The **Case Management System** is mainly useful for **customer support teams**, but it can also benefit **Salesforce Admins and small business owners** in different ways.

**📌 Who Needs a Case Management System?**

1️⃣ **For Salesforce Admins** (Like You):

* Helps manage **customer complaints, issues, or service requests** inside Salesforce.
* Automates case assignments, escalations, and resolutions.
* Creates reports & dashboards to track case resolution performance.
* Improves overall **customer service efficiency**.

2️⃣ **For Small Business Owners**:

* Useful for tracking **customer inquiries, refund requests, or technical issues**.
* Helps a small team **stay organized and respond quickly** to customer problems.
* Can integrate with **email & web forms** to capture cases automatically.

📢 **Bottom Line**: Even if you're a Salesforce Admin, knowing **Case Management** is valuable because many companies use Salesforce **Service Cloud** to handle customer support. Also, small businesses can benefit by offering **better customer service** using this system.

This project will help you learn how to **track customer support cases, automate case resolutions, and manage case lifecycles** in Salesforce.

**🔹 Step 1: Create a New Custom App in Salesforce**

**1️⃣ Log in to Salesforce**

* Go to **Setup** (⚙️ icon in the top right corner).
* In the **Quick Find Box**, type **App Manager**.
* Click **"App Manager"**.

**2️⃣ Create a New Lightning App**

* Click **"New Lightning App"** (top-right button).
* Name the app **Case Management System**.
* Set the **App Branding** (optional, you can skip this for now).
* Click **Next**.

**3️⃣ Assign Navigation Items**

* Select **Standard Navigation** (default).
* Add these **Objects to Navigation**:
  + **Cases**
  + **Accounts**
  + **Contacts**
  + **Reports**
* Click **Next** → **Save & Finish**.

**📌 Step 2: Add Custom Fields to the Case Object**

We will add important fields to track case details properly.

**1️⃣ Open Object Manager**

* Go to **Setup** (⚙️) → **Object Manager**.
* Search for **Case** and click on it.

**2️⃣ Add Custom Fields**

We will add the following fields:

| **Field Label** | **Data Type** | **Description** |
| --- | --- | --- |
| **Case Priority** | Picklist | Priority level of the case (High, Medium, Low) |
| **Case Category** | Picklist | Type of issue (Billing, Technical, General) |
| **Resolution Notes** | Long Text | Final resolution details of the case |
| **Follow-up Date** | Date | The next follow-up date for the case |

**Steps to Add a Field:**

1. Click **Fields & Relationships** (left sidebar).
2. Click **New** (top right).
3. Select the **Data Type** (as per the table above) → Click **Next**.
4. Enter the **Field Label** and other required values.
5. Click **Next** → Set field-level security (keep default) → Click **Next**.
6. Add to the **Case Page Layout** → Click **Save**.

**📌 Step 3: Assign the Case Page Layout to Users**

Since you are both the **Salesforce Admin** and the **Sales Rep (End-User)**, we need to ensure that the correct page layout is assigned to the right users.

**🔹 1️⃣ Open Page Layout Assignment**

1. Go to **Setup** (⚙️) → **Object Manager**.
2. Search for **Case** and click on it.
3. Click **Page Layout Assignment** (top-right).

**🔹 2️⃣ Edit the Assignment**

1. Click **"Edit Assignment"** (top-right).
2. Find the **Sales Rep Profile** (or whichever profile your end-user belongs to).
3. Select the **Case (Support) Layout** from the dropdown.
4. Click **Save**.

**🔹 3️⃣ Verify the Assignment**

1. Log in as a **Sales Rep (or switch to a user with the assigned profile)**.
2. Open a **Case Record**.
3. Check if the **Case Management Layout section** appears.

**📌 Step 4: Create Case Record Types**

**Record Types** help classify cases into different categories, making it easier for Sales Reps (End-Users) to handle different scenarios.

**🔹 1️⃣ Open the Case Object**

1. Go to **Setup** → **Object Manager**.
2. Search for **Case** and click on it.
3. Click **Record Types** (left sidebar).

**🔹 2️⃣ Create a New Record Type**

1. Click **New** (top-right).
2. Enter the following details:
   * **Record Type Label:**
     + **Support Case** (for customer support issues)
     + **Sales Case** (for sales-related issues, if needed)
   * **Record Type Name:** Auto-fills based on the label.
   * **Description:** Add a brief explanation (e.g., "Used for handling customer support issues").
   * **Active:** ✅ (Check this box)
   * **Enable for Profiles:**
     + Select **Sales Rep, Support Agent** (or relevant profiles).
   * **Select Page Layout:**
     + Choose **Case (Support) Layout** for Support Cases.
     + Choose **Case Layout** for general cases.
3. Click **Next** → **Save**.

**🔹 3️⃣ Verify Record Type**

1. Go to **App Launcher (🔍)** → Search **Cases**.
2. Click **New Case**.
3. You should now see a **Record Type selection page**.
4. Choose a record type and verify that the correct page layout appears.

**📌 Step 4A: Create Support Processes**

A **Support Process** defines the **status values** that will be available for different types of cases.

**🔹 1️⃣ Open the Case Object**

1. Go to **Setup** → **Object Manager**.
2. Search for **Case** and click on it.

**🔹 2️⃣ Create a New Support Process**

1. Click **Support Processes** (left sidebar).
2. Click **New** (top-right).
3. Enter the following details:
   * **Process Name:**
     + **Support Case Process** (for handling customer support cases)
     + **Sales Case Process** (if cases are used for sales-related issues)
   * **Description:**
     + (Example: "Support case process for handling customer inquiries and issues.")
   * **Select Case Status Values:**
     + Choose relevant statuses like:  
       ✅ New  
       ✅ In Progress  
       ✅ Escalated  
       ✅ Resolved  
       ✅ Closed
4. Click **Save**.

**📌 Step 5: Create Case Record Types**

Now that we have **Support Processes**, we can create **Record Types** to categorize cases properly.

**🔹 1️⃣ Open the Case Object**

1. Go to **Setup** → **Object Manager**.
2. Search for **Case** and click on it.
3. Click **Record Types** (left sidebar).

**🔹 2️⃣ Create a New Record Type**

1. Click **New** (top-right).
2. Enter the following details:

**Record Type 1: Support Case**

* **Record Type Label:** Support Case
* **Record Type Name:** Auto-fills based on the label.
* **Description:** Used for handling customer support issues.
* **Select Support Process:** Support Case Process
* **Enable for Profiles:**
  + Select **Sales Rep, Support Agent** (or relevant profiles).
* **Select Page Layout:**
  + Choose **Case (Support) Layout**.

1. Click **Next** → **Save**.

**🔹 3️⃣ (Optional) Create Another Record Type for Sales Cases**

1. Repeat **Step 2**, but use:
   * **Record Type Label:** Sales Case
   * **Select Support Process:** Sales Case Process
   * **Select Page Layout:** Case Layout

**🔹 4️⃣ Verify Record Type**

1. Go to **App Launcher (🔍)** → Search **Cases**.
2. Click **New Case**.
3. You should now see a **Record Type selection page**.
4. Choose a record type and verify that the correct page layout appears.

**📌 Step 6: Automate Case Assignments Using Assignment Rules**

Now, we’ll create **Case Assignment Rules** to automatically assign cases to the correct users or queues based on certain conditions.

**🔹 1️⃣ Open Case Assignment Rules**

1. Go to **Setup** → In the **Quick Find Box**, search for **Case Assignment Rules**.
2. Click **Case Assignment Rules**.
3. Click **New** (top-right).
4. Enter the following details:
   * **Rule Name:** Support Case Assignment
   * **Active:** ✅ (Check this box)
5. Click **Save**.

**🔹 2️⃣ Create Assignment Rule Entries**

1. Click on the newly created **Support Case Assignment Rule**.
2. Click **New Rule Entry**.
3. Fill in the following details:

**Rule Entry 1: Assign Technical Issues to Support Team**

* **Sort Order:** 1
* **Criteria:**
  + Field: Support Type
  + Operator: equals
  + Value: Technical Issue
* **Select User or Queue:**
  + Assign to: **Support Queue** (or a specific Support Agent)
* Click **Save & New** (to add more rules).

**Rule Entry 2: Assign Billing Issues to Finance Team**

* **Sort Order:** 2
* **Criteria:**
  + Field: Support Type
  + Operator: equals
  + Value: Billing Issue
* **Assign to:** **Finance Queue** (or a specific Finance Rep)
* Click **Save & New**.

**Rule Entry 3: Assign General Inquiries to Sales Rep**

* **Sort Order:** 3
* **Criteria:**
  + Field: Support Type
  + Operator: equals
  + Value: General Inquiry
* **Assign to:** **Sales Rep (End-User)**
* Click **Save**.

**🔹 3️⃣ Activate the Assignment Rule**

1. Go back to the **Case Assignment Rules** page.
2. Click the **dropdown** next to the rule and select **Activate**.

**🔹 4️⃣ Test the Assignment Rule**

1. Go to **App Launcher (🔍)** → Search **Cases**.
2. Click **New Case**.
3. Select a **Record Type** (e.g., Support Case).
4. Choose a **Support Type** (e.g., Technical Issue).
5. Click **Save**.
6. Check if the case is automatically assigned to the correct user or queue.

**📌 Step 7: Create Case Escalation Rules**

Escalation rules ensure that **unresolved high-priority cases** are automatically escalated to a manager or another team after a certain time.

**🔹 1️⃣ Open Case Escalation Rules**

1. Go to **Setup** → In the **Quick Find Box**, search for **"Escalation Rules"**.
2. Click **Escalation Rules**.
3. Click **New** (top-right).
4. Enter:
   * **Rule Name:** High Priority Case Escalation
   * **Active:** ✅ (Check this box)
5. Click **Save**.

**🔹 2️⃣ Create an Escalation Rule Entry**

1. Click on the newly created **High Priority Case Escalation Rule**.
2. Click **New** to create an entry.
3. Enter:
   * **Sort Order:** 1
   * **Criteria:**
     + **Field:** Priority
     + **Operator:** equals
     + **Value:** High
   * **Age Over (Hours):** 4 (Escalate if not resolved within 4 hours)
   * **Business Hours:** Select the default hours (or your custom hours).
4. Click **Save & Next**.

**🔹 3️⃣ Define Escalation Actions**

1. Click **New** in the Escalation Actions section.
2. Enter:
   * **Assign To:** Your Manager (or a queue)
   * **Notification:** Check the box to notify the new owner via email.
3. Click **Save**.

**🔹 4️⃣ Activate the Escalation Rule**

1. Go back to the **Escalation Rules page**.
2. Click the **dropdown** next to the rule and select **Activate**.

**🔹 5️⃣ Test the Escalation Rule**

1. Create a **New Case**.
2. Set **Priority = High**.
3. Wait **4 hours** (or temporarily reduce the escalation time for testing).
4. Check if the **case owner changes to the manager or queue**.