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THE CUSTOMER SUCCESS PLATFORM

Web-to-Case Overview

Best Practices

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Web-to-Case

Basics

Gather customer support requests directly from your company's website and automatically generate up to 5,000 new cases a day with Web-to-Case. This can help your organization respond to customers faster, improving your support team's productivity.

- Web To Case is a means by which you can post a simple, unauthenticated web page that allows your customers to submit cases directly to your Salesforce.com instance. This means that you can post a public case submission page on your own website with your own branding and styling.
- Web To Case works by generating a snippet of HTML for you. This HTML is an HTML form that you can put on any page. When your customer presses Submit, the information on this form is posted directly to a Salesforce.com server, which handles the information, converts it to a case, and redirects the customer's browser back to a page of your choosing.

Web-to-Case

Basics

- When your customer posts a case via Web To Case, a few fields are generally required, most importantly the name and the email address.
- These values will be stored in the newly created Case in the Web Name and Web Email fields. If that email address happens to be associated with a Contact in your system, then Web To Case will automatically associate that case with the contact who has that email address, and with the account associated to that contact.
- If that email address is not found, or Web To Case discovers more than one contact with that email address, then Web To Case will not know which contact to associate to the case. In that instance, it will leave the Contact and Account fields on the case blank and allow you to fill them (which you can generally find using those Web Name and Web Email fields).

Web-to-Case

What is it useful for?

Let's say that you're doing a lot of support by email. Emails are an unstructured medium, so even if you're automating the process with Email to Case, someone generally still has to look at the cases to classify them -- it's not easy to perform workflow on plain text.

Web To Case allows your customers to submit the information directly into the individual fields on your case, so you can perform a great deal of automation, like workflow, assignment, and auto-response rules, immediately. That can save you a lot of man hours.

- *Web To Case is a very quick way to put up a web form to accept cases. You can generally have a quick-and-simple page up in minutes, and because it's standard HTML, it's easy to embed into an existing page.*

Web-to-Case

Prerequisites

- Before you set up Web-to-Case:
- Create custom case fields, if needed.
- Create a default email template for the automated notification that will be sent to your customers when they submit a case.
- Create case queues if you wish to assign incoming cases to queues as well as to individual users.
- Customize Support settings to select the default owner of cases that don't meet the criteria in your assignment rule.
- Create an active case assignment rule to determine how web-generated cases are assigned to users or put into queues. If you do not set an active assignment rule, all web-generated cases are assigned to the default owner you specify in the Support Settings.

Web-to-Case

Web-to-Case Notes and Limitations

- Keep these considerations in mind as you decide how to set up Web-to-Case.
- Web To Case is limited to receiving 5000 cases per day. This is to keep things like spambots from beating up your org (and our servers).
- Web To Case does not perform any spam filtering. To avoid receiving spam in your Web-to-Case forms you may use the following solutions:
 - Creating validation rules.
 - Utilizing CAPTCHA.
 - Using Web services. to filter out cases that appear to be spam
- Whenever possible, Web-generated cases are automatically linked to the relevant contact and account based on the customer's email address.
- Salesforce runs field validation rules before creating records submitted via Web-to-Case and only creates records that have valid values. All universally required fields must have a value before a record can be created via Web-to-Case.

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Web-to-Case Notes and Limitations (continued)

- The format for date and currency fields captured online is taken from your organization's default settings - Default Locale and Currency Locale.
- Salesforce doesn't support rich text area (RTA) fields on Web-to-Case forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the case is created.
- If your organization exceeds its daily Web-to-Case limit, the default case owner (specified in your Support Settings page) will receive an email containing the additional case information.
- Web To Case cannot handle attachments. This is an aspect of the simplicity of its setup, and of the simple transactional nature of HTTP. Web To Case is a simple form with a single post that you can embed anywhere.
 - There is an idea posted on our Idea exchange and is being reviewed by our product team.
 - [Allow Web-to-Case to support Case Attachments](#)

Web-toCase

Workarounds

- Web To Case is solely a tool for the initial submission of cases. If your customers need to be able to track their cases, or add information to them after initial submission, then you'll want to look into the Self Service Portal or the Customer Community-- those are authenticated products that allow your customers to file cases, but also to follow up on them, browse the knowledge base, and share information in a collaborative community based upon Chatter.
- If you need to take more than 5000 cases per day, or you want to be able to take attachments, you can now do so using Force.com Sites.
- Here's a quick start on how to create Custom Web to Case Forms using VisualForce:
 - http://wiki.developerforce.com/index.php/Creating_Custom_Web-To-Case_Forms_Using_Visualforce_and_Sites

Web-to-Case

Setup Resources and FAQs

- [Set Up Web-to-Case](#)
- [What is the maximum number of web cases we can capture?](#)
- [Who owns new web-generated cases?](#)
- [How do I specify which information to capture?](#)
- [Can I capture cases from multiple web pages?](#)
- [How can our webmaster test the Web-to-Case page?](#)
- [What status and origin are assigned to Web-generated cases?](#)
- [How can I be sure that cases won't be lost?](#)
- [How do I avoid Web-to-Case spam?](#)

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Thank you