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

Path- Setup > edit page
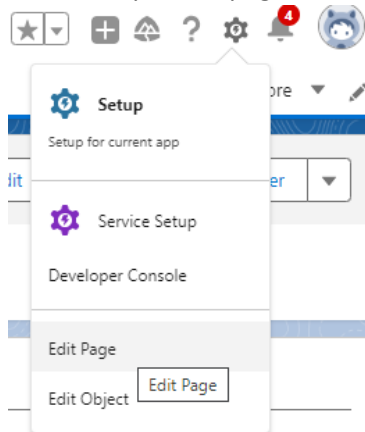
Search path in quick find box-
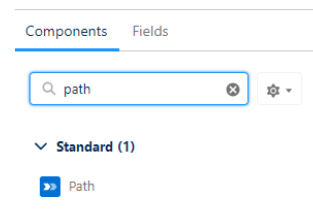
Set the path-

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

- 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

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

New Case Assignment Rule

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

	Save Cancel	
Rule Name	Case assignment 1	
☐ Active ⓘ		
	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   Edit

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.

SETUP
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 ⓘ 1

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 🔍	AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		AND
--None-- ▼	--None-- ▼		

Add Filter Logic...

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

User ▼	Veena G 🔍	Email Template	🔍
	☐ Do Not Reassign Owner		

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

Escalation rule-

Setup> quick find box>

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 [i]   1

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	ANI
--None-- ▾	--None-- ▾		ANI
--None-- ▾	--None-- ▾		ANI
--None-- ▾	--None-- ▾		ANI
--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   Help

Save   Cancel

Escalation Action Edit | = Requi

Specify the time criteria for this rule
Age Over [i]   30   [0 minutes ▾]

Choose one or more of the following actions:

Auto-reassign cases
[User ▾] [Veetik Jr Sales Representa] 🔍   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-

Rule Entry Edit
Case Escalation rule

Help for this Page ❓

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 Hours and 0 Minutes	Veena G	☐		