



Stoneridge Portal

Step-by-Step Client Guide for Support

Welcome to the Stoneridge Portal

What's new?

We've redesigned the Stoneridge Portal to make it easier than ever to manage your account, get support, and access your services — all in one place.

Key Benefits:

- Self-service tools so you can make updates, payments, and purchases anytime
- A better Support experience with clearer communication and faster case resolution
- Secure payment options — including direct ACH payments in the portal

Quick Start: Where to Find What You Need

Click a task below to jump straight to the instructions.

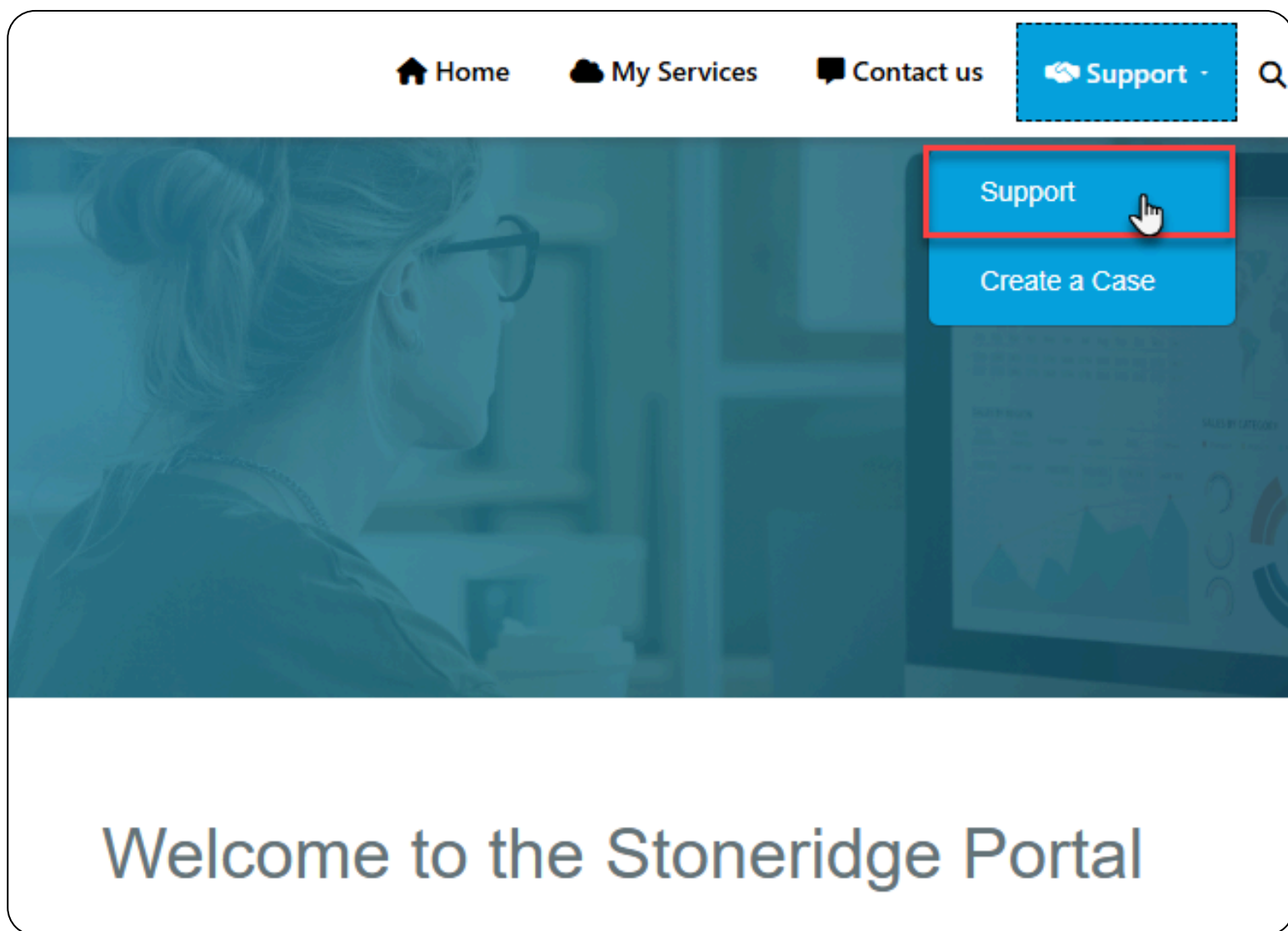
Category	Task
My Support	View all my support cases
	Create a new support case
	View open cases
	Edit an open case
	Cancel an open case
	View resolved cases

Support

View all my support cases

1

On the Stoneridge Portal home page, click **Support** in the top menu and choose **Support** from the drop-down list



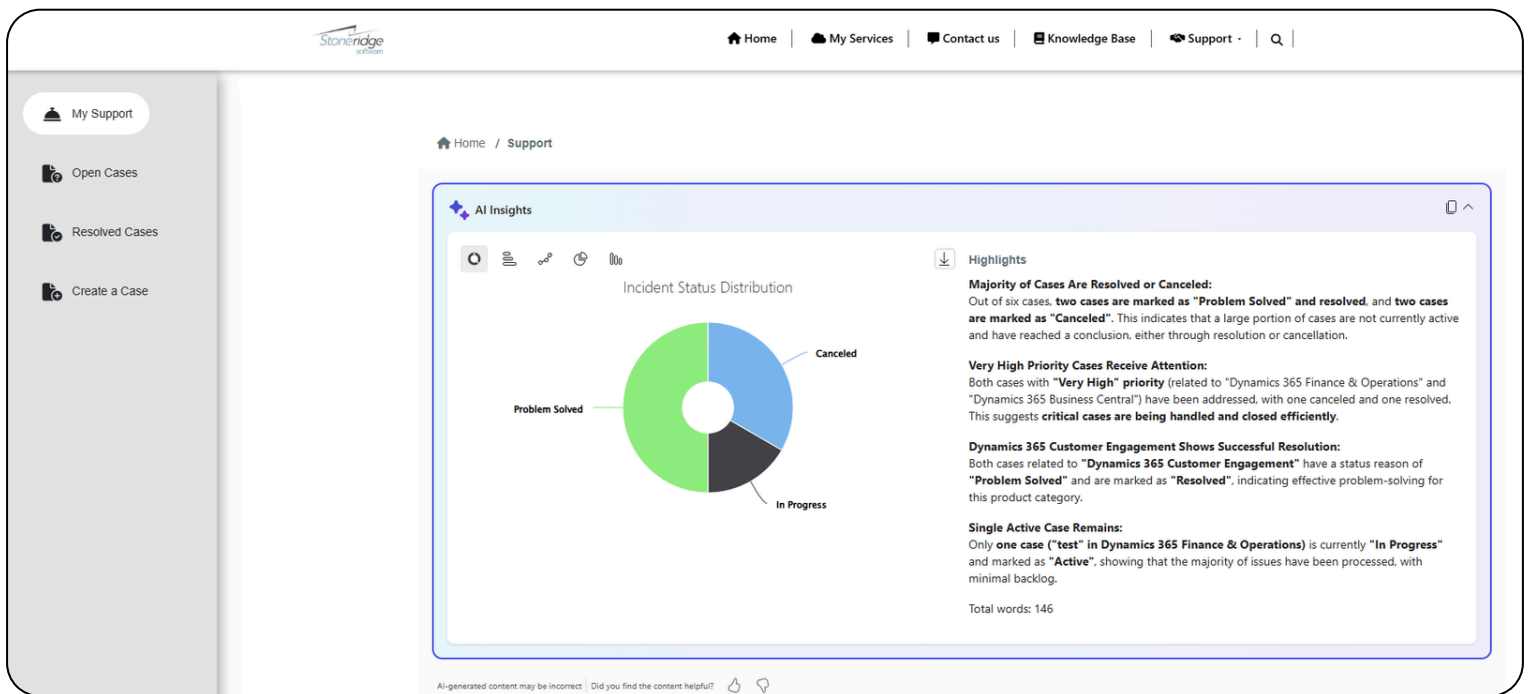
Support

View all my support cases

2

After selecting Support, you'll arrive at the **My Support** page. Here, you can:

- See your **AI Insights** dashboard
- View a **complete list of your support cases**
- Access **additional Support tools** from the menu on the left



The screenshot shows a table of support cases. A callout box points to the 'Download' button above the table, stating 'Download your case list as an Excel file anytime'. Another callout box points to the 'Status Reason' column header, stating 'Filter by case number, title, priority, category, or status'.

Case Number	Case Title	Priority	Product Category	Status Reason
CAS-001338-T4...	Test Case in SSI-TEST Portal	Normal	Cloud Services	Canceled
CAS-001339-L8...	Test - Unable to Post Vendor Invoice Du...	Very High	Dynamics 365 Finance & Op...	Canceled
CAS-001340-V1...	Test - Leads Not Converting to Opportu...	Normal	Dynamics 365 Customer Eng...	Problem Solve
CAS-001341-N...	Test - Bank Reconciliation Statement Not...	Very High	Dynamics 365 Business Cent...	Problem Solve
CAS-001342-Y5...	Test - Case Auto-Assignment Rules Not ...	Normal	Dynamics 365 Customer Eng...	Problem Solve
CAS-001343-K1...	test	Normal	Dynamics 365 Finance & Op...	In Progress

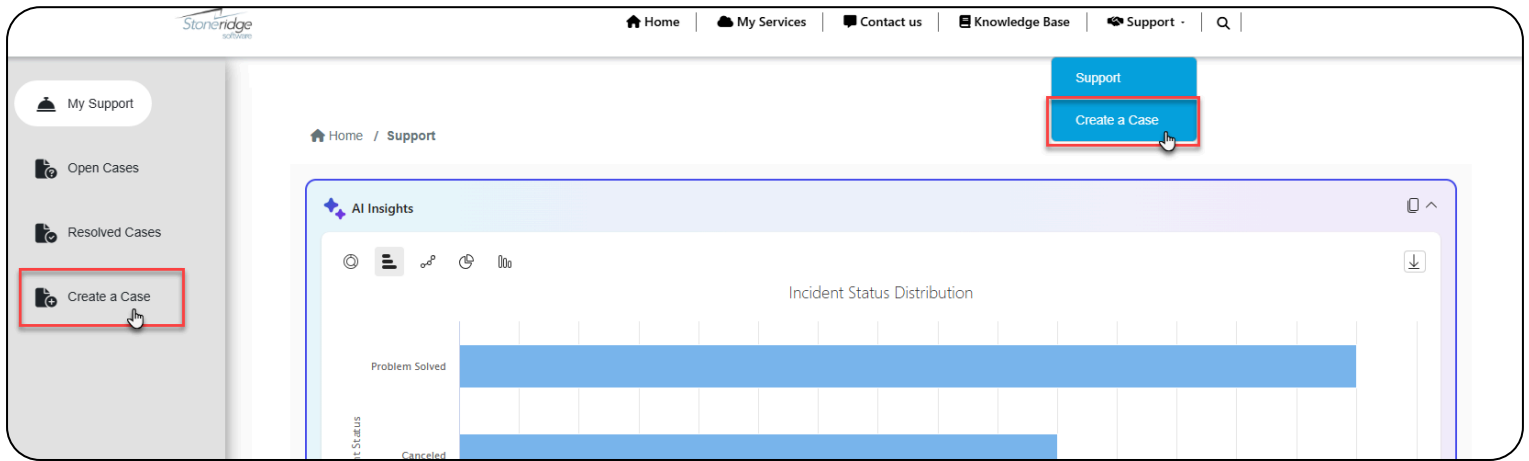


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Support

Create a new support case

- 1 Click **Create a Case** from the menu or **Support dropdown**



- 2 Fill in: **Title**, **Product Category** (choose from 7 options), **Priority** (Important or Critical), **External Case No.** (optional), and the **Detailed issue description**

Case Details

Title (Brief Description of Issue) *

Product Category *

Priority

Important - System functioning but some capability not working as expected

External Case No.

Optional - for your internal case tracking and reference.

Issue Description

Please provide as much detail as possible, including screenshots, error messages, context, and attempted troubleshooting steps



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Support

Create a new support case

- 3 Attach relevant **files** (up to 5, each up to 90MB) and click **Submit**

Attachment(s)

You can upload a maximum of 5 files, each up to 90MB.

↑ Upload

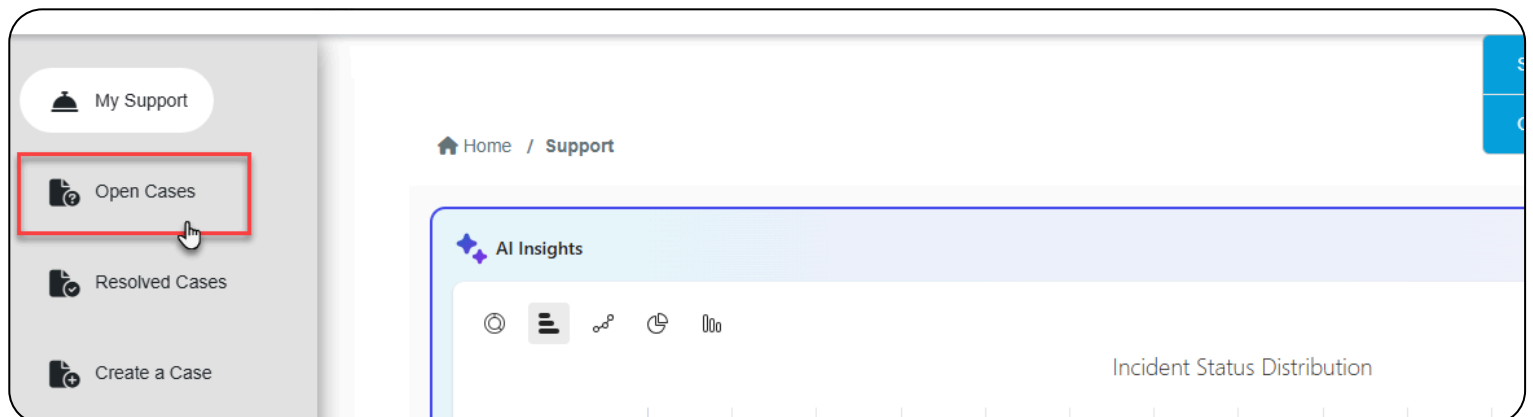
Submit



Best Practice: Include steps to reproduce the issue, screenshots, and business impact for faster resolution.

View open cases

- 1 Click **Open Cases** in the left-hand menu



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Support

View open cases

- 2 You'll see a list view with filters for **Case Number**, **Title**, **Status**, **Priority**, **Owner**, and **Created On**

Home / Support / My Open Cases

Download Open Cases

Case Number	Case Title	Status Reason	Priority	Owner	Created On ↓
CAS-001345-P5X8L5	Cannot Qualify Lead – "Business Process Error" in D365	In Progress	Normal	# Portals-Work 365 Dynamics Portal	8/12/2025
CAS-001343-K1H3V6	test	In Progress	Normal	# Portals-Work 365 Dynamics Portal	8/1/2025

This list can also be exported as an .xlsx file by selecting **Download Open Cases**

- 3 To view a case click on the specific **Case Number**, or select the **grey dropdown** on the case record and select **View Details**

Home / Support / My Open Cases

Download Open Cases

Case Number	Case Title	Status Reason	Priority	Owner	Created On ↓
CAS-001345-P5X8L5	Cannot Qualify Lead – "Business Process Error" in D365	In Progress	Normal	# Portals-Work 365 Dynamics Portal	8/12/2025
CAS-001343-K1H3V6	test	In Progress	Normal	# Portals-Work 365 Dynamics Portal	8/1/2025

View details



Support

View open cases



Quick Note: Feel free to use the case **Timeline**. At the bottom of any open case, use the **Timeline** to:

- Add a **comment** for the Stoneridge Support team
- Upload additional **files**
- View **past communication** and **case-related emails**

Case Details

Overview

Case Number

CAS-001345-P5X8L5

Case Title *

Cannot Qualify Lead – "Business Process Error" in D365

Issue *

When attempting to qualify a lead in Dynamics 365 Sales, I receive the following error message:

"Business Process Error: You do not have sufficient privileges to access the object."

This issue is preventing me from converting leads into opportunities, which is impacting our campaign follow-up process.

Status Reason

In Progress

Client Update

—

Additional details

Priority

Important - System functioning but some capability not working as expected

Product Category *

Dynamics 365 Customer Engagement

Request Type *

—

Contact Information

Customer *

Contoso SSI (Work 365)

Contact

Jack Roehrich

Case Owner

—

Case Contact Notifications

Full Name ↑

Leanne McGregor

E-mail

leanne.mcgregor@stoneridgesoftware.com

Request Details

Created On

8/12/2025

Comment

Hello,

I was able to grab a screenshot of the error message I'm seeing. It is attached to this comment.

Thanks!

Attach a file

Choose Files

No file chosen

Submit

Cancel

Comments from both you and your Case Owner will appear here, helping keep all updates in one place.

Timeline

Add comment



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Support

Edit an open case

- 1 From the case you are viewing, click **Edit Case**

[Home](#) / [Support](#) / [Case Details](#)

Edit Case

Cancel Case

Case Details

Overview

Case Number

CAS-001345-P5X8L5

Case Title *

Cannot Qualify Lead – "Business Process Error" in D365

Issue *

When attempting to qualify a lead in Dynamics 365 Sales, I receive the following error message:

"Business Process Error: You do not have sufficient privileges to access the object."

This issue is preventing me from converting leads into opportunities, which is impacting our campaign follow-up process.

Status Reason

In Progress

Client Update

—

Contact Information

Customer *

Contoso SSI (Work 365)

Contact

Jack Roehrich

Case Owner

—

Case Contact Notifications

Full Name ↑

Leanne McGregor

lea

Request Details

Created On



Support

Edit an open case

2 Update **Product Category** and **Priority**

Home / Support / Edit Case

Case Details

Title (Brief Description of Issue) *

Cannot Qualify Lead – "Business Process Error" in D365

Product Category *

Dynamics 365 Customer Engagement

Priority

Important - System functioning but some capability not working as expected

External Case No.

Optional field, helps track cases in your system and reference on cases

Case Owner

—

Issue Description

When attempting to qualify a lead in Dynamics 365 Sales, I receive the following

Case Contact Notifications

Add Contact Notifications

Full Name ↑ E-mail

There are no records to display.

 **Quick Tip:** You can select **Add Contact Notifications** to select other portal users from your organization to get updates on the case.

3 Click **Submit** at the bottom of the page once the updates have been made



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Support

Cancel an open case

- 1 From the case you are viewing, click **Cancel Case**

[Home](#) / [Support](#) / [Case Details](#)

[Edit Case](#) [Cancel Case](#)

Case Details

Overview

Case Number

CAS-001345-P5X8L5

Case Title *

Cannot Qualify Lead – “Business Process Error” in D365

Issue *

When attempting to qualify a lead in Dynamics 365 Sales, I receive the following error message:

“Business Process Error: You do not have sufficient privileges to access the object.”

This issue is preventing me from converting leads into opportunities, which is impacting our campaign follow-up process.

Status Reason

In Progress

Contact Information

Customer *

Contoso SSI (Work 365)

Contact

Jack Roehrich

Case Owner

—

Case Contact Notifications

Full Name ↑

Leanne McGregor

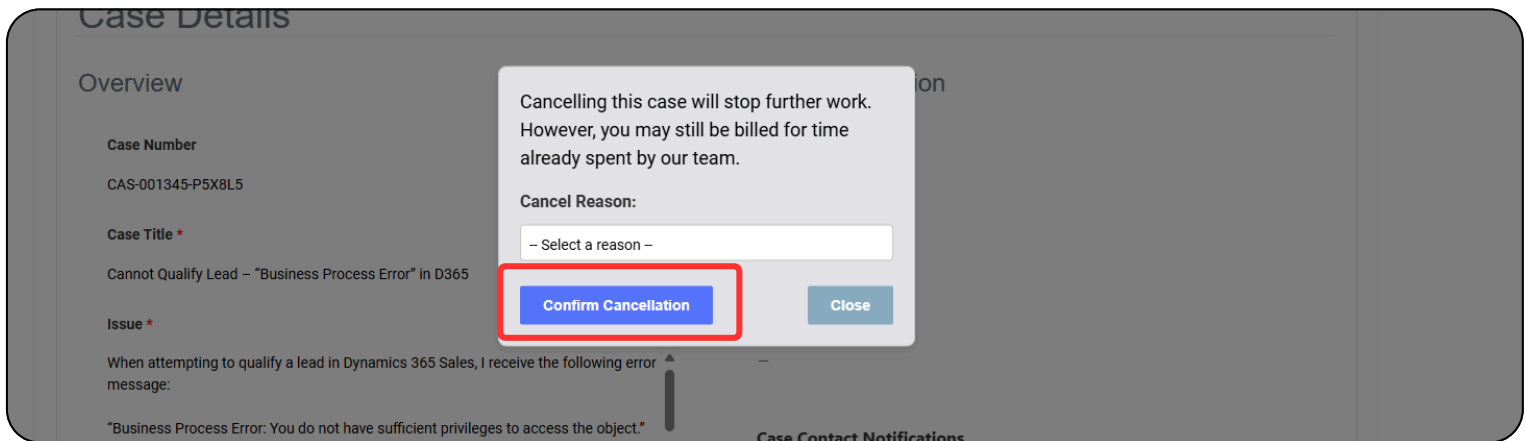


Support

Cancel an open case

2

Choose a cancellation reason (**Resolved on My Own, Issue No Longer Occurring, No Longer Need Assistance, and Duplicate Case**) and select **Confirm Cancellation**



The screenshot shows a 'Case Details' modal window. On the left, under the 'Overview' tab, the following information is visible:

- Case Number:** CAS-001345-P5X8L5
- Case Title ***: Cannot Qualify Lead – "Business Process Error" in D365
- Issue ***: When attempting to qualify a lead in Dynamics 365 Sales, I receive the following error message:
"Business Process Error: You do not have sufficient privileges to access the object."

In the center, a confirmation dialog is displayed with the following text:

Cancelling this case will stop further work. However, you may still be billed for time already spent by our team.

Cancel Reason:

– Select a reason –

At the bottom of the dialog, there are two buttons: **Confirm Cancellation** (highlighted with a red rectangle) and **Close**.



Quick Note: Clients may be billed for time already spent on the case.

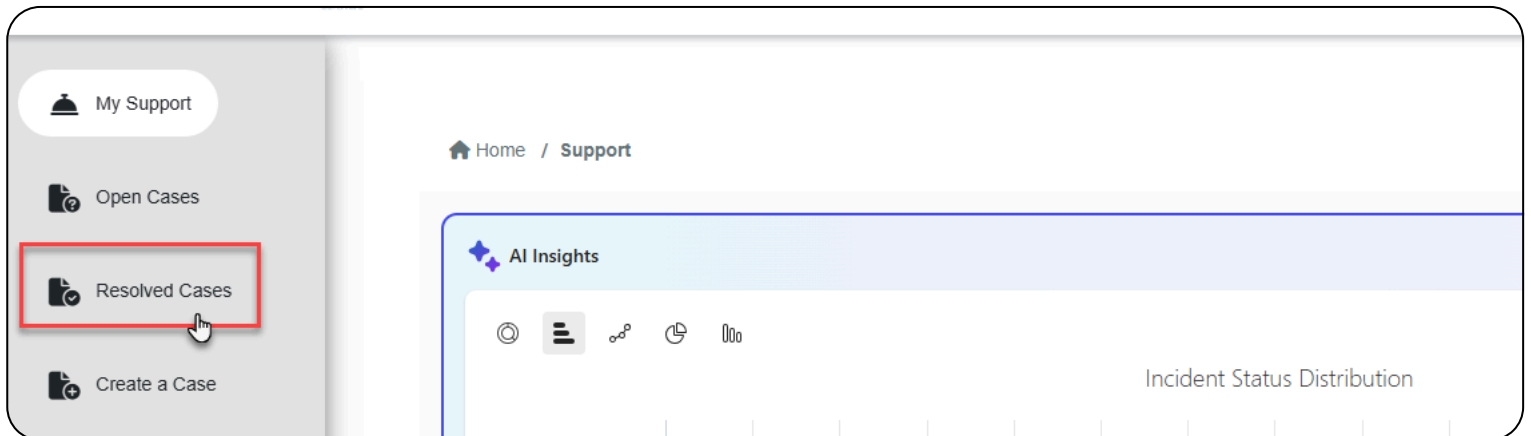


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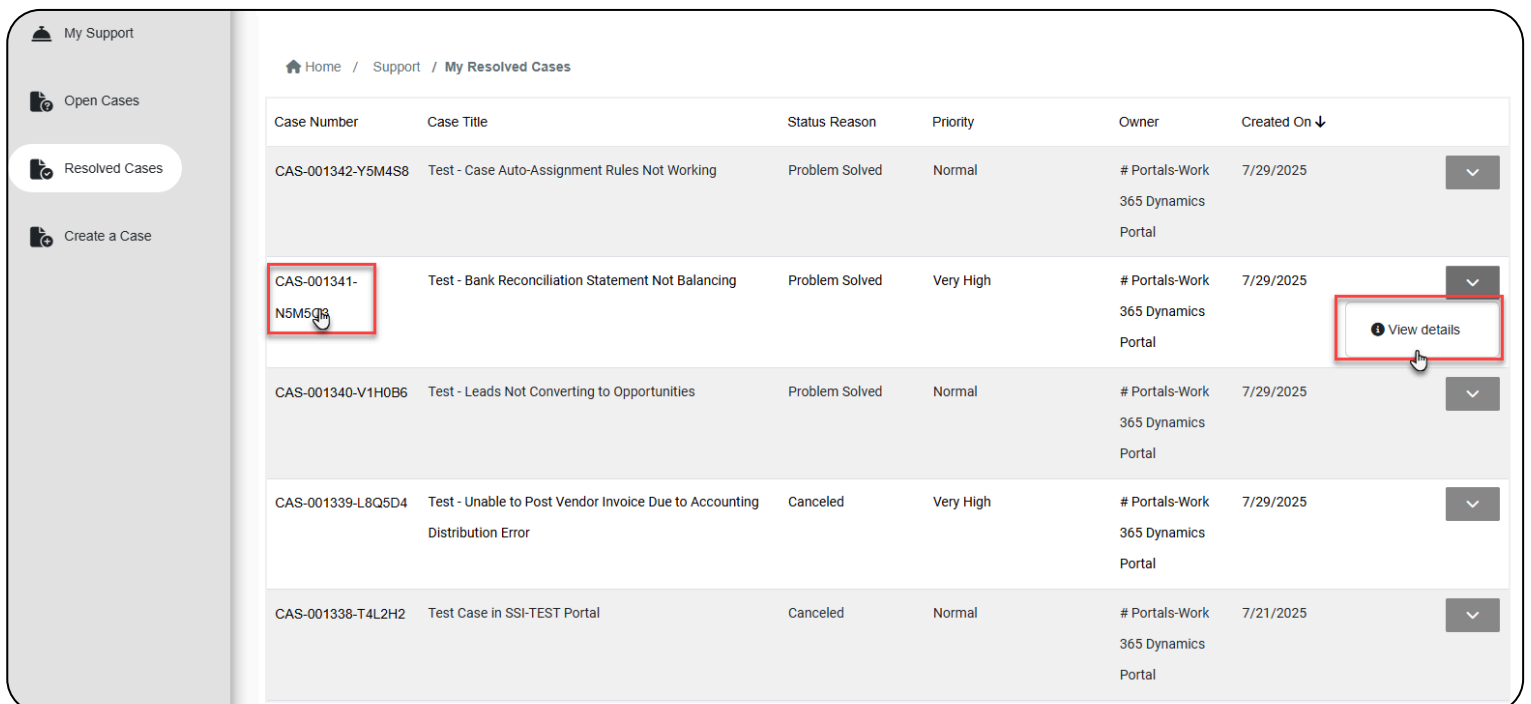
Support

View resolved cases

1 Select **Resolved Cases** from the left menu



2 You'll see a list of cases marked **Problem Solved** or **Canceled**. Click on the **Case Number** or **View details** to view the resolution summary



Support

View resolved cases

- 3 You'll see fields for **Cause** and **Resolution** — filled out by your **Case Owner** to explain what happened and **how it was resolved**

Case Number

CAS-001342-Y5M4S8

Case Title *

Test - Case Auto-Assignment Rules Not Working

Issue *

Cases created via the customer service portal are not being automatically assigned to the appropriate queue or agent based on the configured routing rules. All new cases are being assigned to the default queue instead

Steps to Reproduce:

Submit a case through the customer portal with the category "Technical Support."
Check the case record in Dynamics 365.

Status Reason

Problem Solved

Client Update

—

Customer *

Contoso SSI (Work 365)

Contact

Jack Roehrich

Request Details

Created On

7/29/2025

Cause

The issue was caused by a misconfiguration in the Routing Rule Set. Specifically:

- The routing rule set was not activated, so even though the rules were correctly defined, they were not being applied.
- Additionally, the condition for routing based on the "Category" field was referencing an outdated or incorrect field name due to a recent schema change.

Additional details

External Case No.

Azure DevOps Bug #47036

Priority

Important - System functioning but some capability not working as expected

Product Category *

Dynamics 365 Customer Engagement

Request Type *

Break\Fix

Note Text

Resolution

1. Verified Routing Rule Set Status:
 - Navigated to Customer Service Admin Center > Routing > Routing Rule Sets.
 - Found that the rule set was in Draft status and not activated.
2. Corrected the Condition Logic:
 - Edited the rule condition to reference the correct "Case Category" field.
 - Validated the logic to ensure it matched "Technical Support" cases to the "Tech Support" queue.
3. Activated the Routing Rule Set:
 - Saved and activated the rule set.
 - Tested by submitting a new case through the portal.
4. Confirmed Functionality:
 - Verified that the new case was correctly routed to the "Tech Support" queue.
 - Monitored for a few hours to ensure consistent behavior.

