and audit history. An unfinished run blocks resolution or cancellation of the case.
4. Compare activity due guidance with the case's separate contract or business SLA. Review the activity history and confirm the correct run when the definition has since changed.

Coordinate a major case

An agent proposes an active case with impact and justification. A customer service manager or platform administrator reviews it. Link only the related cases and verify each retains its account, contact, incident, field work and SLA evidence. Review the audience before publishing a customer-safe update. Check the message on the linked cases. Close coordination after the linked cases have completed their own resolution paths. If closure is blocked, check for a linked case that has reopened.