1. Customize an Org to Support a New Business Unit

2. Automate Your Business Process

Automate Your Business Process

Create Assignment Rules

Assignment rules define conditions that determine how leads or cases are processed. You've been asked by Customer Support team manager Kenya Collins to establish case rules so billing cases are routed to the correct queue.

Start by creating a new Billing Support Agents queue.

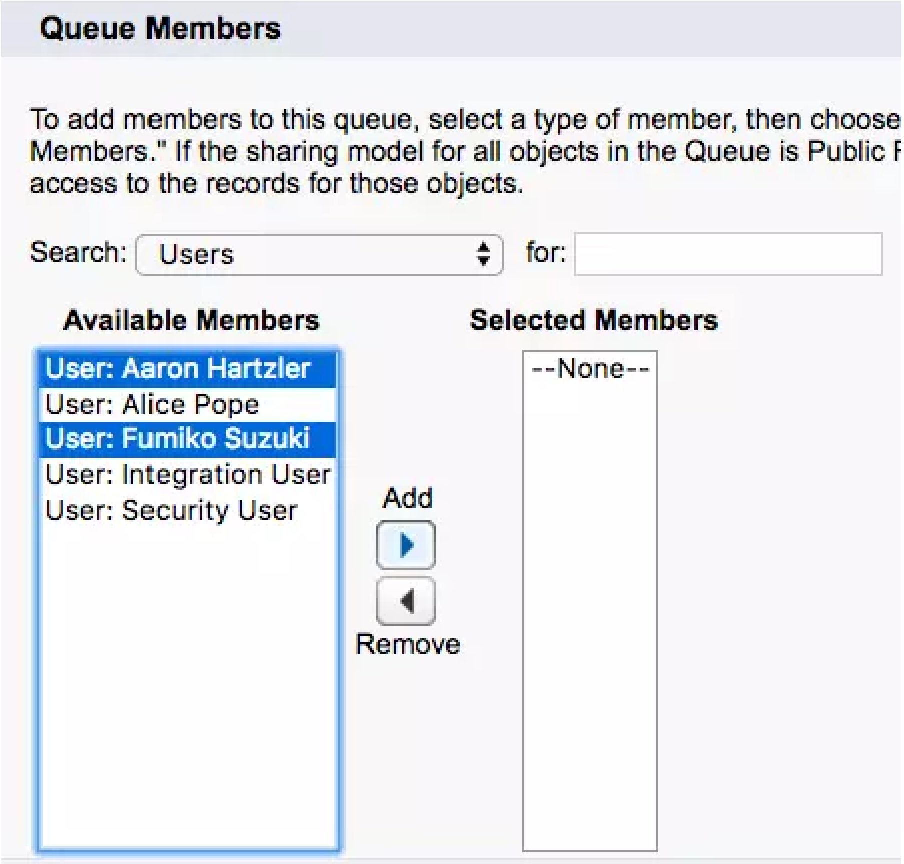
1. Click **Setup** and select **Setup**.
2. Enter `Queues` in the Quick Find box, then select **Queues**.
3. Click **New** and complete the details about the new queue:

Field	**Value**
Label	`Billing Support Agents`
Queue Name	(this field auto-populates)
Send Email to Members	Deselect

4. From the Available Objects list, select **Case**.
5. Click **Add** to move Case to the Selected Objects list.

Next, add queue members.

1. In the Queue Members section, search **Users**.
2. From the Available Members list, select **User: Aaron Hartzler** and **User: Fumiko Suzuki**.
3. Click **Add** to add to them to the Selected Members list, then click **Save**.



Then add a new rule entry to the Standard Case Assignment rule to route billing cases to the Billing Support Agents queue.

1. From Setup, enter `Case Assignment Rules` in the Quick Find Box, then select **Case Assignment Rules**.
2. Click the **Standard** case assignment link, then click **Edit**.
3. Select the **Active** checkbox to ensure this as the active case assignment rule, and click **Save**.
4. Click **New** in the Rule Entries section and enter these details:

Field	Value
Step 1: Sort Order	`2`
Step 2: Run this rule if the following	criteria are met
(1st row) Field	Case: Status
Operator	equals
Value	New (click the lookup icon, select New and Insert Selected)
(2nd row) Field	Case: Case Record Type
Operator	equals

Value	Billing (click the lookup icon, select Billing and Insert Selected)

5. In Step 3, select the picklist value **Queue** from the list.
6. Click the **lookup** icon, then search for and select **Billing Support Agents**.
7. Click **Save**.

Now create a new billing support case to test the assignment rule.

1. Click the **App Launcher** and then select **Cases**.
2. Click **New**.
3. Select **Billing** and click **Next**.
4. Complete the inquiry case details:

Field	**Value**
Contact Name	Sean Forbes
Account Name	`Edge Communications`
Product	(choose any product from drop-down)
Type	Electronic
Case Origin	Phone
Subject	`Renew Warranty`
Description	`Client wants to renew warranty on laptop`
Assign using active assignment rule	Select

Note: If "Assign using active assignment rule" is not appearing when creating a new case, return to the Case Assignment Rule menu in Setup. Edit the Standard case assignment and uncheck the active checkbox and save. After saving, check the active checkbox again and save. This toggle will ensure "Assign using active assignment rule" appears when creating a new case.

5. Click **Save**.

Create Escalation Rules

Escalation rules automatically escalate a case when it meets the criteria you choose. Kenya would like her Customer Support team to be notified whenever a case regarding an issue with performance is logged. Set that up for them.

Start by creating a new escalation rule.

1. From Setup, enter `Escalation Rules` in the Quick Find Box, then select **Escalation Rules**.
2. Click **New** and and fill in Rule Name: `Support`.
3. Click the **Active** checkbox and click **Save**.
4. Choose the new **Support** rule from the Case Escalation Rules list.
5. Click **New** under Rule Entries and fill in these details:

Field	**Value**
Step 1: Sort Order	`1`
Step 2: Run this rule if the following	criteria are met
Field	Case: Case Reason
Operator	equals
Value	Performance (click the lookup icon, select Performance and Insert Selected)

6. Click **Save**.

Now update the Rule Entries of the newly created Support escalation rule.

1. Click **New** under Escalation Actions and enter the Age Over value to `1`.
2. In the Notify This User field select the **Lookup** then search for and click on your name.
3. For the Notification Template select the **Lookup**, navigate to the Unfiled Public Classic Email Templates folder, and choose the **Support: Escalated Case Notification** template.
4. Click **Save**.

Create a new Product Support case for Edge Communications and review the escalation actions in the Case Escalations queue.

1. Click the **App Launcher** and then select **Cases**.
2. Click **New**, then select **Product Support** as record type and click **Next**.
3. Fill in the new case record details:

Field	**Value**
Contact Name	Sean Forbes
Account Name	`Edge Communications`
Product	(choose any product from the drop-down)
Type	Electronic
Case Origin	Email

Case Reason	Performance
Subject	`Laptop not working`
Description	`Client laptop is not working`
Assign using active assignment rule	Select

4. Click **Save**.
5. Copy the case number of the case you just created.
6. From Setup, enter `Case Escalations` in the Quick Find Box, then select **Case Escalations**.
7. Filter the case escalations queue to show the case you just created by entering the criteria: **Case To Escalate equals** [case number for the case you just created].
8. Click **Search**. Note the escalation actions in the queue and when can you expect to see an escalation alert email for this case.

Congratulations! You finished the project and customized your org. From setting up users and managing Chatter to creating record types and processes, with these building blocks in your toolbox, you're well on on your way to becoming an expert Salesforce admin.

Assessment Complete!

+100 points

Customize an Org to Support a New Business Unit
100%
Progress: 100%
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