salesforce

Solutions Implementation Guide

Salesforce, Spring '18

'18

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SOLUTIONS OVERVIEW

The Solutions tab in Salesforce helps you build a central repository of valuable information so your customer support reps and customers using a Self-Service or Customer Portal can quickly answer inquiries at any time. With solutions, your support team can easily capture, review, catalog, and access information that resolves customer issues and improves customer satisfaction.

Note that "Salesforce," "Self-Service," and "Customer Portal" may be used interchangeably in this document. All features covered within this document are included in all three products.

> **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.

Key Benefits

Solutions enable you to:

Centralize
The Solutions tab is a central repository for organizing and finding existing answers to customer support inquiries.

Automate
Set up automatic workflow actions that enhance your solution review and publishing processes.

Share
Provide access to your solutions directly to customers via public solutions and Self-Service or Customer Portal.

About This Guide

Use this guide to get instructions on how to set up, customize, and start using solutions to manage your organization's public solutions. It covers how to implement the most helpful solution features and how to use solutions effectively to maximize your customer support team's productivity. This guide contains the following major topics:

Setup
Provides details on how to implement all of the solution features. Follow the planning checklist at the beginning of each setup section to prepare for the implementation of each feature.

Feature Rollout
Use the feature rollout suggestions to implement the specific features you need to start using solutions.

> **Tip:** For more information on features related to solutions, see the following implementation guides:
> - *Self-Service Implementation Guide*
> - *Customer Portal Implementation Guide*
> - *Case Management Implementation Guide*

SETUP

Follow the setup procedures for each of the following solution features:

Choosing a Solution Manager
Select members of your support team to review and publish your organization's solutions.

Enabling HTML Solutions
By default, Salesforce displays solutions in text. However, you can display and create solutions in HTML format by enabling HTML solutions.

Customizing Fields
Create custom solution fields to track information specific to your solutions.

Enabling Suggested Solutions
Increase productivity by helping users easily find relevant solutions to the cases they are viewing.

Defining Solution Processes and Record Types
Create different solution processes to review different types of solutions.

Customizing Solution Page Layouts
Design your solution page layouts to specify which solution fields are displayed, read-only, or required for your users.

Customizing Solution Search Layouts
Customize which fields display for users in lookup dialogs and the Recent Solutions list on the Solutions tab.

Creating Email Templates
Design email templates to send solutions to customers and users.

Creating Solution Categories
Create categories to group similar solutions so customer support reps and users can easily browse your solutions.

Automating Solution Workflow
Create a workflow rule and alert that automatically notifies solution managers when a solution is ready for review.

Setting Up Multilingual Solutions
Translate solutions and solution categories into the languages supported by Salesforce.

Importing Solutions
Save time by importing your solutions from another application or an Excel spreadsheet.

Enabling Public Solutions
Add a search box and button to your company's website so that customers can find solutions without contacting your support team.

Enabling a Self-Service or Customer Portal
Build a Self-Service or Customer Portal that allows your customers to search solutions, log new cases, and leverage suggested solutions to close cases without contacting a support rep.

Choosing a Solution Manager

Choose one or more members of your support team to review, modify, and publish your organization's solutions to your public knowledge base and Self-Service or Customer Portal. Solution Managers:

- Should be senior support reps with expert product knowledge and excellent written communication skills
- Are responsible for reviewing all solutions and coaching other reps on how to write good solutions

- Are responsible for associating solutions with the correct solution categories

To Make a User a Solution Manager

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

2. Click **Edit** next to a user's name.

3. Select Solution Manager from the `Profile` picklist field.

4. Click **Save**.

Tips on Making a User a Solution Manager

Consider the following when making a user a solution manager:

- If you have Professional, Enterprise, Unlimited, Performance, or Developer Edition, you can add the following permissions to permission sets or custom profiles to grant the relevant solution manager permissions: "View Setup and Configuration", "Manage Published Solutions", and "Import Solutions". For details, see User Permissions and Access.

- The standard Solution Manager profile does not include the "Manage Categories" permission, which gives users the ability to define solution categories. If you want your solution managers to create and manage your solution category tree, create a permission set with this permission and assign it to the users who need it. If you have Professional Edition, only users with the System Administrator profile can create and manage your solution category tree. For more information about solution categories, see Creating Solution Categories on page 12.

Enabling HTML Solutions

You can create and display solutions in either HTML or text. By default, Salesforce displays solutions in text. If you want to create and view solutions in HTML rather than text, you must enable HTML solutions. If you have existing text solutions, they will be converted to HTML when you open them up in the HTML editor.

If you are planning to import HTML solutions, see Importing Solutions on page 18.

Enabling HTML Solutions

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

2. Click **Edit**.

3. Select `Enable HTML Solutions`.

4. Click **Save**.

Tips on Enabling HTML Solutions

Consider the following when enabling HTML solutions:

- For security purposes, Salesforce automatically filters all HTML solutions for potentially malicious HTML. If potentially malicious HTML is detected in an HTML solution, then the potentially malicious HTML is either automatically removed or transformed into text for users who view the HTML solution. Note that users will not be able to notice when potentially malicious HTML is removed from an HTML solution.

- You can enter some free form HTML into HTML solutions. HTML tags are not displayed to users viewing saved HTML solutions. Note that Cascading Style Sheets (CSS) are not supported in HTML solutions. Furthermore, all `<script>` and `<iframe>` tags, as well as all JavaScript, are automatically converted to text when saved in HTML solutions. For a list of the HTML tags you can enter into HTML solutions, see HTML Solutions Overview.

Customizing Fields

If you want to track solution information specific to your organization that is not available using the standard solution fields, you can create custom fields. You can also modify standard picklist fields to fit your business processes. Follow these steps to customize your solution fields:

Planning
    Determine what customizations you need to make.

Creating Custom Fields
    Identify any additional information you would like to track for solutions.

Customizing Standard Status Picklist Values
    Evaluate the solution `Status` field values and determine whether you need to change them.

Creating Validation Rules
    Automatically verify that solutions meet the standards you specify before users can save them.

Tracking Field History
    Set which standard and custom solution fields to track so that you can review who, when, and what has changed on every solution.

Planning

List What Custom Fields You Need
    Track any additional solution information specific to your business by creating custom fields. Create a list of all the solution attributes you want to track. Then, prepare a list of all the custom fields you need to create for each attribute. For example, if you plan on implementing multilingual solutions, you may want to create a long text area field called `Translation Comments` where translators can add any notes regarding the translation process.

Determine What Solution Status Picklist Values You Need
    The solution `Status` field indicates the state of a solution in the process of being reviewed. Some predefined values for this field are Draft and Reviewed. If these values don't match your organization's review process, create a list of solution status values that do. For each value, you can also determine whether that value is the "default" status for all new solutions or a "reviewed" status. Solutions with a reviewed status are displayed separately in solution search results to help support reps distinguish which solutions have been reviewed by solution managers.

    We recommend the following solution status values, although the exact naming and number of review levels will vary depending on your organization's processes:

<table>
<tr><th colspan="2">Recommended Solution <code>Status</code> Values</th></tr>
<tr><th>Status</th><th>Meaning</th></tr>
<tr><td>Draft</td><td>Status for all new solutions. Make this your default status.</td></tr>
</table>

Recommended Solution `Status` Values	
Status	**Meaning**
Review Level 1	Status for solutions that have been through one round of review by a solution manager. Optionally, make this a reviewed status.
	Solution Managers review all Draft solutions to:
	• Check for duplicates
	• Complete the solution
	• Review the solution structure
	• Remove references to any specific customer
	• Add content if necessary
	Status should then be changed to Review Level 1
Review Level 2	Status for solutions that have been through a complete review cycle. Make this a reviewed status.
	Senior Solution Managers review all Review Level 1 solutions to:
	• Determine whether the solution should be published to public solutions and the Self-Service or Customer Portal
	• Change the status to Review Level 2 and select the `Visible in Self-Service Portal` and `Visible in Public Knowledge Base` checkboxes

Determine What Fields You Want to Track on the History Related List of Solutions

Record the date, time, nature of the change, and who made the change on selected fields.

Creating Custom Fields

Create custom solution fields that contain text, dates, picklist values, or other types of data. See Custom Field Types for a comprehensive list of the different types of custom fields.

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

2. Click **New** in the Solution Custom Fields & Relationships section.

3. Choose the type of field to create and click **Next**.

4. Enter a field label, name, and respond to any other prompts. For formula fields, choose a data type for your formula output.

5. Click **Next**.

6. For formula fields:

   a. Select one of the fields listed in the `Select Field` drop-down list.

   b. Click the appropriate operator icon to the right.

   c. Optionally, click the **Advanced Formula** tab to use functions and view additional operators and merge fields.

   Functions are prebuilt formulas that you can customize with your input parameters. See the Salesforce online help for a description of each operator and function.

    d. Optionally, click **Validate Syntax** to check your formula for errors.

    e. Click **Next**.

7. In Enterprise, Unlimited, Performance, and Developer Editions, set the field-level security to determine whether the field should be visible or read only for specific profiles, and click **Next**.

8. Select the page layouts that you want to include the new field.

9. Click **Save**.

Customizing Standard Status Picklist Values

Modify the solution `Status` field values to match your organization's solution review process.

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

2. Click **Edit** next to the `Status` picklist field.

3. Make any changes to the existing values listed:

- Click **New** to add new values.
- Click **Edit** to modify any existing values.

  For the value that you want applied to all new solutions, check the `Default` attribute for that value. We suggest you make "Draft" your default value.

  For any values that you want to indicate that the solution has been reviewed, check the `Reviewed` attribute for that value. We suggest you make "Review Level 2" your reviewed value.

- Click **Reorder** to change the display order of the values in the picklist.

4. Click **Save**.

Creating Validation Rules

You can create validation rules to automatically verify that solutions meet the standards you specify before users can save them. For example, you can create a validation rule that specifies that the `Solution Title` field on a solution cannot contain more than 30 characters. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a message of `True` or `False`.

1. From Setup, enter `Solutions` in the Quick Find box, then select **Validation Rules**.

2. Click **New** in the Validation Rules related list.

3. Enter the properties of your validation rule.

4. Click **Check Syntax** to check your formula for errors.

5. Click **Save**.

> 💡 **Tip:** See Validation Rules for comprehensive information about validation rules.

Tracking Field History

You can select a combination of up to 20 standard and custom fields to track changes on the Solution History related list of solutions. The Solution History related list shows the changes made to tracked fields, including the date, time, nature of the change, and who made the change. History data does not count against your organization's storage limit.

1. From Setup, enter *Solutions* in the Quick Find box, then select **Fields**.

2. Click **Set History Tracking**.

3. Choose the fields you want tracked in the Solution History related list of the solution detail page.

4. Click **Save**.

> 📝 **Note:** Multi-select picklist fields and long text area fields (such as `Solution Details`) are tracked as edited, but their old and new values are not recorded. See Field History Tracking for more information about field history tracking.

Enabling Suggested Solutions

You can enable the **Suggested Solutions** button on case detail pages so that support reps can easily find solutions that may help them solve the particular case they are viewing. The solutions that are suggested for the case are found using an algorithm that automatically scores the relevancy of each solution to the particular case via word frequency, word proximity, case similarity, and related solutions. See Suggested Solutions Overview for comprehensive information about this functionality.

Enabling Suggested Solutions

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

2. Click **Edit**.

3. Select `Enable Suggested Solutions`.

4. Click **Save**.

> 💡 **Tip:** See "Customize the Suggested Solutions Page" in the *Self-Service Implementation Guide* or the *Customer Portal Implementation Guide* for instructions on setting up suggested solutions in your Self-Service or Customer Portal.
>
> When the suggested solutions feature is enabled in your Self-Service or Customer Portals, customers can view suggested solutions when viewing or submitting cases. Viewing suggested solutions may help customers solve a particular case and close the case themselves.

Defining Solution Processes and Record Types

What Are Solution Processes?

You can set up different solution processes to control the steps your users follow for solution reviews. For example, a support team might provide two different levels of solutions: FAQs and technical specifications. Because there is a different level of knowledge in each solution type, the review processes and values in the `Status` field could be different. FAQs could have a two-step review process, whereas technical specifications could have a three-step review process that requires feedback from subject matter experts. By implementing different solution processes, you can have different review cycles for each kind of solution.

What Are Record Types?

Record types are related to solution processes and allow you to control which custom picklist field values and page layouts a user sees. If you want different groups of users to see only certain solution fields or certain custom picklist field values, consider using record types. For example, for your technical specification solutions, you might want to hide certain fields or picklist values from your Standard support reps, but show them to your Premium support reps. Since record types are related to solution processes, typically you would create a separate record type for each solution process you create.

This section contains the following procedures for defining solution processes and record types for your organization:

Planning
> Decide if you want to create different types of solutions with different picklist values and if you need to show different page layouts based on user type.

Creating Solution Processes and Record Types
> Build solution processes and record types.

💡 **Tip:** Alternatively, see Set Up an Approval Process for information about automating approval processes in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step, plus the actions to take when a record is approved, rejected, or first submitted for approval. Approval processes and solution processes are available in Enterprise, Performance, Unlimited, and Developer Editions. Record types are available in Professional, Enterprise, Performance, Unlimited, and Developer Editions.

Planning

Consider the following before implementing solution processes and record types:

Consideration	Description
Do you have different types of solutions you need to deliver?	If your organization uses different kinds of solutions, such as frequently asked questions, troubleshooting tips, and technical specifications, you may want to create different solution processes and record types for them.
Do you have different review processes for different types of solutions?	Make a list of the different solution review processes you want to support and give them each a name. These become your solution processes. Then, identify the various `Status` field picklist values needed for each of these solution processes.
Do you have different types of users using solutions?	If so, you may want to create different solution record types that display specific fields for specific types of users.
Create a list of profiles to assign to each record type.	Prepare a list of what profiles should have access to what record types. These record types contain solution processes, which are how you can assign user profiles to solution processes.
Determine which record types should be associated with each profile.	You can limit a user's access to record types, or users can have more than one record type available to them when creating a record. Be prepared to choose a default record type whenever you apply more than one record type to a profile.

Creating Solution Processes and Record Types

Create solution processes and include them in record types; then associate the record types with user profiles.

1. Create your master picklist values for the solution `Status` field.

2. Create a solution process:

   a. From Setup, enter `Solution Processes` in the Quick Find box, then select **Solution Processes**.

   b. Click **New**.

   c. Choose an existing business process to copy the `Status` picklist values.

    d. Enter a name and description for the new process.

    e. Click **Save**.

    f. Choose values from the Available Values list and add them to the Selected Values list to include those values in the new solution process. Users will be able to choose from the list of selected values when creating and editing solutions with this solution process.

    g. Select a default value.

    h. Click **Save**.

3. Create a record type to associate with the solution process:

    a. From Setup, enter `Solutions` in the Quick Find box, then select **Record Types**.

    b. Click **New**.

    c. Select an existing record type from which to adopt any custom field picklist values.

    d. Select the solution process you created to associate it with the new record type.

    e. Enter a name and description for the new record type.

    f. Check `Active` to activate the new record type.

    g. Check `Enable for Profile` for profiles that should have access to the record type. Also, check the `Make Default` to make the new record type the default for any enabled profile.

    h. Click **Next**.

    i. Select a page layout to use when displaying records of this type.

    j. Click **Save**.

    k. Optionally, click **Edit** next to any custom picklist fields to customize the values included in the new record type.

    l. Click **Save**.

Customizing Solution Page Layouts

You can customize solution page layouts so certain fields are required, read only, or hidden. Review the planning suggestions below before customizing your solution pages.

💡 **Tip:** If your organization will use the Self-Service or Customer Portal, you can configure your solution page layouts to display in both portals. For more information, see the *Self-Service Implementation Guide* and the *Customer Portal Implementation Guide*.

Planning

Before changing your solution page layout, decide how you plan to use them. Make a list of:

- Fields that should be visible
- Fields that should be editable
- Fields that should be required
- Related lists that you want on each page layout
- Custom links that you want on the solution page layout

Modifying Solution Page Layouts

Organizations using Group and Professional Editions cannot create additional page layouts, but they can customize the existing page layouts.

1. From Setup, enter *Solutions* in the `Quick Find` box, then select **Page Layouts**.

2. In Enterprise, Unlimited, Performance, and Developer Edition, click **Edit** next to the solutions page layout you want to modify.

3. If you are using the original page layout editor in Professional Edition, click **Edit** at the top of the page.

4. Modify the page layout as needed.

5. Click **Save**.

   💡 **Tip:** For instructions on creating multiple page layouts, see the *Enterprise Edition Upgrade Guide* or Create Page Layouts.

Customizing Solution Search Layouts

You may want to customize which solution fields display for users in lookup dialogs and the Recent Solutions list on the Solutions tab home page.

Planning
Determine which solution fields users should view in lookup dialogs and in the Recent Solutions list on the Solutions tab home page.

Customize Solution Search Layouts
Specify the fields to show in search layouts.

Planning

Decide which solutions fields would be the most useful for users to view.

* Make a list of solution fields that should be available in the Recent Solutions list on the Solutions tab home page

* Make a list of solution fields that should be available in solution lookup dialogs

* You can add up to ten fields on search layouts, but we recommend five for easy browsing

Customize Solution Search Layouts

You can specify a different set of fields to show in solution lookup dialogs and in the Recent Solutions list on the Solutions tab home page. The settings apply to all users in your organization.

1. From Setup, enter *Solutions* in the Quick Find box, then select **Search Layouts**.

2. Click **Edit** next to the search layout you want to customize.

3. Use the arrows to add or remove fields from the search layout, and to define the order in which the fields should display.

4. Click **Save**.

   💡 **Tip:** See Customize Search Layouts for more information on what fields can be included in search layouts.

Creating Email Templates

Create email templates to send solutions to customers, and to use in solution workflow actions and approval processes for Enterprise, Unlimited, Performance, and Developer Edition organizations. Use Salesforce to make these email templates match your company's messaging and branding.

Planning

Outline the email templates your organization needs.

Creating Email Templates

Design your email templates with your company brand and messaging.

Planning

Begin by creating email templates using the appropriate Salesforce merge fields. Merge fields are placeholders for variable text that you want replaced with data from your Salesforce records.

Determine the types of email templates you need. You may need email templates for:

- Your support reps to use when communicating solutions to customers

  Make all external communication consistent by having support reps use the same email template that contains your company's solutions.

- Automated workflow or approval processes to notify solution managers to review solutions

  Notify solution managers that a solution has been created and is ready for review.

💡 **Tip:** Determine how you want to organize your email templates. You may want to store them in folders to ensure that they are available to the appropriate users. For information about creating and using folders for email templates, see Managing Folders.

Creating Email Templates

Create email templates so your users can use consistent messaging in their outgoing emails. The following procedure describes how to create a plain text email template:

1. From Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.
2. Click **New Template**.
3. Choose `Text` and click **Next**.
4. Select a folder in which to store the template.
5. Check `Available For Use` if you would like users to be able to select this template when sending an email.
6. Enter a name for the template.
7. Choose an encoding setting.
8. Enter a description for the template.
9. Enter the email subject.

   Insert any merge fields to be replaced with data when entering the subject or email body. For example, you may want to include the `Solution Title` and `Solution Details` fields on templates used to notify solution managers that a new solution is ready for review. You may also want to include the `Suggested Solutions` merge field on email templates used for auto-response rules on cases. The `Suggested Solutions` merge field provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries.

10. Enter the text of your email message in the `Email Body` section. You can include merge fields in the email body as well.

11. Click **Save**.

> 💡 Tip: See Email Templates in Salesforce Classic for instructions on creating letterhead-based HTML email templates, custom HTML email templates, and Visualforce email templates.

Creating Solution Categories

Create solution categories to keep solutions organized and to allow users to easily navigate your public solutions.

Planning

Determine which categories you need to create.

Defining Solution Categories

Build the categories your organization needs.

Categorizing Solutions

Group similar solutions together.

Enabling Category Browsing

Activate category browsing on the Solutions tab and for customers using public solutions and a Self-Service or Customer Portal.

> 💡 Tip: See the following for instructions on setting up a portal:
> - *Self-Service Implementation Guide*
> - *Customer Portal Implementation Guide*

Planning

Planning Solution Categories	
Consideration	**Description**
Find similarities within your solutions.	Make a list of any similarities that your existing solutions may share. Decide whether these similarities could be expanded into categories or subcategories for quick and easy browsing.
Determine the categories your support reps and customers need.	Note the most common subjects that your support reps frequently work with to answer customer inquiries, and categorize your solutions according to those subjects.
Design the order in which categories display.	Decide where to place your categories in the category hierarchy, perhaps placing the most frequently used categories at the top. Choose whether subcategories should display in a custom or alphabetical order.
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.
Design your category hierarchy to hide internal solutions from customers.	If your organization plans to expose categories in public solutions, Self-Service Portal, or Customer Portal, design your hierarchy so that sensitive, internal-only solutions cannot be viewed by customers.

Planning Solution Categories	
Consideration	**Description**
	In the public solutions portals, you must choose one category as the top-level category, and all categories under it will be exposed. To accommodate this, we recommend that you create two top-level categories called "Internal Solutions" and "Customer Solutions."

Defining Solution Categories

Create your solution categories. The All Solutions category is automatically created for you as the top of your solution hierarchy. Users cannot add solutions to this category or translate it.

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

2. Click **Add Category** to create a subcategory below a specific category.

3. Enter the category name.

    Category names cannot include the backslash "\" character.

4. Select a different parent category, if desired.

    The parent category is the category directly above this category in the hierarchy.

5. Select a sort order for any subcategories you create under this category. Choose Alphabetical Order to sort subcategories alphabetically, or choose Custom Order to sort subcategories in the order you specify.

6. Click **Save**.

> 💡 Tip: Select **Edit** to modify the category name, parent category, or sort order. Select **Del** to delete the category. (Solutions associated with the category are not deleted.) Click **New** to add a subcategory.

Categorizing Solutions

Administrators and users with the "Manage Categories" permission can categorize existing solutions prior to enabling solution categories. Once solution category browsing is enabled, all users with the appropriate permissions can categorize solutions.

For the most effective rollout of categories, we recommend that a select group of users with the "Manage Categories" permission categorizes all solutions before you enable solution category browsing for your entire support team.

To categorize solutions:

1. View the solution you want to categorize.

2. Click **Select Categories** in the Solution Categories related list.

    This related list is not visible unless you have defined and enabled categories, or you have the "Manage Categories" permission.

3. In the solution category hierarchy, click **Select** to add a category to the solution. Repeat until you have added all applicable categories.

    If necessary, click **Deselect** to remove a category from the solution.

4. Click **Save**.

Enabling Category Browsing

Once your solutions are categorized, you can enable categories so that users can browse for and find solutions by category from the Solutions tab or when solving a case. If enabled, your customers can browse solutions categories from public solutions, the Self-Service Portal, or the Customer Portal.

- To enable category browsing for your organization or Customer Portal
- To enable category browsing for public solutions
- To enable category browsing for your Self-Service portal

To enable category browsing for your organization or Customer Portal:

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

2. Click **Edit**.

3. Select `Enable solution browsing`.

4. Click **Save**.

To enable category browsing for public solutions:

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

2. Click **Edit**.

3. Select `Enable Solution Browsing`.

4. Click the lookup icon next to `Top-Level Category for Public Solutions` to choose the top-level category accessible by customers in public solutions. Customers can view all solutions in this category and its subcategories if the solutions are marked `Published` and `Visible in Public Knowledge Base`.

   Visible in Public Knowledge Base only applies to solutions, not articles in the public knowledge base.

5. Click **Save**.

To enable category browsing for your Self-Service portal:

1. From Setup, enter `Self-Service Portal` in the `Quick Find` box, then select **Settings**.

2. Click **Self-Service Setup**.

3. Select `Enable Solution Browsing`.

4. Click the lookup icon next to `Top-Level Category for Self-Service Portal` to choose the top-level category accessible by customers. Customers can view all solutions in this category and its subcategories if the solutions are marked `Visible in Self-Service Portal`.

5. Click **Save**.

Automating Solution Workflow

Create a workflow rule and alert that automatically sends an email notification to solution managers when a new solution is created and ready for review.

Planning

Decide which solution managers should receive email notifications when a solution is created.

Creating a Workflow Alert

Build a workflow rule and alert to standardize your organization's solution review process.

💡 **Tip:** Alternatively, see Set Up an Approval Process for information about automating approval processes in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step, plus the actions to take when a record is approved, rejected, or first submitted for approval.

Approval processes, solution workflow, and workflow alerts are available in Enterprise, Unlimited, Performance, and Developer Editions only.

Planning

Decide which solution managers should be notified when a new solution is created

Your solution review process may have different solution managers review solutions at various stages. Choose solution managers involved in the first stage of review.

Choose or create an appropriate email notification template

Select an email template that includes useful information about a new solution. For example, you may want to include the `Solution Title` and `Solution Details` merge fields on the notification template so that solution managers can preview the contents of the new solution. See Creating Email Templates on page 11.

Creating a Workflow Alert

Set up Salesforce to automatically send email alerts based on your organization's workflow.

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

2. Click **New Rule**.

3. Choose Solution and click **Next**.

4. Enter a `Rule Name`, such as `Review New Solution`. Optionally, enter a description for the new rule.

5. Set the evaluation criteria to `Evaluate the rule when a record is: created`. This fires the rule for newly created solutions only.

6. Enter the following rule criteria: `Status equals Draft`.

7. Click **Save & Next**.

8. Click **New Email Alert** from the **Add Workflow Action** drop-down button.

9. Enter a `Description` for the new alert, such as `New Solution Alert`.

   The `Unique Name` field is automatically updated with a value that is similar to the value you entered in the `Description` field. However, you may need to update the `Unique Name` field if its value is not unique to your organization.

10. Choose an email template for the alert to use.

11. Select the type of recipient and choose solution managers from the list displayed.

12. Enter up to five additional email addresses if needed. These can be outside of Salesforce.

13. Click **Save**.

💡 **Tip:** See Workflow for more information about automating your business processes. Workflow is available for Enterprise, Unlimited, Performance, and Developer Editions.

Setting Up Multilingual Solutions

Set up multilingual solutions to help you translate solutions and solution categories into the languages supported by Salesforce. Multilingual solutions allows your customers and support reps to find answers to inquires in the language with which they are most comfortable.

Review the following terms for multilingual solutions:

Master Solution

A solution created in any language supported by Salesforce. A master solution can have zero or more translations associated with it; it cannot be linked to another master solution.

Translated Solution

A solution translated into another language supported by Salesforce and associated with exactly one master solution. A translated solution cannot have the same language as its master solution or any other translated solutions associated with that master solution. A translated solution cannot have other translated solutions associated with it.

Follow these steps to set up multilingual solutions:

Preparation

Determine the languages in which you want to translate your solutions and solution categories.

Translating Solution Categories

Translate your organization's solution categories into the same languages used to translate your solutions.

Enabling Multilingual Solutions

Activate multilingual solutions.

> 💡 Tip: For comprehensive information about multilingual solutions, see Multilingual Solutions Overview.
>
> For a list of the languages that Salesforce supports, see Supported Languages .

Preparation

Before Enabling Multilingual Solutions	
Consideration	**Description**
Choose the languages in which to translate your solutions and solution categories.	Determine which languages your organization needs to support for solutions and their categories.
Determine where to enable multilingual solutions.	You can enable multilingual solutions for your organization's Solutions tab, public solutions, Self-Service Portal, and Customer Portal. Choose where multilingual solutions should be available based on which Salesforce features you have implemented and on your support center's preference for answering customer inquiries.
Provide translators with the appropriate user permissions.	Grant users who will translate solutions "Create" and "Edit" permissions on solutions. Grant users who will translate solution categories the "Manage Translation" permission.
Run solution reports to locate any existing solutions that are already translated.	Solutions that are already translated need to be converted to translated solutions and associated with an appropriate master solution after you enable multilingual solutions. This is because

Before Enabling Multilingual Solutions	
Consideration	**Description**
	when multilingual solutions is enabled, all solutions automatically become master solutions, and you will want to associate any existing translations appropriately.
	You can create a translated solution from a master solution by associating that translation with a master solution of a different language via the `Master Solution` lookup field.

Translating Solution Categories

Translate your organization's solution categories into the same languages used to translate your solutions. Translated solutions inherit the solution categories of the master solution with which they are associated.

1. To add a language, you want to support in the Translation Workbench:

   a. From Setup, enter `Translation Settings` in the Quick Find box, then select **Translation Settings**.

   b. Click **Add**.

   c. Choose a language.

   d. Select translators for this language.

   e. Click **Save**.

2. From Setup, enter `Translate Categories` in the Quick Find box, then select **Translate Categories**.

3. To see a list of terms available for translation, select a language.

4. Click **Edit**.

5. Enter translated terms.

6. Click **Save**.

   💡 Tip: For comprehensive information about the Translation Workbench, see Enable and Disable the Translation Workbench.

Enabling Multilingual Solutions

Activate multilingual solutions. When multilingual solutions is enabled, all existing solutions automatically become master solutions.

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

2. Click **Edit**.

3. Select `Enable Multilingual Solutions`. Optionally, to allow customers to view solution search results in a specific language or all supported languages via a drop-down list, select:

   a. `Enable Multilingual Solution Search in Self-Service Portal`

   b. `Enable Multilingual Solution Search for Public Solutions`

4. Click **Save**.

5. Customize solution page layouts to include the `Master Solution Title`, `Master Solution Details`, and `Out of Date` fields, as well as the Translated Solutions related list:

    a. From Setup, enter `Solutions` in the Quick Find box, then select **Page Layouts**.

    b. In Enterprise, Unlimited, Performance, and Developer Edition organizations, click **Edit** next to the name of the appropriate page layout.

    c. Optionally, you can make solution edit pages easier for users to translate multilingual solutions by setting the Detail Information section to two columns and placing the `Master Solution Title` and `Master Solution Details` fields alongside each other so that users can effortlessly compare master and translated solutions.

    d. Click **Save**.

6. To allow users to associate translated solutions with master solutions, set the field-level security settings of the `Master Solution` lookup field to editable for profiles with Create and Edit permissions on solutions:

    a. From Setup, enter `Solutions` in the Quick Find box, then select **Fields**.

    b. Select the `Master Solution` field.

    c. Click **Set Field-Level Security**.

       Field-level security is available in Enterprise, Unlimited, Performance, and Developer Editions only.

    d. Select **Visible** for profiles with Create and Edit permissions on solutions.

    e. Click **Save**.

7. As a best practice, add a long text area custom field to solutions called `Translation Comments`, and include it on solution page layouts so that users can add any comments regarding the translation of a solution.

Importing Solutions

Importing your solution data is simple regardless of what application you are using. If you are using an application that allows you to export data into a comma separated values format (CSV), you can import that data into Salesforce.

The import process consists of four main steps:

1. Planning

2. Exporting Your Data

3. Preparing Your Import File

4. Importing Your File into Salesforce

💡 Tip: Optionally, you can use the Data Loader to import and update large numbers of solutions. For more information about the Data Loader, see Data Loader.

Planning

Before you import your data from another source:

Determine if you need to create custom fields
You may want to import data into Salesforce that Salesforce does not track in any standard fields.

Determine the languages in which to import solutions
If you have enabled multilingual solutions, then you must prepare a unique import file for each language, because the import process only supports importing one language at a time. For each translated solution, include the 15- to 18-character Solution ID of its master solution in an import file column named "master solution ID." This will help prevent having to manually associate translated solutions with master solutions after importing.

Exporting Your Data

Exporting your data takes place outside of Salesforce. Use your current application to create an export file of all your data.

The steps for this part of the procedure differ depending on the application you are using. Consult the help for the exact instructions for your application. For most applications, click **File** > **Export** to get started exporting your data.

Preparing Your Import File

Now that you have a CSV file, you can open it in an application like Microsoft® Excel®. Check to make sure that the data is correct and columns contain the right information. You may need to create custom fields for any extra columns. You may also need to change the column headers so that your data easily maps to Salesforce fields. See the examples of field mappings below.

Solution Fields	
Label for Your Import File	**Salesforce Field**
Title	Solution Title
Body	Solution Details

> 📝 **Note:** You can enter HTML into the solutions you plan to import into Salesforce. However, unless your organization has enabled HTML solutions, the HTML tags will display in the solutions after they are imported. For more information on the HTML tags you can import with your solutions, see HTML Solutions Overview.
>
> For more information on preparing your import file and mapping fields, see Prepare Your Data for Import.

Importing Your File into Salesforce

Start the import wizard and follow the wizard prompts. After receiving your responses, it puts your exported data into the designated fields in Salesforce.

1. From Setup, enter `Data Import Wizard` in the `Quick Find` box, then select **Data Import Wizard**.

2. Click **Launh Wizard!**

Enabling Public Solutions

Using HTML code supplied by Salesforce, in cooperation with your website administrator, you can add a special search box and button to your website to allow customers to search your public solutions without having to contact your support center.

Public solutions are different from a Self-Service and Customer Portal because users are not required to log in, and they can only search for solutions, not submit cases.

Planning

Decide which solutions should be available to customers.

Enabling Public Solutions

Enable Web access to solutions.

Planning

Before you enable public solutions:

Ask your website administrator if your site supports frames

The public solutions search box and button are displayed in a frame. Your website must support frames in order for the solution search feature to work.

Determine if there are any solutions that should *not* be made publicly available

Search for solutions used for internal purposes only. Verify that they are not marked `Visible in Public Knowledge Base`. (This field only applies to solutions, not articles in the public knowledge base.)

Choose which solutions should be publicly available

Select the `Visible in Public Knowledge Base` field on each solution you want available as a public solution, and make sure the solution has a reviewed `Status`. Solutions with a draft `Status` cannot be accessed from public solutions. (**Visible in Public Knowledge Base** only applies to solutions, not articles in the public knowledge base.)

Add or remove any solution attachments

All attachments associated with solutions marked `Visible in Public Knowledge Base` will be available as public solutions. Determine if you should add or remove any attachments. (**Visible in Public Knowledge Base** only applies to solutions, not articles in the public knowledge base.)

Decide if you want customers to browse solutions by category

If your organization uses solution categories, you can make those categories available for public solutions. To build categories, see Creating Solution Categories on page 12.

Decide if you want to rename the term "Solutions" for public solutions

You can change the word or phrase that is used to describe public solutions. For example, your company may prefer to use "FAQ" instead of "Solutions."

Enabling Public Solutions

To allow customers to access public solutions via the Web:

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

2. Click **Edit**.

3. Select `Public Solutions Enabled`.

4. If your organization uses solution categories, select `Enable Solution Browsing` to allow customers to browse solutions by category on public solutions.

5. If desired, you can change the appearance of the frame on your website by specifying the `Maximum Page Width` and `Minimum Page Height`.

6. Provide the URL of your CSS file in `Style Sheet URL`. The CSS file does not have to exist yet; you can download a sample file as a starting point later, or use your own file.

7. If desired, change the word or phrase that is used to describe solutions for public solutions using the `Alternative Term` fields. Provide singular and plural versions of the term.

8. Click **Save**.

9. If desired, click **Download Sample CSS File** to get the Salesforce style sheet.

10. Click **Generate HTML**.

11. Copy the resulting HTML code and click **Finished**.

12. Send the HTML (and the CSS file, if you downloaded it) to your website administrator to be added to your website.

Enabling a Self-Service or Customer Portal

You can enable a Self-Service or Customer Portal that allows your customers to resolve their inquiries 24/7 without contacting a customer support rep. Customers can search for solutions, check their existing cases, log new cases, and leverage suggested solutions to close cases.

See the following documents for instructions on setting up a portal, including how to list up to five solutions of your choice on the home page users see when they first log in:

- *Self-Service > Implementation Guide*
- *Customer Portal Implementation Guide*

FEATURE ROLLOUT

This section lists recommendations for rolling out solutions to users.

Solution Process Overview
> Explain the basic steps of creating and reviewing a solution.

Training Users to Create Solutions
> Train your users how to create solutions that are reusable and easy to understand.

Training Solution Managers to Review Solutions
> Train solution managers how to review and update solutions.

Key Reports
> Design simple reports for users.

Solution Process Overview

This section lists the four basic steps that a support team follows during the process of creating and publishing a solution.

Verify a Solution Is Needed
> Check that a solution is needed to address a specific inquiry. Make sure that no solution already answers the inquiry by searching on the Solutions tab or on the Solutions related list of a case.

Create a Draft Solution
> Enter the title and details of a new solution. Double-check the solution for accuracy, language, structure, and readability.
>
> When satisfied with the quality of the solution, select Draft from the `Status` picklist field and save the solution. Then, select the appropriate categories with which the solution should be associated.

Review the Solution
> Review level 1 solution managers are notified via a workflow alert that a new solution is ready for review. They check for duplicate solutions, and if none are found, they review the solution for accuracy, make sure it meets their organization's solution standards, and update the solution's content if necessary.
>
> Solution managers also verify that the solution is associated with the correct categories. When satisfied with the quality of the solution, they select Review Level 1 from the `Status` picklist field and save the solution.

Publish the Solution
> Review level 2 solution managers report on solutions with a Review Level 1 status. They review the solution for accuracy and make sure it meets their organization's solution standards. They decide whether to publish each solution to public solutions and Self-Service or Customer Portal. Before finishing, they select Review Level 2 from the `Status` picklist field and save the solution.

💡 **Tip:** For best practices, see the *Tips & Hints for Solutions* tip sheet.

Training Users to Create Solutions

We recommend training your users to create solutions that meet the following guidelines so that solutions can easily be found and understood:

Language

- Write clearly and concisely using simple words and short sentences.

- Use terms that your audience will understand.

- Describe the issue fully, including all facts and symptoms.

- Avoid any customer-specific information so that the solution can be reused.

Structure

- Use a consistent format that includes a title, the symptoms, the cause, and the resolution.

- Use line breaks, bullets, and numbered steps so the solution is easy to read.

Searchable

- Include any alternate or informal names that your audience uses to refer to your products.

- Include appropriate keywords so the solution can be found by multiple troubleshooting paths and by different people who will describe problems in different ways.

- Group related solutions together into logical categories.

Accuracy

- Verify the information is accurate and up-to-date.

Training Solution Managers to Review Solutions

To maintain high-quality solutions, we recommend training solution managers to follow the solution review process below:

Check for Duplicates

Make sure that a solution being reviewed does not already exist. On the Solutions tab, search for pertinent keywords to find existing solutions for the same issue.

Enforce Guidelines

Verify that the solution follows your organization's solution guidelines for language, structure, and accuracy. For details, see Training Users to Create Solutions.

Change Status

After reviewing the solution, change its status to the next status of your organization's solution review process.

Publish the Solution

Select the `Visible in Self-Service Portal` checkbox to make the solution available to customers who access your Self-Service or Customer Portal, and select the `Visible in Public Knowledge Base` checkbox to make the solution available to customers who access your public solutions. **Visible in Public Knowledge Base** only applies to solutions, not articles in the public knowledge base.

Key Reports

Use the Reports tab to view and analyze your solution data. The Support Reports folder includes default solution reports such as Solution List, Translated Solutions, and Solution History. You can also create custom solution reports: click **Create New Custom Report**, select Customer Support Reports, and then select Solutions.

Some examples of solution reports include:

Solutions that Need Review Report

To see which solutions need to be reviewed by solution managers, you can create a custom report of type Solutions and use the advanced report filters to enter the following criteria: *Reviewed equals False*.

Solutions with Number of Related Cases Report

To see which solutions are most frequently associated with cases by your support reps, you can create a custom report of type Solutions and display the `Num Related Cases` field.

Solution Categories Report

If you enabled solution categories for your organization, you can create a custom report of type Solution Categories to verify that all solutions are categorized correctly. To find any uncategorized solutions, use the advanced report filters; choose the `Category Name` field and the "equals" operator, and leave the third field blank.

Solution History Report

Choose the Solution History report type to track the history of standard and custom fields on solutions where field histories are set to tracked. Use this report to see the old and new values of tracked fields.

Translated Solutions Report

If you enabled multilingual solutions for your organization, you can choose the Translated Solutions report type to see which translated solutions are marked `Out of Date` and may need translating.

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