



# Case Response Tracker

## Administrator Guide

Package Version 1.0

Last Updated 16<sup>th</sup> July 2020

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## Introduction

This package allows you to keep track and monitor the receipt of inbound emails, so you can ensure you provide a timely service to your customers. Once you reply to an inbound email, or simply clear the flag if its just a thank you note, the indicator is reset.

## Installation and Setup

1. Click the 'Get It Now' button on the AppExchange listing
2. Log into the Salesforce account you wish to install the package in.
3. Choose who you would like to install the package for. If you choose to install the package for admins only, you will be able to grant other users access to the reports and dashboard later.
4. Wait to receive an email confirming that the package has been successfully installed.
5. Verify the package has installed as expected by navigating to Setup > Installed Packages.

| Installed Packages |                         |           |                |                  |                   |        |      |      |         |                   |
|--------------------|-------------------------|-----------|----------------|------------------|-------------------|--------|------|------|---------|-------------------|
| Action             | Package Name            | Publisher | Version Number | Namespace Prefix | Install Date      | Limits | Apps | Tabs | Objects | AppExchange Ready |
| Uninstall          | Case Response Indicator | Alscient  | 1.0            | als_tracker      | 30/06/2020, 11:30 | ✓      | 0    | 0    | 0       | Not Passed        |

6. Navigate to Setup > Custom Metadata Types and select *Manage Records* on the *Response Indicator Threshold* type.

| New Custom Metadata Type |                              |                         |                  |            |                                                |             |             |
|--------------------------|------------------------------|-------------------------|------------------|------------|------------------------------------------------|-------------|-------------|
| Action                   | Label                        | Installed Package       | Namespace Prefix | Visibility | Api Name                                       | Record Size | Description |
| Manage Records           | Response Indicator Threshold | Case Response Indicator | als_tracker      | Public     | als_tracker__Response_Indicator_Threshold__mdt | 173         |             |

7. Select Edit on the record named *Active*:
  - a. Select the time after which Amber indicator should be shown. Default is 0.04 days (approximately 1 hour)
  - b. Select the time after which Amber indicator should be shown. Default is 0.16 days (approximately 4 hours)

Response Indicator Threshold Edit

Save Save & New Cancel

Information

Label

Active

Response Indicator Threshold Name

Active

Amber Threshold

0.04000000

Red Threshold

0.16000000

Namespace Prefix

als\_tracker

Save

Save & New

Cancel

8. Add the *Response Indicator* and *Indicator Date/Time* fields to the desired Case Page layouts. Do so by navigating to Object Manager > Case > Case Page Layouts.

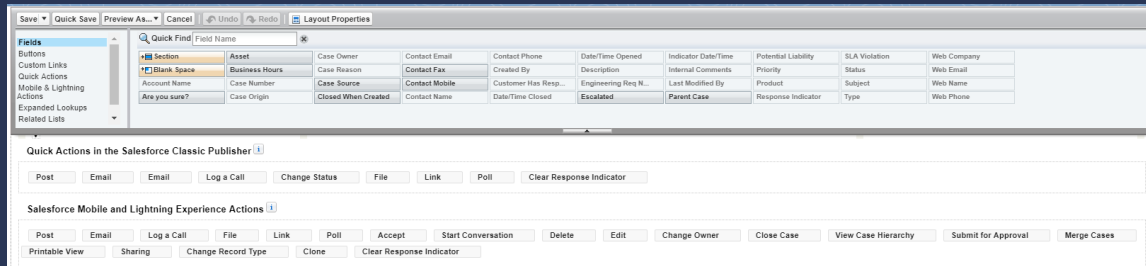
|                     |                                     |                |
|---------------------|-------------------------------------|----------------|
| Response Indicator  | als_tracker__Response_Indicator__c  | Formula (Text) |
| Indicator Date/Time | als_tracker__Indicator_Date_Time__c | Date/Time      |

Note: the other package fields are system fields and need not be displayed.

9. Add the *Clear Response Indicator* action to the desired page layouts.

|                          |                          |                             |                 |                      |
|--------------------------|--------------------------|-----------------------------|-----------------|----------------------|
| Clear Response Indicator | Clear_Response_Indicator | Clear the flag on this case | Update a Record | Action Layout Editor |
|--------------------------|--------------------------|-----------------------------|-----------------|----------------------|

10. Add these to the *Quick Actions in the Salesforce Classic Publisher* or *Salesforce Mobile and Lightning Experience Actions* for Classic or Lightning respectively.



**Fields**

Buttons  
Custom Links  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups  
Related Lists

**Quick Find** Field Name

|               |                |                     |                |                      |                      |                     |                     |               |             |
|---------------|----------------|---------------------|----------------|----------------------|----------------------|---------------------|---------------------|---------------|-------------|
| Section       | Asset          | Case Owner          | Contact Email  | Contact Phone        | Date/Time Opened     | Indicator Date/Time | Potential Liability | SLA Violation | Web Company |
| Blank Space   | Business Hours | Case Reason         | Contact Fax    | Created By           | Description          | Internal Comments   | Priority            | Status        | Web Email   |
| Account Name  | Case Number    | Case Source         | Contact Mobile | Customer Has Resp... | Engineering Req N... | Last Modified By    | Product             | Subject       | Web Name    |
| Are you sure? | Case Origin    | Closed When Created | Contact Name   | Date/Time Closed     | Escalated            | Parent Case         | Response Indicator  | Type          | Web Phone   |

**Quick Actions in the Salesforce Classic Publisher**

Post Email Email Log a Call Change Status File Link Poll Clear Response Indicator

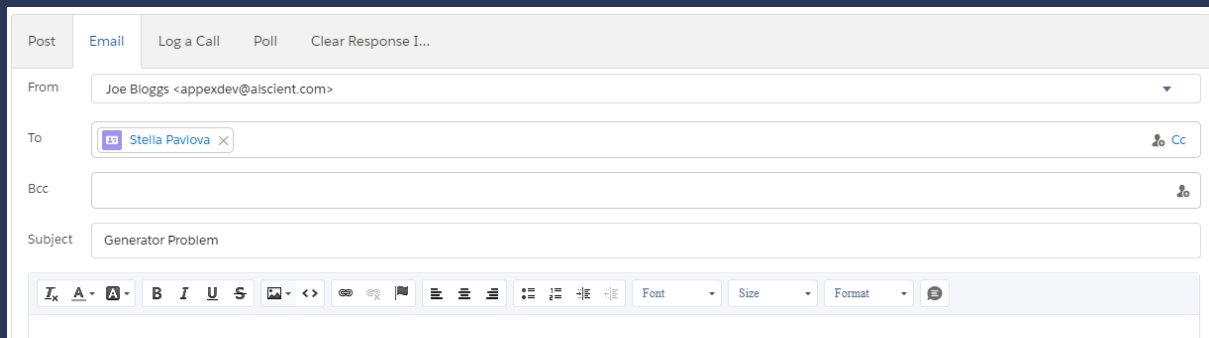
**Salesforce Mobile and Lightning Experience Actions**

Post Email Log a Call File Link Poll Accept Start Conversation Delete Edit Change Owner Close Case View Case Hierarchy Submit for Approval Merge Cases

Printable View Sharing Change Record Type Clone Clear Response Indicator

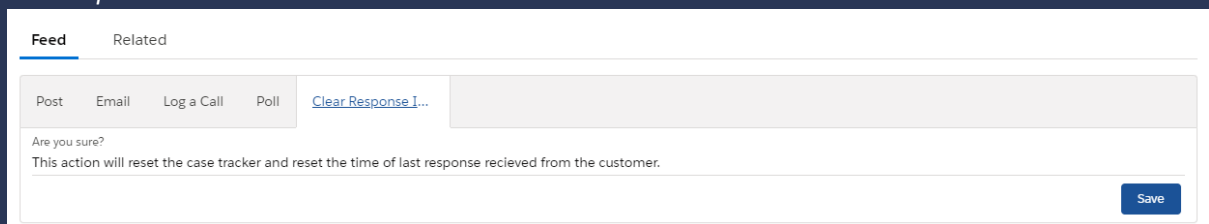
## User Instructions

1. When an email is received the *Indicator Date/Time* is set to the current time and the *Customer Has Responded* field is set to true. Note: these fields should not be manually changed to prevent issues when clearing the indicator.
2. The indicator can be cleared by sending an email from the corresponding Case.



The screenshot shows the 'Email' tab selected in a case management interface. The 'From' field is populated with 'Joe Bloggs <appexdev@alscient.com>'. The 'To' field contains a contact named 'Stella Pavlova'. The 'Subject' field is 'Generator Problem'. Below the fields is a rich text editor toolbar with options for bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, font color, background color, font size, and text format (plain, bold, italic, underline).

3. The Case indicator can be manually cleared, should a response not be required, using the *Clear Response Indicator* Action.



The screenshot shows a confirmation dialog for the 'Clear Response Indicator' action. The dialog has tabs for 'Feed' and 'Related', with 'Feed' currently selected. The 'Clear Response Indicator...' tab is active, displaying a confirmation message: 'Are you sure? This action will reset the case tracker and reset the time of last response recieved from the customer.' A 'Save' button is located at the bottom right of the dialog.