

Astrea Case Close

Lightning Component

Close your Cases in a few clicks in Lightning Experience

USER MANUAL

Astrea IT Services Pvt Ltd

C-52, Sector 65 Noida, UP- 201301

www.astreait.com



Astrea Case Close User Manual

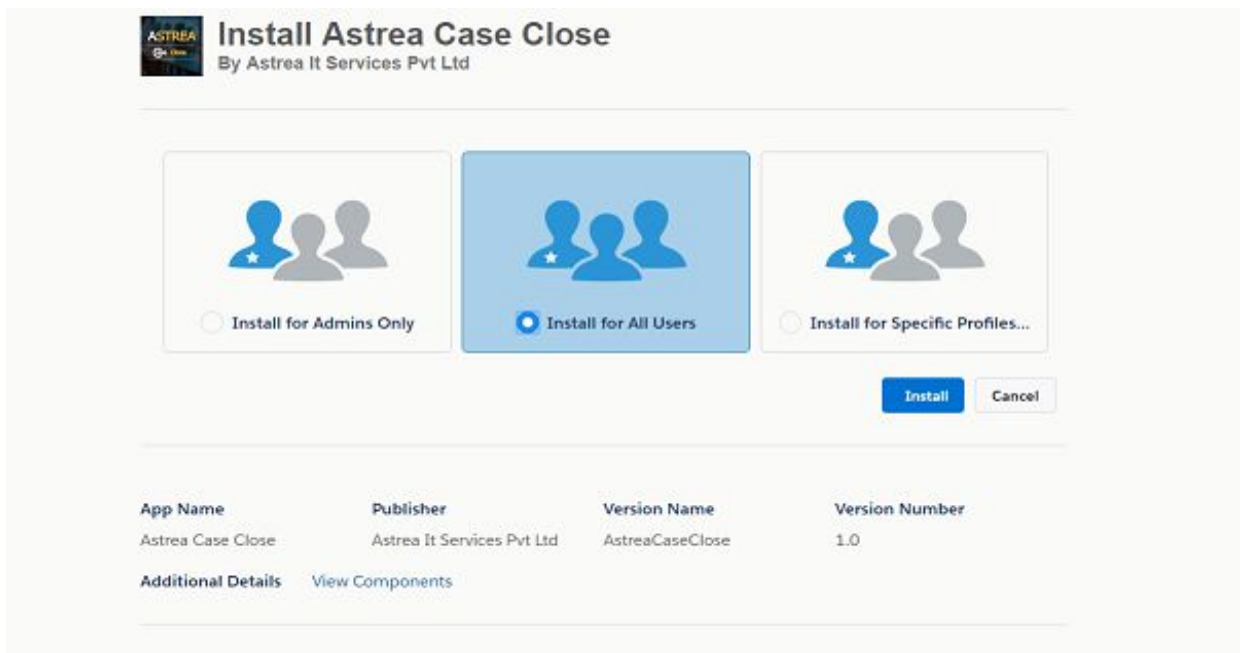
- **Component Overview**

Astrea Case Close is a Salesforce native Lightning component. The component is used to close the Cases in a Salesforce instance. This component emulates the Salesforce Classic functionality of providing a different layout for Close Cases. The component supports point and click graphical user interface which is very simple and easy to use.

Note: A custom domain name in Salesforce Org is required for a Lightning component to work successfully.

- **Steps For Installation**

- Install CaseClose Package. Select Install for All Users and then click on **Install** button.



- After the package is successfully installed, the user gets the following screen:

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	CaseClose	Astrea IT Services	1.0	CaseClose	4/17/2018 8:02 AM	✓	0	0	0

- Steps to add the Component on the **Case Detail Page**.

Add the new Lightning Quick Action by following these Steps:

- Go to **Setup > Object Manager > Case > Button, Links and Actions** the following screen will appear.



- Click on **New Action** button.

- Enter the action information by selecting the Lightning Component in Action Type, **CaseClose: caseclose** in Lightning Component.

- Enter the Label as **CaseClose**.

Edit Case Action
CaseClose

Help for this Page ?

Enter Action Information

Save Cancel

Object Name Case

Action Type Lightning Component

Lightning Component CaseClose:caseClose

Height 250px

Standard Label Type --None--

Label CaseClose

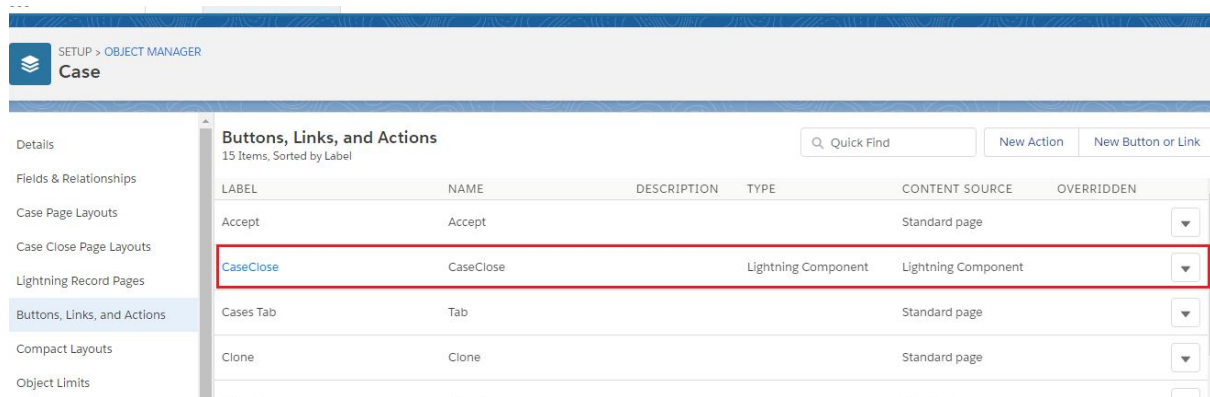
Name CaseClose

Description

Icon Change Icon

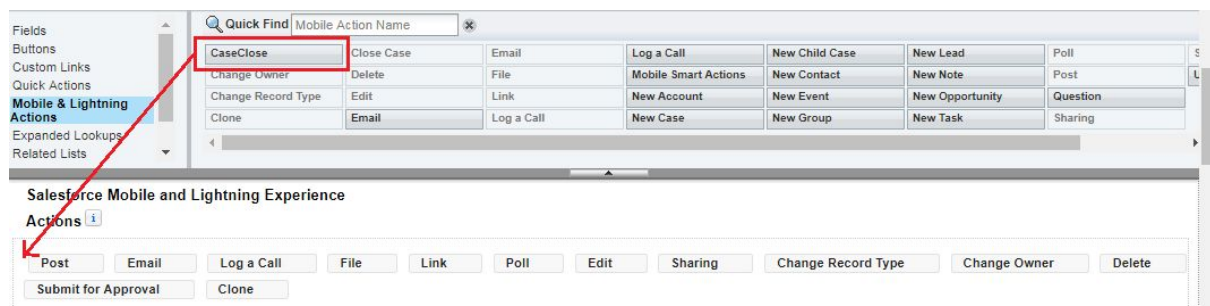
Save Cancel

- Click on **Save** button to save the changes made.

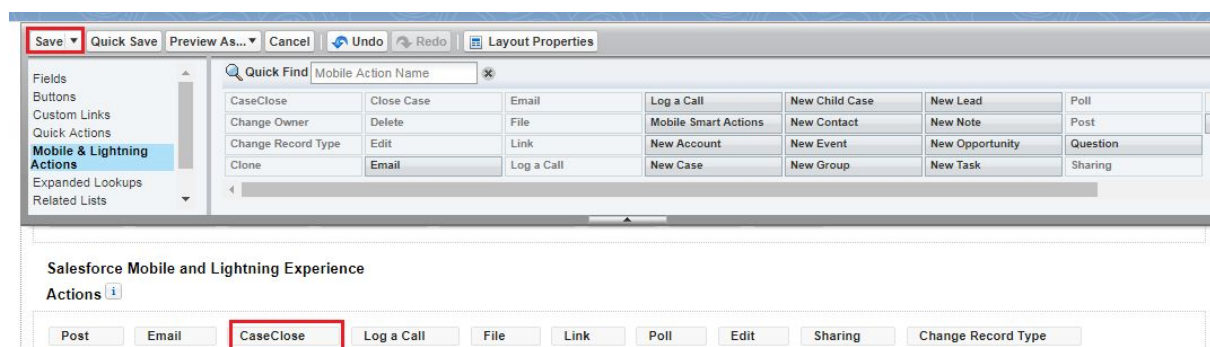


Now the CaseClose quick action needs to be added in the 'Button, Links and Actions' section of Case SOBJect.

- Steps to add the CaseClose quick action on Case Page Layout.
 - Go To **Setup > Object Manager > Case > Case Page Layouts > Case Layout**.



- Drag the CaseClose quick action to Mobile & Lightning Actions Section.



- Click on **Save** Button.

Case Close Component Functionality:

- To change the status of cases to “Closed”, follow these steps:
 - a. Click on **CaseClose** quick action on Case’s detail page, the lightning component will be displayed.

The screenshot shows the Salesforce Lightning interface for a case titled "TestClose1". At the top, there are tabs for "CHATTER" and "RELATED". Below these, a navigation bar contains several quick actions: "Post", "Email", "CaseClose", "Log a Call", and "Poll". The "CaseClose" quick action is highlighted with a red box, and a red arrow points to it with the text "Lightning Quick Action". Below the navigation bar, the "Close Case" component is displayed, which is part of "Astrea's Lightning Component". It includes a "Case Information" section with two required fields: "Status*" and "Case Reason*", both currently set to "--None--". Below these fields is an "Internal Comments" section with a large text area. At the bottom of the component is a blue button labeled "Close Case".

- b. Enter the Case Information.
- c. Here the **Status** and **Case Reason** are required fields and **Internal Comments** is an optional field.

TestClose1

CHATTER

RELATED

PostEmailCaseCloseLog a CallPoll

Close Case

Astrea's Lightning Component

Case Information

Status*--None--Case Reason*--None--

Required Fields

Internal Comments

Close Case

d. Select the values for **Status** and **Case Reason** from the Picklist.

TestClose4

CHATTER

RELATED

PostEmailCaseCloseLog a CallPoll

Close Case

Astrea's Lightning Component

Case Information

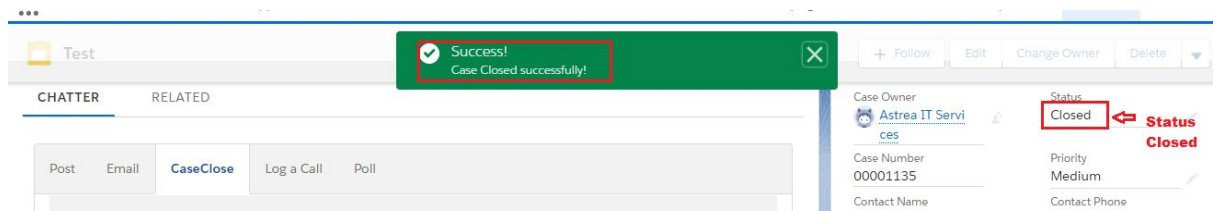
Status*ClosedCase Reason*Performance

Internal Comments

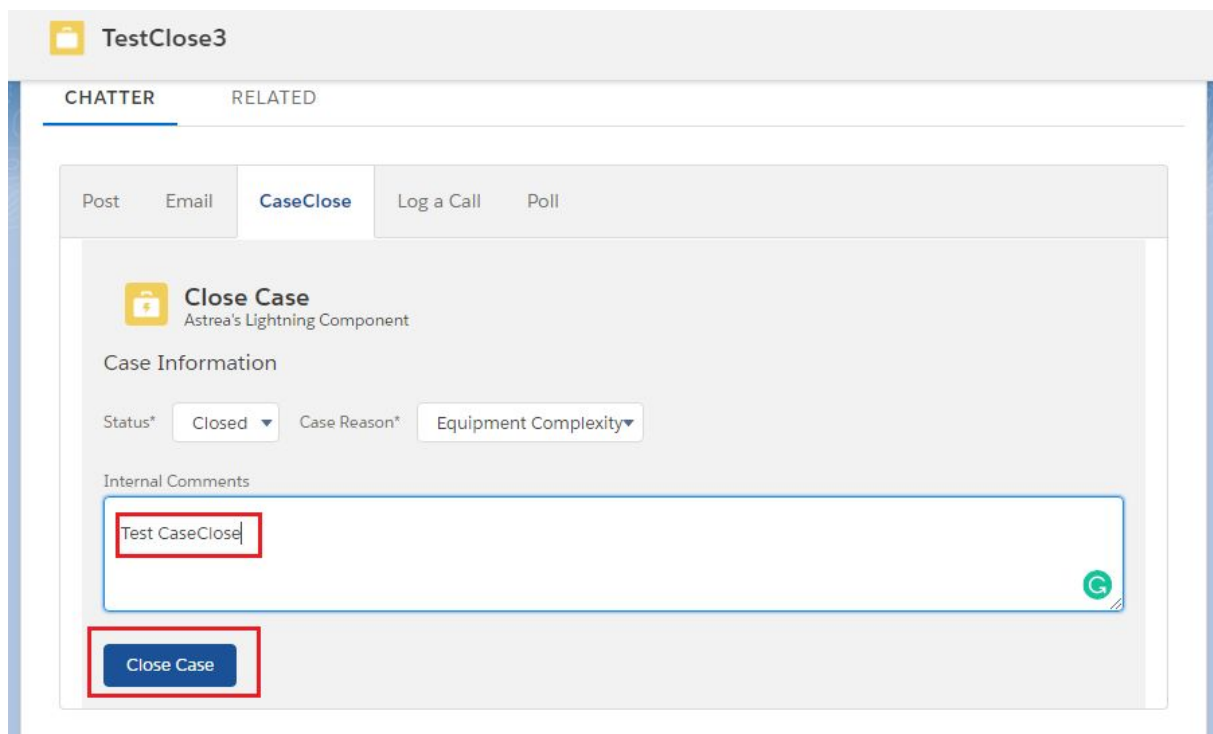
Close Case

e. Click on **Case Close** button.

f. After clicking on **Case Close** button, a **Success** message will be displayed and Status of the selected Case changes to “**Closed**”.



g. While closing the Case if user enters the **Internal Comments**, a new Comment record will be created related to the Case.



CHATTER

RELATED

Related Cases (0)

New

Open Activities (0)

New Task

New Event

Activity History (0)

Case Comments (1)

New

USER	CREATED DATE	COMMENT
 Astrea IT Services	4/17/2018 10:37 PM	Test CaseClose

Case Owner

 [Astrea IT Servi](#)
[ces](#)

Case Number

00001148

Contact Name

Account Name

Type

Case Reason

Equipment Design

nooftask

Web Email

Status

Closed

Priority

Medium

Contact Phone

Contact Email

Case Origin

Parent Case

Web Company