IMPLEMENTING CASE FEED

Summary

Case Feed gives you a new way to create, manage, and view your organization's cases. Use this tip sheet to implement Case Feed, understand the impact of upgrading cases to the new interface, and get an overview of its features.

Set Up Cases for Salesforce Classic

Follow these high-level steps to set up Case Feed in Salesforce Classic.

Prerequisites and Basic Setup

Before you enable and customize Case Feed:

- Decide which actions and tools you need:
  - To use the Email action, set up Email-to-Case.
  - To use the articles tool, set up Salesforce Knowledge.
- Review how cases are upgraded and know what to expect when you enable Case Feed actions and feed items.

When you're ready, enable Case Feed actions and feed items.

Note: In organizations created before Winter '14, you also need to:

- Enable Chatter and actions in the publisher.
- Enable feed tracking on cases. On the feed tracking page, turn off tracking for the Status field. Turning off tracking for the Status field prevents duplicate feed items when agents update a case's status using the Change Status action.

Customizing Page Layouts

Choose what you want to appear on Case Feed page layouts based on your company's needs and how your support agents work.

- Create layouts for case detail and close case pages and highlights panels.
- Create layouts for feed view pages to specify which actions, fields, and tools agents see when they're working with cases.

Giving Users Access

The easiest way to give users access to Case Feed is to assign them to profiles that use the feed-based case page layouts you create.

In organizations created before Spring '14, you may also be able to give users access in two other ways:

- By creating permission sets and assigning them to users
- Through custom profiles

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Setting Up Case Feed: Adding More Functionality

Follow these optional steps to add more functionality to Case Feed.

- To let agents include short, pre-written messages in their emails, set up Quick Text and create Quick Text messages.
- To give agents the option of emailing customers to let them know when questions they've posted to a portal have been answered, enable portal email notifications.
- To allow agents to save email messages as drafts before sending them, and to make it possible to create approval actions for email, enable email drafts.
- To help agents save time and increase consistency when sending emails to customers, create text, HTML, or Visualforce email templates.
- To let agents automate repetitive tasks, add the macros browser to the console and give agents permission to use macros.
- To give agents access to more functionality, create and add custom actions.

Enable Case Feed Actions and Feed Items

Enabling Case Feed actions and feed items gives your users access to some standard actions they'll need when working with cases, such as Email and Change Status, and to feed items related to those actions.

Note: In Salesforce orgs created before the Winter '14 release, you must enable feed tracking on Cases before you can enable the Case Feed actions and feed items. If feed tracking isn't enabled, then the `Enable Case Feed Actions and Feed Items` isn't visible.

In Salesforce organizations created after the Winter '14 release, feed tracking on cases and Case Feed actions and feed items are automatically enabled.

1. From Setup, enter *`Support Settings`* in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Case Feed Actions and Feed Items`.
4. Click **Save**.

Once you enable Case Feed actions and feed items, your cases are upgraded to the new user interface automatically. We recommend that you wait until this upgrade process is finished before giving users access to Case Feed.

Create Permission Sets for Case Feed

After you enable Case Feed for your organization, create a permission set to give users access to it.

Note: The Use Case Feed permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a permission set for Case Feed.

   Walk Through It

2. On the Permission Set page, click **App Permissions**.

3. Select `Use Case Feed`. Optionally, select any other permissions you want to include in the set.
4. Click **Save**.

   Tip: If you have an existing permission set, you can edit it to include the `Use Case Feed` permission.

Assign Case Feed to Users

After you've enabled Case Feed in your organization and created a permission set that includes it, assign that permission set to users.

1. From Setup, enter *`Users`* in the `Quick Find` box, then select **Users**.
2. Select a user's name.
3. In the Permission Set Assignments list, click **Edit Assignments**.
4. Select the permission set you want in the `Available Permission Sets` list, and then click **Add**.
5. Click **Save**.

Give Users Access to Case Feed Through Custom Profiles

Instead of giving users access to Case Feed through permission sets, you can create a custom profile that includes the `Use Case Feed` user permission.

Note: The Use Case Feed permission is available only on orgs created before Winter '14 that haven't enabled feed-based layouts. Case Feed is automatically enabled and assigned to all standard profiles in Salesforce organizations created after the Winter '14 release.

1. Create a profile.
2. On the Profile page, click **Edit**.
3. In General User Permissions, select `Use Case Feed`.
4. Click **Save**.
5. Assign users to the profile.

Set Up Quick Text

Quick Text lets users create messages, such as greetings, answers to common questions, and short notes, which support agents can easily insert into case updates and communications with customers to save time and increase standardization. When you set up Quick Text, you enable it, set the user permissions so agents can use it, and create standardized messages.

1. Enable Quick Text.

   Quick Text is automatically enabled for organizations that have enabled Live Agent, but you might not see it enabled in your Quick Text settings. If you encounter this, manually enable Quick Text.
2. Optionally, customize Quick Text settings.
3. Grant permissions to users so that they can create Quick Text messages.
4. Create Quick Text messages.

5. If your organization uses Live Agent, give agents access to the Quick Text sidebar in the Live Agent console.

Enable Portal Reply Email Notifications in Case Feed

If your organization uses a portal or community, support agents can use the Community action in Case Feed to respond to customers. Enabling portal reply email notifications gives agents access to the `Send Email` option in the Community action.

1. From Setup, enter *`Support Settings`* in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Case Comment Notification to Contacts`.
4. Select a template for email notifications.
5. Click **Save**.

Emails sent to external users include a link to the community. If the user receiving the email is a member of multiple active communities, the link goes to the oldest active community. If the user is already logged in to a community and clicks the link in the email, the link goes to that community. If the user is not a member of any community, the link goes to the internal organization. If the user is a member of a portal and a community, the link goes to the community.

Enable Email Drafts in Case Feed

Draft emails let support agents who use Case Feed write and save messages without having to send them immediately. This option also makes it possible to implement approval processes so messages can be reviewed by supervisors or senior agents before they're sent to customers.

Before enabling draft emails, set up Email-to-Case and Case Feed.

1. From Setup, enter *`Support Settings`* in the `Quick Find` box, then select **Support Settings**.
2. Click **Edit**.
3. Select `Enable Email Drafts`.
4. Click **Save**.

Note: Changes to fields other than `To`, `From`, `CC`, `BCC`, and `Subject` in the Email action aren't saved when a message is saved as a draft. We recommend removing any additional fields from the Email action if you plan to use draft emails.

Case Feed Page Layouts Overview

When support agents work with cases in Case Feed, they use the case page layout. To specify the fields, tools, and functionality that support agents see when working with open cases, customize the feed view, detail view, highlights panel in the case page. When agents close a case, they see the close case page layout, where agents can enter information about the case resolution. You also can customize the close case page layout.

You can customize different parts of the case page layout in Case Feed:

- Highlights panels, which appear at the top of both feeds and case detail pages. The highlights panel shows key information about a case so that the most important information is immediately visible to agents.
- Feed views, which agents see when managing and interacting with cases. The feed view shows the case history using a Chatter-like feed, so that agents can see what's happened in a case in context.
- Detail views, which agents see when they click **View Case Details**. The detail view shows useful information about the case, such as a description of the contact's company, the account's address, and related lists.

You also can customize the close case page layout in Case Feed:

- Close case pages, which appear when agents close cases. The close case page lets agents enter information about the case resolution.

From the object management settings for cases, you can create, edit, and assign all four types of layouts by going to Page Layouts.

Customize the Highlights Panel in Case Feed

The highlights panel appears at the top of the feed detail views and shows the most important information about a case. Edit the highlights panel to include the fields that are most important for your support agents.

1. From the object management settings for cases, go to Page Layouts.
2. In Page Layouts for Case Feed users, click next to a layout and choose **Edit detail view**.
3. Hover your mouse pointer over the Highlights Panel until the icon appears, then click it.
4. On the Highlights Panel Properties page, click a box to edit the fields in it.
5. Use the drop-down list to choose the type of information to include in each field. To leave a field blank, choose `None`. You can't move or delete `Case Number` or `Created Date`.
6. Click **OK**.

Create and Edit Feed Layouts in Case Feed

Feed view page layouts determine which actions, fields, and tools users see when they're working with cases in Case Feed. You can create different layouts and assign them to different user profiles. For example, you might have one layout for agents and another for supervisors.

Note: Before creating a new feed view page layout, you need to create a new case detail page layout.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
   - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
   - For a layout in the Page Layouts for Case Feed Users section, click and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose `Edit detail view` to add, change, or remove actions.

3. Choose the tools, components, and options for your feed view page.
4. Click **Save**.

Once you've created or edited feed view page layouts, assign them to profiles.

Settings for Feed Views in Case Feed

Use Case Feed settings to customize the feature according to your support department's processes and business needs.

Apply these settings when you create or update feed views for Case Feed.

Feed View Options

Option	Use It to...	Notes
`Enable Full-Width Feed View in the Console`	Expand the width of the feed to take up all available space when agents view cases in Salesforce console tabs or subtabs.	The portion of the page the feed takes up with this setting enabled depends on whether you have tools or components in the right column of the Case Feed layout, and whether you have console sidebar components. This setting is automatically enabled in organizations created after Summer '14.
`Enable Compact Feed View in the Console`	Update the overall look and feel of the feed view and compress feed items when agents view cases in Salesforce console tabs or subtabs.	Compact feed lets agents see more information about a case with much less scrolling than they need to do when working with cases in the standard feed view. This option is only available if you have `Actions in the Publisher` and `Use Page Layout Editor to Configure Actions` enabled.
`Highlight Externally Visible Feed Items`	Indicate which feed items are visible to external users by changing the background color of the feed item to orange.	This option is only available for compact feed. When this setting and the `Enable Community Case Feed` setting are both enabled, the following feed items are highlighted in the case feed: • Public emails sent to or received from the email address for contact person on a case • Public case comments

Option	Use It to...	Notes
		• All social posts • Questions escalated from Communities • Tasks that have the All with Access/Public setting • Events that have the All with Access/Public setting • Chatter posts that have the All with Access/Public setting See also Set Up the Community Case Feed.

Publisher Options

Option	Use It to...	Notes
`Use Page Layout Editor to Configure Actions`	Make the advanced page layout editor the default for choosing the actions that appear in the Case Feed publisher.	This setting appears only if your organization has `Actions in the Publisher` enabled.
`Automatically Collapse Publisher`	Automatically reduce the height of the publisher when it's not in use, showing more of the feed below. The publisher expands to its normal height as soon as an agent clicks inside it.	This setting is automatically enabled in organizations created after Summer '14 and is only available if you have `Actions in the Publisher` and `Use Page Layout Editor to Configure Actions` enabled.

Choosing and Configuring Actions

Option	Use It to...	Notes
`Menu Placement`	Choose whether you want the publisher menu to appear in the center column or the left column.	This setting appears only if you *haven't* selected `Use Page Layout Editor to Configure Actions`.
`Custom Actions`	Select up to 10 custom Visualforce pages to add to the publisher as actions. Pages must use the standard case controller.	This setting appears only if you *haven't* selected `Use Page Layout Editor to Configure Actions`.
`Select Action`	Select actions to include in the Case Feed publisher, and choose the order in which the actions appear.	This setting appears only if you *haven't* selected `Use Page`

Option	Use It to...	Notes
		`Layout Editor to Configure Actions`.

Log a Call Action

Option	Use It to...	Notes
`Select Action Fields`	Select fields to include in the Log a Call action.	Log a Call automatically includes the `Customer Name` field. You can't include rich text area fields in Case Feed actions.

Change Status Action

Option	Use It to...	Notes
`Select Action Fields`	Select fields to include in the Change Status action.	The Change Status action automatically includes the `Current Status` and `Change to` fields. If you add the `Status` field to the action, it will automatically replace these two fields. You can't include rich text area fields in Case Feed actions.

Email Action

Option	Use It to...	Notes
`Select Action Fields`	Select fields to include in the Email action.	Any fields you add appear below the email body field in the action. You can't include rich text area fields in Case Feed actions.
`Select Header Fields`	Select fields to include in the header of the Email action.	The Email header automatically includes the `From`, `To`, `Bcc`, and `Subject` fields.
`Select Email Tools`	Choose the tools to make available to agents when they use the Email action.	The Templates, File Attachments, and Address Lookup Buttons tools are included automatically.

Option	Use It to...	Notes
`Enable Rich Text Editor`	Make the rich text editor available to agents so they can include formatting, such as bolded or underlined text, bulleted or numbered lists, links, and inline images in their email messages.	Agents can click in the editor's menu bar to switch to plain text mode.
`Require Use of Rich Text Editor`	Prevent agents from switching to plain text mode when they write email.	This setting helps ensure that agents write and send only formatted emails, not plain text messages.
`Specify From Address(es)`	Automatically include specific email addresses in the `From` field.	To use multiple addresses, separate them with commas. They'll appear as a picklist in the Email action header. You can use only Salesforce-validated email addresses as From addresses.
`Allow Collapsible Body Field`	Automatically collapse the email body field until an agent clicks inside it. Having the body collapsed by default makes it easier for agents to see more of what's below the email action on the page.	Once an agent expands the email body, it will stay expanded until the page is reloaded, even if the agent clicks on other actions or elsewhere on the page.
`Allow Collapsible Email Header`	Automatically collapse the email header until an agent clicks to expand it.	With this setting enabled, agents can expand and collapse the header as needed while they work.
`Exclude Email Thread from Drafts`	Exclude the previous emails in the thread when composing emails in the feed.	This prevents the previous emails in the thread from being incorporated in the outbound email message.
`Replace Send Email Button with`	Choose a button to replace the standard **Send Email** button. This can be useful if you want to label the button something else, change how it looks, or include custom functionality, such as triggering a workflow when an agent sends a message.	You can use any custom button you've created for cases, except those that have s-controls as content sources.

Case Feed Tools

Option	Use It to...	Notes
`Select Case Feed Tools`	Choose which tools to make available to agents when they use Case Feed.	The Articles tool is included by default, but it won't appear on the Case Feed page unless your organization uses Salesforce Knowledge.

Articles Tool

Option	Use It to...	Notes
`Enable Email PDF Attachments`	Give agents the ability to attach Knowledge articles to email messages as PDFs.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and *don't* enable this setting, agents will be able to attach articles only to cases, not to email messages.
`Use Case Feed Articles Tool in the Console`	Replace the Knowledge sidebar in the Salesforce console with the Case Feed articles tool.	This setting appears only if your organization uses Salesforce Knowledge. If you use Knowledge and *don't* enable this setting, we recommend hiding either the Case Feed articles tool or the Knowledge sidebar in the Salesforce console so agents see only one of those tools when they're working with cases in the console.

Other Tools and Components

Option	Use It to...	Notes
`Custom Components`	Select up to 10 custom Visualforce pages to add as components. You can use as a custom component any Visualforce page that uses the standard case controller.	Once you add a Visualforce page, you can specify its height and choose where on the page you want it to appear.
`Choose Placement`	Specify where on the page you want tools and components like custom buttons, custom links, and the followers list to appear. You can also choose to hide anything your agents don't need access to.	Custom links and buttons are only available as right sidebar components on the feed view page layout if you've added them to the related case detail page layout. The Milestone Tracker is available only if you've enabled entitlement management in your organization. The Topics list is available only if you've enabled topics on cases.

Filter Options

Option	Use It to...	Notes
`Filters Appear`	Specify where and how feed filters appears: • As a fixed list in the left column • As a floating list in the left column • As a drop-down list in the center column	Choose "As a floating list in the left column" if you want the feed filters list to remain visible as users scroll down the page. This can be useful with long feeds, as it lets agents quickly filter case activities from anywhere on the page, without having to scroll to the top.
`Select Filters`	Choose the filters to include in the feed filters list, and specify the order of the list.	We recommend putting the filters agents are likely to use most often at the top of the list.

Add Custom Actions in Case Feed

Include custom actions in the Case Feed publisher to give support agents easy access to the additional tools and functionality they need when working with cases.

Actions in Case Feed let support agents perform tasks like emailing customers, writing case notes, and changing the status of a case. Using Visualforce pages, you can create custom actions that offer agents more functionality. For example, you might create a Map and Local Search action that lets agents look up the customer's location and find nearby service centers.

You can use any Visualforce page that uses the standard case controller as a custom action.

Note: If you've opted to use the advanced page layout editor to configure the publisher for a Case Feed layout, see Configure the Case Feed Publisher with the Enhanced Page Layout Editor for instructions on adding actions.

1. From the object management settings for cases, go to Page Layouts.
2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.
   - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.
   - For a layout in the Page Layouts for Case Feed Users section, click ▾ and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)
3. Click **+ Add a Visualforce Page** in the list of custom actions.
4. Select the page you want to add as an action.
5. Specify the height of the action in pixels.
6. Click **Save**.

Case Feed Upgrade Results

When you enable Case Feed for your organization, an upgrade process converts active cases to the new interface and creates feed items for activity on those cases.

During the upgrade process, users won't notice anything different. After the process is complete, users for whom you've enabled Case Feed see existing and new cases in the new interface, while users without Case Feed continue to see traditional cases.

Here's what happens when cases are upgraded to the new interface:

- The 5000 most recent, active cases in your organization are converted to the Case Feed interface. How long this takes varies depending on the number of cases being converted and the complexity of the data they contain. For example, cases with multiple email messages or other attachments may take longer to convert than other cases.
- Older cases are also upgraded if they have comments, emails, or logged calls that were added to the case within the date range that applies to the original 5000 converted cases. You can have up to 500 cases with current comments, up to 500 with current emails, and up to 500 with current logged calls for a total of 1500 additional converted cases.
- The following items are added to the feed for each case:
  - Up to 60 email messages.
  - Up to 60 private and public comments. These are converted from comments to Chatter posts during the upgrade.
  - Up to 60 logged calls. Some logged calls that were created before you upgraded to Case Feed may appear in the feed as tasks.
- The Case Feed interface is enabled for all new cases, giving users access to the publisher and feed.
- The Case Detail view becomes available, and contains additional information about the case, including items that remain in their current related lists.

You'll receive an email message once the upgrade process has finished.

Best Practices

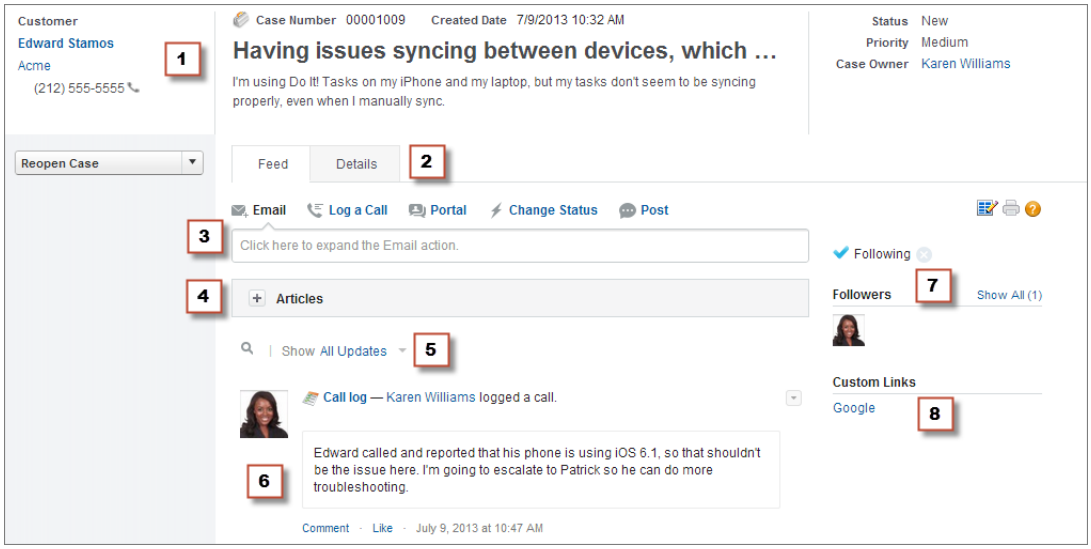
- For the smoothest upgrade experience, we recommend enabling Case Feed in a full-copy sandbox organization before you enable it in your production organization. This helps you determine how long the case conversion process takes and lets you review some sample cases in the new user interface.
- After you enable Case Feed in your production organization, wait until the upgrade process has finished to give users access. We recommend first assigning Case Feed to a single user, who can review some of the converted cases to be sure the upgrade process was successful, and then making it available to other users.

Case Feed Overview

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes actions and a Chatter feed. The actions let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case.

Agents assigned to a Case Feed page layout see a page that typically looks like the page shown in the screenshot when they view a case.

Note: Administrators can customize case page layouts, so your org's page layout may look different from the screenshot.



- **Highlights Panel (1)**—Provides an overview of the most important information about a case, such as the contact information, case name, case description, status, priority, and case owner. Agents can use the column dividers to resize sections of the highlights panel so they can see more of the info that's most relevant.
- **Feed and Detail Views (2)**—From the feed view, which includes the publisher and feed, agents can easily switch to the case detail view to see more in-depth information and work with related lists.
- **Publisher (3)**—Contains the actions agents use to work with cases, such as the Email, Case Note, and Change Status actions.
- **Articles Tool (4)**—Lets agents find Knowledge articles that can help them resolve cases, and then attach them to a case or email them to customers.
- **Feed Filters (5)**—Help agents quickly find specific information in the feed by limiting the feed items that appear.
- **Feed (6)**—Offers a chronological view of the case's history. Feed items are created for:
  - Incoming and outgoing email related to the case
  - Comments related to the case on a customer portal or Chatter Answers
  - Calls logged about the case
  - Changes to the case status
  - Comments made on the case
  - Links or files added to the case
  - Milestone activity related to the case
  - Case actions that result from workflow events
  - New tasks and events related to the cases

- **Follow Button and Followers List (7)**—Let agents follow the case so they're notified in Chatter of updates to it, and let them see other followers.
- **Custom Buttons and Links (8)**—Give agents access to more tools and functionality.

Administrators can customize most aspects of Case Feed, including:

- Fields in the highlight panel
- Actions that appear and the fields they include
- Feed filters that are available and where on the page the list appears
- Width of the feed
- Availability of tools, custom buttons, and custom links, and where they appear on the page

Case Feed and Related Lists

In the traditional case interface, support agents complete tasks such as logging calls and sending emails primarily by working with related lists. In Case Feed, agents can do several of these tasks directly in the feed.

Here's an overview of the most common related lists included in the traditional case interface, the tasks agents do from them, and where agents can complete those tasks in Case Feed.

Activity History

Task	Case Feed Feature Agents Use for this Task
Logging a call	Log a Call action in the publisher
Viewing call logs	Call log feed items
Creating and replying to customer emails	• Email action in the publisher • Emails related list
Viewing emails	• Email feed items • Activity History related list • Emails related list

Approval History

Task	Case Feed Feature Agents Use for this Task
Submitting a case for approval	Approval History related list
Viewing approval history	Approval History related list

Attachments

Task	Case Feed Feature Agents Use for this Task
Attaching files to a case	• Articles tool (to attach Salesforce Knowledge articles) • Attachments related list
Attaching files to an email	• Email action in the publisher • Emails related list
Viewing files attached to a case	• Attachment feed items • Attachments related list

Note: Attachments to case notes aren't included in the Attachments related list.

Case Comments

Task	Case Feed Feature Agents Use for this Task
Creating an internal case note	Post action in the publisher In Case Feed private comments have been replaced by case notes, which are Chatter posts and aren't available from the Case Comments related lists.
Viewing case notes	Post feed items
Creating a public customer comment	Portal action in the publisher
Viewing a public customer comment	Portal feed items

Case History

Task	Case Feed Feature Agents Use for this Task
Viewing case history	Feed items for activity on the case

Case Team

Task	Case Feed Feature Agents Use for this Task
Creating a case team	Case Team related list
Viewing a case team	Case Team related list

Contact Roles

Task	Case Feed Feature Agents Use for this Task
Creating contact roles	Contact Roles related list
Viewing contact roles	Contact Roles related list
Creating and replying to customer emails	Email action in the publisher

Content Deliveries

Task	Case Feed Feature Agents Use for this Task
Viewing or previewing content	Content Deliveries related list
Creating and delivering content	Content Deliveries related list

Emails

Task	Case Feed Feature Agents Use for this Task
Creating customer emails	• Email action in the publisher • Emails related list
Viewing emails	• Email feed items • Activity History related list • Emails related list

Open Activities

Task	Case Feed Feature Agents Use for this Task
Creating and editing tasks	• Create Task action in the publisher • Open Activities related list
Viewing tasks	• Task feed items (for tasks created with Create Task action) • Open Activities related list
Creating and editing events	• Create Event action in the publisher • Open Activities related list
Viewing events	• Task feed items (for events created with Create Event action) • Open Activities related list

Related Cases

Task	Case Feed Feature Agents Use for this Task
Creating and editing related cases	• Create Child Case action in the publisher • Related Cases related list
Viewing related cases	• Related case feed items (for cases created with Create Child Case action) • Related cases related list

Solutions

Task	Case Feed Feature Agents Use for this Task
Viewing suggested solutions	Solutions related list
Finding solutions	Solutions related list