

Case Ownership

Lightning Component

USER MANUAL

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OVERVIEW

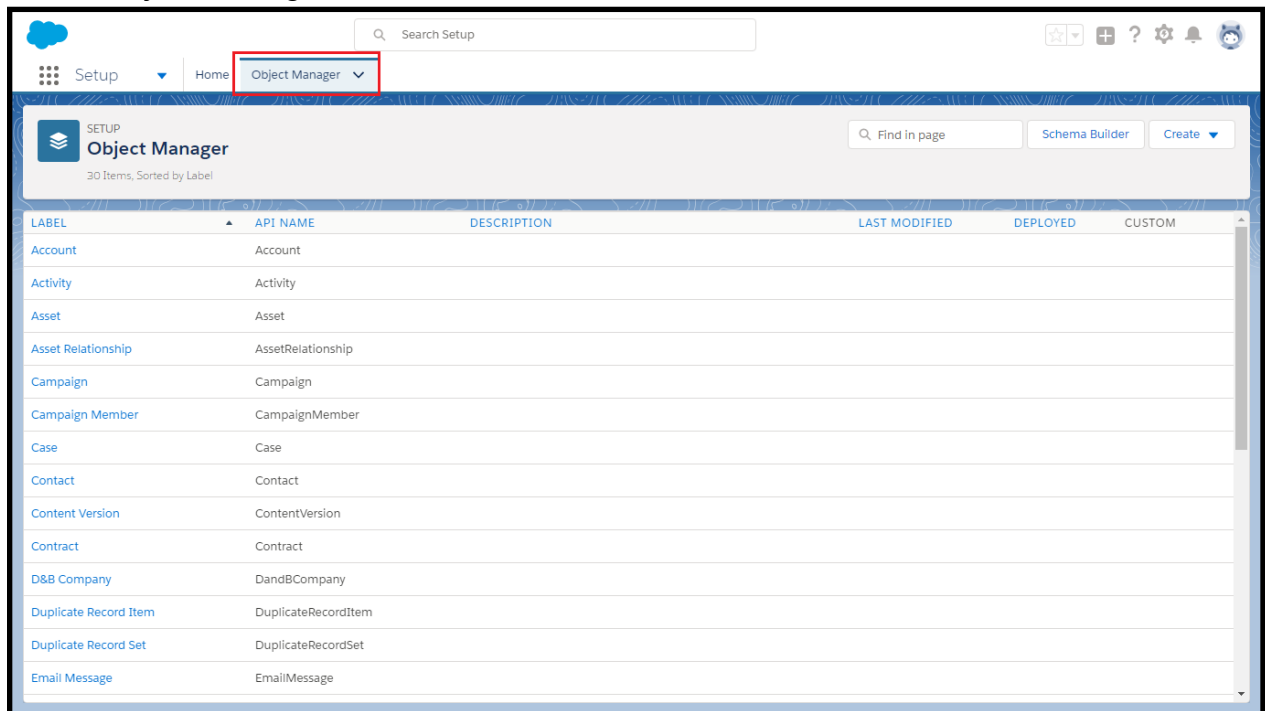
Case Ownership is a lightning component used to change the Ownership when user clicks on the Action button(this is a replica of classic version).

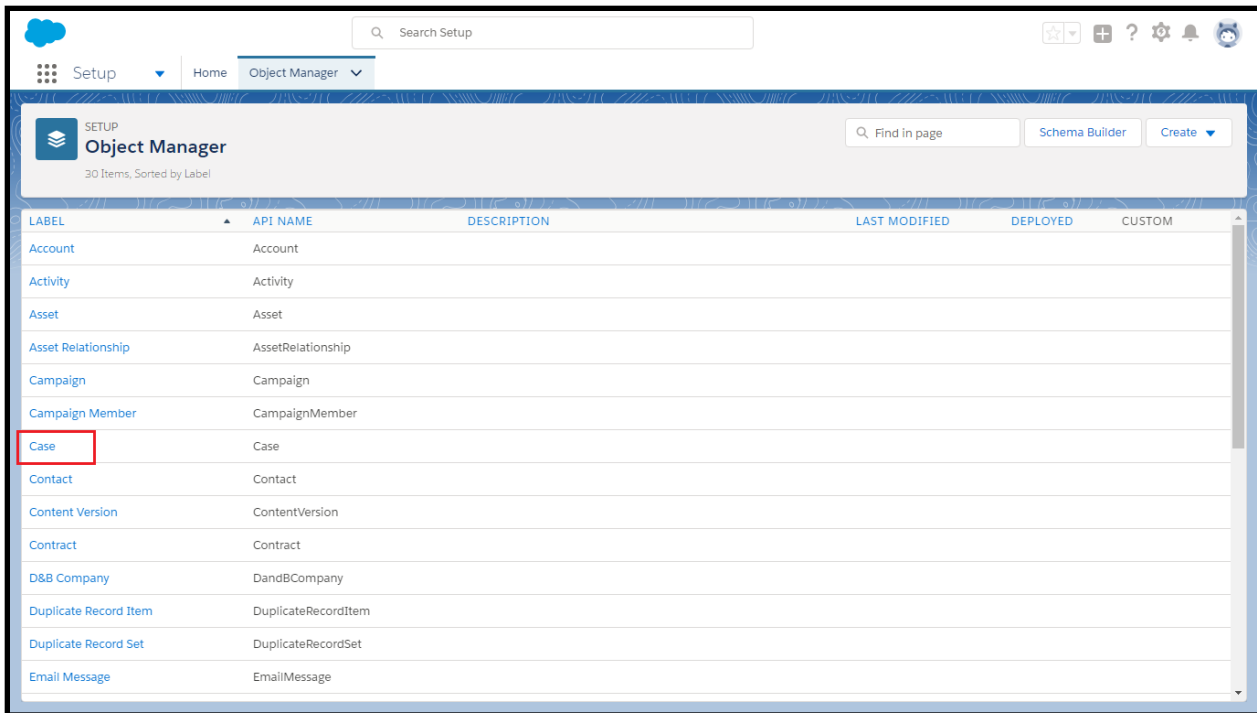
KEY FEATURES

Change the Case owner of the selected cases to the Logged in user.

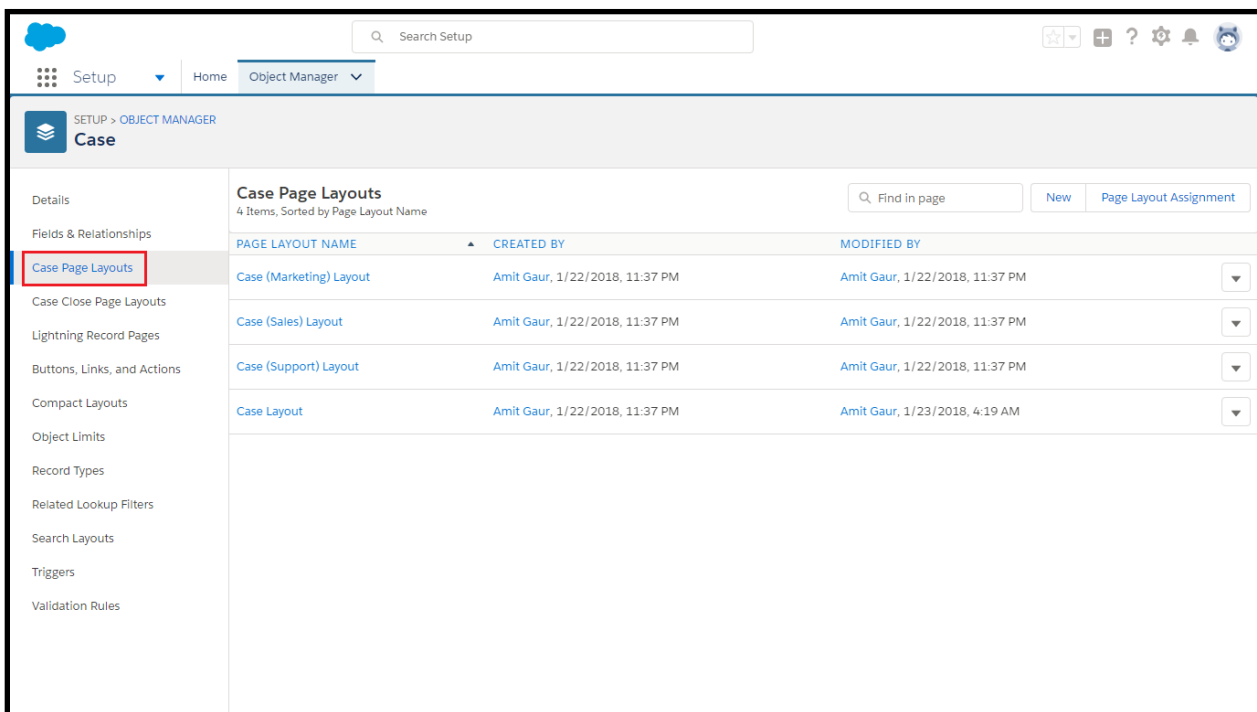
SETTING UP CASE OWNERSHIP

- To start using “Case Ownership” lightning component, first step is to click on the Object Manager.

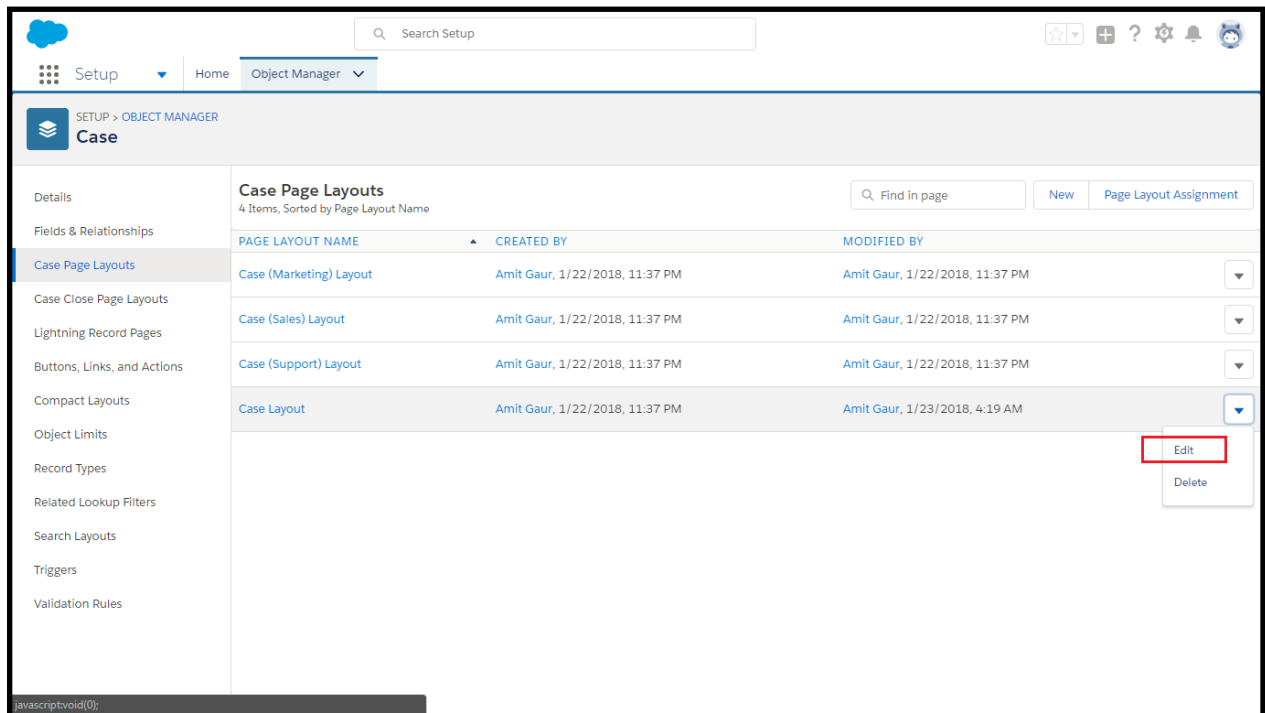




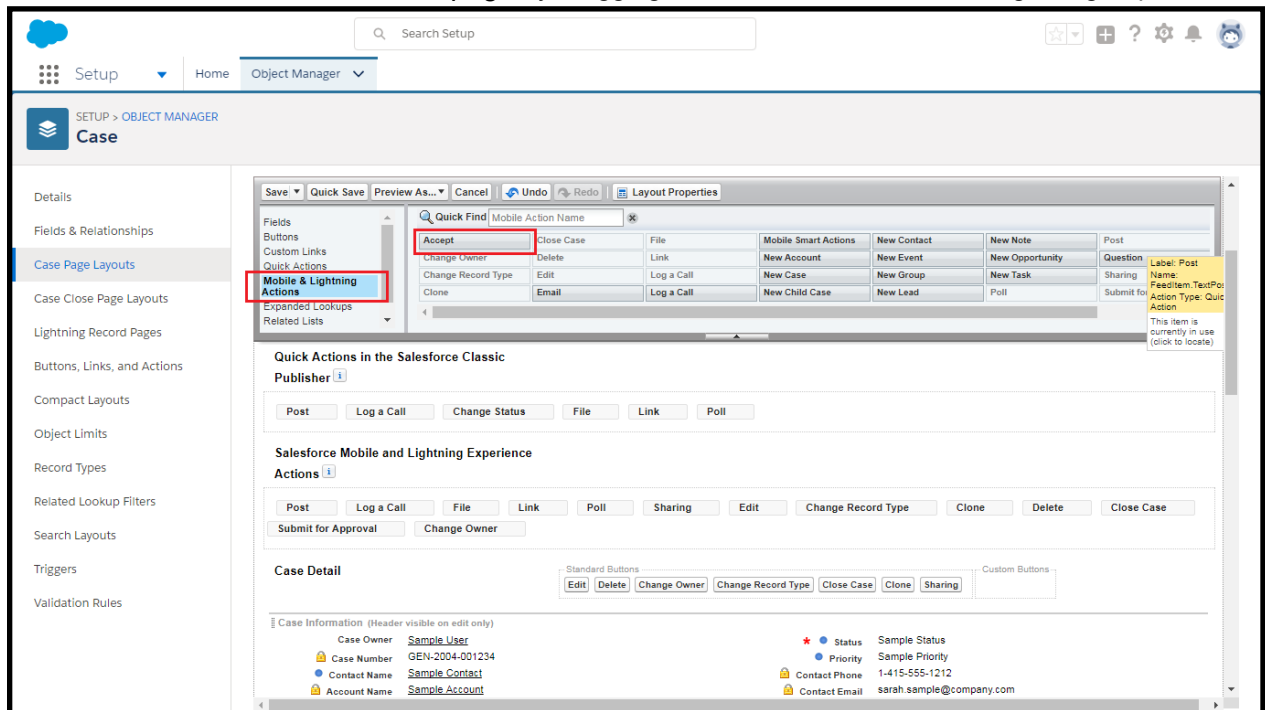
- On the Object Manager page click on the Case Object.



- For detail View, Click on the case Page Layouts.
- Click on dropdown Sign and select the "Edit".



- After selecting Case Layout the following screen appear, Now the user needs to add Action button on the detail page by dragging into Salesforce Mobile and Lightning Experience.



Setup > OBJECT MANAGER
Case

Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Accept	Close Case	File	Mobile Smart Actions	New Contact	New Note	Post
Change Owner	Delete	Link	New Account	New Event	New Opportunity	Question
Change Record Type	Edit	Log a Call	New Case	New Group	New Task	Sharing
Clone	Email	Log a Call	New Child Case	New Lead	Poll	Submit for Approval

Quick Actions in the Salesforce Classic
Publisher

Post Log a Call Change Status File Link Poll

Salesforce Mobile and Lightning Experience
Actions

Post Log a Call File Link Poll Accept Sharing Edit Change Record Type Clone Delete

Case Detail
Standard Buttons
Edit Delete Change Owner Change Record Type Close Case Clone Sharing Custom Buttons

Case Information (Header visible on edit only)

Case Owner Sample User
Case Number GEN-2004-001234
Contact Name Sample Contact

Status Sample Status
Priority Sample Priority
Contact Phone 1-415-555-1212

- Now, Click on the “Save” button

Setup > OBJECT MANAGER
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Case Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Section	Business Hours	Case Reason	Contact Mobile	Date/Time Closed	Escalated	Potential Liability
Blank Space	Case Number	Closed When Created	Contact Name	Date/Time Opened	Internal Comments	Priority
Account Name	Case Origin	Contact Email	Contact Phone	Description	Last Modified By	Product
Asset	Case Owner	Contact Fax	Created By	Engineering Req N...	Parent Case	SLA Violation

Case Sample

Highlights Panel

Customer
Sample Contact
Sample Account
1-415-555-1212

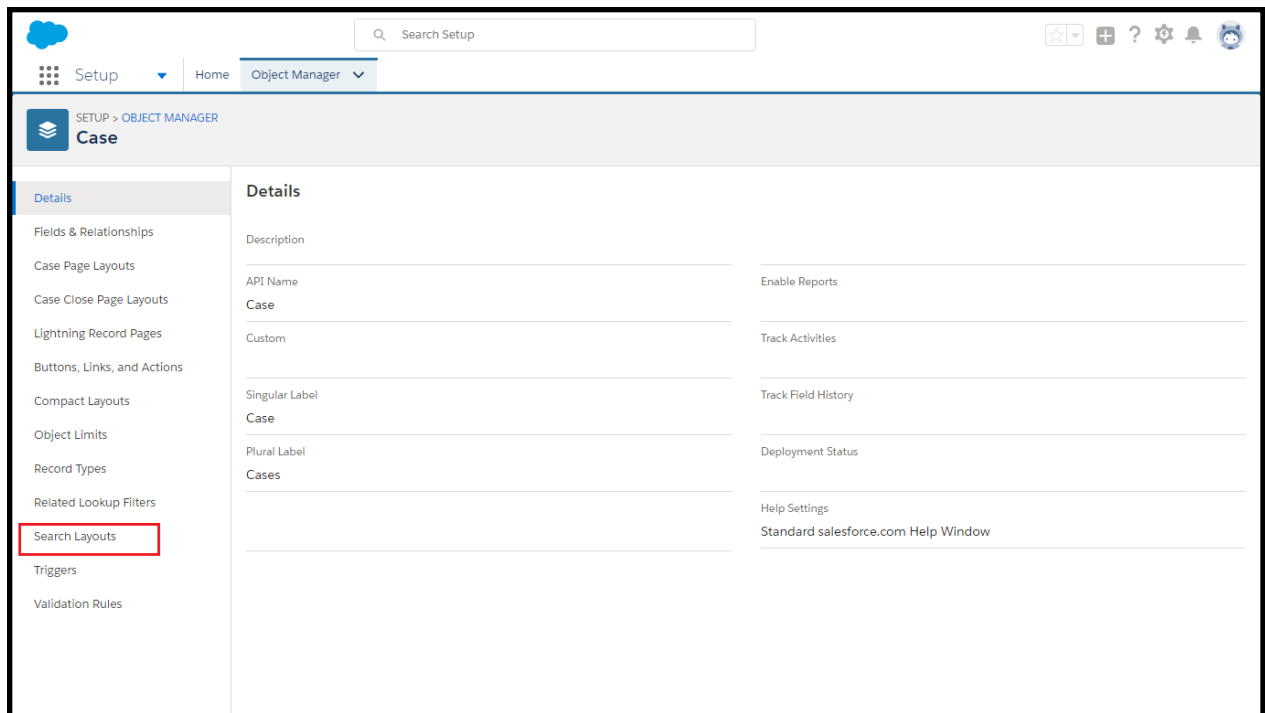
Case Number GEN-2004-001234
Created Date 1/24/2018 11:43 PM
Status Sample Status
Priority Sample Priority
Case Owner Sample User

Quick Actions in the Salesforce Classic
Publisher

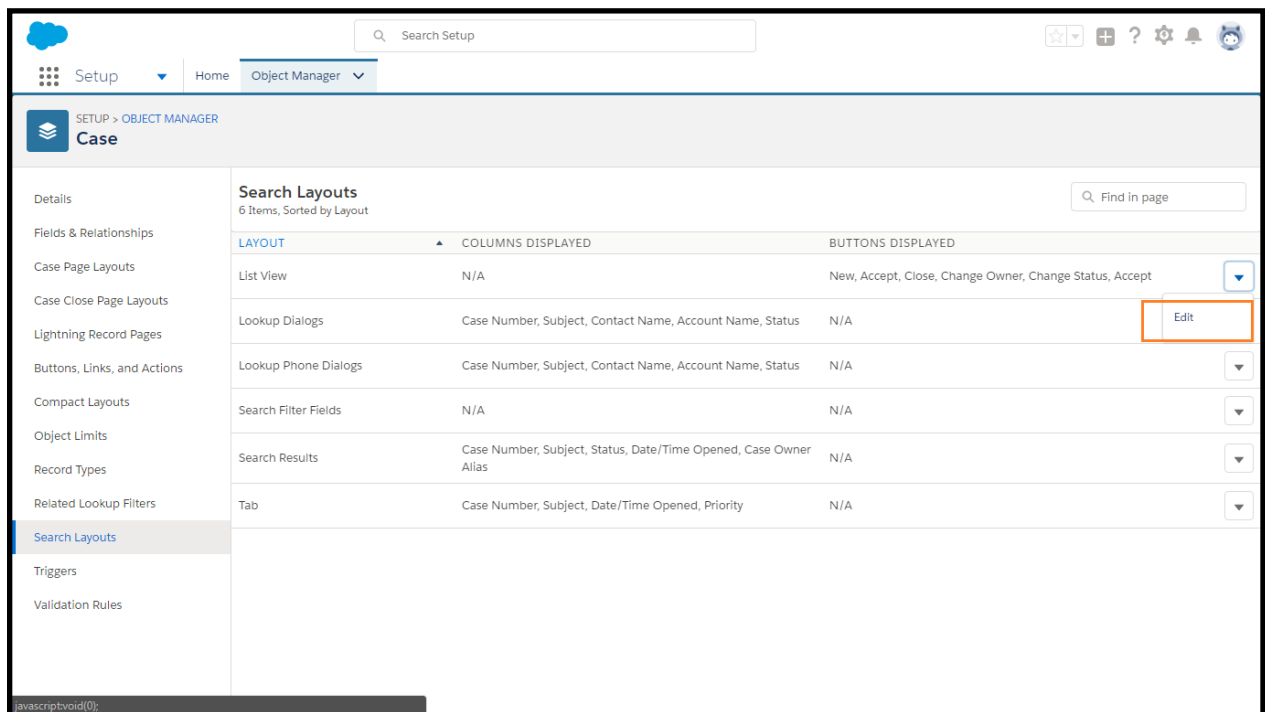
Post Log a Call Change Status File Link Poll

Salesforce Mobile and Lightning Experience
Actions

- For List View, Click on the Search Layouts



- Click on the drop down sign in front of List View and then select “Edit”.



- Now, Move the **Accept** button from the Available Buttons to Selected Buttons and click on the “save” button.

Setup Search Setup

Setup > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Validation Rules

Edit Search Layout

Cases List View

Customize the buttons on the Cases list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

- ☒ New [NewCase]
- ☒ Accept [Accept]
- ☒ Close [MassClose]
- ☒ Change Owner [ChangeOwner]
- ☒ Change Status [ChangeStatus]

Custom Buttons

Available Buttons: Accept

Selected Buttons: --None--

Add Remove Up Down

Save Cancel

Setup Search Setup

Setup > OBJECT MANAGER

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- ☒ New [NewCase]
- ☒ Accept [Accept]
- ☒ Close [MassClose]
- ☒ Change Owner [ChangeOwner]
- ☒ Change Status [ChangeStatus]

Custom Buttons

Available Buttons: --None--

Selected Buttons: Accept

Add Remove Up Down

Save Cancel

USING CASE OWNERSHIP

Example to show how the ownership of cases are changed from the list view, when the user select some cases and then click on the “Accept” button the case owner of those cases are changes to login Login user.

Search Setup

Setup Home Object Manager

Cases My Cases

3 Items selected

New Accept

	CASE NU...	CONTACT NAME	SUBJECT	STATUS	PRIORITY	DATE/TIME OPENED	CASE O...
1	☒ 00001000	Rose Gonzalez	Starting generator after electrical failure	Closed	High	1/22/2018 11:37 PM	AGaur
2	☒ 00001001	Avi Green	Performance inadequate for second consecutive week	Closed	High	1/22/2018 11:37 PM	AGaur
3	☒ 00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC5060	New	Low	1/22/2018 11:37 PM	AGaur
4	☐ 00001003	Babara Levy	Easy installation process	Closed	Low	1/22/2018 11:37 PM	AGaur
5	☐ 00001004	Babara Levy	Maintenance guidelines for generator unclear	Closed	Medium	1/22/2018 11:37 PM	AGaur
6	☐ 00001005	Josh Davis	Electrical circuit malfunctioning	Closed	Medium	1/22/2018 11:37 PM	AGaur
7	☐ 00001006	Edna Frank	Generator assembly instructions unclear	Closed	Low	1/22/2018 11:37 PM	AGaur
8	☐ 00001007	Tim Barr	Structural breakdown of rotor assembly	Closed	Medium	1/22/2018 11:37 PM	AGaur
9	☐ 00001008	Tim Barr	Customer service for portable generators needs beefing up	Closed	Low	1/22/2018 11:37 PM	AGaur
10	☐ 00001009	Ashley James	Mechanical maintenance guidelines for generator misleading	Closed	Medium	1/22/2018 11:37 PM	AGaur
11	☐ 00001010	Tom Ripley	Maintenance guidelines for generator unclear	Closed	Low	1/22/2018 11:37 PM	AGaur
12	☐ 00001011	Liz D'Cruz	Electronic panel fitting loose	Closed	Medium	1/22/2018 11:37 PM	AGaur
13	☐ 00001012	Jane Grey	Repeated motor breakdown while shutting off	Closed	Medium	1/22/2018 11:37 PM	AGaur
14	☐ 00001013	John Bond	Starting up generator consumes excessive power	Closed	Medium	1/22/2018 11:37 PM	AGaur
15	☐ 00001014	John Bond	Delay in installation; spare parts unavailable	Closed	High	1/22/2018 11:37 PM	AGaur
16	☐ 00001015	Liz D'Cruz	Frequent mechanical breakdown	Closed	Medium	1/22/2018 11:37 PM	AGaur

To change the owner from detail page of the case, click on “Accept” on the detail page.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Cases More

Case Design issue with mechanical rotor

+ Follow Edit Clone Delete

CHATTER RELATED

Post Log a Call Poll Accept

Share an update... Share

Latest Posts

Amit Gaur updated this record. 12m ago

Case Owner: TestQueue Status: New

Case Number: 00001024 Priority: Low

Contact Name: Lauren Boyle Contact Phone: (212) 842-5500

Account Name: United Oil & Gas Corp. Contact Email: lboyle@uog.com

Type: Mechanical Case Origin: Web

Case Reason: Equipment Design

Web Email: Web Company