

Phase 10: Final Presentation & Demo Day

Objective

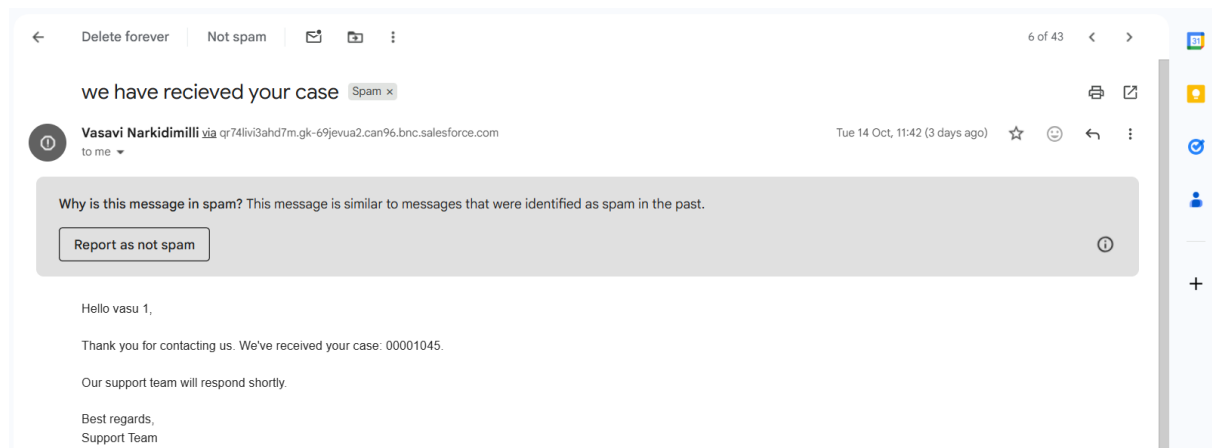
To present and demonstrate the **end-to-end Salesforce Case Management System** built to:

- Track and manage **cases efficiently**
- Assign and monitor **case ownership**
- Automate communications for **case status updates**
- Provide **real-time dashboards** for monitoring case workload and performance

Solution Overview

Core Modules Implemented

- **Case Management** → Capture case details, priorities, status, and assign to agents
- **Account & Contact Management** → Link cases to customers for better context
- **Automated Emails** → Acknowledgment on case creation, notifications on status changes (Working, Escalated)
- **Reports & Dashboard** → Open cases report, cases by owner report, Case Management Dashboard



←

Delete forever

Not spam

12 of 43

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your case is now in progress

Spam x

Vasavi Narkidimilli via 36mvdltwtopm6.gk-69jevua2.can96.bnc.salesforce.com
to me

Tue 14 Oct, 11:27 (3 days ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Hello vasu,

Just letting you know that your case 00001045 is now being worked on by our support team.

We'll update you soon with the resolution.

Thank you,

Support Team

We've received your case!

←

Delete forever

Not spam

11 of 43

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Your Case 00001045 Has Been Escalated

Spam x

Vasavi Narkidimilli via 4l5f4x8ye5k0bz.gk-69jevua2.can96.bnc.salesforce.com
to me

Tue 14 Oct, 11:28 (3 days ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Dear vasu 1,

We wanted to inform you that your case (#00001045) regarding "" has been escalated to a higher support level for quicker resolution.

Our team is actively reviewing your case and will get back to you as soon as possible.

Thank you for your patience.

Best regards,
Support Team

Reply

Forward

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Delete forever

Not spam

9 of 43

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Case 00001045 closed for 7 days

Spam x

Vasavi Narkidimilli via j3nz96vfjcjg.gk-69jevua2.can96.bnc.salesforce.com
to me, vasu11092005@gmail.com

Tue 14 Oct, 11:28 (3 days ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report as not spam

Hello Vasavi,

This is a reminder that case 00001045 has been closed for 7 days.

Please review and take follow-up action if needed.

Thanks,
Salesforce Support Team

Reply

Forward

User Roles & Profiles

- **Admin** → Full access to all objects, reports, and dashboards
- **Support Manager** → Manage cases, view team performance reports
- **Support Agent (Vasavi)** → Access only assigned cases and related dashboard

Demo Walkthrough

1. Case Creation

- Enter case details: customer info, priority, description
- Auto-trigger **case acknowledgment email**

2. Case Update

- Change status to “Working” → triggers **in-progress notification**
- Change status to “Escalated” → triggers **escalation notification**

3. Dashboard & Reports

- **Open Cases Report** → Tracks pending work
- **Cases by Owner Report** → Shows cases assigned to Vasavi
- **Case Management Dashboard** → Consolidates key metrics in one view

Achievements

- Fully functional **end-to-end Case Management System**
- Automation-first design using **Flows & Email Alerts**
- Clean UI with **customized page layouts**
- **Secure access control** with Profiles & Field-Level Security (FLS)
- Data accuracy ensured with **Validation Rules**

Release Notes Highlights (v1.0)

- Configured **customized Case, Account, and Contact objects**
- Built **Flows for all major email notifications**
- Designed **Reports & Dashboard** for case monitoring
- Tested with **sample data** (10 Cases, 5 Accounts, 5 Contacts)
- Role-based access implemented for **Admin, Manager, and Agent**

Future Enhancements

- Online case submission portal for customers
- Mobile responsiveness via Salesforce Mobile App / LWCs
- AI-based case assignment using Einstein AI
- SLA alerts and advanced analytics for performance optimization

Final Notes

This Salesforce Case Management System will help your organization:

- Save time with **automated case notifications**
- Improve **support efficiency** and accountability
- Provide **real-time insights** into case workload and agent performance
- Scale operations with a **centralized CRM system**