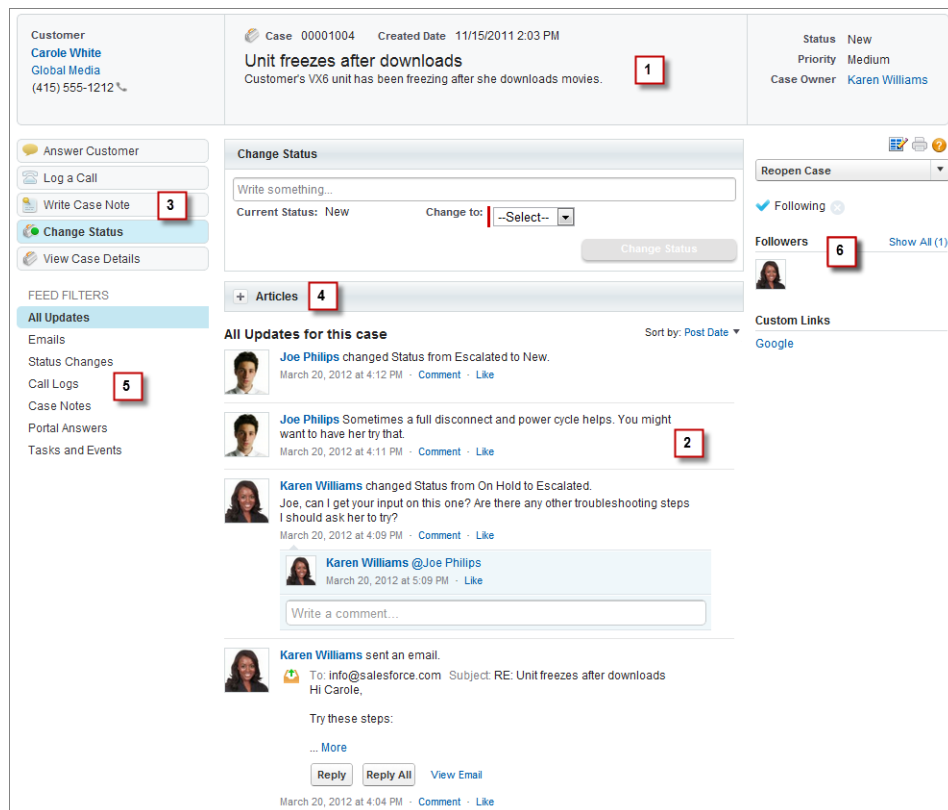# GETTING TO KNOW CASE FEED

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

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

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

Case Feed Overview

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

Case Feed includes these features:

1. **Highlights panel**. Shows the most important information about a case at the top of the page.

2. **Chatter feed**. Lists updates made to the case.

3. **Publisher tools**. Let you communicate with customers, log calls, write case notes, and view details about the case, all from within the feed.

4. **Articles tool**. Makes it easy to search for Salesforce Knowledge articles and attach them to the case or email them to the customer.

5. **Feed Filters**. Filters case activities by type for a one-click view, such as a view of all emails associated with the case.

6. **Followers**. Lists case followers so you can easily see the other agents who are involved in resolving the customer's issue.

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

Viewing Case Information

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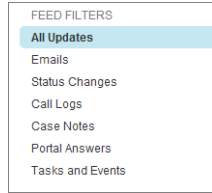
Feed

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

Feed Filters

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

Highlights Panel

The highlights panel at the top of the page shows key information about the case, such as the customer's name and contact information, the date the case was created, and the case owner. Your administrator can customize this panel to include the information that's most relevant to your team. Contacts, accounts, case owners, and other related fields appear in the panel as links; click one to go to its detail page.

Case Detail Page

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

Working on a Case

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

Email
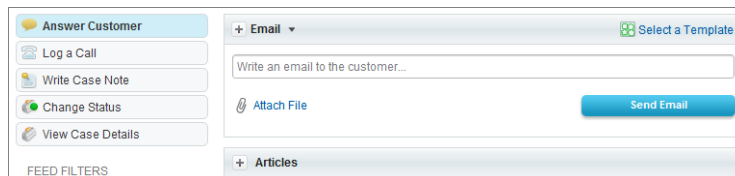
Click **Answer Customer** and choose `Email` to reply to the customer by email. You can use the Rich Text Editor and templates to format your message. For details, see "Customize Emails with the Rich Text Editor in the Salesforce Classic Case Feed" and "Use Email Templates in the Salesforce Classic Case Feed" in the Salesforce online help.
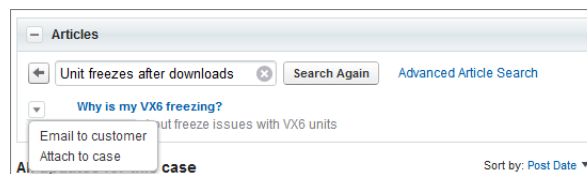
If your organization has Salesforce Knowledge enabled, you can use the articles tool to search for articles relevant to the case and email them to the customer. Check out "Find, Attach, and Email Articles with the Case Feed Articles Tool" in the Salesforce online help for more information .
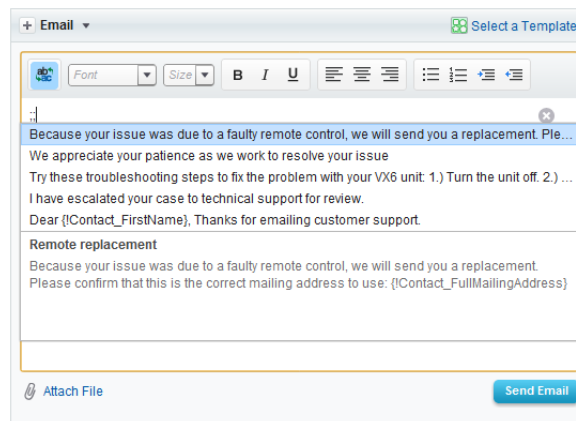
If your organization has Quick Text enabled, you can insert short pre-written messages into your emails. Type `;;` to bring up the list of available messages. Click one to see the full text of the message, and click it again to add it to your email.

Portal Answers

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

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

Logging Calls

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

Case Status

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

Collaborating with Others on Cases

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

Case Notes, Mentions, and Keywords

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

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

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

Learning More

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