



Infowise Ultimate Forms Practice Development - Dynamic Service Request

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Advisory

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Case Study; Support request submission on the Company's website - Dynamic form

Executive summary

The goal of most organizations is to improve the customer support experience by capturing the correct data that will allow the right agent to solve the customer's issue as fast as possible. Salesforce's best practice for creating a support request (aka Case) on a company website is Web2Case - a simple snippet of HTML with no option to control the logic and experience.

Infowise ultimate form lets you create a dynamic form for submitting support requests. The dynamic form assists in guiding the user as per their inputs by showing only the fields required for categorizing, triaging, and navigating to solve their support request by the best agent/engineer.

Industries - All

Use Cases Example

- Dynamic Case submitting - Based on customer inputs, the form questions are changed to collect the right support data for a faster resolving time.
- Dynamic form (custom object) - collect customer data for operational processes such as - Social worker to estimating current individual state, collecting customer CV data, etc.

Customer - Tech

Use case - A one-page questionnaire that guides the user through opening a Support Request (Case Object).

As a customer, I can submit support requests on the i.e. partner portal using different forms per the selected request type.

- Problem
- I have a question
- Report a bug

Each type will assign a dedicated record type/support process and SLA. Different business inputs are needed for each support request (i.e., the serial number is required on the 'Problem' request type and for 'I have a question, no).

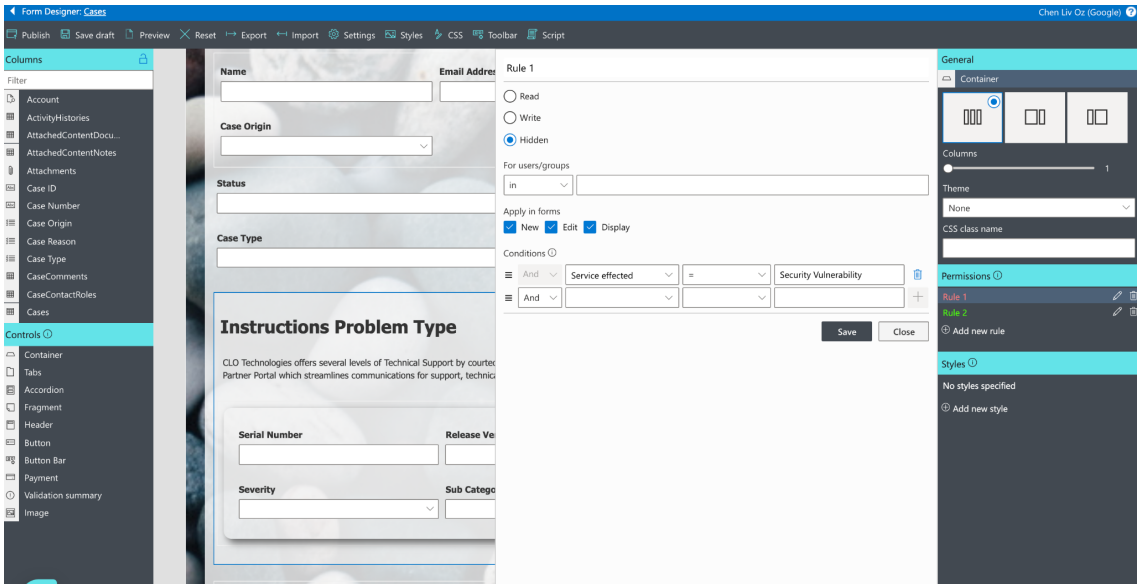
Case Study Implementation

- Connect Salesforce Organization to Infowise App
- Generate a form by Form Designer under sandbox
 - Select relevant fields
 - Define rules -
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 - Hide fields if needed
 - Auto-fill fields based on input data
- Test on preview mode
- Define access control
- Set your form on a test web page (landing page, 3rd party website)
 - With captcha
- Test it on the development environment
- Export form
- Create a new organization for production
 - Connect org
- Import Form
- Set your form on a web page

Benefits

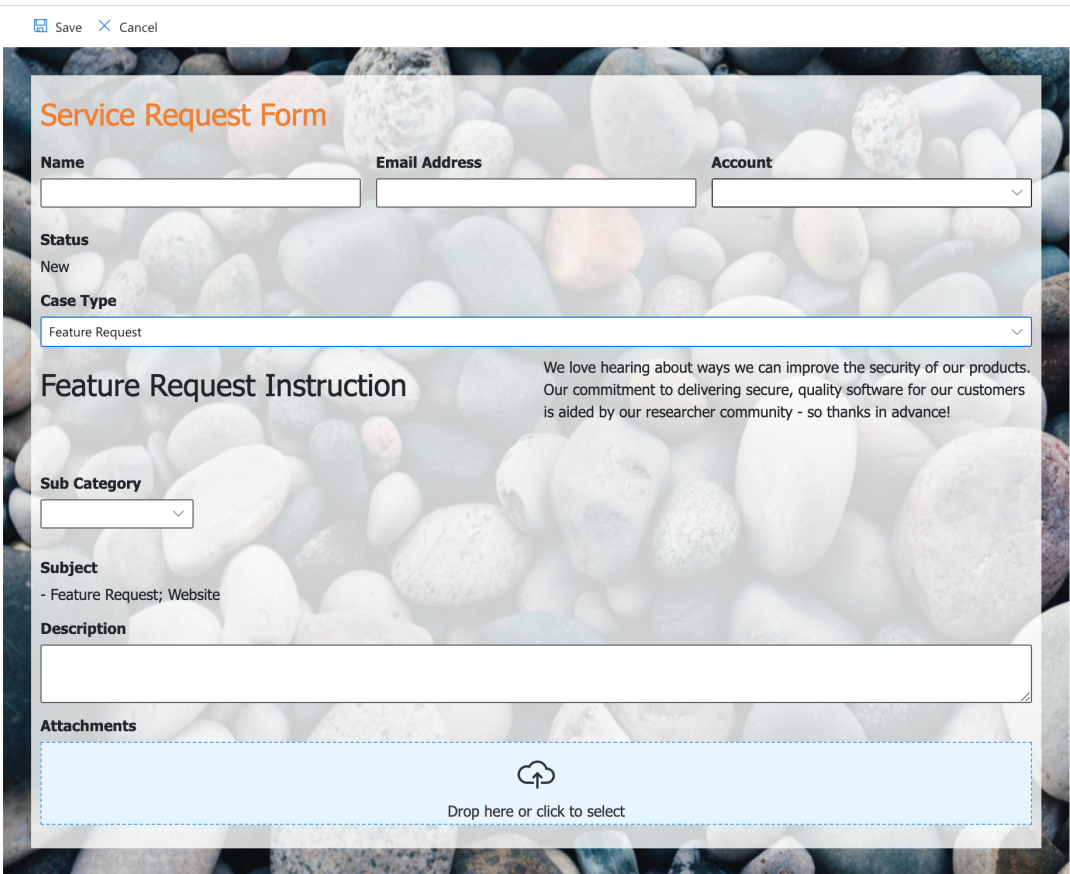
- Not one line code had been written
- Plug and play tool
- Less in half a day with testing, and it is up and running
 - Can be a temp or all-time solution
- No Escalation rules

Results





A dynamic embedded form on a Partner Portal with hidden parameters and no code needed.

On Form Designer - Rules



Final Result

 Save
  Cancel

Service Request Form

Name

Email Address

Account

Status
 New

Case Type

Instructions Problem Type

CLO Technologies offers several levels of Technical Support by courteous and responsive experts. All customers receive access to the CLO Technologies User and Partner Portal which streamlines communications for support, technical and marketing resources, and managing support tickets.

Serial Number

Release Version

Service effected


Severity

Sub Category

Subject
 - Problem; Website

Description

Attachments



The form on Website with 'Problem' Selection