Phase 3: Data Modeling & Relationships

1. Case Object Overview

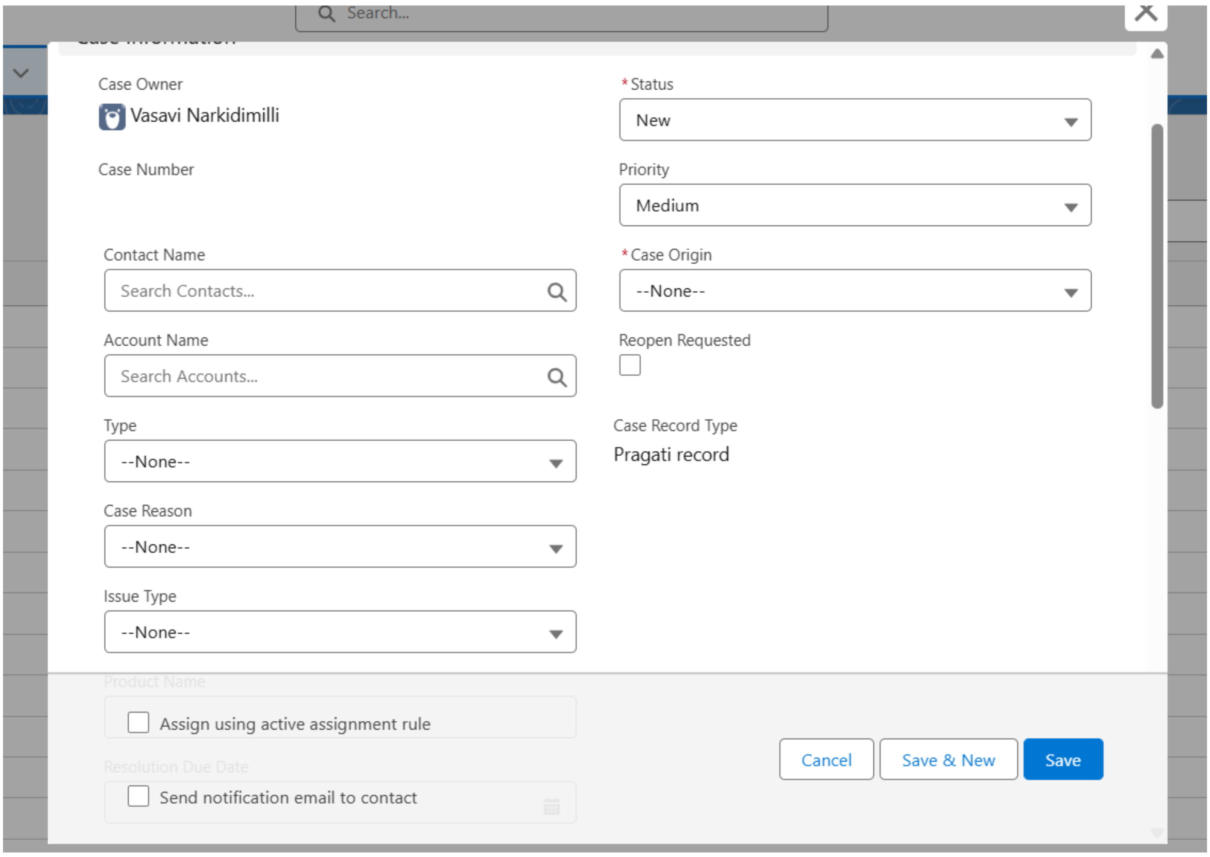
- **Cases** represent customer issues or service requests in Salesforce.
- The Case object is central to tracking, managing, and resolving customer issues efficiently.
- **Objects used:** Case, Account, Contact
- **Relationships**:

  Lookup Relationship between Case → Account

  Lookup Relationship between Case → Contact

- Existing **page layouts** were customized to include essential fields like:

2. Case Creation



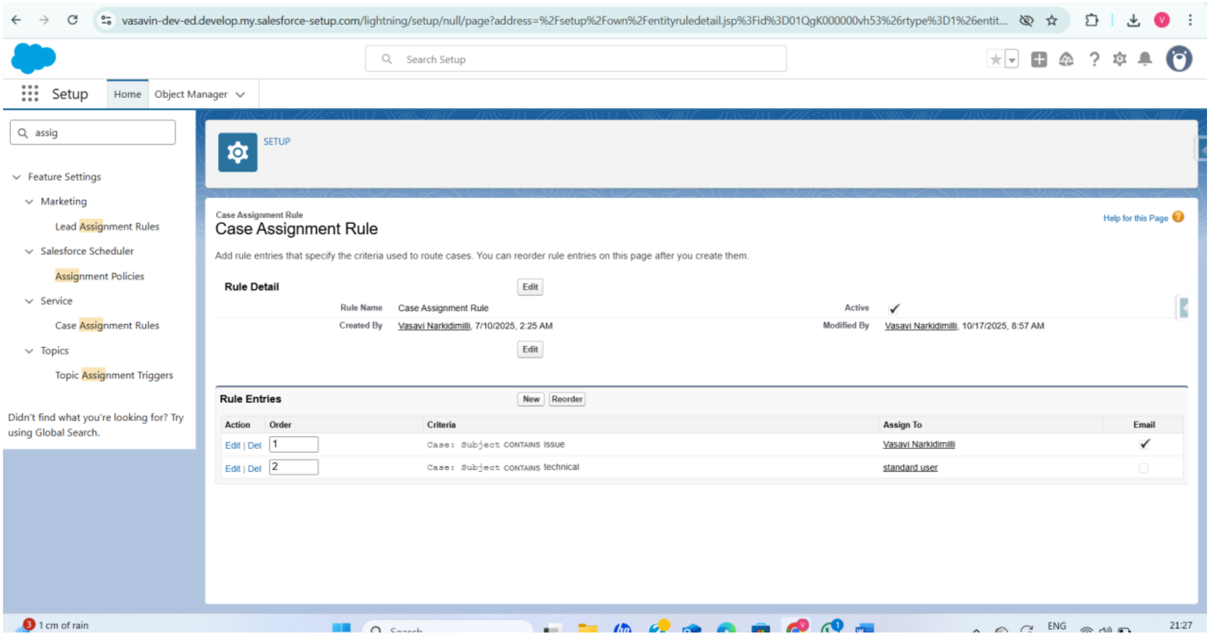
- **Manual Case Creation**:

- Users (Support Manager or Support Agent) can create a new case via the **Cases tab**.
- Required fields: Customer Name, Case Type, Priority, Description, and Status.

- **Automated Case Capture**:
  - Email-to-Case or Web-to-Case can be configured (future enhancement) to automatically create cases from customer emails or web forms.

3. Case Assignment

- **Assignment Rules**:
  - Cases are automatically assigned to agents based on **priority, issue type, or workload**.



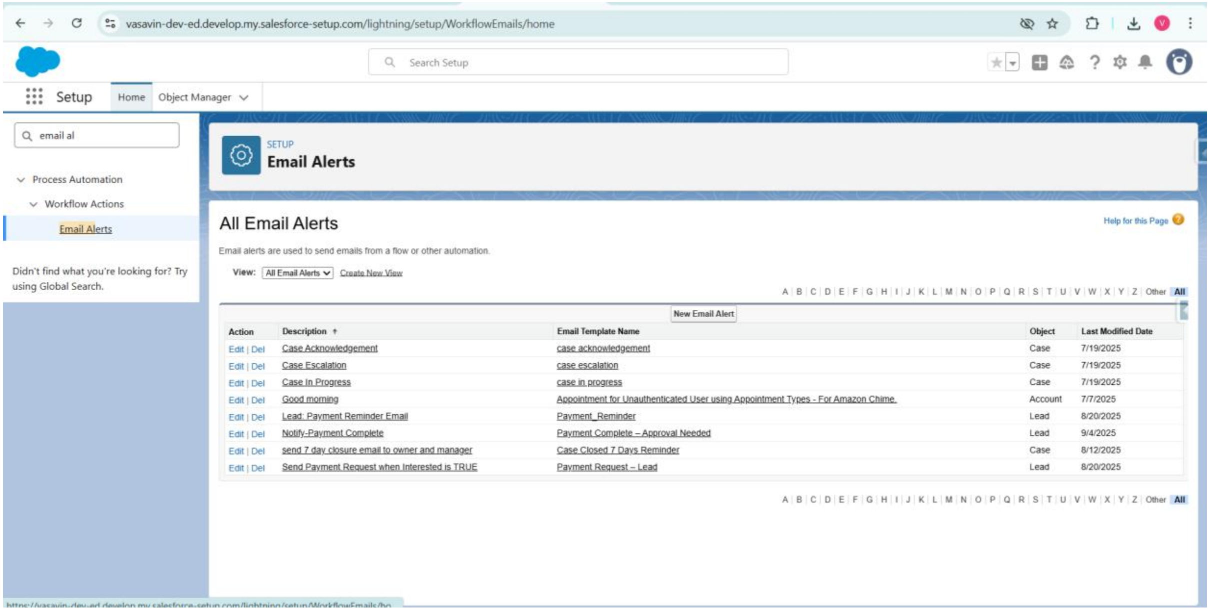
- **Manual Assignment**:
  - Support Managers can reassign cases to ensure efficient workload distribution.

4. Case Status & Lifecycle

- Customized **Status picklist** to track case progress:
  - New → In Progress → Escalated → Resolved → Closed
- Support agents update the status during the case lifecycle.
- Validation rules prevent reopening a case after **7 business days** to maintain SLA compliance.

5. Communication & Email Alerts

- Configured **Email Alerts** for:
  - Case creation acknowledgment to the customer.
  - Status updates (e.g., Resolved, Escalated).
- Automation reduces manual communication and ensures timely updates.



6. Outcome of Phase 3

- All cases can now be **created, assigned, and tracked** efficiently.
- Automated alerts ensure **consistent communication** with customers.
- Customized layouts and validation rules improve **data accuracy** and workflow efficiency.