**Case Management**

https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/salesforce\_case\_implementation\_guide.pdf

Key Benefits   
**Centralize**   
 The Cases tab is a central repository to use for tracking all customer support interactions.   
**Integrate**   
 Handle cases faster by integrating case information with existing knowledge bases or Salesforce Knowledge, a knowledge base designed to help solve cases.   
**Streamline**

Set up automatic case escalation and workflow tasks that enhance your business processes

To implement case management, set up various features, like fields, page layouts, email templates, and more.

**• Customizing Fields:** Create custom case fields to track information specific to your case management process.   
 - picklist value  
 - custom fields  
 - track field history  
 - case contact roles  
 - case hierarchy

- suggested solution (setup – support settings)

**• Customizing Case Page Layouts:** Design your case page layouts to add or remove fields, buttons, and related lists.

- visible fields  
 - editable fields  
 - required fields  
 - related list  
 - custom link

**• Creating Email Templates:** Edit standard templates or build your own distinctive email templates to send to customers who submit cases.   
 - for communication  
 - create case notification  
 - assignment  
 - comment  
 - web to case  
 - email to case  
 - close case

**• Define Assignment Rules:** Automatically route cases to the appropriate person or team.   
 - analyze routing

- case queue  
 - default case owner (Support Settings)  
 - case assignment rule

**• Setting Up Auto-Response Rules:** Prepare automated responses to your incoming cases based on any attribute of the case.   
 (только отправка писем)

**• Setting Case Escalation Rules:** Customize Salesforce to handle your case escalation process.   
 - planing (when)  
 - set Business Hours  
 - set Case Escalation Rule (*Only one escalation rule can be active at a time but an escalation rule can contain 3000 rule entries, including 300 formula rule entries* )

**• Capturing Cases from Your Website:** Design a form to post on your website that allows customers to submit cases.

-planing fields which we need to add to web form  
 -prepare web to case page  
 -enable web to case

**• Capturing Cases from Customer Emails:** Set up multiple customer support email addresses so incoming customer emails automatically generate cases.

**• Customizing the Case Sharing Model:** Select a sharing model that gives your users the access they need to cases.

**• Set Up Case Teams:** Set up case teams so that teams of users can work on cases together.

Case Contact Role – more than one contact can be assoc to case  
Case Hierarchies