

Case InsAIghts – Managed Package Installation & Setup Guide

1. Prerequisites

Before installation, ensure the following:

- You have System Administrator access.
- Case object is enabled (Service Cloud license recommended).
- API access and AppExchange installation permissions are available.

2. Package Installation Steps

1. Access the AppExchange listing for the Case InsAIghts.
2. Click Get It Now and select the target Salesforce org (Production/Sandbox).
3. Log in with your admin credentials if prompted.
4. Choose an installation type (Admins Only / All Users / Specific Profiles).
5. Approve the required access prompts.
6. Click Install and wait for completion.
7. Select Done to return to the Installed Packages page.

3. Post-Installation Permissions

Assign packaged permission sets:

- GenAI Admin
- GenAI User
- GenAI Case Insights

Navigate to Setup → Permission Sets → Manage Assignments.

4. Configure Case Workflows

Navigate to Setup → Custom Metadata Types → Case Workflow Types.

Create a new record:

- Workflow Name: Onboarding
- Applicable Case Type: Onboarding
- Active: Checked

5. Configure Workflow Steps

Create workflow steps under Custom Metadata Types → Case Workflow Steps:

1. Gathering Details
2. Regulatory Verification
3. Risk Management

6. Configure Case Teams

Navigate to Setup → Case Team Roles and create roles:

- Onboarding Analyst
- Compliance Officer
- Risk Manager

Assign one member per workflow step.

7. GenAI Summarization & Insights Configuration

Explained in Post deployment Steps

8. Final Verification

Validate by creating an Onboarding case and ensuring workflow steps appear.

Assign case team members.

Verify Case Insights.