

Support360 - Release Notes

Version: 0.1 (Beta 1)

Release Date: May 12, 2025

Package ID: 04tgK00000029LIQAI

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Installation

Install Support360 in your Salesforce org using this link:

[Install Support360](#)

Package Components

Custom Objects

- Project__c
- Resource_Allocation__c
- User_Story__c

Custom Fields

Case Object

- Project__c (Lookup)
- Resolution__c (Long Text Area)
- Due_Date__c (Date)
- Approval_Status__c (Picklist)
- Approval_Comment__c (Text Area)
- Due_Date_Reminder_Sent__c (Checkbox)
- Overdue_Notification_Sent__c (Checkbox)

User Object

- Availability_Percentage__c (Number)

Lightning Web Components

- pathComponent_Custom
- pathComponentModalCase
- resourceAllocationComp
- resourceAllocationModal
- changeProjectManager

Apex Classes

- CaseApprovalEmailService
- CaseApprovalProcessor
- CSVGenerator
- ProjectManagerController
- QueueLabelController
- ResourceAllocationController

Flows

- [Case] Auto Closed Once Tasks are done
- [Case] Due Date Check Schedule Flow
- [Case] Generate CSV Files for the Over-Due Cases
- [Case] Status Update Notification To Team
- [Project] Initiate the Change Manager Process
- [Resource Allocation with User] Automatically update the User's data

Email Templates

- Case_Approval_Request
- Case_Outcome
- Send_Due_Date_Email_Alert

Reports & Dashboards

Reports

- Average Case Resolution Time by Owner
- Case Backlog by Priority and Status
- Cases by Priority Analysis
- Cases by Status
- Change Requests by Project
- Completed Cases by Project
- In Progress Cases by Project

- Overdue Cases Analysis
- Project History Tracking
- Resource Allocation Analysis

Dashboards

- Case Trends Dashboard
- Project Performance Dashboard
- Support Team Homepage Dashboard

Pre-Deployment Configuration

1. System Requirements

- Salesforce Enterprise Edition or above
- API Version 62.0 or later
- Lightning Experience enabled

2. User Setup

1. Create following Profiles:
 - Project Manager
 - Senior Manager
 - Team Member
2. Configure Permission Sets:
 - Project Manager Additional Permissions
 - Senior Manager Additional Permissions
 - Team Member Additional Permissions
3. Create Queues:
 - Development Team
 - Quality Assurance Team
 - Support Team
 - Buffer Team
 - Managers

3. Email Service Configuration

1. Configure Email Service for Case Approval:
 - Navigate to Setup → Email Services
 - Create new Email Service using CaseApprovalEmailService
 - Generate Email Service Address
 - Update Email Templates with generated address

Post-Deployment Steps

1. Activate Flows

- Activate all packaged flows in Flow Builder
- Verify flow versions and update any references if needed

2. Configure Custom Notifications

1. Setup Custom Notification Types:
 - Case Due Tomorrow Reminder
 - Status Update Change Notification
 - Custom Notification

3. Queue Configuration

1. Add members to queues:
 - Assign users to appropriate teams
 - Configure queue email settings
 - Set queue visibility
 - Make sure the API name Ends with _Team
 - For Example: HR_Team, Support_Team etc

4. Dashboard Setup

1. Configure dashboard refresh settings
2. Share dashboards with appropriate users/roles
3. Set running user for dashboards

5. Validation Steps

1. Verify Case Path component functionality
2. Test approval process email responses
3. Confirm resource allocation calculations
4. Check notification deliveries
5. Validate report accessibility

Known Limitations

1. **Email Approval Process**
 - Multiple approvers must use the Salesforce UI for approval actions
 - Email replies are limited to single approver scenarios
2. **Resource Allocation**
 - Maximum allocation percentage per user is 100%
 - Resources can only be allocated in whole number percentages
3. **CSV Generation**
 - Files are stored for 30 days before automatic deletion
 - Maximum file size: 5MB