Case Management System (Admin + Developer Implementation)

Phase 1: Problem Understanding & Industry Analysis

Objective:
Implement a **Case Management System** to efficiently track, manage, and resolve customer support requests. The system automates notifications, enforces business rules, and enables better reporting for managers.

Industry Context:

- **Industries:** IT support, E-commerce, Telecom, Customer Service.

- **Challenges:**

  o   Delayed responses to customer queries.

  o   Cases left unassigned or unresolved.

  o   Manual tracking of escalations.

- **Salesforce Solution:**

  o   Centralized case tracking with automated **assignment rules**, **email alerts**, and **flows**.

  o   Improved **customer experience** with timely updates.

  o   **Reporting & dashboards** for management visibility.

Phase 2: Org Setup & Configuration (Admin)

Steps Taken:

1. **Salesforce Developer Org:**

   o   Created account at developer.salesforce.com.

   o   Logged in and accessed **Setup**.

2. **Support Settings:**

   o   Enabled:

      ▪   Enable Case Comment Notifications to Contacts

      ▪   Enable Case Feed Actions and Feed Items

   o   Ensured better **UI and notification experience**.

3. **User Management:**

   o Created test users to simulate **support agents**.

   o Enabled login notifications.

4. **Email Templates:**

   o Templates for:

   ▪ **Case Acknowledgement**

   ▪ **Case In Progress**

   ▪ **Case Escalation**

5. **Email Alerts:**

   o Linked templates with **Email Alerts** for automatic communication.

6. **Email-to-Case:**

   o Enabled to allow **automatic case creation via emails**.

Phase 3: Data Modeling & Relationships (Admin + Developer)

Case Object Customization:

- Added **Custom Fields:**

  o Issue Type (Picklist)

  o Product Name (Text)

  o Resolution Due Date (Date)

  o Reopen Requested (Checkbox)

  o Case Closed Date (Date)

- Updated **Page Layouts:**

  o Dragged fields into **Case Layout**: Status, Priority, Contact Name, Description, Custom Fields.

- **Custom Label:**

  o Name: Days_To_Lock_Case

  o Value: 7

  o Used in validation rules and flows for **configurable reopen period**.

Phase 4: Process Automation (Admin)

Assignment Rules:

- Created Case Assignment Rule to auto-assign cases based on **subject keywords**.

Auto-Response Rules:

- Email alerts triggered automatically based on **status changes**.

Flows (Record-Triggered):

- **Case In Progress Flow:** Triggered when status changes to *Working*.

- **Case Escalation Flow:** Triggered when status changes to *Escalated*.

Validation Rules:

- Prevent case reopening if **more than 7 days** have passed since closure.

Testing:

- Created sample cases and tested:

    - Status change notifications

    - Auto-assignment

    - Email alerts

    - Reopen restrictions

Phase 5: Apex Programming (Developer)

Developer Enhancements:

1. **Custom Logic via Apex (Optional/Enhancement):**

    - Apex triggers could enforce complex business rules, e.g., auto-escalation for high-priority unresolved cases.

    - Example Trigger Logic:

        - Update Case Escalation Date if Resolution Due Date is missed.

2. **Integration with Custom Flows:**

    - Developer flows used **formulas and custom labels** to calculate days since closure.

Formulas:

- Days Since Closed = IF(ISPICKVAL(Status, "Closed"), TODAY() - DATEVALUE(ClosedDate), null)

Phase 6: User Interface Development

UI Improvements:

- **Case Feed** enabled for agents to track updates.
- Custom **Page Layouts** and **Quick Actions:**
  - Reopen Case button
  - Assign Case button
- Embedded **Email Alerts** and **Flows** for automated notifications.

Phase 7: Integration & External Access

Email-to-Case Integration:

- Customers can email support@yourorg.salesforce.com
- Salesforce auto-creates cases and triggers **assignment and notification workflows**.

Phase 8: Data Management & Deployment

Data Setup:

- Created **sample cases** to test functionality.
- Imported via **Data Loader / CSV** if needed.

Reopen Case Feature (Developer + Admin):

- Record-Triggered Flow updates Case Closed Date automatically.
- Validation Rule blocks reopening after 7 days using Days_To_Lock_Case custom label.

Phase 9: Reporting, Dashboards & Security Review

Reports Created:

1. Open Cases by Priority
2. Cases Assigned to Me
3. Cases Not Assigned to Me

Dashboard:

- Visual components for above reports.
- Named: Case Management Dashboard

Security Review:

- Field-level security checked for all custom fields.
- Validation rules prevent unauthorized reopening.

- User profiles restricted based on role.

Phase 10: Final Presentation & Demo Day

Testing:

- End-to-end test:

    1. Create Case → Auto-assignment → Email notification.

    2. Status Update → Trigger flows → Email alerts.

    3. Close → Attempt Reopen within 7 days → Allowed.

    4. Attempt Reopen after 7 days → Blocked (validation message).