CASE TRACER

User Manual

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1. Getting Started

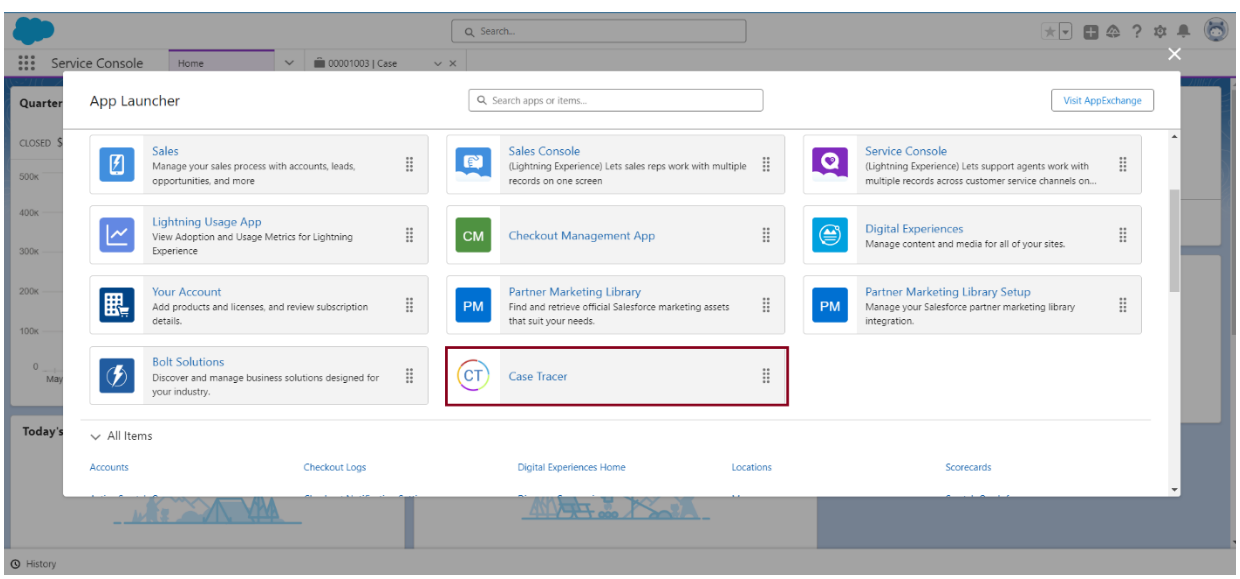
1.1. Introduction:

Case Tracer extends the capabilities of the default Case object, offering users enhanced functionality with features like **Session Timer** and **Recommended Response Time** where agents can effectively manage their time and prioritize cases.

The **Case Tracer History Tracking** feature allows users to monitor changes in case history. Additionally, **Case Matching and Case Merging** simplifies the process of identifying and merging similar case records.

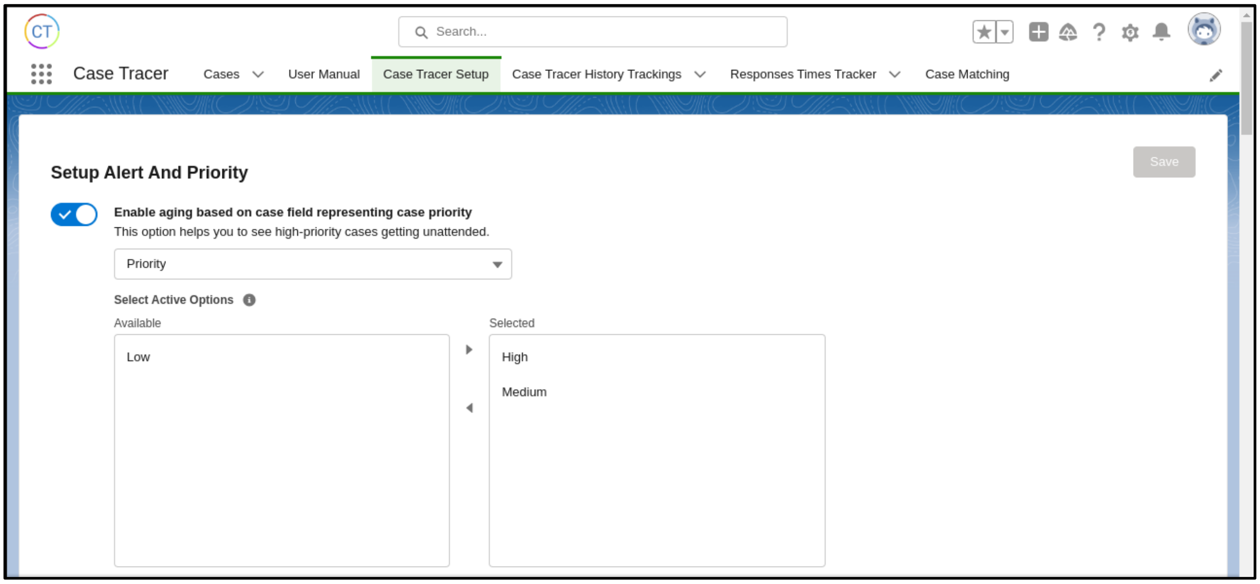
1.2. Access Case Tracer App:

After installing the package, go to the **Case Tracer** app and follow these steps.:
1. Click on the App Launcher icon to open it.
2. In the search bar at the top of the App Launcher, type "Case Tracer" and press Enter.
3. Once Case Tracer appears in the search results, click on it to open the app.



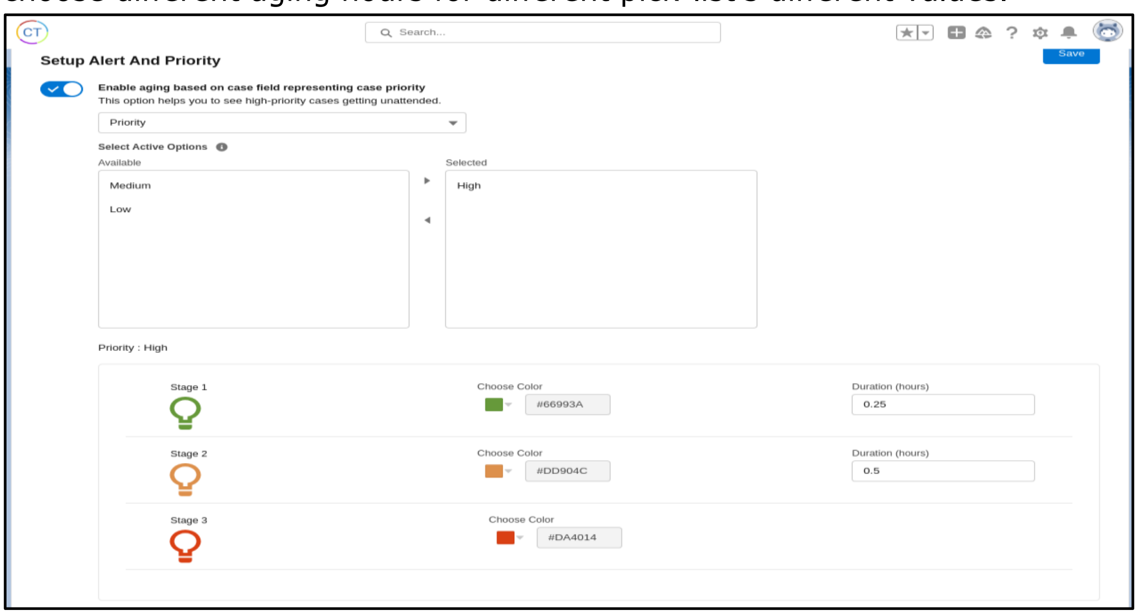
2. Case Tracer Setup

This is the setup page of the app. After installing the app, the admin will adjust the settings based on the company's requirements.
Navigate to **Case Tracer** in the app drop-down menu in the top-right corner of any page, and click the **Case Tracer Setup** tab.



2.1. Setup Alert And Priority:

This setup is for the Recommended Response Time. After enabling "Enable aging based on the case field representing case priority" the user gets the option to choose different aging hours for different pick-list's different values.

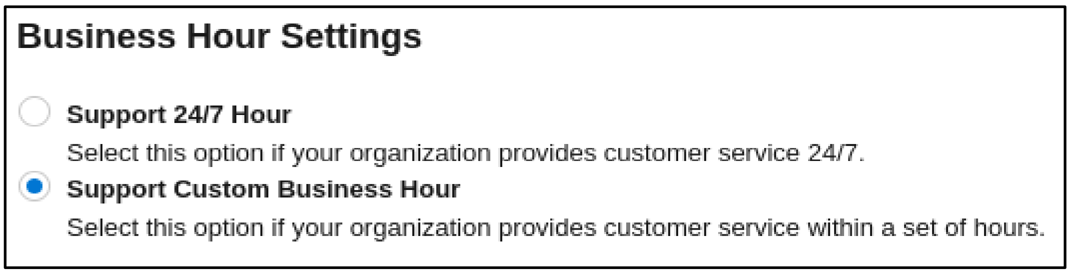


2.2. Business Hour Settings:

This portion only consists of 2 radio buttons. By selecting a button, the user decides which Business Hour they want to use for this app.

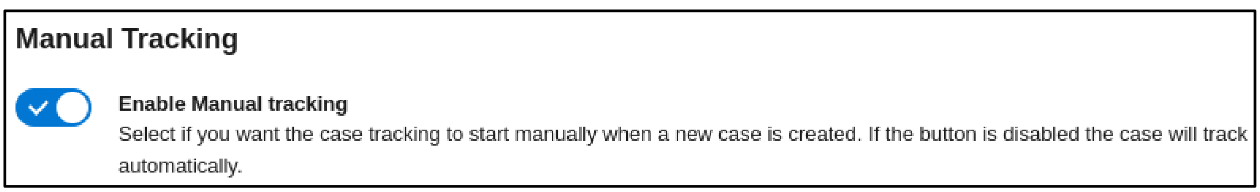
Support 24/7 Hour: When **Support 24/7 Hour** is selected from the **Business Hour Settings** section of setup, Case Tracer will include the time elapsed outside your company's normal hours of operation.

Support Custom Business Hours: When **Support Custom Business Hours** is selected from the **Business Hour Settings** section of setup, Case Tracer will exclude the time elapsed outside your company's normal hours of operation.



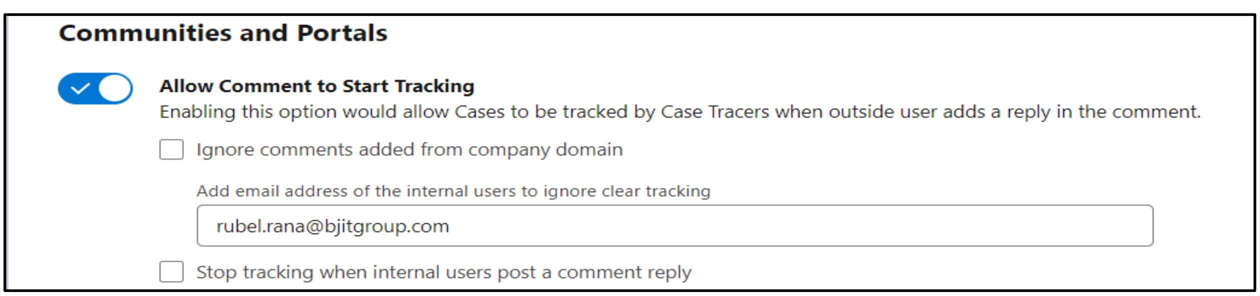
2.3. Manual Tracking:

This setup is for the Recommended Response Time. When "Enable Manual tracking" is disabled, the "Recommended Response Time'' timer starts automatically based on some criteria.



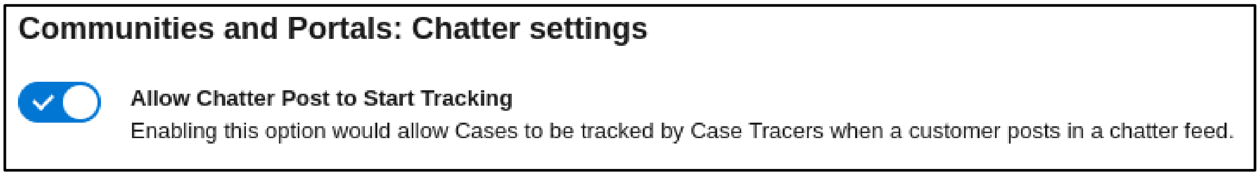
2.4. Communities and Portals:

This setup is for the Recommended Response Time. After enabling "Allow Comment to Start Tracking" the "Recommended Response Time" timer starts automatically when an outside user adds a reply in the comment from an external site.



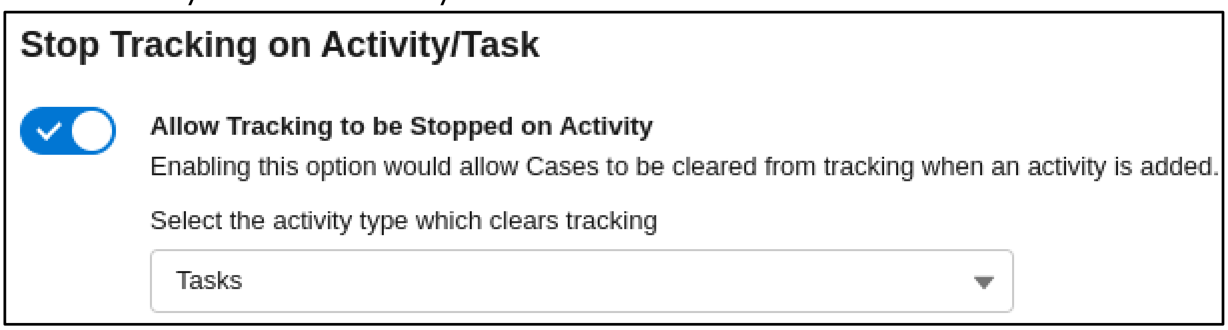
2.5. Communities and Portals: Chatter settings:

This setup is for the Recommended Response Time. After enabling "Allow Chatter Post to Start Tracking" the "Recommended Response Time" timer starts automatically based on customer posts in a chatter feed.



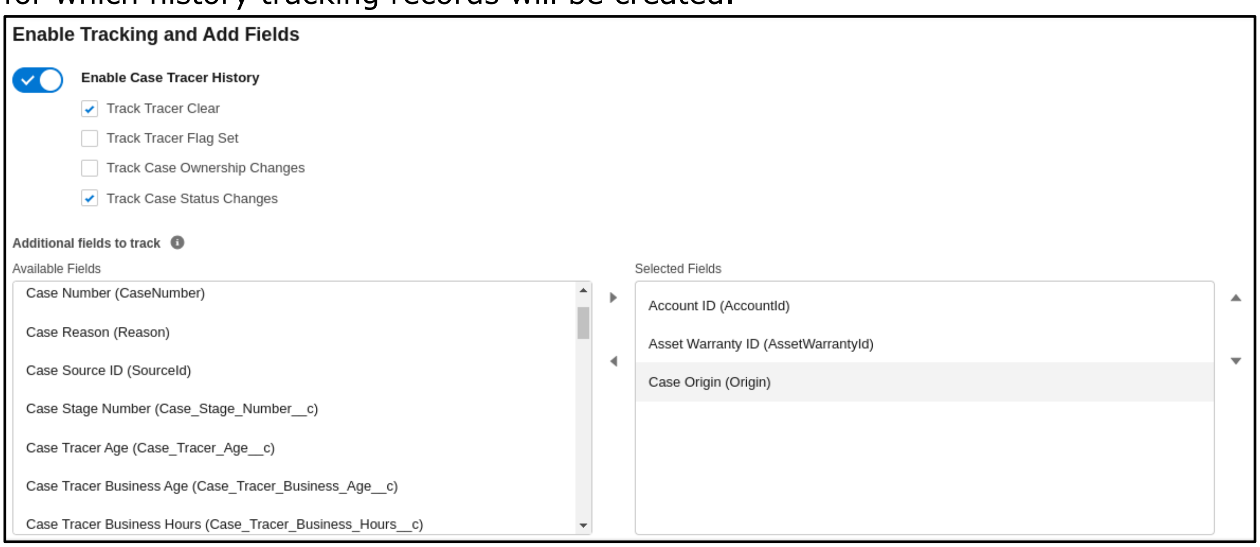
2.6. Stop Tracking on Activity/Task:

This setup is for the Recommended Response Time. After enabling "Allow Tracking to be Stopped on Activity" the "Recommended Response Time" timer stops automatically when an activity or task is added.



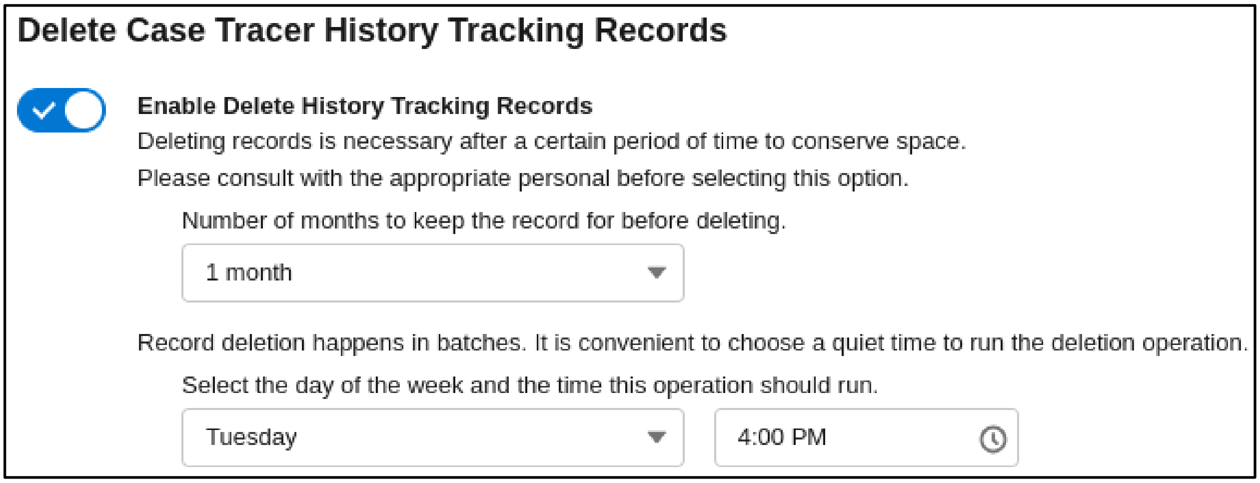
2.7. Enable Tracking and Add Fields:

To start case history tracking, enable "Enable Case Tracer History" & choose fields for which history tracking records will be created.



2.8. Delete Case Tracer History Tracking Records:

To delete the access history tracking records enable "Enable Delete History Tracking Records" and select the record age and a specific time when the records will be deleted.



3. Session Timer

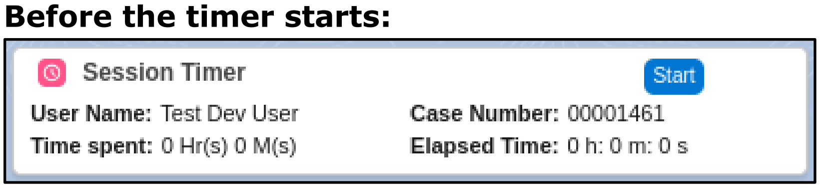
After the user enters a **case** record, the component is situated in the top right corner. This feature is to track how much time an agent spends on a case record. The explanation of this feature is given below.

- The Start button will start the timer until the user presses the Stop button.
- If the same user starts another case's timer from another pc's browser, the timer will stop.
- If the same user starts another case's timer from the Salesforce phone app, the timer will stop.
- When the case is closed, the timer will stop.

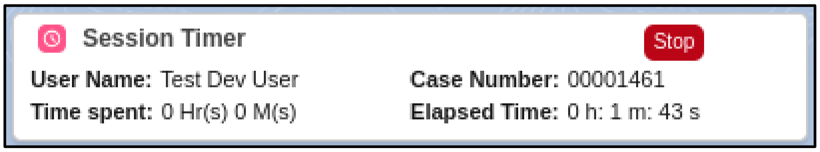
While the timer is running 4 information is shown on the component.

1. **User Name:** Name of the logged-in Salesforce user.
2. **Case Number:** Default Case Number of the case record.
3. **Time Spent:** Total time the agent has worked on this case.
4. **Elapsed Time:** This is a live timer that shows how much time the agent has worked on the case in this current session.

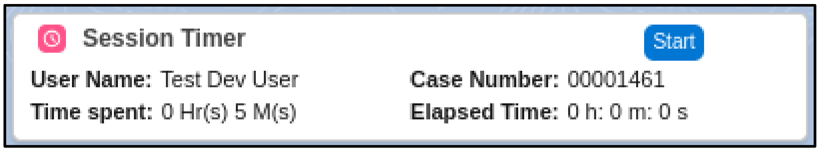
Before the timer starts:



After the timer starts:



After the timer stops: (Time spent field has been updated)

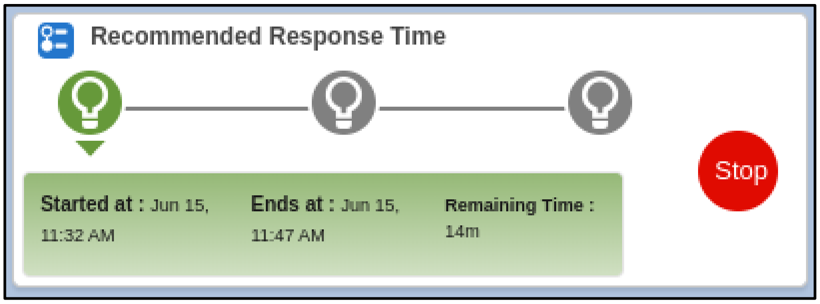


4. Recommended Response Time

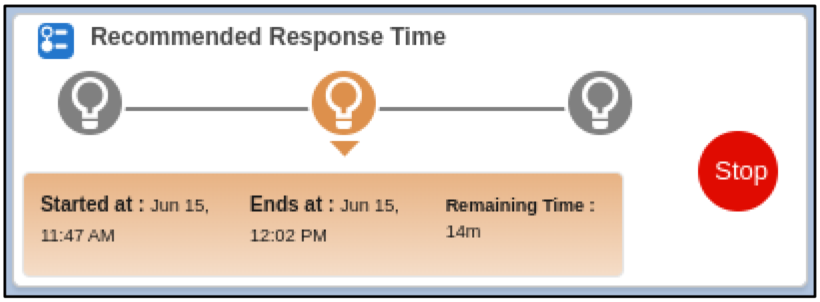
After the user enters a **case** record, the component is situated on the right side below the Session Timer. This feature is to track how much time it takes for an agent to start working on a case record. An explanation of this feature is given below.

- The Start button will start the timer until the user presses the Stop button.
- Creating a case will automatically start the case if the setting "Enable Manual tracking" is disabled on the setup page.
- When the outside user adds a reply to a case record's comment, the community portal site will automatically start the case if the setting "Allow Comment to Start Tracking" is enabled for the Communities and Portals site from the case tracer setup.
- When the outside user adds a post to a case record's chatter, the community portal site will automatically start the case if the setting "Allow Chatter Post to Start Tracking" is enabled for Communities and Portals: Chatter from case tracer setup.
- The timer has 3 stages. Stages 1 and 2 have a fixed amount of time that is defined on the setup page.
- When an activity is added to an already running tracked Case record will stop the timer if the setting "Allow Tracking to be Stopped on Activity" is enabled from the case tracer setup.

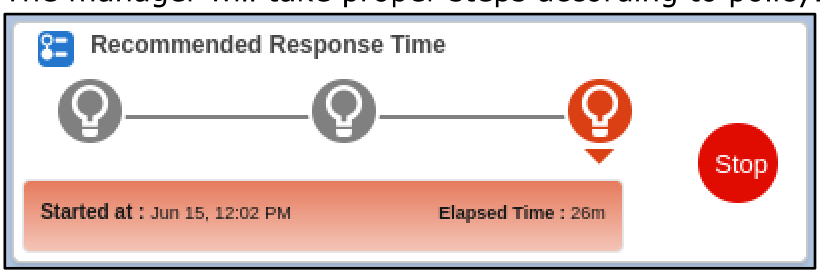
When the case is on Stage 1: It's recommended to solve a case when the timer is in Stage 1. The agent wants to solve the case while it's in Stage 1.



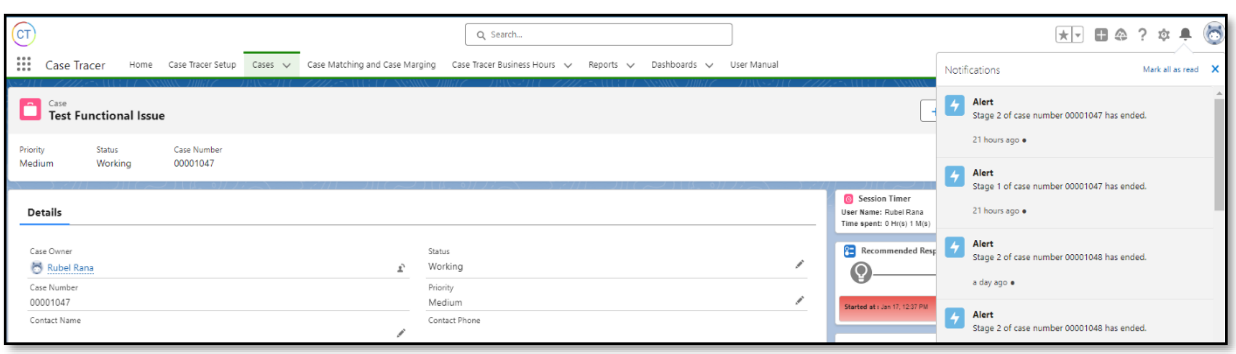
When the case is on Stage 2: Letting a case timer move from Stage 1 to Stage 2 is worrisome. Now this type of case will be a high priority and the agent will have to solve this case on an emergency basis. If the agent is unable to solve the case, the manager will assign this case to someone with more experience.



When the case is on Stage 3: When the timer moves to Stage 3; it means no one was able to solve the case and the customer service policy has been violated. The manager will take proper steps according to policy.



User Notification Alert: The system will send a Notification alert after completing a Stage.



5. Case Tracer History Tracking

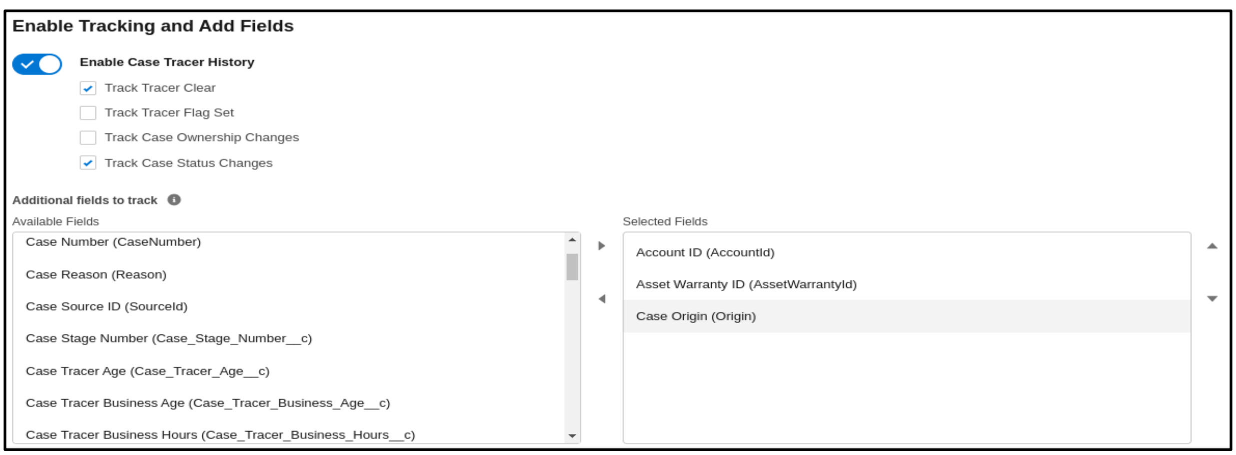
This is to track the change history of a case record.

5.1. Create "Case Tracer History Tracking" records:

Activate Tracking and Include Fields:
Easily customize your Case Tracer History Tracking preferences through the user-friendly setup interface.

Check the "Enable Case Tracer History" option to activate the feature and then select the actions you'd like to track.

- **Track Tracer clear:** A history record will be generated upon clearing a flag, displaying the precise date and time when a user responded to a Case.
- **Track Tracer flag set:** A history record will be generated upon setting a flag, indicating the date and time when a Case was created.
- **Track Case Ownership changes:** A history record will be generated, documenting the precise date and time when ownership of a Case was transferred, either from a user or a queue.
- **Track Case Status changes:** A history record will be generated, capturing the specific date and time when a Case Status was altered, providing insight into the duration the Case spent in each status.

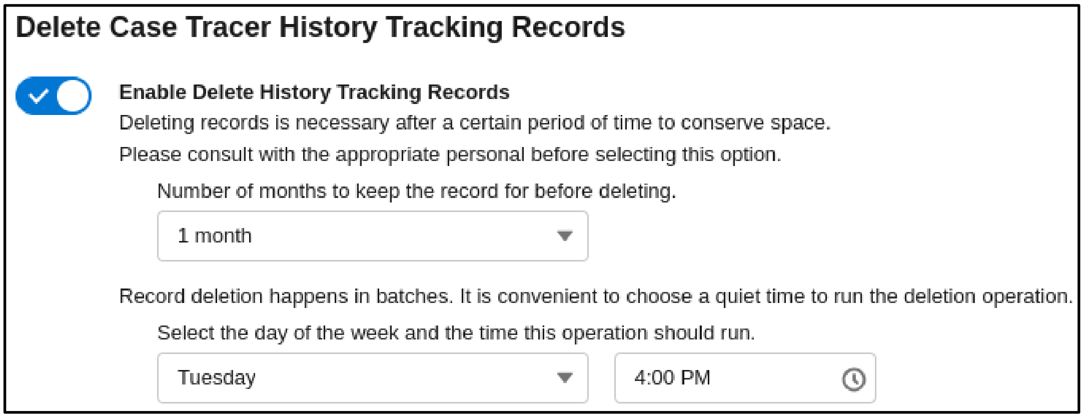


- In addition to the options mentioned above, Case Tracer enables you to conduct history tracking on any standard or custom field linked to the Case object. Case history records will be created when the value of the selected fields has changed.

5.2. Delete "Case Tracer History Tracking" records:

Automatically Delete Historic Case Tracer History Tracking Records:
The records created with this setting accumulate over time based on your Organization's Case volume and the number of interactions per Case.

Considering your organization's data storage capacity, we provide you with the option to define the time duration during which Case Tracer History Tracking records should be retained before undergoing automatic deletion.



Once this setting is activated, the automatic deletion of records occurs via a backend batch job. You have the flexibility to designate the day of the week and the time when the batch job should run in your organization. Your Org's locale is respected for this setting.

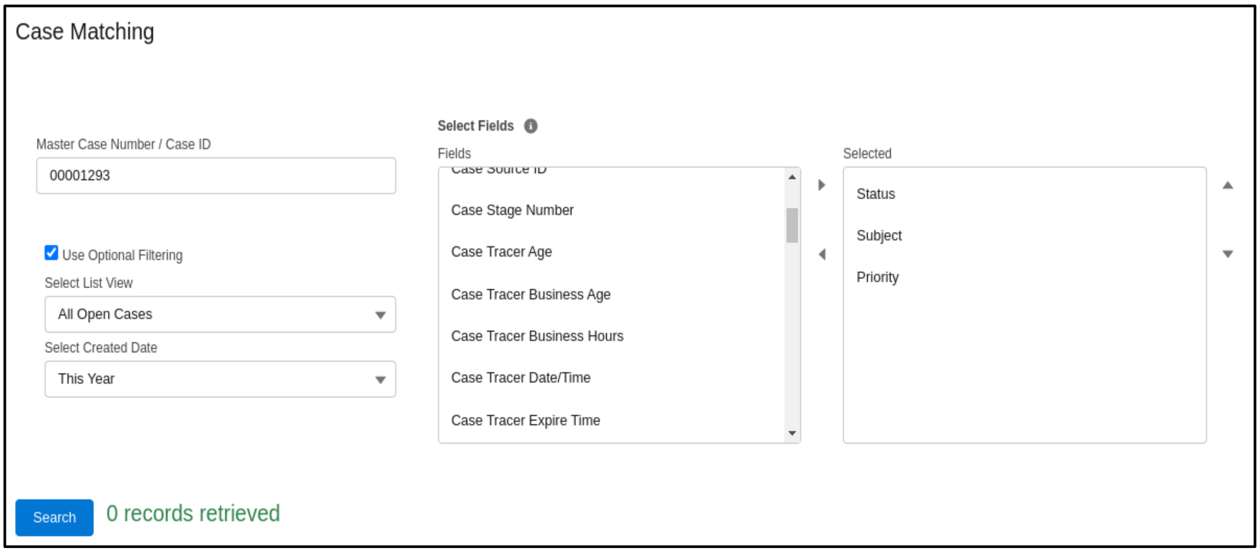
Delete history tracking records using scheduled jobs:

- When the admin wants to delete the history tracking records, that were created earlier, based on the age of the record, on a specific day & time. The admin has to enable the "Enable Delete History Tracking Records" and select a specific period to automatically delete the records.
- All the "Case Tracer History Tracking" records will be deleted automatically at the specific time using scheduled jobs.

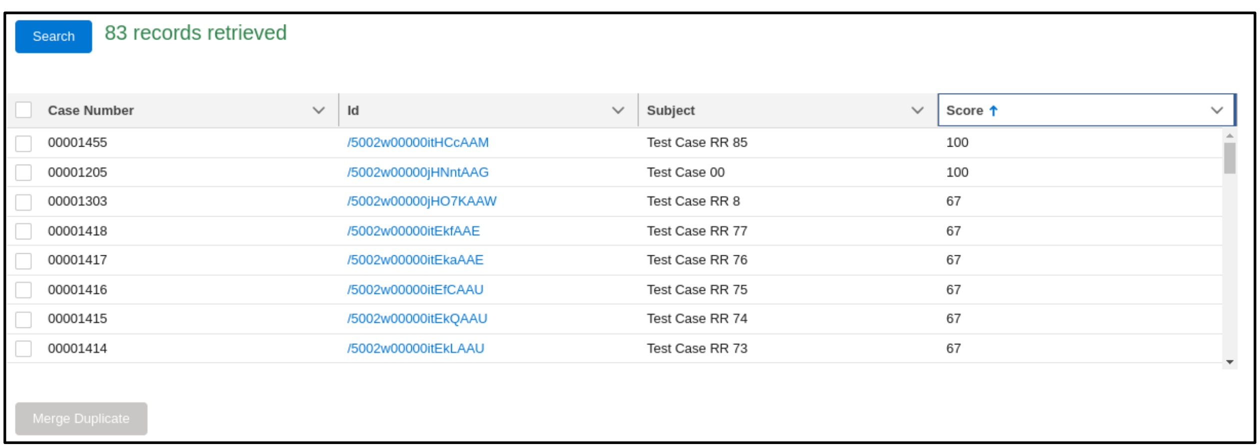
6. Case Matching and Case Merging

Find similar case records for a particular case record and merge those duplicate records with the master case.

1. Choose a case record as a master case. Then select fields from the Dual list for case record matching (up to 10 fields). List view and/or Created date optional filtering is also available. Press the Search button.

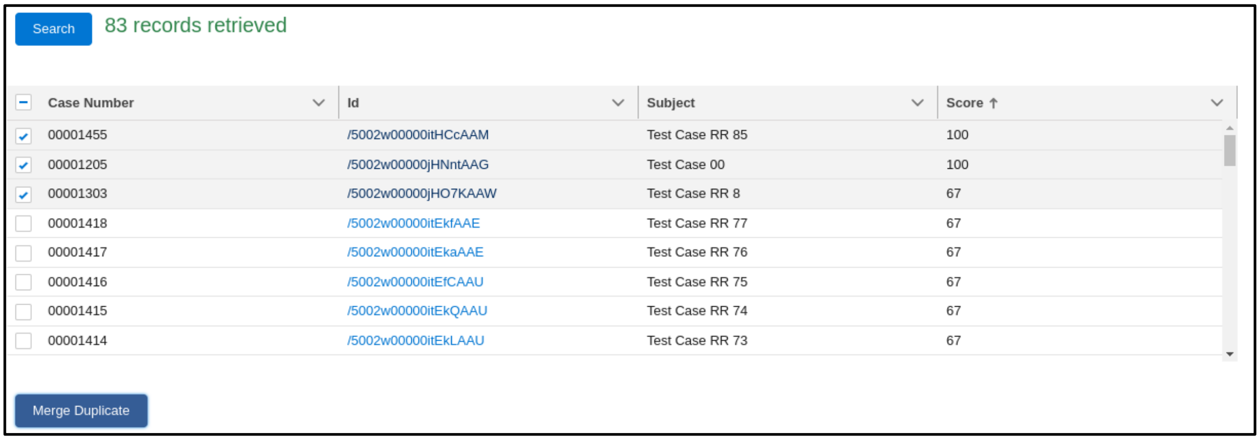


2. Similar Case records are shown.

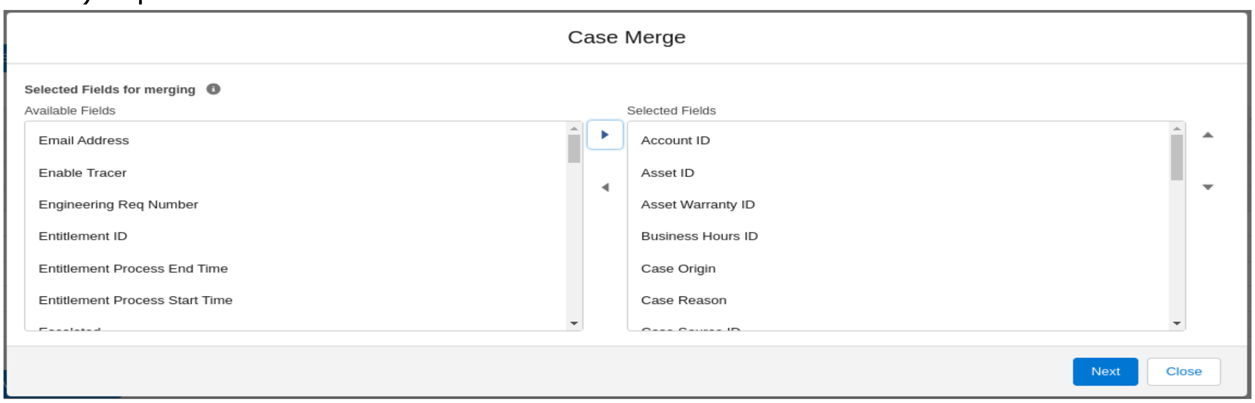


Case Number	Id	Subject	Score
00001455	/5002w00000itHCcAAM	Test Case RR 85	100
00001205	/5002w00000jHNntAAG	Test Case 00	100
00001303	/5002w00000jHO7KAAW	Test Case RR 8	67
00001418	/5002w00000itEkfAAE	Test Case RR 77	67
00001417	/5002w00000itEkaAAE	Test Case RR 76	67
00001416	/5002w00000itEfCAAU	Test Case RR 75	67
00001415	/5002w00000itEkQAAU	Test Case RR 74	67
00001414	/5002w00000itEkLAAU	Test Case RR 73	67

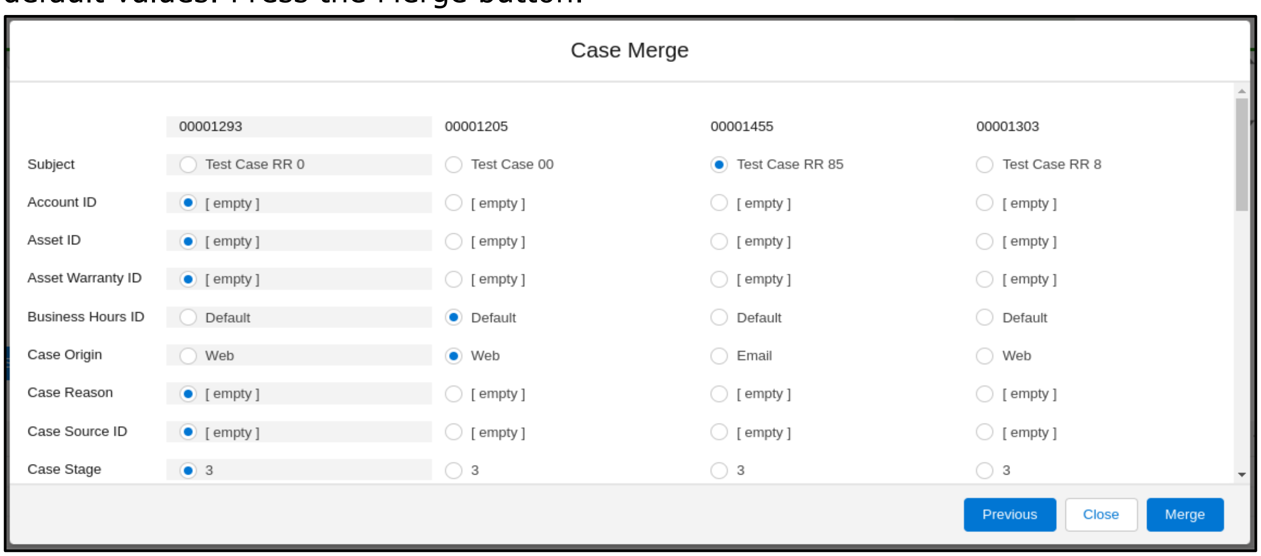
3. Select up to 3 records for merging & press the Merge Duplicate button.



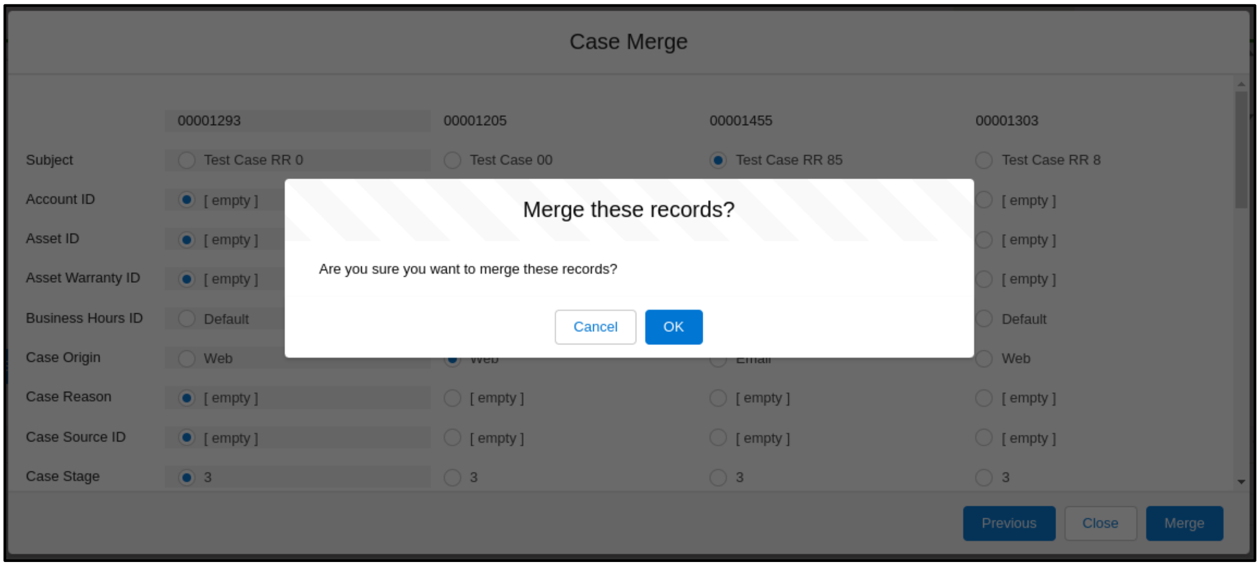
4. A popup will open, select fields from the Dual list for case merging (up to 35 fields) & press the Next button.



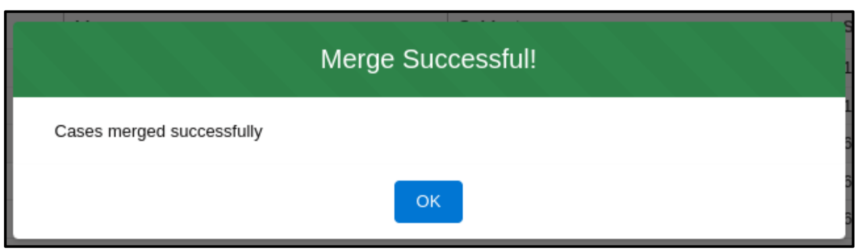
5. A comparison table is shown, where all the selected cases are compared with the master case using only the selected fields for merging child cases with the master case. Select any or all field's values from any child cases or keep default values. Press the Merge button.



6. A pop-up appears to confirm the merging. Confirm the **Ok** button to proceed successfully.



7. **Merge Successful!** message will be shown after successfully merging.



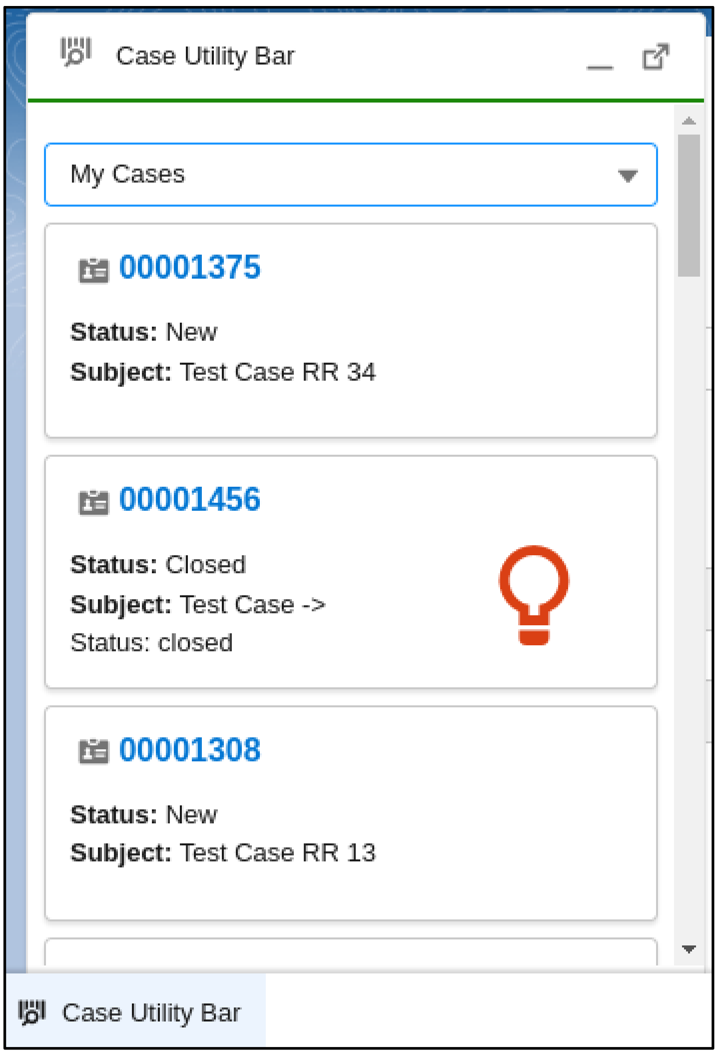
8. Related records will be displayed under the parent Case Related Cases after merging those records and a **{Merged}** text is added to all these child records before the Subject Name.

7. Utility Bar

The Case Tracer Utility Bar Lightning component simplifies case tracking for agents and support team managers in Salesforce. It offers a user-friendly way to visualize ongoing staged cases, organized by the running user's owned cases and Queues.

The Case Tracer Utility Bar component shows the current stage icon and can be accessed from any record or page within the Case Tracer Lightning App.

The utility bar is in the bottom left corner of the Case Tracer app.



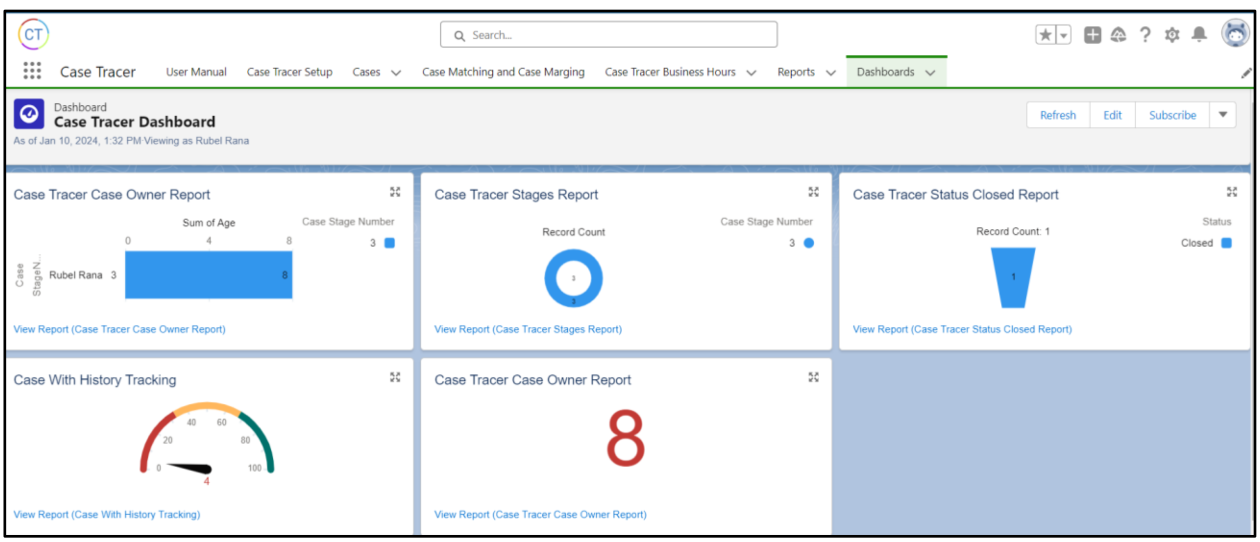
8. Reports and Dashboard

We have included sample reports and a dashboard to get you started. Feel free to clone and modify them to suit your needs.

Reports: Navigate to the standard **Reports** tab, where you will find a report folder titled **Case Tracer Reports**. In it, you will find the following:

- **Case Tracer Case Owner Report:** This report shows all cases that are grouped by **Case Owner**.
- **Case Tracer Stages Report:** This report shows all cases that are grouped by **Case Stage Number**.
- **Closed Cases Group By Owner:** This report shows all closed cases that are grouped by **Case Owner** and **Case Stage Number**.
- **Case With History Tracking:** This report shows all cases and "Case Tracer History Tracking" records that are affiliated with each case.
- **Case Tracer Status Closed Report:** This report shows all closed cases.

Dashboard: Navigate to the standard **Dashboards** tab, where you will find a dashboard folder titled **Case Tracer Dashboard**. In it, you will find a dashboard. This is a simple dashboard created by using the existing 5 reports:



9. Free vs Premium version features

Free Edition: Users have limited Save functionality in Case Tracer Setup, Case tracking starts based on predefined values, limited Case History tracking, and merging up to three Case records.

1. **Session Timer:** Limited access to track a case when a support agent spends time on a case.
2. **Case Tracer Setup:** Save button is disabled to prevent users from making any new changes.
3. **Recommended Response Time:** Users can track only a Case based on the predefined fixed value from setup.
4. **Case Tracer History Tracking:** Users can only track changes to the Case Status field.
5. **Delete Case Tracer History Tracking:** The system only deletes the Case Tracer History Tracking records at the predefined set value.
6. **Case Matching and Case Merging:** The user can merge up to three Case records.
7. **Utility Bar**

Paid Edition: Users have full access to Case Tracer Setup, allowing case tracking based on user-defined values, tracking Case history for all fields, and the ability to merge 10 or more case records simultaneously based on specific criteria.

1. **Session Timer:** Full access to track a case when a support agent spends time on a case.
2. **Case Tracer Setup:** Users can save and define settings based on their requirements.
3. **Recommended Response Time:** Users can track a Case based on the user-defined value from setup.
4. **Case Tracer History Tracking:** Users can track all standard and custom fields of the Case object.
5. **Delete Case Tracer History Tracking:** The system deletes the Case Tracer History Tracking records at the user-defined set value.
6. **Case Matching and Case Merging:** The user can merge up to 10 or more Case records.
7. **Utility Bar**
8. **Reports and Dashboard**

Note: For premium features, the app is not available yet in AppExchange. For more information, please check this site: https://appexchange.salesforce.com/appxConsultingListingDetail?listingId=0bf6de2c-2dbe-43c8-a2e6-826151917ad5&legacy=true