

# Webforms treatment

## Overview

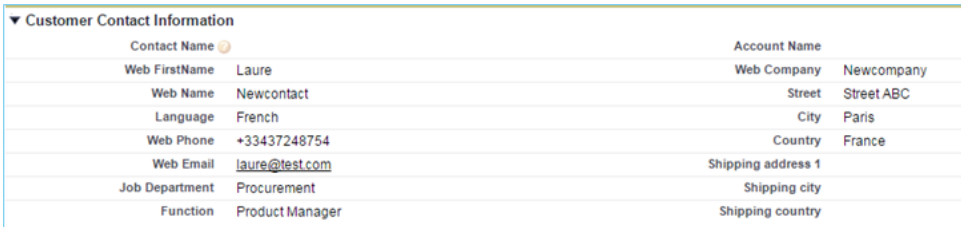
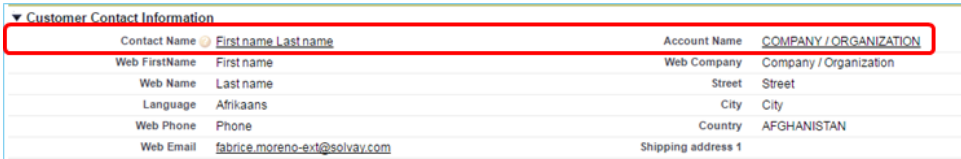
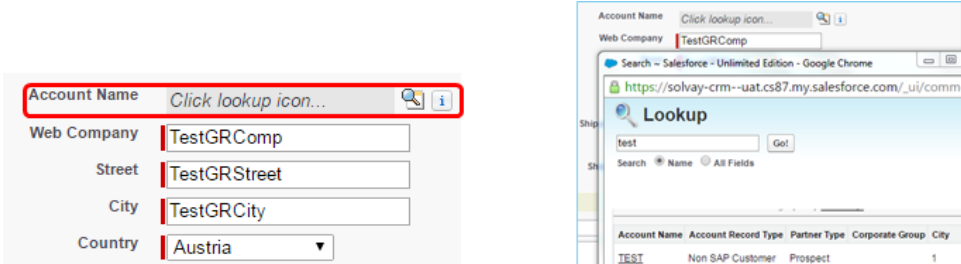
In this section, you will find information about:

- how to treat a webform

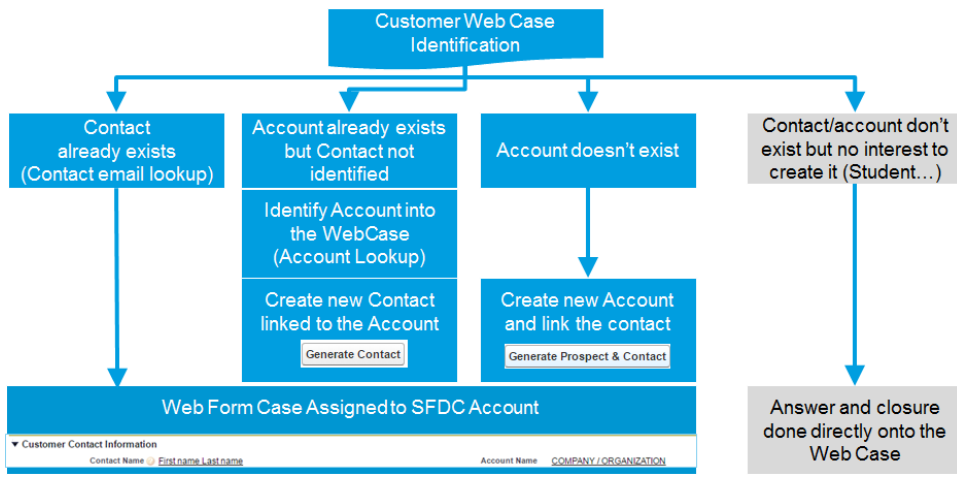
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- [Step-By-Step](#)
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## Step-By-Step

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 &amp; 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 00024462

Case Detail

Case Number: 00024462

Time Spent: [ ]

Application Code: COAPP00028

Market Segmentation: FOOD PROCESSING

Market Application Name: FOOD PROCESSING

Qualification Section

Customer Type: Existing customer

Type: Sample Request

Subtype: Sample

Status: Under Investigation

Customer Contact Information

Contact Name: [ ]

Web First Name: Greg

Web Name: Itali

Language: English

Web Phone: [ ]

Web Email: [greg@taccon.com](mailto:greg@taccon.com)

Job Department: Engineering

Function: Manager

Account Name: [ ]

Web Company: Taccon

Street: [ ]

City: Petersburg

Country: United States

Region: NAM

Shipping address 1: [ ]

Shipping city: [ ]

Shipping country: [ ]

### 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 ▼  
 Subtype: 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**

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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			
Application Code	COAPP00027		
Market Segmentation	FISHERIES - AQUACULTURE		

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**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**

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

Sold To Account	<input type="text" value="Click lookup icon..."/>  	Status	<input type="text" value="New"/>
Contact/Demander	<input type="text" value=""/>  	Follow up date Reminder	<input type="text" value=""/> [8/11/2016]
Opportunity	<input type="text" value=""/>  	Priority	<input type="text" value="Medium"/>
Complaint	<input type="text" value=""/>  	GBU	<input type="text" value="--None--"/>
Initial Description	<input type="text" value="Question: Documents request"/>	BU	<input type="text" value="--None--"/> 
Subject	<input type="text" value="Documentation - MSDS/SOS"/>	Case Owner	laure pichot
Category	<input type="text" value="--None--"/>	CSR	<input type="text" value=""/> 
Sub-Category	<input type="text" value="--None--"/> 	Account Manager	<input type="text" value=""/> 
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	<a href="#">SodaAsh Webform</a> <a href="#">Change</a>
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	<a href="#">Opportunity</a>	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 ▼

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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

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**Direct Answer to Customer**

- 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: COAPR00008  
 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/>

SOLVIA

FAQ | Demo video | Contact us | EN

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*