

# SOLUTION ASSINGNMENT – 6

## Support Process and Cases Assignment

The screenshot shows a Salesforce Lightning Experience page for a Case record. The top navigation bar includes links for Mail, Start Course, Path Settings, Module 6 Assignment 1, and Web-to-Lead. The main header shows the Case tab is selected. The Case details are as follows:

Priority	Medium	Status	New	Case Number	00001026
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The status bar at the bottom indicates the case is currently "Working". A "Mark Status as Complete" button is visible. The left sidebar shows a "Feed" section with a "Post" titled "Poll" and a "Share" button. Below the feed is a "Most Recent Activity" section. The right sidebar displays "Details" for the case, including fields for Case Owner (Puja Kumari), Status (New), Case Number (00001026), Priority (Medium), Contact Name, Account Name, Type, Case Reason, Case Currency (INR - Indian Rupee), Contact Phone, Contact Email, and Case Origin (Phone). The bottom of the screen shows the Windows taskbar with various pinned apps and the system tray.

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Path Settings | Salesforce | Case Record Page - Lightning | Module 6 Assignment 1 | Web-to-Lead | Salesforce

## Path Settings

Complete processes fast by keeping users focused on what's most important. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.

- Which fields and content appear for your users at each step in the process.
- What good advice, reminders, links, and best practices to include at each step.
- How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.
- When paths are available to your users.

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Case Path	<input checked="" type="checkbox"/>	Case	--Master--	<a href="#">Delete</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

Remember user's Path preferences

18:11 26°C ENG 05-11-2024

Setup Home Service Setup Assistant Commerce Setup Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data > Email PLATFORM TOOLS > Subscription Management > Apps

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | 00001026 | Case | Salesforce | Module 6 Assignment 1 | Web-to-Lead | Salesforce

## Case

View All

Attachments (0)

Upload Files

Or drop files

Case History (1)

Date	Field	User	Original Value	New Value
05/11/2024, 5:46 pm	Created.	Puja Kumari		

View All

Case Currency: INR - Indian Rupee

Web Email: [redacted]

Web Name: [redacted]

Date/Time Opened: 05/11/2024, 5:46 pm

Date/Time Closed:

Product: Engineering Req Number

Potential Liability: SLA Violation

Created By: Puja Kumari, 05/11/2024, 5:46 pm

Last Modified By: Puja Kumari, 05/11/2024, 5:46 pm

Subject:

Description:

Internal Comments:

17:58 26°C ENG 05-11-2024

Type here to search

First WebPage

CSS session

127.0.0.1:5500/hello.html

Contact Name Puja  
 Email: 1902kumari@outlook.com  
 Phone: 8086681685  
 Subject: Related Product  
 Description: Interested in your product  
 Submit Query

Mail - PUJA KUMARI - Outlook | Start Course | Intellipaat | Case Assignment Rules | Salesforce | 00001014 | Case | Salesforce

26°C Partly cloudy 18:14 06-11-2024

Setup Home Object Manager

case

**Case Assignment Rules**

Automatically assign cases to users or queues based on criteria you define. You can create multiple rules, but only one rule can be active at a time.

Click a rule name to add or edit rule entries.

Action	Rule Name	Active	Created By	Created On
Rename   Del	Case Assignment Rule 1	✓	Puja Kumari	06/11/2024
Rename   Del	Standard	✗	Puja Kumari	24/10/2024

Help for this Page

Screenshot of the Salesforce Setup page showing the Case Assignment Rule configuration.

**Case Assignment Rule**  
**Case Assignment Rule 1**

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

**Rule Detail**

Rule Name	Criteria	Active
Case Assignment Rule 1	Case: Case Origin EQUALS Web	✓

**Rule Entries**

Action	Order	Criteria	Assign To	Email
Edit   Del	1	Case: Case Origin EQUALS Web	Sam Carl	<input type="checkbox"/>

**Setup** Home Object Manager

Search Setup

Feature Settings

- Service
  - Case Assignment Rules
  - Case Auto-Response Rules
  - Case Comment Triggers
  - Case Merge
- Case Teams
  - Case Team Roles
  - Predefined Case Teams
  - Contact Roles on Cases
  - Email-to-Case
  - Web-to-Case
  - Web-to-Case HTML Generator
- Environments
  - Monitoring
  - Case Escalations
- Offline

Type here to search

26°C Mostly clear 18:35 06-11-2024

Screenshot of the Salesforce Lightning Experience Case detail page for Case Number 00001028.

**Case**

Priority: Medium, Status: New, Case Number: 00001028

**Feed**

New Working Escalated Closed

Share an update... Share

Most Recent Activity ▾

Search this feed...

All Updates Call Logs Text Posts Status Changes

**Details**

Case Owner	Sam Carl	Status	New
Case Number	00001028	Priority	Medium
Contact Name		Contact Phone	
Account Name		Contact Email	
Type		Case Origin	Web
Case Reason		Case Status	Open

To Do List

Type here to search

26°C Mostly clear 18:43 06-11-2024

The screenshot shows the Salesforce Setup interface with the following details:

- Tab Bar:** Mail - PUJA KUMARI - Outlook, Start Course | Intellipaat, Escalation Rules | Salesforce, 00001028 | Case | Salesforce.
- Left Sidebar:** Feature Settings (Service: Escalation Rules), Environments (Monitoring: Case Escalations).
- Search Bar:** Search Setup, Q escalation.
- Page Header:** SETUP Escalation Rules.
- Section:** Rule Entry Edit, Case Escalation Rule.
- Form:** Enter the rule entry (Rule Name: Case Escalation Rule, Order: 1, Rule Criteria: Case: Case Origin EQUALS Web, Business Hours Settings: Use business hours specified on the case, How escalation times are set: When case is created).
- Section:** Escalation Actions (New).
- Help:** Help for this Page.
- Bottom Bar:** Type here to search, Windows taskbar with various icons, 24°C Mostly clear, 18:58, 06-11-2024.

The screenshot shows the Salesforce Setup interface with the following details:

- Tab Bar:** Mail - PUJA KUMARI - Outlook, Start Course | Intellipaat, Escalation Rules | Salesforce, 00001028 | Case | Salesforce.
- Left Sidebar:** Quick Find, Setup Home, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Subscription Management, Apps).
- Search Bar:** Search Setup, Q Quick Find.
- Page Header:** SETUP Escalation Rules.
- Section:** Rule Entry Edit, Case Escalation Rule.
- Form:** Enter the rule entry (Rule Name: Case Escalation Rule, Order: 1, Rule Criteria: Case: Case Origin EQUALS Web, Business Hours Settings: Use business hours specified on the case, How escalation times are set: When case is created).
- Section:** Escalation Actions (Action: Escalate At, Value: 30 Hours and 0 Minutes, Assign To: Sam Card, Email: checked, Notify: checked, Template:).
- Help:** Escalation Actions Help.
- Bottom Bar:** Type here to search, Windows taskbar with various icons, 24°C Mostly clear, 19:00, 06-11-2024.

Screenshot of the Salesforce Setup interface showing Support Settings.

The left sidebar shows a search bar with "support" and navigation links for Feature Settings, Service, Support Processes, and Support Settings.

The main content area is titled "Support Settings" and describes the defaults and email templates used by automated support features.

Configuration details:

Setting	Value	Description
Default Case Owner	Puja Kumari	The default owner of a case when assignment rules fail to locate an owner.
Notify Default Case Owner	<input checked="" type="checkbox"/>	The user listed in the Case History related list for automated case changes from: <ul style="list-style-type: none"><li>Assignment rules</li><li>Escalation rules</li><li>On-Demand Email-to-Case</li><li>Cases logged in the Self-Service portal</li></ul>
Automated Case User	Puja Kumari	The user listed in the Case History related list for automated case changes from: <ul style="list-style-type: none"><li>Assignment rules</li><li>Escalation rules</li><li>On-Demand Email-to-Case</li><li>Cases logged in the Self-Service portal</li></ul>
Case Creation Template	<a href="#">Support_Case Created (Phone Inquiries)</a>	Use this template to notify contacts that a case has been created or updated for them.
Case Assigned Template	<a href="#">Support_Case Assignment Notification</a>	Use this template to notify your users a case has been assigned to them.
Case Close Template	-- None --	Use this template to notify contacts that a case has been closed.
Customer Feedback Survey	-- None --	Use this survey to gather feedback after a case is closed. You must have Surveys enabled and also have a default community configured.

Bottom status bar: Type here to search, Windows Start button, Taskbar icons, Weather (24°C Partly cloudy), Date (06-11-2024), Time (19:18).

Screenshot of the Salesforce Setup interface showing Support Settings.

The left sidebar shows a search bar with "support" and navigation links for Feature Settings, Service, Support Processes, and Support Settings.

The main content area is titled "Support Settings" and describes various settings for case ownership and feed items.

Configuration details:

Setting	Value	Description
Notify Case Owners when Case Ownership Changes	<input type="checkbox"/>	Use this setting to automatically select the Send Notification Email checkbox on cases when users change a case owner to another user.
Show Closed Statuses in Case Status Field	<input type="checkbox"/>	Use this setting to include closed case statuses in the Case Status field on case edit pages. This lets users quickly close cases without clicking the Close Case button and updating information on the close case page layouts.
Hide Save & Close Button and CIs Links	<input type="checkbox"/> <a href="#">i</a>	Use this setting to turn on Case Feed-specific actions and feed items. When you select this option, existing cases are upgraded to the Case Feed user interface.
Enable Case Feed Actions and Feed Items	<input checked="" type="checkbox"/>	The character limit of the email feed item body. Select a value in the dropdown list (Small = 400, Medium = 1200, Large = 5000), or select Custom and enter a value between 400 and 5000.
Size of Email Feed Item Body	400 characters	The character limit of the email feed item body. Select a value in the dropdown list (Small = 400, Medium = 1200, Large = 5000), or select Custom and enter a value between 400 and 5000.
Blank Lines in Email Feed Item Body	Show blank lines	Remove blank lines in the body of email feed items to save space in Case Feed.
Collapse Previous Emails in Email Feed Item Body (Salesforce Classic Console Apps)	<input checked="" type="checkbox"/>	In Salesforce Classic console apps, show only the most recent email in the email feed item body. Users can un-collapse the feed to see previous emails in the thread.
Enable Default Email Templates or the Default Handler for Email Action	<input type="checkbox"/>	Use this setting to select an Apex class to load a default template or to specify the default target fields for the email action.

Bottom status bar: Type here to search, Windows Start button, Taskbar icons, Weather (24°C Partly cloudy), Date (06-11-2024), Time (19:18).

The screenshot shows the 'Support Settings' page in the Salesforce Setup. The search bar at the top contains 'support'. The main content area is titled 'Support Settings' and includes several configuration options:

- Size of Email Feed Item Body**: Set to 400 characters. Description: The character limit of the email feed item body. Select a value in the dropdown list (Small = 400, Medium = 1200, Large = 5000), or select Custom and enter a value between 400 and 5000.
- Blank Lines in Email Feed Item Body**: Set to 'Show blank lines'. Description: Remove blank lines in the body of email feed items to save space in Case Feed.
- Collapse Previous Emails in Email Feed Item Body (Salesforce Classic Console Apps)**: Checked. Description: In Salesforce Classic console apps, show only the most recent email in the email feed item body. Users can uncollapse the feed to see previous emails in the thread.
- Enable Default Email Templates or the Default Handler for Email Action**: Unchecked. Description: Use this setting to select an Apex class to load a default template or to specify the default target fields for the email action.
- Enable Question-to-Case in Salesforce**: Unchecked. Description: Let moderators create cases from Chatter questions in your organization.
- Create Auto-Response Record After Customer's First Email**: Unchecked. Description: By default, the auto-response email message record appears before the customer's first email. Select this option to create record after the customer's first email.
- Show Email Attachments in Case Attachments Related List**: Checked. Description: By default, email attachments aren't displayed in the case Attachments related list. Select this option to display an email icon in the case Attachments related list if the file was attached from an email. Also displays a Source column in the case Attachments related list's list view. This feature is available in Lightning Experience only.
- Enable Unread/Read on Compact Case Feed**: Unchecked. Description: When this setting is enabled, the title of unread feed items is bold. This feature is available in Lightning Experience only.

At the bottom right of the page is an 'Edit' button.

The screenshot shows the 'New Solution' page in the Salesforce classic interface. The top navigation bar includes links for Business Brands, Web Store Inventory Sources, Contribute, Shipping Carriers, List Emails, Service Territories, Catalogs, Custom Libraries, Documents, Promotion Segments, and Dashboards.

**Solution Detail**

Solution Number	00000011	<a href="#">Edit</a> <a href="#">Delete</a>
Public	<input type="checkbox"/>	
Status	Draft	
Visible in Public Knowledge Base	<input type="checkbox"/>	
Created By	Puja Kumari, 06/11/2024, 7:44 pm	Last Modified By Puja Kumari, 06/11/2024, 7:48 pm
Solution Title	New Solution	
Solution Details		

**Attachments**

No records to display.

**Cases**

No records to display.

**Solution History**

Date	User	Action
06/11/2024, 7:44 pm	Puja Kumari	Created.

[^ Back To Top](#) Always show me [more](#) records per related list

Salesforce screenshot showing a Case Detail page for Case Number 00001014.

**Case Detail:**

Case Owner	Puja Kumari [Change]	Status	Closed
Case Number	00001014	Priority	High
Contact Name	John Bond	Contact Phone	(312) 596-1000
Account Name	Grand Hotels & Resorts Ltd	Contact Email	bond_john@grandhotels.com
Type	Other	Case Origin	Phone
Case Reason	Installation	Date/Time Opened	24/10/2024, 1:48 pm
Product	GC3020	Date/Time Closed	07/09/2023, 12:29 am
Potential Liability	Yes	Engineering Req Number	
Created By	Puja Kumari, 24/10/2024, 1:48 pm	SLA Violation	No
Subject	Delay in installation; spare parts unavailable	Last Modified By	Puja Kumari, 24/10/2024, 1:48 pm
Description			
Custom Links	Up-sell / Cross-sell Opportunity		

**Solutions:**

No Solutions Attached

**Open Activities:**

Type here to search 24°C Partly cloudy 19:54 06-11-2024

Salesforce screenshot showing the Suggested Solutions page for Case 00001014.

**Suggested Solutions for Case 00001014:**

Case Owner	Puja Kumari	Contact Name	John Bond
Status	Closed	Email	bond_john@grandhotels.com
Case Number	00001014	Phone	(312) 596-1000
Subject	Delay in installation; spare parts unavailable		

The following Solutions were found using a formula that scores the relevancy of each solution to the case.

**Relevant Reviewed Solutions [1]:**

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
Select	GenWatt Installation Services	100%	Reviewed	PKuma	0	24/10/2024, 1:48 pm

**Relevant Unreviewed Solutions [1]:**

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
Select	Electrical wiring installation for GC5060	80%	Draft	PKuma	0	24/10/2024, 1:48 pm

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Salesforce Home

Internal Zone: Popular Ideas

00001028 | Case | Salesforce

Business Brands Web Store Inventory Sources Contribute Data Mask Policies Shipping Carriers List Emails Service Territories Catalogs Custom Libraries Documents Promotion Segments

Create New... Ideas Popular Ideas

Recent Items

- Idea for Business Improvement
- 00001014
- New Solution
- 00001028
- 00001026
- Betty Bair
- Product Information
- Vikram Gugla
- GC Product Webinar - Jan 7, 2002
- Product 1

Zone Internal Zone (Internal Only)

Post Ideas → Vote for Ideas → Add Comments

Popular Ideas Recent Ideas Top All-Time Comments Post Idea Category: All

Your idea has been posted.

Idea for Business Improvement promoted 10 Points 0 Comments Posted by puja on 06/11/2024, 8:04 pm

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Type here to search 24°C Mostly cloudy 20:04 06-11-2024

Mail - PUJA KUMAR Start Course | Intellipaat Experience Build Workspaces - Intellipaat Settings | Salesfo (38) WhatsApp Can't find 'comm' Enable Digital Experience

Home Publishing...

We're publishing your changes now. You'll receive an email confirmation when your changes are live.

Got It

Tab 1 Tab 2 Tab 3

23°C Mostly cloudy 21:06 06-11-2024

A screenshot of a Salesforce Experience Builder page. The header shows multiple browser tabs, including 'Mail - PUJA KUM', 'Start Course | Int...', 'Experience Build...', 'Workspaces - Int...', 'Settings | Salesfo...', '(38) WhatsApp', 'Can't find 'com...', 'Enable Digital Ex...', and others. The main content area has a dark background with a central image of a coffee cup surrounded by coffee beans. In the top left corner, there's a logo for 'CAPRICORN' with 'est. 2015' and 'Coffee' below it. A large white text 'What can we help you with?' is centered over the image. Below this is a search bar with the placeholder 'Search the help center...' and a magnifying glass icon. At the bottom, there are three tabs labeled 'Tab 1', 'Tab 2', and 'Tab 3', with 'Tab 3' being the active one. The footer includes the text 'powered by salesforce' and a standard Windows taskbar with icons for File Explorer, Control Panel, Task View, Start, and other system functions.

A screenshot of a Salesforce Experience Builder page titled "Contact Support". The header features a logo for "CAPRICORN est. 2015" and a search bar. The main content area has a dark background with white text. It includes sections for "Contact Customer Support" (with a "Tell us how we can help." input field containing "Puja Kumari"), "Need Answers Fast?" (with a "Find what you need here." input field), and a "Description" section (containing "There is issue in some product need solution ASAP."). A "Submit" button is at the bottom. The bottom navigation bar shows the URL as "intellipat-3a-dev-ed.builder.salesforce-experience.com/sfsites/picasso/core/config/commeditor.jsp".

Mail - PUJA KUMARI | Start Course | Intellipaat | Experience Builder | Recently Viewed | Case | (39) WhatsApp | Can't find 'community' | Enable Digital Experience

intellipat-3a-dev-ed.develop.builder.salesforce-experience.com/sfsites/picasso/core/config/commeditor.jsp

Contact Support Back to Builder

CAPRICORN

Case "00001030" was created.

Your case was created.  
We'll get back to you soon.

Case summary

Subject: Query related Product  
Description: There is issue in some product need solution ASAP.  
Case Number: 00001030

Need Answers Fast?  
Find what you need here.

Search...

powered by salesforce

23°C Mostly cloudy 21:12 ENG 06-11-2024

Mail - PUJA KUMARI | Start Course | Intellipaat | Experience Builder | All Open Cases | Case | (39) WhatsApp | Can't find 'community' | Enable Digital Experience

intellipat-3a-dev-ed.develop.lightning.force.com/lightning/o/Case/list?filterName=AllOpenCases

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Cases More

Cases All Open Cases

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner A...
1	00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC5060	New	Low	24/10/2024, 1:48 pm	PKuma
2	00001016	Edna Frank	Maintenance guidelines for generator unclear	New	Low	24/10/2024, 1:48 pm	PKuma
3	00001024	Lauren Boyle	Design issue with mechanical rotor	New	Low	24/10/2024, 1:48 pm	PKuma
4	00001026			New	Medium	05/11/2024, 5:46 pm	PKuma
5	00001027		Physics	New		06/11/2024, 6:12 pm	PKuma
6	00001028			New	Medium	06/11/2024, 6:42 pm	scarl
7	00001029	Puja Kumari	Product Information	New	Medium	06/11/2024, 9:10 pm	PKuma
8	00001030	Puja Kumari	Query related Product	New	Medium	06/11/2024, 9:12 pm	PKuma

To Do List

23°C Mostly cloudy 21:14 ENG 06-11-2024