Case Response Tracker

Administrator Guide

Package Version 1.0

Last Updated 16th July 2020

Contents

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 — = Required 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.

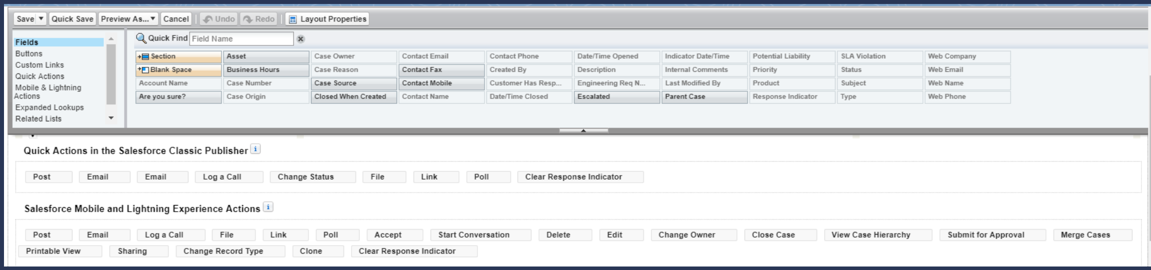
Response Indicator	als_tracker__Response_Indicator__c	Formula (Text)
Indicator Date/Time	als_tracker__Indicator_Date_Time__c	Date/Time

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

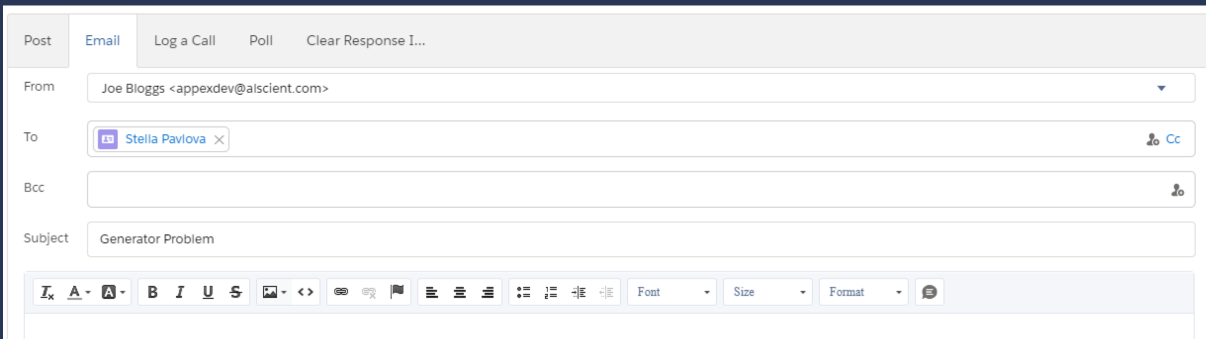
10. Add these to the *Quick Actions in the Salesforce Classic Publisher* or *Salesforce Mobile and Lightning Experience Actions* for Classic or Lightning respectively.



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.



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