SALESFORCE PLATFORM DELIVERY TEAM:

KNOWLEDGE ARTICLE:

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Informational Document -SOP

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Title	Concierge Case Status Management
URL Name	

Summary
The purpose of this document is to explain how the *Status* field is assigned to a case throughout the Salesforce Platform Delivery Team workflow in Concierge.

Details

When a **Service Request** has been created in Concierge; a "new" status will be designated to the case. As each case moves through Concierge to either a *person* or *queue*, the status should reflect what stage the case is in. This is important to select the correct status for reporting and workload distribution. Below explains how a *status* can be assigned.

CASE STATUSES
A case within the Salesforce Platform Delivery Team workflow may be assigned as one of three status types:

    A. **New**: A case that has recently been created but has not yet been started.
    B. **In Progress**: A case currently being worked on with no barrier to completion.
    C. **Pending:** A case that is waiting for an action or response from someone outside the Salesforce Platform Delivery Team.

CASE STATUS - "NEW"

    A. **New (Service Request):** When a Service Request is created through the Innovative Idea Service Catalog it will be designated as a "new" case assigned to the *BA queue*. The case will remain in a new status until the BA has started requirements gathering.

CASE STATUS - "IN PROGRESS"

    A. **Salesforce Business Analyst:** These are *Service Request* cases that are being evaluated and researched by the BA. Once the BA has completed the user story for the request, the case will

advance to the Salesforce Queue. The BA has the following status available: New, In Progres, Pending Requester, Pending Approval.

B. **Salesforce Queue (Backlog):** These cases have not yet been assigned. These cases will be assigned during the sprint meeting or as additional work can be accepted. This queue should only have "In Progress" status.

C. **Salesforce Admin:** These cases have been assigned to a Salesforce Admin and are actively being worked on with no barrier to completion. The Salesforce Admin has the following status available: In Progres, Pending Requester, Pending Third Party, Scheduled, "Pending Change".

CASE STATUS - "PENDING"

A. **Pending Requester:** More information is needed from the requester. The case owner and/or Business Analyst has reached out for additional information and is awaiting feedback.
(SLA clock stops)
A. **Pending Approval:** This status is used when a case needs to be reviewed by the BA or Salesforce Admin to determine viability. (SLA clock is active)
B. **Scheduled**: This is used when the work has been completed and is waiting for CAB.
C. **Pending Change:** Development and testing is complete. The case is pending the change control process and deployment.
(Currently not in Service Request).
D. **Pending Third Party:** The case is waiting for input or action required by a third party (such as Cadalys or FPI).