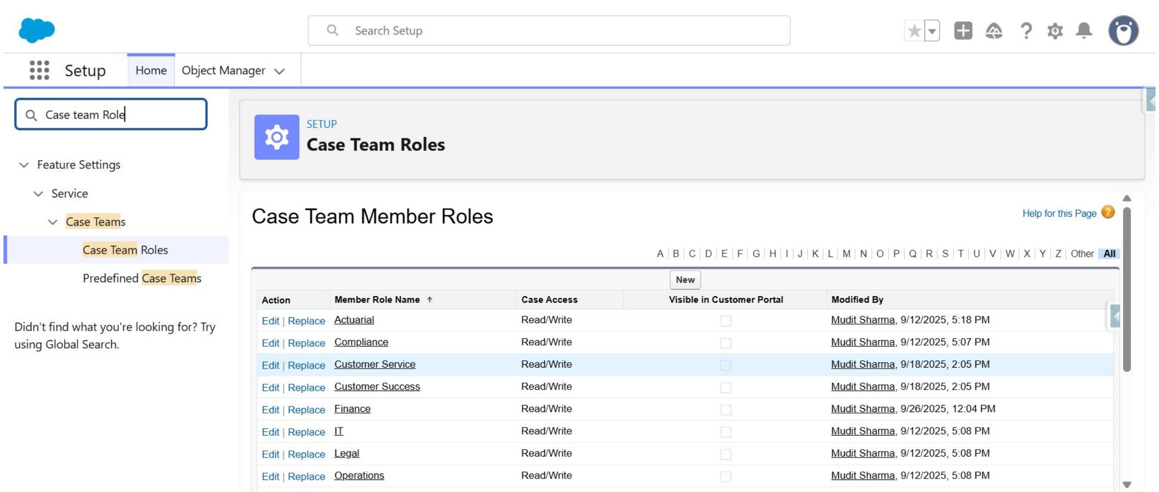
CRMIT Customer Success Partner aimplifAI

1. Assign the Case InsAIghts Permission Set

Steps:
1. From Setup, click the **Gear icon** → **Setup**.
2. In the **Quick Find** box, type **Permission Sets** and select it.
3. Search for the permission set named **Case InsAIghts**.
4. Click **Manage Assignments**.
5. Click **Add Assignments**.
6. Select the users who will access or configure Case InsAIghts.
7. Click **Assign** → **Done**

2. Add Case Team Roles

Steps:
1. Navigate to **Setup** → In the **Quick Find** box, type **Case Team Roles**.
2. Under **Service** → **Case Teams**, click **Case Team Roles**.
3. Click **New** to create a new Case Team Member Role.
4. Enter the **Role Name** (for example, *Legal*, *Finance*, *Compliance*, *IT*, *Sales*).
5. Set **Case Access** to **Read/Write**.
6. (Optional) Leave **Visible in Customer Portal** unchecked unless required.
7. Click **Save**.
8. Repeat the process for each department involved in your case workflows.

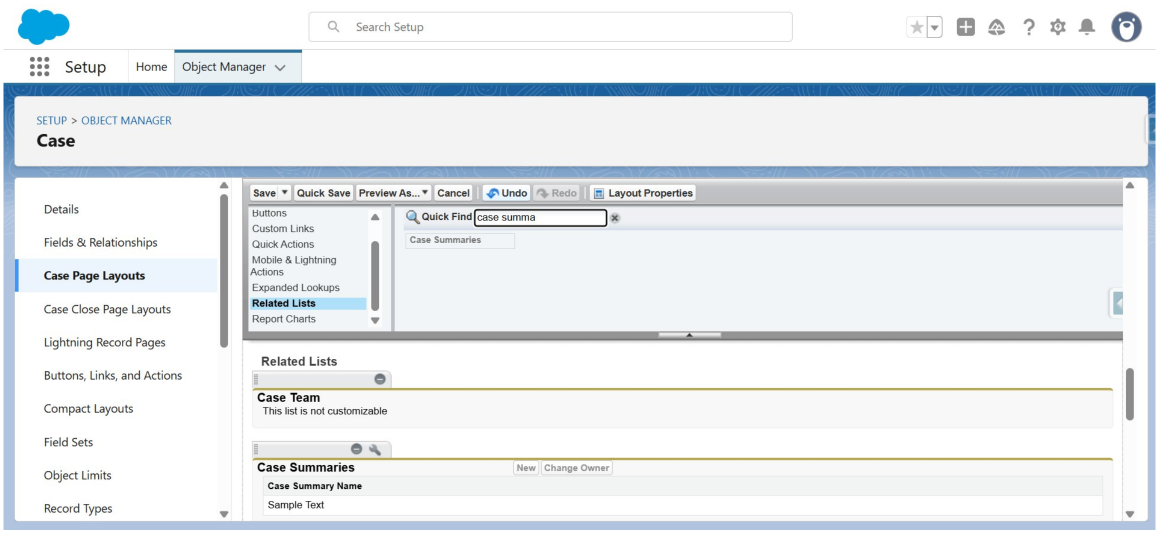


3. Add Notes, Case Teams, and Case Summaries to the Case Related Lists

Steps:
1. Navigate to **Setup** → **Object Manager** → **Case**.
2. Click **Page Layouts** under the Case object.
3. Select the layout used for your users (for example, *Case Layout*).
4. In the **Related Lists** section, drag and drop the following related lists onto the layout:

Notes
Case Teams
Case Summaries *(Custom Object: Case_Summary__c)*

5. Position them as desired — for example, below the Case Details section.
6. Click **Save** to apply changes.



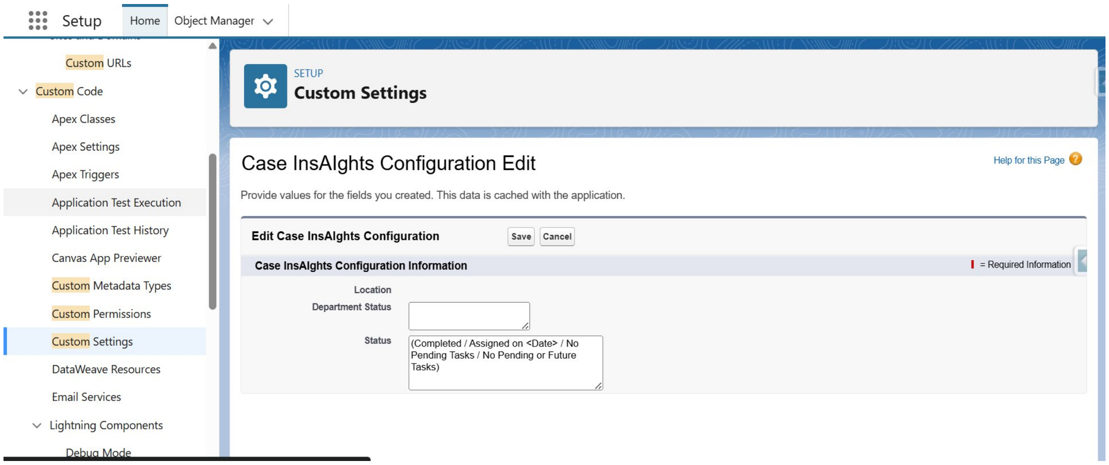
4. Configure Custom Setting – Case InsAIghts Configuration

Define the possible task status values that Case InsAIghts references while summarizing case progress.

Steps:

1. From Setup, click the ⚙ Gear icon → **Setup**.
2. In the Quick Find box, type **Custom Settings**.
3. Click **Case InsAIghts Configuration**.
4. Click **Manage**.
5. Click **New** (or **Edit** if an entry already exists).
6. Add the possible values of the task status.
   Example: **(Completed / Assigned on <Date> / No Pending Tasks / No Pending or Future Tasks)**

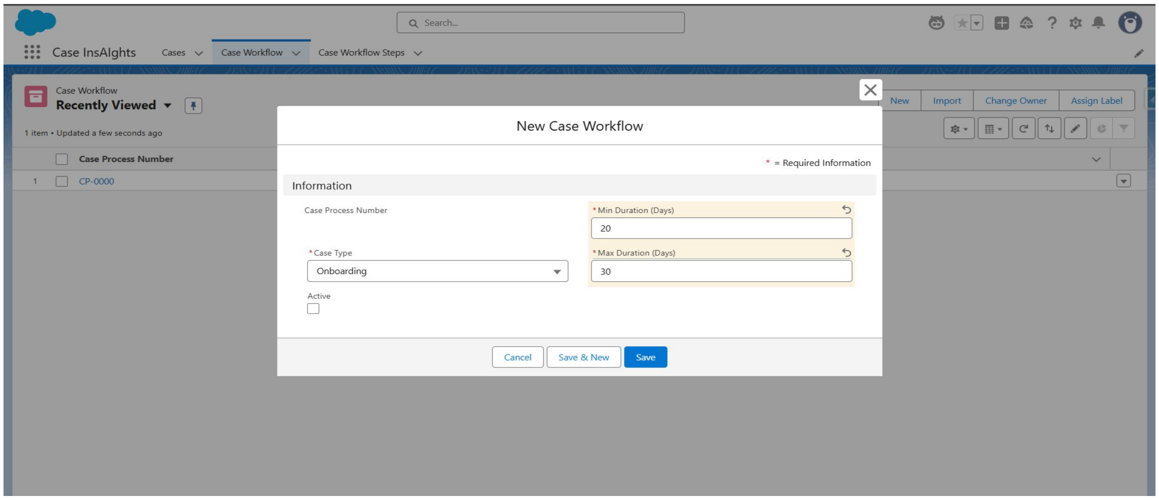
7. Click **Save**.



5. Add Case Workflow and Case Workflow Steps

Steps:

1. From the **App Launcher (Grid icon)**, open the **Case InsAIghts** app.
2. Navigate to the **Case Workflow** tab.
3. Click **New**.
4. Fill in the required details:
    - **Case Type** – Select the relevant type (for example, *Onboarding*, *Contract Approval*).
    - **Note** - The **Type** field on the **Case** object must match the **Case Type** field on the **Case Workflow** object.
    - **Min Duration (Days)** – Enter the minimum duration for the process (for example, *20*).
    - **Max Duration (Days)** – Enter the maximum duration for the process (for example, *30*).
    - **Active** – Check this box to mark the workflow as active.
5. Click **Save**.



Add Case Workflow Steps

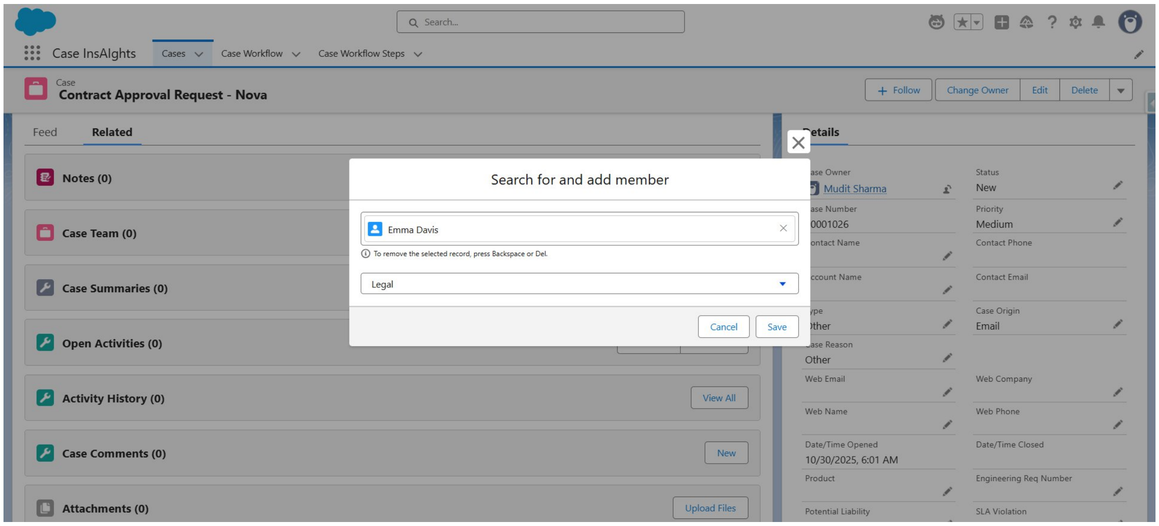
1. Navigate to the **Case Workflow Steps** tab.
2. Click **New**.
3. Enter the following details:
    - **Case Process Step Name** – Enter the step name (for example, *Gathering Initial Account Details*).
    - **Sequence** – Enter the step order (for example, *1*).
    - **Case Process** – Select the related case workflow (for example, *CP-0000*).
    - **Phase Owner** – Enter the team or department responsible (for example, *Sales*).
    - **Min Duration (Days)** – Enter the expected minimum time (for example, *2*).
    - **Max Duration (Days)** – Enter the expected maximum time (for example, *3*).
    - **Description** – Provide a brief explanation of the step's purpose.
4. Click **Save**.
5. Repeat the above process to define all steps within the workflow for each case type.

6. Add Case Team Members to the Case

Steps:

1. From the **App Launcher**, open the **Case InsAIghts** app.
2. Navigate to the **Cases** tab.
3. Open any existing Case record.
4. Click the **Related** tab on the Case record page.
5. Locate the **Case Team** related list.
6. Click **Add** to add a new member.
7. In the popup window:
    - Search for and select a **User** (for example, *Emma Davis*).
    - Choose the appropriate **Case Team Role** (for example, *Sales*, *Legal*, *Finance*,

Compliance, etc.).
8. Click **Save**.
Repeat this process to add one member for each phase or department involved in the case workflow (for example, *Sales, Legal, Compliance, IT*, and *Finance*).

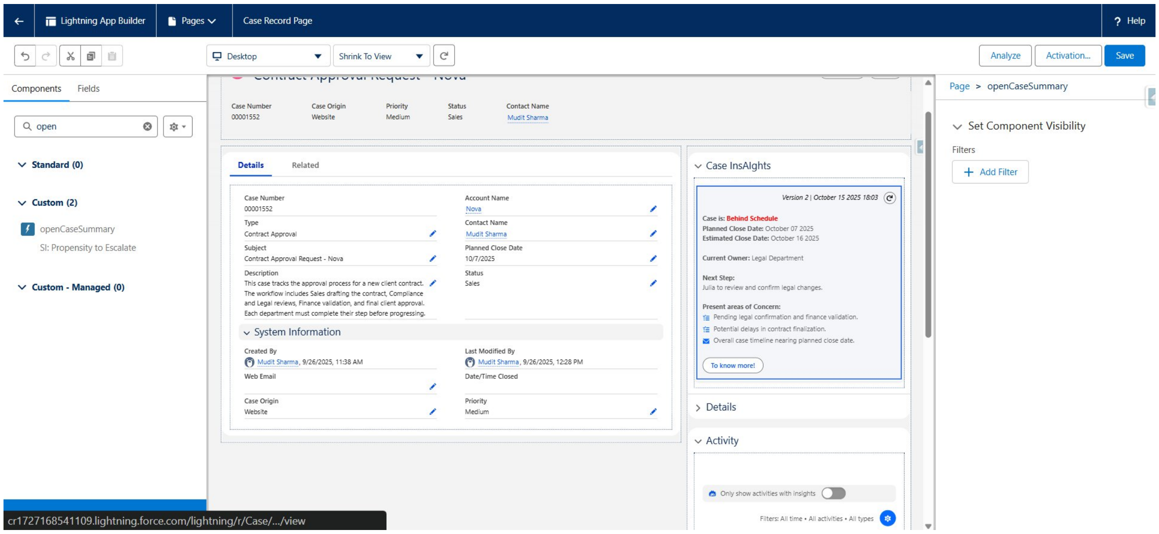


7. Add Case InsAIghts Component to the Case Record Page

Steps:
1. From Setup, click the **Gear icon** → **Edit Page** on any Case record.
The **Lightning App Builder** will open.
2. Click the **Accordion** component from the standard components list and drag it onto the page layout.
3. The Accordion is created with two default sections: **Related** and **Details**.
- Select the **Related** section.
- Change the section type to **Custom**.
- Update the **Label** to **"Case InsAIghts."**

4. Select the **Details** section**.**
- Set the section type to **Activity**.
- Click **Done**.

5. From the components list, drag the **Activities** component into the **Activity** accordion section.
6. From the components list, search for and drag the **openCaseSummary** LWC into the **Case InsAIghts** accordion section.
7. Click **Save**, then **Activate** (if prompted).



8. Configure Spinner Messages for Case InsAIghts

To display dynamic, user-friendly messages while the Case InsAIghts component processes and generates AI summaries.

Steps:

1. Navigate to **Setup → Custom Metadata Types**.
2. Locate and click on **Spinner Message**.
3. Under **Manage Spinner Messages**, click **New**.
4. Enter the following details:

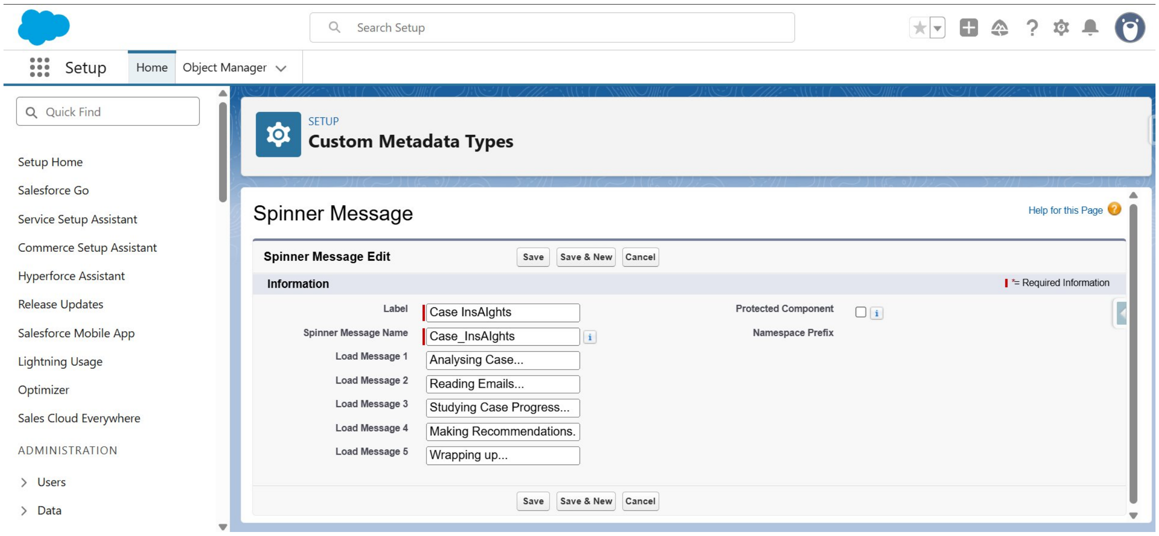
Label: Case InsAIghts

Spinner Message Name (API Name): Case_InsAIghts *(ensure the API name matches exactly)*

5. Fill in the Load Messages fields with short, descriptive text that will appear during processing:

- **Load Message 1:** Analysing Case...
- **Load Message 2:** Reading Emails...
- **Load Message 3:** Studying Case Progress...
- **Load Message 4:** Making Recommendations...
- **Load Message 5:** Wrapping up...

6. Click **Save** to create the Spinner Message record.



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Spinner Message
Help for this Page
Spinner Message Edit
Save
Save & New
Cancel
Information
= Required Information
Label
Case InsAIghts
Spinner Message Name
Case_InsAIghts
Load Message 1
Analysing Case...
Load Message 2
Reading Emails...
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Load Message 4
Making Recommendations.
Load Message 5
Wrapping up...
Protected Component
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Save
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