TIPS & HINTS FOR SOLUTIONS

Summary

Resolve cases efficiently with high-quality solutions. Use a consistent structure and customer-focused content.

Basic Solution Structure

Give all of your organization's solutions the same basic structure:

Title

- Provide a brief explanation of what the solution is about.
- Describe the customer's problem or what they are trying to do.

Details

- Restate or paraphrase the customer's question or problem.
- Provide all information to identify and resolve the customer's problem:
  - Identify all symptoms—what is the customer experiencing?
  - Identify the product area—where is the problem occurring?
  - Explain the cause—what is the main cause of the problem?
  - Provide the fix—how is the problem resolved?

    If multiple steps are involved, number them clearly and put them on separate lines for easier reading.

Qualities of Good Solutions

Ensure that your organization's solutions have the following qualities:

Clear Language

Use language that the average customer would understand.

Applicable Content

Think of the content as a potential email to a wide audience. Remove all customer-specific information.

Easy to Read

Make it easy to read. Use line breaks, bullets, and numbering appropriately.

Findable

Include keywords so the solution is easily found in searches.

Categorized

Organize similar solutions into categories. Each solution can belong to more than one category. Limit the number of categories to which a solution belongs. If you put solutions into only the most relevant categories, they will be easier for users and customers to find. For more information, see Categorizing Solutions.

Published

Make it easy for your customers to find solutions by making them available on your Self-Service portal, Customer Portal, or public solutions.

Sample Solution

The following is a sample of a well-written solution:

How do I add more users to my organization?
   Administrators and users with the "Manage Internal Users" permission have the ability to add additional users.

   1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

   2. Click the **New User** button.

   3. Enter the user's name, email address, and other personal information.

   4. Select a profile, such as Standard User, to specify the functions the user is allowed to perform.

   5. Click **Save** to complete the process.

Solution Review Process

When reviewing solutions:

- Check for duplicates—enter a few keywords in the solution search to ensure it is unique.

- Review the content—evaluate the solution for good structure and content.

- Set status—change the solution's `Status` to Reviewed.

- Publish—select the `Visible in Self-Service Portal` checkbox to make the solution available to your customers through the Self-Service portal and Customer Portal. Select the `Visible in Public Knowledge Base` checkbox to make it available from public solutions. (This field only applies to solutions, not articles in the public knowledge base.)

📝 Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

About Solution Managers

- Solution Managers should be senior support representatives with expert product knowledge and excellent written communication skills.

- Solution Managers are responsible for reviewing all solutions and coaching other representatives on how to write good solutions.

- Administrators can make a user a Solution Manager from Setup by entering `Users` in the `Quick Find` box, then selecting **Users** and changing the user's profile to Solution Manager.

HTML Solutions

Your administrator can enable HTML solutions for your organization. Note the following when using HTML solutions:

- HTML solutions replace text solutions. You cannot use both formats.

- If you open a text solution in the HTML editor and save it, it becomes an HTML solution. You may need to reformat solutions that were previously in text format.

- Images and HTML tags are removed from HTML solutions when they are displayed in list views, search results, or reports. Images and HTML tags are included in the Printable View.

- HTML solutions are available to Self-Service portal, Customer Portal, public solutions, and Salesforce users.
- HTML solutions can be created in any of the languages supported by Salesforce.

Special Features of Solutions

- You can attach a file to any solution so that the file can be emailed. Modify the Case Response email template to include the `{!Solution_Attachments}` field.
- You can embed hyperlinks in solutions by entering them as a URL.
- Multilingual solutions allow you to translate your solutions into different languages. For more information, see Multilingual Solutions Overview.
- Suggested solutions allow users and customers to potentially solve their own cases by displaying relevant solutions when a case is submitted or viewed. For more information, see Suggested Solutions Overview.