

Webforms treatment

Overview

In this section, you will find information about:

- how to treat a webform

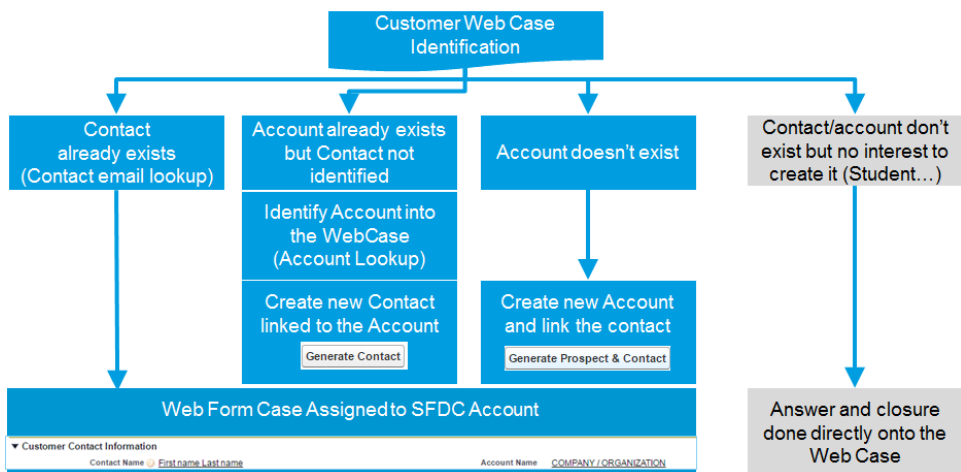
Table of content

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Step-By-Step

Account/Contact Management																	
In the Webform, the prospect /customer information are received	▼ Customer Contact Information <table><tr><td>Contact Name</td><td>Account Name</td></tr><tr><td>Web FirstName</td><td>Web Company</td></tr><tr><td>Web Name</td><td>Street</td></tr><tr><td>Language</td><td>City</td></tr><tr><td>Web Phone</td><td>Country</td></tr><tr><td>Web Email</td><td>Shipping address 1</td></tr><tr><td>Job Department</td><td>Shipping city</td></tr><tr><td>Function</td><td>Shipping country</td></tr></table>	Contact Name	Account Name	Web FirstName	Web Company	Web Name	Street	Language	City	Web Phone	Country	Web Email	Shipping address 1	Job Department	Shipping city	Function	Shipping country
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Web FirstName	Web Company																
Web Name	Street																
Language	City																
Web Phone	Country																
Web Email	Shipping address 1																
Job Department	Shipping city																
Function	Shipping country																
If the contact email already exists in Salesforce database, the Contact & Account will be linked automatically	▼ Customer Contact Information <table><tr><td>Contact Name</td><td>Account Name</td></tr><tr><td>Web FirstName</td><td>Web Company</td></tr><tr><td>Web Name</td><td>Street</td></tr><tr><td>Language</td><td>City</td></tr><tr><td>Web Phone</td><td>Country</td></tr><tr><td>Web Email</td><td>Shipping address 1</td></tr></table>	Contact Name	Account Name	Web FirstName	Web Company	Web Name	Street	Language	City	Web Phone	Country	Web Email	Shipping address 1				
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Web Name	Street																
Language	City																
Web Phone	Country																
Web Email	Shipping address 1																
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)	Account Name Click lookup icon... Web Company TestGRComp Street TestGRStreet City TestGRCity Country Austria Lookup Account Name Account Record Type Partner Type Corporate Group City TEST Non SAP Customer Prospect 1																

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 Webform using the mail standard editor and Solvay templates:

Case 00024462

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

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 | Goods Docs & Attachments | Approval History

Case Detail

Edit 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 Watson Chancel

Application Code COAPP00028

Market Segmentation FOOD PROCESSING

Market Application Name FOOD PROCESSING

▼ Qualification Section

Customer Type Existing customer Status Under Investigation

Type Sample Request Closed Reason

Subtype Sample Priority

Case Origin Website

Website Origin

▼ Customer Contact Information

Contact Name

Web First Name Greg Account Name

Web Name Itali Web Company Taconic

Language English Street

Web Phone City Petersburg

Web Email waze@taconic.com Country United States

Job Department Engineering Region NAM

Function Manager 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 window 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 Edit Help for this Page

New Case

Case Edit Save Save & Close Save & New Cancel

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

Case Information Required Information

Account Name Click lookup icon... Error: You must enter a value Status Open

Subject Documentation Documentation Final communication Sent

GBU --None-- Received Date 8/11/2016 [8/11/2016]

BU --None-- Estimated Resolution Date [8/11/2016]

Product [8/11/2017] [8/11/2016] Requested Resolution Date

Type --None-- Priority Medium

Sub-Type --None-- GBU Customer

Case Conversion - Sample Request

To convert the Case, click on "Conversion Process", a new Case

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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A confirmation window will appear before initiating the new case

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

Case Edit

New Case

Case Edit

Save

Save & Close

Save & New

Cancel

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

Sold To Account

Click lookup icon...

Error: You must enter a value

Contact/Demander

Opportunity

Complaint

Initial Description

Question:
Documents request

Subject

Documentation - MSDS/SDS

Category

--None--

Sub-Category

--None--

Case Record Type

Sample Request

Status

New

Follow up date Reminder

[8/11/2016]

Priority

Medium

GBU

--None--

BU

--None--

Case Owner

laure pichot

CSR

Account Manager

A new Sample Case is initiated.
Some information are re-filled based on what was registered earlier do not 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

Once a new Case has been created, the Webform Case status is "Closed-Accepted"

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

Comments:

Other cases (s) can be initiated from the same Webfarm case using the same process

The New Cases (Sample Request / Cu

Customer Request / Opportunity) are independent from the initial Webform case, they follow the standard processes

Direct Answer to Customer

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

Case 00024462

Customize Page | Edit Layout | Printable | New | 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

Time Spent: 00:00:00

Application Code: COAPR00008

Market Segmentation: FOOD PROCESSING

Market Application Name: FOOD PROCESSING

GBU | Specialty Polymers

Case Owner: Webform (Change)

▼ Qualification Section

Customer Type: Existing customer

Type: Sample Request

Subtype: Sample

Status: Under Investigation

Closed Reason:

Priority:

Case Origin: Website

Website Origin:

▼ Customer Contact Information

Contact Name:

Web First Name: Greg

Web Name: Wahi

Language: English

Web Phone:

Web Email: greg@taconic.com

Job Department: Engineering

Function: Manager

Account Name:

Web Company: Taconic

Street:

City: Petersburg

Country: United States

Region: NAM

Shipping address 1:

Shipping city:

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.solvay.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 documents | Priority List | 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