

Case Dashboard APP

Show Cases information in different type of reports in lightning.

USER MANUAL

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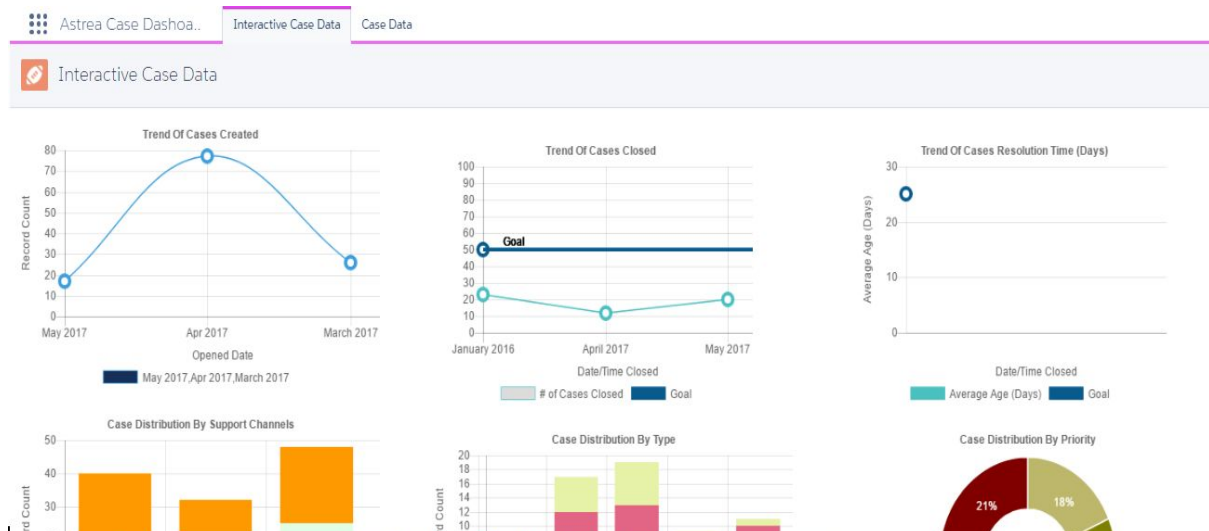
Case Dashboard App

We have build custom data visualization components in Lightning Experience using chart.JS library. It provides comprehensive insight into organization, team, and individual performance for Services and support team. It Increases the effectiveness of sales and service organizations.

The Dashboard in our app displays many reports using various components. These lightning components which dynamically fetch data from Case Object and represent them on charts and can be added on the detail page of Account, Lead, Opportunity, Case, etc. We have created 30 such components which displays different scenarios depending on Cases object. These Dashboards can work on Community even when the community License doesn't support dashboards.

Key Features:

1. Easily monitor Case record data using Case Dashboard App.
2. We can see different scenarios of Case Record in different Reports.
3. Using these components we can display Lightning Dashboard to any Standard or Custom Object's **Detail Page in lightning**.
4. We can use these Dashboard in the **community**. Also we can add the individual components for each report on different pages in community.
5. We can also use this app in Salesforce1 mobile app.

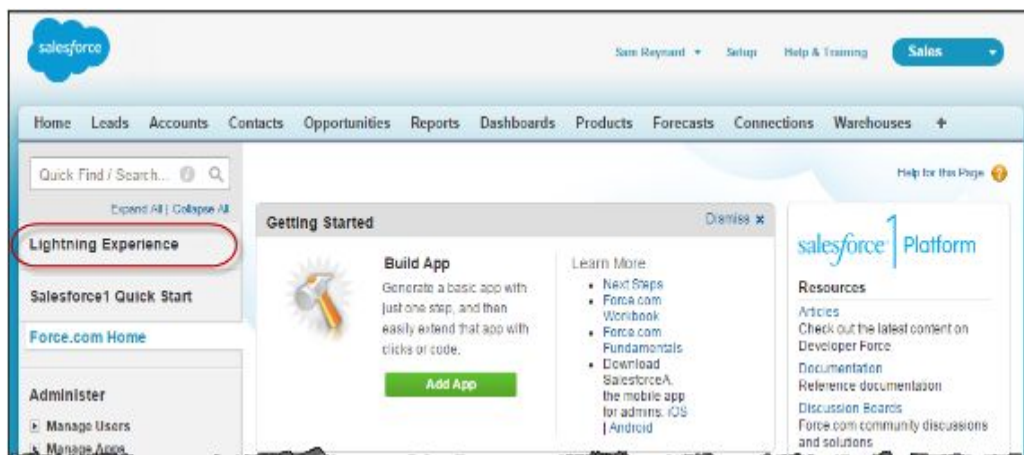


Steps to use Case Dashboard App:

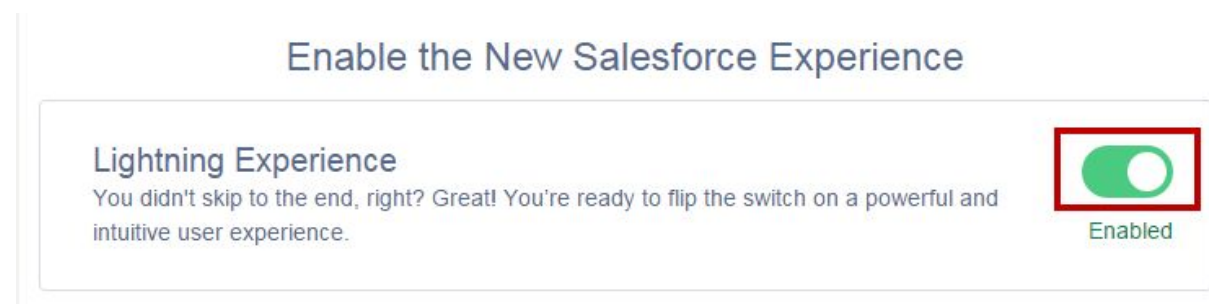
- 1) **Enable Lightning Experience:** if lightning experience is enabled in your org then you can skip 1 step and go to step 2.

Now, let's get Lightning Experience enabled in your org.

- In the upper right corner click Setup, and then in the upper left corner click Lightning Experience.



- Scroll down to the bottom of the page and next to Lightning Experience, click the slider button. The slider button should update to Enabled.



- You get a stern warning that's mostly aimed at administrators, so for this quick start; you can ignore this by clicking Finish Enabling Lightning Experience.
- Your browser should automatically refresh, but if not, give it a little kick.

That's it! You've enabled Lightning Experience.

2) Switch between Salesforce Classic and Lightning Experience:

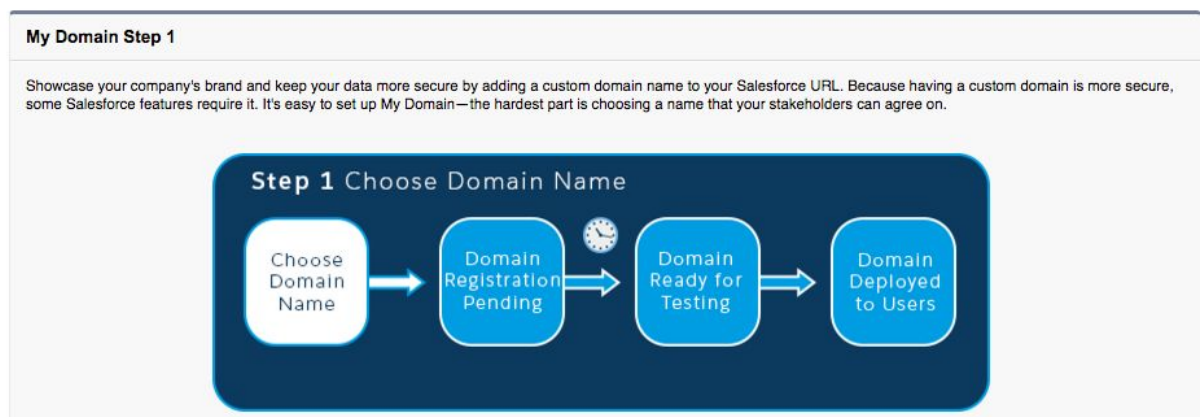
- Now, click your name in the upper right corner. You should now see Switch to Lightning Experience in the menu. This feature is called the Switcher. It allows each user to switch back and forth between Lightning Experience and the previous user experience, Salesforce Classic, on demand.



- 3) Before Installing App from AppExchange, Set up a Custom Domain name for your org.
Go To Setup > My Domain

My Domain

Help for this Page ?

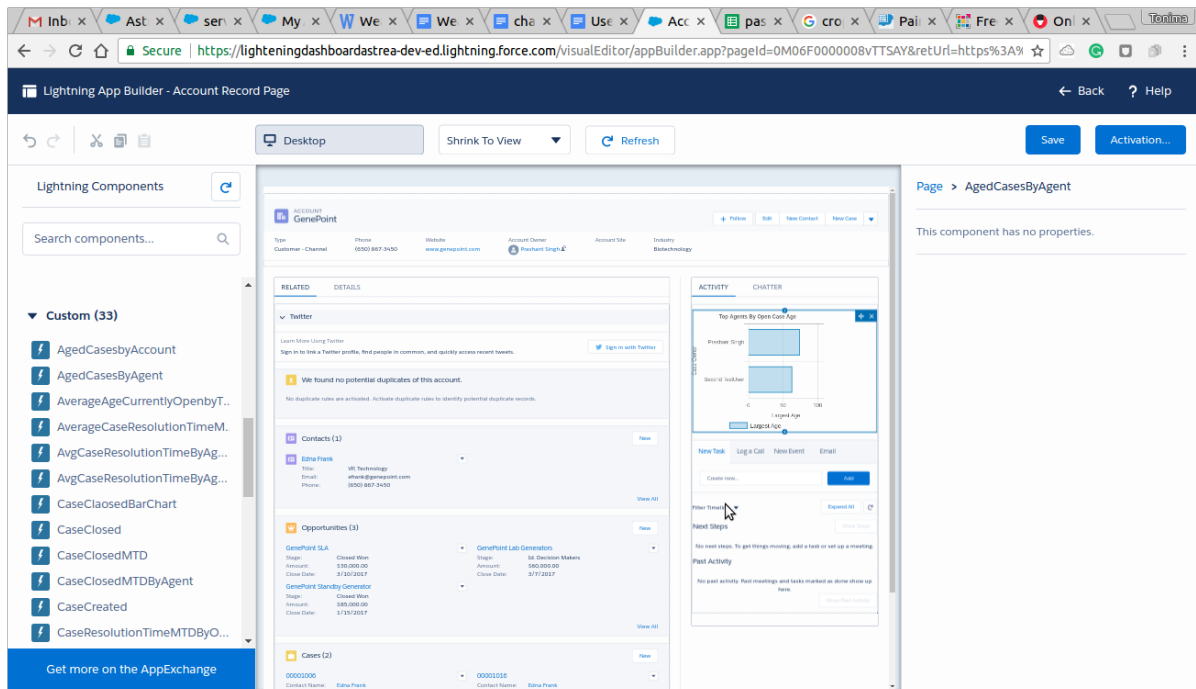


- App includes two tabs: 1) **Interactive Case Data**, 2) **Agent Supervisors**.

5) Use these components in Detail Page. After complete all four steps your domain name is ready to use.

6) Install Case Dashboard App from AppExchange:

- To start Case Dashboard App after install app from App Exchange click on **App Launcher** and select “**Astrea Case Dashboard**” app.
- To start using “Case Dashboard App” lightning component, the first step is to add the component to page Layout
- Click on the setup sign on the home page and select “Edit Page”.



- Drag component to any place.
- Click “Activate” and “Save”.

7) Add Components to Community:

- Create community > Builder > Components > Custom Components
- Drag any component to page layout.

