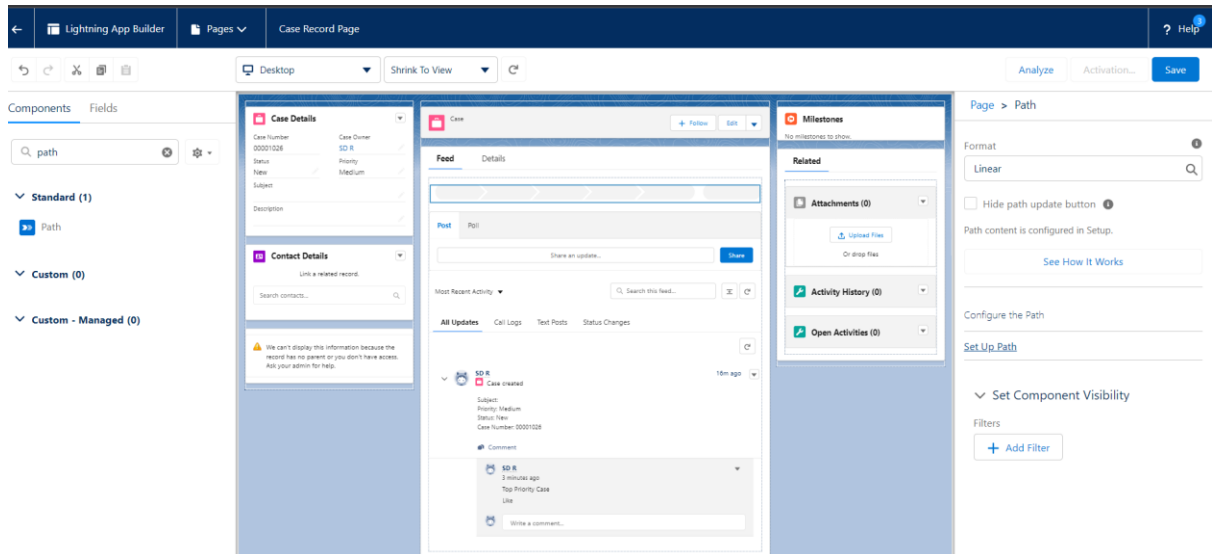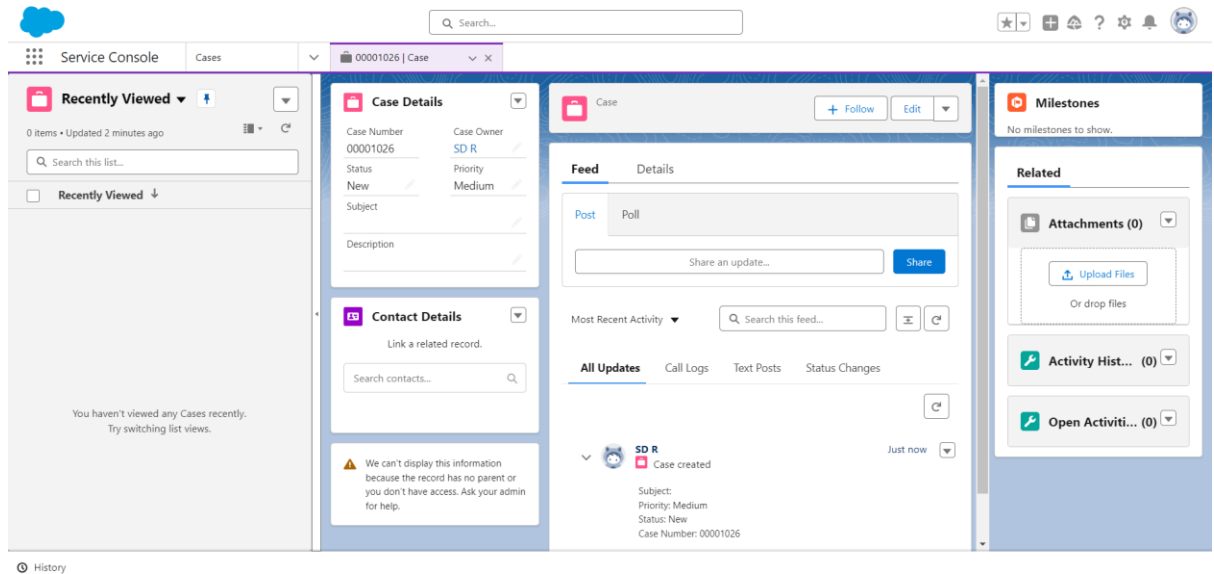# SFC-MOD6-ASSIGNMENT-1

Tasks To Be Performed:

1. Create a case and add a path to the case object using the Salesforce setup. Also, add the fields such as account, case number, contact email, etc to the case object. Finally, activate the path.

salesforce

Name and Record Type — Fields and Text — Finish

Step 2: Select Fields and Provide Guidance for Each Step in the Path

For each step in the process:

- Select fields that you want to appear for your users.
- Provide guidance for success, like tips, links to Chatter groups or files, best practices, and policy reminders.

| New | Working | Escalated | Closed |

Fields	Guidance for Success
Account Name	B I U S ...
Case Number	
Contact Email	
Contact Mobile	
Created By	Number of characters remaining: 1000

+ Add/Update Fields

Back   Next

← | Lightning App Builder | Pages ∨ | Case Record Page   ? Help

↶ ↷ ✂ ▤ 🗑   Desktop ▾   Shrink To View ▾   ⟳   Analyze   Activation...   Save

Components | Fields

🔍 path ✕ ⚙️

∨ Standard (1)

  ▶ Path

∨ Custom (0)

∨ Custom - Managed (0)

Case Details
Case Number Case Owner
00001026   SD R
Status   Priority
New   Medium
Subject
Description

Contact Details
Link a related record.
Search contacts...

⚠ We can't display this information because the record has no parent or you don't have access. Ask your admin for help.

Case
+ Follow Edit ▾

> | New | Working | Escalated | Closed |
Status: New   ✓ Mark Status as Complete

Feed Details

Post Poll
Share an update...   Share

Most Recent Activity ▾   🔍 Search this feed...

All Updates Call Logs Text Posts Status Changes

SD R
Case created   16m ago
Subject:
Priority: Medium
Status: New
Case Number: 00001026

Comment

SD R
24 minutes ago
Top Priority Case
Like

Write a comment...

Milestones
No milestones to show.

Related

📎 Attachments (0)
⬆ Upload Files
Or drop files

Activity History (0)

Open Activities (0)

Get more on the AppExchange

Page > Path

Format   ⓘ
Linear   🔍

☐ Hide path update button ⓘ

Path content is configured in Setup.

See How It Works

Configure the Path

Set Up Path

Case Path (previewed)

∨ Set Component Visibility

Filters

+ Add Filter

2. Enable web to case option in Salesforce and set the case origin as web. Generate a form using the web to case html generator and create a case using the form.

SETUP
Web-to-Case

Web-to-Case Settings

Help for this Page

Use a simple web form or a self-service customer community to make it easy for customers to submit cases directly to your customer support group.
For detailed information on setting up Web-to-Case or Self-Service Community templates, see the Salesforce help.

Basic Settings

Enable Web-to-Case	☑ ℹ
Require reCAPTCHA Verification	☐ ℹ
Default Case Origin	Web ▾ ℹ

Auto-Response Email Settings

Default Response Template	Support: Case Created (We 🔍 ℹ
Hide Record Information	☐ ℹ
Email Signature	[ ] ℹ

Save   Cancel

SETUP
Web-to-Case HTML Generator

Capturing Case Information from Your Website

Help for this Page

Using pre-existing pages on your company's website, you can capture contact and case information from users and automatically create new cases in salesforce.com, enabling you to respond in real-time to customer requests.

Capture Cases

Copy and paste the sample HTML below and send it to your webmaster.

```
<!-- ---------------------------------------------------------------- -->
<label for="name">Contact Name</label><input  id="name" maxlength="80" name="name" size="20"
type="text" /><br>

<label for="email">Email</label><input  id="email" maxlength="80" name="email" size="20" type="text"
/><br>

<label for="phone">Phone</label><input  id="phone" maxlength="40" name="phone" size="20" type="text"
/><br>

<label for="subject">Subject</label><input  id="subject" maxlength="80" name="subject" size="20"
type="text" /><br>

<label for="description">Description</label><textarea name="description"></textarea><br>

<input type="submit" name="submit">

</form>
```

Finished

Contact Name [Reshma]
Email [sayadreshma7867@gmail.c]
Phone [9987654321]
Subject [Salesforce]
Description [Prior my case]
Submit

3. Create a case assignment rule along with rule entry where case origin equals web and sort order is 1.

4. Create escalation rule and its related rule entries where case origin is web with sort order as 1. Also create the escalation action where a time criterion is 30 min and specify the user

Rule Entry Edit
Case Escalation Rule

Edit this rule entries' details or add a new action to take when this entries' details and criteria is met.

Enter the rule entry

[Edit] [Cancel]

Rule Name	Case Escalation Rule
Order	1
Rule Criteria	Case: Case Origin EQUALS Web
Business Hours Settings	Use business hours specified on the case
How escalation times are set	When case is created

[Edit] [Cancel]

Escalation Actions   [New]

Escalation Actions Help

Action	Escalate At	Assign To	Email	Notify	Template
Edit	Del	30 Minutes	Apurup Sales Manager	☐		