

Webforms treatment

Overview

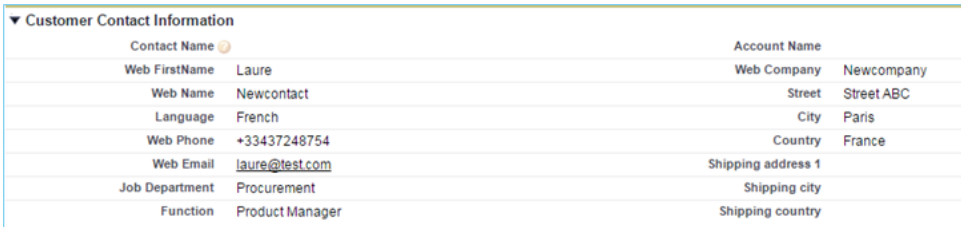
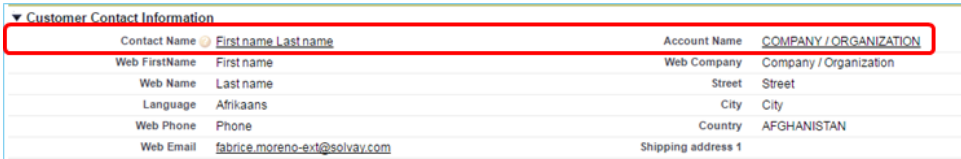
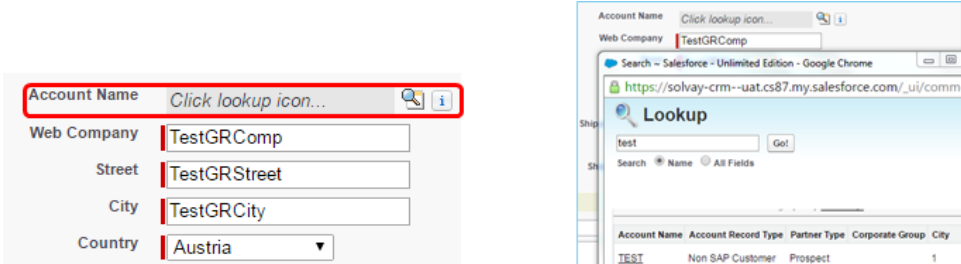
In this section, you will find information about:

- how to treat a webform

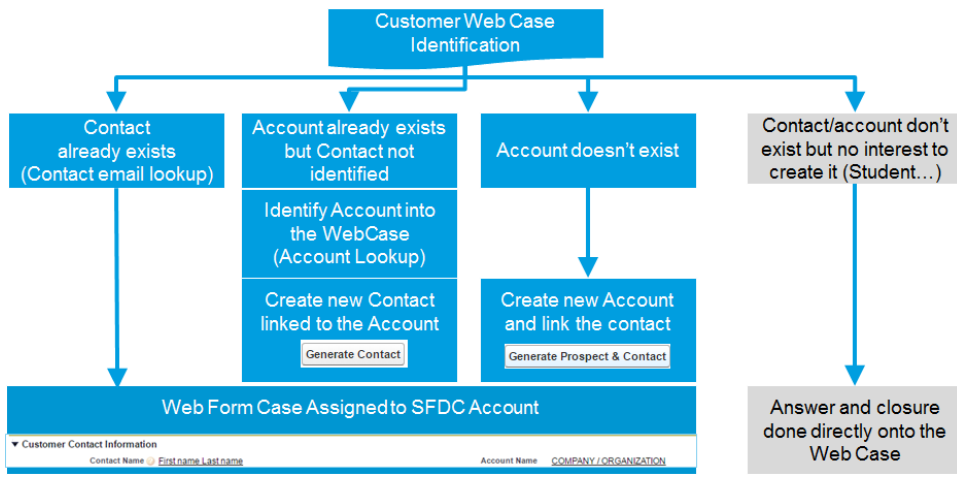
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Step-By-Step

Account/Contact Management	
<p>In the Webform, the prospect/customer information are received</p>	
<p>If the contact email already exists in Salesforce database, the Contact & Account will be linked automatically</p>	
<p>If the contact does not exist, maybe the Account exists. It is mandatory to try to find the Account before creating a new Prospect (in Edit Mode)</p>	

Below is a summary of the different options to manage the Prospect /Customer information



- A direct answer can be provided to the customer directly from the Web form using the mail standard editor and Solvay templates:

Case Conversion

The **Web Form Case** can be converted onto an other **CRM case**: Sample Request, Customer Request or Opportunity

In that case the **WebForm** will be **closed** with the **Status** "**Closed - Accepted**" and a **new Case** will be **initiated** with Pre-filled information. The **New Case** will follow the **standard** corresponding **CRM process**

The **Conversion process** has to be **done by user** having the authorization to create a new case

Before converting the case, the **New Case type** should be checked or amended if necessary

▼ Qualification Section

Customer Type	Prospective customer / distributor
Type	Customer Request
Subtype	Documentation

Type: Customer Request ▼
 Customer Request
 Sample Request
 Opportunity

Case Conversion - Customer Request

To **convert** the Case, click on "**Conversion Process**", a **new Case** (type depending on the "Type" in the Webform Case), will be **initiated**

Case Detail [Edit] [Close Case] [Assign To Me] [Generate Contact] [Generate Prospect & Contact] [Conversion Process]

Case Number	00012357	GBU	Soda Ash & Derivatives
Date/Time Opened	8/11/2016 21:00	Case Owner	SodaAsh Webform [Change]
Time Spent			
Date/Time Closed			
Application Code	COAPP00027		
Market Segmentation	FISHERIES - AQUACULTURE		

▼ Qualification Section

Customer Type	Prospective customer / distributor	Status	New
Type	Customer Request	Priority	
Subtype	Documentation	Case Origin	Website

A **confirmation** windows will appear before initiating the new case

Are you sure you want to convert this case into a Customer Request? This case will be closed.

A new **Customer Request Case** is initiated. Some **information** are **pre-filled** based on what was registered onto the Webform.

The New Case should be filled-in and Saved

Case Conversion - Sample Request

To convert the case, click on "Conversion Process", a new Ca

Case Detail Edit Close Case Assign To Me Generate Contact Generate Prospect & Contact Conversion Process

Case Number	00012357	GBU	Soda Ash & Derivatives
Date/Time Opened	8/11/2016 21:00	Case Owner	SodaAsh Webform [Change]
Time Spent			
Date/Time Closed			
Application Code	COAPP00027		
Market Segmentation	FISHERIES - AQUACULTURE		

Qualification Section

Customer Type	Prospective customer / distributor	Status	New
Type	Sample Request	Priority	
Subtype	Sample	Case Origin	Website

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Are you sure you want to convert this case into a Sample Request? This case will be closed.

Case Edit
New Case

Case Edit

Error: Invalid Data.
Review all error messages below to correct your data.

Sold To Account	<input type="text" value="Click lookup icon..."/> <input type="button" value="i"/> <input type="button" value="x"/>	Status	<input type="text" value="New"/>
Contact/Demander	<input type="text"/> <input type="button" value="i"/> <input type="button" value="x"/>	Follow up date Reminder	<input type="text" value=""/> [8/11/2016]
Opportunity	<input type="text"/> <input type="button" value="i"/> <input type="button" value="x"/>	Priority	<input type="text" value="Medium"/>
Complaint	<input type="text"/> <input type="button" value="i"/> <input type="button" value="x"/>	GBU	<input type="text" value="--None--"/>
Initial Description	<input type="text" value="Question: Documents request"/>	BU	<input type="text" value="--None--"/> <input type="button" value="i"/>
Subject	<input type="text" value="Documentation - MSDS/SOS"/>	Case Owner	laure pichot
Category	<input type="text" value="--None--"/>	CSR	<input type="text"/> <input type="button" value="i"/> <input type="button" value="x"/>
Sub-Category	<input type="text" value="--None--"/> <input type="button" value="i"/>	Account Manager	<input type="text"/> <input type="button" value="i"/> <input type="button" value="x"/>
Case Record Type	Sample Request		

A new Sample Case is initiated

. Some information are pre-filled

based on what was registered or not on the Webform.

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Case Conversion - Opportunity Conversion

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Case Detail

[Edit](#) [Close Case](#) [Assign To Me](#) [Generate Contact](#) [Generate Prospect & Contact](#) [Conversion Process](#)

Case Number	00012357	GBU	Soda Ash & Derivatives
Date/Time Opened	8/11/2016 21:00	Case Owner	SodaAsh Webform Change
Time Spent			
Date/Time Closed	8/11/2016 23:09		
Application Code	COAPP00027		
Market Segmentation	FISHERIES - AQUACULTURE		

Qualification Section

Customer Type	Prospective customer / distributor	Status	Closed - Accepted
Type	Opportunity	Priority	
Subtype	Quotation	Case Origin	Website

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Are you sure you want to convert this case into a Opportunity? This case will be closed.

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New Opportunity

Select Opportunity Record Type

Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page.

Select Opportunity Record Type

Record Type of new record | Growth-Product Requiring Qualification ▼

Continue Cancel

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Case Conversion - Case Closed

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▼ Qualification Section

Customer Type	Prospective customer / distributor	Status	Closed - Accepted
Type	Customer Request	Priority	
Subtype	Documentation	Case Origin	Website

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Other case(s) can be initiated from these same Webform cases using these same process

The New Cases (Sample Request / Cu

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Direct Answer to Customer	
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- A direct answer can be provided to the customer directly from the Webform using the mail standard editor and Solvia templates :

Case 00024462

Customize Page | Edit Layout | Printable View | Help for this

Show Feed | Click to add topics

Back to List: Email Templates

Cases (Web Form Related) | Opportunities | Case Comments | Open Activities | Activity History | Emails | Case History | Google Docs & Attachments | Approval History

Case Detail

Full | Delete | Close Case | Clone | Sharing | Assign To Me | Generate Contact | Generate Prospect & Contact | Conversion Process | Send Acknowledgement Mail

Send Answer Email

Case Number: 00024462 | GBU: Specialty Polymers
 Time Spent: | Case Owner: Webform [Change]
 Application Code: COAPR00028
 Market Segmentation: FOOD PROCESSING
 Market Application Name: FOOD PROCESSING

Qualification Section

Customer Type: Existing customer | Status: Under Investigation
 Type: Sample Request | Closed Reason: | Priority: | Case Origin: Website
 Subtype: Sample | Website Origin:

Customer Contact Information

Contact Name: | Account Name:
 Web FirstName: Greg | Web Company: Taconic
 Web Name: Wight | Street: | City: Petersburg
 Language: English | Country: United States
 Web Phone: | Region: NAM
 Web Email: greg@taconic.com | Shipping address 1:
 Job Department: Engineering | Shipping city:
 Function: Manager | Shipping country:

Related articles

- [Webforms Process, Steps and Status](#)
- [Webforms Reception](#)
- [Webforms Analysis & Assignment](#)
- [Webforms Closure](#)
- [Webforms Related Lists](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvia.com/>

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We're here to help

Your subject

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

Mark Account | Priority: Low | SUBMIT

you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example