Welcome to OmbuDesk

OmbuDesk is a modern dispute resolution software used for the efficient management and processing of disputes. This manual describes OmbuDesk from the user's perspective.

Core Functions

OmbuDesk enables you to map your entire dispute resolution process. Here you can see an overview of OmbuDesk:

- **Digital Case Files:** One centralized digital case file for every complaint including all data, communication, case history & more.
- **Integrated Communication:** Complete processing of all communication directly in OmbuDesk.
- **Document Management:** Easy management of all documents, master data & correspondence.
- **Deadline Monitoring:** Automatic creation, monitoring and reminder of deadlines for your parties and internal processing.
- **Statistics and Reports:** Effortless generation of reports, statistical analysis and the visualization of key performance indicators.

How is the manual structured?

The manual follows the structure of OmbuDesk:

1. **Dashboard:** Overview of important key figures, new applications & messages, as well as deadlines & approvals.
2. **Case Overview:** Complete list of all applications/cases.
3. **Digital Case File:** Detailed description of the digital case file and the available quick actions.
4. **Complainant:** Directory and management of complainants.
5. **Respondent:** Directory and management of respondents.
6. **Deadlines:** Central view of all deadlines.

7. **Unassigned Messages:** Management of messages that cannot be assigned to any case.
8. **Search:** Powerful search functions in OmbuDesk – including the global search, filter/criteria search and the similarity search.
9. **Reports:** Easy access to reports that are tailored to your wishes.
10. **Settings:** Administration area that enables automation, customizing of fields, statuses and more.

What terminology is used in this manual?

We are well aware that terminology differs for every body that handles complaints. However, this manuals' main purpose is to explain all core functions and case processing options as cleary and easy as possible.

This is why the following choices have been made for the used terminology:

Ombudsman, Alternative Dispute Resolution and Commissioner Offices are always referred to as "dispute resolution offices".

Complaints are mainly referred to as "cases", when used in the context of the application. Similarly, the "digital case file" bundles all data, communication, documents and processing functions of a complaint.

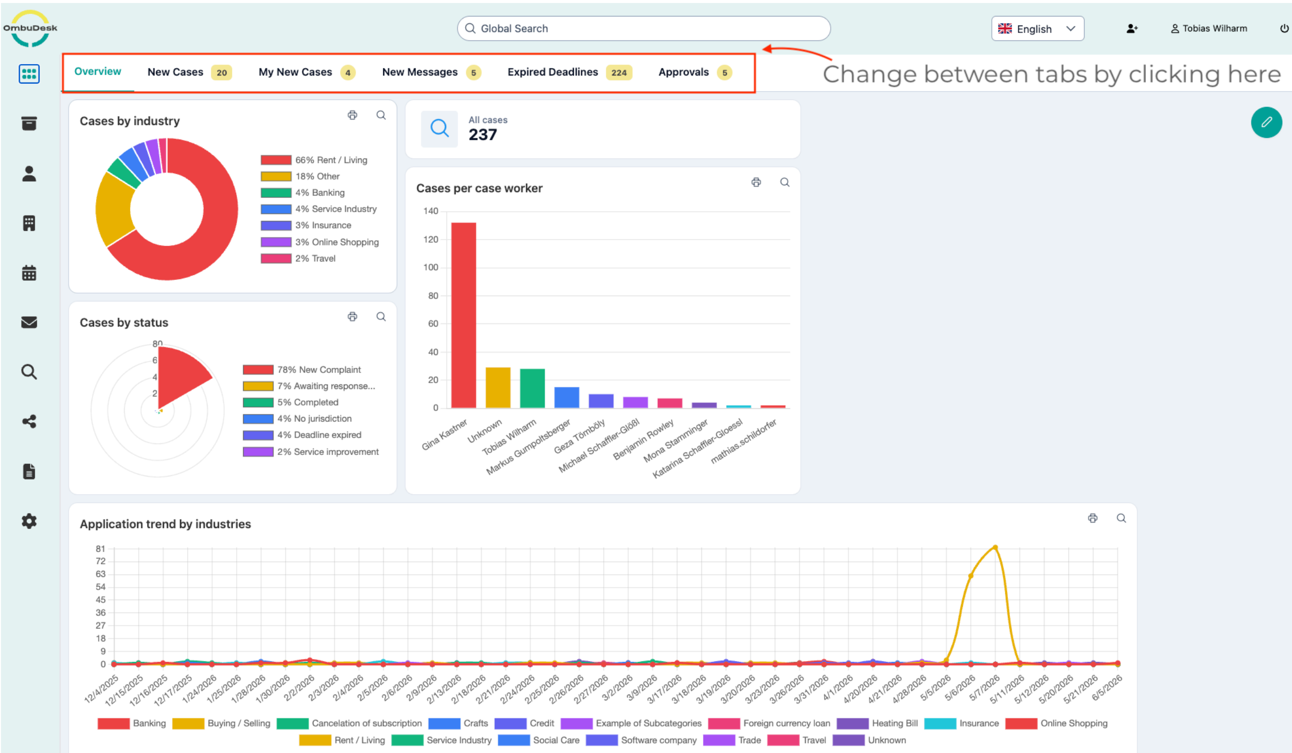
Employees, which handle complaints, are referred to as "Case Managers". Ombudsman, Arbitrators, Adjudicators, etc. are referred to as "Conciliators".

Important to know: Changing any terminology is free of charge, when you decide to use OmbuDesk.

Dashboard Overview

The dashboard is the central view in OmbuDesk. It allows you to grasp the current work status at a glance and identify urgent tasks immediately.

The most important information is grouped into different tabs for you to easily maintain an overview during case processing.



How is the dashboard structured?

In the dashboard, **various tabs** are available to you, reflecting the processing of a case. In addition, each tab shows a number in a **yellow circle (badge)**, indicating how many entries are currently in this area.

You can access the following data pages via your dashboard at any time:

1. **Overview:** A visual overview of important key figures of your dispute resolution office.
2. **New Cases:** A list of all recently received applications that have not yet been assigned to a case manager.
3. **My New Cases:** All cases assigned to the currently logged-in user that have not yet been processed.

4. **New Messages:** An overview of all unread messages related to ongoing cases.
5. **Expired Deadlines:** All cases where a set deadline has been exceeded and action is required.
6. **Approvals:** Messages that are currently in the approval process and have not been checked.

How can you customize the data pages according to your individual needs?

Each of the mentioned data pages shows you the corresponding cases in tabular form. Directly below the tabs, you can edit the displayed fields. Each user can configure this view individually. So you can adapt each data page according to your personal preferences.

Which information can you show and hide?

Using the column selection button (top left), you can determine which information is displayed. Possible columns include:

- **Case Number:** The unique identifier of the case.
- **Created on:** The date the application was received.
- **Status:** The current processing state.
- **Complainant:** Name of the person who initiated the procedure.
- **Respondent:** The companies or institutions involved in the procedure.
- **Current Deadline:** The date by which the next action must take place.

How do you filter the displayed cases by your role?

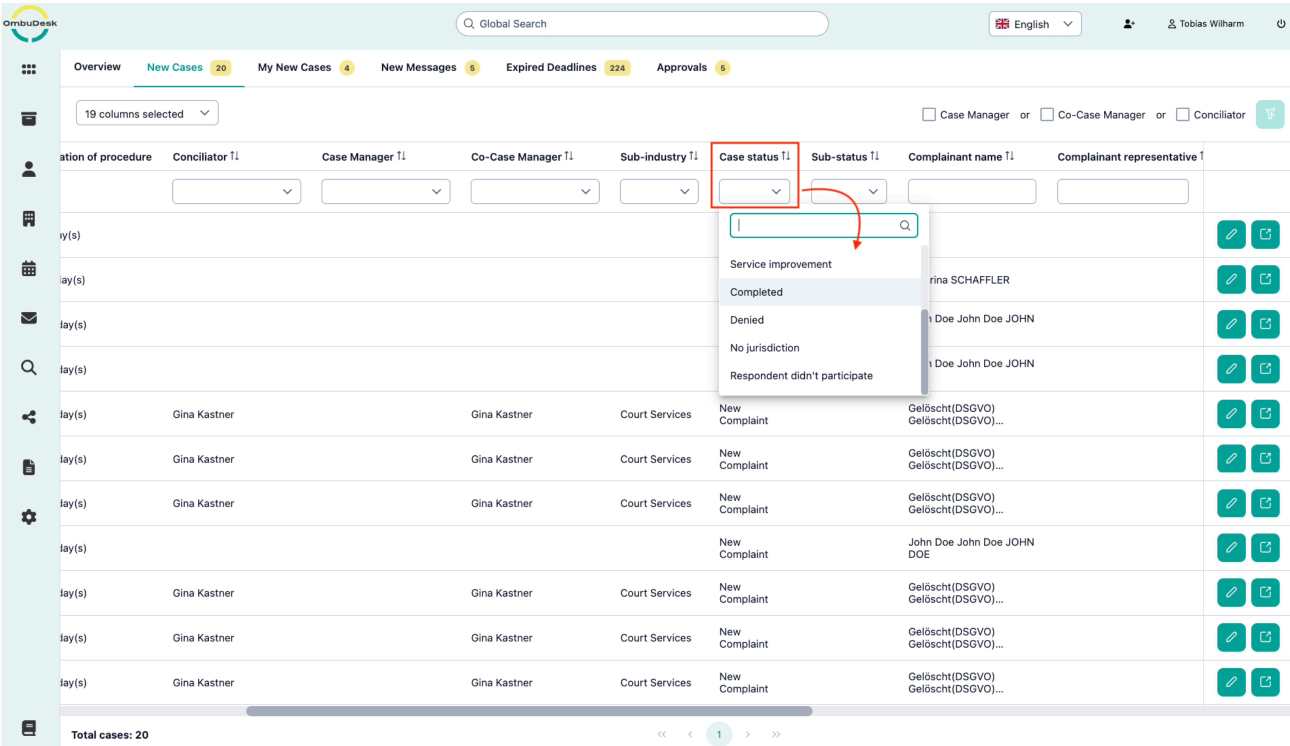
You will find three checkboxes on the right, under the tabs, which allow you to filter all cases by your **role**:

If you select a **checkbox** by clicking, OmbuDesk filters all cases accordingly. If you select, for example, "Case Manager", you will only see cases where you are the **Case Manager**. The same is true for **Co-Case Manager** or **Conciliator**.

Which quick searches are already possible in the data fields?

You can perform a **criteria search** in the data fields of your dashboard view. Your filter options correspond to the available options of the respective data field.

For example, if you only want to see cases for which your office **is/was not responsible**, simply set the status to **"no jurisdiction"** and OmbuDesk will show you all corresponding cases.

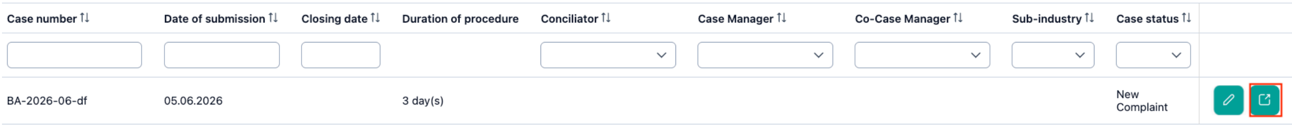


Which options are available to you for case processing in the dashboard?

On the right edge of the dashboard view, you will find two linked actions to process a case:

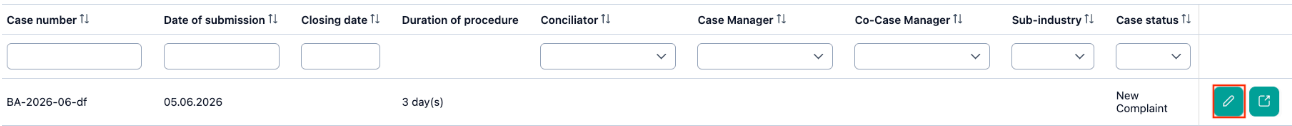
1. Open digital case file

If you click on the pop-up symbol, the complete view of your digital case file opens.



2. Quick editing of a case:

If you click on the pencil symbol, you can edit certain attributes of a file directly in the dashboard view.

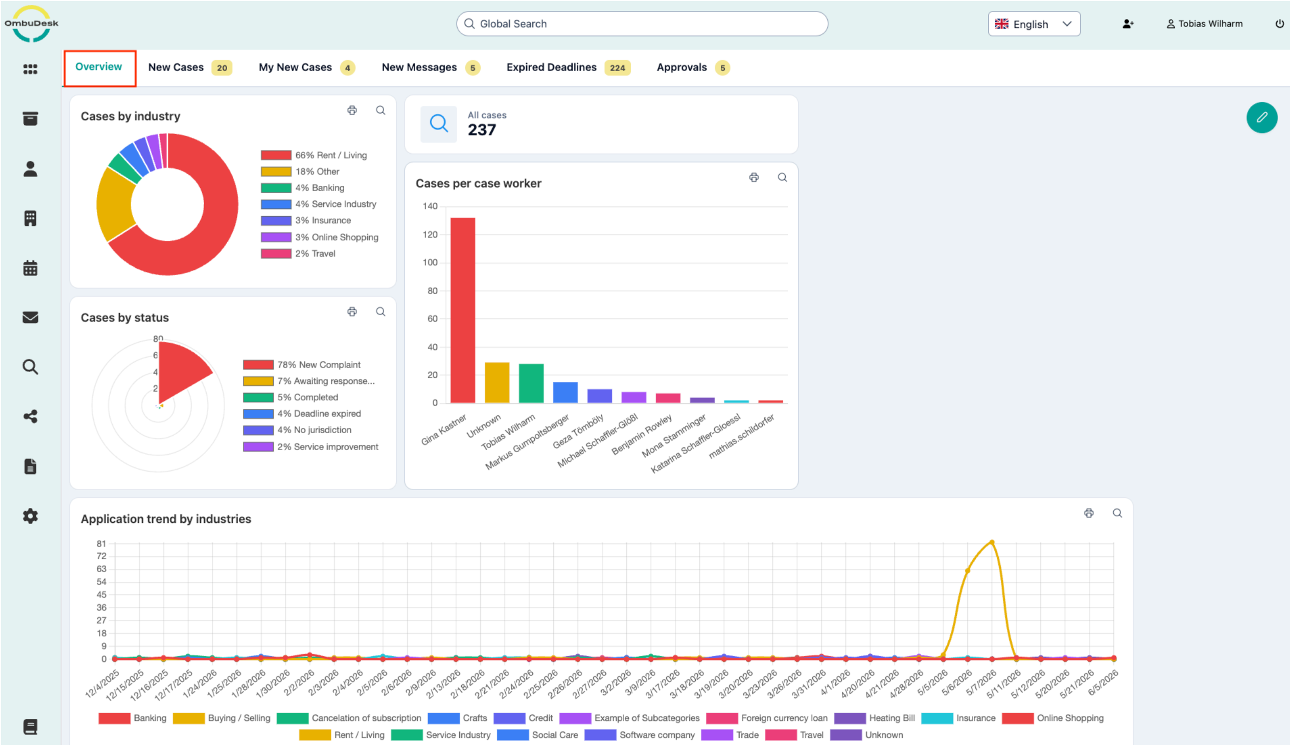


The following case attributes can be changed this way:

- Conciliator
- Case Manager
- Co-Case Manager
- Respondent
- Representative
- Industry
- Sub-industry

Overview

The overview is the home page of OmbuDesk.



What is the purpose of the overview?

The overview **visualizes the data** from OmbuDesk. Here you can see **important key figures** of your dispute resolution office at a glance and identify **trends** in your data.

How does the overview work?

The overview is directly linked to the **filter search**. The **results of a saved search** are visualized here. This enables you to customize what is shown in the overview and keep track of any **key performance indicators** you prefer.

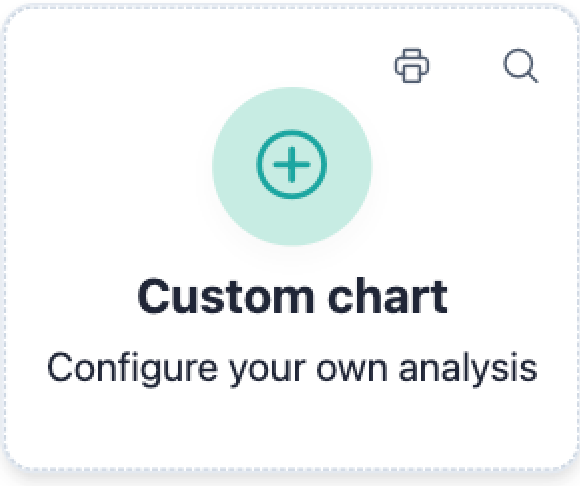
You can look up how the **filter search** works here: Search

How do you visualize your own key figures, relevant statistics and key performance indicators?

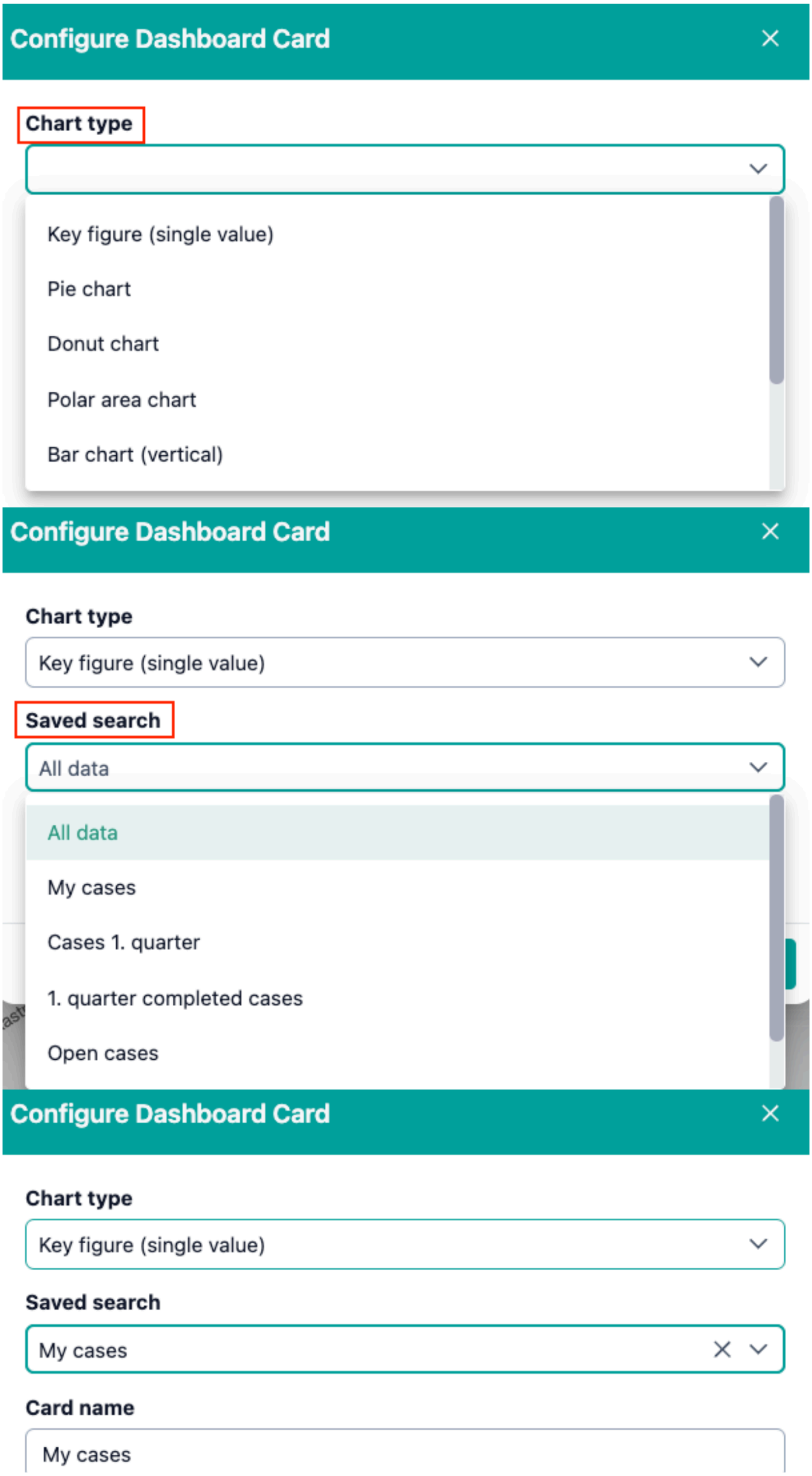
Follow these steps to create new cards in the overview:

1. Press the **green pencil symbol** on the top right edge, which shows the tooltip **"Edit Dashboard"** when your mouse hovers over it.

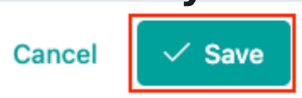
2. Select the most left option at the top corner **"Custom chart"** and drag the card onto a **free space** in the dashboard.



3. Choose a **Chart type**, a **saved search** and assign a **Card name**.


Configure Dashboard Card
Chart type
Key figure (single value)
Pie chart
Donut chart
Polar area chart
Bar chart (vertical)
Configure Dashboard Card
Chart type
Key figure (single value)
Saved search
All data
All data
My cases
Cases 1. quarter
1. quarter completed cases
Open cases
Configure Dashboard Card
Chart type
Key figure (single value)
Saved search
My cases
Card name
My cases

What options do you have to customize the layout of the overview according to preferences?



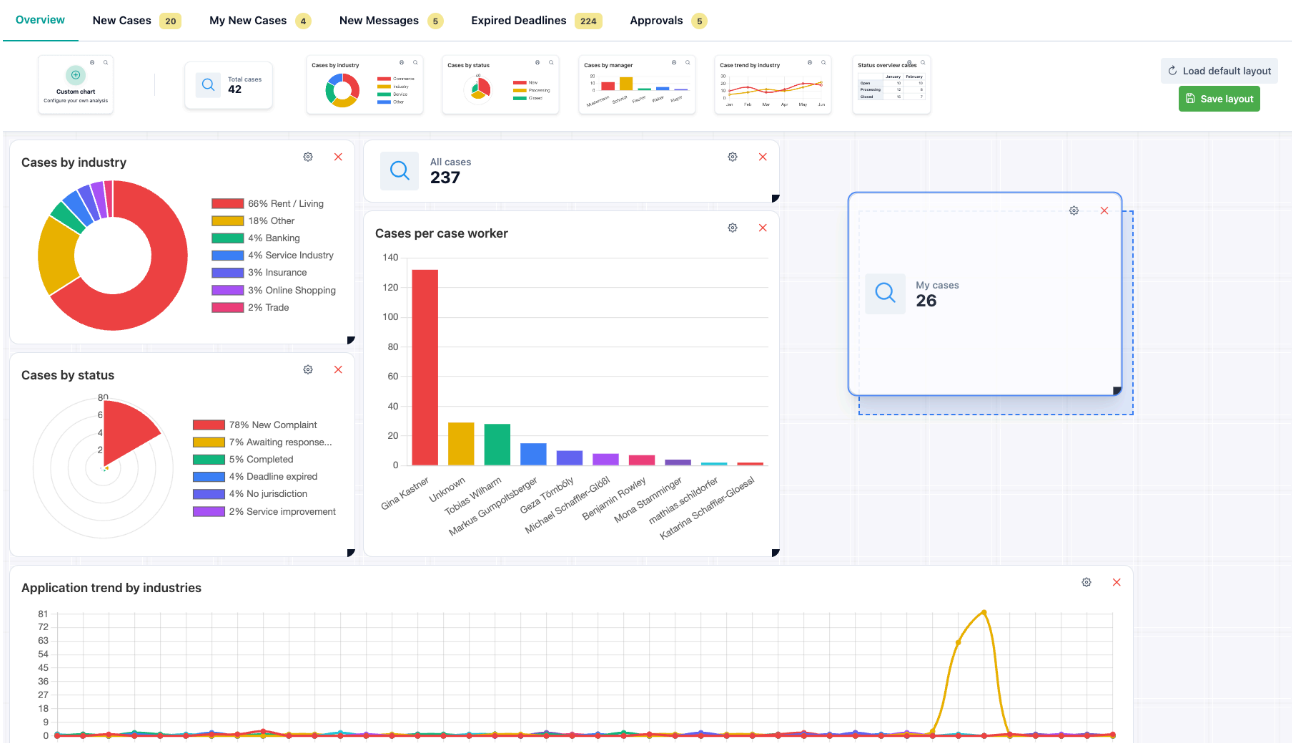
You can ...

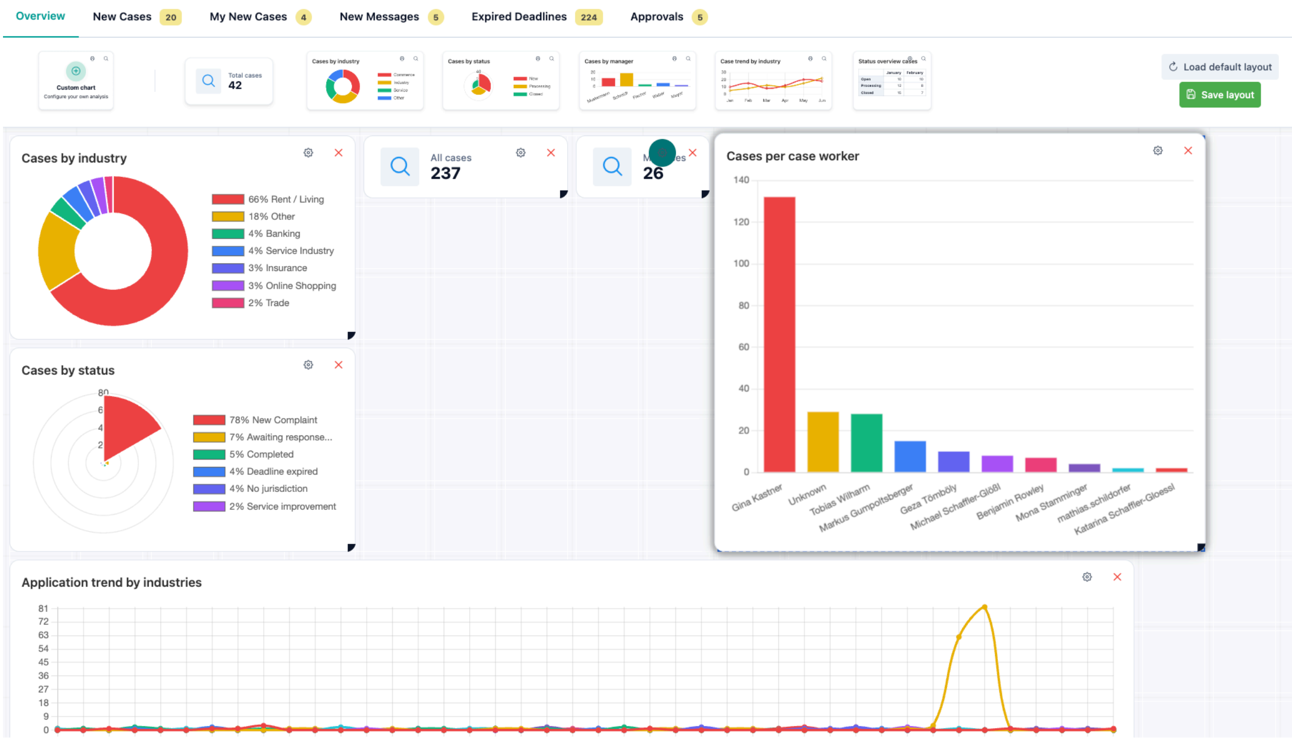
... adjust the **size of each card** in the overview.

... adjust the **position of each card** in the overview.

Use drag and drop as well as reseizing on the edges to achieve a layout that you like.

The following images illustrate your customization options:

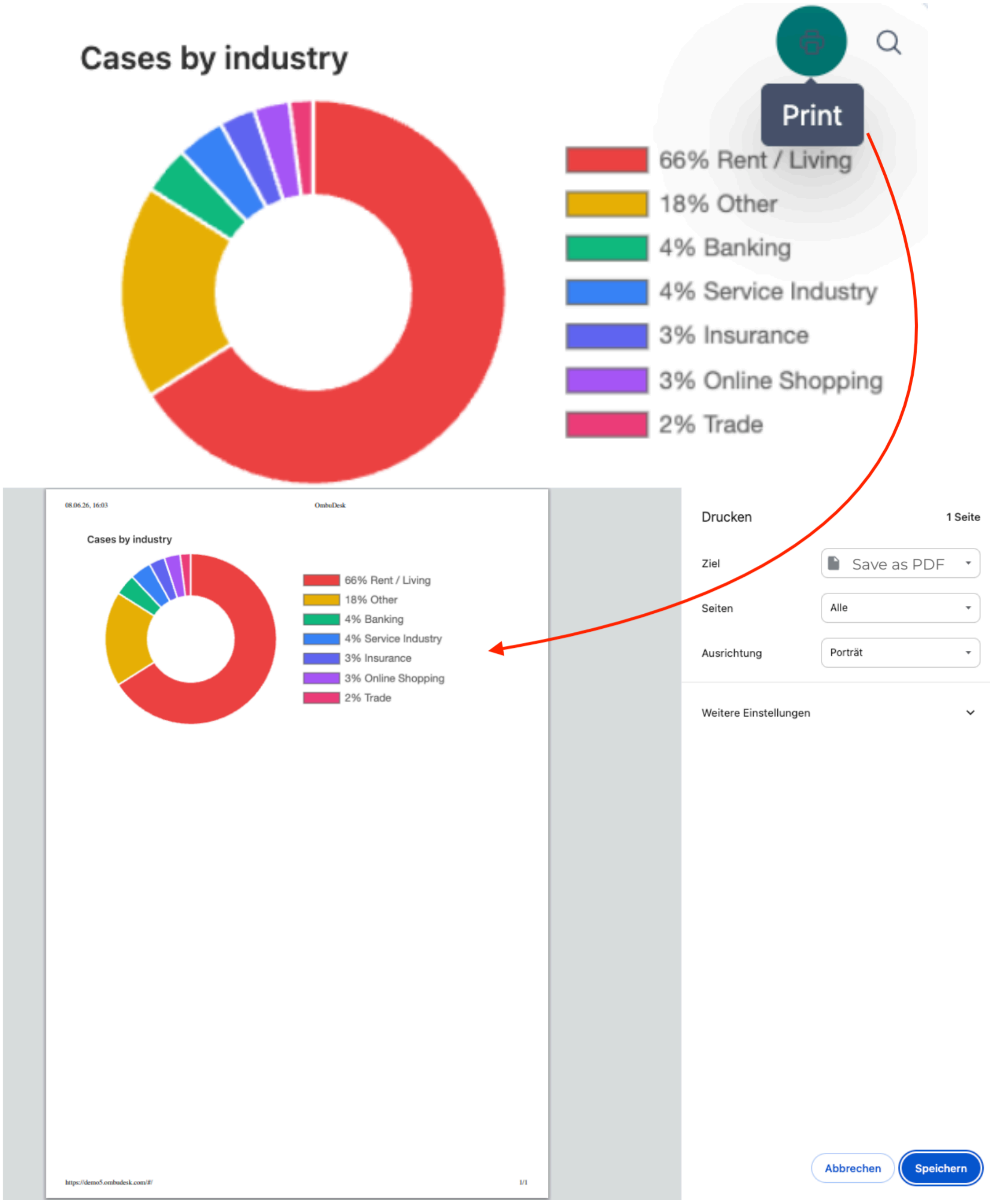




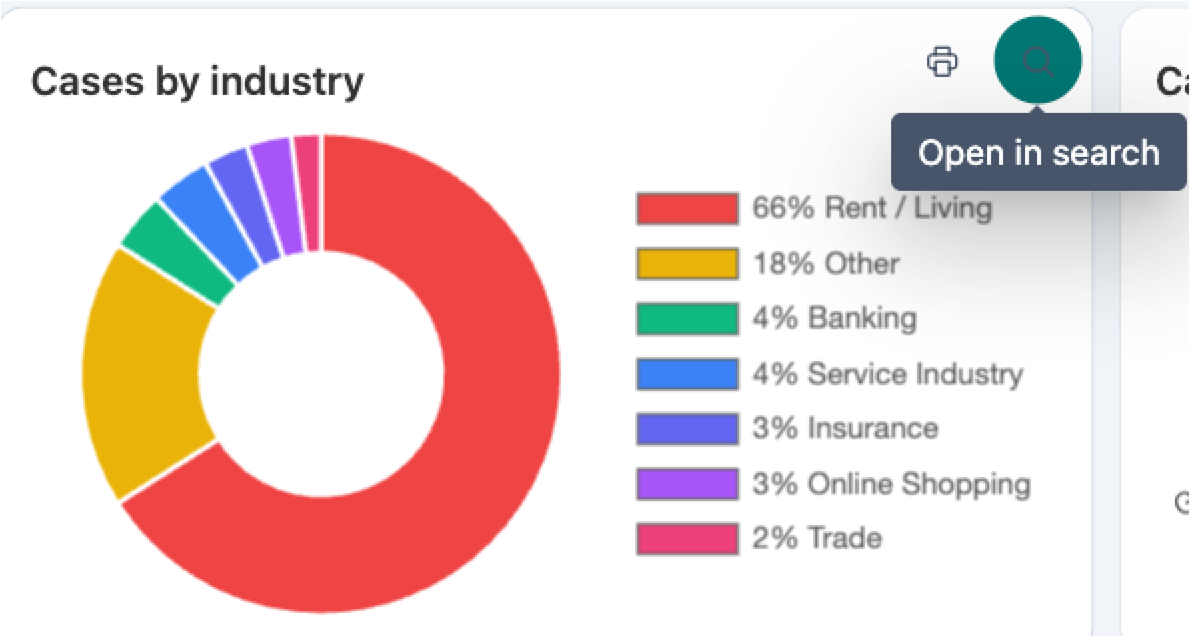
What other actions can you take in the overview?

For each card you can ...

1. ... open the **print view**.



2. ... call up the **linked search**.

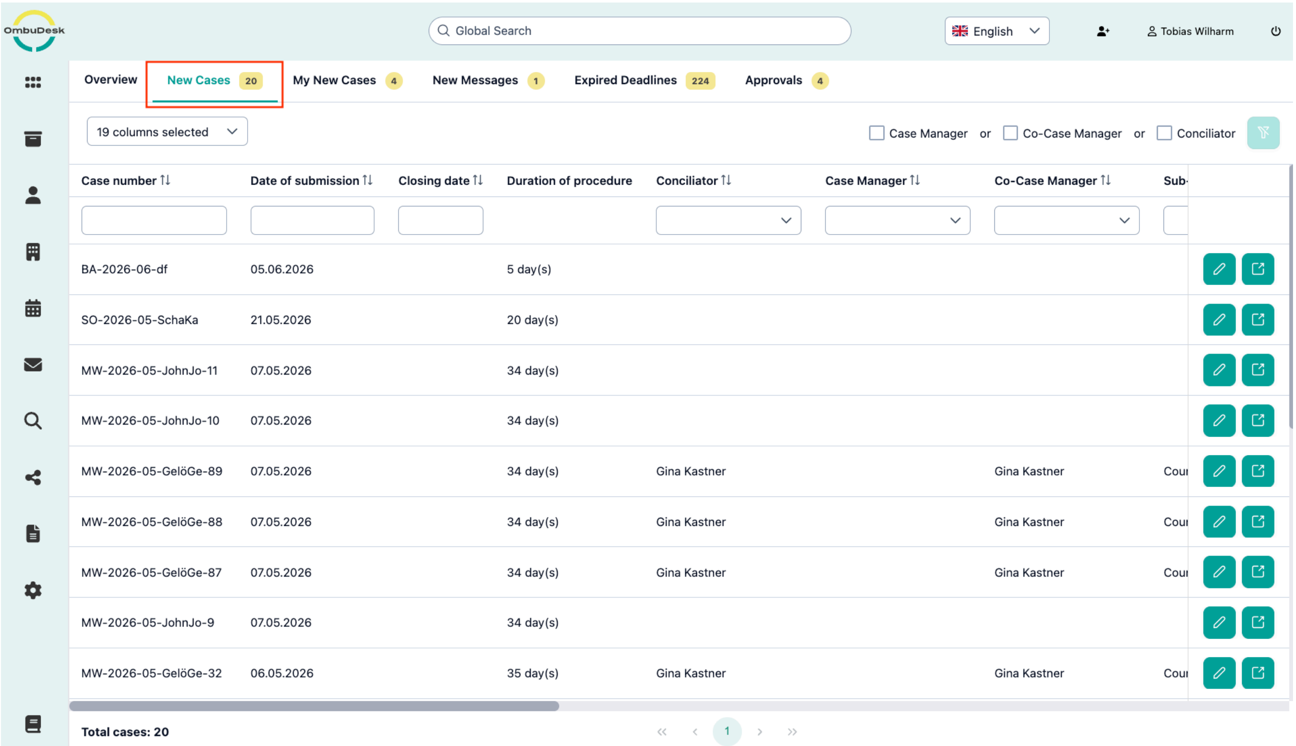


Does the overview change for all users if I adjust something?

No, every user has an **individual overview**. Changes are only saved for the respective user. On request, it's possible to configure a standard dashboard for all users that's always visible and provide an extra private dashboard for every user.

New Cases

The **"New Cases"** tab shows you all applications that have reached your dispute resolution office but are not yet being processed.



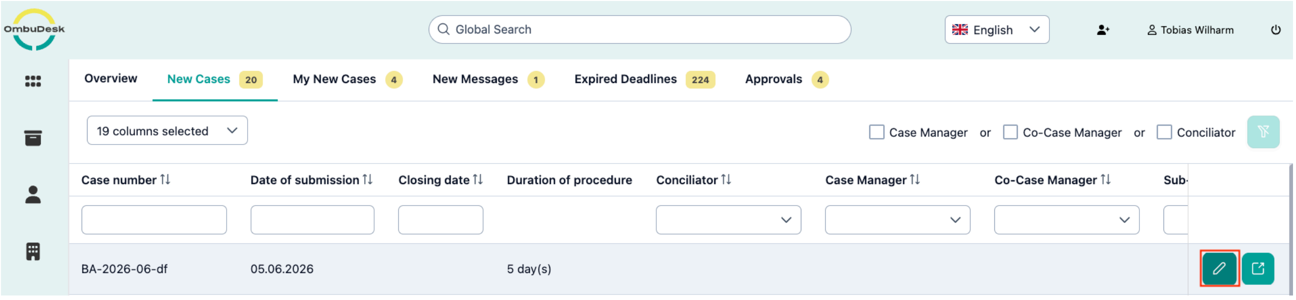
Depending on the assignment principle in your dispute resolution office, administrators can **distribute the new cases** here or case managers/conciliators can **simply assign themselves to new cases**.

If you use an automated assignment principle, this view is empty and can be removed on request.

How does the manual assignment of users to new cases work?

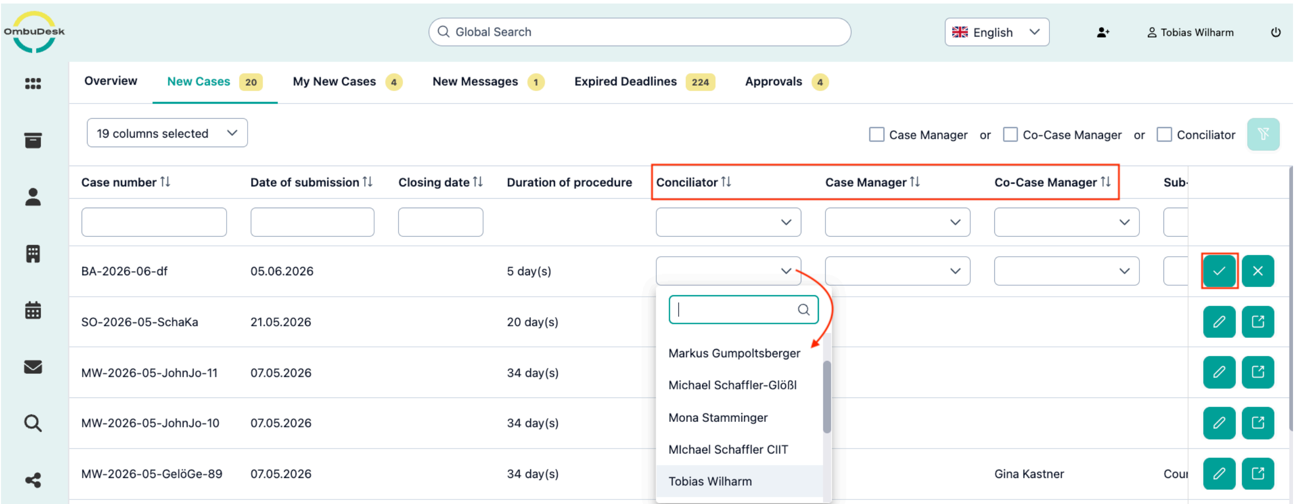
The method for assigning yourself or a colleague to a new case is identical.

1. Click on the **pencil symbol** on the right edge.



2. Select yourself or a colleague from the **selection lists** "Conciliator", "Case Manager" or "Co-Case Manager".

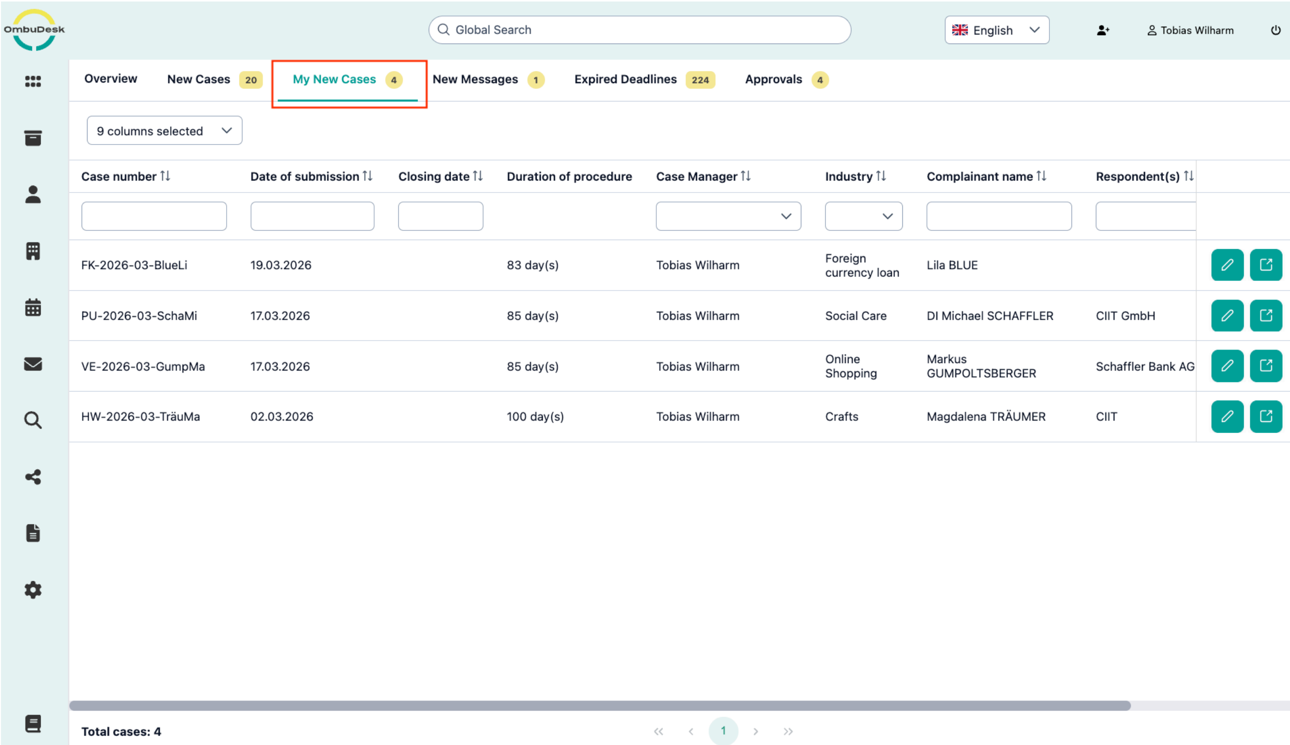
3. Click on the **green checkmark** on the right edge to **save** and assign the new case.



Now the new case disappears from **"New Cases"** and reappears in the **"My New Cases"** tab of yourself or a colleague.

My New Cases

The **"My New Cases"** tab shows you all new cases for which you are responsible as case manager or conciliator - regardless of your assignment principle.



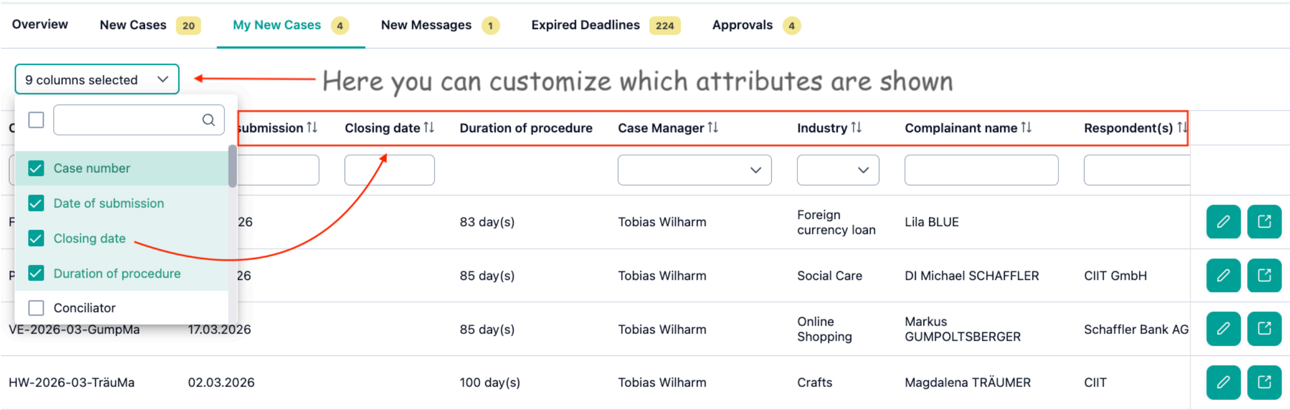
What search and filter functions are available to you in this tab?

You have the possibility to use all data fields as filter and search functions.

You can find the instructions for this in the **Dashboard** section.

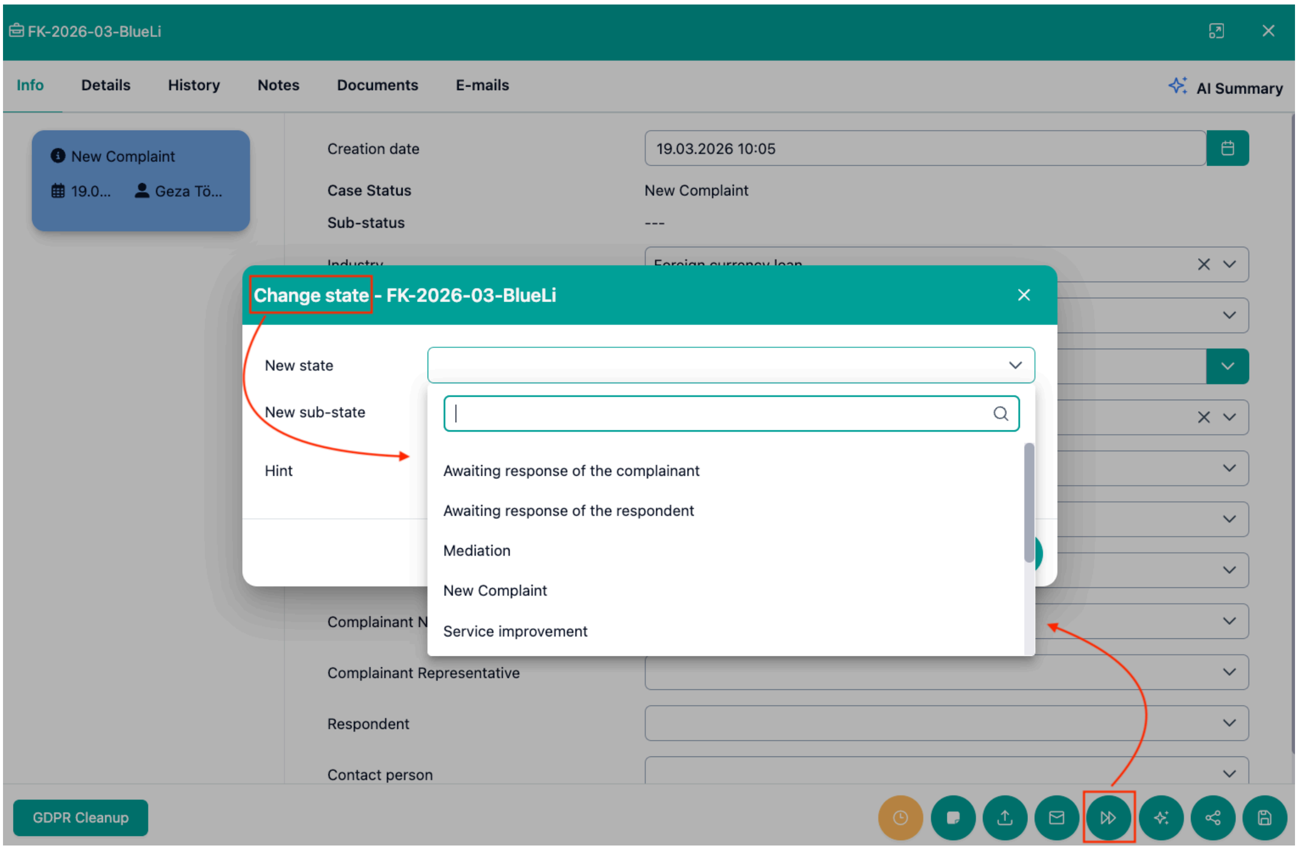
How can you quickly get an overview of your new cases?

You benefit most from the **"My New Cases"** view if you **customize the shown columns** according to your own preferences.



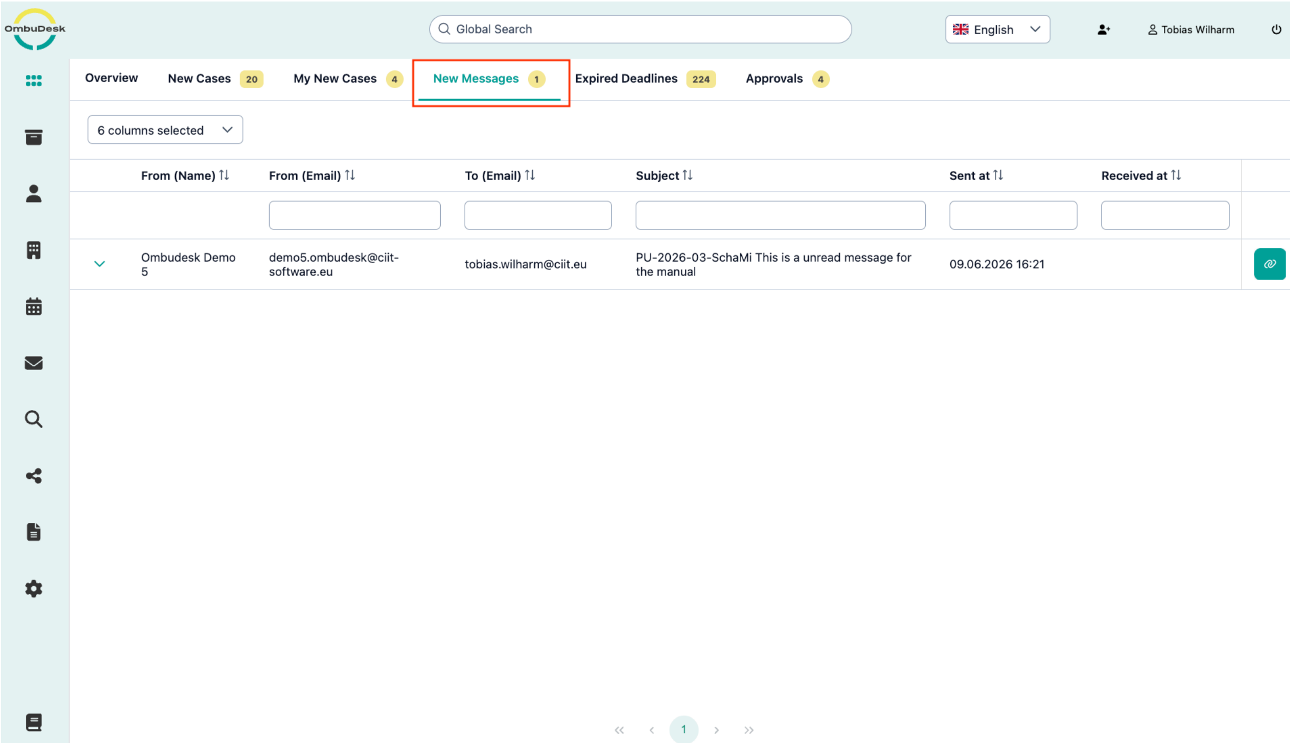
When is a case no longer listed under "My New Cases"?

You will no longer find a case under "My New Cases" as soon as you set the **status** of a case to something other than **"New Complaint"**.



New Messages

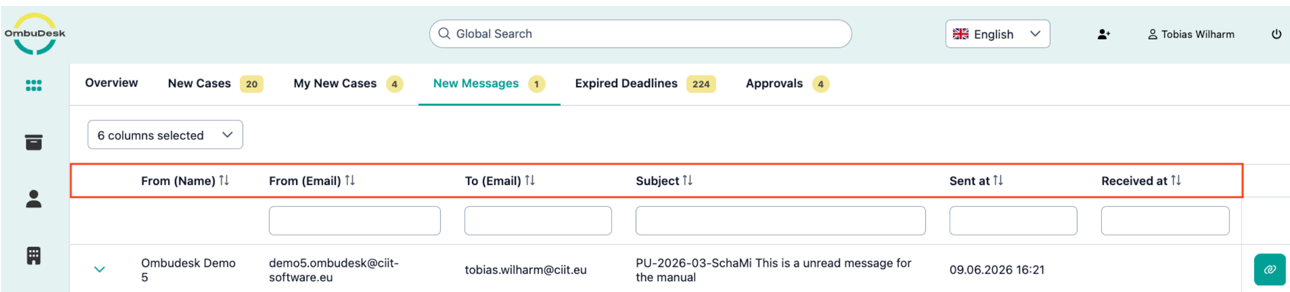
The **"New Messages"** tab shows you all unread messages from your parties that have been automatically assigned to a case by the system.



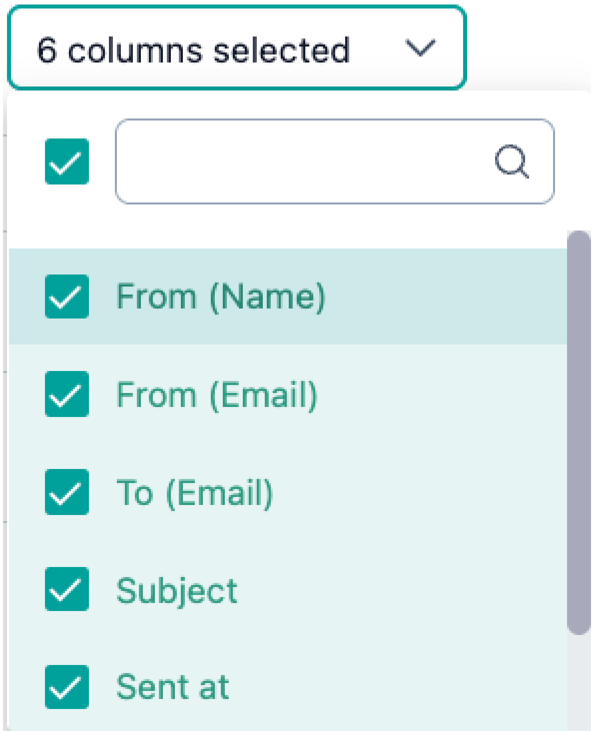
How is the "New Messages" tab structured?

The data page displays 6 different pieces of information about the **new messages** by default:

1. Sender's name - "From (Name)"
2. Sender's email address - "From (Email)"
3. Recipient's email address - "To (Email)
4. "Subject" of the message
5. Send date of the message - "Sent at"
6. Receive date of the message - "Received at"

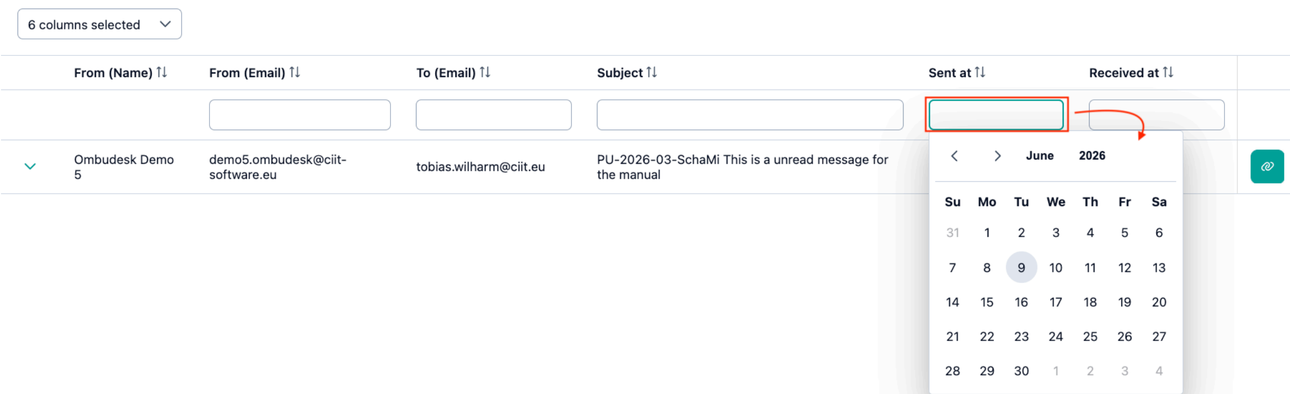


You can change the displayed categories by editing the **selected columns** at the top left.



Which search and filter options are available to you?

You can use the **free text search** for the recipient's email address, the sender's email address, and the subject of a message. Additionally, you can use the **"Sent on"** (send date) and **"Received on"** (receive date) of the new messages to filter the displayed messages by date.

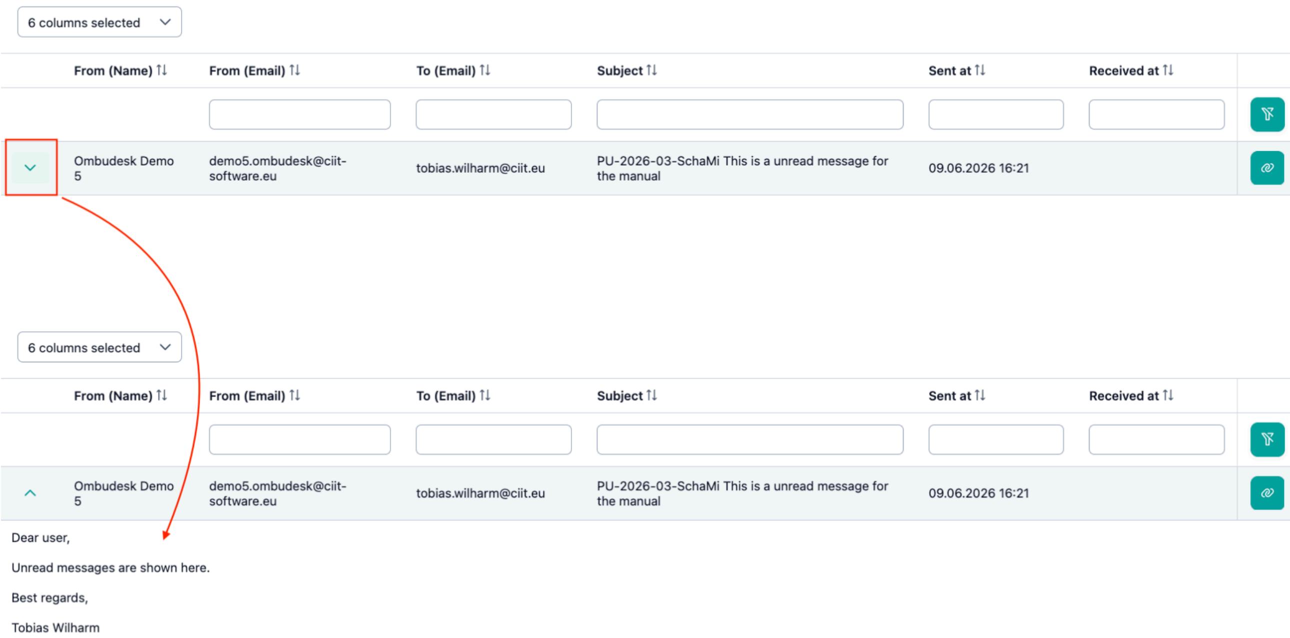


Which quick actions are available to you in "New Messages"?

The following quick actions are available to you in this tab:

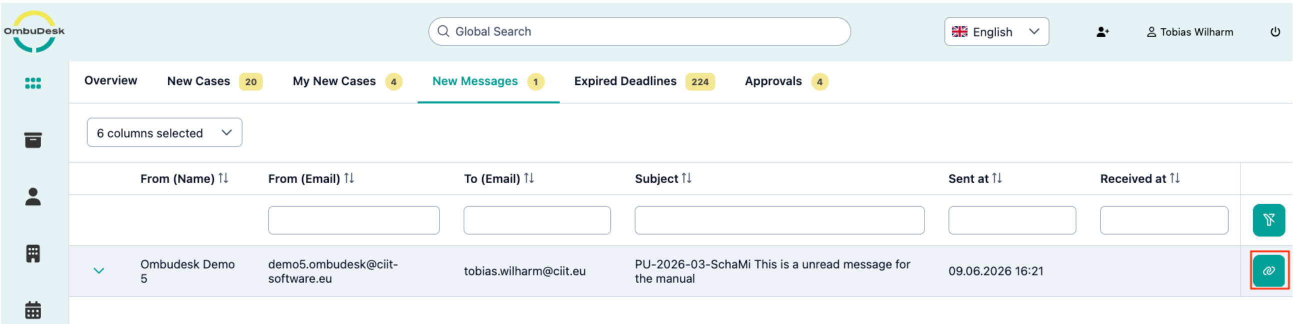
1. **Read message**:

You can read a "new message" by clicking on the **arrow symbol** on the left side.



2. **Open linked case:**

You can navigate directly to the linked case with the new message by clicking the **clip symbol** on the right side.

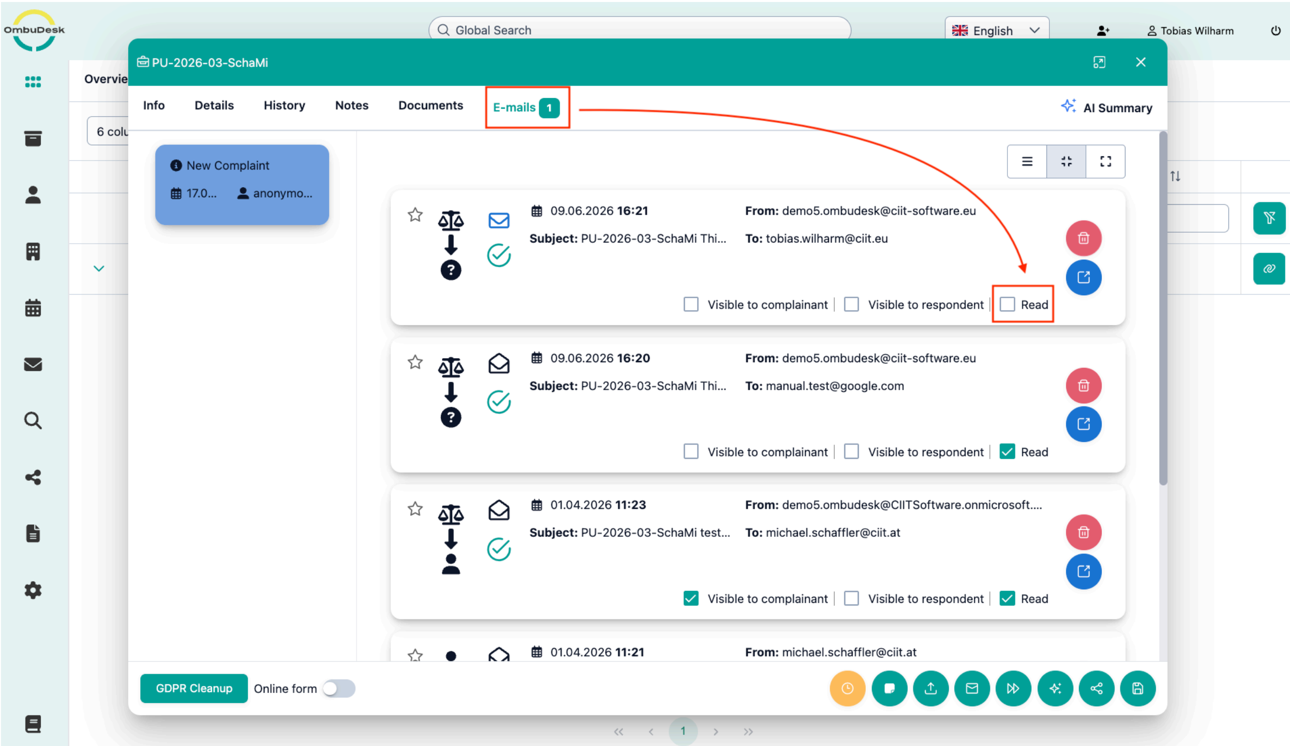


When is a message no longer displayed under "New Messages"?

You can mark a "new message" as **read** to remove the message from the "New Messages" tab.

Follow these steps:

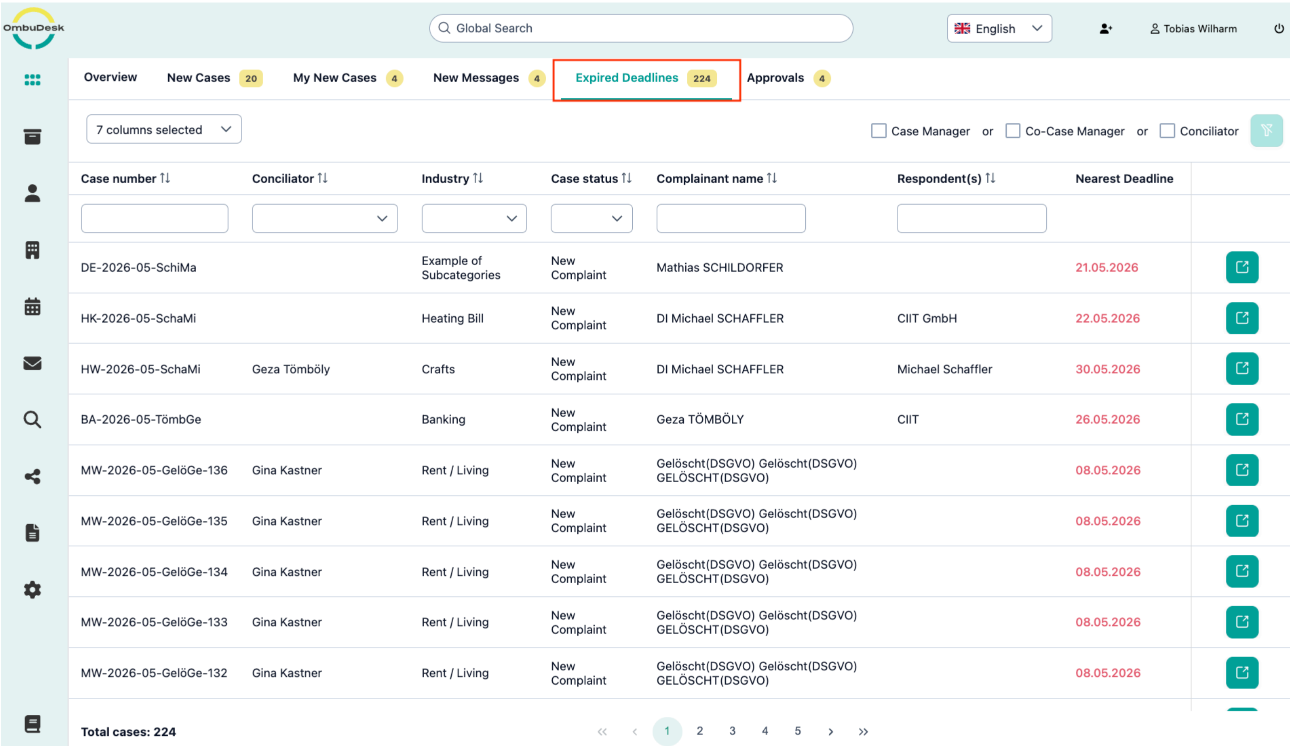
1. Open the digital case file via the **clip symbol** (see "Open linked case" above)
2. Mark a message as read by marking the **"Read"** box
3. Alternatively, you can navigate to the "History-tab" and mark a message as read there.



As soon as you have marked a message as **"read"**, the message disappears from the **"New Messages"** tab.

Expired Deadlines

The **"Expired Deadlines"** tab shows you all cases where a set deadline has passed. This way, you can quickly find cases where action is required.



What search and filter functions are available to you in this tab?

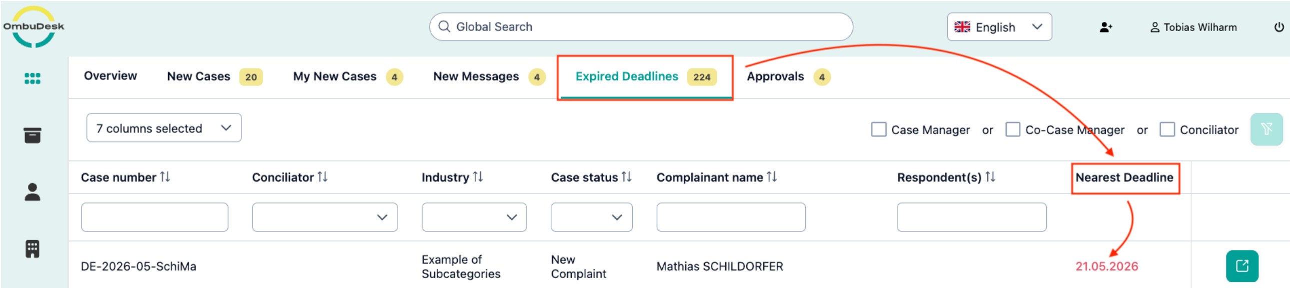
You have the possibility to use all data fields as filter and search functions.

You can find the instructions for this in the **Dashboard** section.

Where can you view the expired deadline of a specific case?

You have two options to view an **expired deadline** of a specific case:

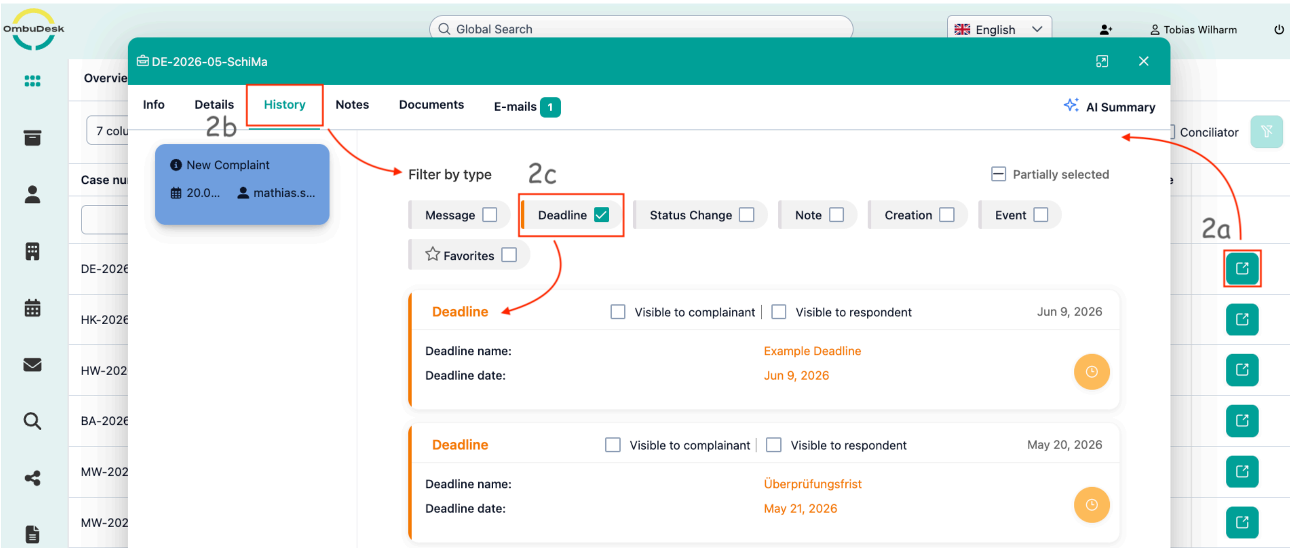
1. Look at the **"nearest deadline"** data field to see the exact date a deadline has expired in a specific case.



2a. Open the digital case file of a case where a deadline has expired using the **arrow symbol** on the far right.

2b. Navigate to the **"History"** tab in the digital case file.

2c. Filter the history for **"Deadlines"** and you will see the **expired deadline** and possibly other deadlines in the case.

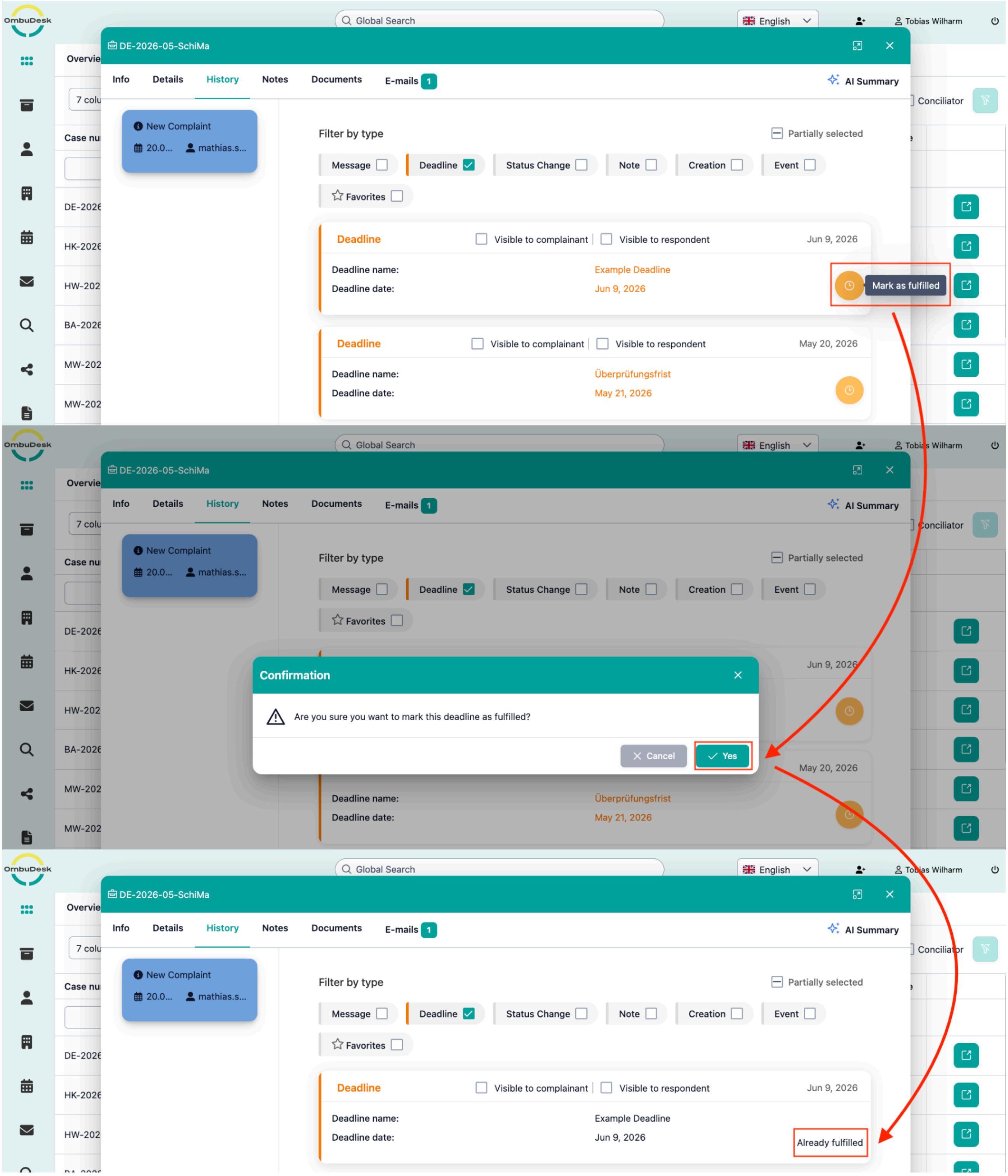


How do you remove an expired deadline from the "Expired Deadlines" tab?

If a party fulfills a task that you have linked to a deadline, the deadline is no longer applicable.

You can mark expired deadlines as **"fulfilled"** and thus remove it from the **"Expired Deadlines"** tab.

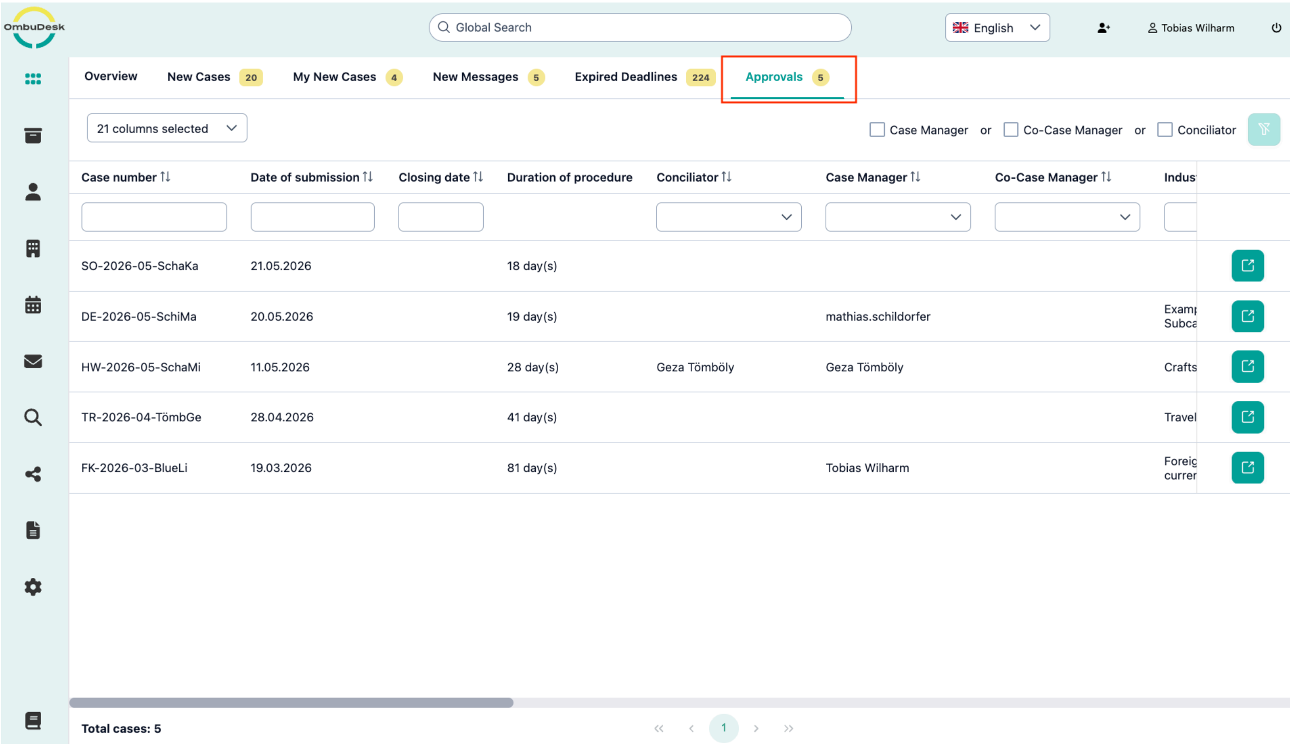
Follow steps **2a-2c** for this. With a click on the orange **"clock symbol"**, you can mark the deadline as fulfilled.



DE-2026-05-SchiMa
Info
Details
History
Notes
Documents
E-mails 1
AI Summary
New Complaint
Filter by type
Partially selected
Message
Deadline
Status Change
Note
Creation
Event
Favorites
Deadline
Visible to complainant
Visible to respondent
Jun 9, 2026
Deadline name:
Example Deadline
Deadline date:
Jun 9, 2026
Mark as fulfilled
May 20, 2026
Überprüfungsfrist
May 21, 2026
Confirmation
Are you sure you want to mark this deadline as fulfilled?
Cancel
Yes
Already fulfilled

Approvals

The **"Approvals"** tab shows all cases in which a message is waiting for approval. This way, you can quickly gain an overview of open approvals.



When is a case displayed in approvals?

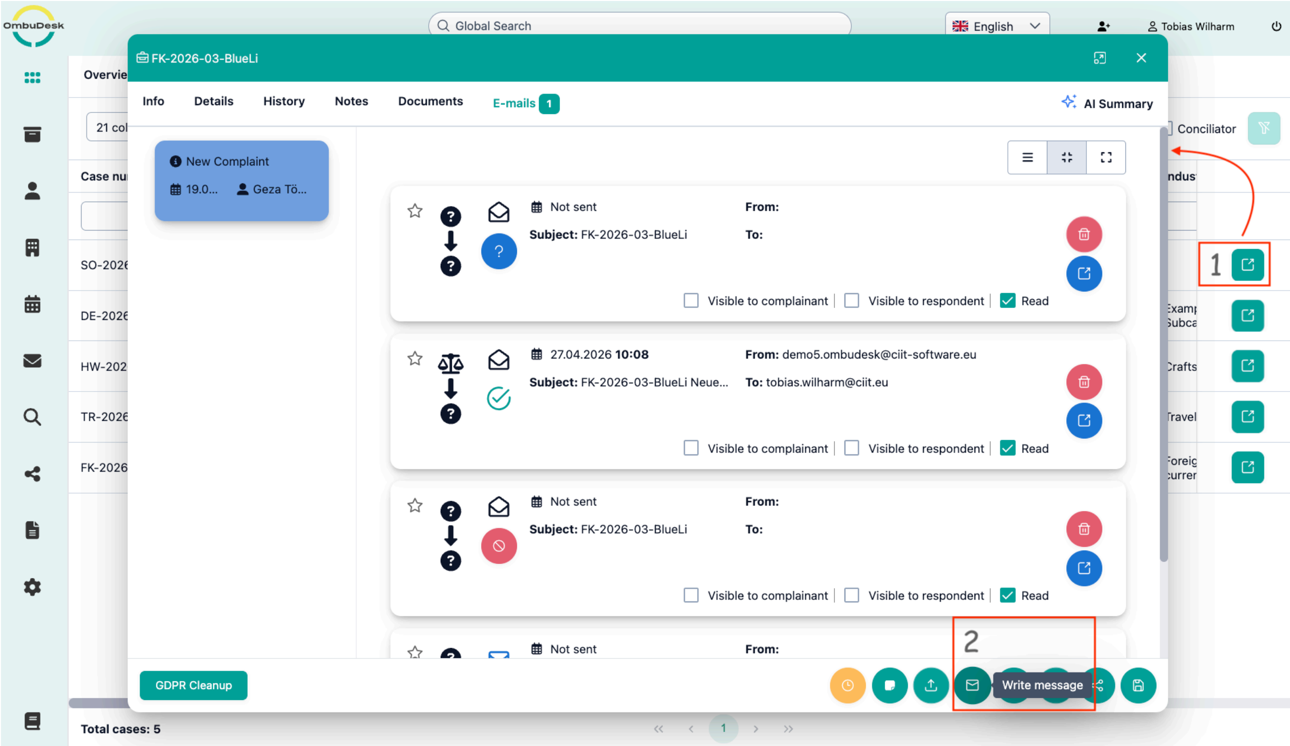
If you are a case manager, you can see all the cases here, in which you've drafted a message that is waiting for approval.

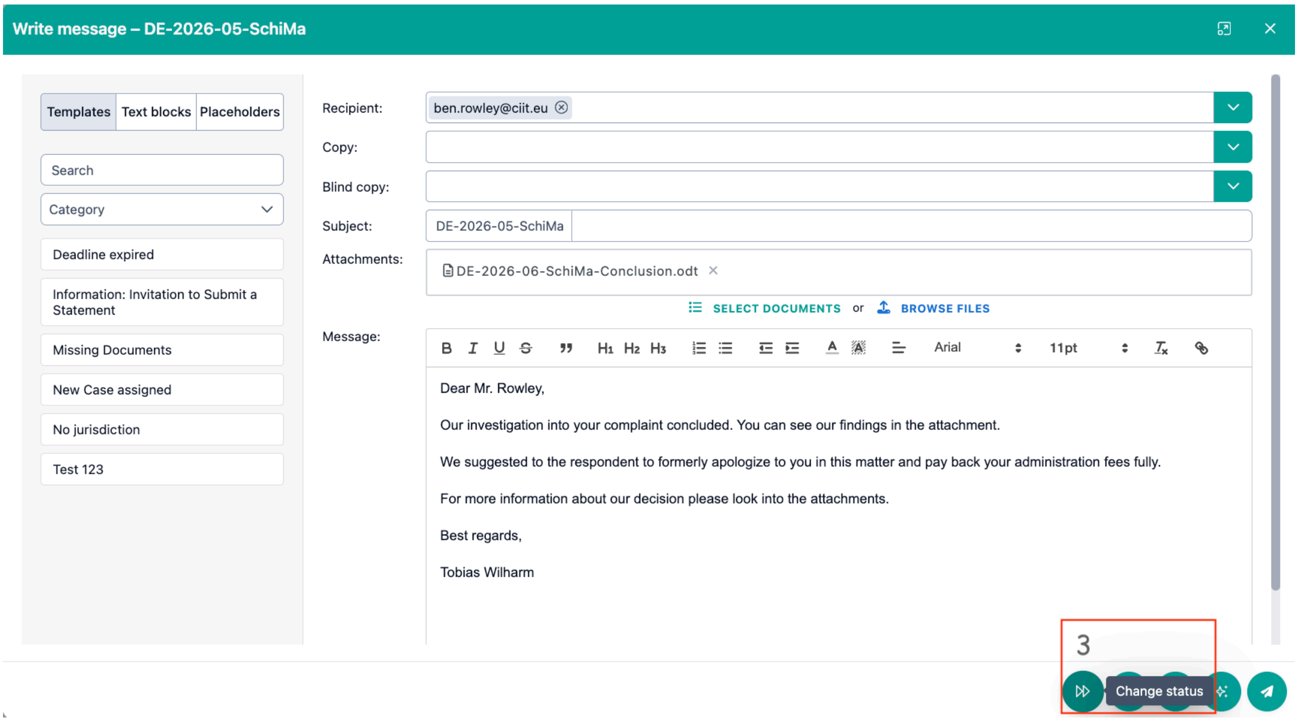
If you have the rights to grant approvals, you will see all cases, in which a message is waiting for your approval.

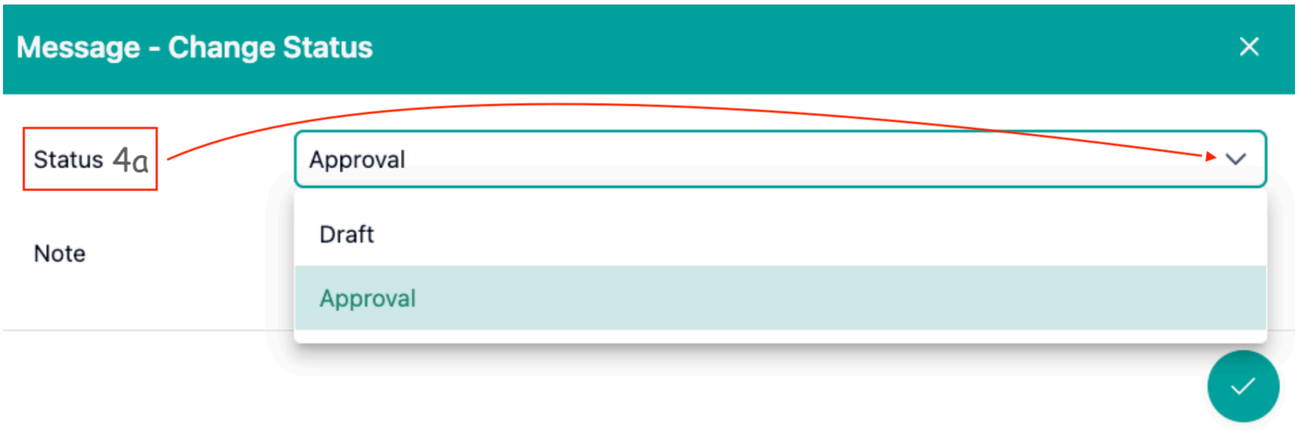
How do you request an approval?

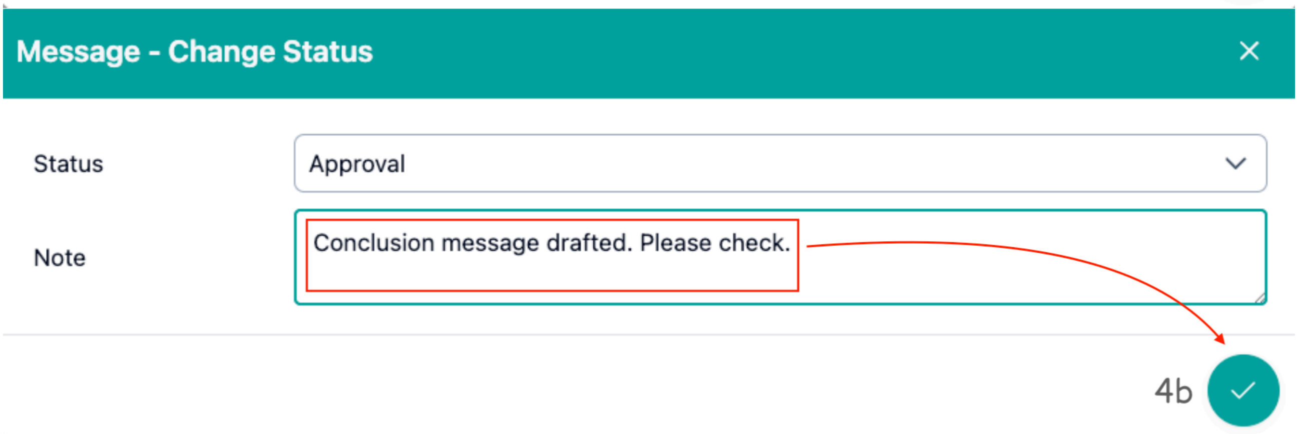
You can submit a message for approval by following these steps:

1. Open a digital case file.
2. Click on the quick action "Write message".
3. Select status change at the bottom.
4. Set the status change to "Approval".


OmbuDesk
Global Search
English
Tobias Wilharm
FK-2026-03-BlueLi
Info
Details
History
Notes
Documents
E-mails 1
AI Summary
New Complaint
Not sent
From:
Subject: FK-2026-03-BlueLi
To:
Visible to complainant
Visible to respondent
Read
27.04.2026 10:08
From: demo5.ombudesk@ciit-software.eu
Subject: FK-2026-03-BlueLi Neue...
To: tobias.wilharm@ciit.eu
GDPR Cleanup
Write message
1
2
Conciliator
Total cases: 5


Write message – DE-2026-05-SchiMa
Templates
Text blocks
Placeholders
Search
Category
Deadline expired
Information: Invitation to Submit a Statement
Missing Documents
New Case assigned
No jurisdiction
Test 123
Recipient:
ben.rowley@ciit.eu
Copy:
Blind copy:
Subject:
DE-2026-05-SchiMa
Attachments:
DE-2026-06-SchiMa-Conclusion.odt
SELECT DOCUMENTS
or
BROWSE FILES
Message:
Arial
11pt
Dear Mr. Rowley,
Our investigation into your complaint concluded. You can see our findings in the attachment.
We suggested to the respondent to formerly apologize to you in this matter and pay back your administration fees fully.
For more information about our decision please look into the attachments.
Best regards,
Tobias Wilharm
3
Change status

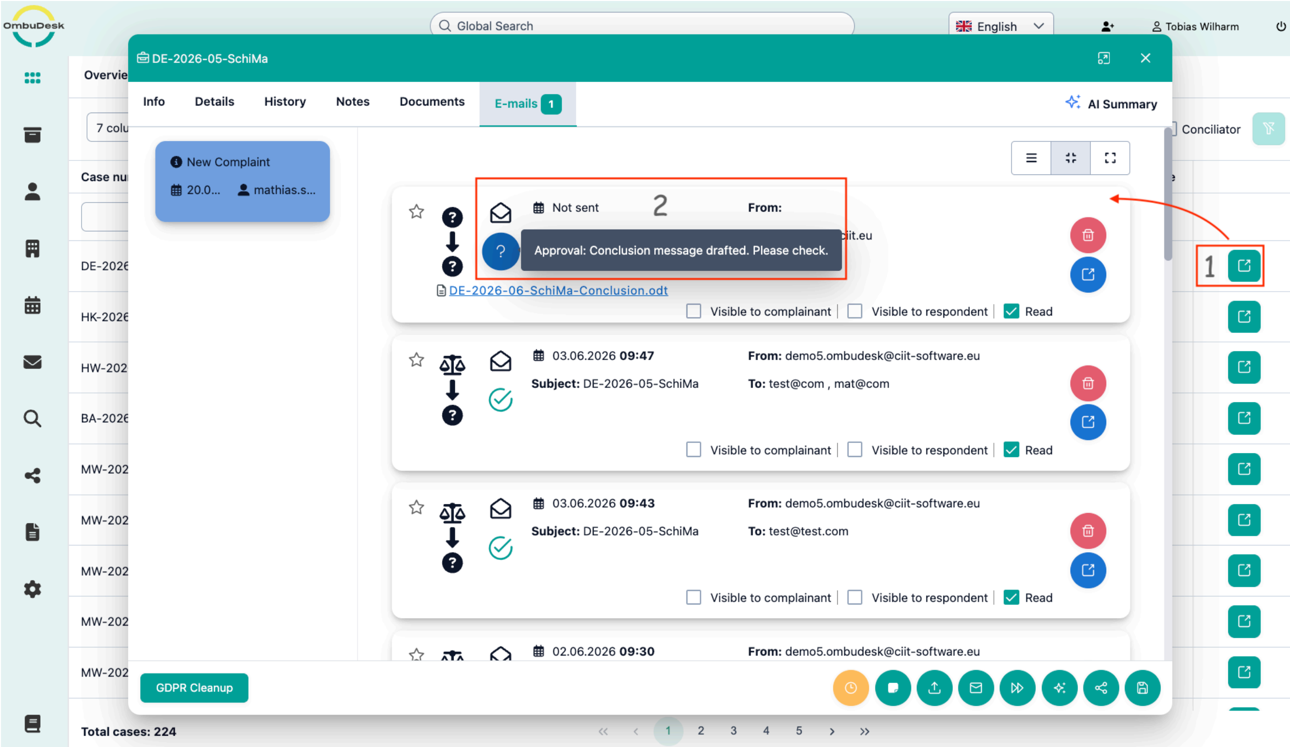


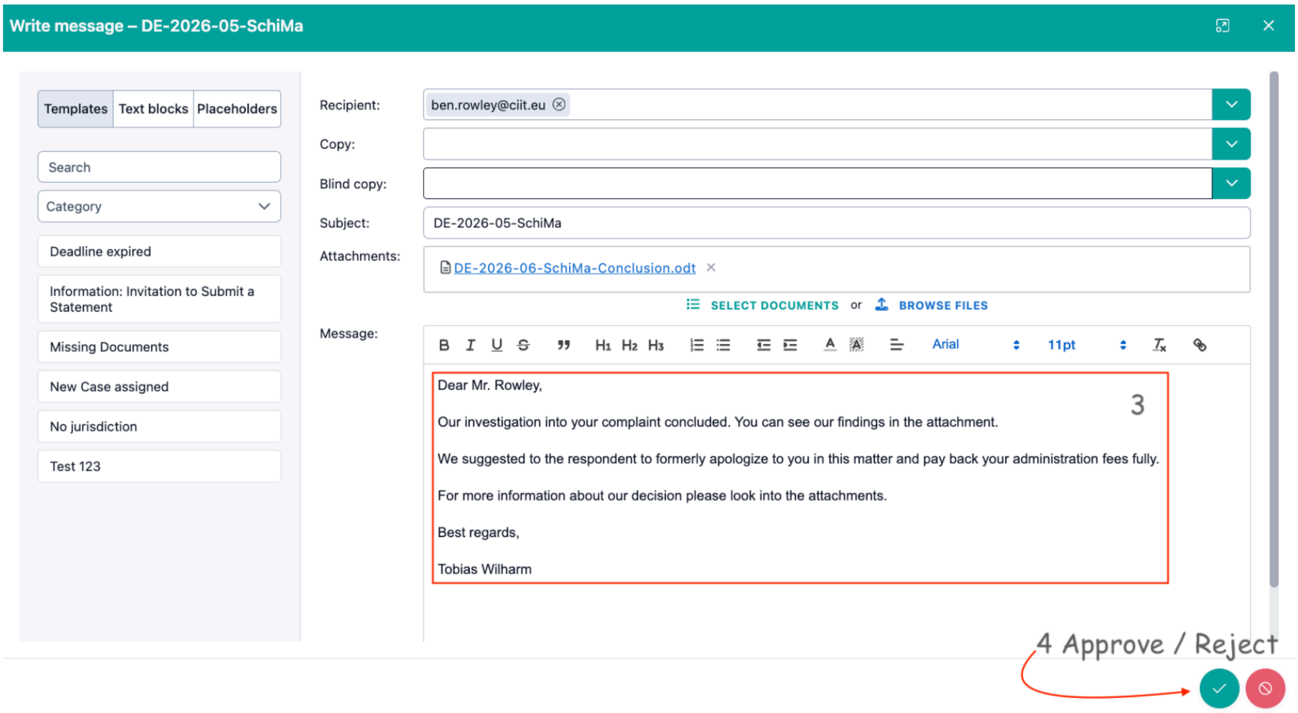


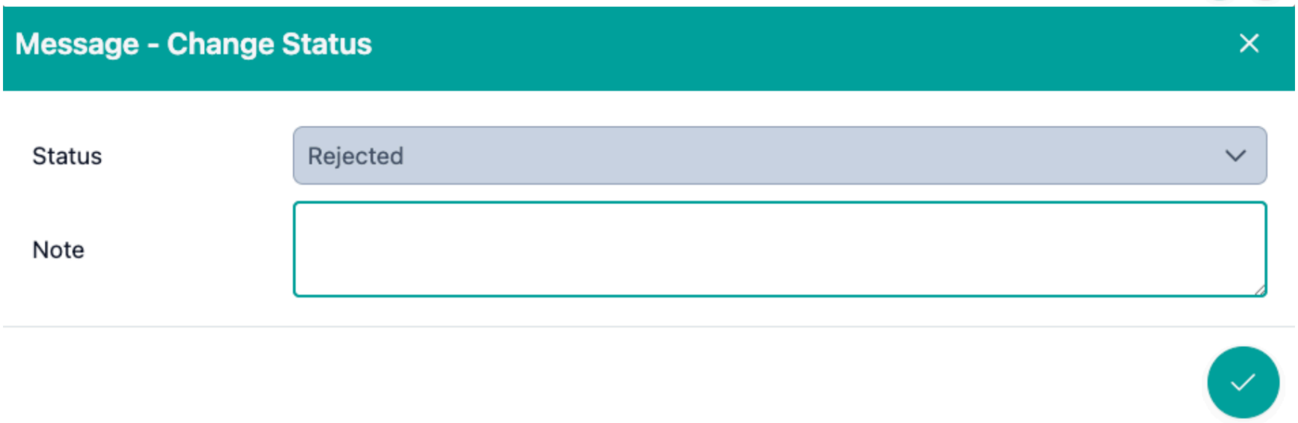
How can you review an approval?

Follow these steps to review an approval:

1. Click on the green arrow symbol to open the email view.
2. Click on the blue question mark to open the message which is waiting for approval.
3. Read the message and correct it – if necessary.
4. Grant or reject approval and provide reason – if necessary.


OmbuDesk
Global Search
English
Tobias Wilharm
DE-2026-05-SchiMa
Info
Details
History
Notes
Documents
E-mails 1
AI Summary
Conciliator
New Complaint
20.0...
mathias.s...
Not sent
2
From:
Approval: Conclusion message drafted. Please check.
DE-2026-06-SchiMa-Conclusion.odt
Visible to complainant
Visible to respondent
Read
1
03.06.2026 09:47
From: demo5.ombudesk@ciit-software.eu
Subject: DE-2026-05-SchiMa
To: test@com , mat@com
03.06.2026 09:43
To: test@test.com
02.06.2026 09:30
GDPR Cleanup
Total cases: 224


Write message – DE-2026-05-SchiMa
Templates
Text blocks
Placeholders
Search
Category
Deadline expired
Information: Invitation to Submit a Statement
Missing Documents
New Case assigned
No jurisdiction
Test 123
Recipient:
ben.rowley@ciit.eu
Copy:
Blind copy:
Subject:
DE-2026-05-SchiMa
Attachments:
DE-2026-06-SchiMa-Conclusion.odt
SELECT DOCUMENTS
or
BROWSE FILES
Message:
Arial
11pt
Dear Mr. Rowley,
3
Our investigation into your complaint concluded. You can see our findings in the attachment.
We suggested to the respondent to formerly apologize to you in this matter and pay back your administration fees fully.
For more information about our decision please look into the attachments.
Best regards,
Tobias Wilharm
4 Approve / Reject


Message - Change Status
Status
Rejected
Note

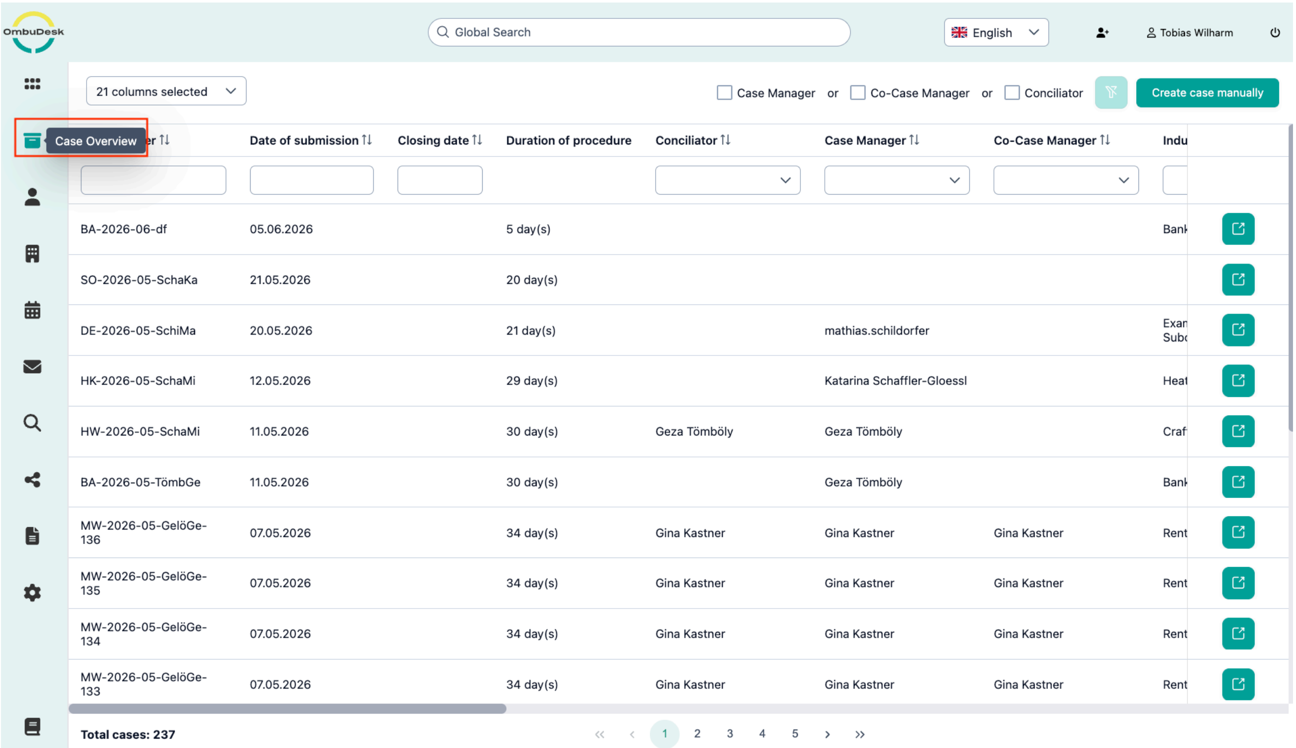
Role-based view

Supervisors see all pending approvals for their team in this list, while case managers can see and track the status of their own drafts here.

Important information: While using a trial environment of OmbuDesk, all users are defined as "superusers". This gives a user all possible rights in the application. That's why you can grant your own approvals and see all drafts sent for approval. The **role-based view** will be established correctly, if you decide to use OmbuDesk.

Case Overview

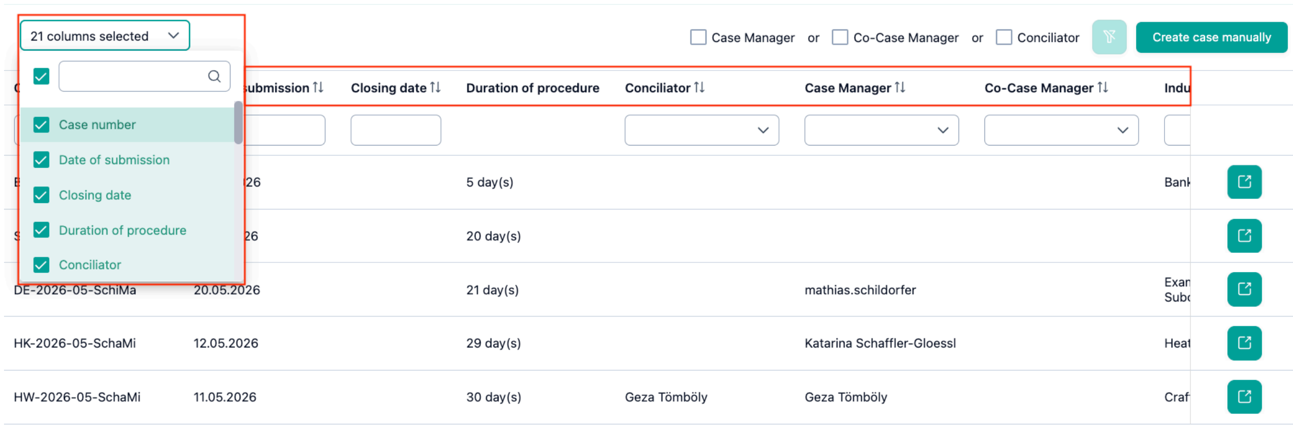
The **Case Overview** is the directory of all existing cases in your system. It offers both a global overview and manual case creation.



How can you customize the case overview to match your preferences?

This case overview uses the standard table structure of OmbuDesk and offering you the following options for customizing:

- **Column Configuration:** Using the button at the top left, you can determine which information should be displayed (e.g., case number, status, complainant, industry).
- **Sorting:** By clicking on the column headers, you can sort the list (e.g., by the newest creation date, alphabetic order, etc.).



How can you filter and find anything in the case overview?

If you are looking for something specific across all registered cases in OmbuDesk, then these filter options are available to you:

1. **Full Text Search:** In text fields such as "Case number" or "Complainant", you can search for names or numbers. The search takes place while you are typing.

2. **Date Filter:** For time fields (e.g., "Created on"), a calendar dialog opens with which you can select time periods.

3. **Dropdown Filter:** For fields such as "Status" or "Industry", you can choose from a list of predefined values.

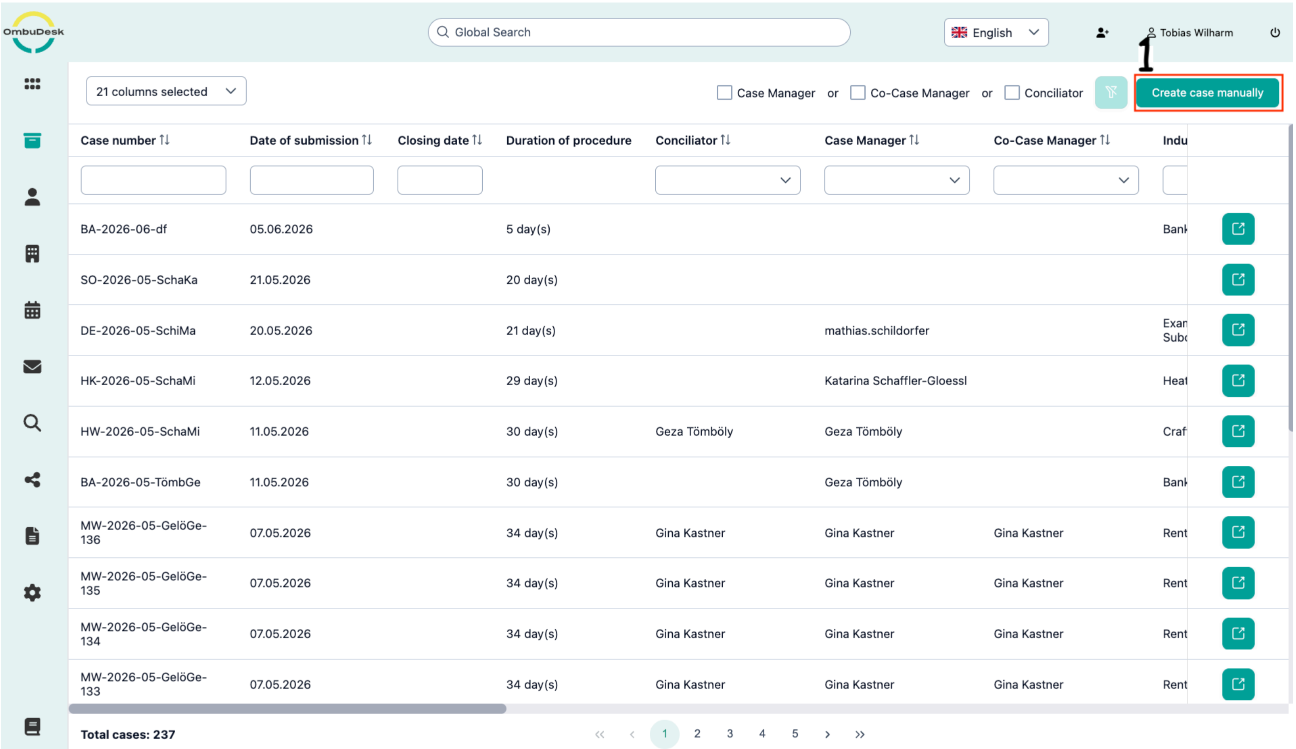
4. **Role Filter:** Above the table, you will find checkboxes ("Case Manager, Co-Case Manager, Conciliator") to only show cases in which you are personally involved.

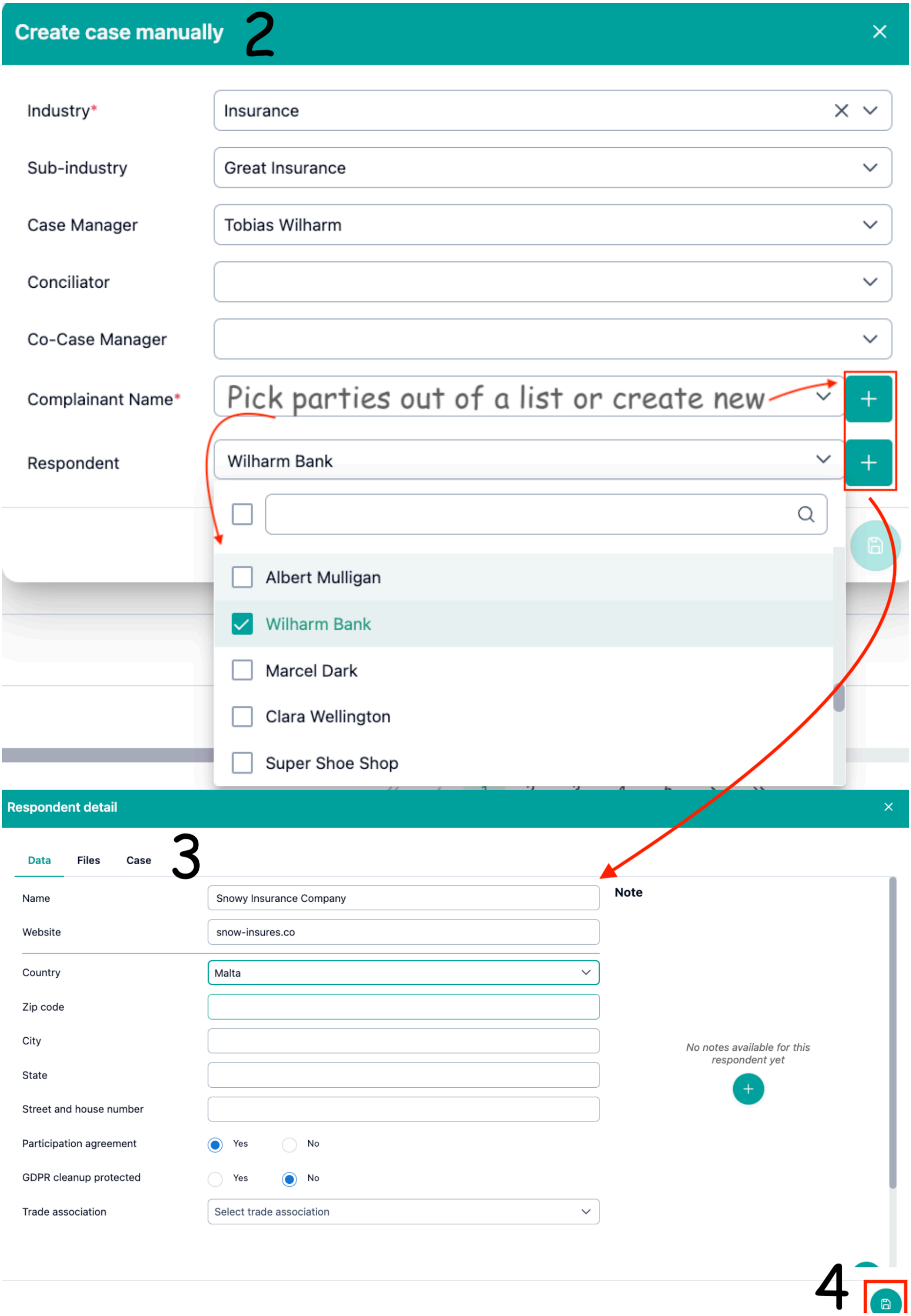
How can you create a case manually?

If a complaint is not submitted via the online form but, for example, by post or telephone, you can record it manually:

1. Click on the **Create case manually** in the top right corner.
2. A dialog opens in which you can record all necessary **data** (master data, industry, assignment).
3. If the party is still unknown, you can create **new complainants and respondents here via the plus symbol**.

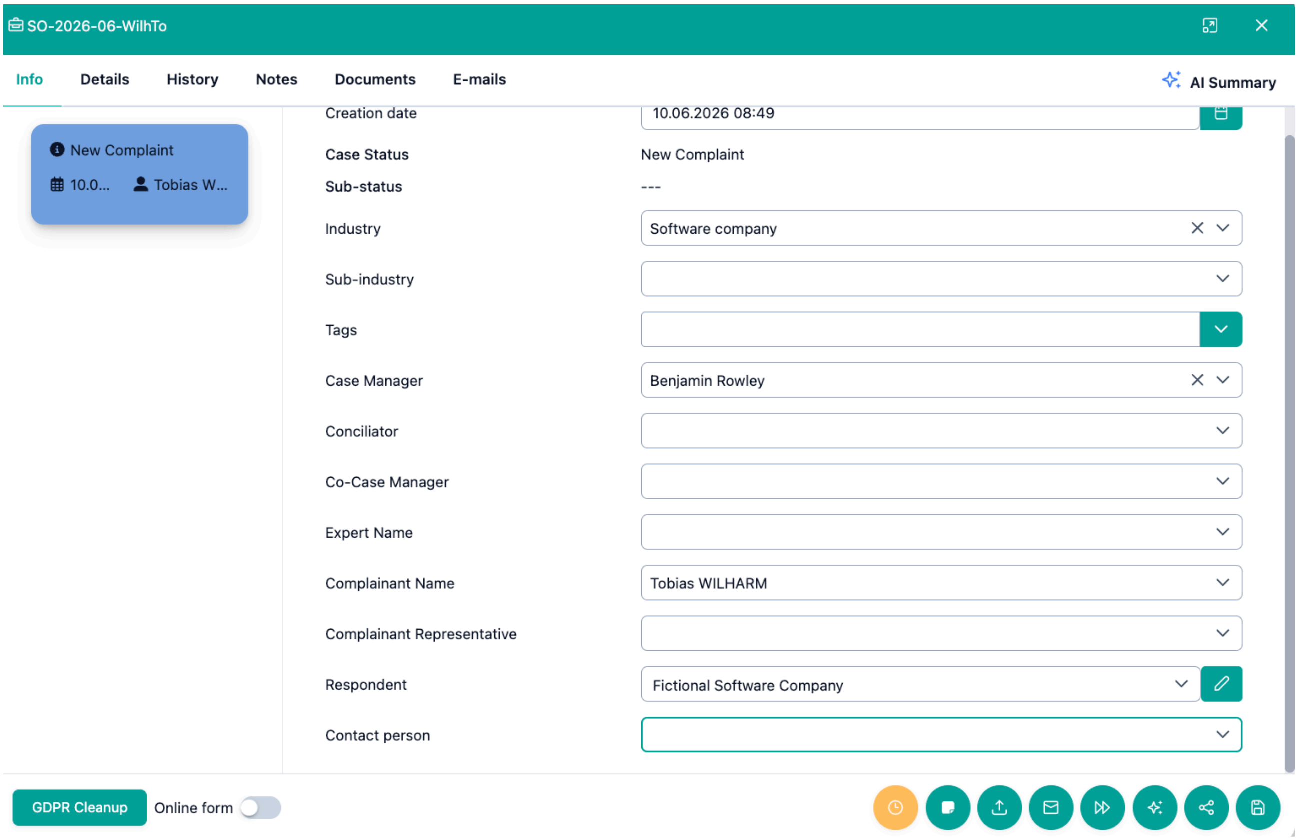
4. After saving, a new case number is generated and the digital case file opens for further processing.




Create case manually
2
Industry*
Insurance
Sub-industry
Great Insurance
Case Manager
Tobias Wilharm
Conciliator
Co-Case Manager
Complainant Name*
Pick parties out of a list or create new
Respondent
Wilharm Bank
Albert Mulligan
Wilharm Bank
Marcel Dark
Clara Wellington
Super Shoe Shop
Respondent detail
Data
Files
Case
3
Name
Snowy Insurance Company
Website
snow-insures.co
Country
Malta
Zip code
City
State
Street and house number
Participation agreement
Yes
No
GDPR cleanup protected
Yes
No
Trade association
Select trade association
Note
No notes available for this respondent yet
4

Digital Case File

The digital case file is the heart of OmbuDesk bundling all information, documents, and communication of a complaint.



How is the digital case file structured?

As soon as you open a case, a window appears that is divided into three areas:

1. **Tab Navigation**

You can switch between the different tabs in the digital case file by clicking on the text (Info, Details, History, etc.).

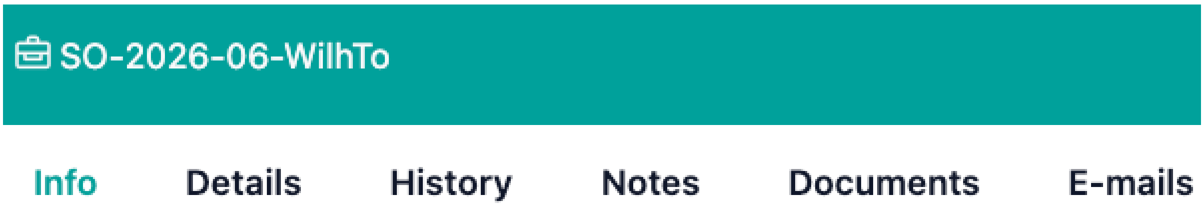
2. **Status History**

You see all status changes that a case has gone through as cards in chronological order.

3. **Quick Actions**

At the bottom right edge of the digital case file, you will find various buttons that offer access to frequently used quick actions.

Tab Navigation



- **Info:** Manage the master data of a case. In addition, you can manually assign colleagues to a case here by selecting a "Case Manager", "Co-Case Manager" or "Conciliator".

- **Details:** Access all customs fields that you can customize on your own in the administration under "Custom fields"

- **History:** See the entire processing history in chronological order – including status changes, messages, deadlines, notes, etc.

- **Notes:** Read all internal notes of a specific case.

- **Documents:** Access all documents added to the case by you or other parties.

- **Emails:** View the entire communication of a case bundled under "Emails".

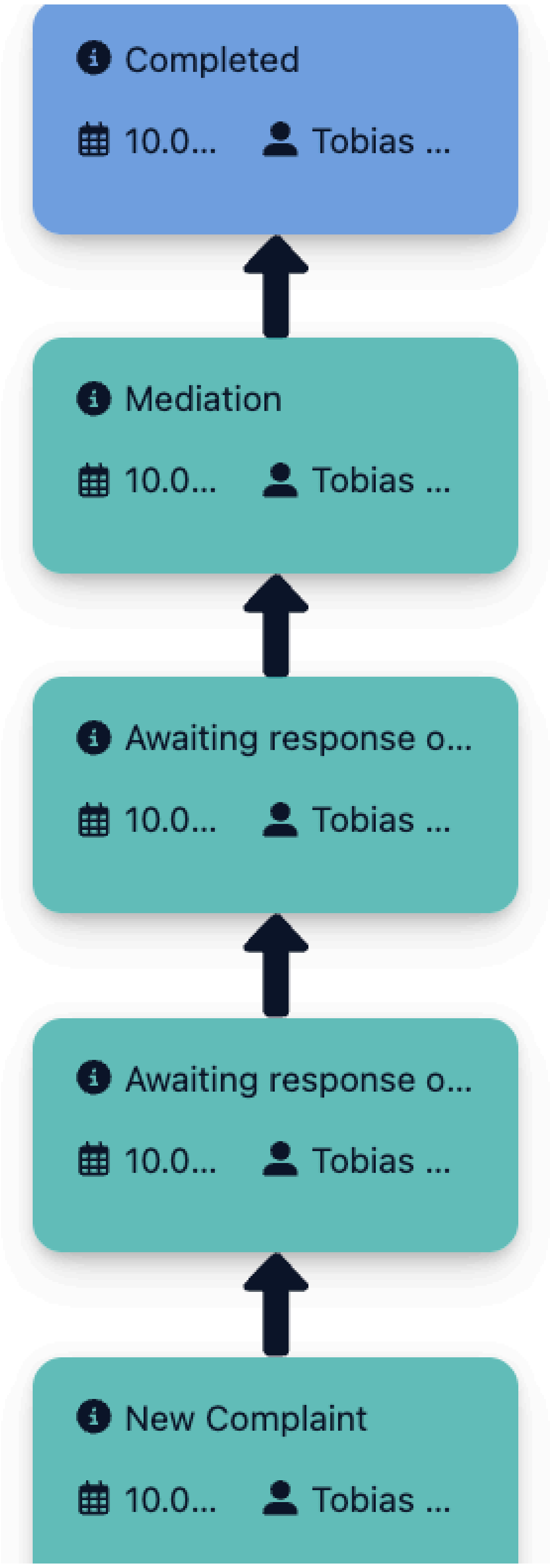
- **AI Summary:** Get a quick overview of a case by reading the AI's short summary.

Status History

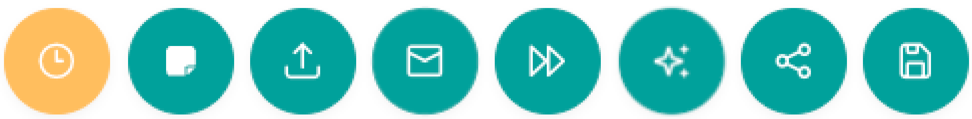
In every digital case file, you will find a history of status changes on the left.

The Status History is showing you the following information:

- **Status description** of the change, e.g.: "New", "Mediation" or "Completed".
- **Timestamp** which shows the date for each status change.
- **Case Manager** which records who made the change.



Quick Actions



The following quick actions are always available to you at the bottom of each digital case file:

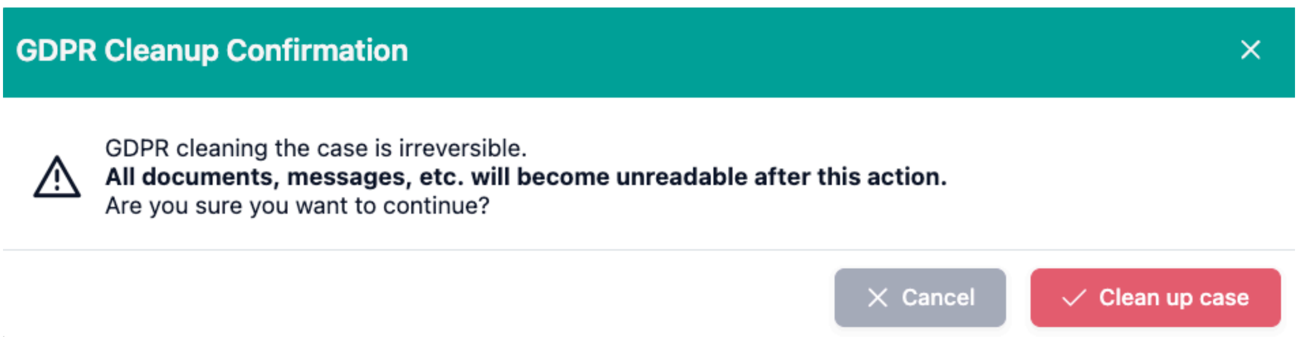
- **Set deadline:** Set a deadline for any point in time, which you can name.
- **Create note:** Create an internal note for the respective case.
- **Upload document:** Upload documents to a case.
- **Write message:** Write a message to one of your parties.
- **Change status:** Change the status of a case according to the current situation.
- **Similarity search:** Find a similar cases in the database.
- **Save:** Save all changes made to a case.

GDPR Cleanup and Online Form View

There are two more buttons at the bottom left in the central case file:

GDPR Cleanup

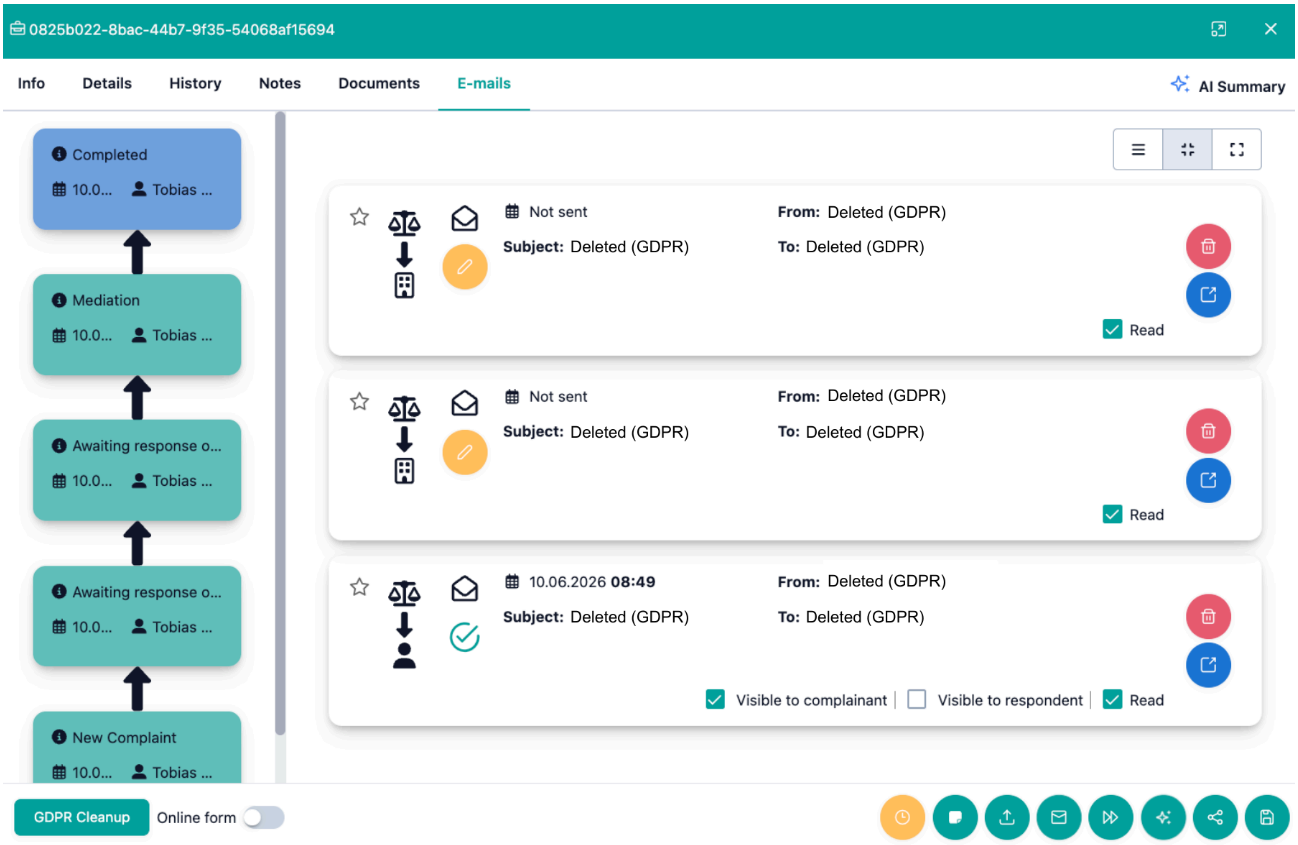
If you click the **"GDPR Cleanup"** button, a dialog opens asking if you want to remove all personal data from the digital case file.



If you confirm the process with **"Clean up case"**, all content in the digital case file that may contain personal data is getting deleted.

This includes, among other things, master data, emails, documents as well as notes.

Warning: This process is irrevocable.

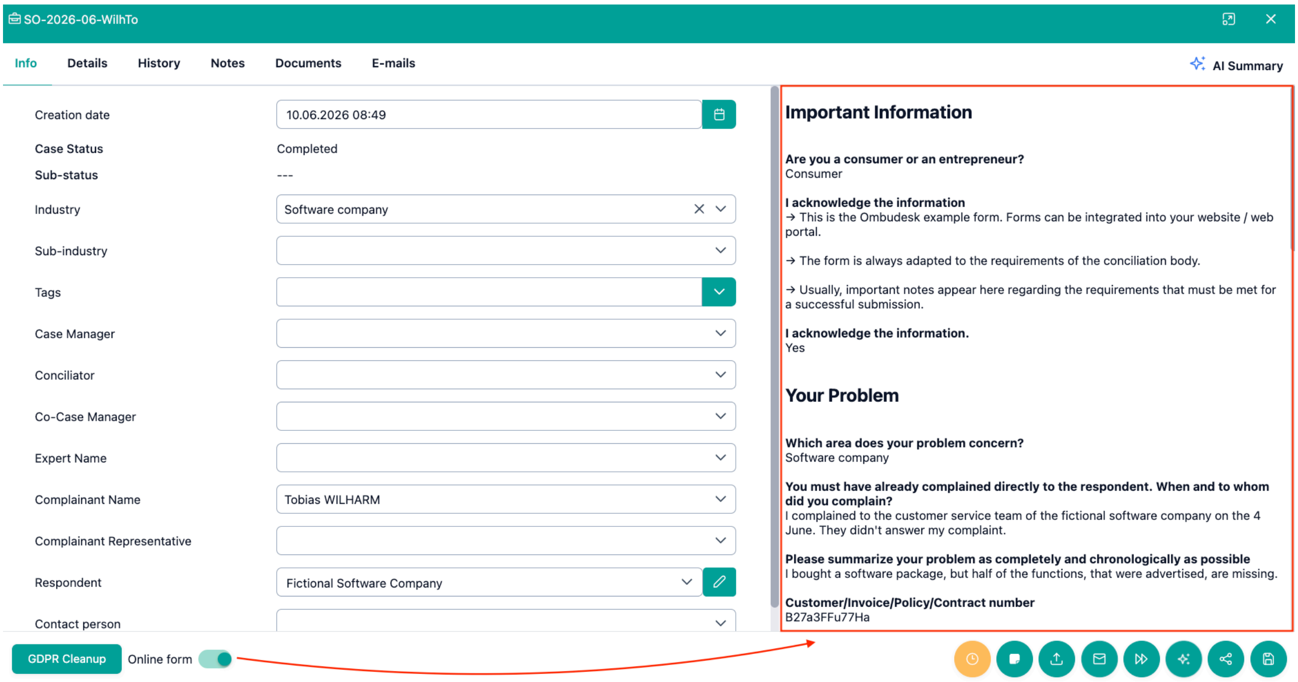


Only a basic framework of the case remains to continue allowing statistical analysis. The creation date, industry and GDPR-protected data fields will be preserved. If you decide to use OmbuDesk, you can name which data should be GDPR-protected.

Online Form

If you flip the switch for the **online form**, OmbuDesk opens the **original application form** with the information filled in by the complainant.

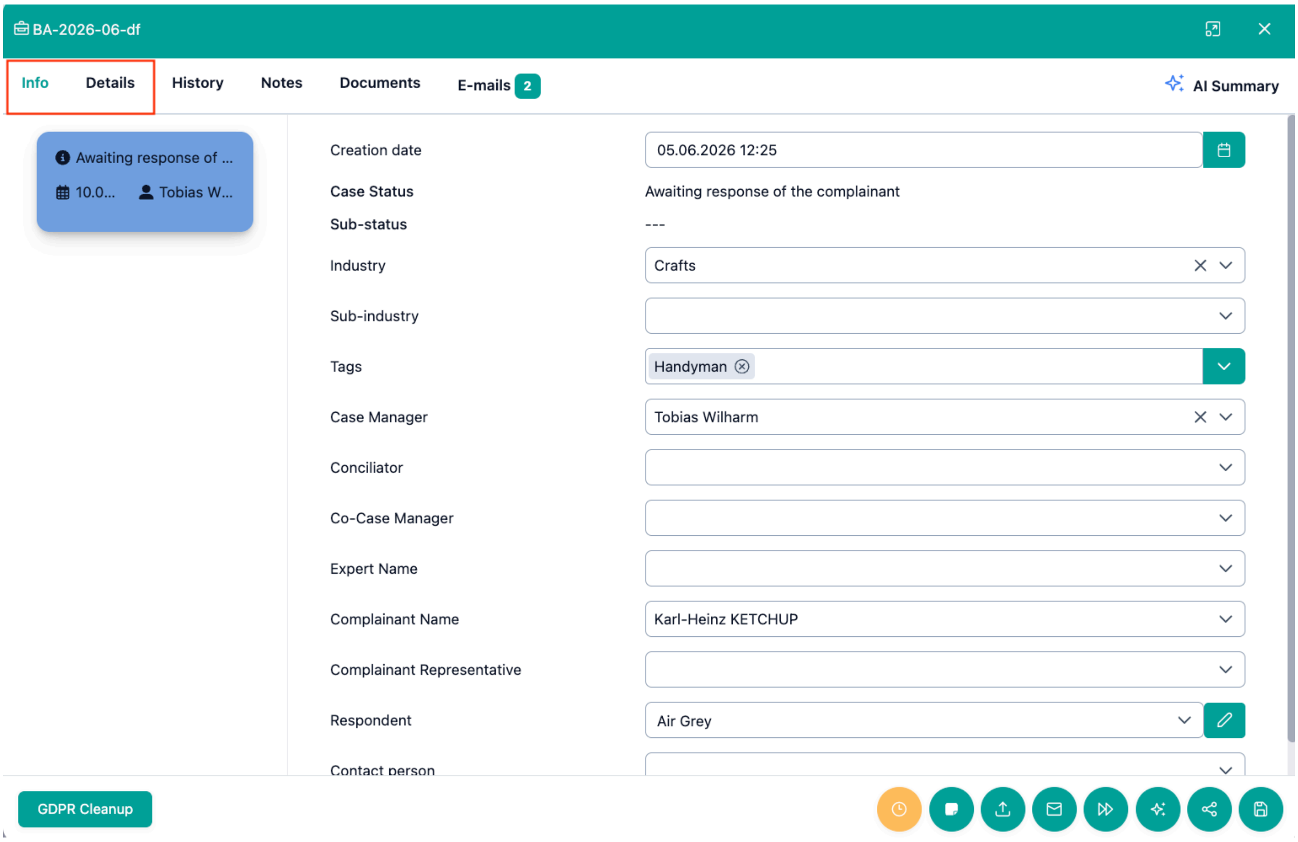
Showing you the following view:


SO-2026-06-WilhTo
Info
Details
History
Notes
Documents
E-mails
AI Summary
Creation date
10.06.2026 08:49
Case Status
Completed
Sub-status

Industry
Software company
Sub-industry
Tags
Case Manager
Conciliator
Co-Case Manager
Expert Name
Complainant Name
Tobias WILHARM
Complainant Representative
Respondent
Fictional Software Company
Contact person
Important Information
Are you a consumer or an entrepreneur?
Consumer
I acknowledge the information
→ This is the Ombudesk example form. Forms can be integrated into your website / web portal.
→ The form is always adapted to the requirements of the conciliation body.
→ Usually, important notes appear here regarding the requirements that must be met for a successful submission.
I acknowledge the information.
Yes
Your Problem
Which area does your problem concern?
Software company
You must have already complained directly to the respondent. When and to whom did you complain?
I complained to the customer service team of the fictional software company on the 4 June. They didn't answer my complaint.
Please summarize your problem as completely and chronologically as possible
I bought a software package, but half of the functions, that were advertised, are missing.
Customer/Invoice/Policy/Contract number
B27a3FFu77Ha
GDPR Cleanup
Online form

Info & Details

In the central case file, you will find the **Info** and **Details** tabs in the first and second positions. Here you can manage master data and use custom fields.



Which data fields do you find in the Info tab?

The Info tab bundles the following information about a case in OmbuDesk:

- **Basic Data:**
  - Creation date
  - Case status / Sub-status
  - Industry / Sub-industry
  - Tags
- **Master Data**:
  - Name of the complainant
  - Representative of the complainant
  - Name of the respondent
  - Contact person at the respondent

- **Responsibilities**
    - Case Manager
    - Co-Case Manager
    - Conciliator

Purpose of the tab

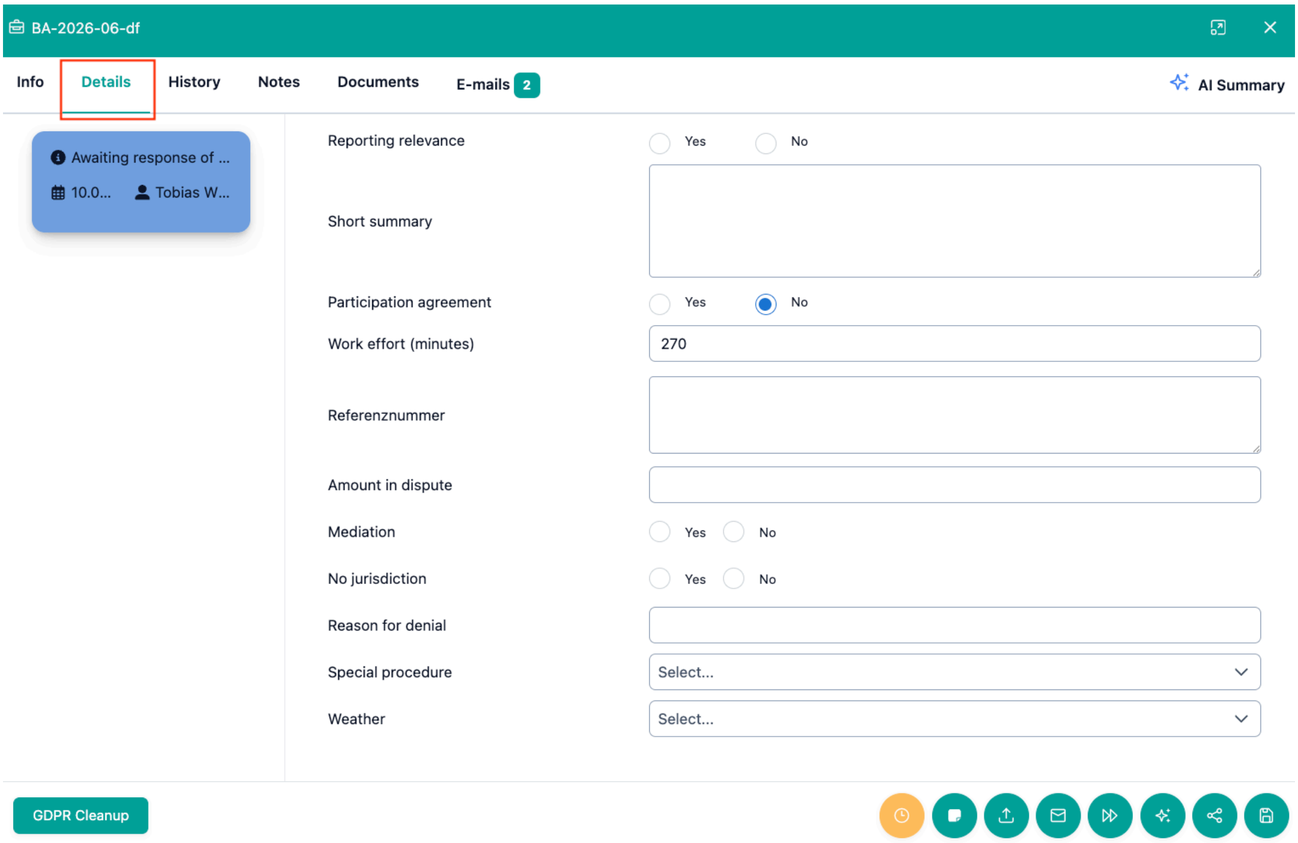
The **Basic Data** provides an overview of the case and allows you to correct the (sub) industry at any time if necessary.

The **Master Data** contains all personal data for a case in OmbuDesk.

The **Responsibilities** show the employees responsible for this case in your dispute resolution office.

All **responsibility fields** are drop-down menus, which gives you the option to manually assign cases or make changes to the responsibilities.

Which data fields do you find in "Details"?



Every data field in **Details** can be customized by you in the **settings**. The customizing options are explained in the linked settings area.

The following examples of data fields in "Details" give you a first glance of your options:

- **Reporting relevance:** Use a Yes/No selection to determine whether this case should be included in the official reports (e.g., for supervisory authorities).
- **Short summary:** A text field where you can note down information about the case.
- **Participation agreement:** Yes/No selection documenting whether the parties have agreed to the process of dispute resolution.
- **Work effort (minutes):** Automated time tracking. The time spent in a case file is recorded every 60 seconds.
- **Reference number:** A free text field for file numbers of respondents or other external references.
- **Special Procedure:** A drop-down menu that allows you to select various special procedures.

Fields that have been added to this specific test environment:

- **Amount in dispute:** Numeric field that lets you note down the amount in dispute.
- **Mediation:** Yes/No selection to determine if a mediation attempt is in progress.
- **No jurisdiction:** Yes/No selection to mark down if a case falls under your jurisdiction or not.
- **Reason for denial:**: Simple text field that allows you to note down the reason for a denial of service.
- **Weather**: Example of a drop-down menu with different whether states.

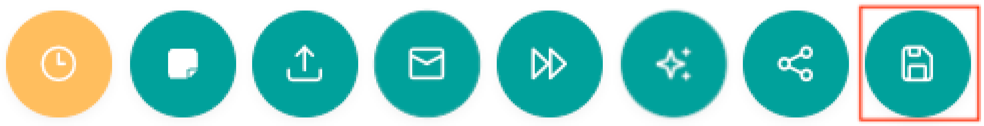
Purpose of the tab

In the **Details** tab, you can freely add or remove fields that you need or no longer need for processing your cases.

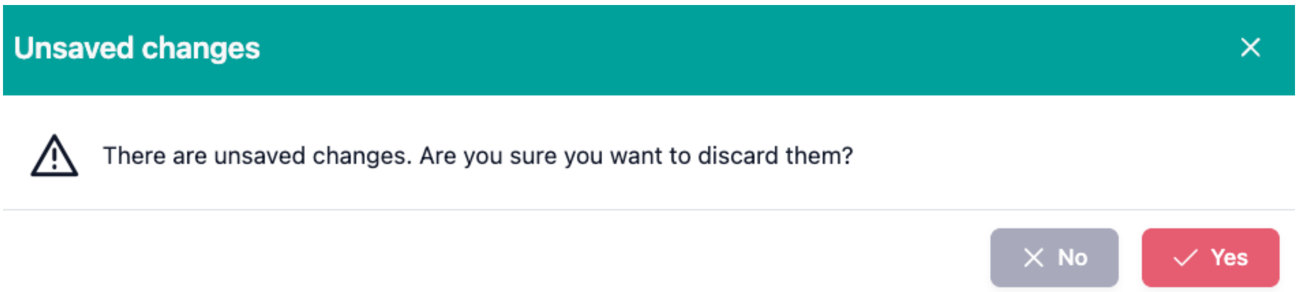
How can you save changes in the info or details tab?

When you make changes in the **Info tab** or in **Details**, they only become valid after saving.

You can save your changes at any time at the bottom right, via the cassette symbol, which is at the last position of the quick actions.

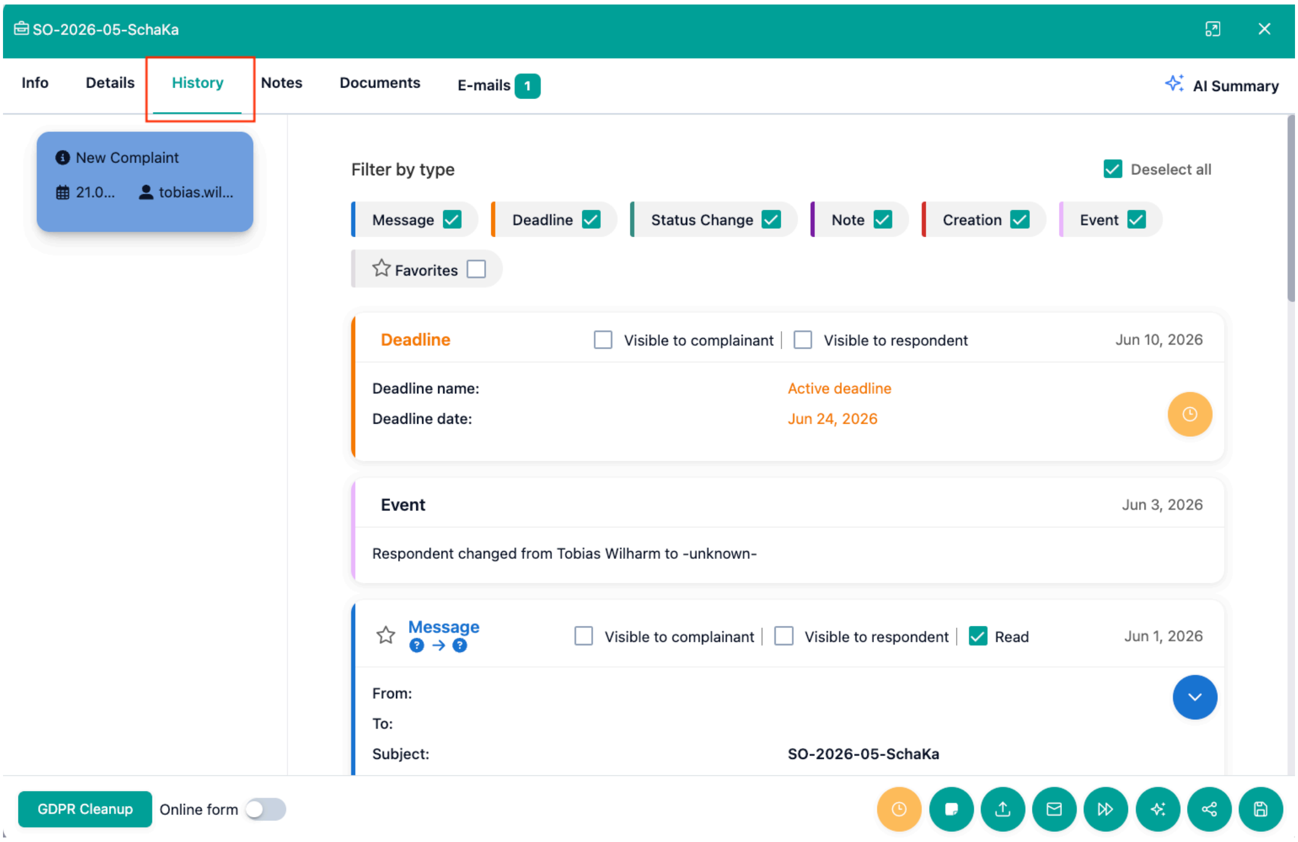


If you have unsaved changes, when closing the digital case file, you will be asked if you want to save the changes.



History & Notes

In the third and fourth positions in your digital case file, you will find the **History** and **Notes** tabs.



How is the History tab structured?

The history shows you a complete and **chronological documentation** of all events concerning the open case.

You will find the following case events in the history:

- **Messages** are listed chronologically and can be viewed. You can change the visibility for the parties in the portal and mark a message as "Read".
- **Deadlines** are displayed in the history with their name and date and can be marked as fulfilled.
- **Status changes** show the previous and new status as well as the date of the change.

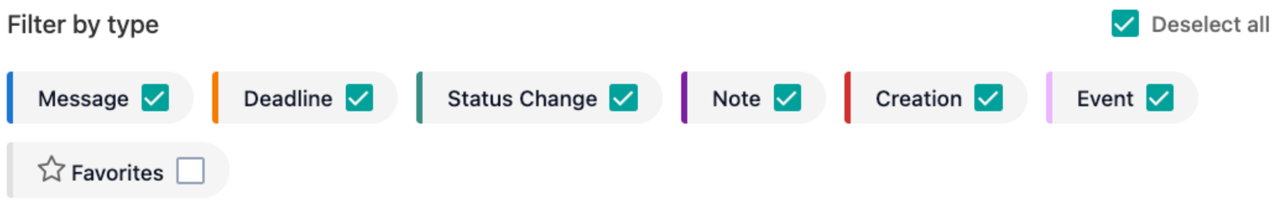
- **Notes** also appear in the history showing the creation date, the creator, and the content of the note.

- **Creation** records the date on which the case reached your dispute resolution body.

- **Favorites** can be important messages or notes that you have marked as a favorite via the star symbol.

How can you filter the events in the History tab?

Above the history, you will find all **event types**, and to the right of each, a checkbox.

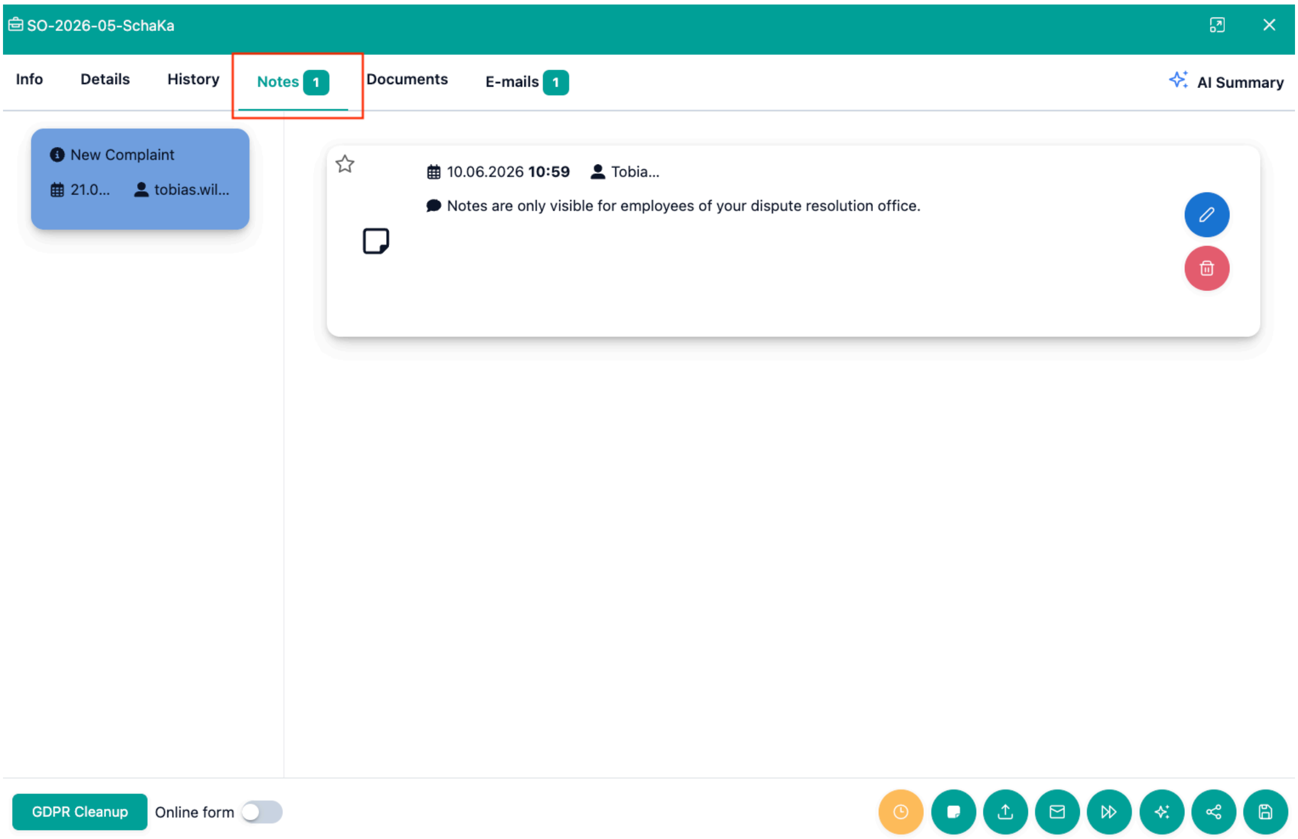


If you add or remove the checkmark from a box with a click, these event types will appear or disappear in the history.

This way, you can quickly filter the history to get an overview.

None of the filter options affect each other, except for the **Favorites filter**. If you filter by this, only events marked as favorites will be displayed.

How does the Notes tab function?



You can create internal notes that are **not** visible to any external parties.

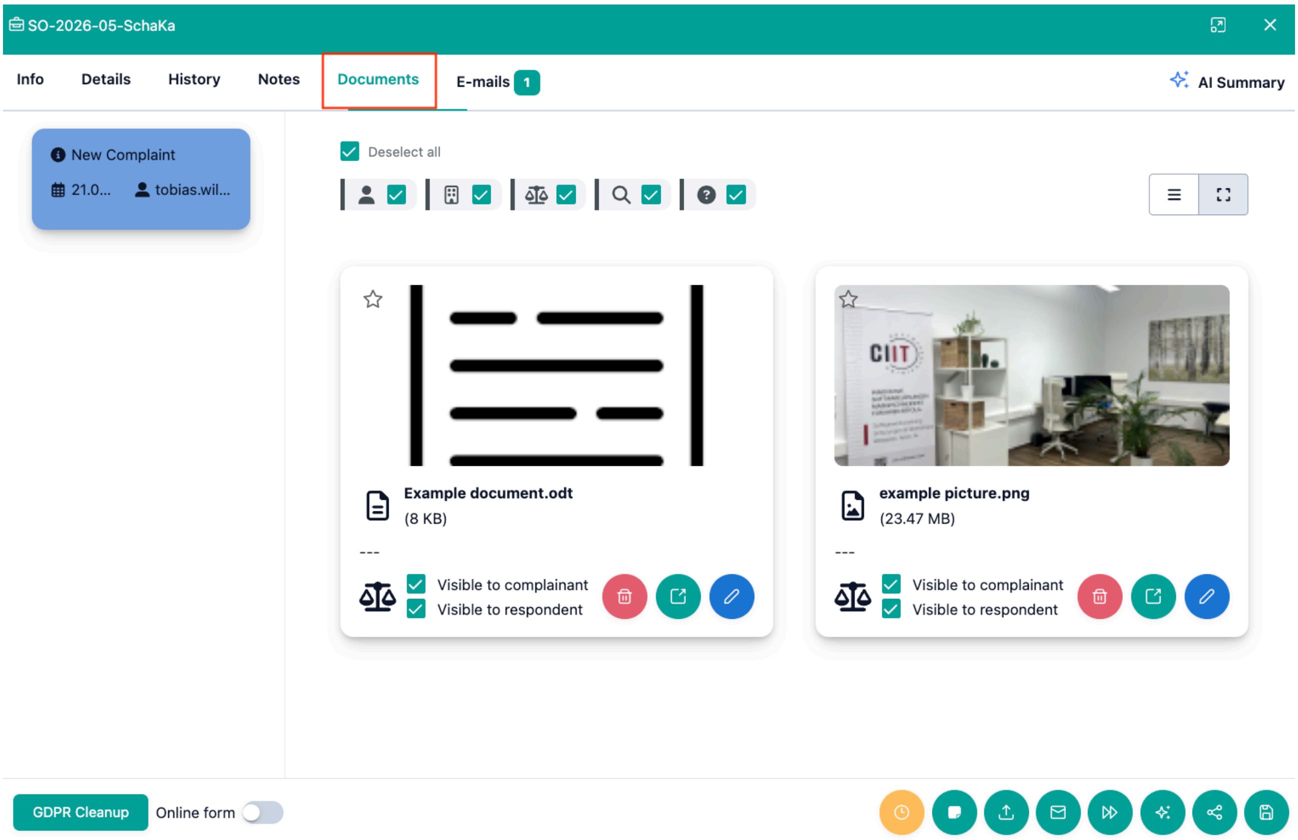
- **Create note:** You can create a note via the quick actions at the bottom right.
- **Content:** You can fill in the free text field and determine whether it is a **simple note** or a note due to a **phone call**.
- **Edit/Delete:** You can change or remove your own notes.
- **Information:** Each note shows you information about the author, the creation date, and, if applicable, the edit date.

Documents

The **Documents** tab shows you all documents in the digital case file that belong to a case.

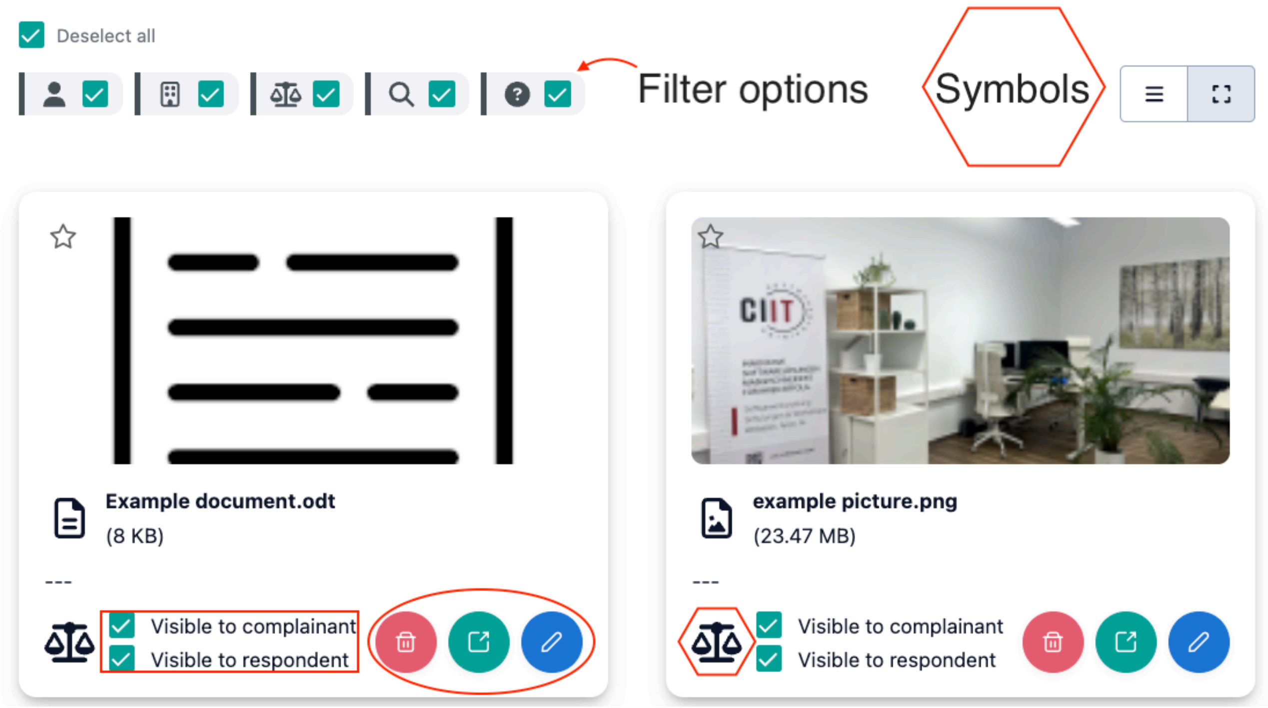
Here, all documents are brought together that were either part of the application form or were sent by you or one of the other parties in the course of the procedure.

Additionally, you can use the document tab as storage to upload documents and release them for one or both other parties via the visibility button.



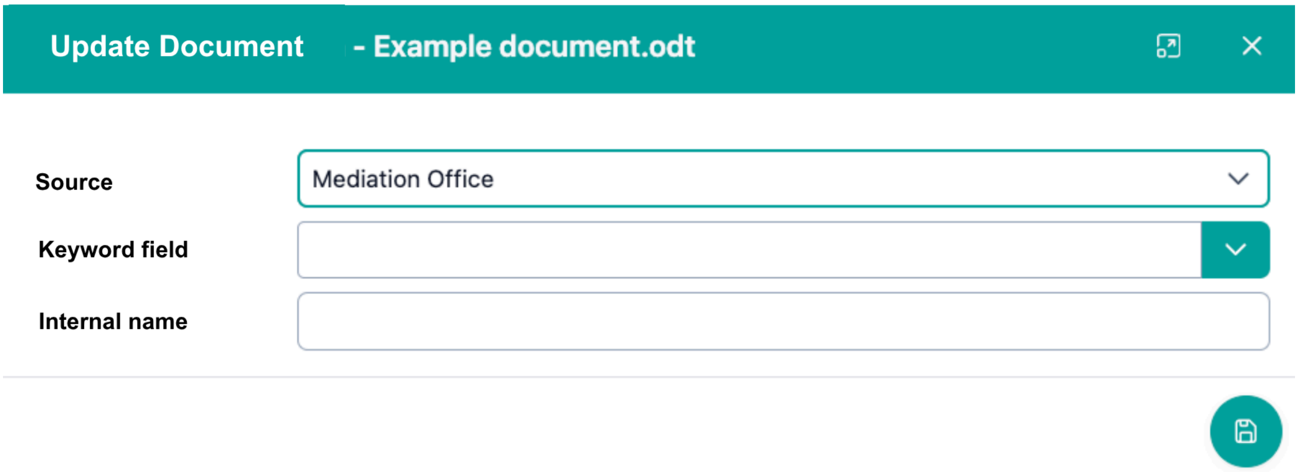
How is the document view structured?

All documents of a case are shown as cards that include the following information:

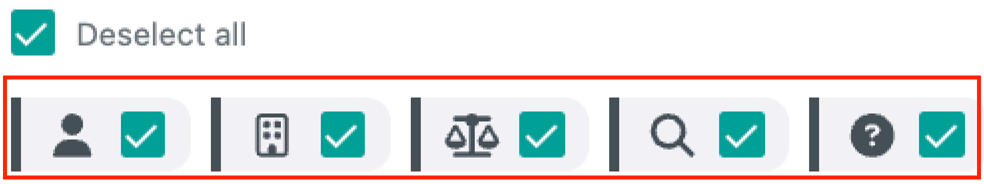


- **File name:** Name of the file (e.g.: "Example document.odt").
- **Symbol image:** Shows you at a glance whether you or the complainant or respondent uploaded the document (**Scale icon** = Dispute resolution office; and Complainant/Respondent = **User icon**).
- **File size:** Size of the file (e.g.: 8 KB)
- **Visibility:** Management of the visibility of documents in the portal for the complainant or respondent via buttons.
- **Filter:** You can filter documents by the parties who uploaded them (Complainant, Respondent, Dispute Resolution Office, Expert, Unknown)
- **Actions:** You can **delete documents** with the red trash can symbol, **open** them with the green arrow symbol, and **edit** them with the blue pencil symbol.

When you edit a document, you can change the **source** of the document, add **keywords**, or assign an internal **name**:



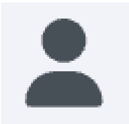
What do the symbols stand for?



You can see symbols or pictograms in OmbuDesk to recognize at a glance who, for example, uploaded a document or **who** wrote a message to **whom** in the history or email view.

The following **symbols** or **pictograms** are used in OmbuDesk:

This symbol image represents the **complainant**:



This symbol image represents the **respondent**:

This symbol image represents your **dispute resolution office**:

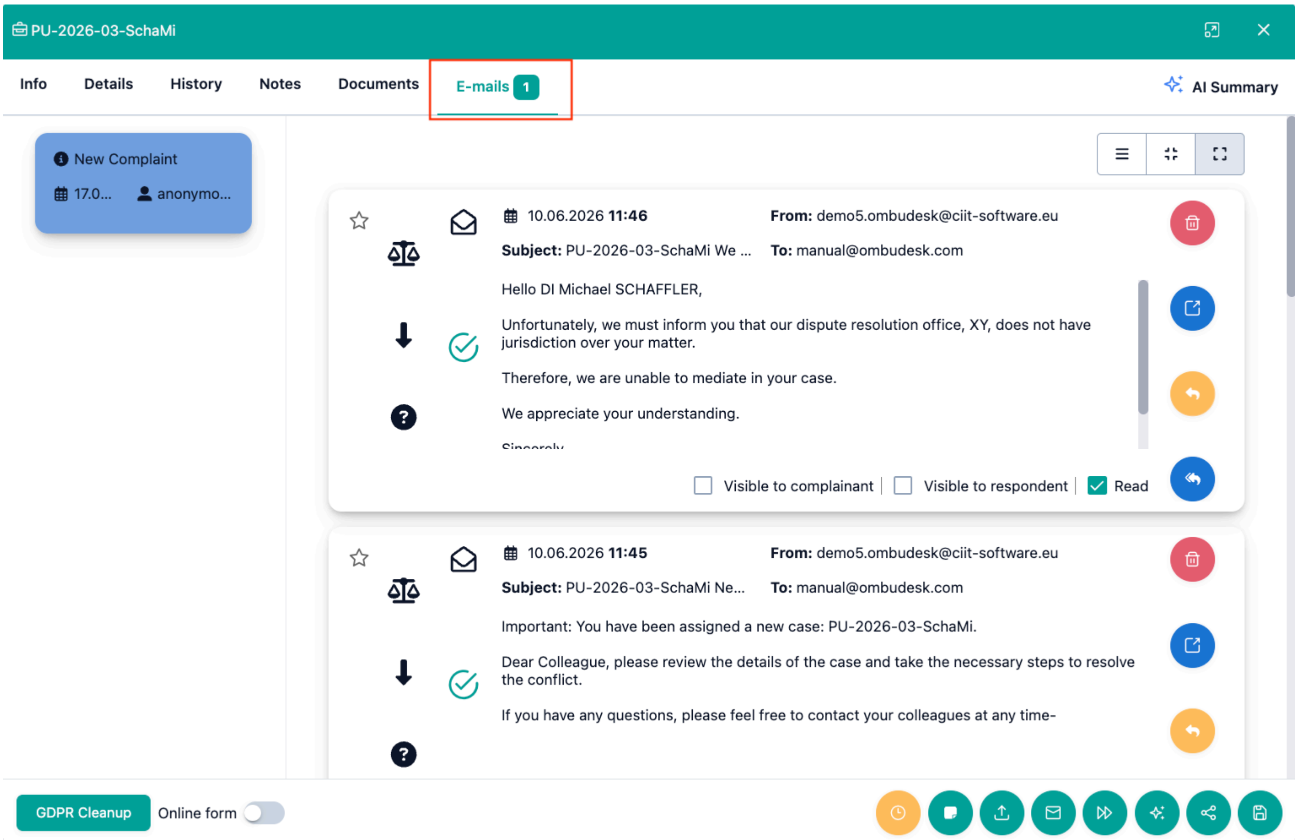
This symbol image represents the **expert**:

This symbol image represents an **unknown source**:

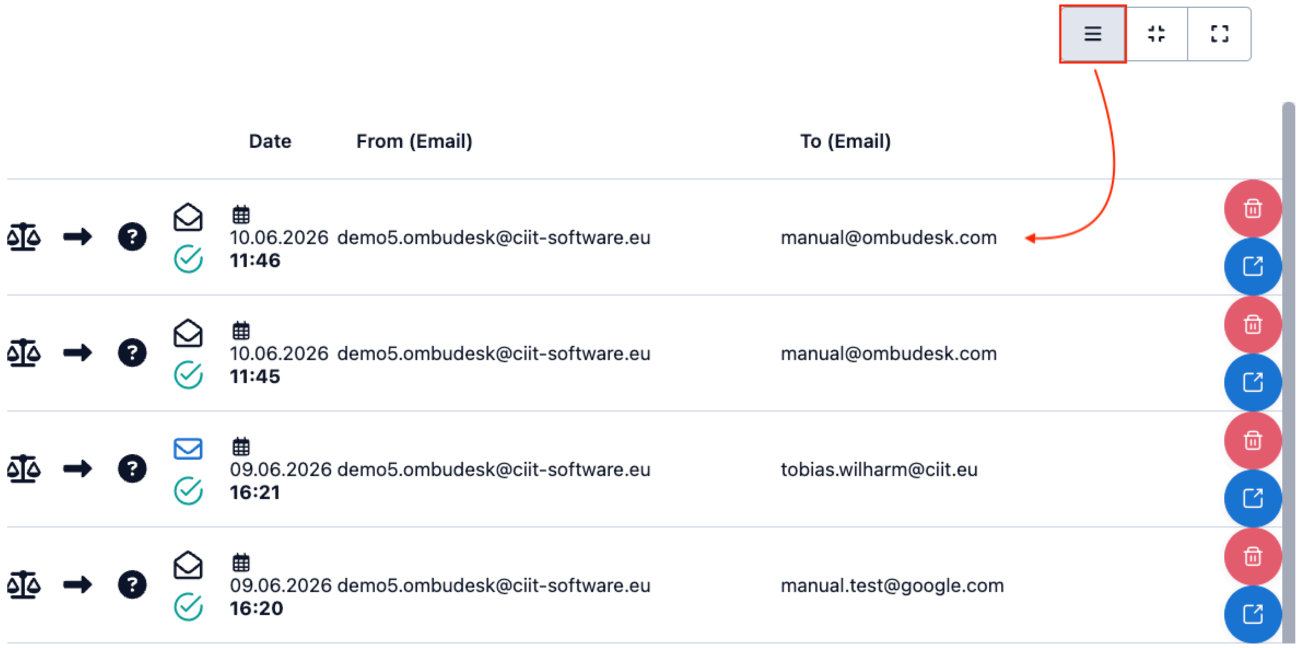
Messages

In the **Messages** tab, you will find **all** communication in one place.

OmbuDesk bundles all messages that you, complainants, and respondents have sent.



What information do you see at a glance in the email tab?



You can display the messages in three different sizes.

You will find the following information in every display size of your messages:

Data fields:

- **Date/Time**: Date and time are recorded for each message.
- **Sender/Recipient**: Sender and recipients are displayed by address.

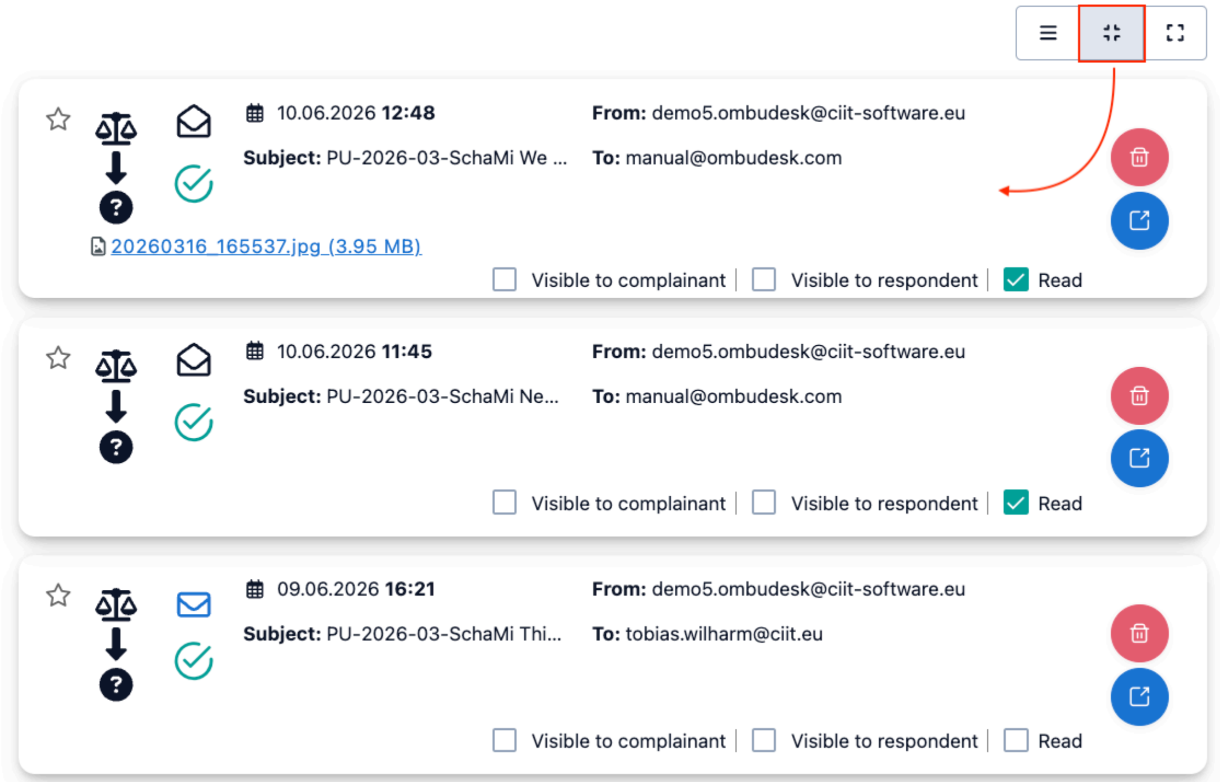
Symbol displays:

- **Favorite**: The star symbol shows whether you have marked a message as a favorite.
- **Communication direction**: The pictograms show you who was the sender and who was the recipient of a message.
- **Read/Unread**: The letter symbol shows whether you have read a message (open letter) or not yet read it (closed letter).
- **Sent/Draft**: The green checkmark means that the email was sent, and the orange pencil means it is a draft.

Available actions:

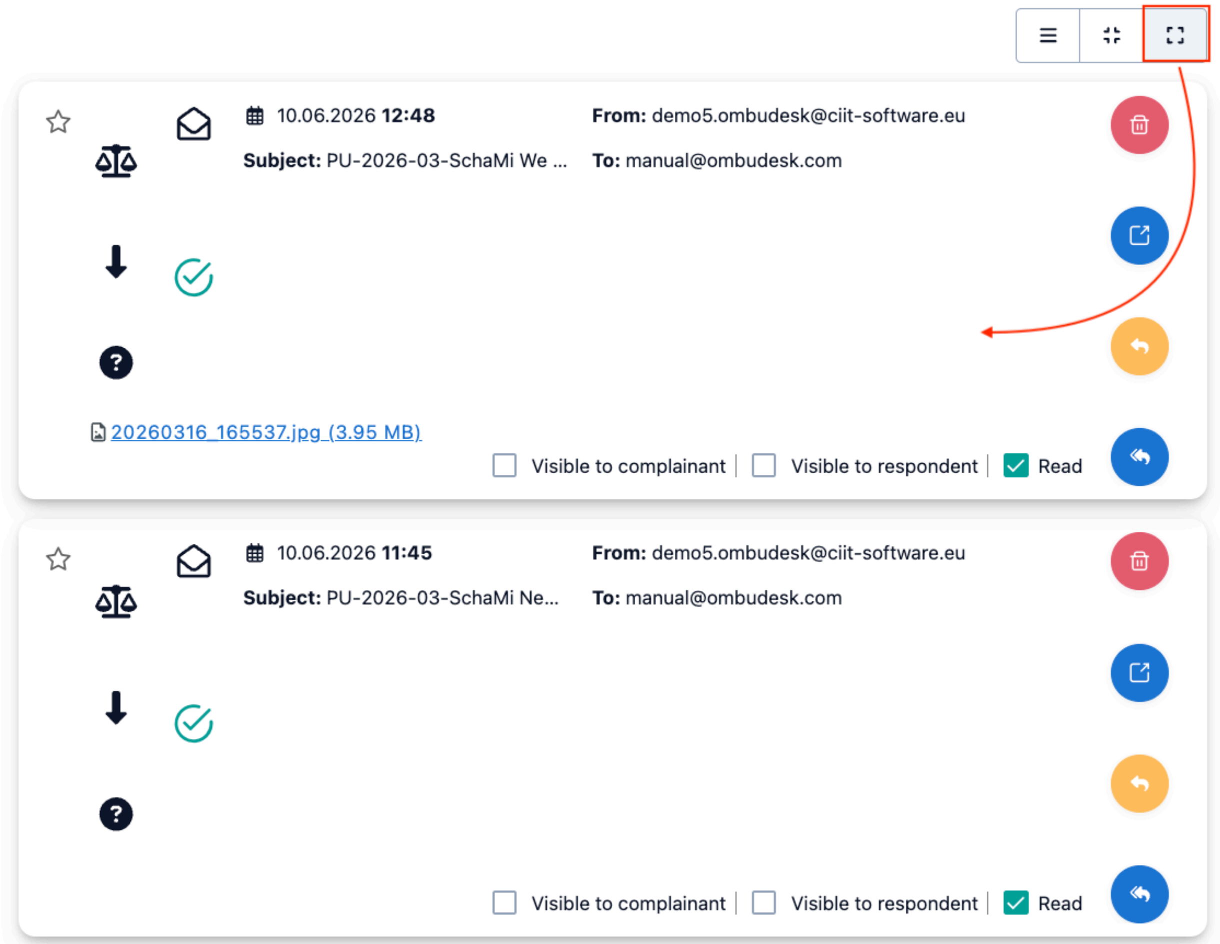
- **Delete/Open message**: Each card has the red "Delete" symbol and the blue "Open" symbol on the right edge.

The following fields are added if you choose the medium display size:



- **Subject:** The subject of messages.
- **Visibility:** You can change the visibility of a message for both parties with a click.
- **Read:** You can mark a message as read by clicking the checkbox.
- **Attachments:** You see attached files at the bottom left of each card.

If you choose the largest display size, you will also see the following elements:



- **Preview**: The content of each message is displayed directly in the card.
- **Reply**: You can reply to messages with the orange arrow on the right edge.
- **Reply all**: You can reply to all with the blue multiple arrows below it.

How are messages assigned to the correct case?

Each case has a **unique case number** that is generated during creation.

This unique case number is always correctly pre-filled when writing a message to a party. So when participants reply to you, OmbuDesk recognizes the correct case by the unique case number.

If you use the portal for your complainants and respondents, OmbuDesk automatically assigns messages sent through the portal to the correct case.

If a party emails you manually without specifying the unique case number, but the email address is already known, OmbuDesk assigns the message to the correct case.

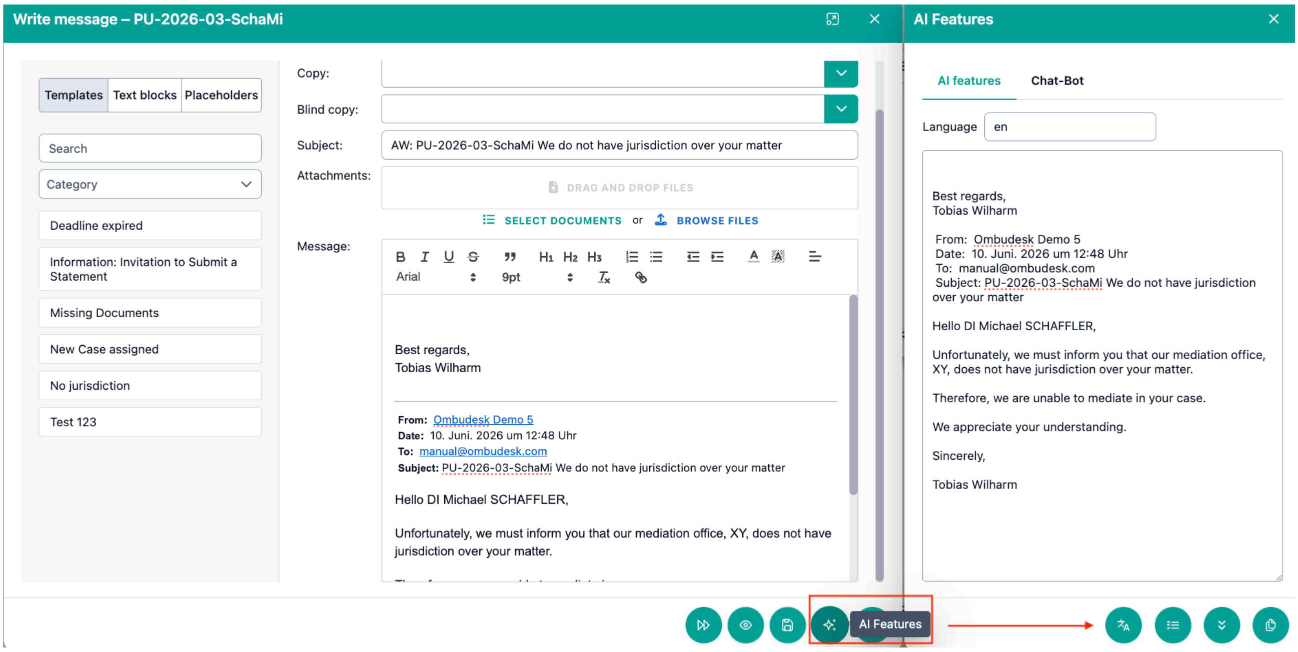
If a party sends an email without specifying the unique case number and the email address has several open cases, you will find the message under Unassigned Messages

AI Features

You have access to the AI Features at two different locations. They are always part of the **quick actions** at the bottom of every digital case file. They are also accessible at the bottom of the **"write message"** window.

OmbuDesk Chatbot

You see the OmbuDesk Chatbot as soon as you click on "AI Features".



How does the OmbuDesk chatbot support you?

The OmbuDesk chatbot is **familiar with the details of the respective case** and can answer your questions about it. You can therefore use the OmbuDesk chatbot as an **assistant**, for example, to determine the next required actions.

Depending on whether you have highlighted any text in the email before opening the AI features, you either will see the **entire text of the email (nothing highlighted)** or **only the highlighted text**.

AI Text Features

In addition to the OmbuDesk chatbot, there are three AI features that ease the communication with your parties:


AI Features
AI features
Chat-Bot
Language
en
Best regards,
Tobias Wilharm
From: Ombudesk Demo 5
Date: 10. Juni. 2026 um 12:48 Uhr
To: manual@ombudesk.com
Subject: PU-2026-03-SchaMi We do not have jurisdiction over your matter
Hello DI Michael SCHAFFLER,
Unfortunately, we must inform you that our mediation office, XY, does not have jurisdiction over your matter.
Therefore, we are unable to mediate in your case.
We appreciate your understanding.
Sincerely,
Tobias Wilharm
Translation
Correction
Simplification

1. **Translation**

The translation function allows you to translate the text in the window into all languages supported by your AI model. This grants you access to 70+ languages.

2. **Correction**

The correction function corrects all errors in the dialog window with one click. Thus avoiding any spelling mistakes.

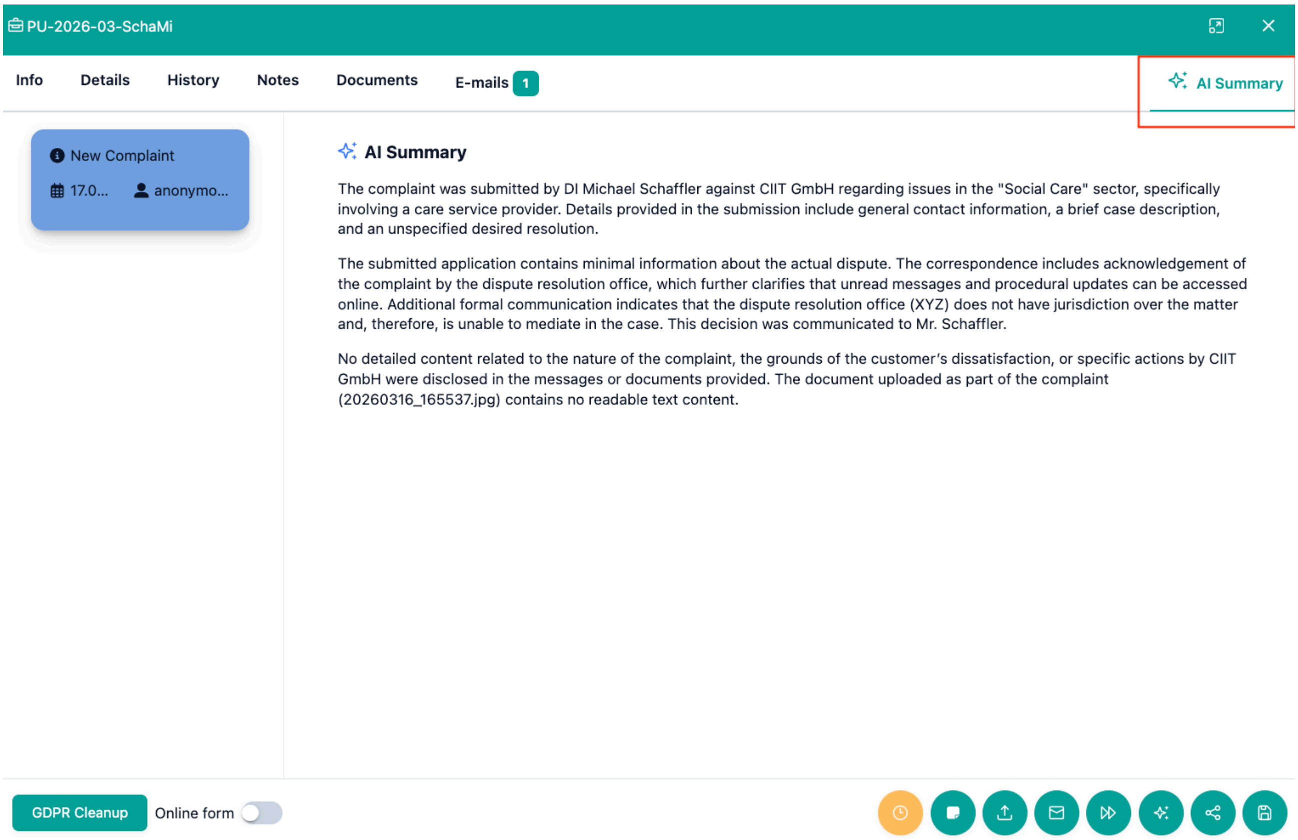
3. **Text Simplification**

Text simplification reduces the complexity of any given text. You can use this to easily understand wordy messages from any party. But it's also useful to dumb down your own communication.

Useful tip: Research has shown that the average reading level of an adult is hovering between the 7th and 8th grade.

AI Summary

The AI summary uses the application form, documents and the entire communication to provide you with a concise summary.



The AI summary provides you with a quick overview and current state of any case.

Which AI model creates your AI summaries?

Any AI model can be connected to OmbuDesk to generate AI summaries. In the test environment, OmbuDesk uses a version of ChatGPT hosted within Europe.

What advantages does an AI summary offer you?

If you work on many different cases every day, it is possible that you no longer know the context when a new development occurs in any given case.

With the AI summary, you can quickly & easily get an overview of every case.

This allows you to ...

... **save time**, because you don't have to look at the entire case history again.

... **continue unknown cases more easily**, because you immediately see the processing state of a colleague in the summary.

... **focus on the essentials**, because you don't have to waste energy reviewing documents, emails, etc.

What is the problem if there is no AI summary yet?

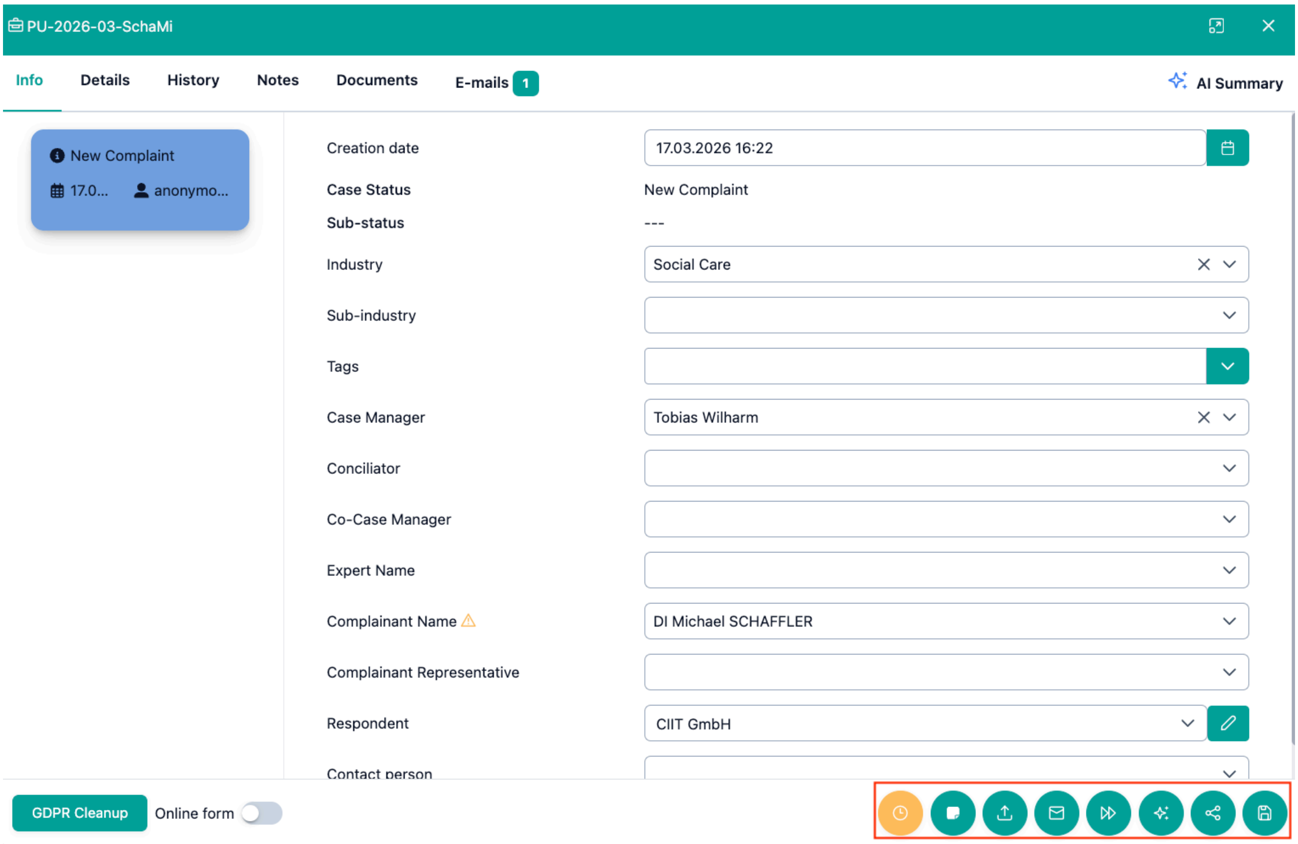
If you don't see an AI summary for a case yet, the case is too recent for a generated summary. It usually takes half an hour for the summary to appear.

Is the AI summary always up to date?

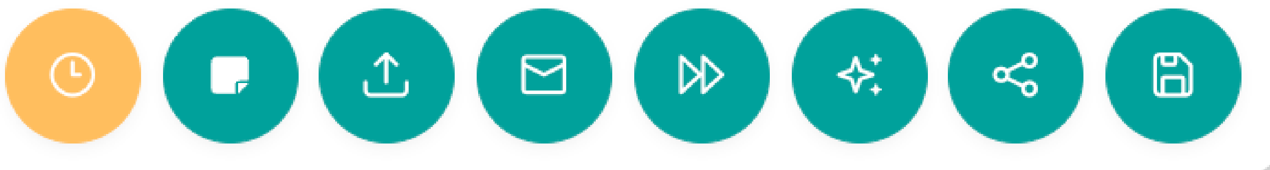
Yes, the AI summary is updated with every change. So if a new development happens in a case (a new message was received, documents were uploaded, etc.), the AI summary will reflect the changes within half an hour.

Quick Actions

The quick actions in the digital case file enable smooth processing of cases. You will find the quick actions in the bottom bar of the digital case file.



Which quick actions are available to you in the digital case file?



You can use the following quick actions in the digital case file (from left to right):

1. **Set deadline**: Set a deadline for a specific date.
2. **Add note**: Add a note to a case.
3. **Upload document**: Add a new document to a case.
4. **Write message**: Send a message to your parties.
5. **Change status**: Change the status of a case.
6. **AI functions**: Use the AI functions of OmbuDesk.

7. **Similarity search**: Find a similar cases in your database.
8. **Save**: Save all changes to a case.

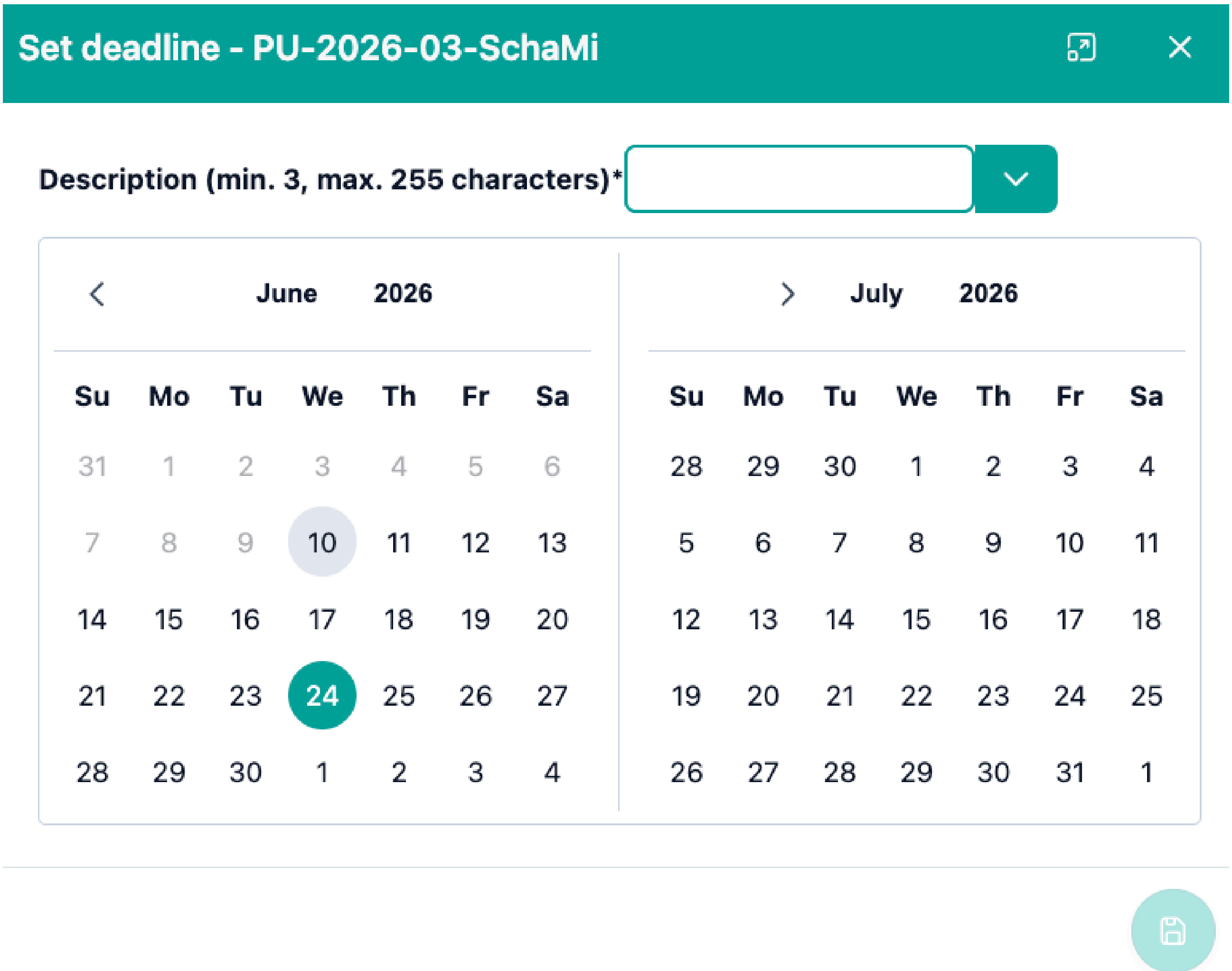
How do you increase your efficiency in case processing with quick actions?

The individual quick actions are either linked to other functionalities or make your work easier as a standalone function.

You will find the detailed description of each quick action below:

Set deadline

You can set a new deadline with this quick action and **assign a name** as well as select the **due date**.

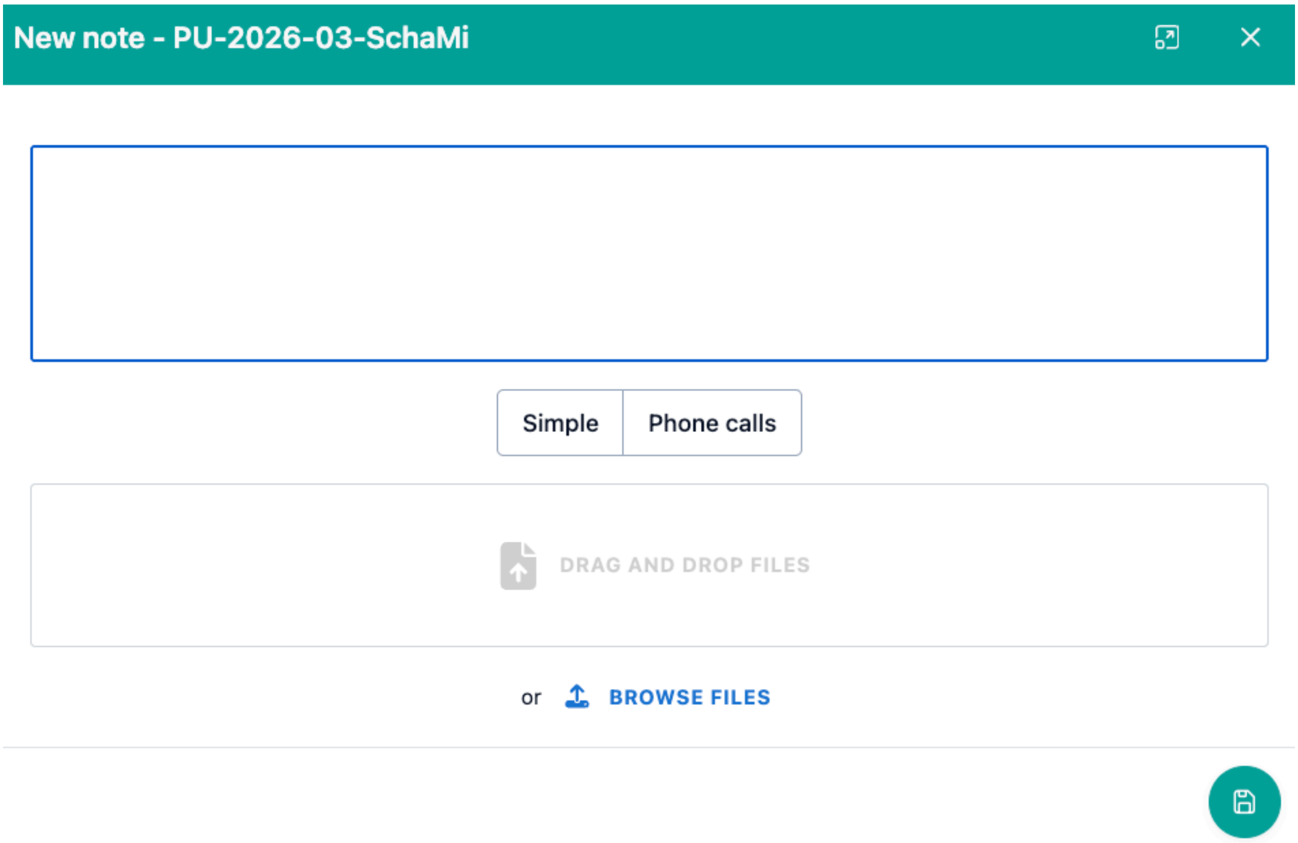


All deadlines appear in the history of the digital case file, in the Deadlines tab, and if the deadline expired, also in the Expired Deadlines tab.

This connectivity allows you to **keep an overview** of all your deadlines – pending, expired, single, multiple – **simply all of them**.

Add note

You can add notes to all cases. All notes are only **visible to employees of your dispute resolution office**. If you select the quick action a free text field opens where you can enter information.

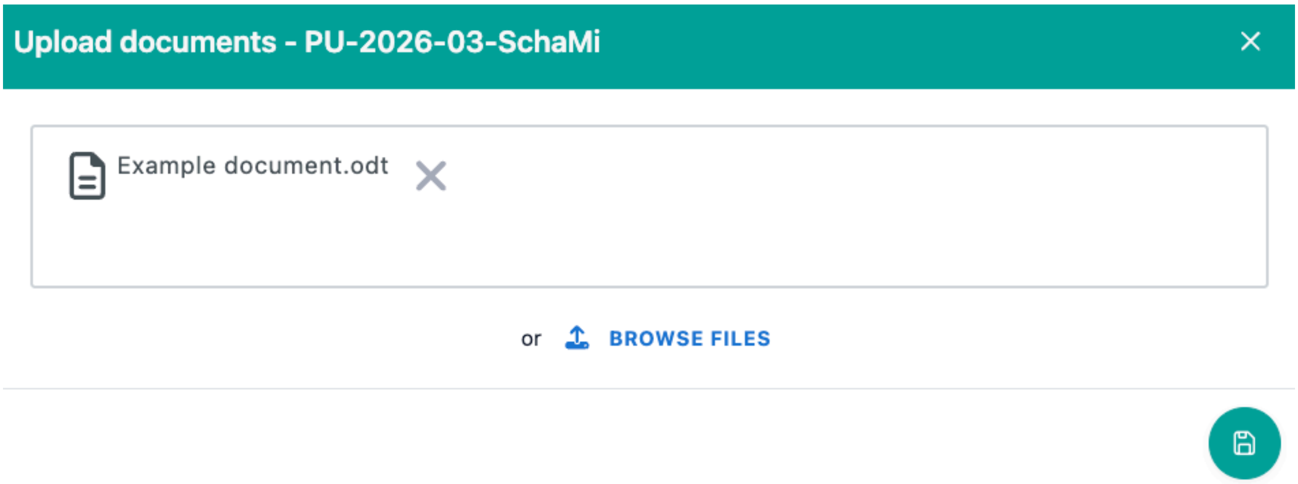


The new note can then also be viewed in the History or Note tab of the individual digital case file.

This way, you can easily share information with your colleagues. Time and creator also get tracked.

Upload document

You can use this quick action to easily add documents to digital case files. You can simply drag documents in or search your files for the correct document.

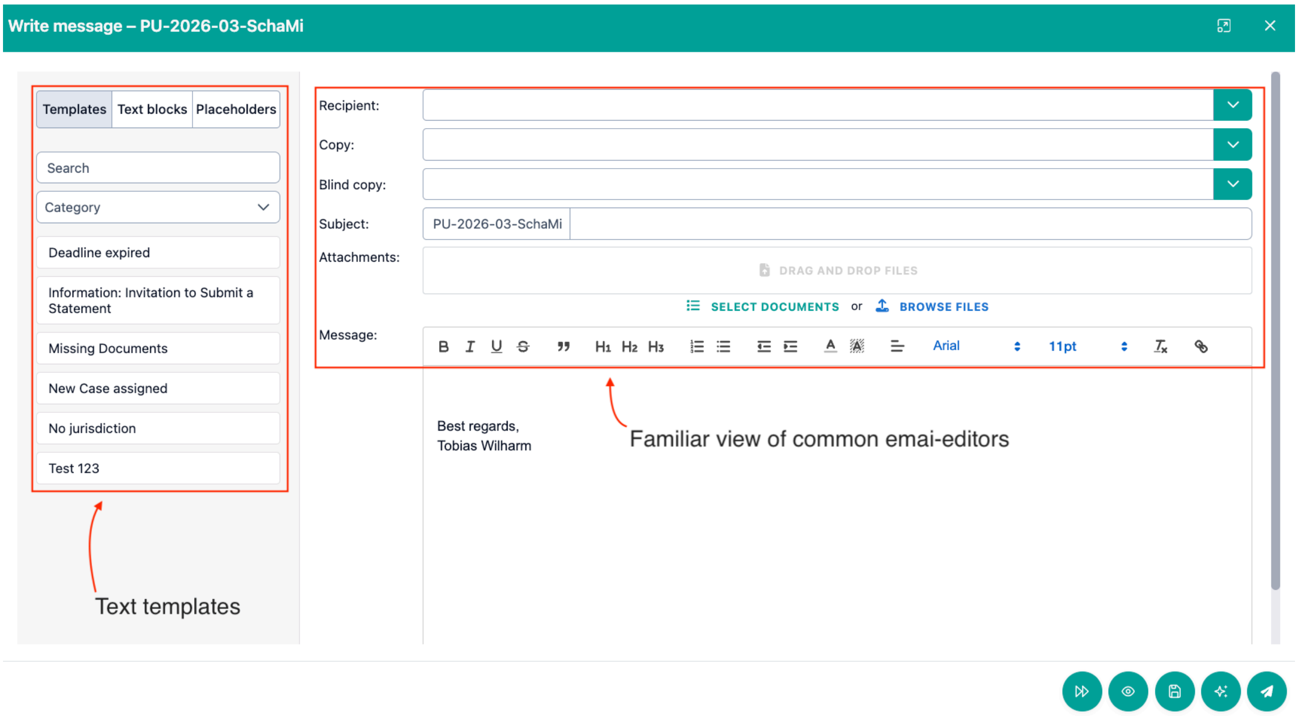


All documents uploaded this way can be found both in the Documents tab and for quick selection when writing messages.

Write message

When you write a message, you can use all predefined email templates and text blocks, the editing of which is described in more detail in the settings.

Additionally, the dialog window for writing messages resembles common email programs that you are already used to:



Which functionalities are available to you when writing messages?

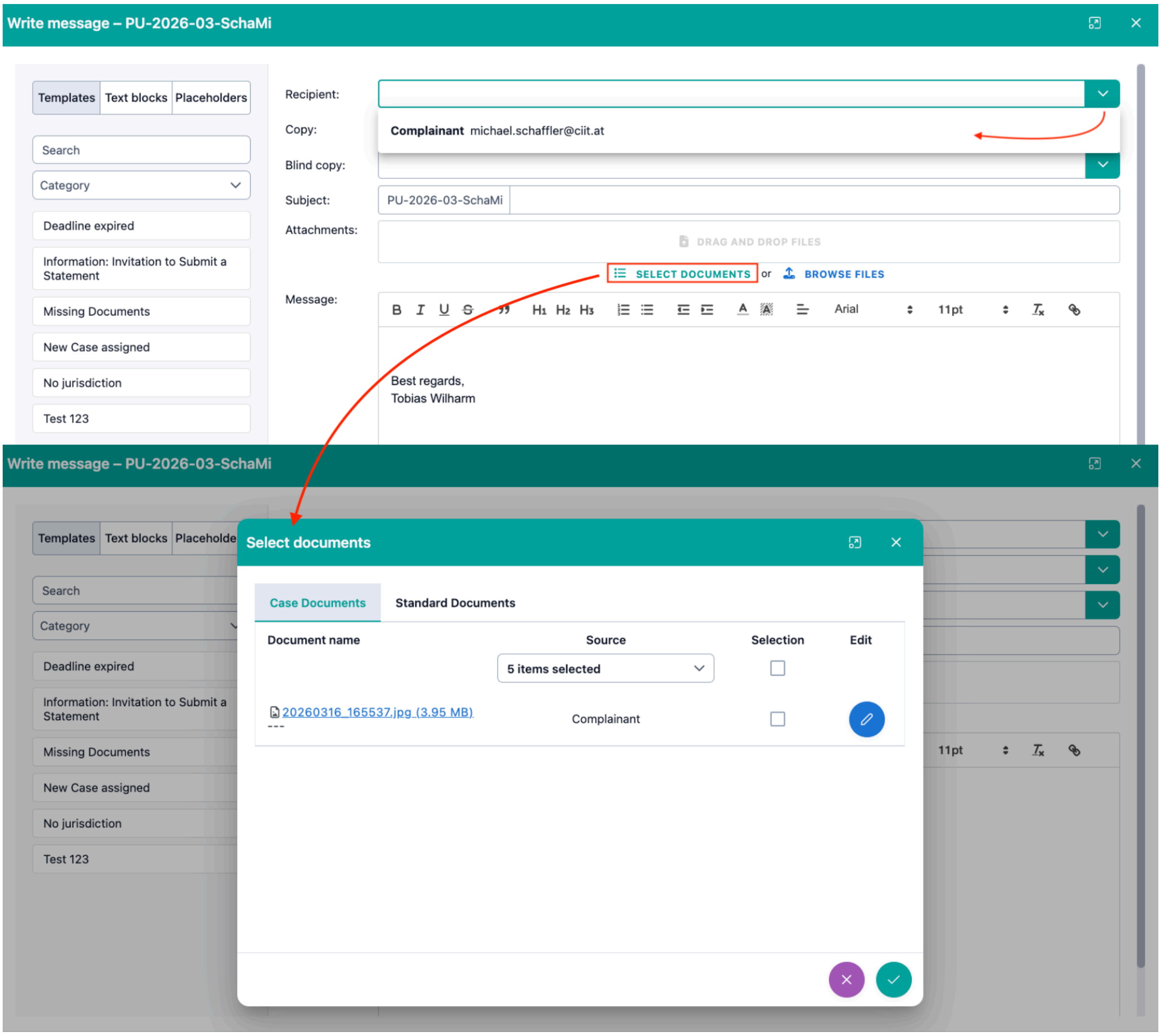
Writing messages is the central communication tool in OmbuDesk. This function is also linked to other functionalities in many places.

In addition to email templates, text blocks, and placeholders, there are a number of other functions that support you in your communication:

1. **Automated pre-selection of recipients and documents**

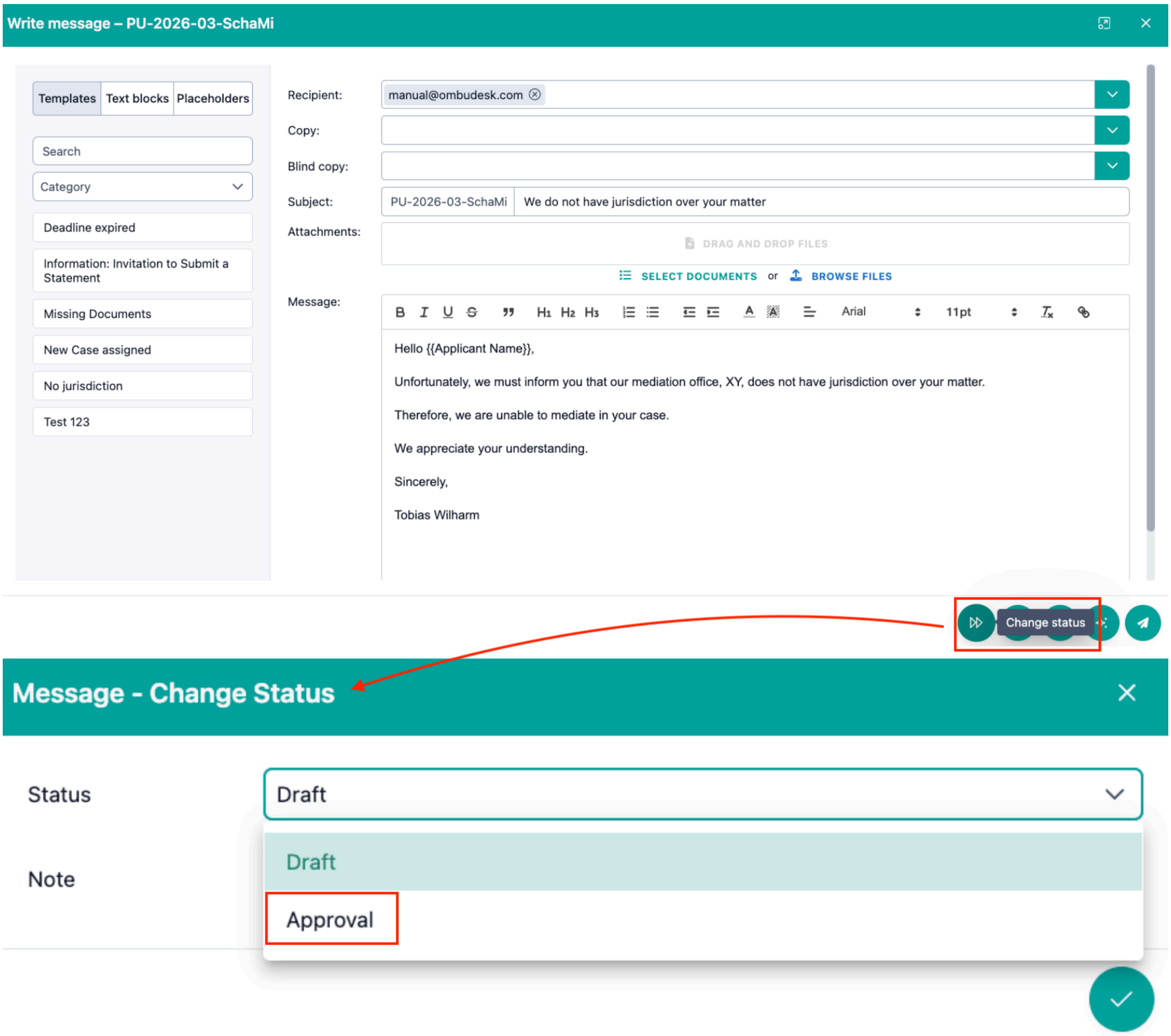
When you want to fill in the recipients of a message, OmbuDesk automatically offers you stored email addresses for the specific case.

Similarly, under "Select documents", you will find all documents that have already been assigned to this digital case file.



2. **Drafts and approvals as status changes**

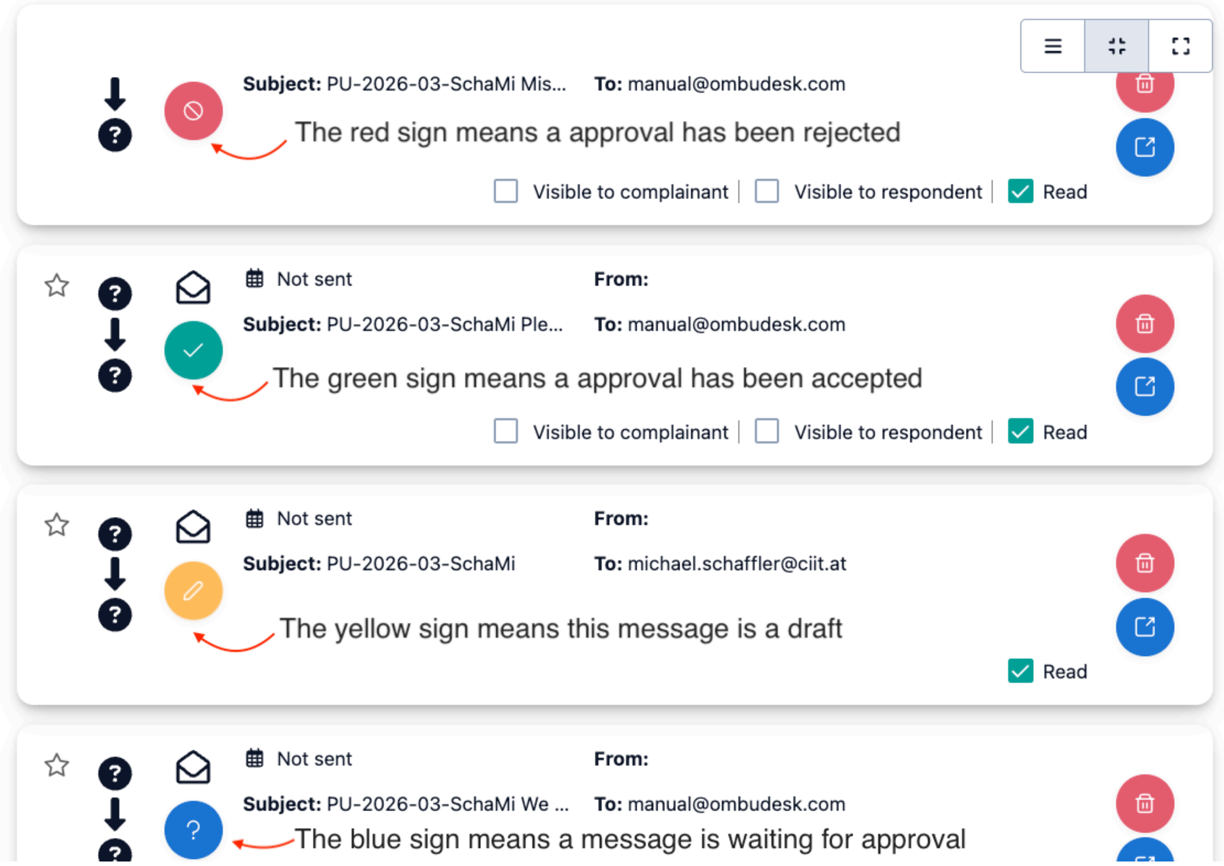
When writing a message, you can select the "Status change" action at the bottom right.



If you **save a message as a draft**, you will then find the message in the "Messages" tab of the file.

If you **set a message to approval**, it appears for the authorized persons under approvals and appears in the "Email" tab.

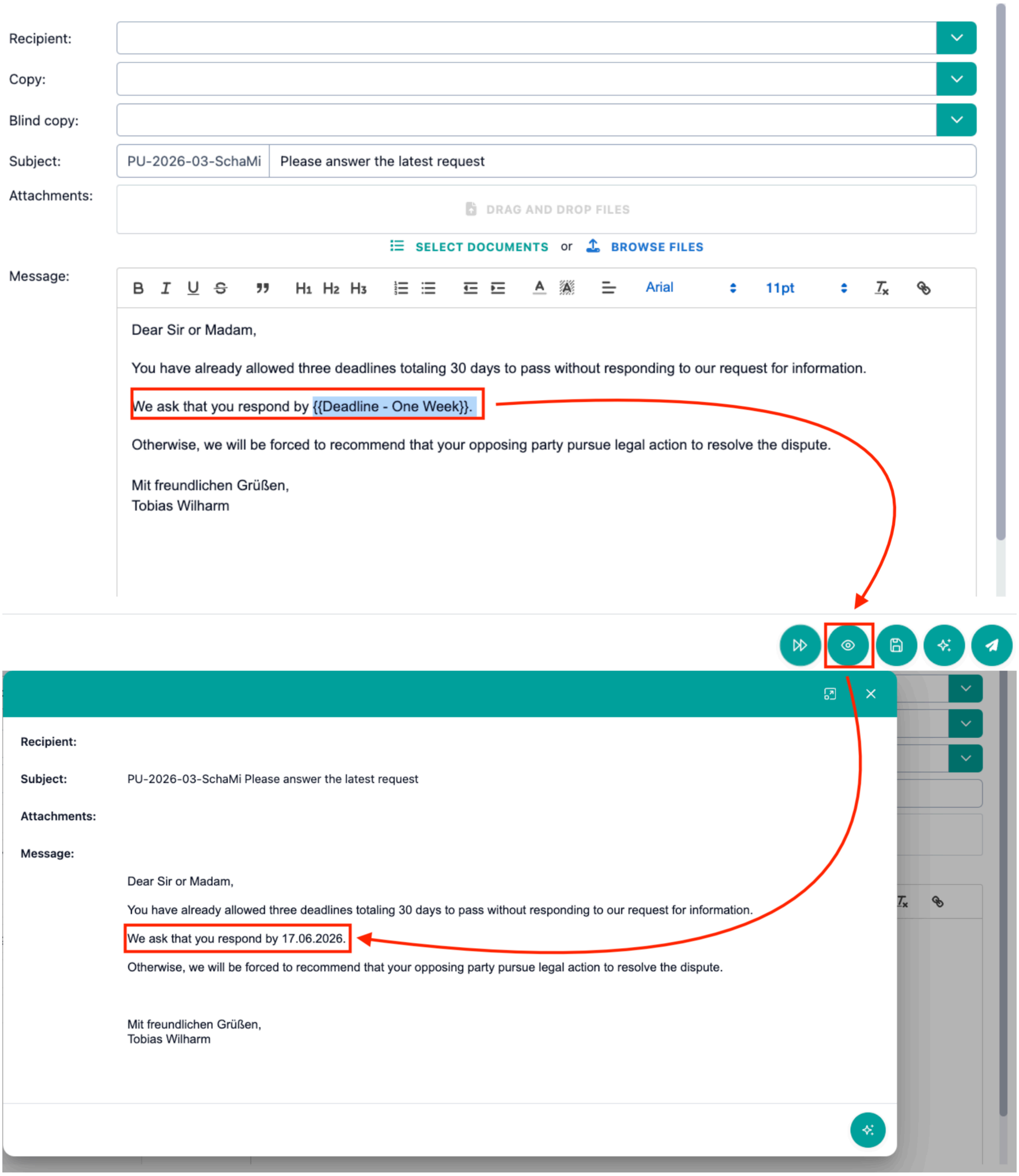
You can find out more about approvals in the dedicated section on Approvals.



3. **Show email draft**

If you use text blocks or placeholders in your emails, these are not directly replaced in the email editor for a better overview.

You can see how an email will look like to your recipients by clicking the **Preview (eye symbol)**.



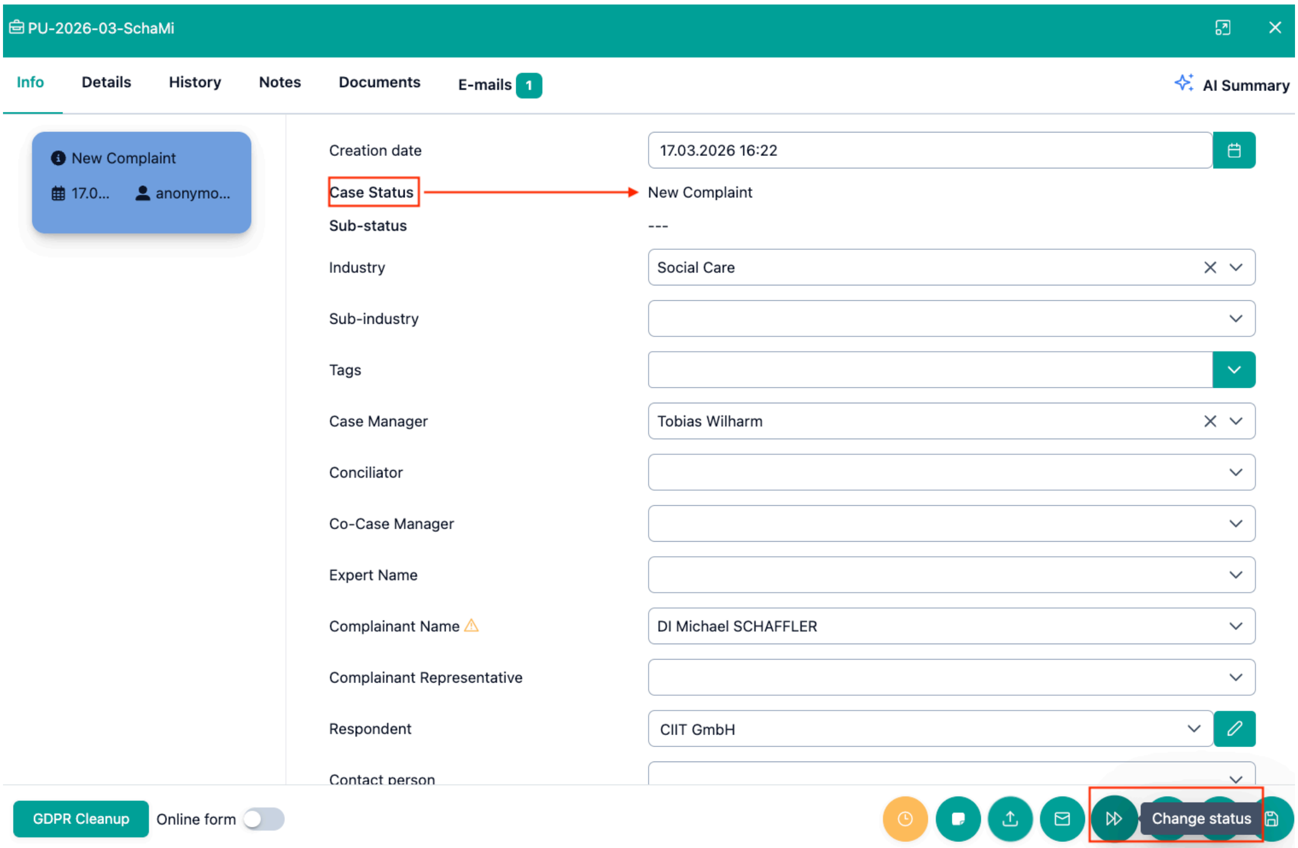
4. **AI functions**

When you write a message, you also have access to the AI features of OmbuDesk.

You can either ask the OmbuDesk Chatbot for any details about the case or **translate, correct, or simplify text.**

If you want to learn more about the AI features, then click here on AI Features.

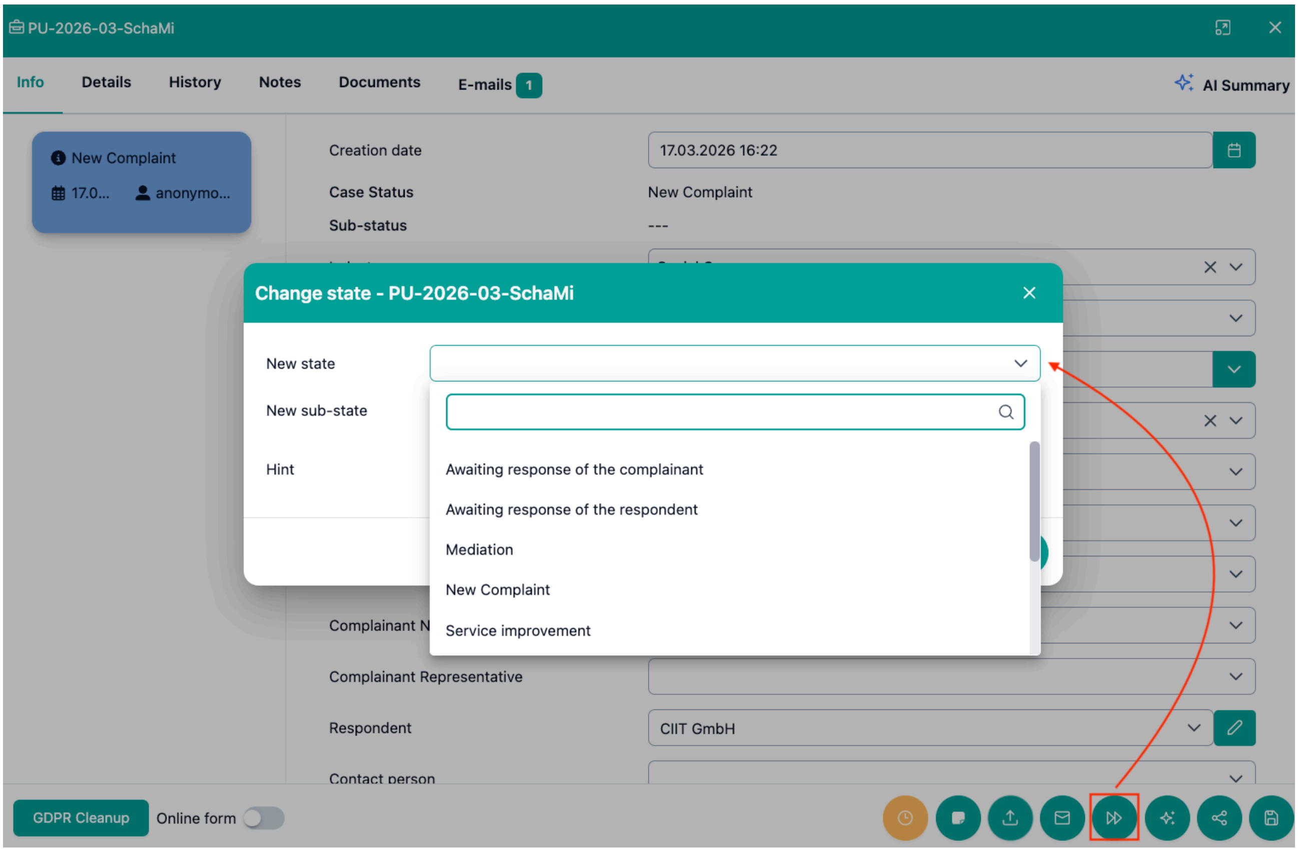
Status Change



The most important quick action, to reflect the work on a case along your own processes, is the status change.

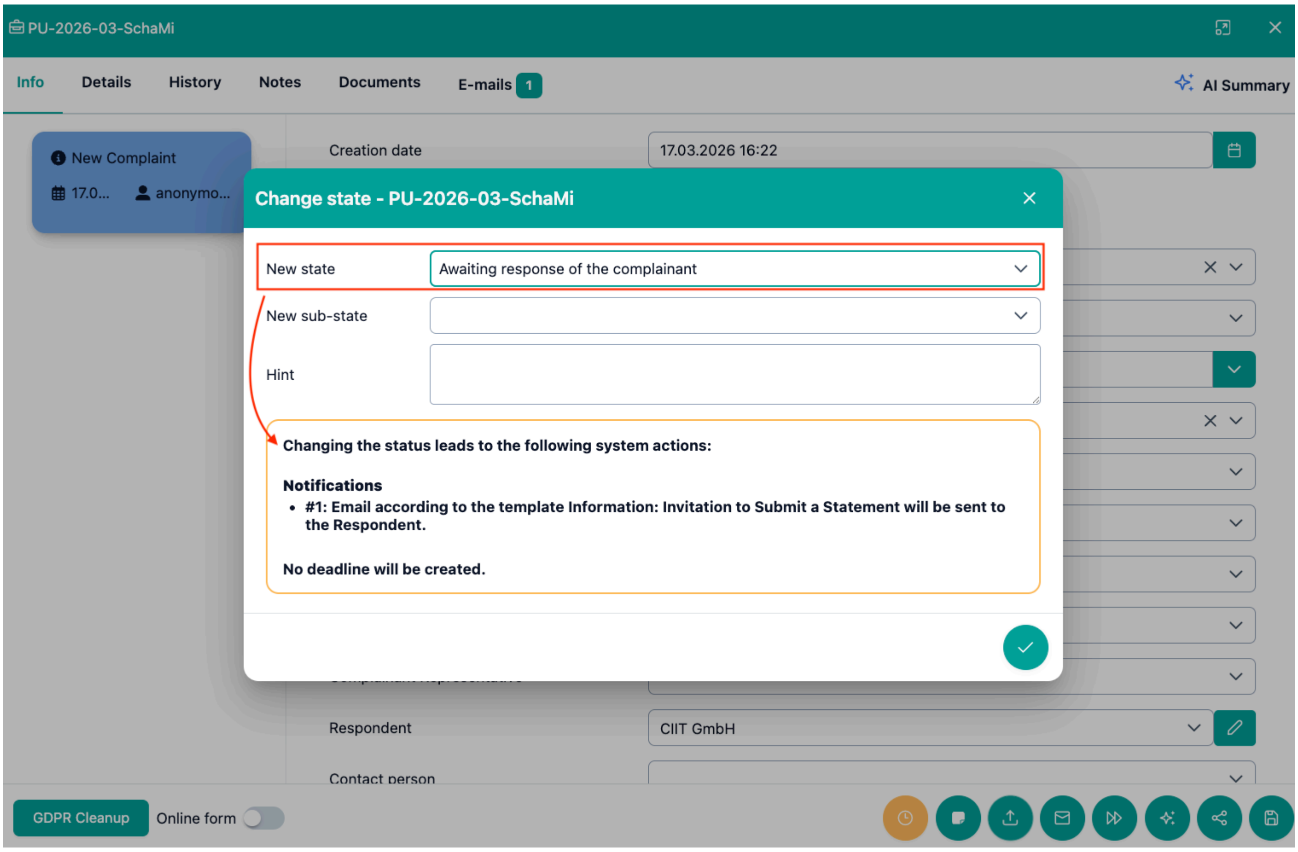
In the settings area for case status, you will find the explanation of how to adapt the various statuses to your preferences.

When you select the quick action, a **dialog window** opens that offers a selection list of all available statuses:



You can **link each status change to automations** regarding **email dispatch** and **deadline setting.**

When changing a status, you will then receive a **notice** of which linked actions OmbuDesk is performing for you in the background:



Similarity Search

The similarity search is also stored as a quick action in every digital case file.

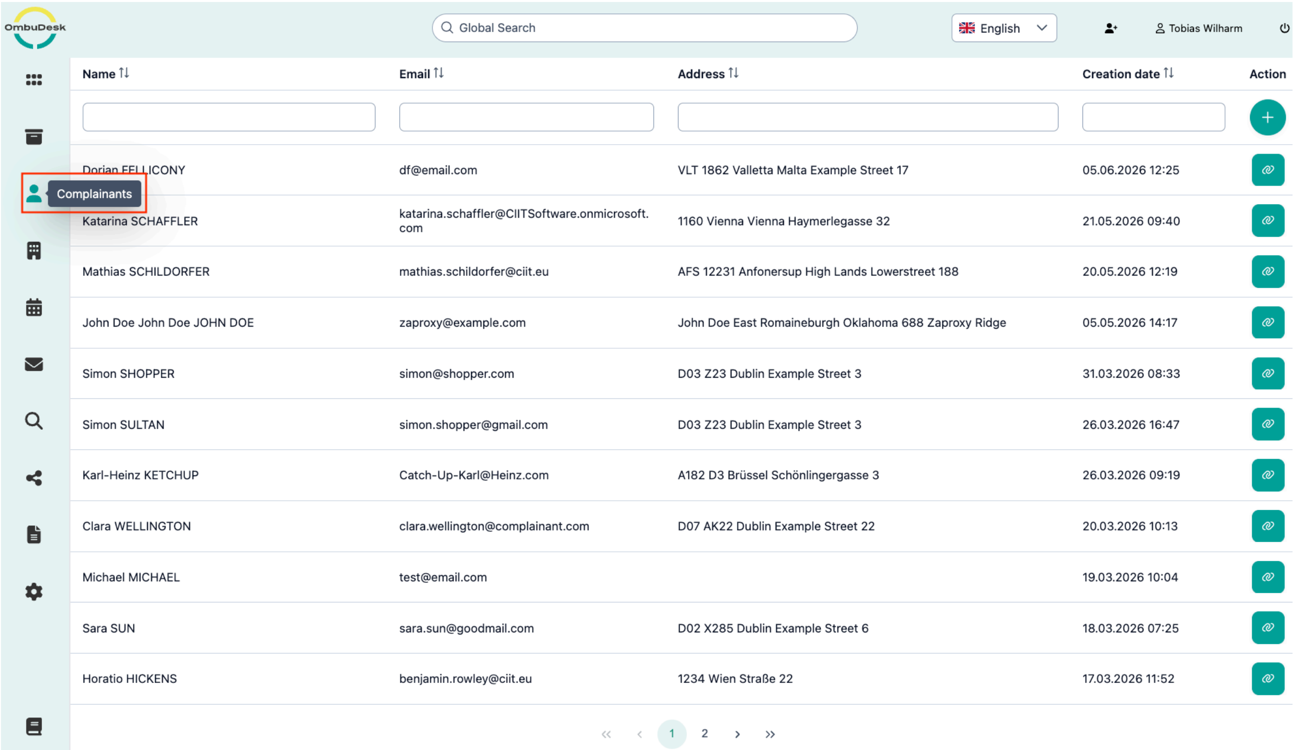
The similarity search supports you in finding similar cases to the one you are currently working on. This way you have access to already proven solutions at any time.

You can find more information on how to use the similarity search in the manual under "Search" or by clicking on the word "Similarity Search" above.

Complainants & Respondents

You will find both the **"Complainants" directory** and the **"Respondents" directory** in the left navigation bar.

Both directories work the same way, which is why the manual only explains the Complainants directory. All descriptions are also applicable to the Respondents directory.



What purpose does the Complainants directory fulfil?

You can see all complainants and their data. Here you will find the data which was submitted through the application form. The directory makes it easier to both **search through** your complainants and **edit** the associated data.

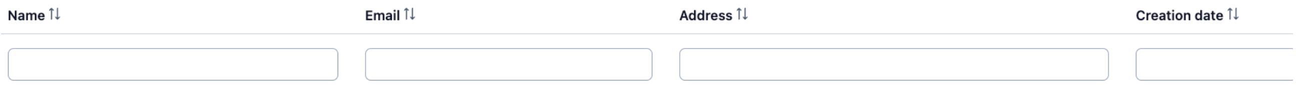
How is the Complainants directory structured?

The following information about your complainants is displayed in tabular form:

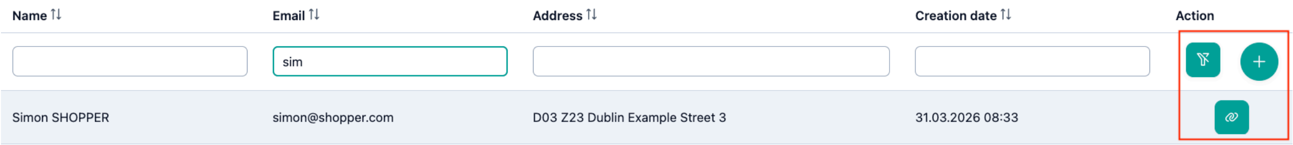
- **Name**: First and last name of the complainant.
- **Email**: The stored email address for contact.
- **Address**: Residence data of the complainant.
- **Creation date**: Date & time of the first application of a complainant.

Which search and filter functions can you use in the directory?

Above each information column, you will find fields that you can use for searching and filtering. **Free text fields** are name, email, and address; the date is a **calendar** to select the desired time period.

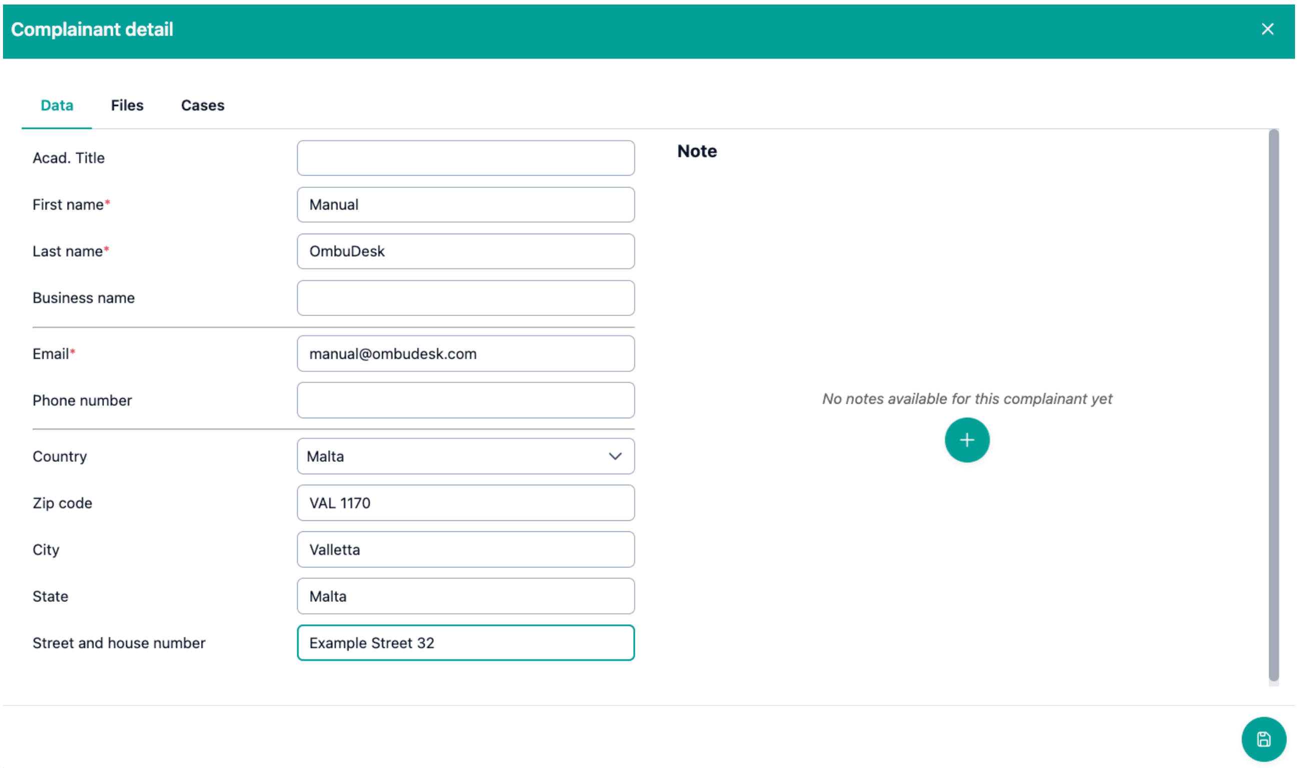


Which actions are available to you in the directory?



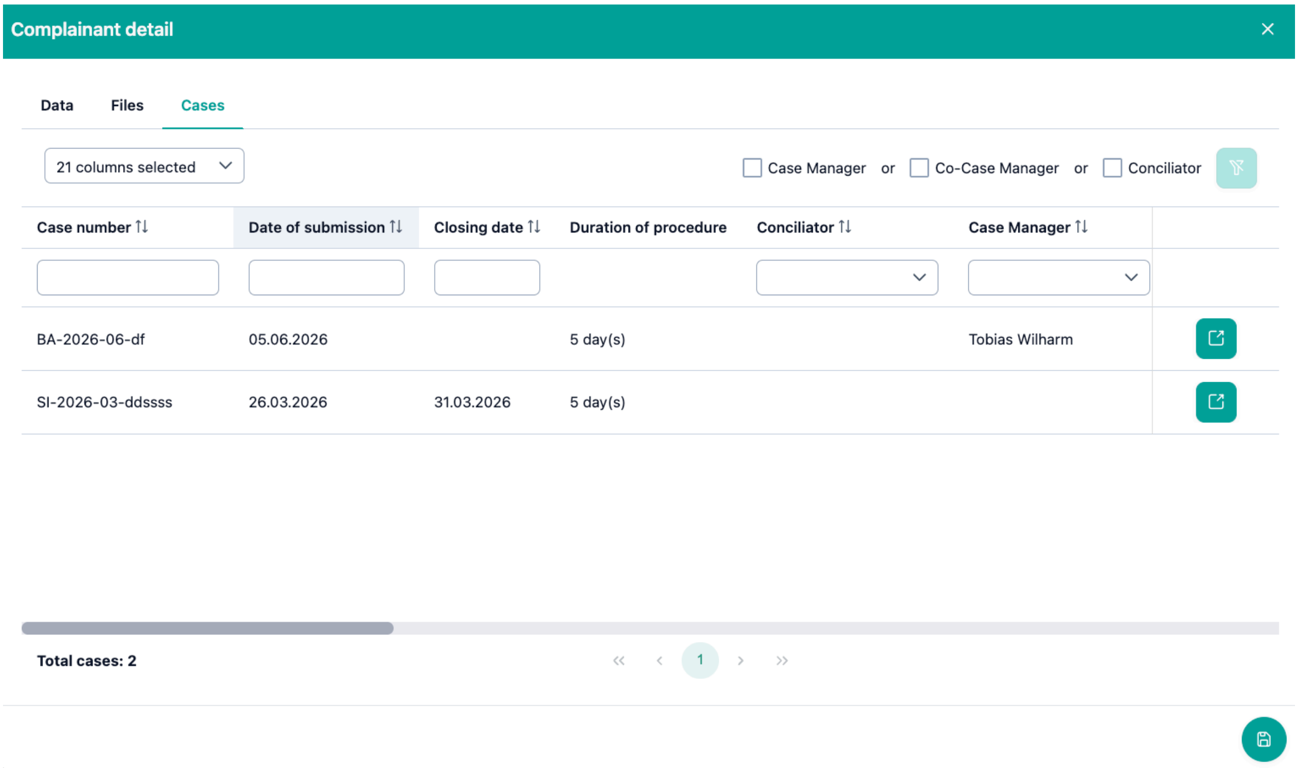
The following actions can be found on the right edge of the complainant directory:

- **Add new complainant**: The green plus symbol allows you to manually create new complainants – e.g., for telephone inquiries – when you push the button, a **dialog box** opens:



- **Open linked information**: Via the green paperclip symbol, you open the linked data record for a complainant. You see the same view as in the previous image, but with the stored data.

  For example, if you want to see all linked complaints for a complainant, simply navigate to "Files":



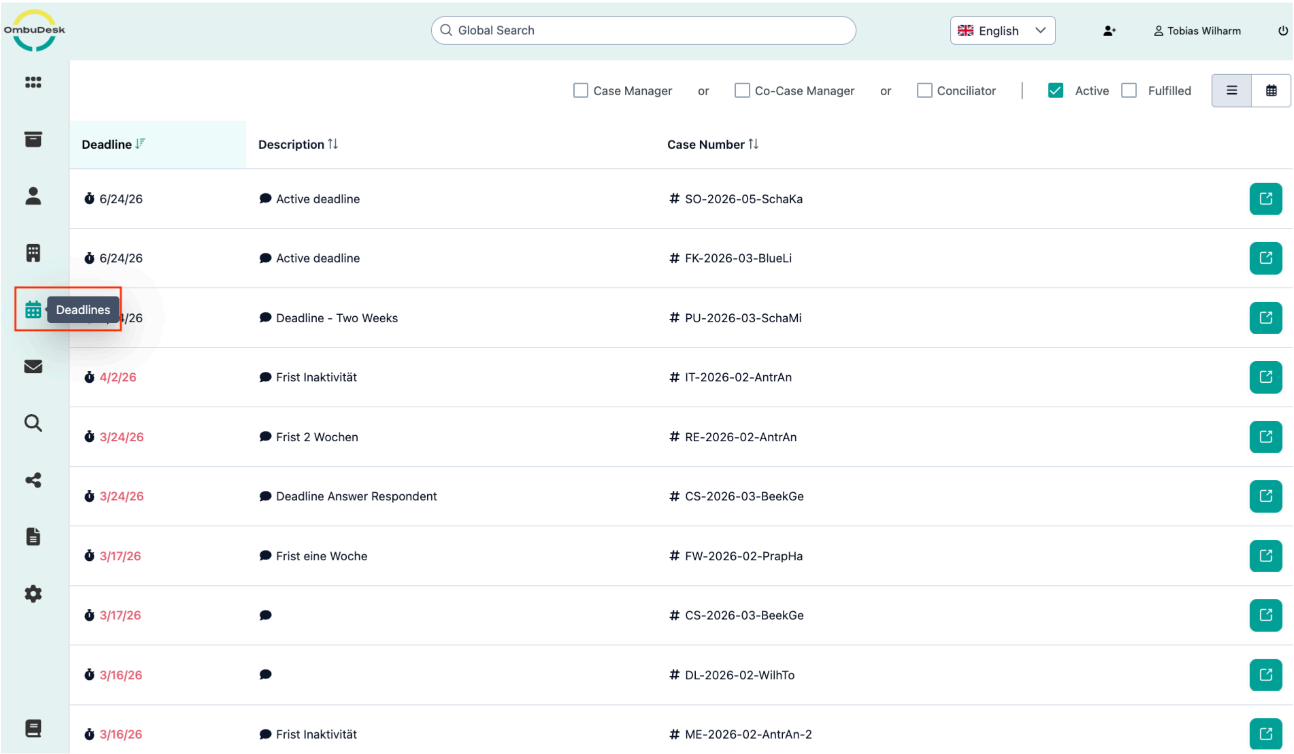
- **Reset filters:** If you have activated filter and search functions, you can deactivate all filter conditions again via the green funnel symbol.

How can you make changes to the data?

If you navigate to the **data view** of a complainant, you can easily change all master data. The changes are applied to **all** open cases to which the person is assigned.

Deadlines

You can find all **Deadlines** in your entire data set by taking a look at the Deadlines directory.



What is the purpose of the deadline directory?

The deadline tab in the left navigation bar is a **collection of all deadlines** that exist in your digital case files.

The view helps you to quickly get an overview of all deadlines in ongoing and past cases.

What information do you see in the deadline view?

All deadlines within your cases are listed in tabular form and displayed with the following information:

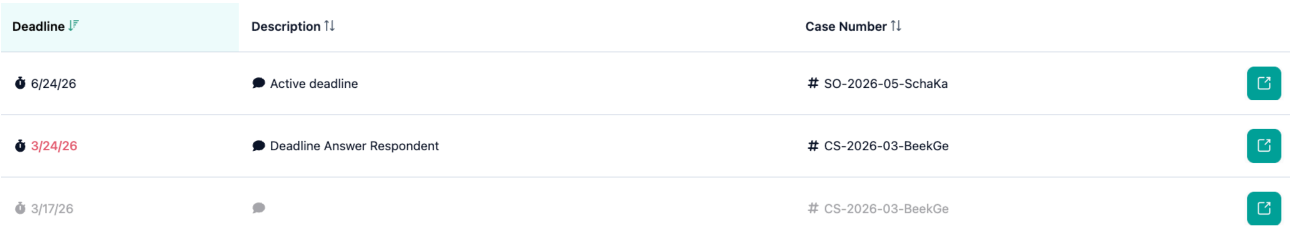
- **Due date**: The due date shows you the exact date on which a deadline expires.
- **Description**: The description shows the content of the free text field "Description" that you can fill in when creating a deadline.

- **Case number**: The case number shows you the unique case number of every case.

How can you easily differentiate the status of deadlines?

Each deadline is colored differently depending on its status. The following colors are possible:

- **Black** is used for ongoing deadlines that are neither fulfilled nor expired.
- **Grey** is used for deadlines that have already been fulfilled.
- **Red** is used for deadlines that have expired and signal a need for action.



Deadline	Description	Case Number	
6/24/26	Active deadline	SO-2026-05-SchaKa	
3/24/26	Deadline Answer Respondent	CS-2026-03-BeekGe	
3/17/26		CS-2026-03-BeekGe	

What filter functions are available to you in the deadline view?

You can filter the deadline view by **"Case manager"**, **"Co-case manager"**, and **"Conciliator"** for cases in which you take on one of the roles.

Additionally, you can show and hide active or fulfilled deadlines using **"Active"** and **"Fulfilled"**.

On the right edge, you also have the option to switch between a **list view** and a **calendar view**.

How do you open the case view for a shown deadline?

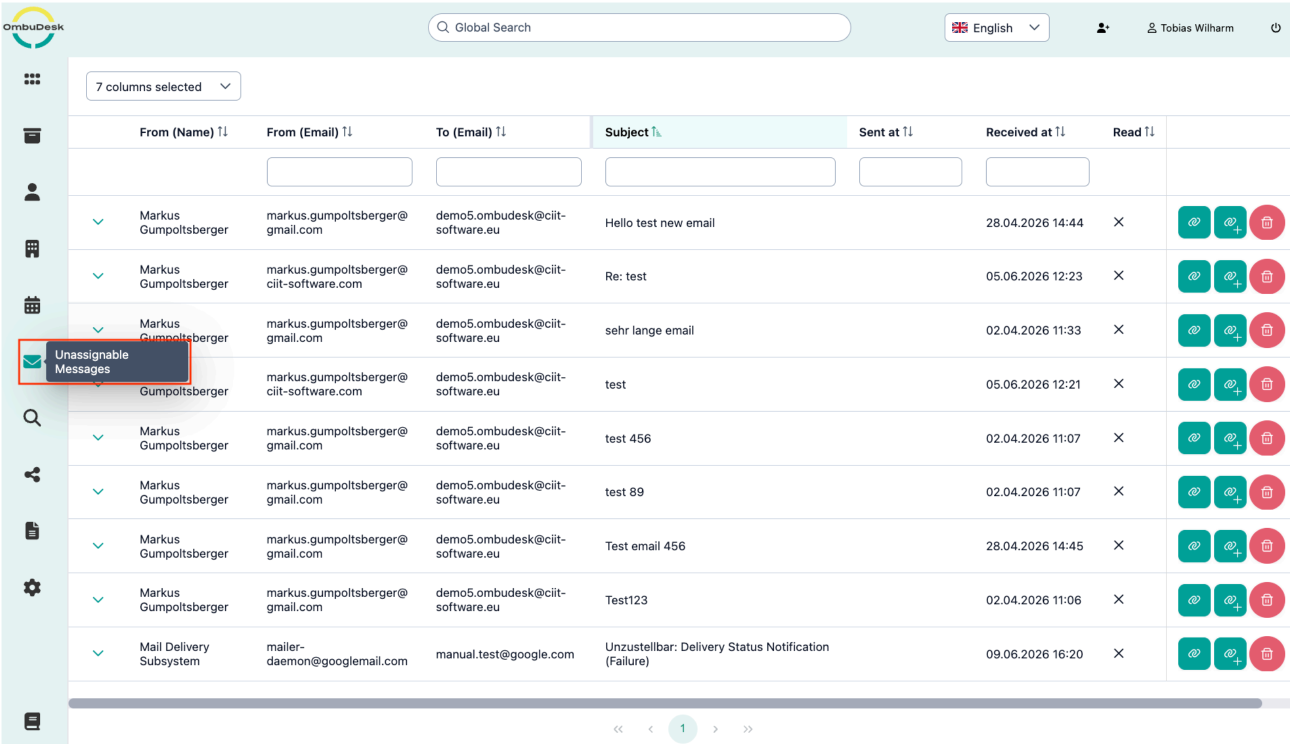
The directory of deadlines enables you to easily open connected cases via the blue arrow on the right side:

Deadline	Description	Case Number	
6/24/26	Active deadline	# SO-2026-05-SchaKa	
3/24/26	Deadline Answer Respondent	# CS-2026-03-BeekGe	
3/17/26		# CS-2026-03-BeekGe	

When you push the button, the connected digital case file opens up in the history tab. There you can check the deadline and mark it as fulfilled if necessary.

Unassignable Messages

You can find all incoming **messages or emails** in this view that OmbuDesk could not automatically assign to a case.



How does the automatic assignment of OmbuDesk work?

When your complainants submit a new case, it receives a unique case number, e.g., 123-XY-DE.

As soon as a new message arrives with a unique case number, OmbuDesk assigns the message to the corresponding case.

This applies to messages from your complainants as well as respondents, and other parties such as experts.

In which cases does the automatic assignment not work?

The automatic assignment of messages is very reliable but may not work under the following circumstances:

1. A message is sent to you **without a unique case number AND** the sender is involved in **more than one open case**.

2. An email is sent to your dispute resolution offices' email, but the sender is not yet **known**.

3. A message **contains more than one unique case number** and therefore the automatic assignment does not work.

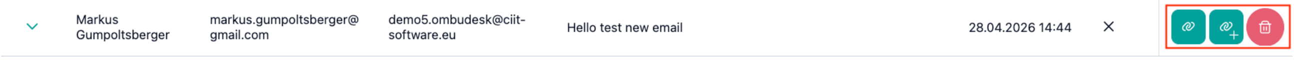
When does a message appear under "unassignable message"?

A new message is displayed under **unassignable messages** if one of the **three scenarios** is met, which is why a message cannot be assigned automatically.

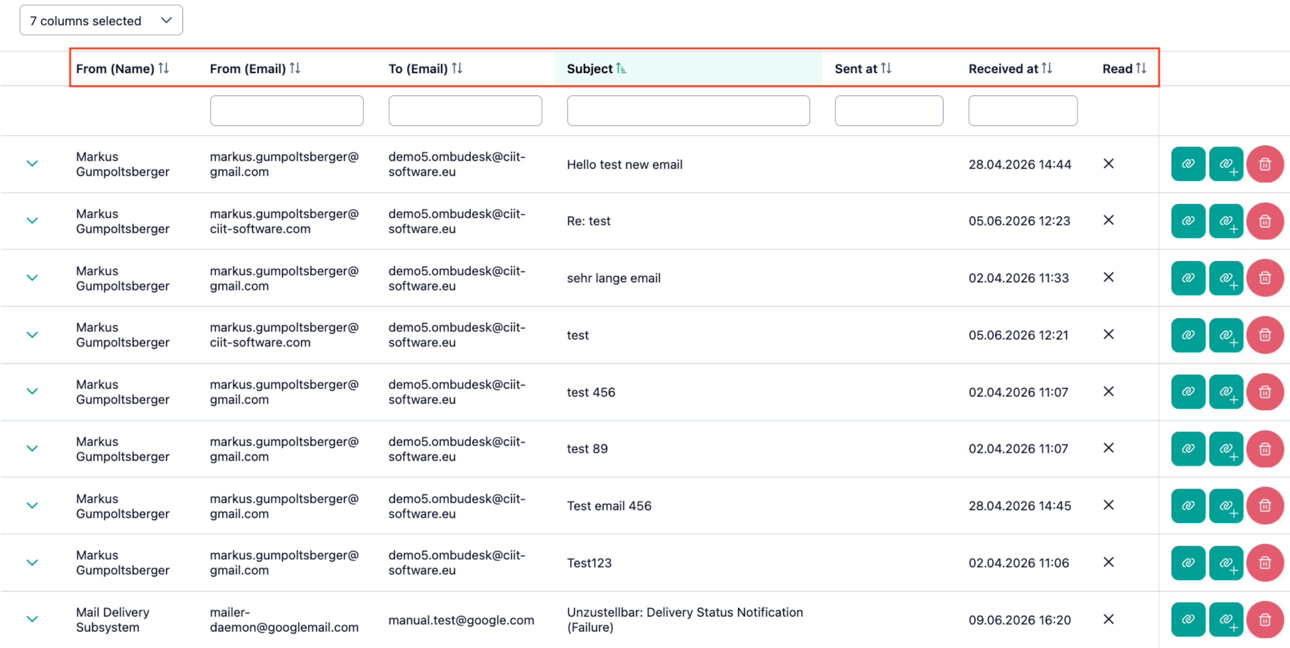
What options do you have to process an unassignable message?

When you receive an unassigned message, you can either:

1. **Link the message with an existing case** if you know which active case it belongs to.
   - The symbol for this is the blue paperclip symbol.
2. **Create a new case from the message** if the sender is not yet known.
   - The symbol for this is the blue paperclip symbol with the plus symbol.
3. **Delete the message** if it does not contain relevant information for your dispute resolution office.
   - The symbol for this is the red trash can.



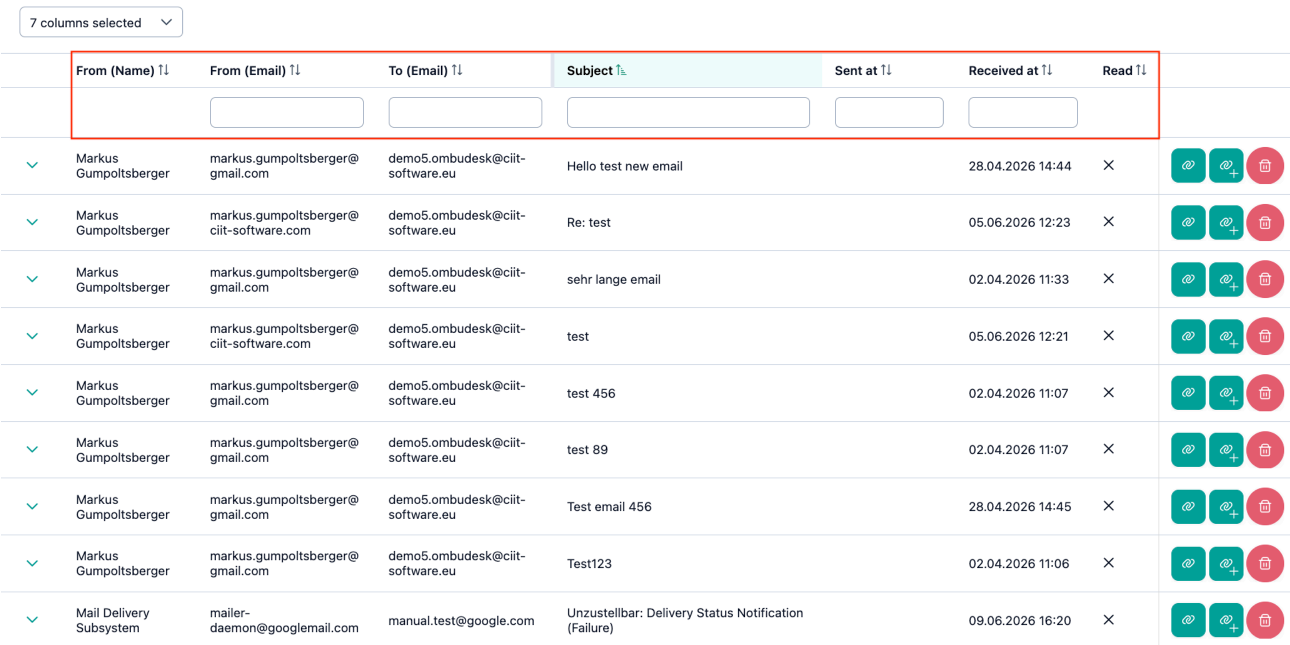
What information is displayed to you in this view?



In the unassigned messages view, you always see all relevant information about a message or email:

- **Name**: The name of the sender
- **Sender/Recipient**: The name of the sender / recipient
- **Subject:** The subject of the email.
- **Received on / Sent on:** Time of email receipt or email sending.
- **Read**: Indicator of whether the message has already been read.

What filter or search functions are available to you in this view?

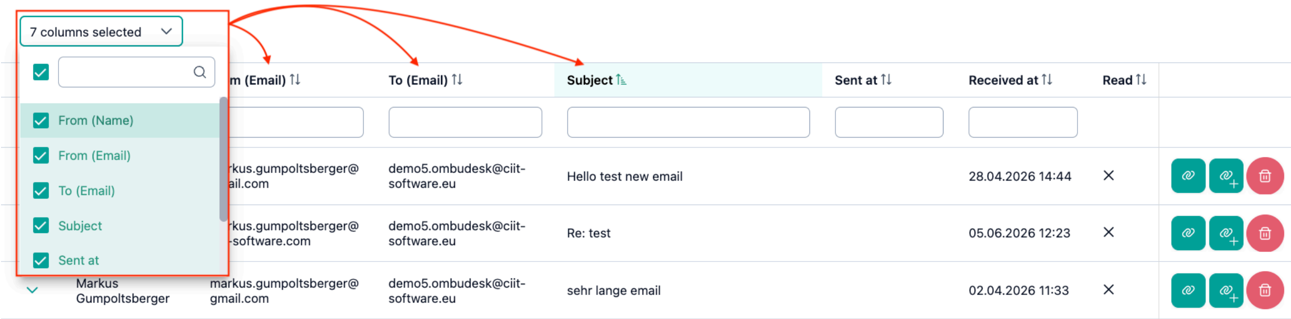


On the one hand, you can filter or search through the senders/recipients and the subject via **free text search**.

On the other hand, you can use the date filter for the send or receive date as a filter or search field.

Additionally, you can change the displayed data fields as you wish.

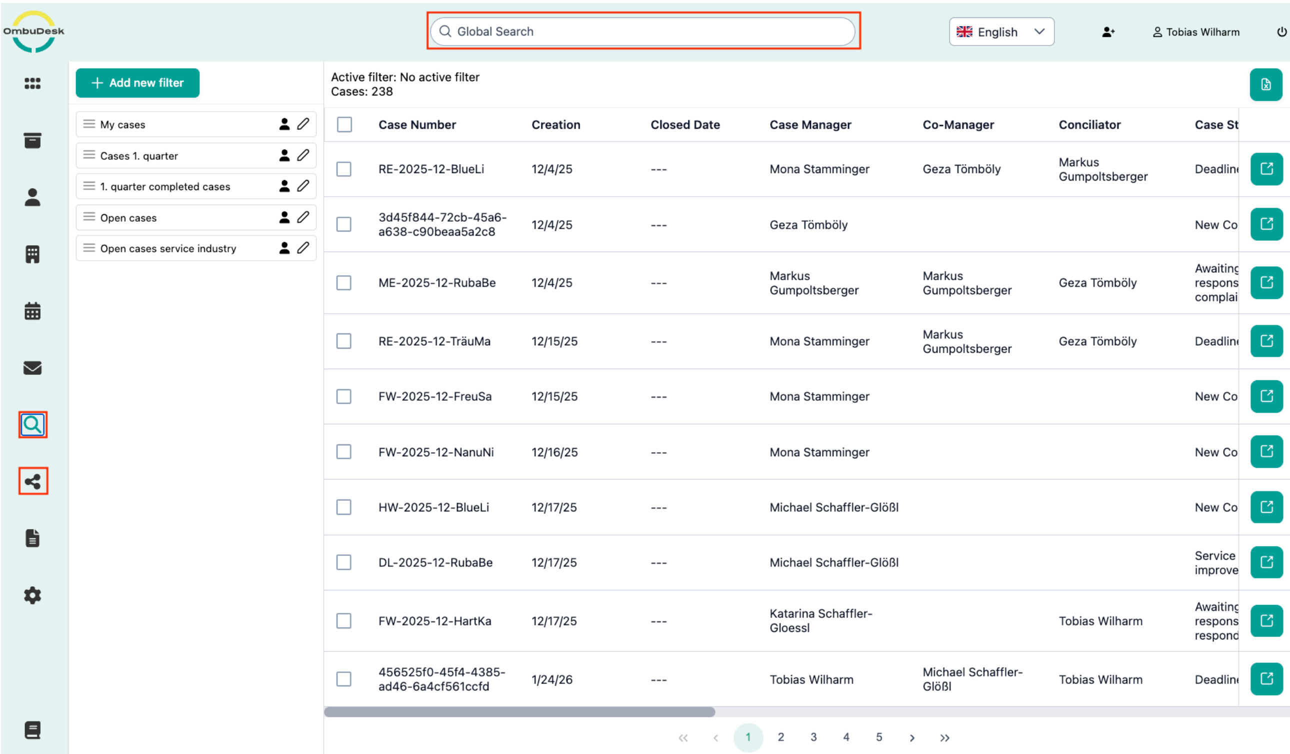
To do this, you can **select or deselect** the displayed columns:



Search

You have three options to search in OmbuDesk:

1. The **global search** (outlined in red at the head of the application)
2. The **filter search** (the magnifying glass outlined in red in the left navigation)
3. The **similarity search** (the open triangle outlined in red in the left navigation)



Global Search

The global search is a powerful tool to search all data in OmbuDesk via free text search.

Which contents are searched by the global search?

The global search works for the following information in your entire data set:

- **Messages**: Subject and content are searched.
- **Documents**: Document names and the entire content are searched.
- **Notes**: Names and contents of all notes are searched.
- **Deadlines**: Names of the deadlines are searched.

- **Tags**: Assigned tags are searched.

How does the global search work?

The global search is an integrated search engine.

The global search behaves similarly to common search engines you are used to, e.g., Google.

You can refine your search with the following **search commands**:

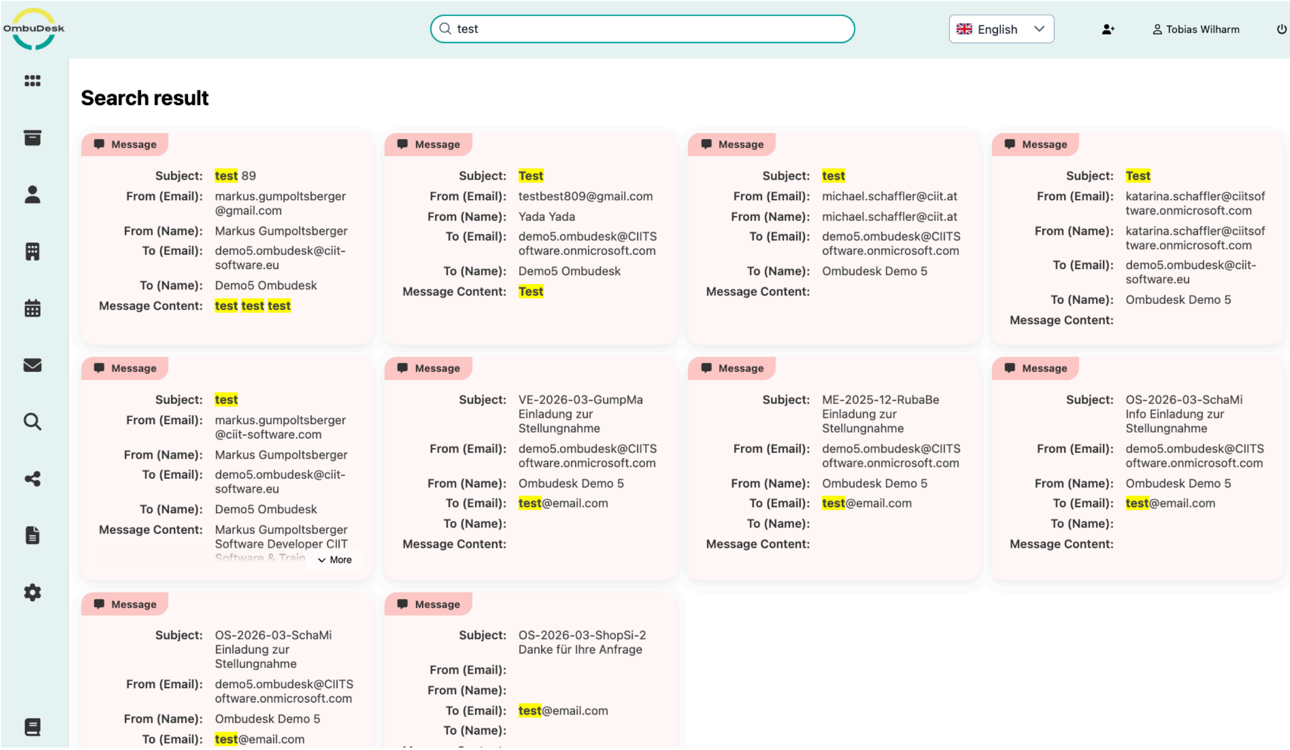
Global Search Guide

The Global Search searches – in addition to classic documents – deadlines, notes, case descriptions and messages.

- `Word` – shows all hits containing the term "Word"
- `"exact phrase"` – searches exactly for the specified phrase
- `Word1 AND Word2` – both terms must appear in the result
- `Word1 OR Word2` – at least one of the terms is sufficient
- `Word*` – Wildcard for any endings (e.g. "Word*" finds "Words", "Wording" ...)
- `Word~` – Fuzzy search: also finds similarly spelled words (e.g. "Word~" returns "Wurd", "Wordd" ...)

The search is not case-sensitive. Special characters can be masked with \.

How are your search results shown?

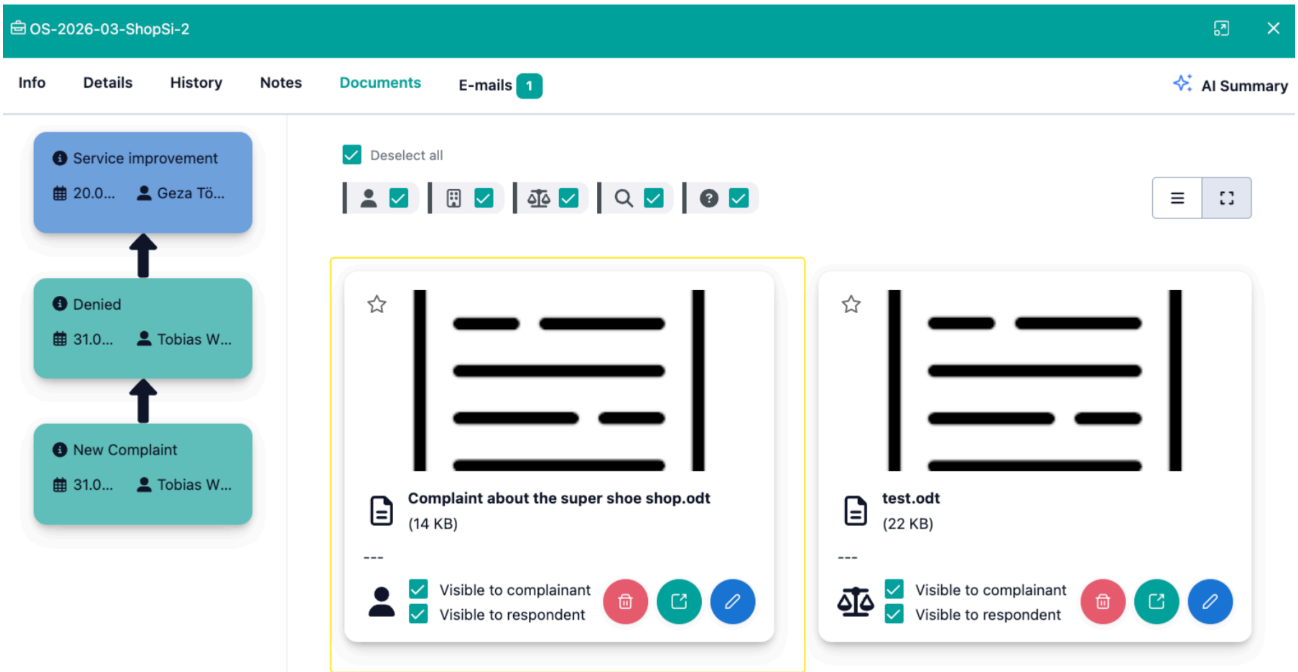


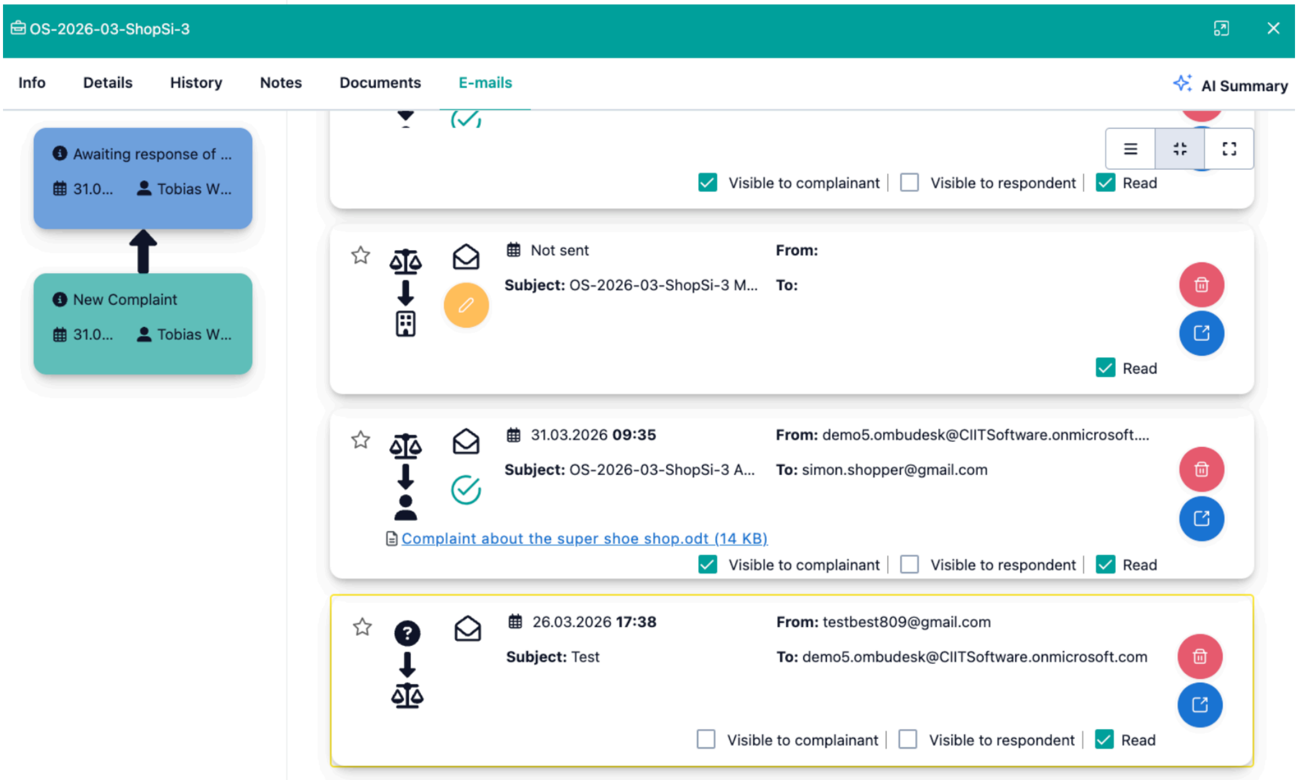
1. The application **highlights** the searched term(s) in **yellow** for each of your hits.
2. The application **groups** your hits by the type of content found (documents, messages, deadlines, etc.)

How do you navigate to the found hits of your search?

You can call up any search result with a click.

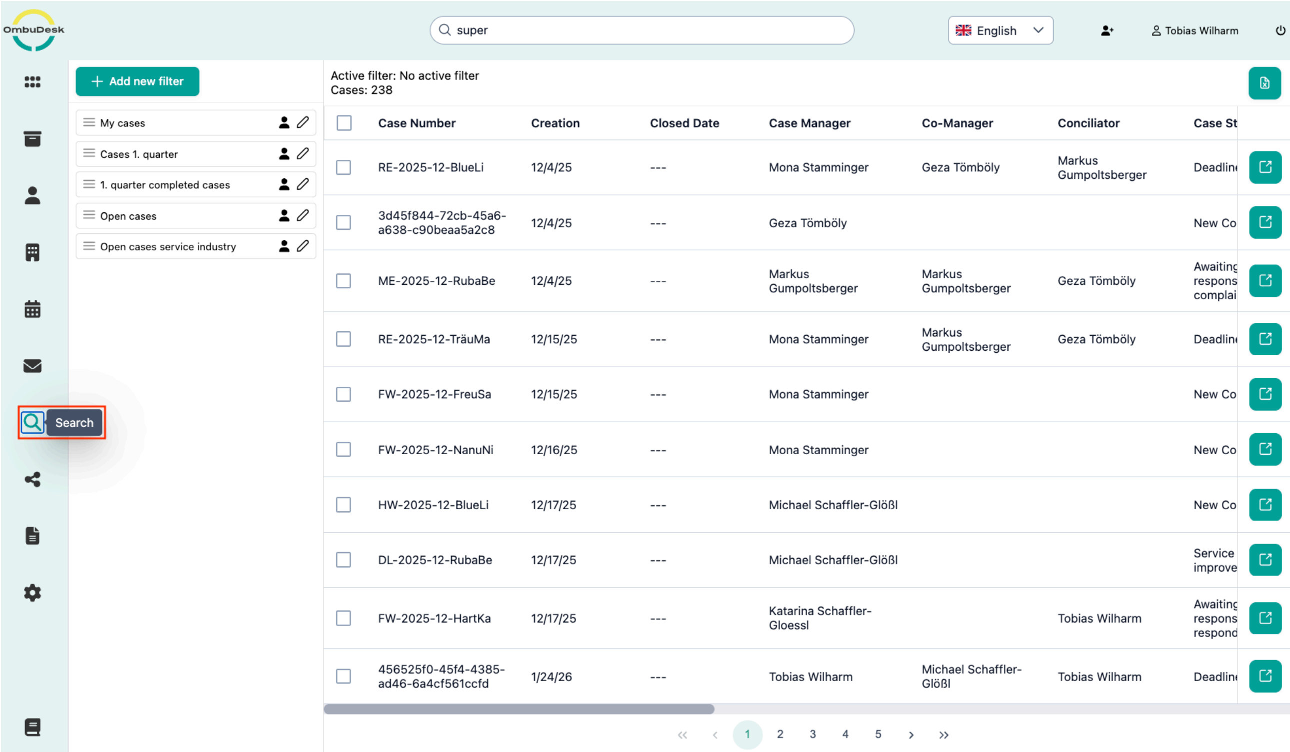
If you click on a search result, the linked file is opened directly and the hit is outlined in yellow.





Filter Search

The filter search allows you to search your entire data set with **filters or conditions**.



How does the filter search work?

You can use all **data fields of the Info tab** as well as your **custom fields** as filter conditions.

This allows you to use the following fields as filter conditions:

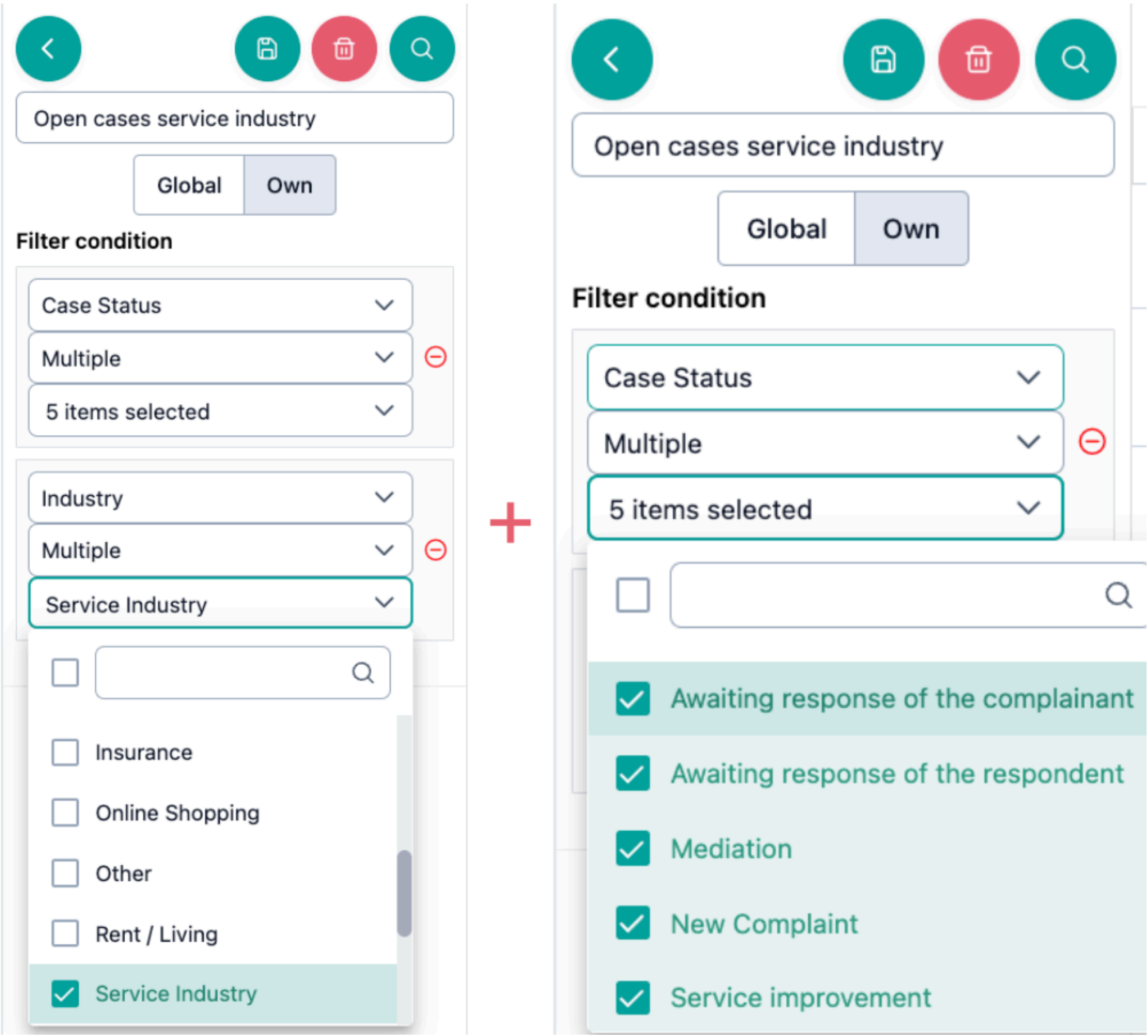
1. Data fields like: Creation date, case status, industry, sub-industry, tags, case manager, conciliator, etc.

2. Custom fields like: Rejection reason, special procedure, and mediation result, etc..

In practice, almost all fields of a file are possible **search filters**. This gives you great flexibility and many possibilities when filtering your data set.

Here is an example:

If you want to see all **open cases** for a certain industry, e.g., **Service Industry**, you can achieve this with the following settings:

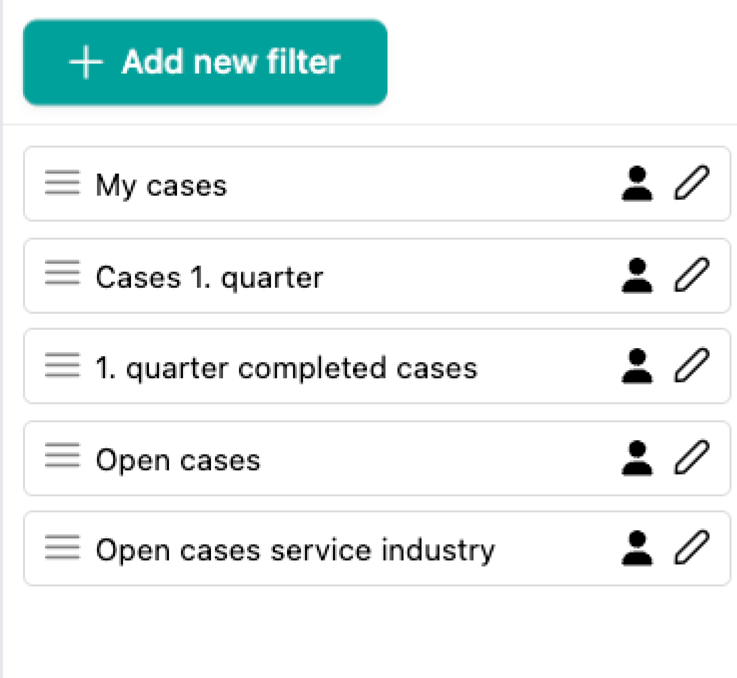


With these settings, you capture all case that are not yet completed and belong to the Service industry. The result is all **open cases in the service industry**:

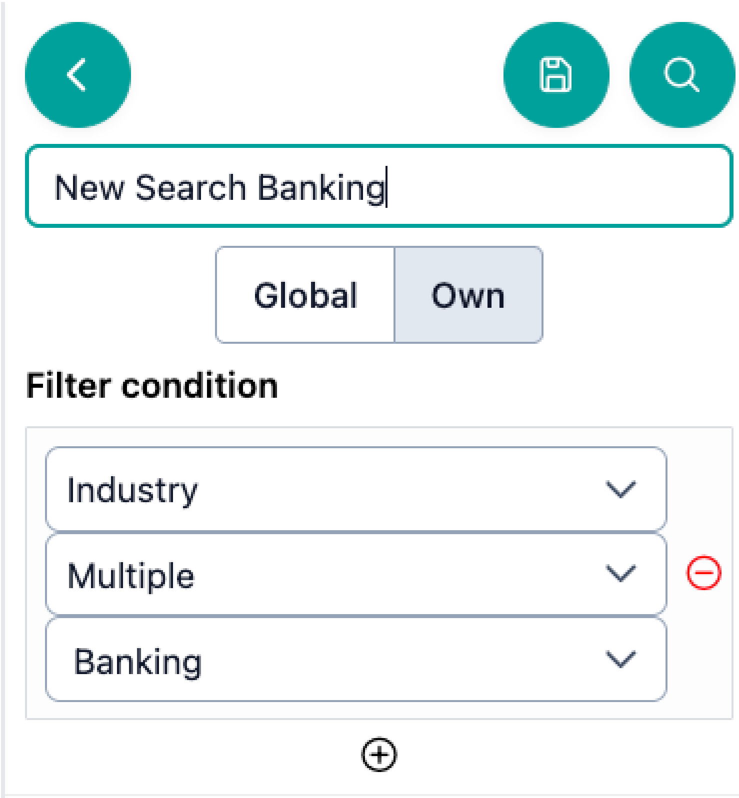
In this example, you can see that the amount of matching cases is displayed next to the name of the filter as "Cases: 4".

What actions are available to you in the filter search?

You can create a **new search** at any time via the green **"Add new filter"** button at the top left of the view.

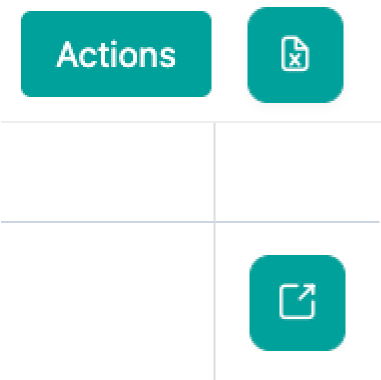


If you click the button, you can assign a **name** for the **new search** and add the **filter options** of your choice. Additionally, you can define whether the new search should be **Global (visible to everyone)** or **Own (visible only to you)**.



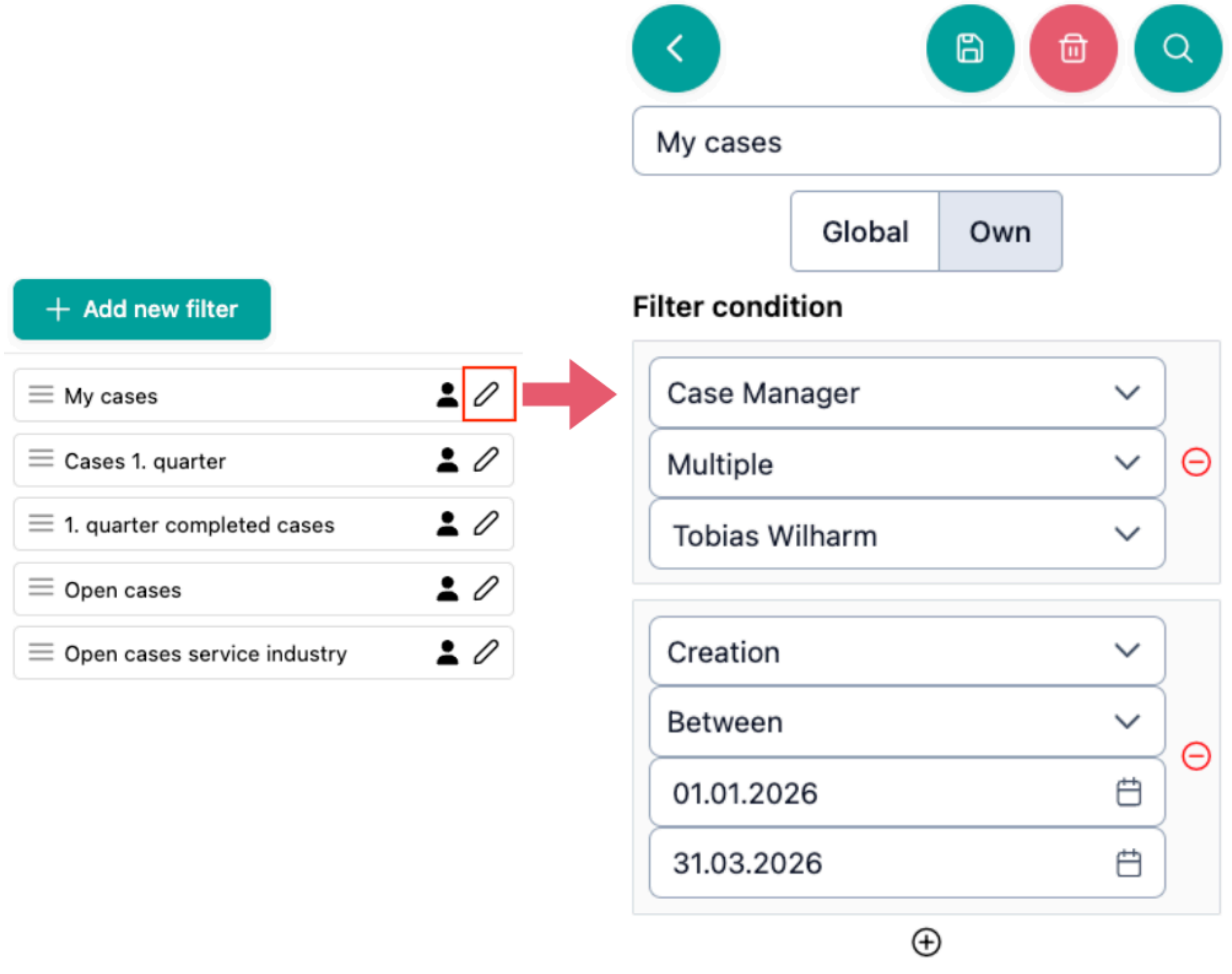
On the right edge of the window, you will find **additional actions** that allow you to:

1. **Download all data**: Create an Excel export of all found files with a click using the green document button.
2. **Bulk actions**: Apply "Change case status" or "Change of responsibility" for all search results marked by you via the green action button.
3. **Open file**: Open a case that was found by your filter search via the green arrow symbol.



In addition, you can edit any saved filter search at any time via the green pencil symbol on the far right.

You can then **adjust the filter conditions**, **delete the search**, **perform the search** with the current settings, and **change visibility (Global/Own)**:



What information do you see for each search result?

When you perform a filter search, the following information is listed in tabular form for the corresponding cases:

1. Case number
2. Creation date & completion date
3. Case Manager, Co-Case Manager & Conciliator
4. Status and Sub-status
5. Complainant + email
6. Representative
7. Respondent

8. Expert
9. Industry & Sub-Industry

You can move the view using the gray slider at the bottom to view all information.

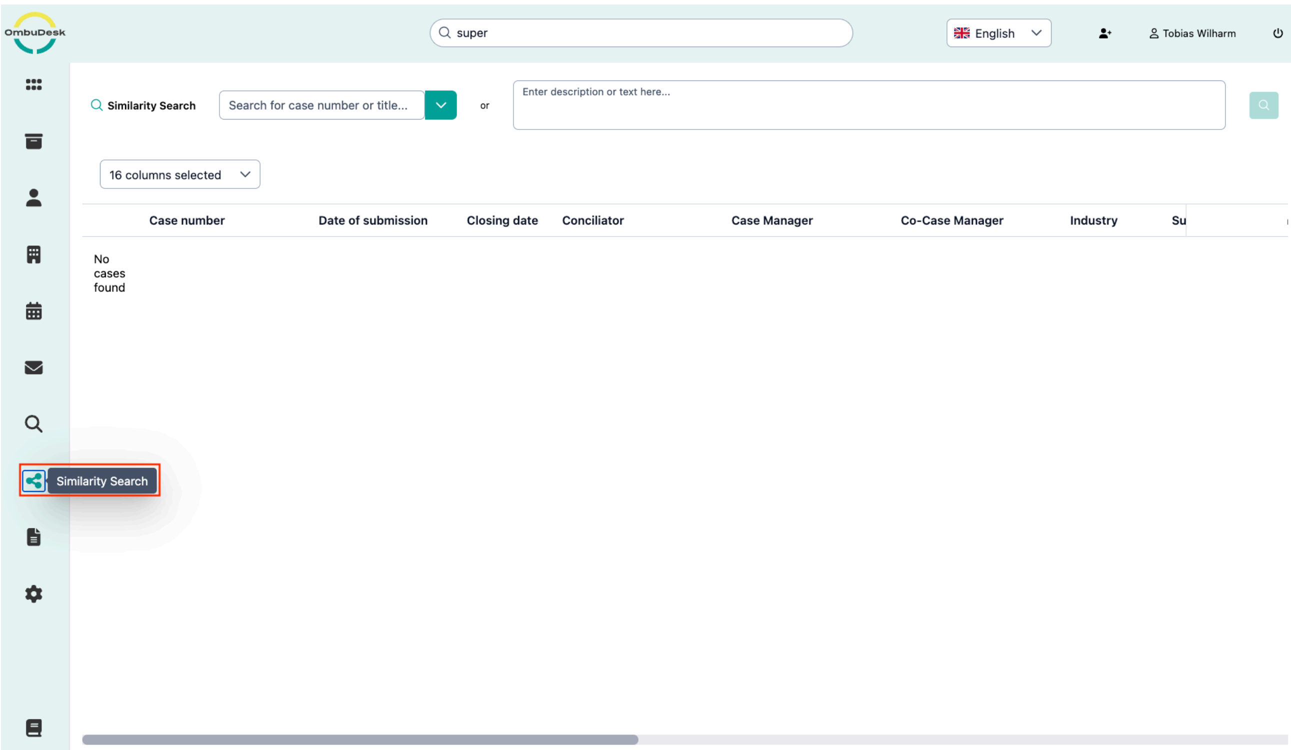
What makes the filter search particularly useful for your dispute resolution office?

The filter search is a powerful search function because you can customize all search parameters yourself. Additionally, you can save any search created this way and repeat it instantly with a click on a stored search.

The filter search is also linked to your overview. This means you can visualize important key figures for your dispute resolution office. You can find more about this under Overview.

Similarity Search

The similarity search allows you to find **similar cases** in your entire data set.



How does the similarity search work?

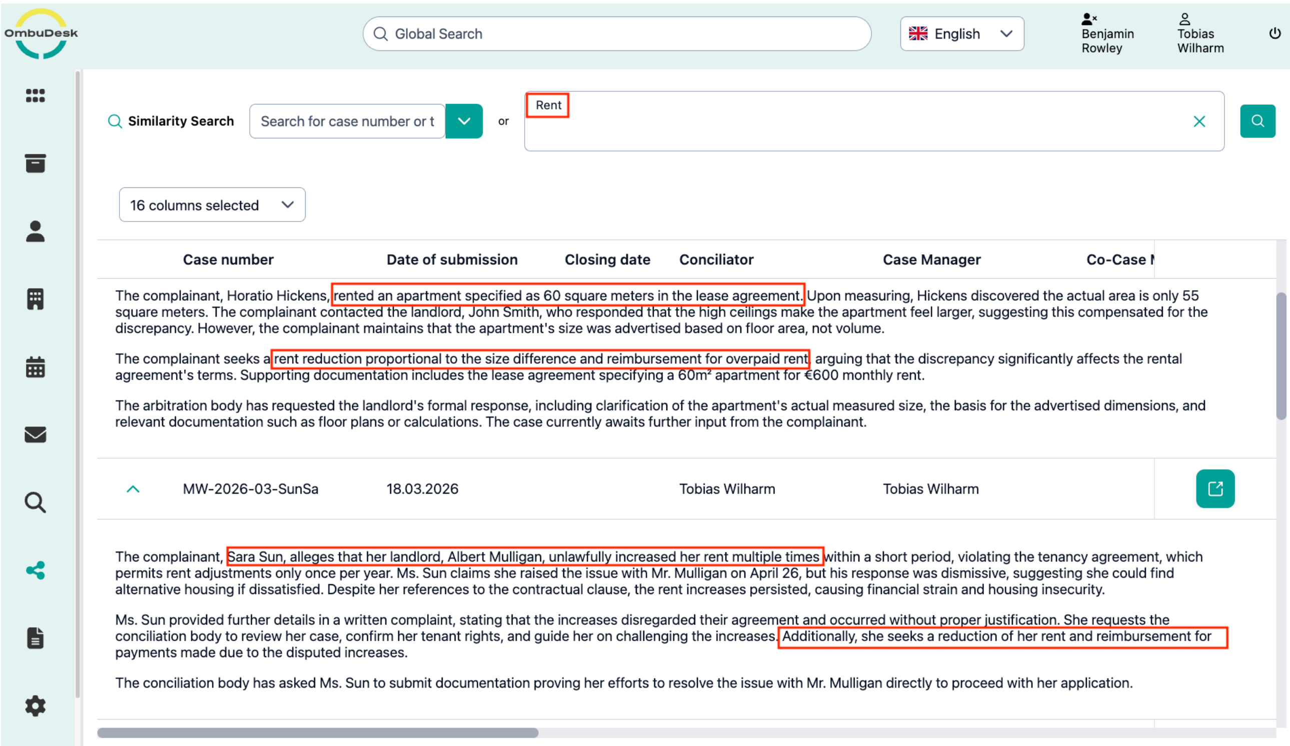
Unlike the global search and the filter search, the **similarity search** does not refer to searchable data or various case attributes.

The similarity search uses **case summaries** of your files to establish a **context** with the help of AI and thus find **similar cases**.

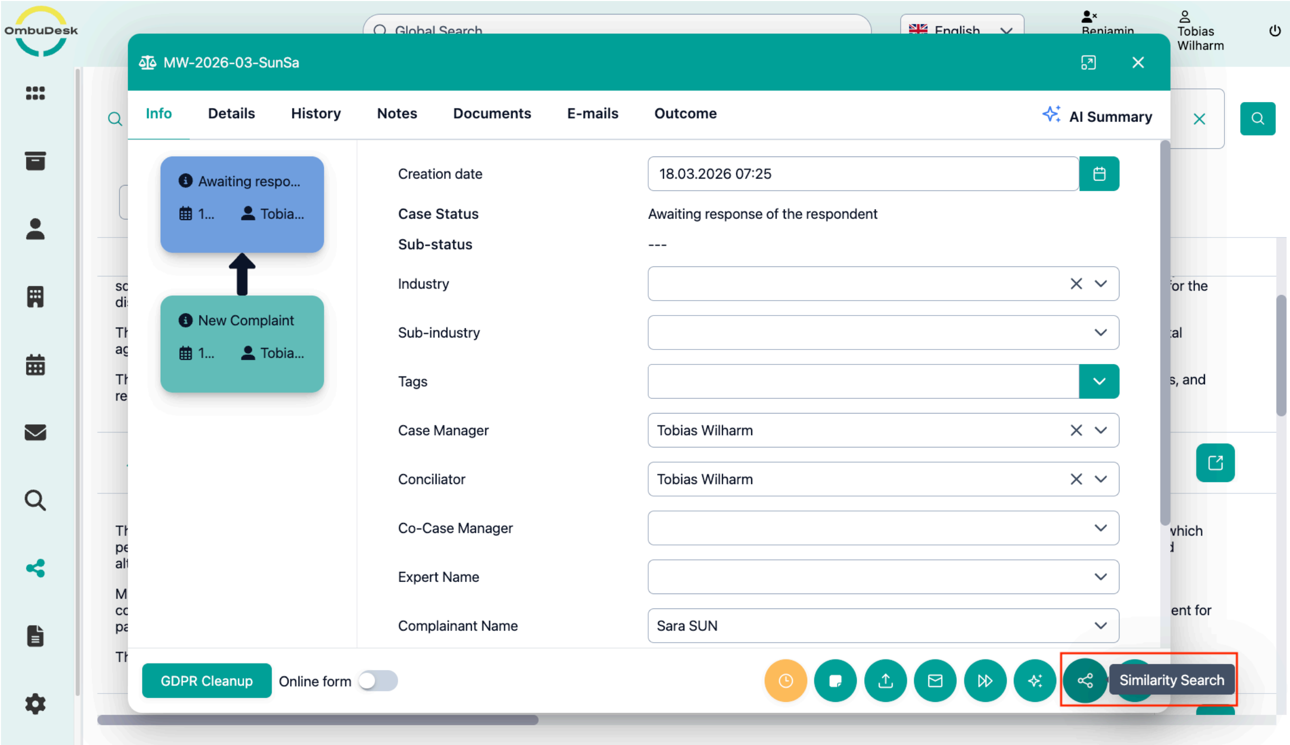
How can you use the similarity search?

You can either ...

... use the **free text field** to find similar cases for terms of your choice.

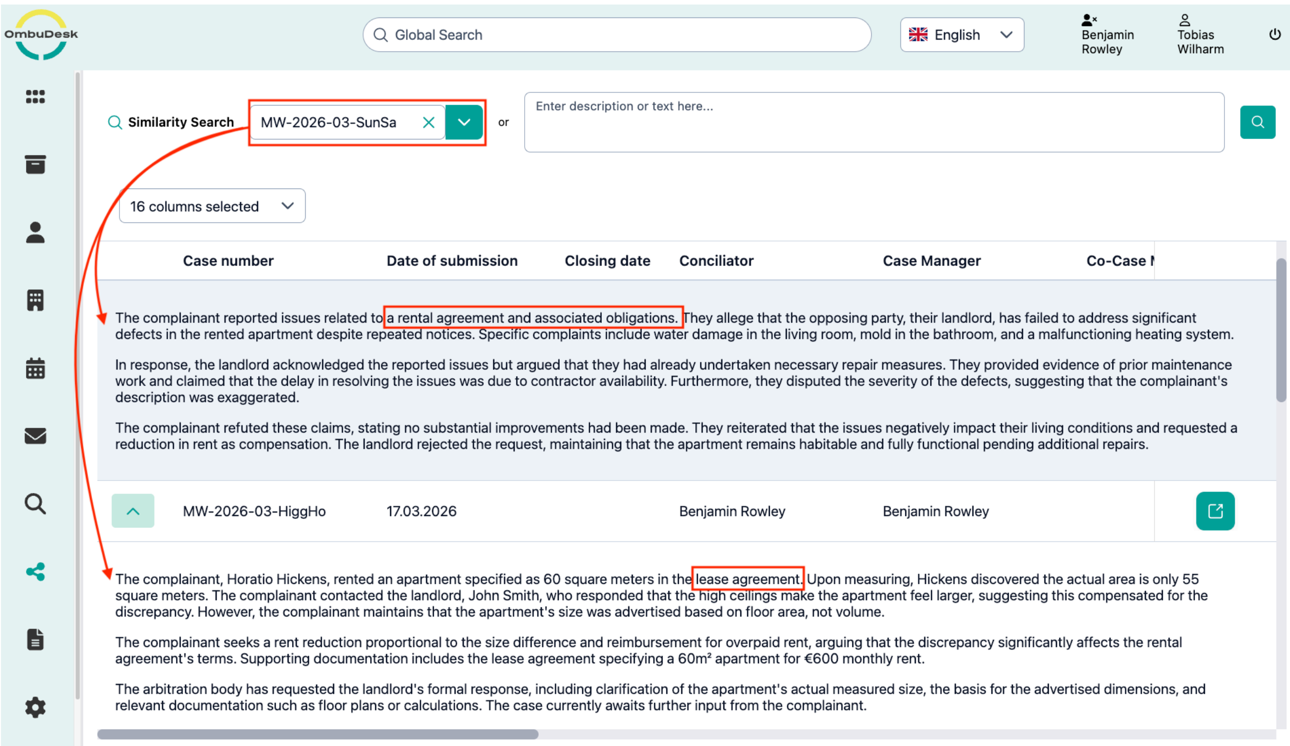


... or call up the similarity search within a digital **case file** to find **similar cases** to the opened case.



In this example, it is an arbitration application in the online shopping industry dealing with **dissatisfaction regarding the received goods**.

The similarity search now finds **relevant & similar cases** involving complaints:

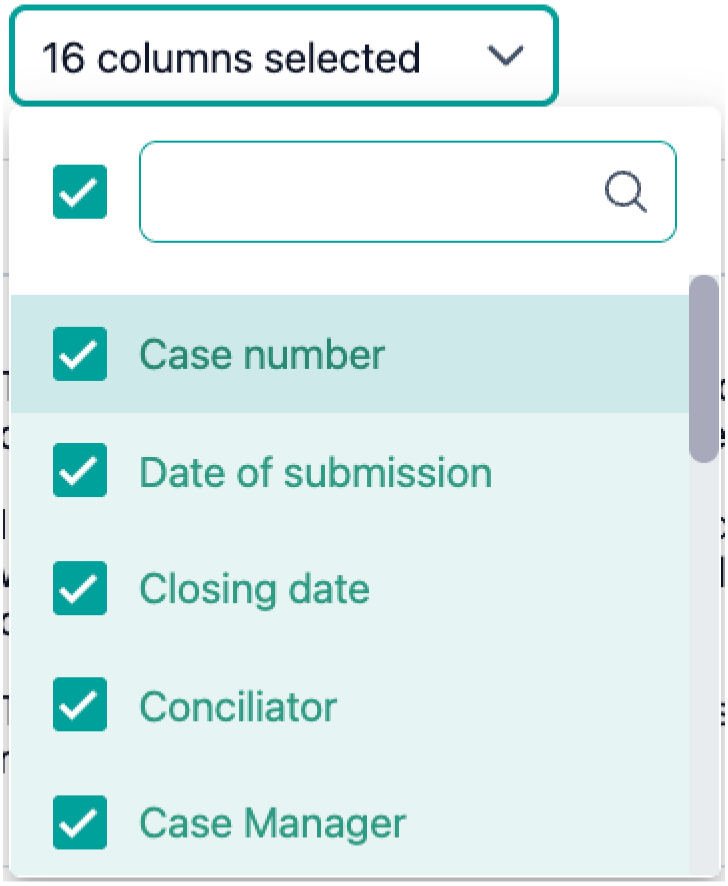


What actions are available to you in the similarity search tab?

The similarity search always opens in a new window. From there, you can navigate to the found similar cases via the green arrow on the right edge.

What information is displayed for the found cases?

You can adjust the tabular information at any time via the column selection and thus filter out important information for you.



The following information columns can be selected or deselected for display:

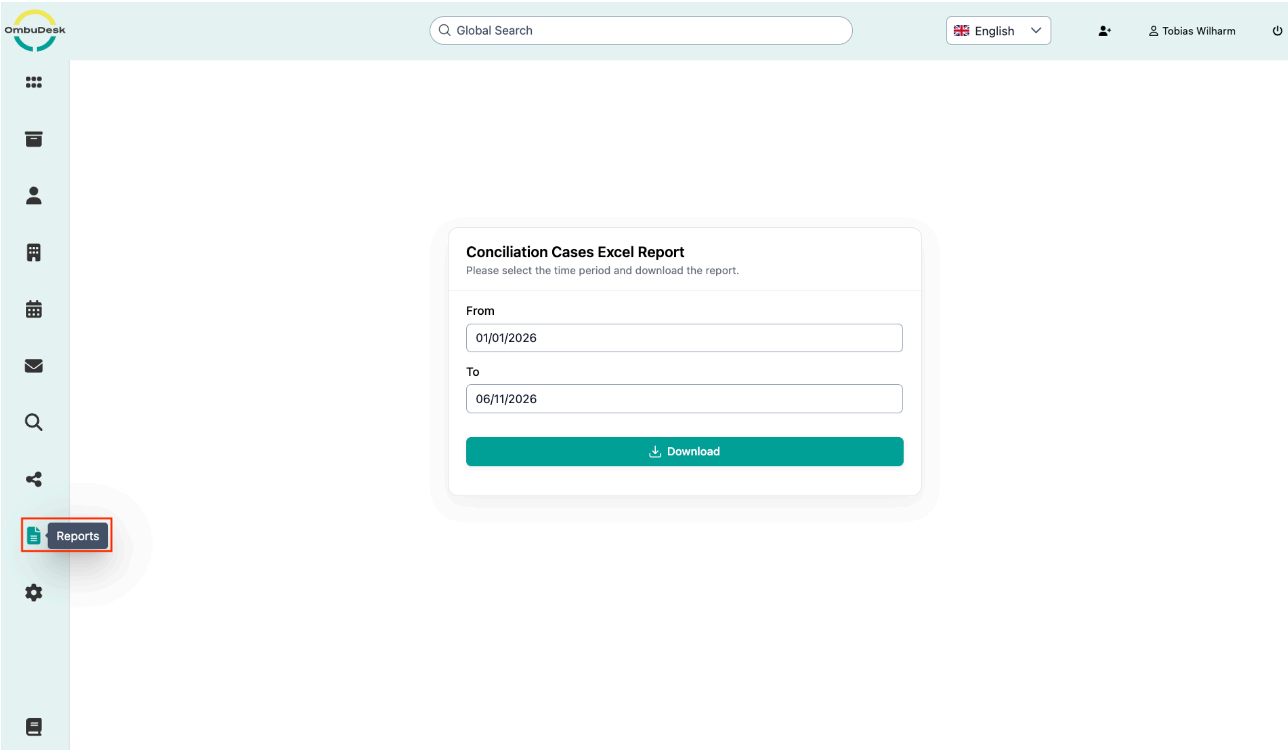
1. Case abbreviation
2. Creation date
3. Completion date
4. Conciliator, Case Manager and Co-Case Manager
5. Industry and Sub-Industry
6. Status and Sub-Status
7. Name of respondent and representatives
8. Report relevance

9. Tags

Reports

OmbuDesk allows you to create **automated reports**.

Automated Reports



What information does an automated report contain?

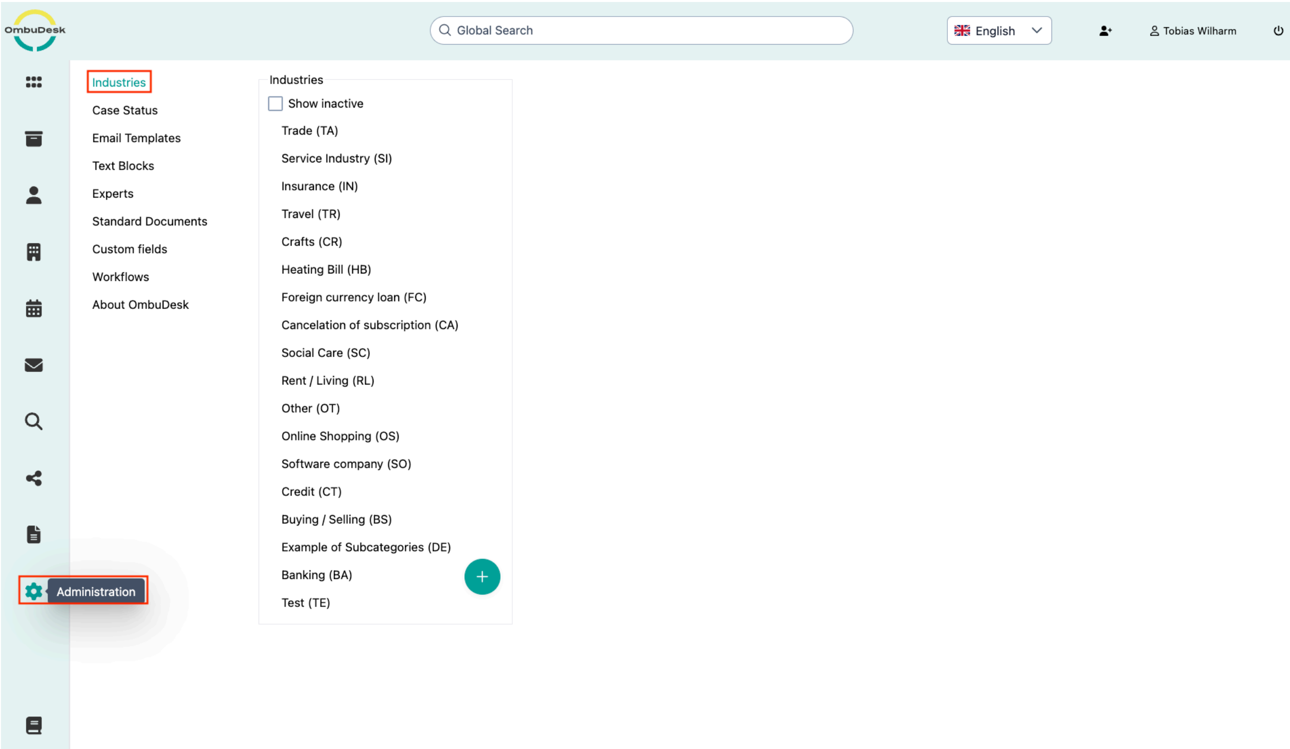
The reports in OmbuDesk are tailored to your preferences. With one click, you receive all the data you need for your reports.

If you are already using OmbuDesk, you can easily download your reports via one click in this tab.

Industries

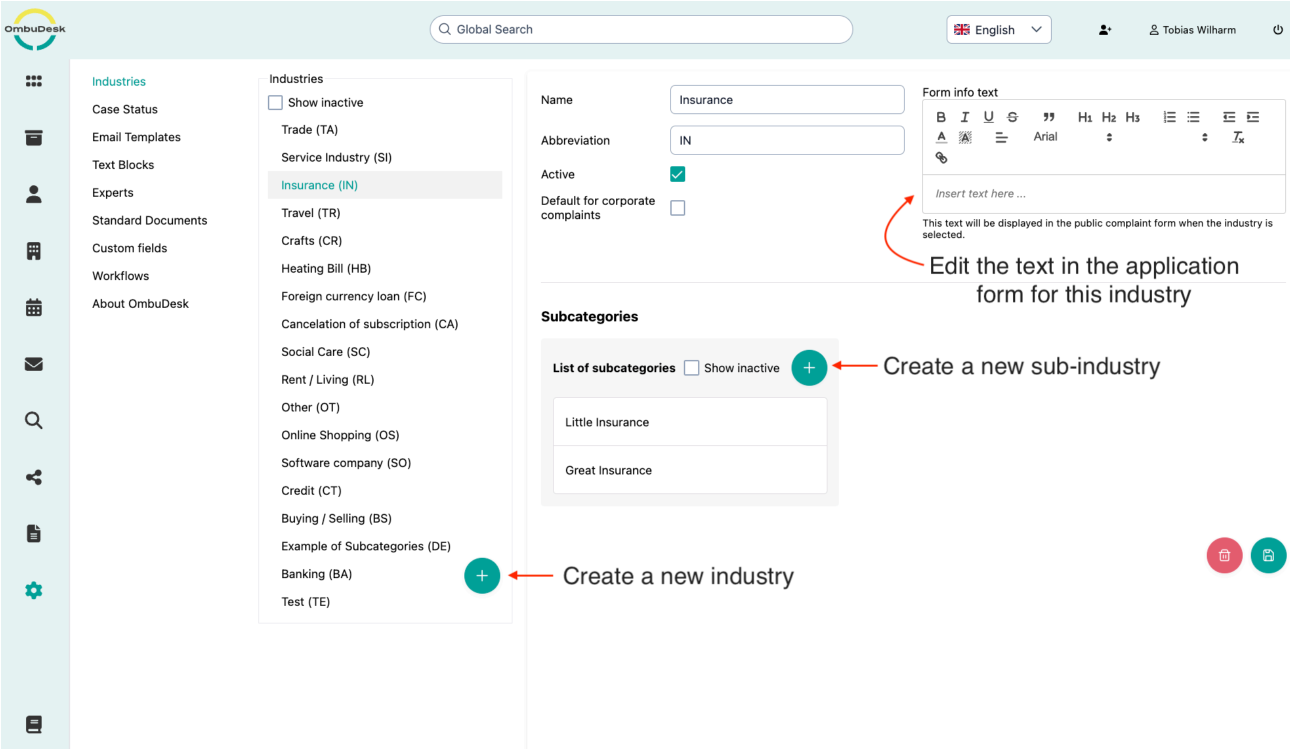
The settings page for industries offers you a dual functionality:

On the one hand, you can **manage your industries** here and determine for which industries your dispute resolution office is responsible. On the other hand, all **changes are transferred to your application form**.

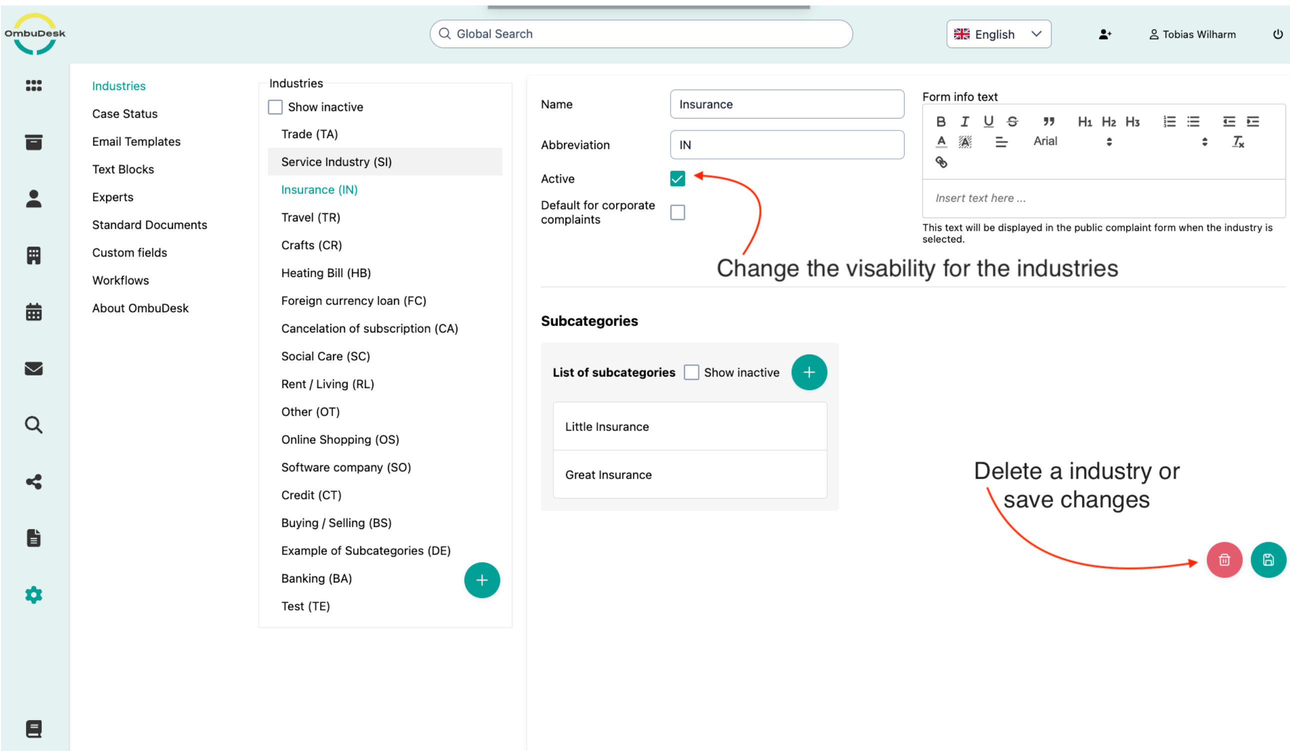


What settings are available for your industries?

- **Add new industries**: You can add new industries at any time via the plus symbol.
- **Edit existing industries**: You can edit the name, abbreviation, activity/visibility, and sub-industries at any time.
- **Supplement/change form text for industries**: You edit which text is displayed upon selection in the application form via the text editor.



- **Hide/delete existing industries**: You can hide or delete existing industries at any time.
- **Save changes**: If you make changes to industries, you must save them to update the information.



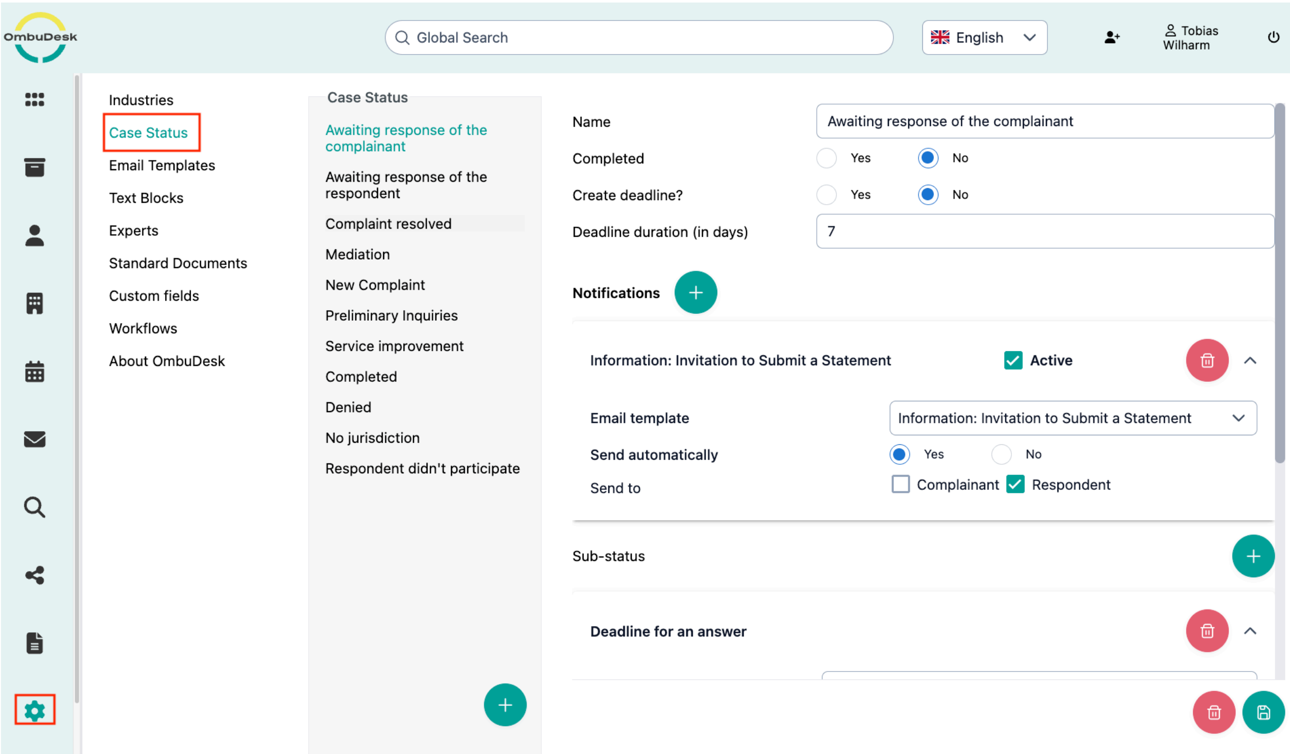
What happens if you delete an industry?

If you delete an industry, the industry is no longer selectable in the application form or in the internal view.

Important note: All digital case files with the industry to date retain the industry to continue allowing unbiased statistical analyses.

Case Status

The case status is the central tool to process a case along your processes. The case status settings allow you to customize all available case statues in the digital case file.



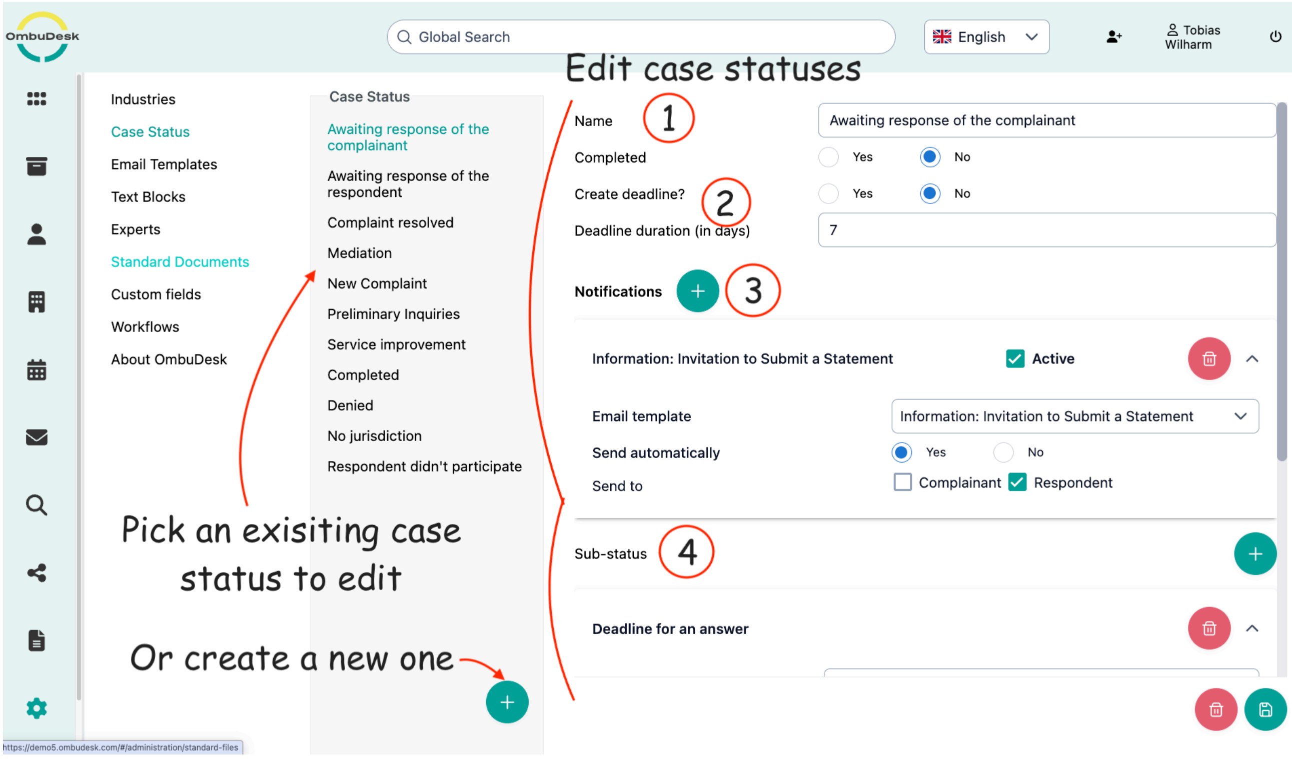
Which statuses are preconfigured in OmbuDesk by default?

You will find the following statuses in OmbuDesk if you have not made any changes yet:

1. **New Complaint**
2. **Awaiting response of the respondent**
3. **Awaiting response of the complainant**
4. **Mediation**
5. **Completed**
6. **Denied**
7. **No jurisdiction**
8. **Respondent didn't participate**
9. **Service improvement**

How do you adapt the statuses to your internal processes?

Click on a status from the list to **change an existing status** or create a **new status**.



Each status consists of four different parts:

1. **Basic Information**

The basic information includes the **name** of the status and whether the case is considered **"Completed"** with this status.

2. **Deadlines**

Each status can be linked to an **automated deadline**. As soon as you change a case to this status, OmbuDesk creates the associated deadline.

3. **Notifications**

Notifications can be added to automate part of your communication by sending **email templates** to one or both of your parties.

For example, you can link the status **"Awaiting response from respondent"** with an **automated message** to the respondent, in which this party receives the **basic information** about the case.

4. **Sub-status**

The sub-status offers you **additional flexibility** to design the status change according to your preferences.

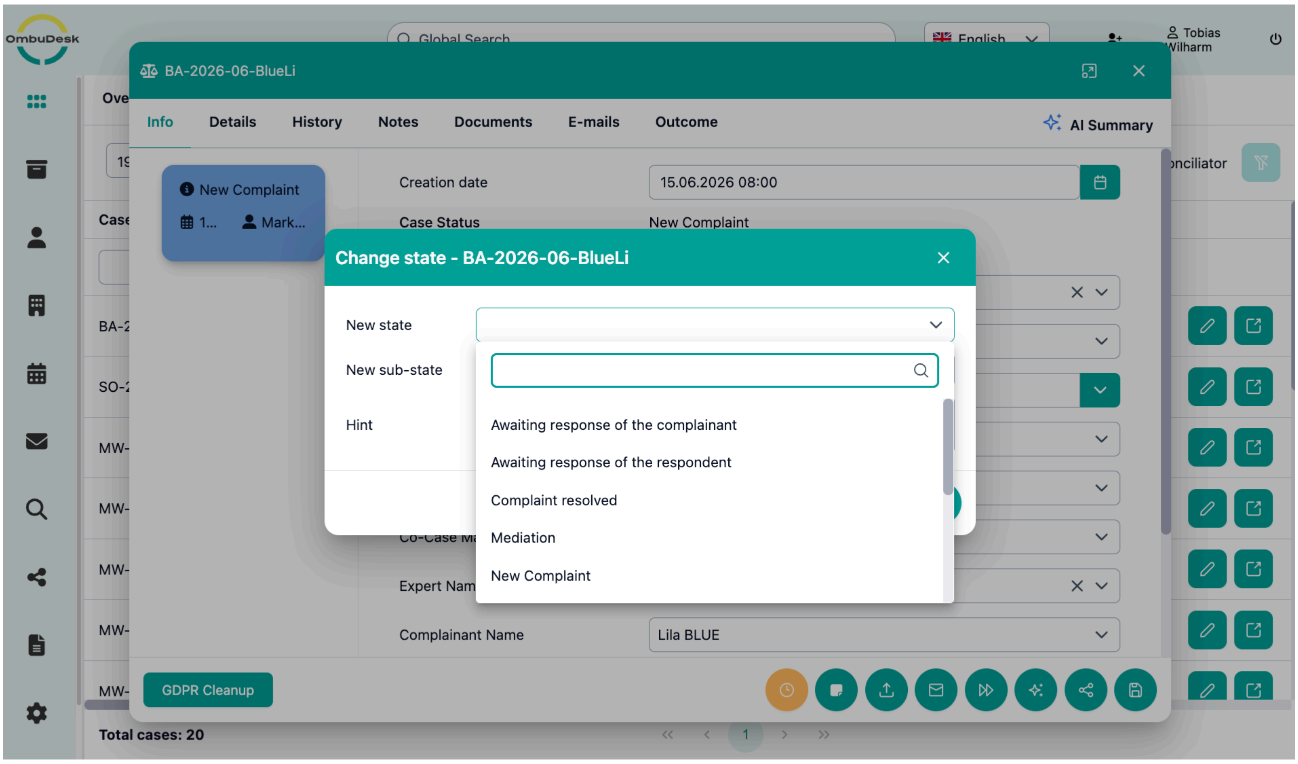
You can also use an automate email dispatch and the creation of deadlines here.

Important: The sub-status **always overwrites** all system actions of the status.

So you can use the sub-status to **map different scenarios** associated with a status.

One example is **escalation levels**. For example, you can sharpen the tone of the email templates after repeated failure to meet deadlines and send the correct email template via sub-status.

This is what your selection would look like as an example:



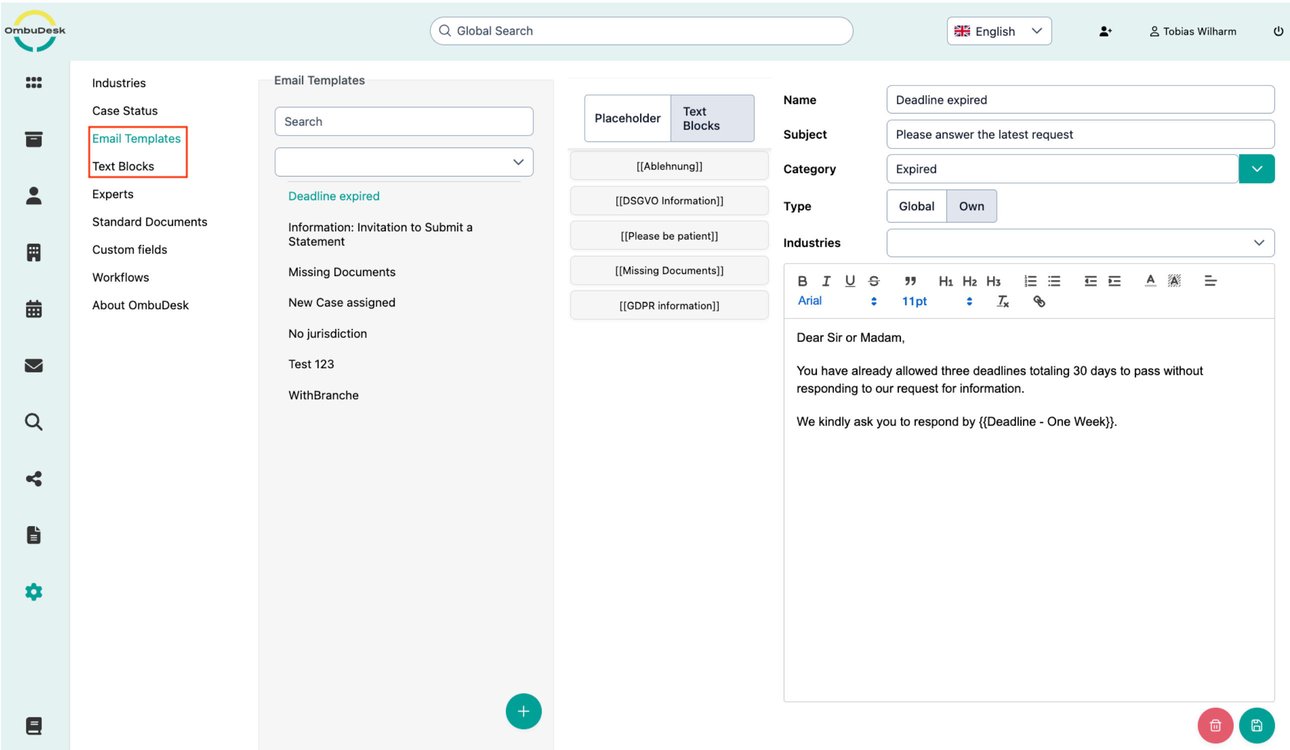
When is a case considered "Completed"?

You can decide in the settings for each status whether a case is considered "Completed" when switching to a certain status.

If you have not made any changes yet, a case is considered completed if the status is set to **"Completed", "Denied", "No jurisdiction"** or **"Respondent didn't participate"**.

E-Mail Templates, Text Blocks & Placeholders

E-mail templates, text blocks & placeholders allow you to drastically reduce the time needed for communication with your parties.

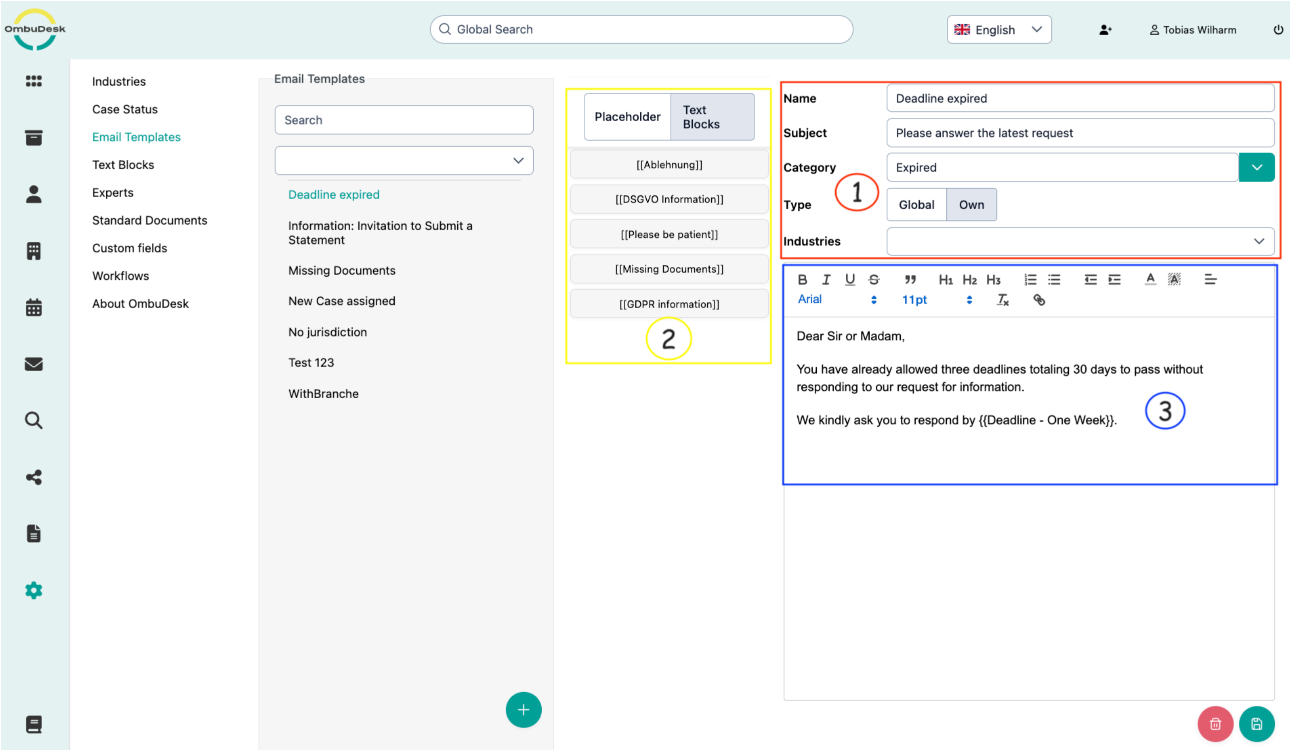


E-Mail Templates

E-mail templates are the largest framework to make your communication more efficient. Here you can create entire messages and send them automatically by linking them to a status change.

How do you customize an e-mail template?

The view in the settings consists of **three different components** with which you can design e-mail templates according to your preferences:



1. **Basic Information**:

You can assign a **name** to each e-mail template, set the **subject**, assign a **category** and define whether the e-mail template is visible to everyone (**Global**) or only you (**Own**).

2. **Text Blocks and Placeholders**

You can use the next smaller building blocks, namely the **text block** and the **placeholders**, to create e-mail templates.

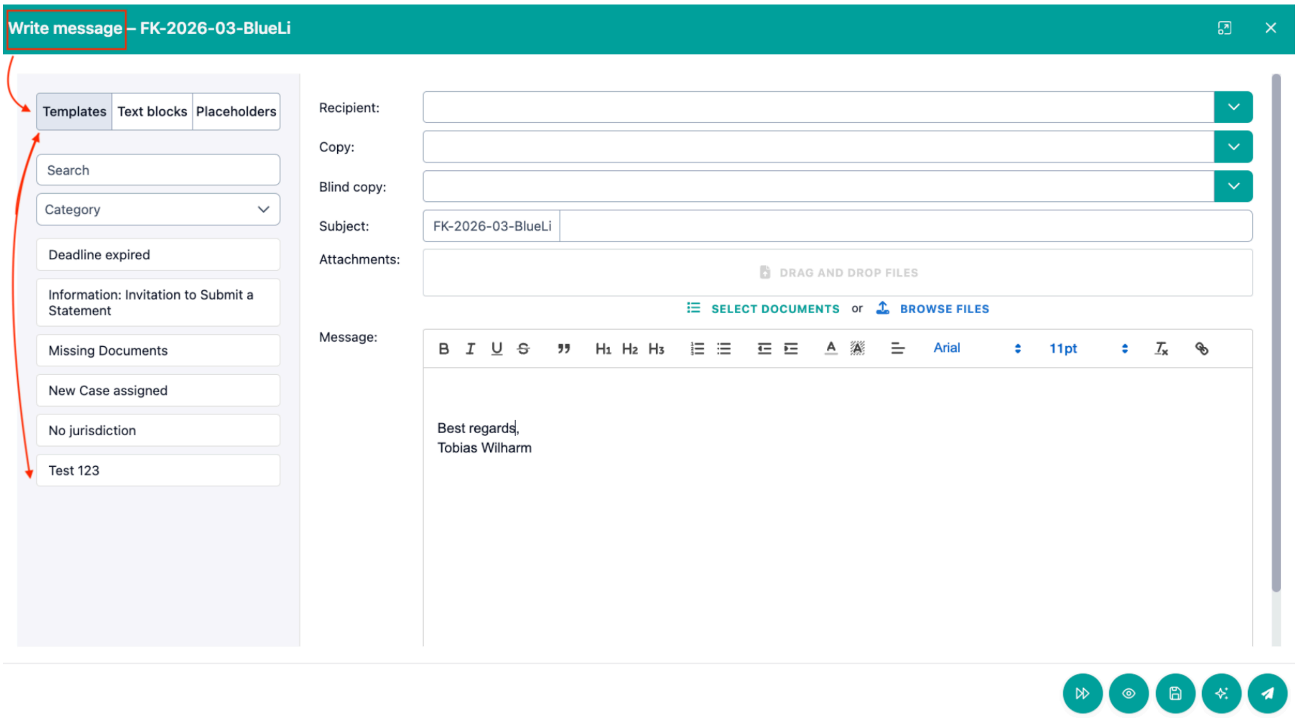
For this, you can click on the terms at the top to display the various elements and then use them via **drag & drop**.

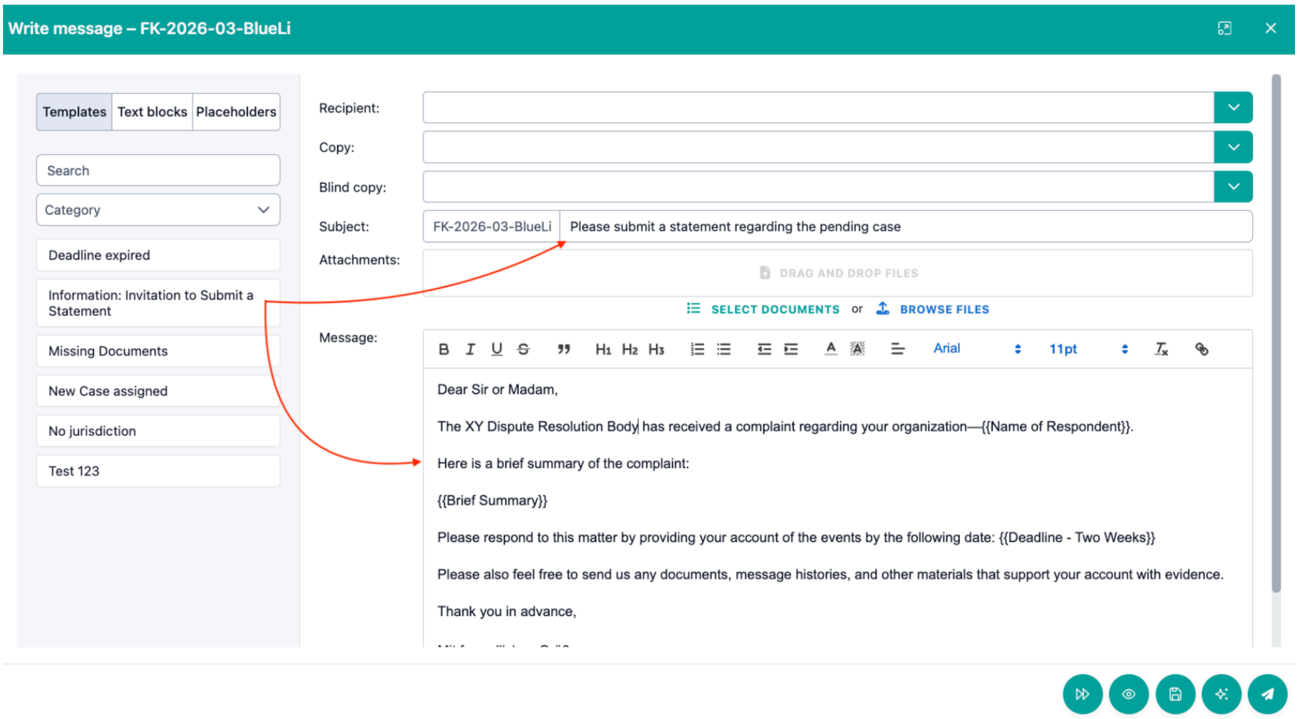
3. **E-Mail Editor**

Last but not least, you have access to the **e-mail editor** at any time to write components of the e-mail yourself, place the smaller building blocks (2) and thus define a finished e-mail template.

Where can you use an e-mail template?

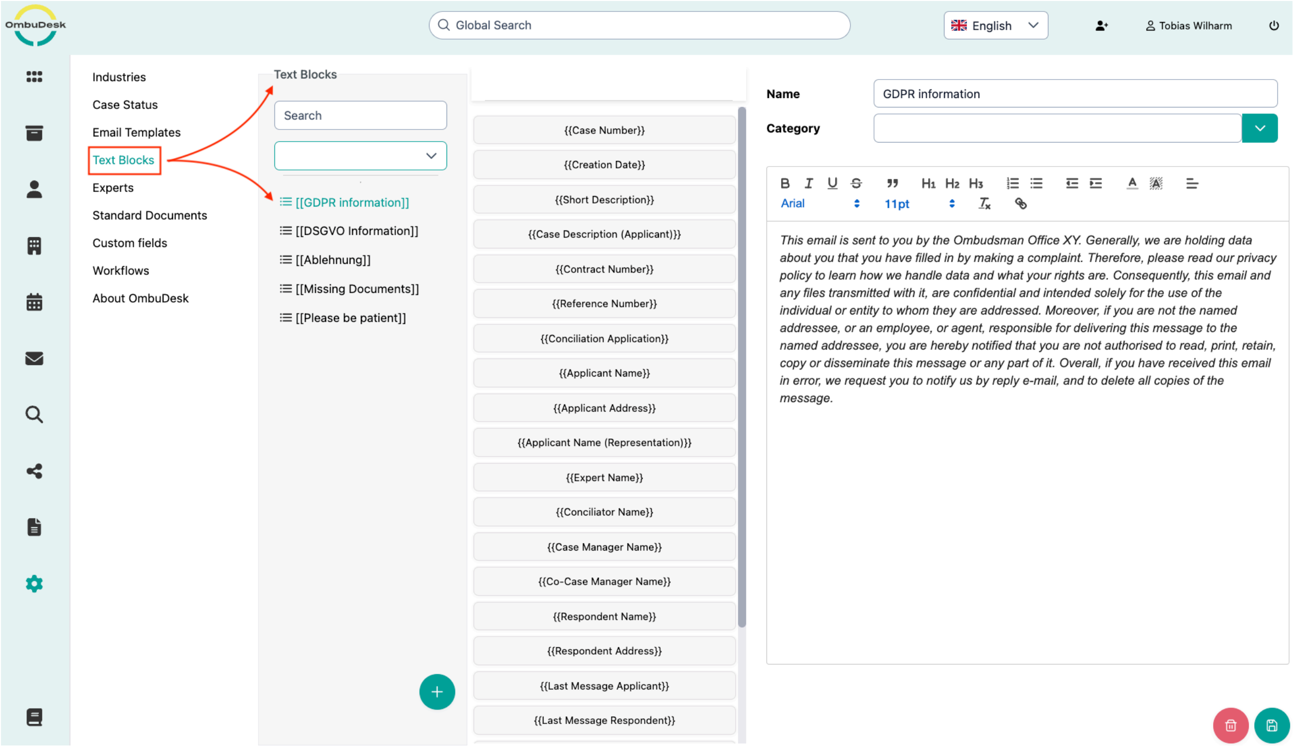
You can either **link e-mail templates with status changes** and have them sent automatically or create drafts for sending automatically, or manually access e-mail templates in the **"Write message" window**:





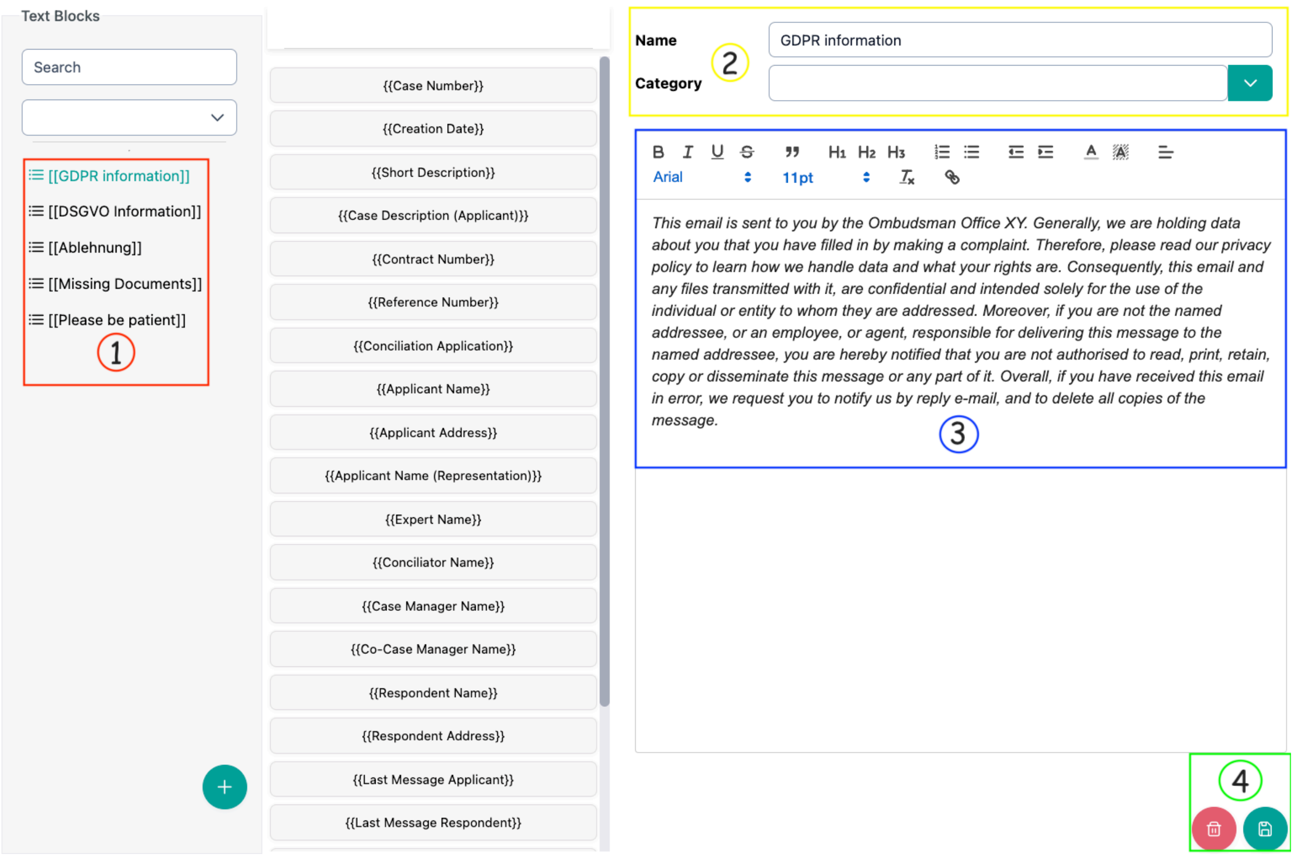
Text Blocks

Text blocks are the next smaller unit that can be predefined by you to reduce your manual workload in communication.



Text blocks usually contain sections of text that are used repeatedly. This could be, for example, your GDPR information.

How do you edit a text block?



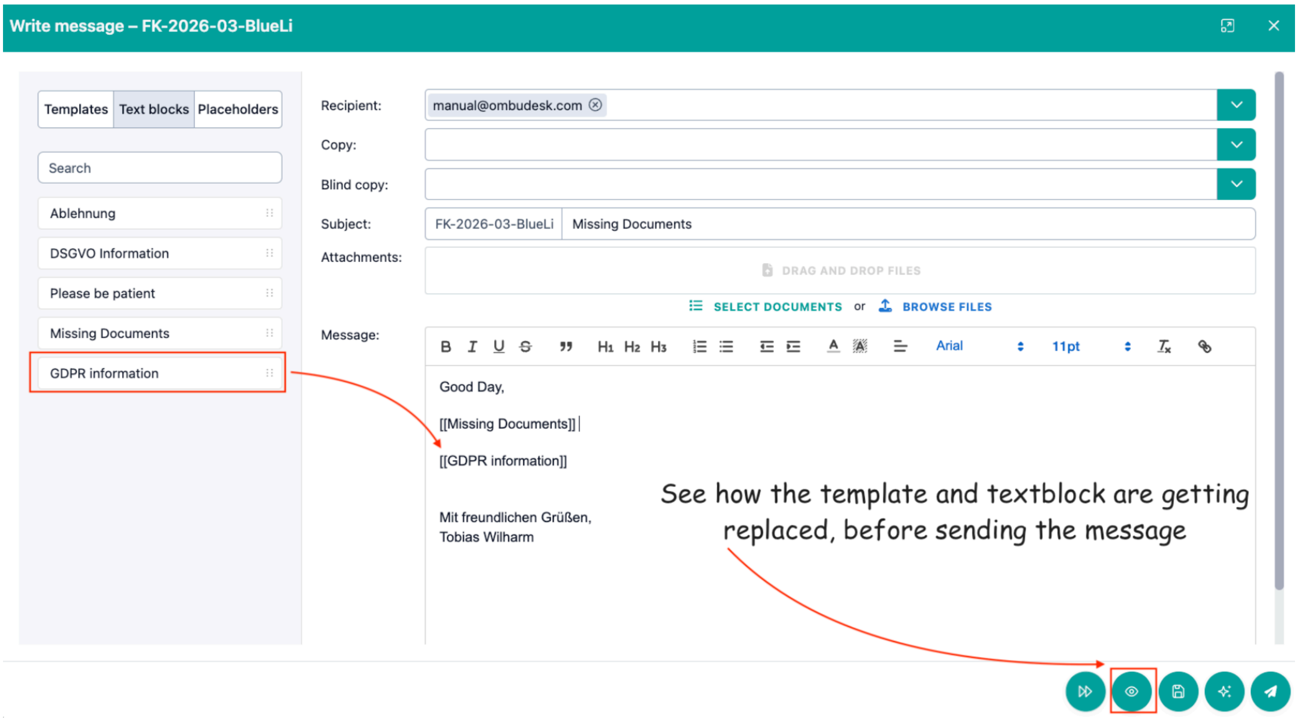
1. Select a text block from the list that you want to edit.
2. Assign a name and, if necessary, a category.
3. Edit the text block in the text editor window.
4. Save your changes at the bottom right.

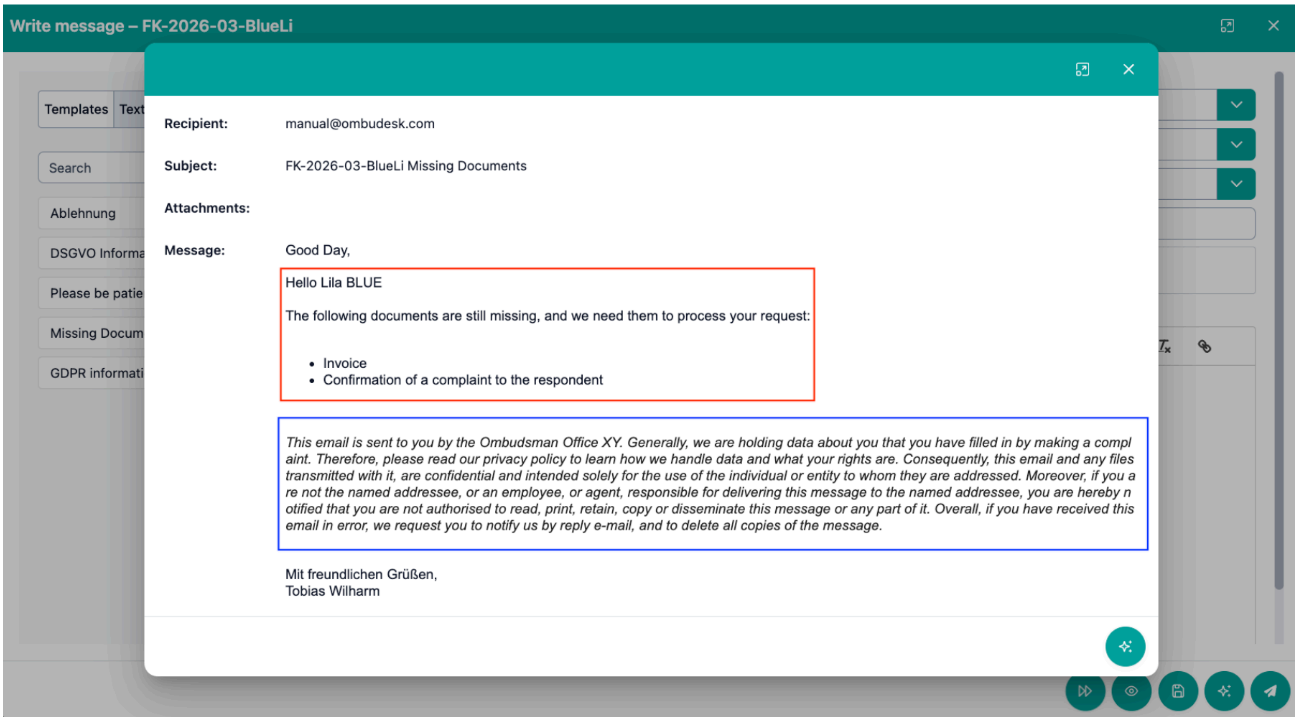
Text blocks can contain **placeholders**. Additionally, the **category** serves to make it easier for you to filter and find text blocks.

How do you use a text block?

You can use text blocks either in **e-mail templates** in the settings or in the **write message window**.

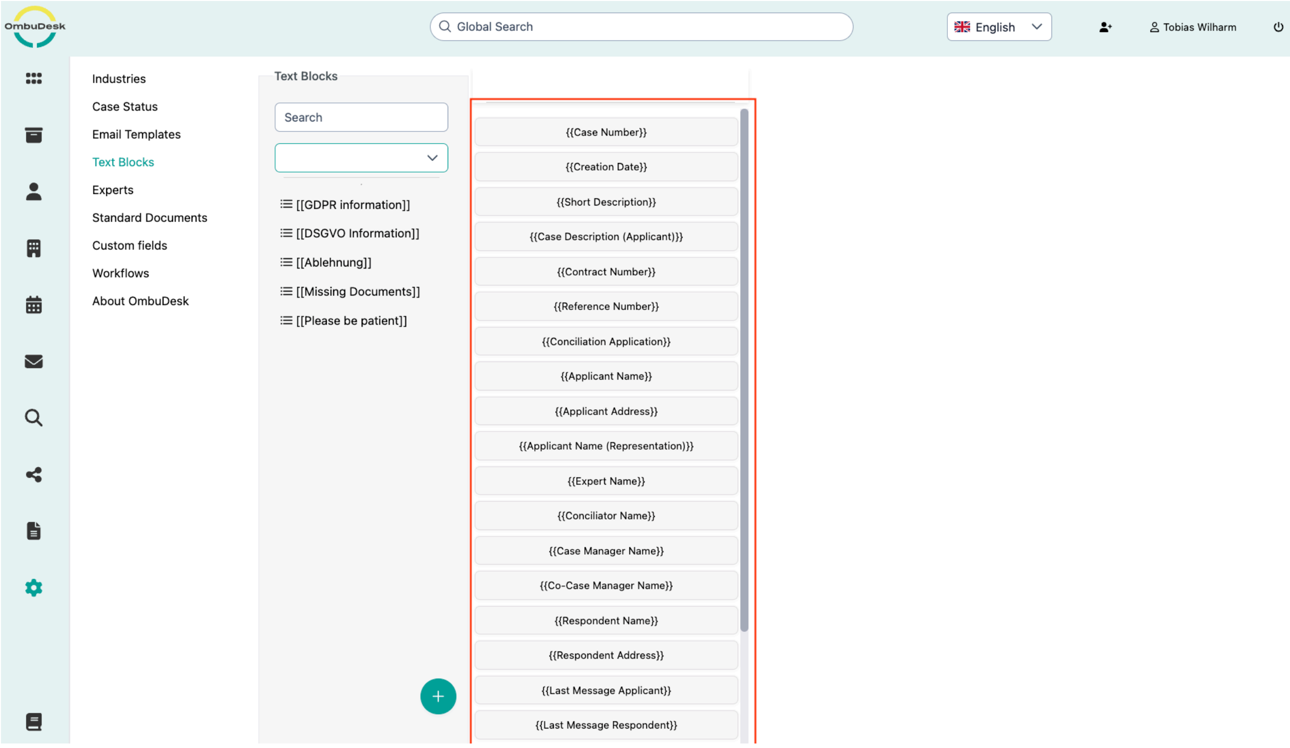
The text block can simply be placed into the text editor via **drag & drop** when writing a message. If you then **open the preview**, you will see how the text block is automatically replaced:





Placeholders

Placeholders are the smallest unit that you can use in e-mail templates and text blocks and when writing a message.



You **cannot customize** placeholders because they refer to static fields in a case or directly create a deadline / insert a message.

Why are the placeholders shown in the settings regardless?

You have access to the placeholders in the settings for e-mail templates and text blocks allowing you to use them to create templates.

Which placeholders are available for creating templates?

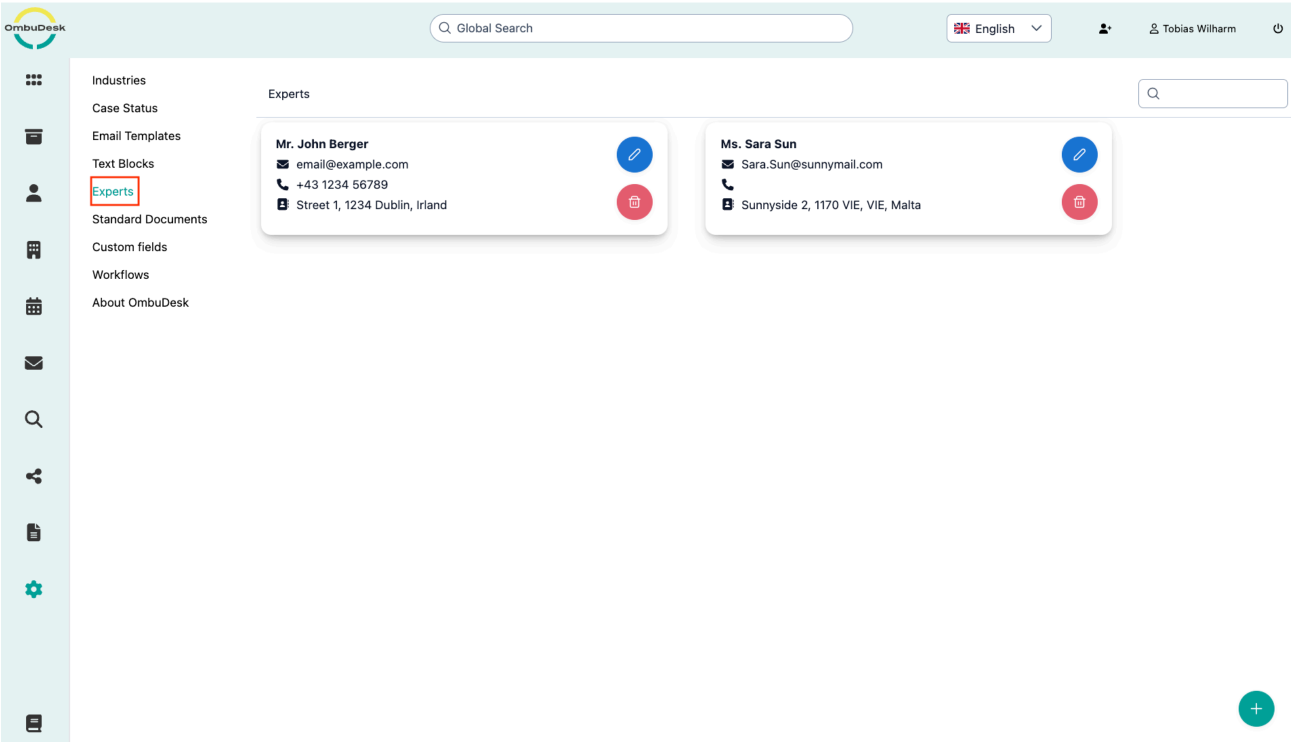
You can use the following placeholders to create templates in OmbuDesk:

- The **case number** is filled with the correct case number of the respective arbitration application.
- The **creation date** is filled with the day of creation of the respective arbitration application.
- The **short description** is replaced by the "short description" field under "Details" that you can fill in yourself.
- The **Case description (Complainant)** is replaced by the original case description of the complainant in the form.

- The **contract number** is replaced by the mentioned contract number in the application form.
- The **reference number** is replaced by the internal reference number that you can assign under "Details".
- The **Initial Application**: is replaced by the filled out application form of the complainant.
- All **names** (complainant, respondent, arbitrator, expert, representation, etc.) are replaced by the stored name in the arbitration application.
- The **address of the complainant and respondent** are replaced by the stored address in the arbitration application.
- The **last message** from the **complainant** and **respondent** inserts the last message of the named party.
- The **deadlines** (one, two, three, four) weeks are replaced by the due date at the time of sending. In addition, a **deadline** for the respective file is created in the background.

Experts

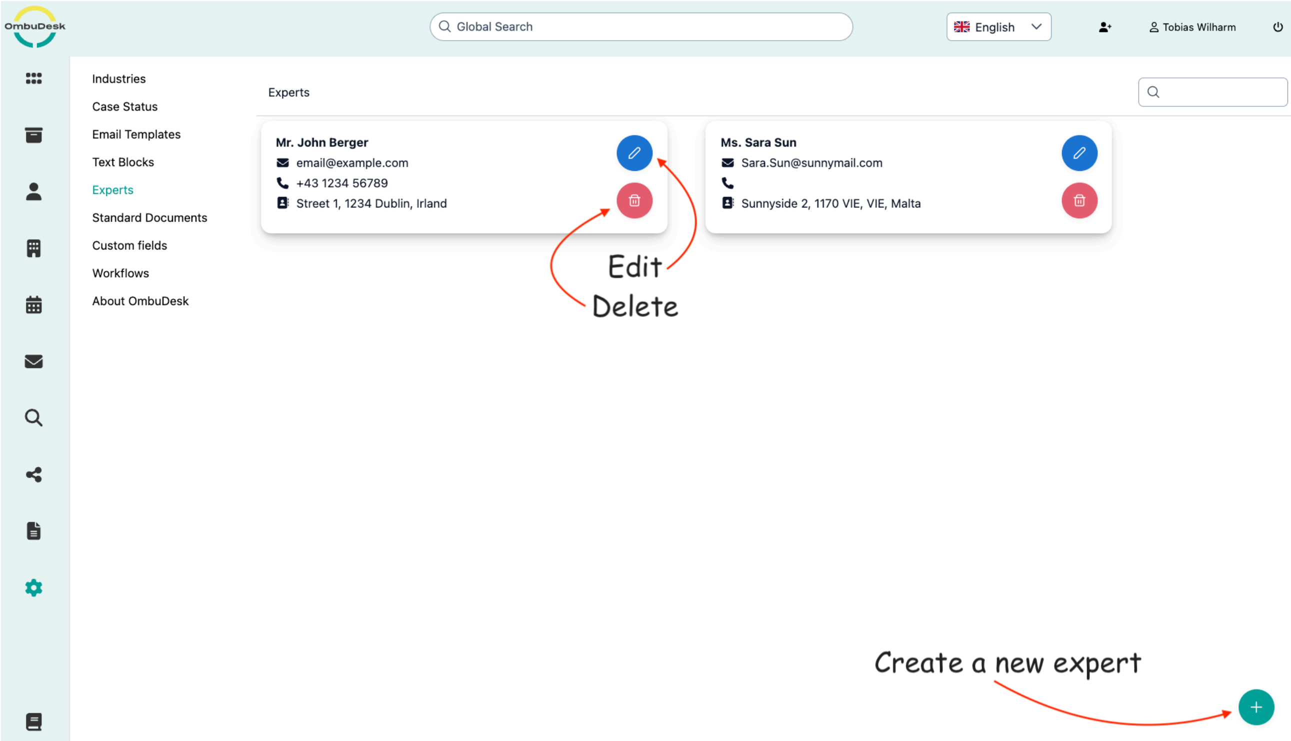
You can store experts in OmbuDesk if you work with external experts in your dispute resolution office.



What settings are available for experts?

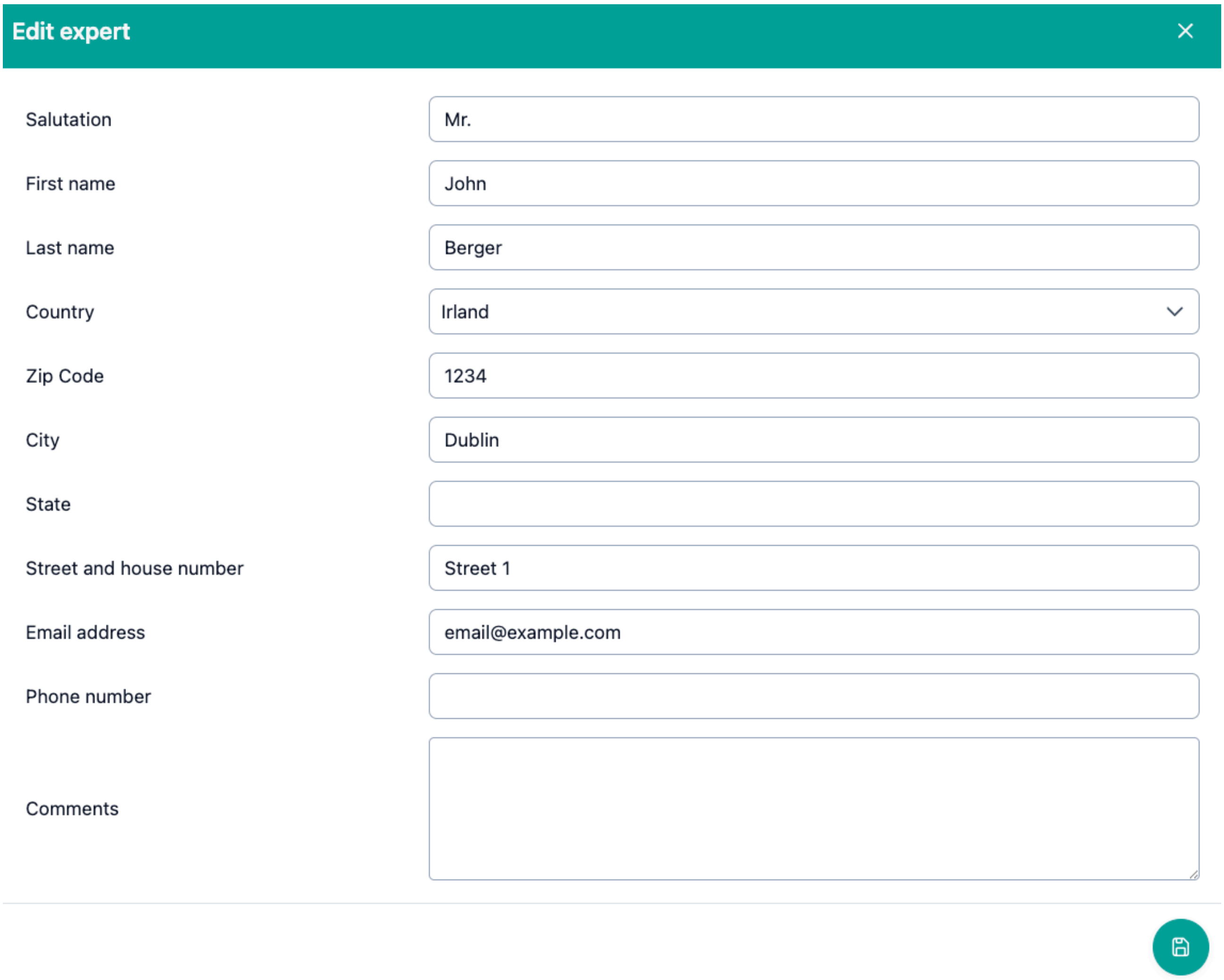
On the settings page for experts, you can perform three different actions:

1. **Create new expert**: You can add experts via the plus symbol at the bottom right edge.
2. **Edit existing experts**: You can edit existing experts via the blue pencil symbol.
3. **Delete experts**: You can delete existing experts via the red trash can symbol.



What information can you store for an expert?

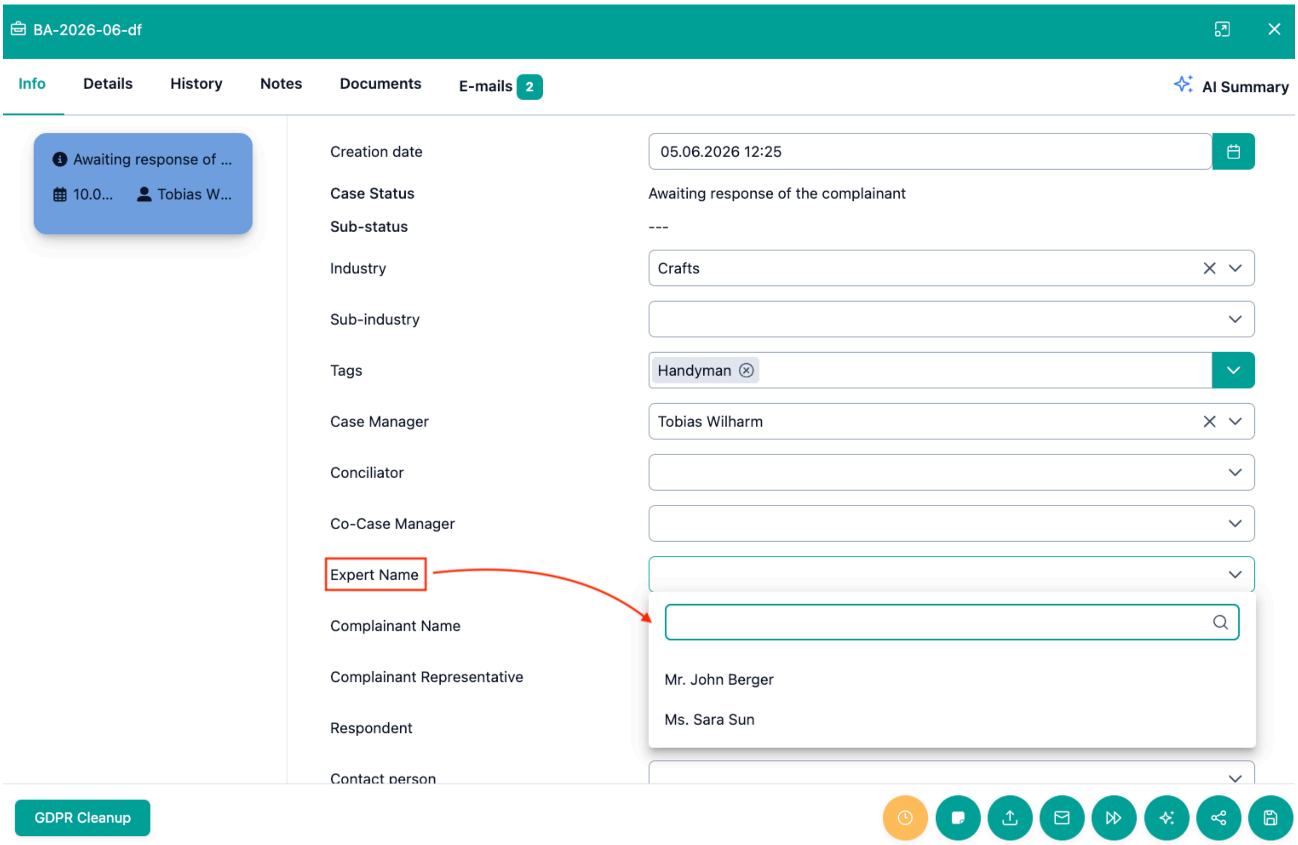
When you store a new expert, you will be asked for the master data of the expert in the dialog window. The window for editing this data looks the same:



Where can you assign an expert in a digital case file?

If you want to assign an expert to a case to **allow access for the external party**, you can simply do so under "Details".

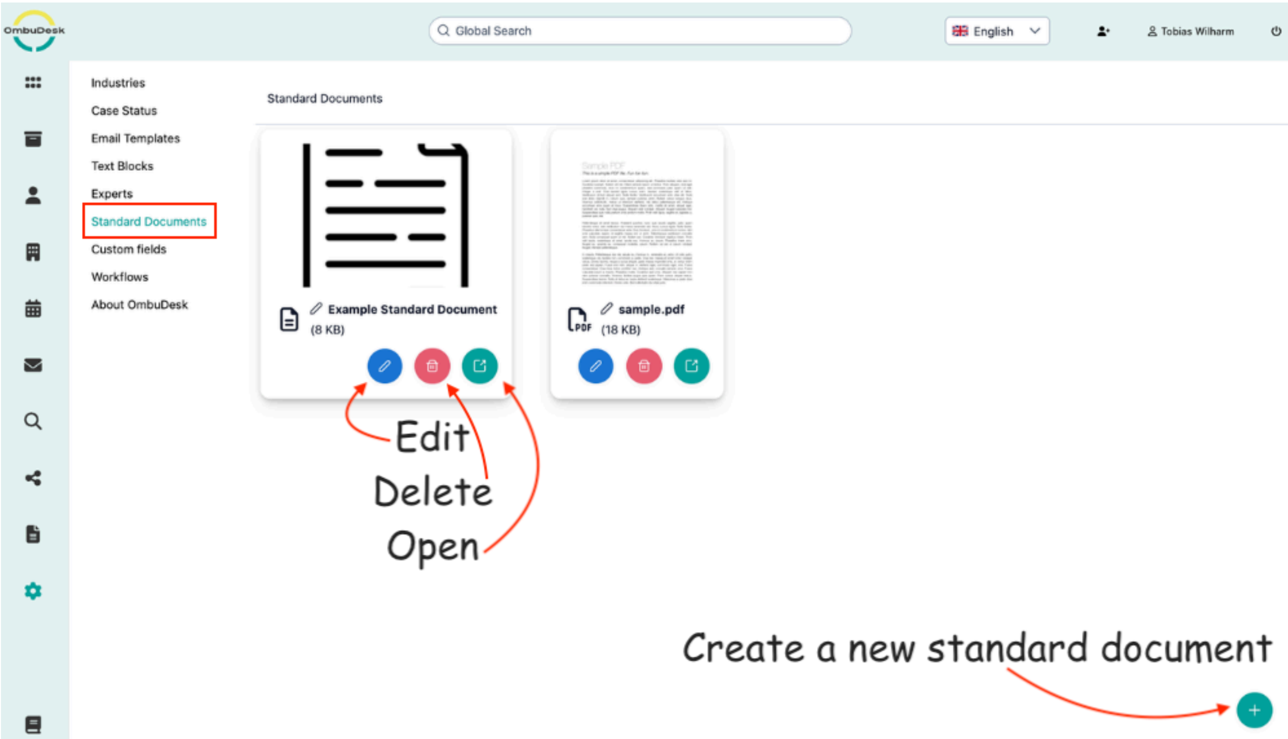
You can also see the option highlighted in this image:


BA-2026-06-df
Info
Details
History
Notes
Documents
E-mails 2
AI Summary
Awaiting response of ...
10.0...
Tobias W...
Creation date
05.06.2026 12:25
Case Status
Awaiting response of the complainant
Sub-status

Industry
Crafts
Sub-industry
Tags
Handyman
Case Manager
Tobias Wilharm
Conciliator
Co-Case Manager
Expert Name
Complainant Name
Complainant Representative
Respondent
Contact person
Mr. John Berger
Ms. Sara Sun
GDPR Cleanup

Standard Documents

OmbuDesk offers the possibility to store **standard documents** in the admin area.



What actions are available for standard documents?

1. **Add new document**: You can add a new document via the green plus symbol at the bottom right edge.
2. **Change document name**: You can rename a document via the pencil symbol next to the display name of documents.
3. **Delete / Open document**: You can delete a standard document via the red trash can symbol or open it via the green arrow.

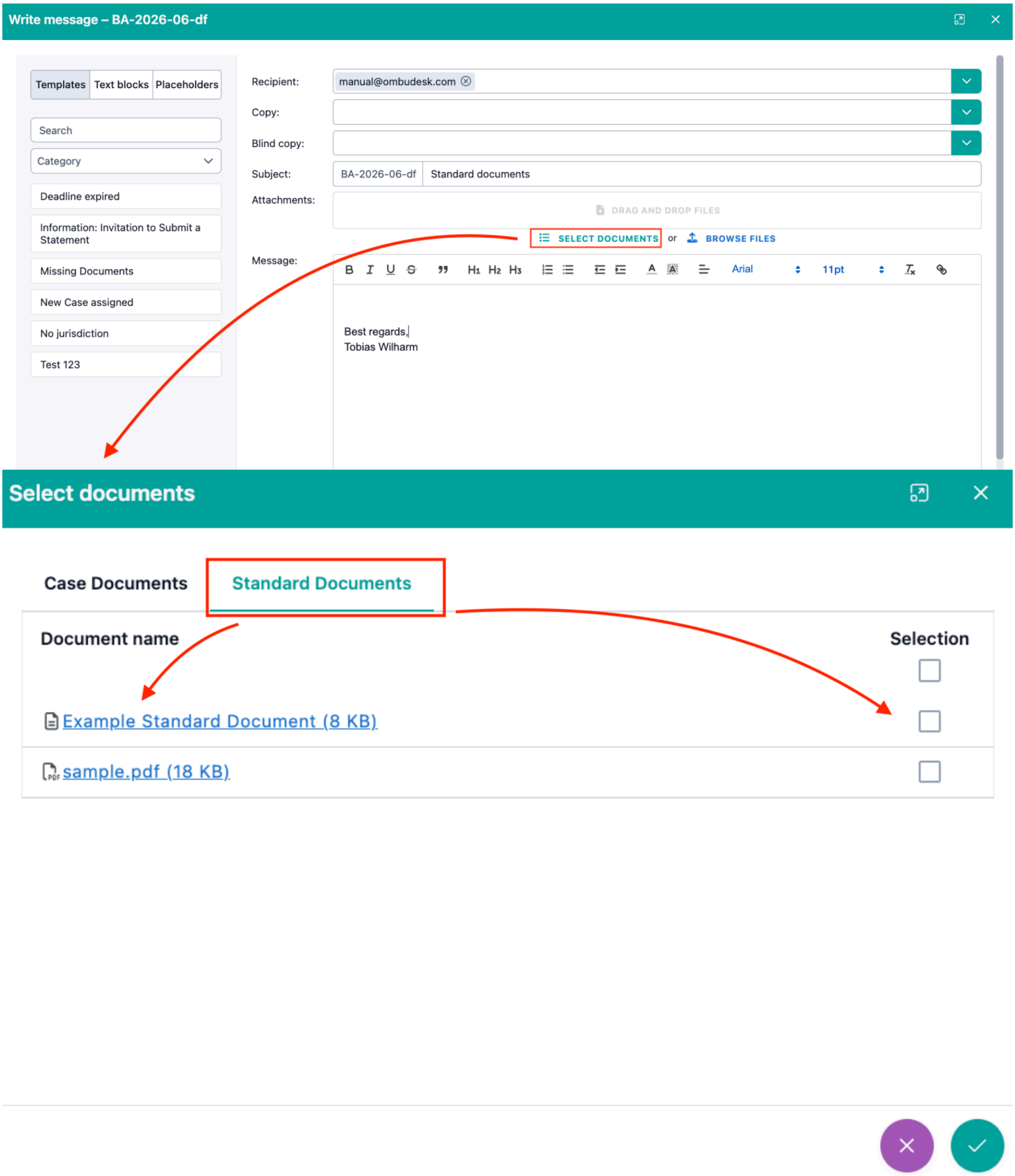
Where can you use standard documents?

When you write a message to one of your parties, you can easily add a standard document.

Follow these steps:

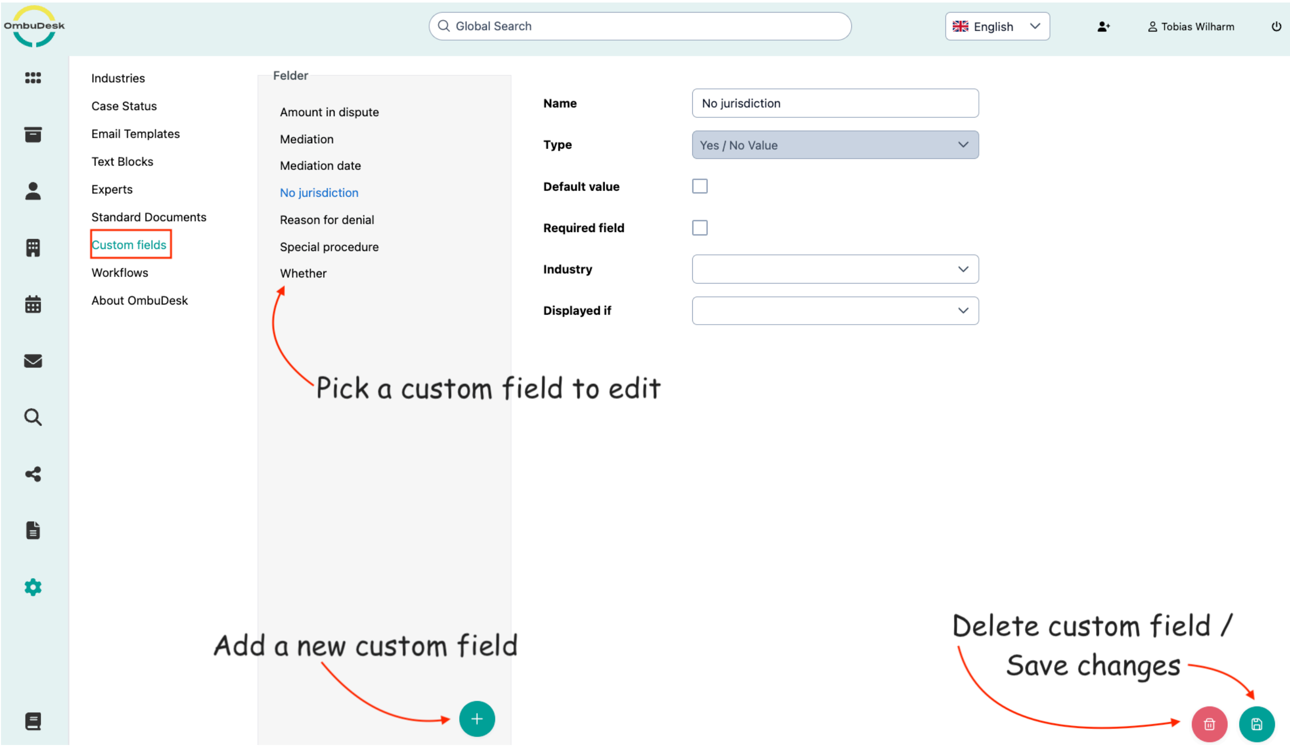
1. Open a digital case file.
2. Select the "Write message" quick action.
3. Click the "Add document" button.

4. Switch the view to standard documents.
5. Select the desired standard document to add it.



Custom Fields

OmbuDesk can be flexibly adapted to the specific needs of your dispute resolution office. In the **Custom Fields** settings, you can create additional data fields that are displayed in the **"Details"** tab of the digital case file.



How do you tailor the fields under "Details" to your preferences?

When you create a new field or change an existing field, you have the following options:

1. **Assign name**:

The name of the field as it is displayed to the user.

2. **Select field type**:

   - **Yes/No value**: Simple Yes/No selection.
   - **Text**: Free text field in the digital case file.
   - **Integer**: Numerical field that only allows whole numbers.
   - **Decimal number**: Numerical field that also allows decimal numbers.

- **Selection list:** List of selection options from which the user can choose.
- **Date**: Calendar field where a date can be selected.
- **Period**: Calendar field where a period can be selected.
- **Currency**: Numerical field predefined for the Euro.

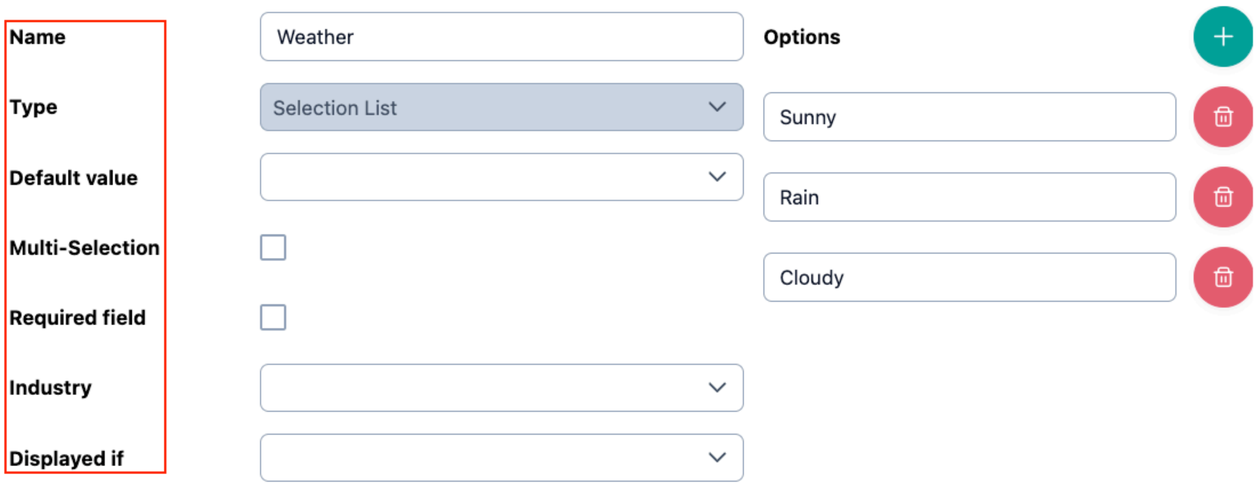
3. **Set visibility and default value**:

You can define the dependencies under which a field is displayed. This can depend, for example, on the **industry** or whether a **certain field** has been filled in before.

In addition, you can set a default value for fields – i.e., a value that is always automatically displayed at the beginning.

4. **Add selection options if necessary**

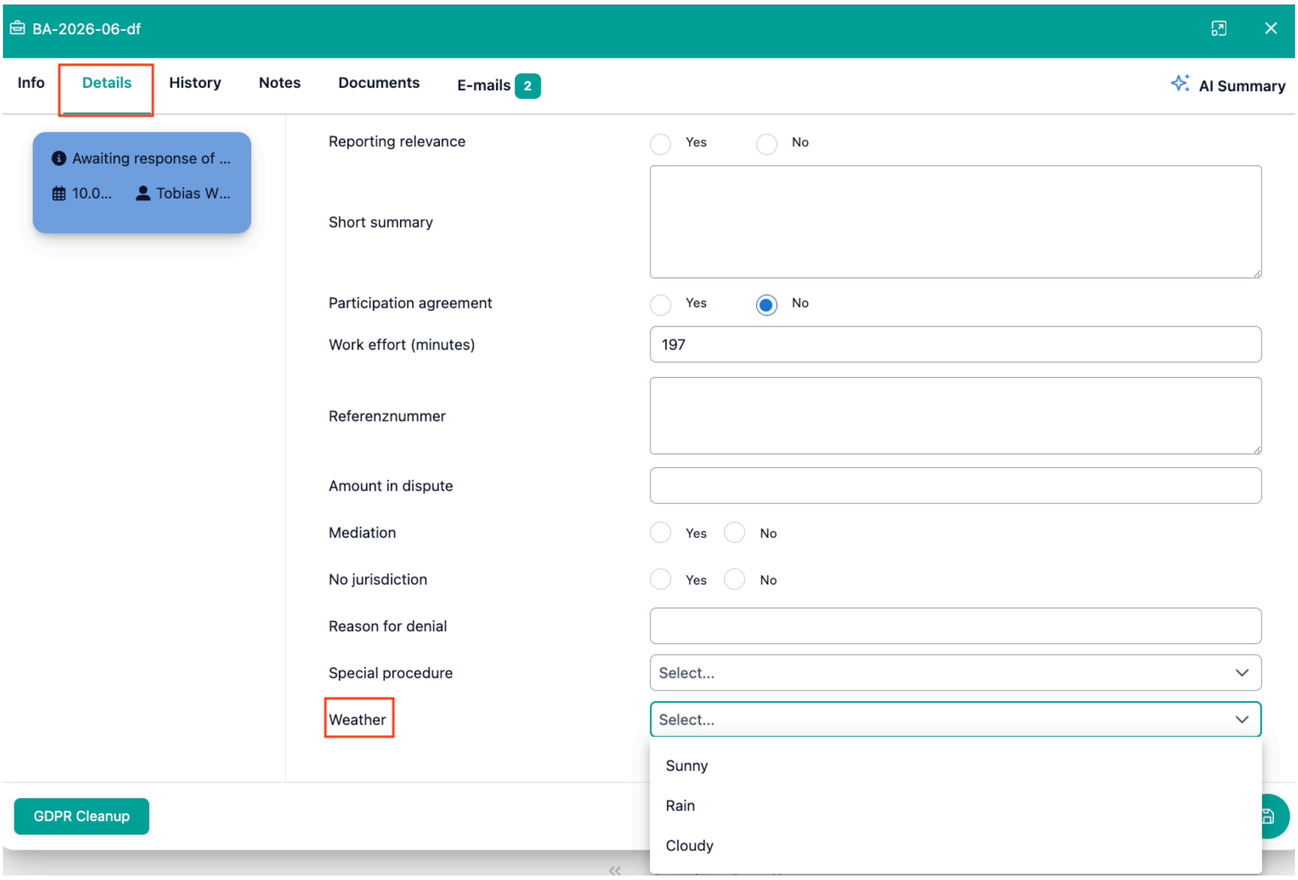
If you define a selection list, you can specify the options displayed via a free text field.



How are the custom fields displayed in the digital case file?

The custom fields are displayed in the order of the settings in the "Details" tab of your digital case file.

If you make and save changes, these will subsequently be made available in the digital case file:



Important note for administrators

Be careful when deleting custom fields. If you delete a field, all data that has already been entered in existing cases will also be removed.