



# GETTING TO KNOW CASE FEED

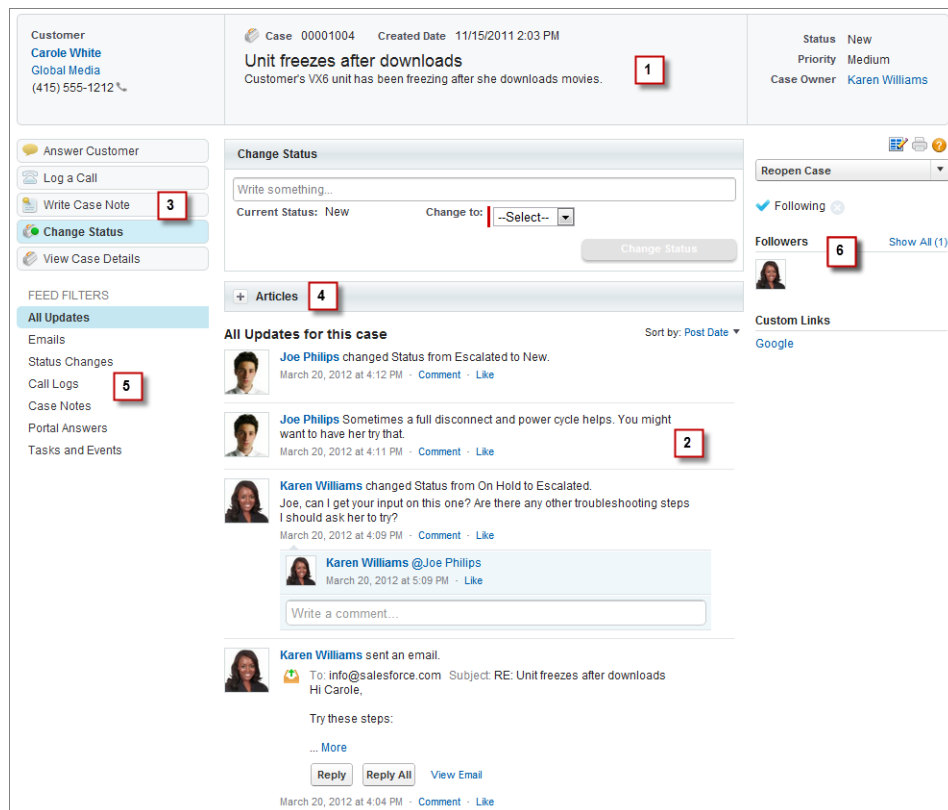
Case Feed introduces a new way of creating, reviewing, and updating cases. It's designed for support agents in fast-paced environments who interact with customers through multiple channels, including phone, email, and portals.

This tip sheet offers an overview of Case Feed features and explains how it makes working with cases easier.

 **Note:** Depending on how your administrator has set up Case Feed in your organization, you may not see some of the features described below.

## Case Feed Overview

The main Case Feed page gives a high-level overview of the case. You can quickly see the case status and Chatter updates, and take action on the case,



The screenshot displays the Salesforce Case Feed interface for a case titled "Unit freezes after downloads". The interface is divided into several sections:

- Case Header (1):** Displays case information including the customer (Carole White), case number (00001004), created date (11/15/2011 2:03 PM), status (New), priority (Medium), and case owner (Karen Williams).
- Left Sidebar:** Contains action buttons like "Answer Customer", "Log a Call", "Write Case Note" (3), "Change Status", and "View Case Details". It also includes a "FEED FILTERS" section with options like "All Updates", "Emails", "Status Changes", "Call Logs" (5), "Case Notes", "Portal Answers", and "Tasks and Events".
- Change Status (1):** A section for updating the case status, showing the current status (New) and a dropdown menu to select a new status.
- Articles (4):** A section for viewing case-related articles.
- All Updates for this case:** A feed of updates, including status changes (e.g., "Joe Philips changed Status from Escalated to New") and comments (e.g., "Joe Philips Sometimes a full disconnect and power cycle helps..."). A comment by Karen Williams is also visible (2).
- Right Sidebar:** Includes a "Reopen Case" button, a "Following" status, a "Followers" list (6), and "Custom Links" (e.g., Google).

Case Feed includes these features:

- 1. Highlights panel.** Shows the most important information about a case at the top of the page.
- 2. Chatter feed.** Lists updates made to the case.
- 3. Publisher tools.** Let you communicate with customers, log calls, write case notes, and view details about the case, all from within the feed.

4. **Articles tool.** Makes it easy to search for Salesforce Knowledge articles and attach them to the case or email them to the customer.
5. **Feed Filters.** Filters case activities by type for a one-click view, such as a view of all emails associated with the case.
6. **Followers.** Lists case followers so you can easily see the other agents who are involved in resolving the customer's issue.

The following sections highlight the tasks you can do from the main Case Feed page.

## Viewing Case Information

In the standard case layout, getting an overview of a case and its details requires looking at related lists and clicking around to find the information you want. With Case Feed, it's easy to see both the highlights of and details about a case.

### Feed

The screenshot displays the 'All updates for this case' feed. At the top right, a 'Sort by: Post Date' dropdown menu is open, showing options for 'Post Date' (selected) and 'Post & Comment Date'. The feed contains several updates from Karen Williams and Joe Philips, including email messages, status changes, task creation, and call logs. Each update includes a user profile picture, the user's name, the action taken, and the timestamp. Interaction links like 'Comment' and 'Like' are provided for each update. The first update from Karen Williams includes a 'Try these steps:' section with a 'More' link and buttons for 'Reply', 'Reply All', and 'View Email'.

The feed shows updates made to a case, who made them, and when they were made. You can comment on or like an update, which will automatically make you a follower of the case. Depending on your Chatter feeds settings, you might receive email notifications when new updates happen, or when someone else comments on the case. (To check these settings, from your [personal settings](#), enter *My Feeds* in the *Quick Find* box, then select **My Feeds**.) You can use the **Sort by** drop-down list to show case updates by the date they were made or by the date of the most recent comment.

### Feed Filters

## Getting to Know Case Feed

FEED FILTERS

All Updates

Emails

Status Changes

Call Logs

Case Notes

Portal Answers

Tasks and Events

Feed filters let you limit the updates displayed in the feed. For example, click **Call Logs** to show only information about calls related to the case.

### Highlights Panel

<b>Customer</b> <b>Carole White</b> Global Media info@salesforce.com (415) 555-1212	<b>Case</b> 00001004 <b>Created Date</b> 11/15/2011 2:03 PM <b>Unit freezes after downloads</b> Customer's VX6 unit has been freezing after she downloads movies.	<b>Status</b> Escalated <b>Priority</b> Medium <b>Case Owner</b> Karen Williams
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The highlights panel at the top of the page shows key information about the case, such as the customer's name and contact information, the date the case was created, and the case owner. Your administrator can customize this panel to include the information that's most relevant to your team. Contacts, accounts, case owners, and other related fields appear in the panel as links; click one to go to its detail page.

### Case Detail Page

<b>Customer</b> <b>Carole White</b> Global Media (415) 555-1212	<b>Case</b> 00001004 <b>Created Date</b> 11/15/2011 2:03 PM <b>Unit freezes after downloads</b> Customer's VX6 unit has been freezing after she downloads movies.	<b>Status</b> New <b>Priority</b> Medium <b>Case Owner</b> Karen Williams
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Answer Customer

Log a Call

Write Case Note

Change Status

View Case Details

Activity History (5)

Attachments (2)

Contact Roles (1)

Emails (2)

Open Activities (1)

**Case Detail**

Edit Delete Close Case Clone Reopen Case Reassign

Case Owner

Karen Williams [Change]

Contact Name

Carole White

Account Name

Global Media

Status

New

Priority

Medium

Contact Phone

(415) 555-1212

Contact Email

info@salesforce.com

Case Origin

Phone

Subject

Unit freezes after downloads

Description

Customer's VX6 unit has been freezing after she downloads movies.

Custom Links

Google

Edit Delete Close Case Clone Reopen Case Reassign

**Activity History**

Log A Call Mail Merge Send An Email View All Activity History Help

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit   Del	Email: RE: Unit freezes after downloads [ref. 00DD0JWA...500D03av7u.ref]		✓	3/20/2012	Karen Williams	3/20/2012 4:04 PM
Edit   Del	Call Log	Carole White	✓	3/5/2012	Karen Williams	3/5/2012 12:11 PM
Edit   Del	QC Team Meeting	Carole White		2/29/2012 2:00 PM	Karen Williams	2/15/2012 1:34 PM
Edit   Del	Email: Unit freezes after downloads [ref. 00DD0JWA...500D03av7u.ref]		✓	11/16/2011	Karen Williams	11/16/2011 5:22 PM
Edit   Del	Call Log	Carole White	✓	11/15/2011	Karen Williams	11/15/2011 2:18 PM

**Attachments**

Attach File View All Attachments Help

Action	File Name	Size	Last Modified	Created By
Edit   View   Del	IE 9 files to fix_all.docx	21KB	2/15/2012 1:34 PM	Karen Williams
Edit   View   Del	176 RN 2-3-12.pdf	2.86MB	2/15/2012 1:33 PM	Karen Williams

## Getting to Know Case Feed

To see the standard detail page for a case, click **View Case Details**. From the detail page, you can access all of the information about the case, including tasks and events. Use the links below the **View Case Details** button for easy access to any of the related lists on the page.

## Working on a Case

No matter how you communicate with customers to resolve their issues, you can work directly from the feed.

### Email

The screenshot shows the Case Feed interface. On the left, there is a sidebar with buttons: 'Answer Customer', 'Log a Call', 'Write Case Note', 'Change Status', and 'View Case Details'. Below these is a 'FEED FILTERS' section. The main area has a '+ Email' button with a dropdown arrow and a 'Select a Template' link. Below the button is a text input field with the placeholder 'Write an email to the customer...'. There is an 'Attach File' link and a 'Send Email' button. At the bottom, there is an 'Articles' section with a '+ Articles' button.

Click **Answer Customer** and choose **Email** to reply to the customer by email. You can use the Rich Text Editor and templates to format your message. For details, see “Customize Emails with the Rich Text Editor in Case Feed” and “Use Email Templates in Case Feed” in the Salesforce online help.

The screenshot shows the 'Articles' section in the Case Feed interface. It has a search bar with the text 'Unit freezes after downloads' and a 'Search Again' button. There is a link to 'Advanced Article Search'. Below the search bar, there is a dropdown menu with the text 'Why is my VX6 freezing?'. A tooltip is visible over the dropdown menu, showing 'Email to customer' and 'Attach to case'. The 'Attach to case' option is selected. The 'case' label is visible at the bottom right. The 'Sort by: Post Date' dropdown is also visible.

If your organization has Salesforce Knowledge enabled, you can use the articles tool to search for articles relevant to the case and email them to the customer. Check out “Find, Attach, and Email Articles with the Case Feed Articles Tool” in the Salesforce online help for more information .

The screenshot shows the 'Email' button in the Case Feed interface. It has a dropdown arrow and a 'Select a Template' link. Below the button is a Rich Text Editor with a toolbar containing 'Font', 'Size', 'B', 'I', 'U', and other formatting options. The editor contains the following text: 'Because your issue was due to a faulty remote control, we will send you a replacement. Ple... We appreciate your patience as we work to resolve your issue Try these troubleshooting steps to fix the problem with your VX6 unit: 1.) Turn the unit off. 2.) ... I have escalated your case to technical support for review. Dear {!Contact\_FirstName}, Thanks for emailing customer support. Remote replacement Because your issue was due to a faulty remote control, we will send you a replacement. Please confirm that this is the correct mailing address to use: {!Contact\_FullMailingAddress}'. There is an 'Attach File' link and a 'Send Email' button.

If your organization has Quick Text enabled, you can insert short pre-written messages into your emails. Type **;;** to bring up the list of available messages. Click one to see the full text of the message, and click it again to add it to your email.

For more information, see “Use Quick Text in Case Feed” in the Salesforce Help.

### Portal Answers

## Getting to Know Case Feed

The screenshot shows the 'Answer Customer' interface. On the left is a sidebar with buttons: 'Answer Customer' (highlighted), 'Log a Call', 'Write Case Note', 'Change Status', and 'View Case Details'. The main area is titled 'Portal' and contains a text input field 'Write an answer...', a checked checkbox for 'Send Email Notification', and an 'Answer via Portal' button. At the bottom is an 'Articles' section with a plus icon.

If your organization uses a Partner Portal, Customer Portal, or Self-Service Portal, you can respond to customers directly through it. Just click **Answer Customer** and choose **Portal**. You can also reply to a message that has come in through a portal by clicking **Answer via Portal** below the message in the feed.

When you contact a customer through the portal, you can select **Send Email Notification** to send the customer a message letting them know that you've posted a reply to their question.

### Logging Calls

The screenshot shows the 'Log a Call' interface. The sidebar is identical to the previous one. The main area is titled 'Log a Call' and contains a text input field 'Write your call notes...', a 'Customer Name' field with 'Carole White' entered, and a 'Log a Call' button.

When you communicate with customers by phone, click **Log a Call** to write and save notes about the call. If you're using a SoftPhone for Salesforce CRM Call Center, completed calls and call notes are automatically added to the feed.

### Case Status

The screenshot shows the 'Change Status' interface. The sidebar is identical. The main area is titled 'Change Status' and contains a text input field 'Write something...', a 'Current Status' field showing 'New', and a 'Change to:' dropdown menu. The dropdown menu is open, showing options: '--Select--', '--Select--', 'On Hold', 'Escalated', and 'Closed'. A 'Change Status' button is on the right.

To change the status of a case, click **Change Status** and choose the new status from the **Change to:** drop-down list. You can use the text box to add notes about the status change. When you change the status of a case to Closed, you might be prompted to enter additional information, such as the reason for closing the case or the final resolution, depending on how your administrator has set up the Change Status tool.

## Collaborating with Others on Cases

Case Feed makes it easy to work with your teammates to resolve customers' issues.

### Case Notes, Mentions, and Keywords


The screenshot shows the 'Write Case Note' interface. The sidebar is identical. The main area is titled 'Write Case Note' and contains a text input field for writing a note. Above the field are icons for 'Post', 'File', and 'Link'. A 'Share' button is at the bottom right.

Share updates about a case with others in your department or get input from them by clicking **Write Case Note**. To mention someone in your note, type @ and start typing a name, then choose the name you want from the list that appears. People you mention in your note receive an email notification.

## Getting to Know Case Feed

**Updates for everything at my company**


Sort by: Post Date ▾



00001004 — Karen Williams changed Status from New to Escalated.


Escalating this to Joe for more input. Have you heard of this happening to other customers? Is it just the VX6, or are other models also affected?

November 16, 2011 at 4:57 PM · [Comment](#) · [Like](#)



Karen Williams #VX6


Today at 1:10 PM · [Like](#)



00001004 — Karen Williams logged a call.


Called and spoke with Carole to get some additional details on the problem she's having. Will call her back tomorrow once she's had the chance to do some troubleshooting.

November 15, 2011 at 2:18 PM · [Comment](#) · [Like](#)




Karen Williams #VX6

Today at 1:09 PM · [Like](#)



00001004 — Karen Williams created this case.

November 15, 2011 at 2:03 PM · [Comment](#) · [Like](#)



Karen Williams #VX6

Today at 1:09 PM · [Like](#)

Add keywords or phrases to your notes by typing them after a hashtag (#)—for example, #VX6. Click a keyword in any feed to see a list of all the case updates throughout your department that use it.

**Tip:** You can also use hashtags and mentions (for example, @YourName) when you comment on a case update.

## Learning More

To find out more about Case Feed, click **Help for this Page** on the feed page or search for Case Feed in the Salesforce online help.

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