TIPS & HINTS FOR SUPPORT REPS

1. Identify and Qualify the Customer

When Customers contact you with support issues via phone, email, or Web, you must first identify and qualify the customer:

- From the Cases tab, search for the customer's account.

  Optionally, if your organization uses the Console tab, select Cases from the top left drop-down list in the console's list view, then select a list view of cases. For more information on the console, see the Salesforce online help.
- If necessary, verify that the customer is eligible for support.
- Locate the correct contact on the account and display it. Or, click **New** in the Contacts related list to create a new contact.
- For cases submitted via Web-to-Case, Salesforce automatically links the case to an existing contact based on the person's email address. If a contact does not yet exist, create a new one and associate it to the case.

Web-to-Case

- Depending on your setup, online cases are automatically assigned to a user or queue.
- Choose the My Open Cases list view to see your assigned cases.
- View your team's queue list view to take cases from the queue.

2. Capture the Case Detail

Capture and record the case details reported by the customer:

- From the contact, click **New Case** in the Cases related list.
- Enter the information, and click **Save**.

For online cases, the customer completes case details.

3. Research and Resolve the Case

Research the issue and resolve the case using your organization's solutions:

- In the Solutions related list of the case, enter keywords related to possible solutions. If your organization uses categories, select a category to search. Click **Find Solution**. Alternatively, if the suggested solutions feature is enabled, click **View Suggested Solutions** to find solutions relevant to the case.
- A list of possible solutions is displayed. Attach a relevant solution to the case by clicking **Select** next to a reviewed solution, or by selecting an unreviewed solution and clicking **Select** on the solution detail page.

Working Cases

- Use Case Comments to record additional information as you work on the case.
- Use the `Parent Case` field to associate the case to similar cases for easy tracking.

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Email Templates

Your administrator can create or customize templates to include case and solution info.

4. Communicate with the Customer

Email the customer with the solution to the issue:

- From the case, click **Send An Email** in the Activity History related list.
- Click **Select Template** to choose a customer support email template.
- Complete the email, and click **Send** to email the solution to the customer.

Creating Solutions

If you cannot find a solution, enter solution details when closing the case.

5. Close the Case

The final step is to close the customer's case:

- From the case record, click **Close Case**.
- Change the case status and reason, and enter any internal comments.
- Click **Save**.