Self-Service Portal Implementation Guide

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SELF-SERVICE IMPLEMENTATION

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

This guide outlines the necessary steps to set up and use Self-Service. The guide is divided into the following major sections:

- Self-Service Preparation

  Make sure your organization is ready for a Self-Service portal.

- Self-Service Setup

  Configure Salesforce to allow your customers to use Self-Service by taking these steps.

- Self-Service Reporting

  Use Self-Service reporting features to make the most of your Self-Service portal.

- Example Self-Service Implementation

  Review a sample Self-Service implementation.

SELF-SERVICE PREPARATION

We recommend you complete the following steps before you implement your organization's Self-Service portal.

- Build & Publish Public Solutions

  Build your company's public solutions.

- Identify Self-Service Users

  Decide which customers will be able to use the Self-Service portal.

- Determine the Information Your Users Need

  Identify the fields necessary for customers to log and view cases.

- Customize Case Fields

  Create values for case fields so Self-Service users can close their own cases.

- Customize Email Templates

  Create standard Self-Service email templates.

- Customize and Distribute the Self-Service Tip Sheet

  Edit the Self-Service tip sheet and distribute it to customers.

Build & Publish Public Solutions

Using your Self-Service portal, your customers will be able to search your organization's knowledge base to find answers to their questions and problems. Public solutions will consist entirely of solutions that your Customer Support team has created in Salesforce.

We recommend you complete these steps to build public solutions:

- **Formalize a standard structure for all solutions in Salesforce**

  Use a consistent format when creating your organization's solutions. Every Customer Support representative should be familiar with and able to create solutions using this format.

  Please refer to the *Tips & Hints for Solutions* document for recommendations on structuring solutions (available in the *Tips* section of the Salesforce online help).

- **Translate solutions into multiple languages**

  Enable multilingual solutions so that users can create and translate solutions into multiple languages. Then, when your customers log into your Self-Service portal, they can view solutions in their preferred language. Customers can also choose to view solution search results in a specific language or all supported languages via a language drop-down list.

- **Create solutions to answer the most commonly asked questions**

  Since your customers will be using the Self-Service portal to find answers to common issues, it is a good idea to create a solution for each of your organization's FAQs.

  Any standard user of Salesforce has access to create solutions, although you may decide to assign this initial task to a select group of Customer Support representatives.

- **Finalize the solution review process**

  To maintain a high level of quality for your solutions, it is a good idea to standardize the review process for solutions. We recommend that you use three Solution Status values as follows:

  Recommended Solution Status Values

Status	Meaning
Draft	Default status for all new solutions.
Review Level 1	Solution Managers review all Draft solutions to: – Check for duplicates – Make the solution complete – 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	Senior Solution Managers review all Review Level 1 solutions to determine whether the solution should be published to the Self-Service portal. Status should then be changed to Review Level 2 and the `Visible in Self-Service Portal` checkbox selected.

  We also recommend that you decide which Solution Managers will be responsible for publishing solutions.

- **Categorize approved solutions**

  Use solution categories to group similar solutions together, enabling customers to browse through and search relevant categories for solutions that answer their questions.

  We recommend that you 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.

  If your organization uses multilingual solutions, we recommend that you use the Translation Workbench to translate categories into multiple languages. Translated solutions inherit the categories of their master solution.

  See the Salesforce online help for more information about defining your categories, categorizing individual solutions, and translating categories.

- **Track the history of solution fields**

  Select which standard and custom fields to track on the Solution History related list to see when and how users modified any solution.

- **Publish approved solutions**

  Only published solutions will be available on the Self-Service portal. You will need to identify the solutions you want to make available, edit the solutions individually, and select the `Visible in Self-Service Portal` checkbox to publish each solution.

- **Identify the "Top 5 Solutions" for the Self-Service Portal**

In the Self-Service portal, you can choose to list up to five solutions of your choice on the Home page that users see when they first log in.

Identify Self-Service Users

The customers who will be using the Self-Service portal are referred to as "Self-Service users." You should decide whether you want to offer Self-Service access to all customers or only to a select group of customers, e.g., customers with Gold Support.

- **Identify the customers to whom you will grant Self-Service access**

  You can create a report in Salesforce or use other customer lists to identify which customers should have access to the Self-Service portal.

  For each company, you can also identify one or more Self-Service super users who will be able to access all cases submitted by anyone in their company.

- **Create a contact record for each Self-Service user**

  Make sure that each contact contains a valid email address.

Determine the Information Your Users Need

- **Identify the fields Self-Service users will see when *viewing* cases**

  You can choose to allow Self-Service users to see any standard or custom case fields when they are **viewing** their open and closed cases online. You may want to hide any internal or customer-sensitive fields.

- **Identify the fields Self-Service users will see when *logging* cases**

  You can choose to allow Self-Service users to see any standard or custom case fields when they are **submitting** cases online. Decide which fields should be required when Self-Service users submit a case online.

Customize Case Fields

If you plan to enable suggested solutions, create field values that can be used on cases when Self-Service users close their own cases in the Self-Service portal.

- **Create values for the Case Status field**

  Customize values for the `Case Status` field so that a specific status can be automatically assigned to cases that are closed by Self-Service users.

- **Create values for the Case Reason field**

  Customize values for the `Case Reason` field so that Self-Service users can choose the specific reasons as to why they closed their own cases.

For details on customizing field values, see "Modifying Picklists" in the Salesforce online help.

Customize Email Templates

Email templates help you standardize communication with your Self-Service users. Salesforce provides three basic email templates, which you can customize:

Initial introduction email for Self-Service users

This email is sent to new users and contains their Self-Service username and password. Salesforce adds the following text at the end of each email sent with this template:

- `Username: name@company.com`
- `Password: xxxxxx`

Reset password email for Self-Service users

This email is sent to Self-Service users when you reset their Self-Service passwords.

Auto-response email with suggested solutions

This email is automatically sent to help users solve their own cases submitted via email, Web-to-Case, or from the Self-Service portal. In the auto-response email template, include the suggested solutions mail merge field, {!Case_Suggested_Solutions}, which provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries. For details, see "Setting Up Auto-Response Rules" in the Salesforce online help.

Customize and Distribute the Self-Service Tip Sheet

If you want to provide your customers with information about how they can answer their own inquiries using your Self-Service portal:

- **Download and edit the tip sheet provided by Salesforce**

  Download the Using the Self-Service Portal tip sheet and edit it to match your Self-Service portal's branding and features, such as suggested solutions and the ability to attach files to submitted cases.

- **Distribute the tip sheet to customers**

  Email or post the tip sheet to your website so that customers who want to learn how to answer their own inquiries can do so.

SELF-SERVICE SETUP

Follow the steps below to set up and configure your organization's Self-Service portal.

- Self-Service Jump Start

  Express setup allows you to enable your portal with a few clicks.

- Create a Self-Service Web Portal

  Determine the location of the Self-Service portal and generate the login page.

- Define Self-Service Settings

  Customize your organization's Self-Service Settings.

- Customize the Style Sheet

  Customize the style sheet to control the branding of your organization's Self-Service pages.

- Customize Fonts and Colors

  Customize the fonts and colors of your organization's Self-Service pages.

- Customize Headers and Footers

  Standardize your page headers or footers and keep the branding of your Self-Service pages consistent.

- Customize Content of Self-Service Pages

  Enable the Self-Service portal pages and customize the content.

- Enable Self-Service Users

  Enable your customers as Self-Service users and provide them with a Self-Service username and password.

Note: You must have the "Manage Self-Service Portal" permission to set up the Self-Service portal. In addition, you need the "Customize Application" permission to modify the Self-Service page layouts.

If you have Enterprise, Unlimited, or Performance Edition, you can create a complete single copy of your organization in a separate environment to test your customizations to make sure they function the way you expect before implementing them in your Salesforce organization. For details, see "Creating a Salesforce Sandbox" in the online help.

Self-Service Jump Start

Jump Start is the fastest way to get your Self-Service portal running. With the click of a few buttons, you can create your custom pages and accept a few default settings.

Administrators and users with the "Manage Self-Service Portal" permission can launch the Self-Service Jump Start from the Cases or Solutions home page or follow the steps below.

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

Self-Service Jump Start	
Step	**Action**
2	Click the **Jump Start** button.
3	Review the jump start process and click **Continue**.
4	Choose a color theme.
5	Edit the default settings as needed and click **Save**.
6	Test your Self-Service portal by: **1.** Clicking **Generate** to retrieve a test username and password. **2.** Clicking **Access Self-Service Portal** to preview pages. **3.** Optionally, click **Invite** to allow other users to preview pages.
7	Enable your Self-Service portal by inserting the link provided to an appropriate place on your website.
8	Click **Done** when finished.

Note: Follow the tasks below to further customize your Self-Service portal.

Create a Self-Service Web Portal

The Self-Service portal can be hosted on your corporate website or you can have Salesforce host the portal for you with your company's logo and branding. If you host the portal yourself, you will want to use at least two HTML frames. The outer frame can contain your corporate logo, website navigation, or other branding content, and the inner frame should be reserved for the Self-Service content from Salesforce.

Creating the Self-Service Web Portal	
Step	**Action**
1	Determine the location of the Self-Service login page. This is the page to which Self-Service users will go to log in to the Self-Service portal. You can place this page anywhere on your corporate website, or you can simply insert a link to the page hosted by Salesforce.
2	If hosting the portal yourself, create the HTML frames for your organization's Self-Service login page. Put your company's content in the outer frame.
3	Generate the HTML code for the Self-Service login page. **1.** From Setup, enter *Self-Service Portal* in the Quick Find box, then select **Settings**. **2.** Click **Generate Login HTML**. **3.** On your website, create a link to the URL provided to have Salesforce host your Self-Service portal for you. Alternatively, to host the portal yourself, copy the HTML code provided into the inner frame of your login page. **4.** Click **Finished**.

Define Self-Service Settings

Self-Service settings allow you to customize the Self-Service portal for your organization.

Defining Self-Service Settings

Step	Action
1	From Setup, enter *Self-Service Portal* in the Quick Find box, then select **Settings**.
2	Click **Self-Service Setup**.
3	On the Self-Service feature selection page, customize the Self-Service settings. See Self-Service Settings on page 8 for descriptions of each setting.
4	**Save** your settings.

Self-Service Settings

Setting	Description
Login Enabled	When checkbox is checked, allows users to log into the Self-Service portal.
Edit Self-Service Users	Displays the **Enable Self-Service** button on contact detail pages. For contacts in which Self-Service is already enabled, the **View Self-Service** button displays.
Logout URL	The URL of the web page that will be displayed when users log out of the Self-Service portal, for example, "http;//www.acme.com." If a logout URL is not specified, the **Logout** button will not display to users.
Default Case Origin	The default origin assigned to all cases submitted via the Self-Service portal. Available values are taken from your organization's Case Origin picklist. You can assign different default origins for cases submitted via Self-Service, Email-to-Case, and Web-to-Case.
New Cases Visible in Self-Service Portal	Automatically selects the **Visible in Self-Service Portal** checkbox for all new cases, including cases created via Email-to-Case and Web-to-Case. Regardless of this default, users creating new cases can manually set the **Visible in Self-Service Portal** checkbox.
Enable Solution Browsing	Enables solution categories in the Self-Service portal so that customers can browse solutions by category. If multilingual solutions is enabled, you can translate solution categories via the Translation Workbench. For more information, see the Salesforce online help.

Self-Service Settings	
Setting	**Description**
Top-Level Category for Customer Self-Service	The top-level category accessible by customers in the Self-Service portal. Customers can view all published solutions in this category and its subcategories. If you do not specify this, customers can view all published solutions in all categories.
Case Record Type	The record type to assign to any case submitted via the Self-Service portal.
"From" Email Address	The email address from which all new user and new password emails will be sent, for example, "support@acme.com."
"From" Email Name	The name that will be associated with the "From" Email Address, for example, "Acme Customer Support."
New User Template	The email template used to send a username and initial password to all newly enabled Self-Service users. Salesforce automatically selects a sample template for you. You can create your own template or modify the sample.
New Password Template	The email template used to send a new password to existing Self-Service users when you reset their passwords. Salesforce automatically selects a sample template for you. You can create your own template or modify the sample.
Enable Notification on New Case Comment	When selected, indicates that the Send Customer Notification option on a case comment is displayed. Even if this checkbox is not selected, note that the Send Customer Notification option still displays on cases if you have enabled email notification to contacts who are not members of your Self-Service portal.
New Comment Template	The email template used to send a notification to Self-Service users when a public comment is added to one of their cases. Salesforce automatically selects a sample template for you. You can create your own template or modify the sample.
Enable Case Auto-Response Rules for Self-Service Cases	Indicates if cases submitted through your Self-Service portal will trigger your auto-response rules.
Case Creation Template	The email template to use when cases submitted through your Self-Service portal do not match any auto-response rules.
Maximum Page Width	The maximum pixel width of the Self-Service pages from Salesforce. If hosting the portal yourself, this is the width of the inner HTML frame on your Self-Service login page.
Minimum Page Height	The minimum pixel height of the Self-Service pages from Salesforce.

Self-Service Settings

Setting	Description
`Style Sheet URL`	The complete, publicly accessible URL of your organization's Self-Service style sheet, for example, "http://www.acme.com/styles/selfservice.css." See Customize the Style Sheet on page 10 for information on creating a customized style sheet.
`Color Theme`	Use one of the Salesforce predefined color themes if you do not have a style sheet URL to use. Click the **View** link to see the available color themes. See Customize Fonts and Colors on page 11 for more information on customizing color themes.
`Case Single Term`	Term used on the Self-Service portal instead of the term "case" (singular form).
`Case Plural Term`	Term used on the Self-Service portal instead of the term "cases" (plural form).
`Solution Single Term`	Term used on the Self-Service portal instead of the term "solution" (singular form).
`Solution Plural Term`	Term used on the Self-Service portal instead of the term "solutions" (plural form).

Customize the Style Sheet

You can customize the Self-Service style sheet to control the branding of your organization's Self-Service pages. Alternatively, you can select one of several predefined color themes.

Customizing the Style Sheet

Step	Action
1	Select a predefined color theme, or download a style sheet to customize. **1.** From Setup, enter *`Self-Service Portal`* in the `Quick Find` box, then select **Settings**. **2.** Click the **Self-Service Setup** button. **3.** Click the **View Color Theme Options** link next to the `Color Theme` field. **4.** Find a set of fonts and colors you like and click **Download This Color Theme**. To use a predefined color theme without customizing it, simply click **Select This Color Theme**. **5.** Save the color theme you downloaded and give it to your webmaster if it needs more customization. The downloaded color theme is a CSS style sheet that your webmaster can edit.
2	Modify the style sheet as needed.
3	Save the style sheet in a publicly accessible location on your corporate website.
4	Enter the URL of the style sheet in the Self-Service settings; see Define Self-Service Settings on page 8.

Customizing the Style Sheet

Step	Action
5	Preview each Self-Service page with the customized style sheet. **1.** From Setup, enter *Self-Service Portal* in the Quick Find box, then select **Settings**. **2.** In the Self-Service Portal Pages related list, select the **Preview** links to view a sample of each Self-Service page with the style sheet.

Customize Fonts and Colors

You can customize the fonts and colors for all your Self-Service pages by selecting a predefined "color theme" and customizing it manually or with a point-and-click editor.

Customizing the fonts and colors

Step	Action
1	From Setup, enter *Fonts and Colors* in the Quick Find box, then select **Fonts and Colors**.
2	Select the color theme you want to customize.
3	Choose a portal page to customize.
4	Click **Edit** next to the visual element you want to customize. Some elements are visible only on the selected portal page, and some are shared across multiple portal pages. Changes you make to shared elements affect all pages.
5	If using the point-and-click editor, select a basic or advanced attribute to customize, and click **Edit**. If you do not see the advanced attributes, select the Show advanced attributes box. See the Salesforce online help for descriptions of the page attributes you can customize.
6	In the popup window, change the attribute as needed.
7	Depending on the attribute you edit, click either **OK** or **Save**.
8	Click **Save** to save all changes to the visual element and its attributes. Customizations are not visible to your Self-Service users until you set the color theme as active.
9	Repeat these steps to customize all visual elements and their attributes as necessary.
10	Click **Fonts and Colors** from the setup menu.
11	Click **Set Active Theme**.
12	Select the theme to activate for your portal, live and in real-time. Your organization can only have one active theme.
13	Click **Save**.

Customize Headers and Footers

You can customize the headers and footers for all your Self-Service pages.

Customizing the Headers

Step	Action
1	In the Portal Page Section related list, click **Edit** on the Page Header line.
2	Check `Show Header` to display the header on your portal pages.
3	Check `Show Header Separator` to display a line separating the header from the body of your page.
4	If desired, enter a message to display in the header. Use the HTML formatting toolbar to format your message or insert an image from your Documents library.
5	Click **Save**.

Customizing the Footers

Step	Action
1	In the Portal Page Section related list, click **Edit** on the Page Footer line.
2	Check `Show Footer` to display the footer on your portal pages.
3	Check `Show Footer Separator` to display a line separating the footer from the body of your page.
4	If desired, enter a message to display in the footer. Use the HTML formatting toolbar to format your message or insert an image from your Documents library.
5	Click **Save**.

Customize Content of Self-Service Pages

You can enable the following Self-Service pages and customize their content.

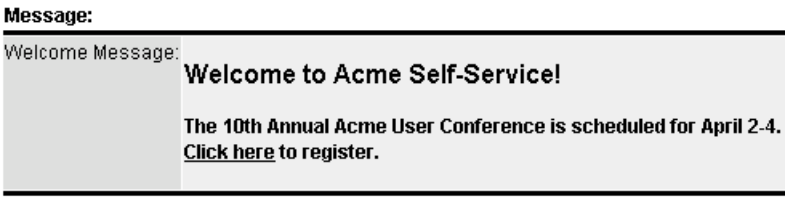
Types of Self-Service Pages

Page	Description
Login Page	Prompts user for user name and password
Home Page	First page users see after they log in
Solutions Page	Allows users to search your solutions
Log a Case	Allows users to log a case for your Customer Support team
View Cases	Allows users to see their open and closed cases, and, optionally to add attachments and comments to their cases
Suggested Solutions	Allows users to view solutions that may help them solve their own cases from the View Cases page and the Log a Case page.

Customizing the Login Page

The Login page is the first page that Self-Service users see; it prompts them to log in.

Customizing the Login Page

Step	Action
1	In the Self-Service Portal Pages related list, click **Edit** on the Login Page line.
2	Check `Show Message` to display a message on this page.
3	If you enabled the message, enter the text of the message. Use the HTML formatting toolbar to control the font, size, and color of the message or insert an image from your Documents library. Your message can have up to 32,000 characters, including HTML formatting. For example: 
4	Click **Save**.
5	On the Self-Service Settings page, click the **Preview** link to view how the page will look. If you have customized the Self-Service style sheet or color theme, the preview shows the page using your customized styles.

Customize the Home Page

The Home page is the first page that Self-Service users see after they log in.

Customizing the Home Page

Step	Action
1	In the Self-Service Portal Pages related list, click **Edit** on the Home Page line.
2	Select the features that you want to enable for the Home page. For example: • The Top Solutions List shows the titles of up to five solutions of your choice on the Home page. Self-Service users will be able to select the solution titles to view the full solution details. • The Open Cases List shows the open cases of the Self-Service user who is logged in. • The message option allows you to display a formatted message at the top of the Home page.
3	If you enabled the message, enter the text of the message. Use the HTML formatting toolbar to control the font, size, and color of the message or insert an image from your Documents library. Your message can have up to 32,000 characters, including HTML formatting. For example:

Customizing the Home Page

Step	Action
	Message: Welcome Message: **Welcome to Acme Self-Service!** **The 10th Annual Acme User Conference is scheduled for April 2-4. Click here to register.** Insert merge fields to replace text with your data dynamically.
4	Click **Save**.
5	If you enabled the Top Solutions list, click **Add** on the Self-Service Settings page to search for and select solutions to display in the Top Solutions list.
6	On the Self-Service Settings page, click the **Preview** link to view how the page will look. If you have customized the Self-Service style sheet or color theme, the preview shows the page using your customized styles.

Enable the Solutions Page

You can enable the Self-Service Solutions Page from the Self-Service Portal Pages related list. The Solutions page allows users to see published solutions and any files attached to those solutions.

Enabling the Solutions Page

Step	Action
1	Click **Edit** on the Solutions Page line.
2	Select the `Show Solution Page` checkbox.
3	Check `Show Message` to display a message on this page.
4	Enter your message. Use the HTML formatting toolbar to control the font, size, and color of the message or insert an image from your Documents library. Insert merge fields to replace text with your data dynamically.
5	Click **Save**.
6	To see how your Solutions page will look, click **Preview** on the Solutions Page line. If you have customized the Self-Service style sheet or color theme, the preview shows your custom styles.

Note: Users can browse for and find solutions by category on the Solutions page if you have enabled solution category browsing in the Self-Service setup. See the Salesforce online help for information on defining solution categories and categorizing solutions.

Customize the Log a Case Page

You can enable and customize the Log a Case Page from the Self-Service Portal Pages related list. The Log a Case page allows users to submit new cases to your customer support team. New cases submitted from this page will be automatically created in Salesforce and assigned to the support representative or queue defined by your case assignment rules.

Customizing the Log a Case Page

Step	Action
1	To allow users to submit cases from your Self-Service portal, click **Edit** on the Log a Case Page line.
2	Select the `Show Log a Case Page` checkbox.
3	Check `Show Message` to display a message on this page.
4	Enter your message. Use the HTML formatting toolbar to control the font, size, and color of the message or insert an image from your Documents library. Insert merge fields to replace text with your data dynamically.
5	Click **Save**.
6	To change the fields that display on the page, click the **Page Layout** link.
7	Click **Edit** to modify the layout.
8	To arrange fields, custom links, and related lists on the layout, select one or more items and drag them to the desired location. • Use CTRL+click to select multiple items individually. • Use SHIFT+click to select multiple items as a group.
9	To set which fields are required and read only, select one or more fields and click **Edit Properties**.
10	To organize the page using sections, click **Edit** next to an existing page section, or click **Create New Section** to create a new page section.
11	Click **Save** to finish.
12	To see how your Log a Case page will look, click **Preview** on the Log a Case Page line. If you have customized the Self-Service style sheet or color theme, the preview shows your custom styles.

Customize the View Cases Page

You can enable and customize the View Cases page from the Self-Service Portal Pages related list. The View Cases page allows users to view their open and closed cases, to see related solutions, and (optionally) to add comments and attachments to their cases. Consider which fields you want to expose to Self-Service users online. You may choose to hide internal or customer-sensitive fields.

Customizing the View Cases Page

Step	Action
1	Click **Edit** on the View Cases Page line.
2	Select the `Show View Cases Page` box to allow users to view their open and closed cases.
3	Select `Add Comments to Cases` to allow users to add comments to their cases. When a user adds a comment, an email is automatically sent to the case owner.
4	Select `Add Attachments to Cases` to allow users to upload files to their cases.
5	Select `Show Message` to display a message.

Customizing the View Cases Page

Step	Action
6	Enter your message. Use the HTML formatting toolbar to control the font, size, and color of the message or insert an image from your Documents library. Insert merge fields to replace text with your data dynamically.
7	Click **Save**.
8	To change the fields that display on the page, click the **Page Layout** link.
9	Click **Edit** to modify the layout.
10	To arrange fields, custom links, and related lists on the layout, select one or more items and drag them to the desired location. • Use CTRL+click to select multiple items individually. • Use SHIFT+click to select multiple items as a group.
11	To set which fields are required and read only, select one or more fields and click **Edit Properties**.
12	To organize the page using sections, click **Edit** next to an existing page section, or click **Create New Section** to create a new page section.
13	Click **Save** to finish.
14	To see how your View Cases page will look, click **Preview** on the View Cases line. If you have customized the Self-Service style sheet or color theme, the preview shows your custom styles.

Note: To hide specific cases from users in the Self-Service portal, you can deselect the `Visible in Self-Service Portal` checkbox on the case.

Customize the Suggested Solutions Page

You can enable and customize the Suggested Solutions page from the Self-Service Portal Pages related list. The Suggested Solutions page displays up to ten relevant solutions that may help users solve a particular case. When submitting a case or viewing cases in the Self-Service portal, users can view suggested solutions and close their cases themselves. The suggested solutions are not simply found via a keyword search. Rather, suggested solutions are found using a formula that automatically scores the relevancy of each solution to the particular case via word frequency, word proximity, case similarity, and related solutions. If multilingual solutions is enabled, suggested solutions returns relevant solutions in multiple languages if they share common words with the case.

Customizing the Suggested Solutions Page

Step	Action
1	Click **Edit** on the Suggested Solutions Page line.
2	Select `Show Suggested Solutions Page` to enable the page in the Self-Service portal.
3	Select a `Self-Closed Case Status` to show in the `Status` field for cases closed by Self-Service users. You must select at least one "Closed" value for this field.
4	Choose the maximum number of suggested solutions to display to users at one time. You can show a maximum of ten.

Customizing the Suggested Solutions Page	
Step	**Action**
5	Select which `Self-Closed Case Reasons` from which Self-Service users can choose when they self-close their cases.
6	Check `Show Message` to display a message on this page.
7	If you enabled the message, enter your message in the text box, using the formatting toolbar to format the size, color, or font.
8	Optionally, insert any merge fields for data that you want to replace dynamically.
9	Click **Save**.

Enable Self-Service Users

You must enable Self-Service access for all Self-Service users. To enable Self-Service for one of your Salesforce contacts:

Enabling Self-Service Users	
Step	**Action**
1	Within Salesforce, display the contact record.
2	Click the **Enable Self-Service** button. For contacts in which Self-Service is already enabled, the **View Self-Service** button displays.
3	Verify the contact's information, and enter any missing information. Note that the contact's Self-Service username, by default, will be the same as his or her email address.
4	Select the `Super User` checkbox to enable the contact as a Self-Service super user who can view case information, add comments, and upload attachments for all cases submitted by anyone in his or her company.
5	Select the `Generate new password and notify user immediately` box to have a Self-Service username and password emailed to the contact.
6	Click **Save**.

To enable Self-Service access for many contacts at once:

Enabling Multiple Self-Service Users	
Step	**Action**
1	From Setup, enter *`Users`* in the `Quick Find` box, then select **Users**.
2	Click **Enable New User(s)**.
3	Enter search criteria to find the contacts you want enabled.
4	Click **Search**.

Enabling Multiple Self-Service Users	
Step	**Action**
5	Select the contacts to enable from the list of search matches.
6	Click **Next**.
7	Make any changes to the users' login information.
8	Click **Save**.

Note: Click **Reset Password(s)** to automatically email your newly enabled users a new password.

SELF-SERVICE REPORTING

Organizations that have a Self-Service portal can gather data about portal use. The Self-Service reporting features include:

Self-Service Usage Report

The Self-Service Usage Report gives you information about which Self-Service features your customers are using.

Self-Service User Report

This report gives you access to information about your Self-Service users including their Self-Service Active status, Last Self-Service Login, and their associated Account. With this report, you can make a master list of your active Self-Service users and see who uses the portal regularly.

Helpful Solutions Report

The Helpful Solutions report displays statistics from Self-Service portals that display solutions. On each solution page, customers can indicate whether that solution is helpful. You can use this report when choosing the top five solutions for your Self-Service Home page and to verify that customers are able to find the solutions they need.

Self-Service Fields for Custom Account and Contact Reports

In any account or contact report, an organization with an enabled Self-Service portal can use the Self-Service Active and Last Self-Service Login fields when generating a custom report.

Closed by Self-Service User field for Support Reports

In any support report, an organization that has enabled both the Self-Service portal and suggested solutions can use the Closed by Self-Service User field to report on how many cases have been closed by users via suggested solutions on the Self-Service portal.

Case History and Solution History Reports

The Case History and Solution History reports show the history of changes to standard and custom fields where field history tracking is enabled.

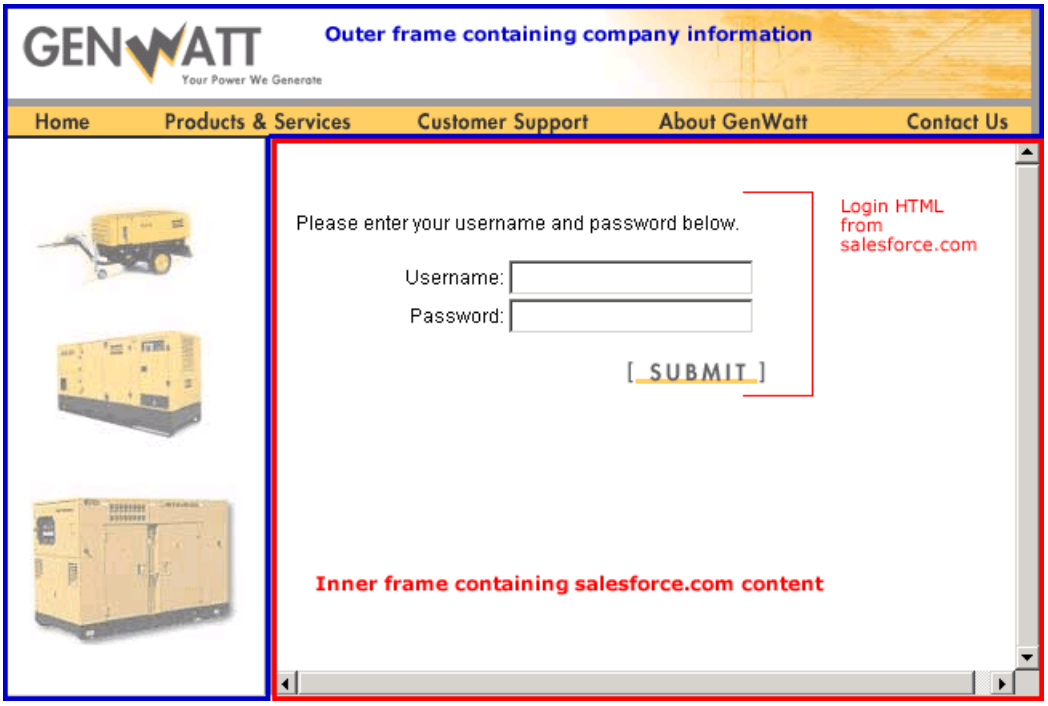
EXAMPLE SELF-SERVICE IMPLEMENTATION

The example implementation includes the following customized Self-Service pages:

- Login Page
- Home Page
- View Cases Page
- Log a Case Page
- Solution Detail Page

Login Page

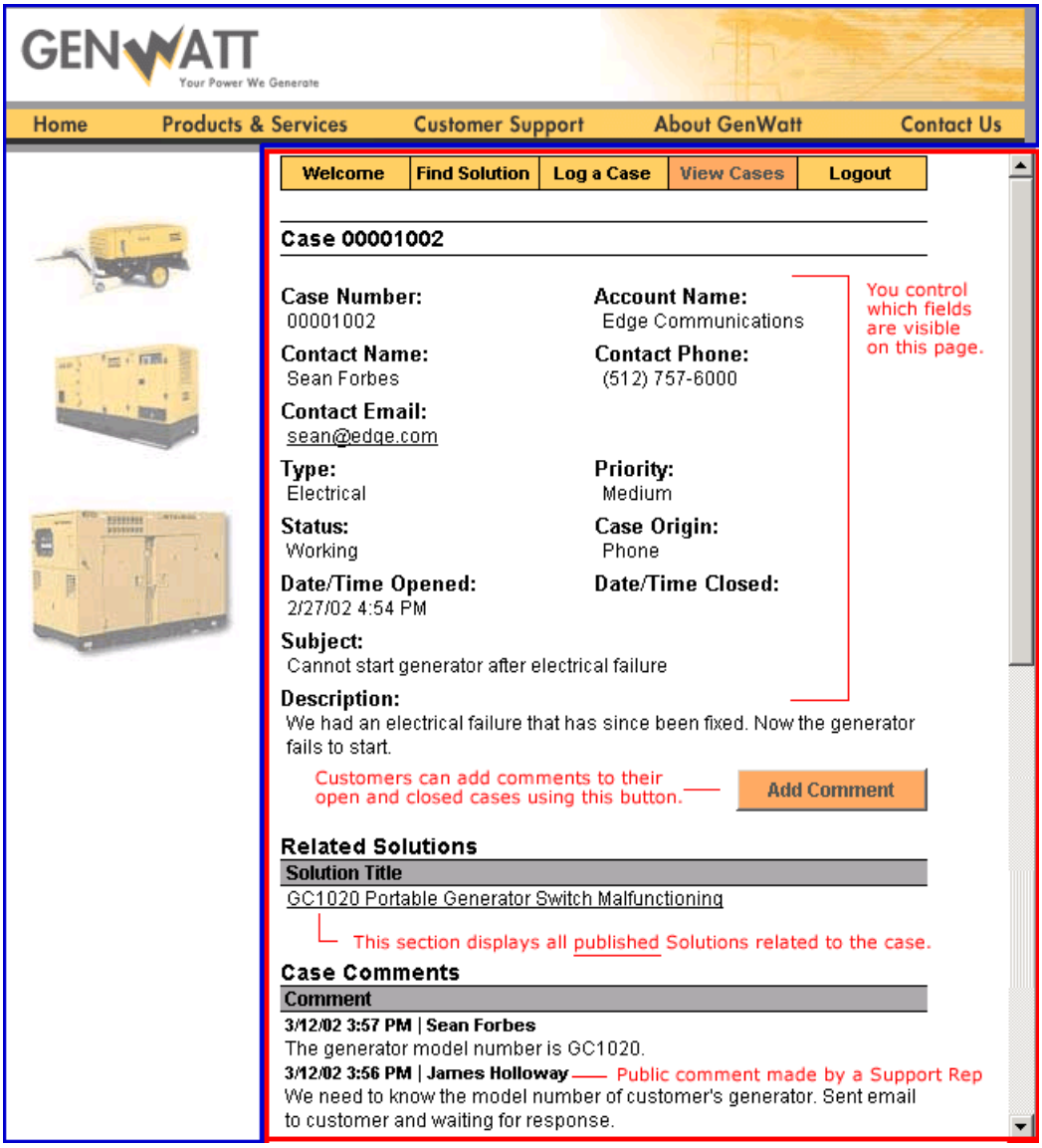
This example shows a portal using HTML frames, with the outer frame hosted by the company. You can also have Salesforce host your portal without frames.



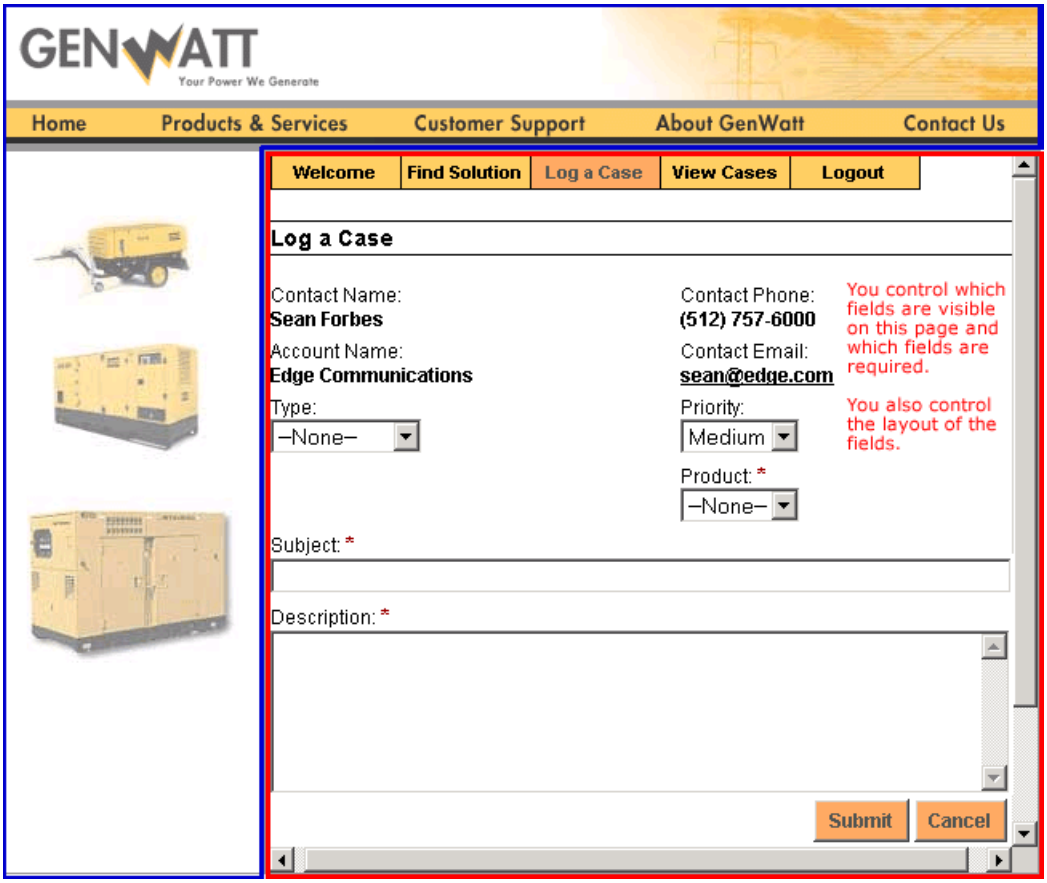
Home Page

GENWATT
Your Power We Generate
Home
Products & Services
Customer Support
About GenWatt
Contact Us
Welcome
Find Solution
Log a Case
View Cases
Logout
Logged in: Sean Forbes from Edge Communications
Menu choices controlled by which pages you enable
Welcome to GenWatt Self-Service!
Customized Welcome Message
Top Solutions
You control whether this list is displayed
Solution Title
1 GenWatt Installation Services
2 Selecting the Right Generator for Your Needs
3 GC1020 Portable Generator Switch Malfunctioning
4 GenWatt SLA Commitments
5 GC3000 Series Propane Generator Ignition
My Open Cases
You control whether this list is displayed
Case Number
Issue
Created Date
00001001 Shutting down of generator 2/27/02
00001002 Cannot start generator after electrical failure 2/27/02

View Cases Page



Log a Case Page



Solution Detail Page