



# Case Deflection User Guide

*October, 2019*



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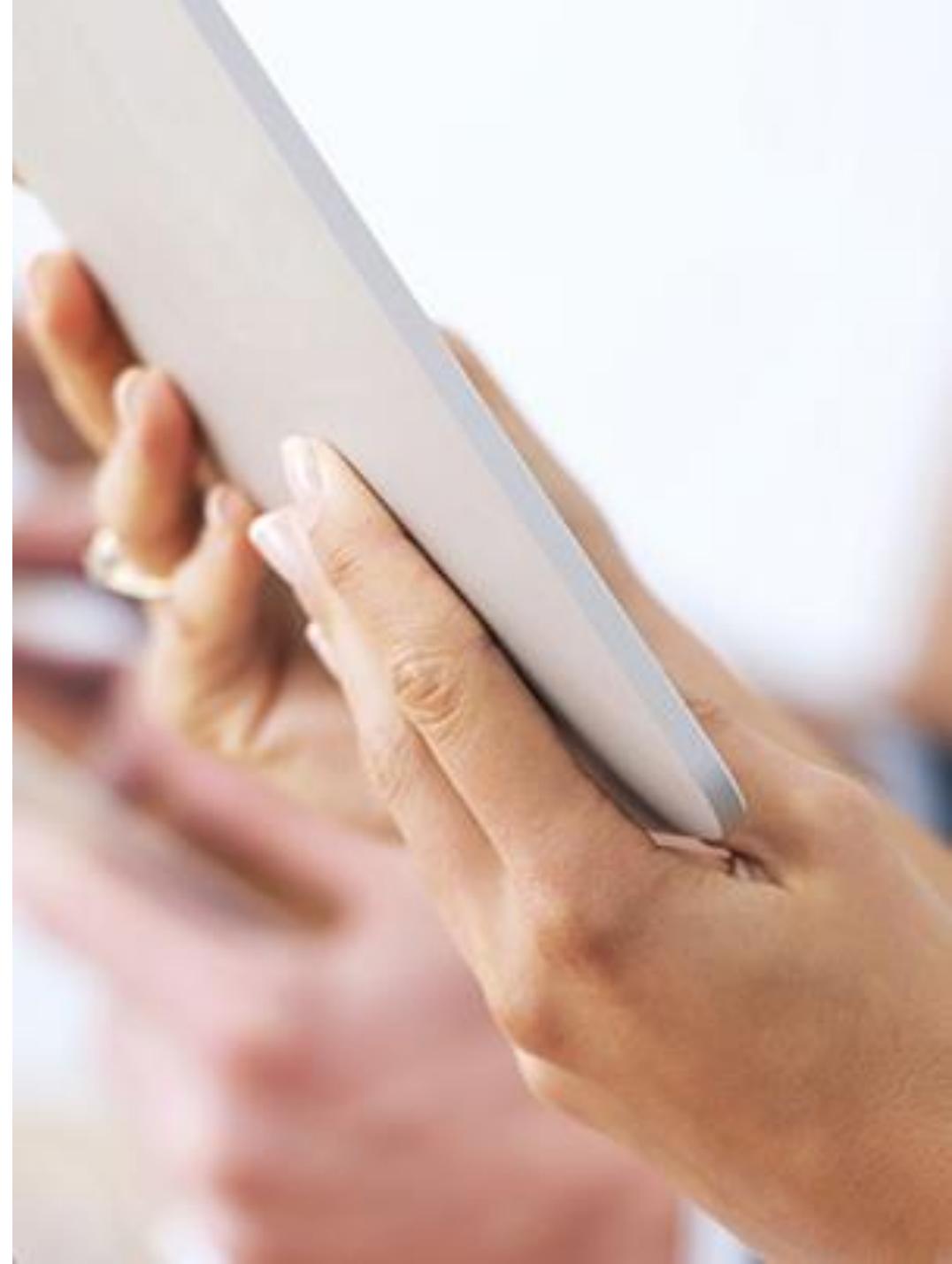
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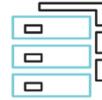


# Introduction

Case Deflections helps Salesforce Community users to search for Knowledge Articles. It provides the related articles based on the Description/Subject. With this the users can get the solutions in no time.



Helps you to resolve issues much faster by suggesting most relevant Knowledge Articles



Enable Self-Service to customers in an efficient way, by suggesting a quick solution



Configurable search fields selection and the targets to look for suggestions



Enable Self-Service to customers in an efficient way, by suggesting a quick solution



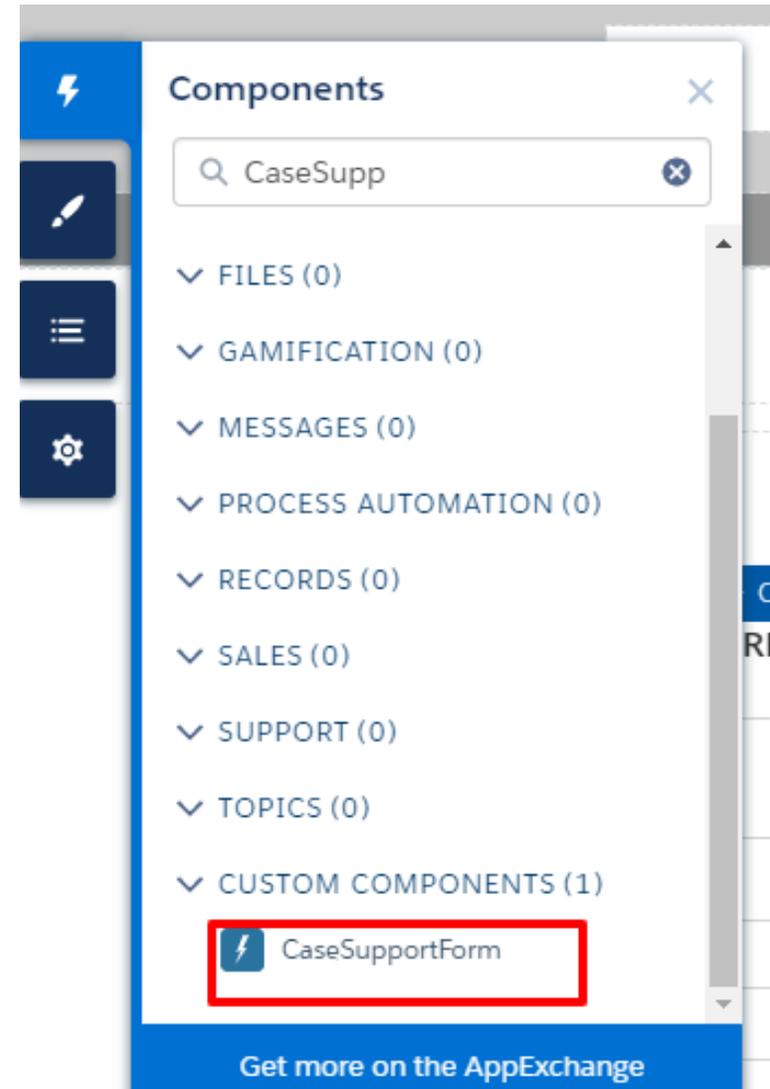
Easy creation of Case from Community and can Configure the Case creation form fields



As few cases will be resolved from Solutions, Case Inflow will be reduced

# Configure Case Deflection Component :

1. Open the Community Builder in your Org
2. Go to Components and then drag the component **'CaseSupportForm'** wherever you want the case creation page to be displayed
3. Similarly Drag the component **'CaseDeflectionComponent'** for search Results.
4. In this Org we placed it under **'Contact Support'** Page



# Contact Support

1. Login as a Community User
2. Click **Contact Support** button on the Home page

The screenshot displays the EPM Home page interface. At the top, there is a dark navigation bar containing the EPM logo, a search bar with the placeholder text 'Search...', a blue 'SEARCH' button, a notification bell icon, and a user profile for 'TIM BARR'. Below this is a secondary navigation bar with a grid icon, 'HOME', and 'TOPICS' with a dropdown arrow. The main content area features a 'WELCOME!' heading, a subtitle 'A place where you can easily find solutions and ask questions', and three tabs: 'FEATURED', 'DISCUSSIONS', and 'MY FEED'. A large blue 'ASK A QUESTION' button is positioned on the right. Below the tabs, the text 'Don't see what you're looking for?' is displayed. At the bottom, two blue buttons are shown: 'ASK A QUESTION' and 'CONTACT SUPPORT', with the latter being highlighted by a red rectangular border.

# Case Creation

3. Case Creation Page will be opened :

## Case Creation Page:

- The fields to be displayed for this page can be controlled from the Fieldset :
- For Logged in Community User '**Case Support Form Fields**' under Case Object
- For Guest User '**Guest User Case Fields**' under the Case Object

### CREATE A CASE

Description

Subject

Case Reason

--None--

Priority

Medium

Case Type

--None--

Create new

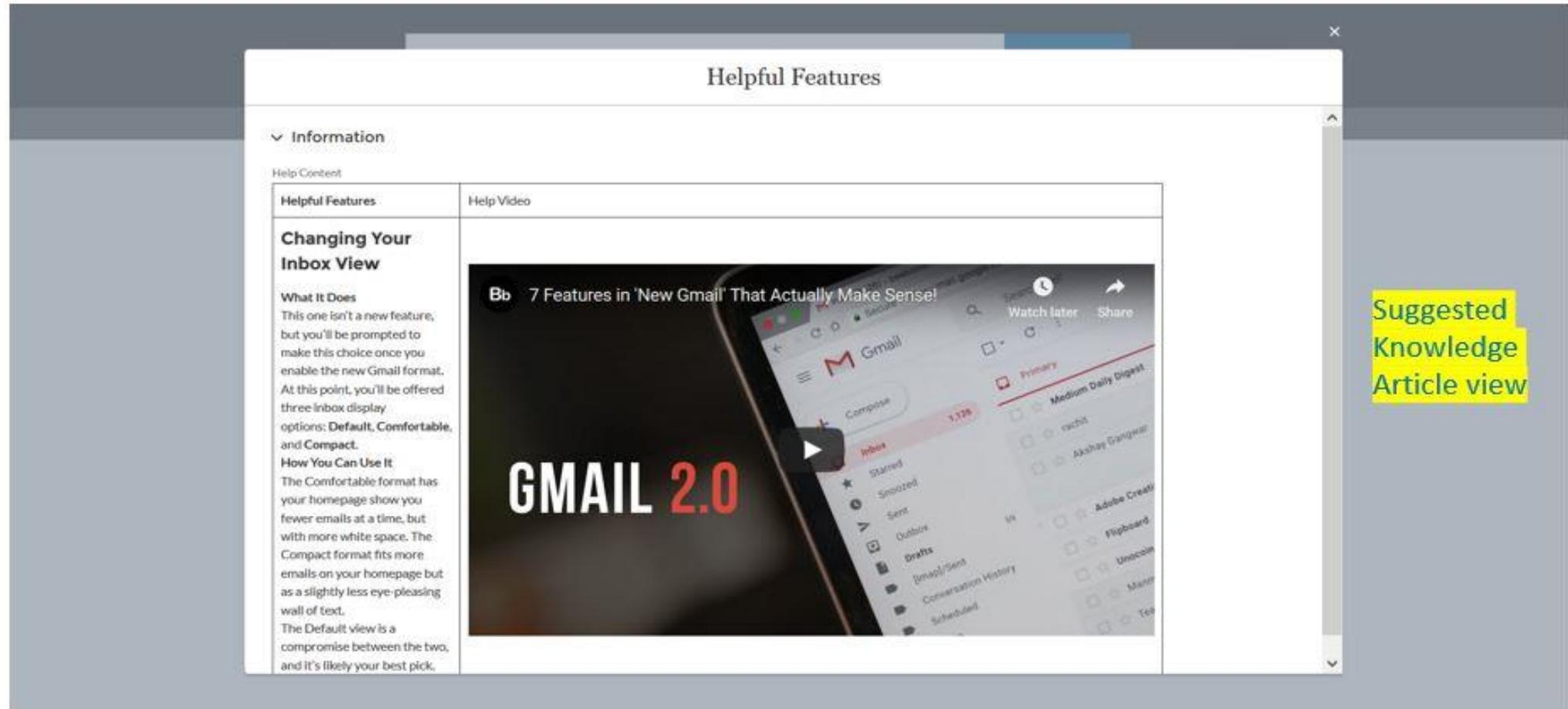
# Searching for Articles

1. While creating the case when you start typing under Subject/Description fields you can see the results on right side of the page (The place where exactly you have placed the **'CaseDeflectionComponent'** )
2. Click on the Article to see the Preview
3. If there are no Articles related to your Search then you may go for Creating a Case.

The screenshot displays the EPM help portal interface. At the top, there is a dark header with the EPM logo, a search bar containing the text "Search...", a blue "SEARCH" button, and a "LOGIN" link. Below the header, a navigation bar includes "HOME" and "TOPICS" with a dropdown arrow. The main content area is split into two columns. The left column, titled "CREATE A CASE", contains a form with the following fields: "Subject" (with "Help" entered), "Description" (empty), and "Priority" (set to "Medium"). A "Create new" button is located below the form. The right column, titled "NEED ANSWERS FAST? Check out these articles...", is enclosed in a rounded red border and lists search results: "Help on Product", "Help on Signup", "Login Issues Help Document", and "Helpful Features". A yellow callout box with the text "Configurable Search criteria and target." has an arrow pointing to the search bar area.

# Article Preview

1. Upon clicking the related Article you can see the Preview



# Configuring Search Fields

Default Search field considerations are as follows :

- **'Subject'** field for Guest User
- **'Description'** and **'Subject'** fields for Authenticated User
- You can customize the fields to be considered for search through Custom Metadata **'Community Configuration'**. Include the fields separated by comma.

Community Configuration (Managed) [Help for this Page](#)

[Back to List: Community Configuration](#)

This Community Configuration is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Community Configuration Detail [Edit](#) [Clone](#)

Label	Authorized User Knowledge Search Fields	Protected Component	<input type="checkbox"/>
Community Configuration Name	Authorized User Knowledge Search_Fields	Namespace Prefix	casedefl
Knowledge Searchable Field	<b>Description;Subject</b>		
Created By		Last Modified By	

[Edit](#) [Clone](#)

<epam>

Thank You!

