

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

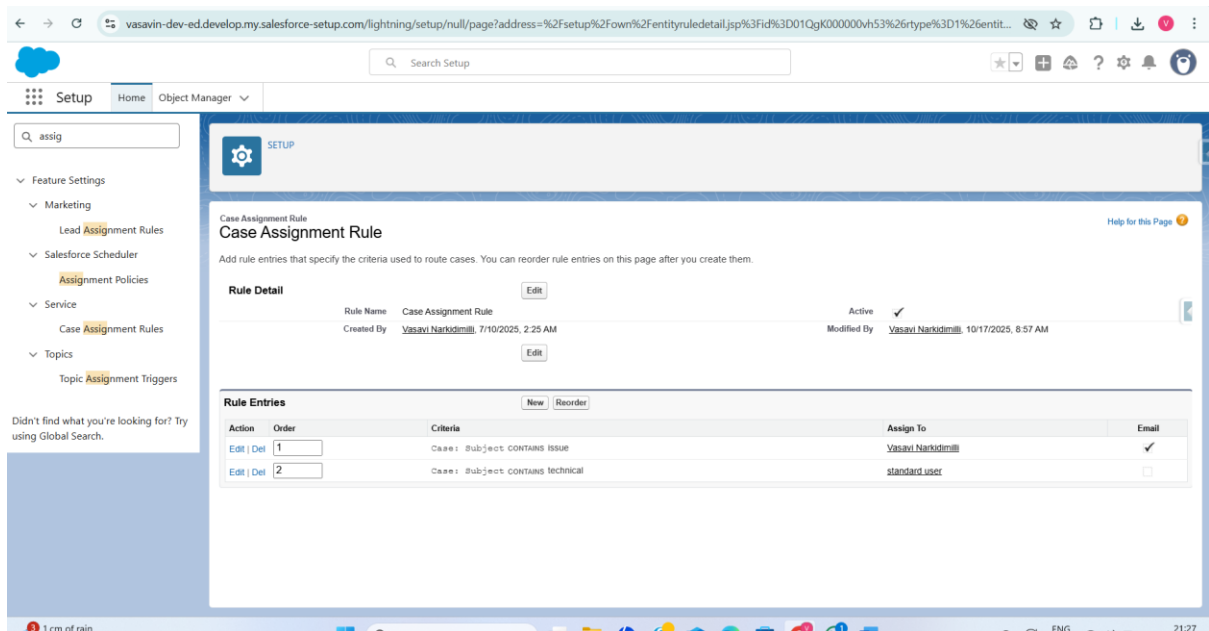
The screenshot shows the 'Case Information' form in Salesforce. The form is divided into two columns. The left column contains fields for Case Owner (Vasavi Narkidimilli), Case Number, Contact Name (with a search bar), Account Name (with a search bar), Type (--None--), Case Reason (--None--), and Issue Type (--None--). The right column contains fields for Status (New), Priority (Medium), Case Origin (--None--), Reopen Requested (checkbox), and Case Record Type (Pragati record). At the bottom, there are sections for Product Name (with a checkbox for 'Assign using active assignment rule') and Resolution Due Date (with a checkbox for 'Send notification email to contact'). The bottom right corner features three buttons: 'Cancel', 'Save & New', and 'Save'.

- **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**.



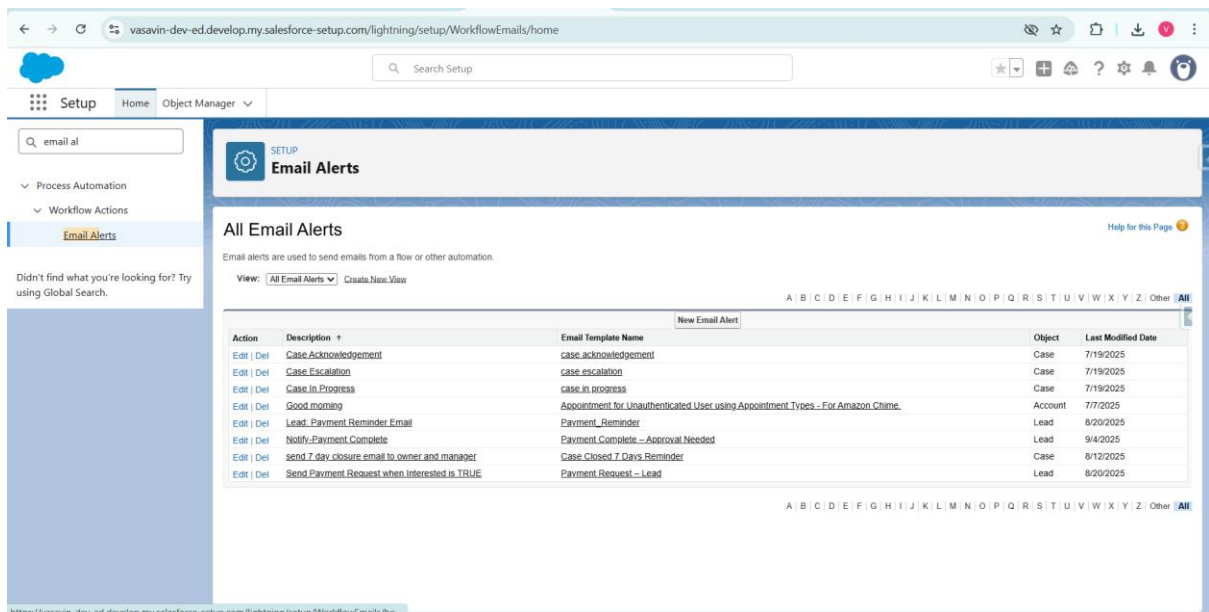
- **Manual Assignment:**
 - Support Managers can reassign cases to ensure efficient workload distribution.

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.