

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
 - Sales app home page> cases tab

ini Edit 00001026

* = Required Information

Case Owner: Veena G

Case Number: 00001026

Contact Name: Veena Giri

Account Name: Search Accounts...

Type: Mechanical

Case Reason: Performance

* Status: New

Priority: Medium

Contact Phone:

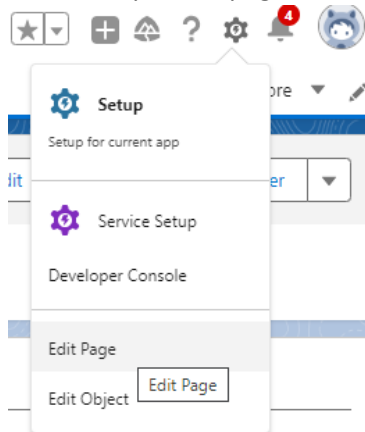
Contact Email:

* Case Origin: Email

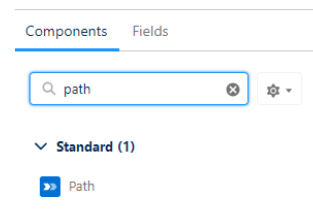
☐ Send notification email to contact

Cancel Save & New Save

Path- Setup > edit page



Search path in quick find box-



Set the path-

Step 1: Name Your Path and Choose an Object

The object and record type you choose determine the business process for your users.

Path Name: Case Path

API Reference Name: Case_Path

Object: Case

Record Type: --Master--

Picklist: Status

Activate your path-

Step 3: Activate Your Path and Enable Celebrations

Activate Your Path

When you activate your path, key fields and guidance appear in Kanban for the same object, record type, and picklist. Not ready to make this path available? Save it, and activate it later.

☒

Enable Celebrations

When users reach a specific step in the path, help them celebrate their success with on-screen confetti. Confetti appears in paths and kanban views.

☐

Path save and setup-

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 > quick find box > web to case>

-
- Save it

S

Module 6 Assignment – Support Process and Cases

- Now Web to case HTML generator-
Setup> quick find box> web to case Html
Generate html like below
Copy it and save it in notepad as html

 **Web-to-Case HTML Generator**

Capturing Case Information from Your Website

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 requests.

Capture Cases

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

```
<!-- ----- -->
<!-- NOTE: Please add the following <META> element to your page <HEAD>. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-- ----- -->

<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">

<!-- ----- -->
<!-- NOTE: Please add the following <FORM> element to your page. -->
<!-- ----- -->

<form action="https://webto.salesforce.com/servlet/servlet.WebToCase?encoding=UTF-8" method="POST">
<input type="hidden" name="orgid" value="00D2t0000000000000">
<input type="hidden" name="setURL" value="http://"/>

<!-- ----- -->
<!-- NOTE: These fields are optional debugging elements. Please uncomment -->
<!-- ----- -->
```

Finished

Security Che x | Verify your ic x | Start Course x | Mod-6-Assig x | Home | Sales

← → ↺ ⓘ File | C:/Users/Admin/OneDrive/Desktop/Salesforce.html

Contact Name

Veena

Email



veena1===

Phone

Subject






Description

Submit

 **All Open Cases** 

6 items • Sorted by Case Number • Filtered by All cases - Closed • Updated a few seconds ago

Search this list...

	Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner...
1	00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC5060	New	Low	7/4/2023, 7:52 AM	VGiri
2	00001016	Edna Frank	Maintenance guidelines for generator unclear	New	Low	7/4/2023, 7:52 AM	VGiri
3	00001024	Lauren Boyle	Design issue with mechanical rotor	New	Low	7/4/2023, 7:52 AM	VGiri
4	00001026	Veena Giri		New	Medium	10/5/2023, 1:06 PM	VGiri
5	00001027			New	Medium	10/5/2023, 1:24 PM	VGiri
6	00001028			New		10/5/2023, 3:36 PM	VGiri

New case created via web

3. Create a case assignment rule along with rule entry where case origin equals web and sort order is 1.
 - Quick find > Case assignment> New> create > save

Module 6 Assignment – Support Process and Cases

Q case as

Feature Settings

Service

Case Assignment Rules

Didn't find what you're looking for?
Try using Global Search.

Case Assignment Rules

Automatically assign cases to users or queues based on criteria you define. You can create multiple rules, but only one rule can be active at a time.

Click a rule name to add or edit rule entries.

Action	Rule Name	Active	Created By	Created On
Rename Del	Standard	✓	Veena G	7/4/2023

New Case Assignment Rule

After you create your rule, select it from the assignment rules list and add rule entries.

[Save](#) [Cancel](#)

Rule Name

☐ Active [i](#)

[Save](#) [Cancel](#)

Click on the new rule created> click new

Case Assignment Rule

Case assignment 1

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail

Rule Name Case assignment 1

Active ☐

Created By [Veena G](#), 10/5/2023, 3:50 PM

Modified By [Veena G](#), 10/5/2023, 3:50 PM

[Edit](#)

Rule Entries

[New](#)

No rule entries specified.

We recommend you create multiple rule entries under this rule. It is typically not necessary to create more than one rule.

Case Assignment Rules

Rule Entry Edit

Case assignment 1

Enter the rule entry [Save](#) [Save & New](#) [Cancel](#)

Step 1: Set the order in which this rule entry will be processed

Sort Order [i](#)

Step 2: Select the criteria for this rule entry

Run this rule if the [criteria are met](#) :

Field	Operator	Value
Case: Case Origin	equals	Web
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

[Add Filter Logic...](#)

Step 3: Select the user or queue to assign the case to

User [i](#) [i](#)

☐ Do Not Reassign Owner

Email Template [i](#)

Save it

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.

- Create new case with case origin web as below

Case Information

Case Owner: Veena G

Case Number: [Empty]

Contact Name: Veena Giri

Account Name: Case assignment

Type: --None--

Case Reason: --None--

Case Currency: INR - Indian Rupees

Status: Working

Priority: Medium

Case Origin: Web

☒ Assign using active assignment rule

☐ Send notification email to contact

Buttons: Cancel, Save & New, Save

Escalation rule-

Setup> quick find box>

Setup > Escalation Rules

Case Escalation Rules

Automatically determine when cases should escalate and what actions to take. After you create a rule, select it from the rules list and add rule entries.

Action	Rule Name	Active	Created By	Created On
Rename Del	Standard	✓	Veena G	7/4/2023

Buttons: New, Save, Cancel

New Case Escalation Rule

After you create your rule, select it from the escalation rules list and add rule entries.

Rule Name: Case Escalation rule

☐ Active

Buttons: Save, Cancel

Module 6 Assignment – Support Process and Cases

Rule Entry Edit

Case Escalation rule

Enter the rule entry

Save Save & New Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order

Step 2: Select the criteria for this rule entry

Run this rule if the :

Field	Operator	Value
Case: Case Origin	equals	Web
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

Add Filter Logic...

Step 3: Specify the business hours criteria for this escalation rule

☐ Ignore business hours

☒ Use business hours specified on the case

☐ Set business hours

Click on the new created rule> **Escalation Actions> New**

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

Duration- 30min

Escalation Action Edit

Save Cancel

Escalation Action Edit

Specify the time criteria for this rule

Age Over 0 minutes

Choose one or more of the following actions:

Auto-reassign cases

User

Notification Template

Notify users

Notify This User

Notification Template

Notify Case Owner ☐


You can enter up to five (5) email addresses to be notified. Please put each address on its own line.

Additional Emails

Save Cancel

Save it

Results-

 **Escalation Rules**

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.

Help for this Page

Enter the rule entry Edit Cancel

Rule Name	<u>Case Escalation rule</u>
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 Hours and 0 Minutes	Veena G	<input type="checkbox"/>		