

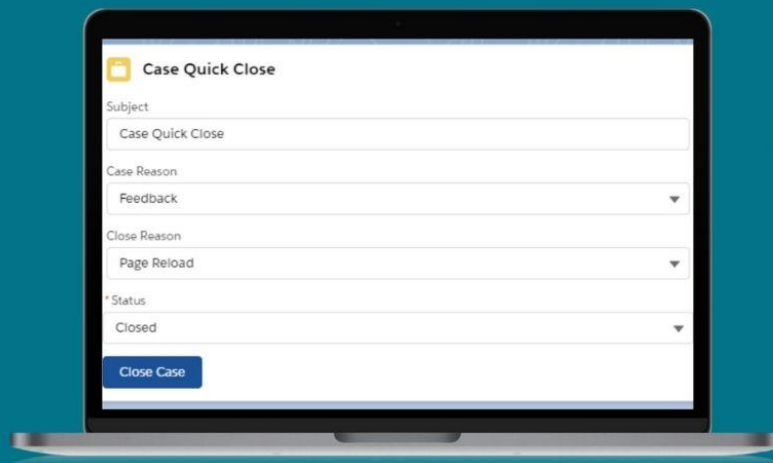
Installation Manual

Case Quick Close

22 July 2021

Version 1.4

Case Quick Close



Crafted with care by a Berlin CTA

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30-minute Setup Guarantee

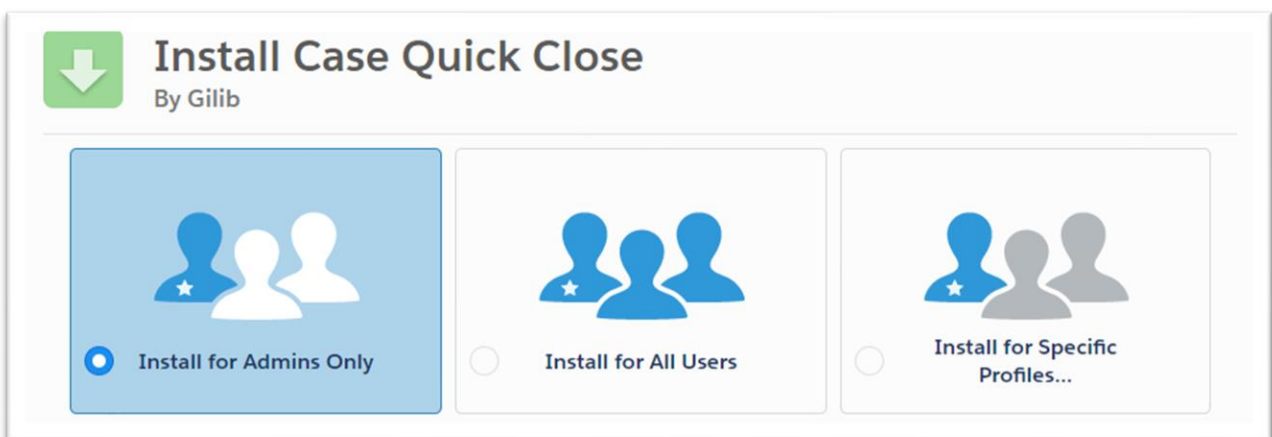
We want to make the installation as easy as possible. If you have any issues installing or setting up the Package “Case Quick Close” don’t hesitate to write an email and we will come back as fast as possible. We only stop when you are up and running!

Email: johann@cloudjohann.com

Installation

Get the AppExchange Package on AppExchange and Click “Get It Now”.

Select “Install for Admins only” and click “Install”.



Initial Setup

The fields displayed on the Page Layout are defined by a Field Set. The Field-Set is defined for the Case Object itself. The Field Set needs to be created and must be called “Case_Quick_Close_Button_Field_Set”.

Furthermore, the Button “Case Quick Close” Button or Component needs to be added to the Case Page Layout or Lightning Record Page respectively.

Field Set

The Field Set controls the fields displayed in the Close Case Component.

You can either use a default field set or Record Type specific field sets. The Button first checks for a Record Type specific field set, if no Record Type specific one is found get's the default one.

1. Click “Setup”
2. Select “Object Manager”
3. Search for “Case” and click on “Case”
4. Click on “Field Set”
5. Create a Field Set. **Make sure the Field Set Label and Name are correct.** Easiest is to copy paste without the quotation marks.

Default Field Set:

- a. Field Set Label :
“Case_Quick_Close_Button_Field_Set”
- b. Field Set Name:
“Case_Quick_Close_Button_Field_Set”
- c. Description:
“Case_Quick_Close_Button_Field_Set”

Record Type specific field set:

- a. Field Set Label : “CQCB_RT_[Record Type API Name]” **Example: CQCB_RT_FAQ**
- b. Field Set Name: “CQCB_RT_[Record Type API Name]” **Example: “CQCB_RT_FAQ”**
- c. Description: “CQCB_RT_FAQ”

NOTE: If the Record Type API Name has more than 32 characters, only the first 32 characters of the Record Type Name need to be added to the Field Set Name.

6. Click “Save”
7. Add Fields you want to display in the Case Quick Close component.
8. Click “Save”

Button

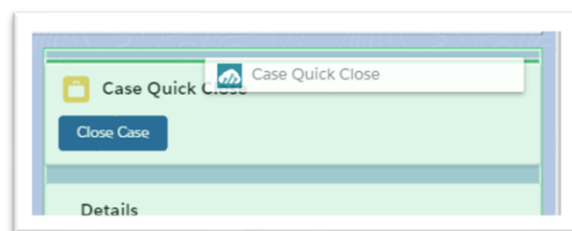
In order to add a standard Salesforce Button to Case Feed follow the following explanation. If you rather use a dedicated Lightning Component containing a Button go to the next section.

1. Click "Setup"
2. Select "Object Manager"
3. Search for "Case" and click on "Case"
4. Go to "Page Layouts" and select the Page Layout you want to add the Button to.
5. If not done yet: Enable "Override customization" by clicking the wrench icon in the "Salesforce Mobile and Lightning Experience Actions".
6. Select "Mobile & Lightning Actions" Search for the Action "Case Quick Close"
7. Drag&Drop the Button on "Salesforce Mobile and Lightning Experience Actions"
8. Click Save
9. Repeat last step for all Page Layouts you'd like to add the Button to.

Lightning Component

As an alternative to using a standard Button you can also add a Lightning Component which contains the button 'Close Case. Works on Lightning Record Pages.

1. Select a Case
2. Click "Edit Page" on
3. Search for "Case Quick Close" in the Components section
4. Drag and Drop the component to where you want to display the button.

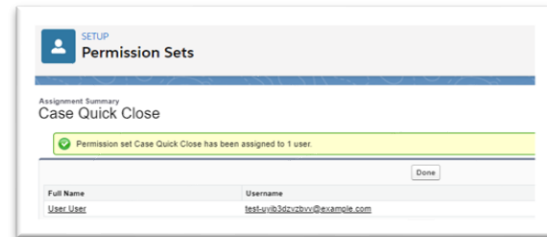


Permission Set

This Permission Set "Case Quick Close" controls the access to the App. System Administrators can use the App without Permission set.

1. Click Setup -> Home
2. Search for "Permission Sets" and open Permission Sets

3. Select the Permission Set "*Case Quick Close*".
4. Click "Manage Assignments"
5. Click "Add Assignments"
6. Select all the Users you want the App to be using and Click "Assign"
7. Check if all Users are assigned to Permission Set.



FAQ:

Does it work in Experience (Community)?

Experience support is currently not implemented. Please let me know if you need support for Experience (Community)

Credits

Thanks goes to so many people who supported me. Three of them stood out:

Jurgen Cuni, JodieM and Bram Julsing .