

My wife always says I forget everything that she tells me to do, and she is probably correct. To help with this, I created a page on my website that will allow her to make a new case in my Salesforce Org. In this example, every time the web form is completed, it creates a new case in my Salesforce org, and Salesforce calls this Web-to-Case.

Web-to-Case: is a web form that is placed on your company website that allows a customer to create a new case in your Salesforce Org without having to contact you.

How to Setup Salesforce for Web-to-Case

The first thing we need to do is enable Web-to-Case in Salesforce, and this is done on the Web-to-Case setup page.

- **Setup**
- Type **Web-to-Case** in the quick search box
- Click on **Web-to-Case**

The screenshot shows the 'Web-to-Case' setup page in Salesforce. At the top, there's a 'SETUP' header with a gear icon and the title 'Web-to-Case'. Below this is the 'Web-to-Case Settings' section. A helpful tip states: '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.' The settings are divided into two main sections: 'Basic Settings' and 'Auto-Response Email Settings'. In 'Basic Settings', Step 1 is 'Enable Web-to-Case' (checked), Step 2 is 'Require reCAPTCHA Verification' (unchecked), and Step 3 is 'Default Case Origin' (set to 'Web'). In 'Auto-Response Email Settings', Step 4 is 'Default Response Template' (set to 'Support: Case Created') and Step 5 is 'Email Signature' (set to 'Your Web Support Team at jderflinger.com'). At the bottom right are 'Save' and 'Cancel' buttons.

Web-to-Case Setup menu

Step 1 - Enable Web-to-Case: Click the *checkbox* to Enable Web-to-Case

Step 2 - Require reCAPTCHA: Check if reCAPTCHA Verification is required: in this example, I left it *unchecked*.

Step 3 - Default Case Origin - Default Case Origin: I left it as the default of **Web**

Step 4 - Default Response: For this example, I left the *default - Support: Case Created*

Step 5 - Email Signature - What do you want the email signature to say? In this example, I just said it was from the **Support Team**.

Now we have set up everything we need to Enable Web-to-Case. Click **Save** and move on to the next step.

Web-to-Case HTML Generator Setup

Salesforce will automatically generate the HTML code you need to create the web form for Web-to-Case. Once this code is generated, all you need to do is get it to your website Administrator, and they will be able to embed it on your website, and you can start collecting information from your customers. So let's go to the Web-to-Case HTML Generator page and get started.

- **Setup**
- Type **Web-to-Case** in the quick search
- Click on **Web-to-Case HTML Generator**

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 s

Capture Cases

Select the fields to include:

NOTE: Would you like to add custom fields that you do not see listed under Available Fields?

Available Fields		Selected
Company		Contact Name
Status		Email
Case Reason		Phone
Priority		Subject
Engineering Req Number		Type
SLA Violation		Description
Product		
Potential Liability		

Step 1

☒ Visible in Self-Service Portal

Enter the URL that the user will be returned to:

Step 2

URL

Step 3

☒ Include reCAPTCHA in HTML [i](#)

reCAPTCHA API Key Pair

Enable server fallback ☒ [i](#)

Web-to-Cas HTML Generator Setup Page

Step 1 - Field Selection: Move the Fields you want to capture to the Selected column. Notice here I have Contact Name, Email, Phone, Subject, Type, and Description.

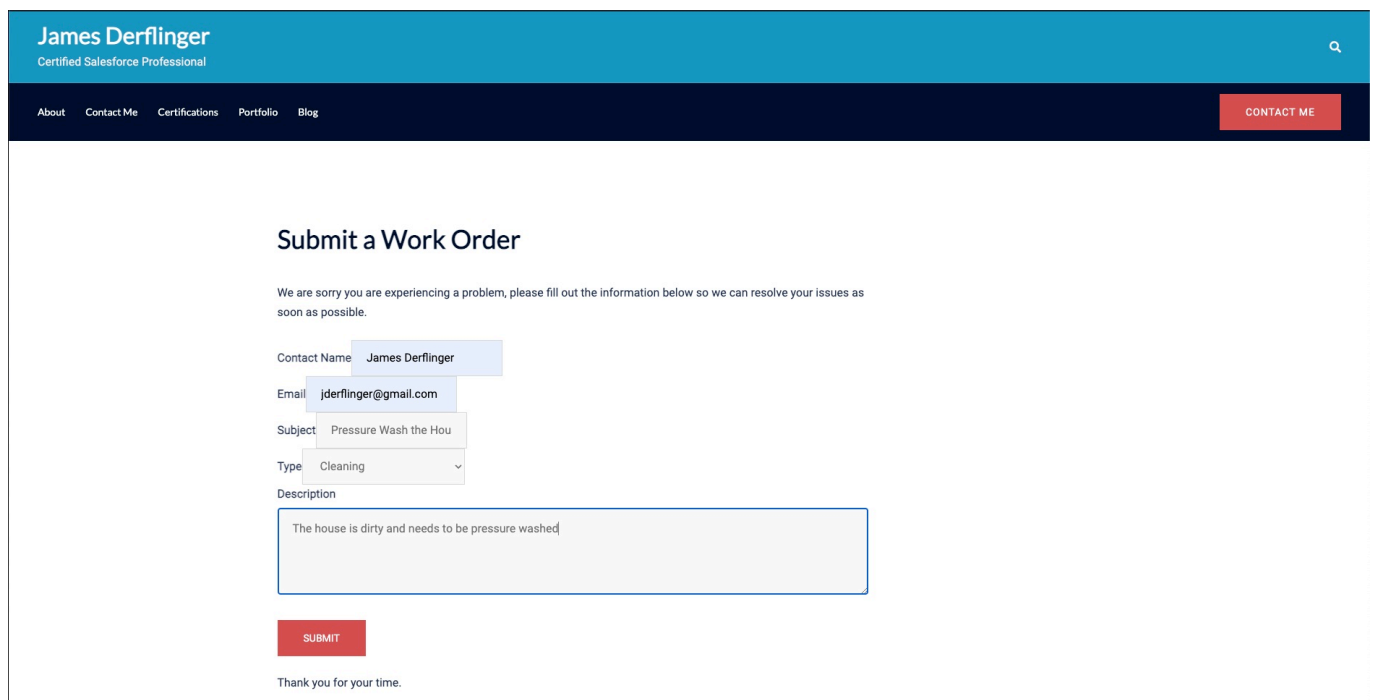
Step 2 - Return URL: enter a page that you want the customer to be redirected to after they complete the form. I went to a thank you page.

Step 3 - reCAPTCHA: Check if you want to include a reCAPTCHA: I will **uncheck** this since it's not on in the setup.

Master the Art of Active Listening with These 5 Tips

That is all you have to do on this page. Click **Generate** to have Salesforce Generate your HTML Code

Once you have that block of HTML code, send it to your website Administrator, and they will be able to embed it on your company's website. Once it is embedded, it will look something like this:



The screenshot shows a web page for James Derflinger, a Certified Salesforce Professional. The page has a blue header with the name and title, and a dark blue navigation bar with links for About, Contact Me, Certifications, Portfolio, and Blog. A red 'CONTACT ME' button is in the top right. The main content area is white and features a 'Submit a Work Order' form. The form includes a message: 'We are sorry you are experiencing a problem, please fill out the information below so we can resolve your issues as soon as possible.' The form fields are: Contact Name (James Derflinger), Email (jderflinger@gmail.com), Subject (Pressure Wash the Hou), Type (Cleaning), and Description (The house is dirty and needs to be pressure washed). A red 'SUBMIT' button is at the bottom of the form. Below the button, it says 'Thank you for your time.'

Web-to-Case HTML code embedded in my website.

As you can see, I am already filling out information about a project I need to do; pressure wash the house. Once all the information is filled in, just hit Submit, and the user is redirected to the thank you page we linked earlier in HTML Generator Page.

As you can see below, a new case has been created, and you can also see my wife has already started submitting things for me to do.

Master the Art of Active Listening with These 5 Tips

Cases			
All Open Cases ▾			
4 items • Sorted by Case Number • Updated a minute ago			
New (1)	In Progress (3)	Escalated (0)	Closed (0)
<div>00001035 ▾</div> <div>James Derflinger</div> <div><u>Pressure Wash the House</u></div> <div>New</div>	<div>00001026 ▾</div> <div>James Derflinger</div> <div><u>Hole in Master bedroom Wall</u></div> <div>In Progress</div>		
	<div>00001027 ▾</div> <div>Lori Derflinger</div> <div><u>Work Orders</u></div> <div>In Progress</div>		
	<div>00001028 ▾</div> <div>Lori Derflinger</div> <div><u>Bathroom ceiling</u></div> <div>In Progress</div>		

New Case Created

I hope this has helped you learn more about Web-to-Case, and as you can see, I have a lot of things to start checking off of my to-do list, so I should get started on that.