



# SETTING UP CUSTOMER SUPPORT

## Summary

Use support features to better manage your support team and improve customer satisfaction.

### Tips for Support Reps

After setting up support features, read "Tips & Hints for Support Reps" to help optimize your Support workflow.

## What Are the Setup Steps?

From the object management settings for cases in Setup:

1. Set which case fields are tracked on the Case History related list.
2. Add the `PARENT_CASE` field and Related Cases related list to case page layouts.

Set up these support features from Setup.

1. Create email templates.

Use email templates to notify:

- Customers that their case was created manually
- Customers that their online case has been received
- Customers that a new comment has been added to their case
- Users that cases were assigned to them
- Users that cases were escalated
- Users about solutions that may help them solve their case

2. Create queues for cases.
3. Set up case contact roles so multiple contacts can be associated with a case.
4. Customize the support settings. You must customize support settings before setting up assignment rules, escalation rules, Web-to-Case, Email-to-Case, and On-Demand Email-to-Case. See [Support Settings](#) for details.
5. Set case assignment rules.
6. Create case escalation rules.
7. Set up Web-to-Case and Email-to-Case or On-Demand Email-to-Case.
8. Set up auto-response rules that determine the email templates to send to customers based on any attribute of the case they submit.
9. Set up public solutions so that customers can find them (From Setup, enter `Public Solutions` in the `Quick Find` box, then select **Public Solutions**).
10. Set up a Self-Service portal or Customer Portal so that your customers can resolve their inquiries without contacting a customer support representative.



**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.

11. Set up the Salesforce console or Console tab to include cases so that your support team can work with customer inquiries more efficiently. For more information, see the Salesforce online help.

## Assignment and Escalation Rules

### Queues

- You can create your queues based on service level, product expertise, or other criteria.
- When creating a queue, complete the `Queue Email` with an address to use for all notification email messages, for example, when a case is automatically assigned to a queue.
- For every new queue, a queue list view is automatically added to the Cases tab, allowing you to see all cases in the queue.
- Support representatives can accept cases from any queue.

### Web-to-Case & Email-to-Case

- Web-to-Case generates an HTML form to post on your company's website to capture your customers' inquiries.
- Email-to-Case lets you capture customers' email as cases.
- Your active assignment rule determines how these cases are distributed as they are received.
- Auto-response rules determine which email to send to customers when they submit a case.

### Case Assignment Rules

- Case assignment rules automatically route cases to users or queues.
- Notifying users or queues when cases are assigned to them works best for organizations with a small caseload. With a larger caseload, customer support representatives can receive email notifications only when cases are escalated.

### Case Escalation Rules

- With case escalation rules, you can automatically escalate cases with certain criteria if they are still open after a specific period of time.
- You can choose to notify a user and/or reassign the case, or just mark the case as escalated.
- Salesforce periodically checks for open cases that match an escalation rule entry.

### How Rules Work

- You can have one active assignment rule and one active escalation rule at a time. Each rule is an umbrella for multiple rule entries.
- Cases are processed through the assignment or escalation rule entries in order. When a case matches the rule entry criteria, that entry is applied.
- The last entry should catch cases that do not meet other criteria.

## Support Settings

Support settings act as your control panel for automated support features. You can access these settings from Setup by entering *Support Settings* in the *Quick Find* box, then selecting **Support Settings**.

- For `Default Case Owner`, choose a queue or user as the owner of cases that fail to meet the criteria in your assignment rule entries. If you want the person notified when a case is assigned to him or her, select the `Notify Default Case Owner` checkbox.
- For `Record Type Setting`, select how record types should be assigned when applying assignment rules.
- For `Automated Case User`, select a user to list for all automated actions in the Case History related list.
- Select a `Case Creation Template` to automatically notify customers that their case was created. This is for manually-created cases, not Web-to-Case, Email-to-Case, or On-Demand Email-to-Case, so use the contact merge fields for personalization. If the suggested solutions feature is enabled, use the `{!Case_Suggested_Solutions}` merge field to include solutions that may help the user resolve a case.
- Select a `Case Assigned Template` to notify a user or queue that a case was assigned to them by another user.
- Select a `Case Close Template` to automatically notify customers that their case has been closed.
- Select `Enable Case Comment Notification to Contacts` to specify whether contacts who are not Self-Service portal users can receive an email notification when a case comment has been modified or added to a case. If you choose this option, click the `Case Comment Template` lookup field and select the email template for these email notifications.

- Select `Notify Case Owner of New Case Comments` to notify case owners when users and customers add a public or private comment to their case.
- Select `Early Triggers Enabled` to ensure that escalation rules and their actions are triggered before the time specified.
- Select `Enable Suggested Solutions` to show the **View Suggested Solutions** button on case detail pages, which may help users solve cases.

## Knowledge Settings

Give your website visitors, clients, partners, and service agents the ultimate support tool. Create and manage a knowledge base with your company information, and securely share it when and where it's needed.

Your Salesforce Knowledge base is built from knowledge articles, which are documents of information. Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions, like how much storage your product supports.

Experienced service agents and internal writers write the articles. The articles are then published and can be used internally or externally in a range of channels. You can publish articles in customer and partner communities and public websites or share articles in social posts and emails. Control where and what information is published or shared based on the article page layouts, user profiles, actions, and other settings.

To set up or edit your knowledge base, from Setup, enter *Knowledge Settings* in the Quick Find box, select **Knowledge Settings**, then click **Edit**.

See the [Salesforce Knowledge Guide](#) for detailed information.