

Case to Nonconformance (NC) Creation Solution

1. A customer requires that for any Case (salesforce standard object) created or updated with **Type** (Picklist) as **Problem**, a Nonconformance (SQX_Nonconformance__c) record is created automatically.

Solution Approach: -

- 1. Created **Problem** Picklist value in the Case Object for the field called “Type”

SETUP > OBJECT MANAGER
Case

Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Hierarchy Columns
Scoping Rules
Triggers

Case Field
Type
Back to Case Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Type
Data Type	Picklist
Help Text	
Description	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Picklist Values Used

Active picklist values	6 (1,000 max)
Inactive picklist values	0

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Case Type Picklist Values

Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	Problem	Problem	<input type="checkbox"/>	Assigned dynamically

- 2. Created a custom object called “Nonconformance” with Auto - numbering format: NC - <10 numbers> with the following fields as described:

SETUP > OBJECT MANAGER
Nonconformance

Details

Description

API Name
SQX_Nonconformance__c

Custom

✓

Singular Label
Nonconformance

Plural Label
Nonconformances

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

❖ Field Name 1: -**Priority**

- Field Type: - Picklist
- Field Values: - High, Medium, Low (Same as case object Priority field Values).

❖ Field Name 2: - **Title**

- Field Type: - Text
- Length: - 255

❖ Field Name 3: - **Description**

- Field Type: - Long Text Area
- Length:- 32000

❖ Field Name 4: - **QMS Reference Number**

- Field Type: - Text
- Length: - 255

2. A lookup field in Case must store the Nonconformance reference after the Nonconformance record has been created. Create a field NC Reference (API: SQX_NC_Reference__c) to lookup to nonconformance object.

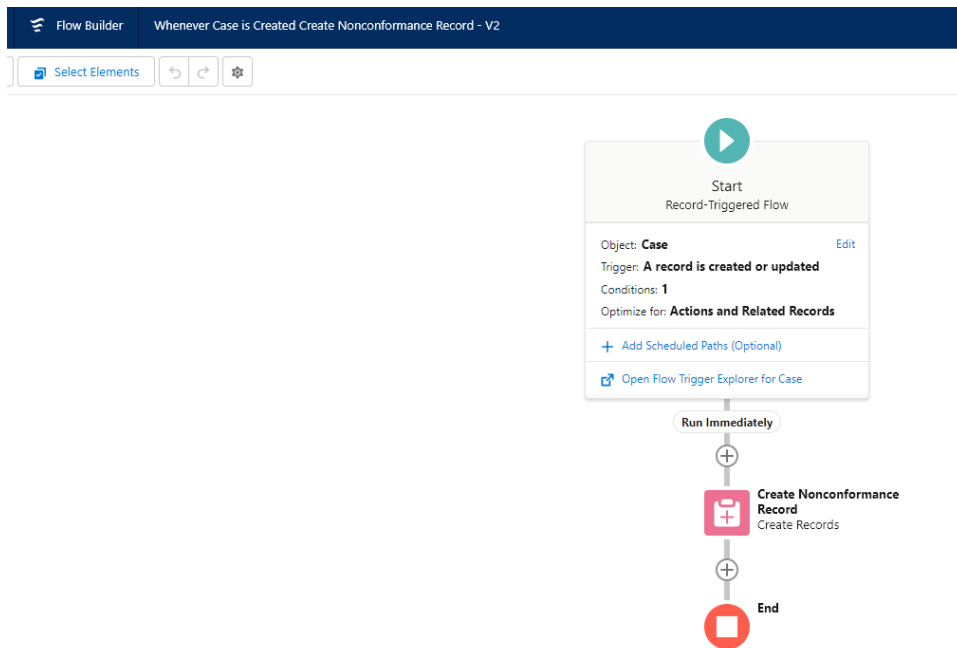
Solution Approach: -

Created a custom field called “**NC Reference**” on the Case object to lookup to the **nonconformance** object.

The screenshot shows the Salesforce Setup interface for defining a custom field on the Case object. The breadcrumb trail is: SETUP > OBJECT MANAGER > Case. The left sidebar shows navigation options: Details, Fields & Relationships (selected), Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main content area is titled 'Case Custom Field NC Reference' with a 'Back to Case Fields' link and a 'Validation Rules' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table contains the following data:

Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Object Name	Data Type
NC Reference	SQX_NC_Reference	SQX_NC_Reference__c							Case	Lookup

Automation (Flow) to create the **nonconformance** record whenever case is created or updated.



1. Entry Conditions: -

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Case

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated** to meet the condition requirements option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

Type

Operator

Equals

Value

Problem

+ Add Condition

When to Run the Flow for Updated Records ⓘ

☐ Every time a record is updated and meets the condition requirements

☒ Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.


Cancel Done

- Whenever **case** is **created** or **updated** and **Type** field value equals **Problem** then only automation will start.

2. Nonconformance Record creation with the field mappings as described.

Edit Create Records

Create Salesforce records using values from the flow.

Create Nonconformance Record (Create_Nonconformance_Record) 

How Many Records to Create

☒ One

☐ Multiple

How to Set the Record Fields

☐ Use all values from a record









☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Nonconformance

Set Field Values for the Nonconformance

Field	Value	
Description__c	←  \$Record > Description X	
Priority__c	←  \$Record > Priority X	
Title__c	←  \$Record > Subject X	
QMS_Reference_Number__c	←  \$Record > Case Number X	

[+ Add Field](#)

☐ Manually assign variables

Cancel
Done

3. If a Nonconformance has already been created against a case, do not create again.

- For blocking Nonconformance records duplication validation rule is used in the Nonconformance object.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Nonconformance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Nonconformance Validation Rule

[Back to Nonconformance](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Block_Duplicate_Nonconformance_Records	Active	✓
Error Condition Formula	QMS_Reference_Number__c = PRIORVALUE(QMS_Reference_Number__c)		
Error Message	Duplicate Nonconformance Record Found.	Error Location	Top of Page
Description			

4. Only the users with Case Admin permission set must be able to escalate a case to Nonconformance. Changes in case from other users should not create/update the nonconformance record.

- For allowing only Case Admin to escalate the cases to nonconformance, the Permission set is used to grant access only to the Case Admin users and validation is used to check whether the user who is escalating has the defined permission set assigned to him/her.

SETUP

Permission Sets

Permission Set

Case Admin Permission Set

[Find Settings...](#) [Clone](#) [Delete](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	API Name	Case_Admin_Permission_Set
License	Namespace Prefix	

SEARCH SETUP

Setup Home Object Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Case Validation Rule

[Back to Case Validation Rules](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Case_Admin_cant_escalate_Nonconformance	Active	✓
Error Condition Formula	NOT(\$Permission Case_Admin_Permission_Set)		
Error Message	Only Case Admin can escalate to Nonconformance	Error Location	Top of Page
Description			