GETTING THE MOST FROM YOUR SELF-SERVICE AND CUSTOMER PORTALS

Summary

Salesforce portals allow your customers to resolve their inquiries 24/7 without contacting a customer service representative. Customers can check their existing cases, log new cases, leverage suggested solutions to close cases, or search for solutions.

Self-Service Portal Availability

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.

Self-Service and Customer Portal Benefits

In the Self-Service and Customer Portals, your customers can:

- Log new cases.
- View open and closed cases.
- Add comments to open cases.
- Upload files to open cases.
- Find answers by searching public solutions.
- Resolve cases themselves by using suggested solutions.

As an administrator, you can customize your company's Self-Service and Customer Portals to meet your business needs:

- Display your corporate branding around the portal by presenting it in your company's website using HTML frames.
- Customize themes and style sheets to apply branding to the portal; a point-and-click color theme editor is available.
- Rename the Cases and Solutions tabs to reflect your customers' preferred terminology.
- Choose which fields to display on the portal.
- Control which case comments are public.
- Specify the case owners who receive email notifications when users add case comments.
- Define auto-response rules and email alerts that send emails to your customers, such as messages with links to relevant solutions.

For More Hints

For more hints on customizing your Self-Service and Customer Portals, see the Salesforce online help.

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Managing Portal Users

Portal Super Users

You can enable portal super users, who can view cases, add comments, and upload attachments for all cases submitted by anyone in their company.

To access your company's portal, your customers need:

- A contact record in Salesforce that is enabled for a Self-Service or Customer Portal.
- A valid username and password for the portal.

Contacts with active Self-Service and Customer Portal users cannot be deleted, nor can you delete accounts associated with those contacts.

To enable an individual new Self-Service user, click **Enable Self-Service** on the contact. To enable a new Customer Portal user, click **Enable Customer Portal User** on the contact.

- Be sure the contact has an email address, which will be the default username for the portal.
- Select `Generate new password and notify user immediately` to email a username and password to the contact. The message can be customized using email templates.

To enable multiple Self-Service users at the same time, from Setup, enter *`Users`* in the `Quick Find` box, then select **Users**. For information on enabling multiple Customer Portal users at the same time, see the *SOAP API Developer Guide*.

In addition, you can:

- Reset portal users' passwords.
- Deactivate portal users.
- Use the Self-Service Usage report to track cases, comments, and solution searches for portal users.
- Track your Self-Service users by running contact reports that include Self-Service fields.
- Report on the `Closed by Self-Service User` field to see how many cases have been closed by Self-Service users via suggested solutions.

Tip: To help your customers answer their own inquiries using your Self-Service and Customer Portals, download, customize, and distribute the *Using the Self-Service Portal* tip sheet.

Maintaining Your Self-Service and Customer Portals

Administering Self-Service and Customer Portals requires the following permissions:

- Updating the Self-Service Portal setup requires the “Manage Self-Service Portal” and “Customize Application” permissions.
- Updating the Customer Portal setup requires the “Customize Application” permission.
- Managing Self-Service users and Customer Portal users requires the “Edit Self-Service Users” permission.

To keep your portals up-to-date, you can:

- Update the Login page messages regularly to let users know about new products and events. Also, rotate the featured solutions on your Home page.
- Add visual appeal to your messages using HTML email templates. Use the formatting toolbar to add a logo, link, or colorful text without knowing HTML.
- Match your company's branding by editing the color theme of the portal using the point-and-click editor.
- Continue to build and refine your public solutions.