Case InsAIghts - AppExchange Test Guide

Test Case Details

Below are the details to test the Case InsAIghts application in Salesforce.

• **Case Number:** 00001026
• **Case ID:** 500gL00000PDc2fQAD
• **Case Type:** Onboarding
• **Salesforce Case Link:** 00001026
https://orgfarm-bf7d6ebd89-dev-ed.develop.lightning.force.com/lightning/r/Case/500gL00000PDc2fQAD/view

• **Salesforce Case Workflow Link:** CP-0000
https://orgfarm-bf7d6ebd89-dev-ed.develop.lightning.force.com/lightning/r/CaseInsAIghts__Case_Process__c/a03gL00000H4s9hQAB/view

Note: The Case Workflow and Steps for 'Onboarding' are already configured. You can use the existing setup or create your own workflow for testing. To create your own case workflow and steps, refer to the Post Installation Steps document.

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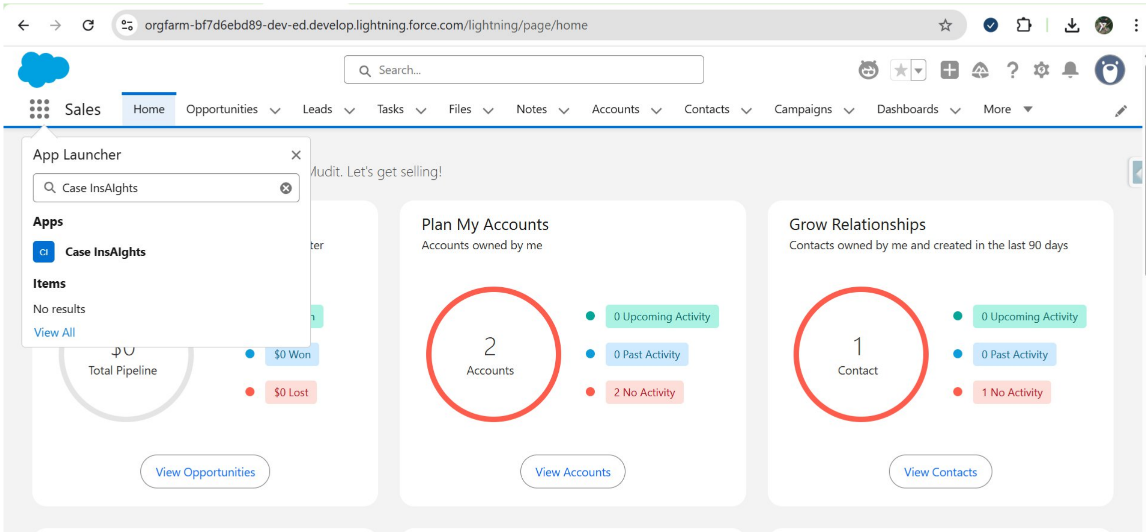
This document provides step-by-step instructions for the AppExchange team to test the Case InsAIghts solution. If using the application for the first time, please ensure all prerequisite steps mentioned below are completed.

Step 1: Log into Salesforce Org

Log in to your Salesforce org using your credentials.

Step 2: Launch Case InsAIghts App

1. Click on the App Launcher (grid icon) at the top-left corner.
2. In the search bar, type “Case InsAIghts”.
3. Select the Case InsAIghts app from the results.
4. Open Case record, Case Number: 00001026.



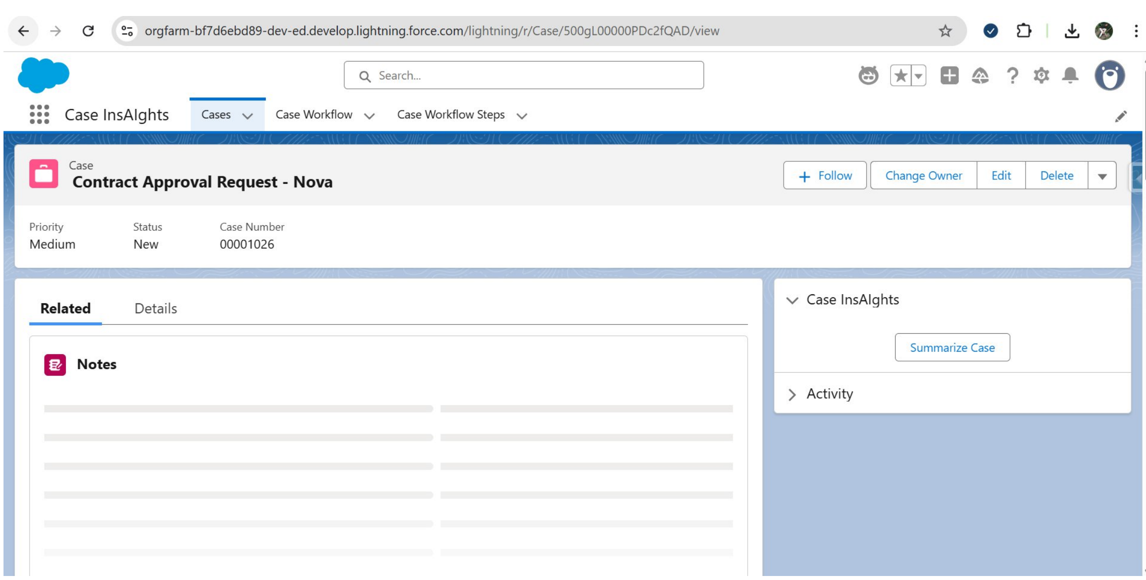
Step 3: Verify Case Workflow and Steps Configuration

Based on the Case Type, Case Workflow and Case Workflow Steps should be configured. If they are not configured, a warning message will appear on the right-hand side of the Case Detail page in the Case InsAIghts panel.

Step 4: Summarize Case

Once the Case Workflow and Steps are configured, a Summarize Case button will be visible. For the case to generate a proper summary, ensure there are related Emails, Tasks, or Notes linked to the case. Then click on Summarize Case.

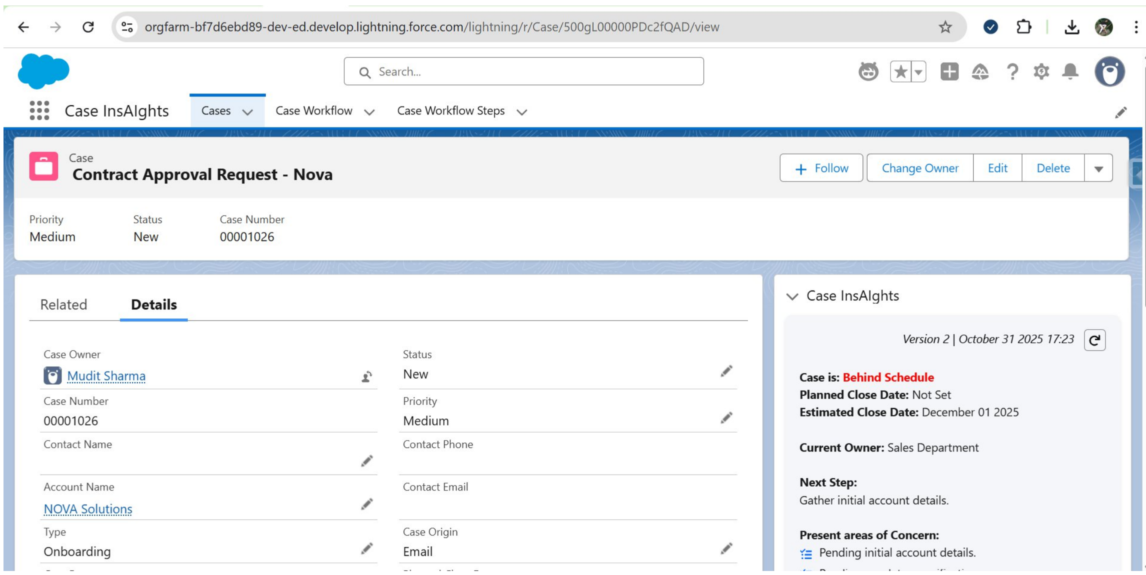
The summarization process may take approximately 30–45 seconds.

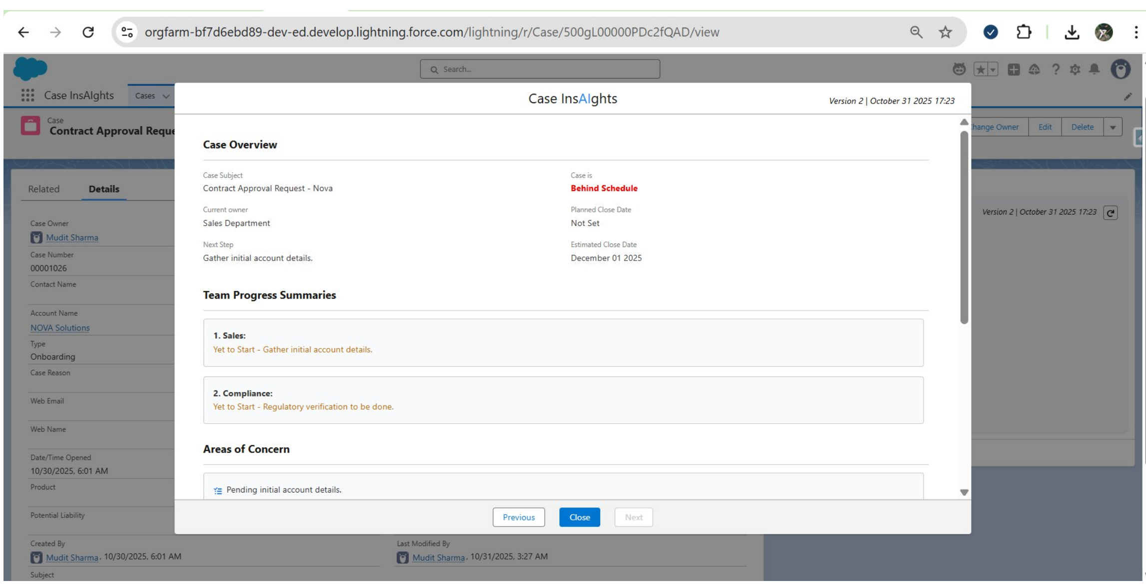


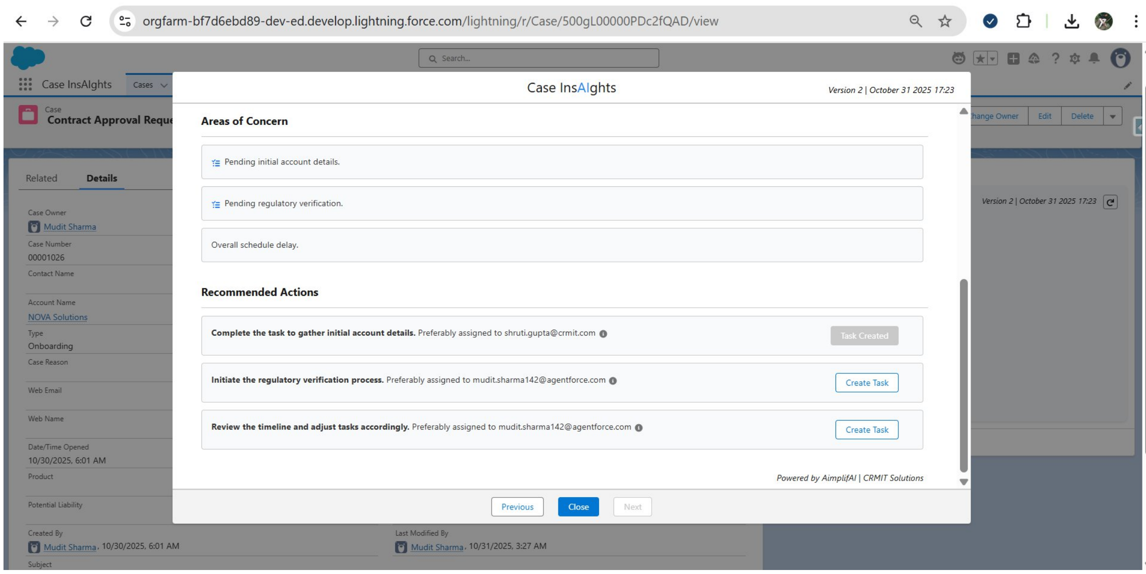
Step 5: View Generated Summary

Once the summarization is complete, the system will generate a case summary including:
- Next Steps
- Team Progress
- Areas of Concern
- Recommended Actions

This summary provides a quick overview of the case and assists in faster decision-making.







Continue on Existing Case (Regenerate Summary)

To continue working on an existing Case with an already generated summary:

1. Click on the Regenerate icon next to the version and date.
2. If no new activities (emails/tasks/notes) were added since the last summary, a confirmation popup will appear.
3. If there are new activities, the system will automatically regenerate a new summary with an updated version.