

Case InsAlghts - AppExchange Test Guide

Test Case Details

Below are the details to test the Case InsAlghts 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)
<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/CaseInsAlghts__Case_Process__c/a03gL00000H4s9hQAB/view)
https://orgfarm-bf7d6ebd89-dev-ed.develop.lightning.force.com/lightning/r/CaseInsAlghts__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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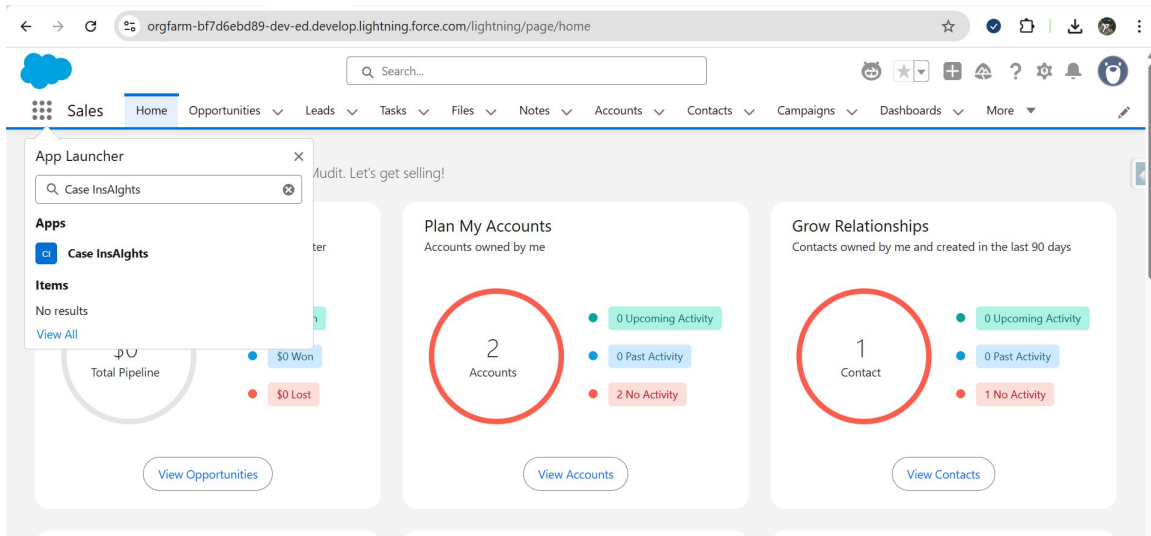
This document provides step-by-step instructions for the AppExchange team to test the Case InsAlghts solution. If using the application for the first time, please ensure all prerequisite steps mentioned below are completed.

Step 1: Log into Salesforce Org

Log in to your Salesforce org using your credentials.

Step 2: Launch Case InsAlghts App

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



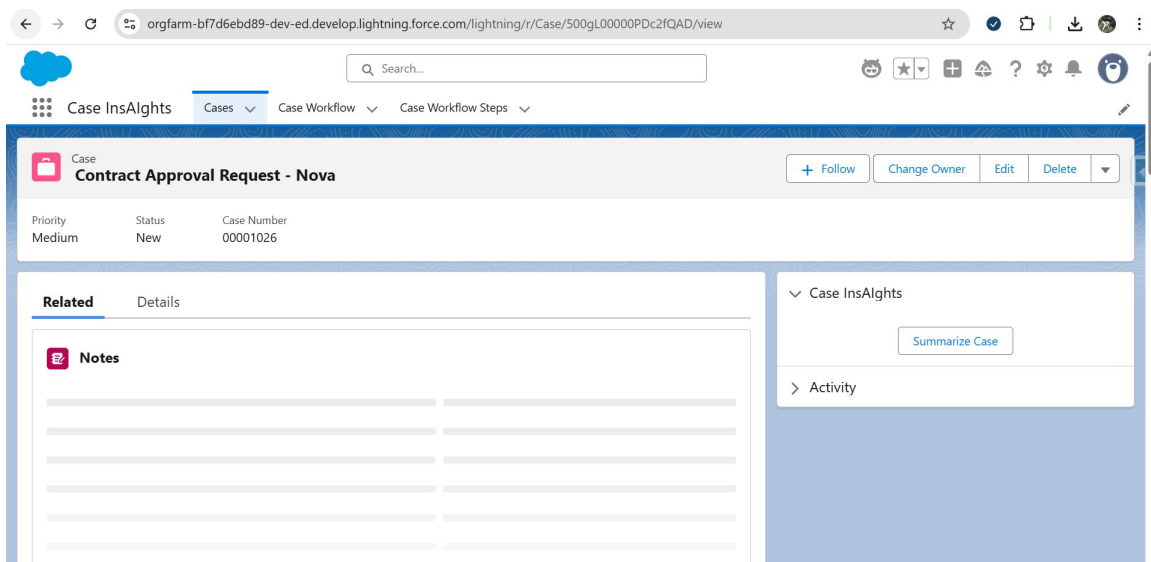
Step 3: Verify Case Workflow and Steps Configuration

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.

The image shows two screenshots of a Salesforce Lightning interface. The top screenshot displays a Case record for 'Contract Approval Request - Nova' with a status of 'New' and priority 'Medium'. The 'Case Insights' section on the right indicates the case is 'Behind Schedule' and provides a 'Planned Close Date' of 'Not Set' and an 'Estimated Close Date' of 'December 01 2025'. The 'Next Step' is 'Gather initial account details.' and the 'Present areas of Concern' is 'Pending initial account details.'

The bottom screenshot shows the 'Case Insights' modal window. It provides a detailed overview of the case, including the subject 'Contract Approval Request - Nova', current owner 'Sales Department', and next step 'Gather initial account details.' The modal also displays 'Team Progress Summaries' for Sales and Compliance, both marked as 'Yet to Start'. The 'Areas of Concern' section lists 'Pending initial account details.' The modal includes navigation buttons for 'Previous', 'Close', and 'Next'.

The screenshot shows the Salesforce Case InsAights interface. A modal window titled 'Case InsAights' is open, displaying 'Version 2 | October 31 2025 17:23'. The modal is divided into two sections: 'Areas of Concern' and 'Recommended Actions'.

Areas of Concern:

- Pending initial account details.
- Pending regulatory verification.
- Overall schedule delay.

Recommended Actions:

- Complete the task to gather initial account details. Preferably assigned to shrutigupta@crmit.com (Task Created)
- Initiate the regulatory verification process. Preferably assigned to mudit.sharma142@agentforce.com (Create Task)
- Review the timeline and adjust tasks accordingly. Preferably assigned to mudit.sharma142@agentforce.com (Create Task)

At the bottom of the modal, there are buttons for 'Previous', 'Close', and 'Next'. The background shows the Salesforce case details for 'Contract Approval Request - Nova'.

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.

The screenshot shows the Salesforce Case InsAights interface. A confirmation popup titled 'Confirmation' is displayed in the center. The popup contains the text: 'There are no new activities on this Case. Are you sure you want to regenerate the Case InsAights?'. Below the text are two buttons: 'Regenerate' and 'Cancel'.

The background shows the Salesforce case details for 'Contract Approval Request - Nova'. The 'Case InsAights' section is visible on the right, showing 'Version 3 | November 03 2025 15:09'. The case is marked as 'Behind Schedule' with a 'Planned Close Date: Not Set' and an 'Estimated Close Date: December 01 2025'. The 'Current Owner' is 'Sales Department' and the 'Next Step' is 'Complete the task to gather initial account details'.