



TIPS & HINTS FOR SUPPORT REPS

Web-to-Case

- Depending on your setup, online cases are automatically assigned to a user or queue.
- Choose the My Open Cases list view to see your assigned cases.
- View your team's queue list view to take cases from the queue.

1. Identify and Qualify the Customer

When Customers contact you with support issues via phone, email, or Web, you must first identify and qualify the customer:

- From the Cases tab, search for the customer's account.
Optionally, if your organization uses the Console tab, select Cases from the top left drop-down list in the console's list view, then select a list view of cases. For more information on the console, see the Salesforce online help.
- If necessary, verify that the customer is eligible for support.
- Locate the correct contact on the account and display it. Or, click **New** in the Contacts related list to create a new contact.
- For cases submitted via Web-to-Case, Salesforce automatically links the case to an existing contact based on the person's email address. If a contact does not yet exist, create a new one and associate it to the case.

2. Capture the Case Detail

Capture and record the case details reported by the customer:

- From the contact, click **New Case** in the Cases related list.
- Enter the information, and click **Save**.

For online cases, the customer completes case details.

3. Research and Resolve the Case

Research the issue and resolve the case using your organization's solutions:

- In the Solutions related list of the case, enter keywords related to possible solutions. If your organization uses categories, select a category to search. Click **Find Solution**. Alternatively, if the suggested solutions feature is enabled, click **View Suggested Solutions** to find solutions relevant to the case.
- A list of possible solutions is displayed. Attach a relevant solution to the case by clicking **Select** next to a reviewed solution, or by selecting an unreviewed solution and clicking **Select** on the solution detail page.

Working Cases

- Use Case Comments to record additional information as you work on the case.
- Use the Parent Case field to associate the case to similar cases for easy tracking.

4. Communicate with the Customer

Email the customer with the solution to the issue:

- From the case, click **Send An Email** in the Activity History related list.
- Click **Select Template** to choose a customer support email template.
- Complete the email, and click **Send** to email the solution to the customer.

Email Templates

Your administrator can create or customize templates to include case and solution info.

5. Close the Case

The final step is to close the customer's case:

- From the case record, click **Close Case**.
- Change the case status and reason, and enter any internal comments.
- Click **Save**.

Creating Solutions

If you cannot find a solution, enter solution details when closing the case.