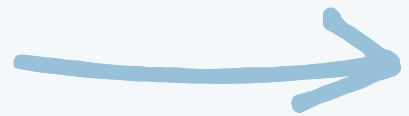
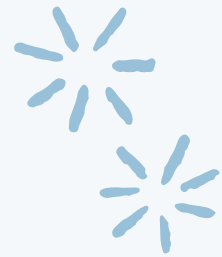


How to

Seamlessly Handle Secure Forms in Salesforce

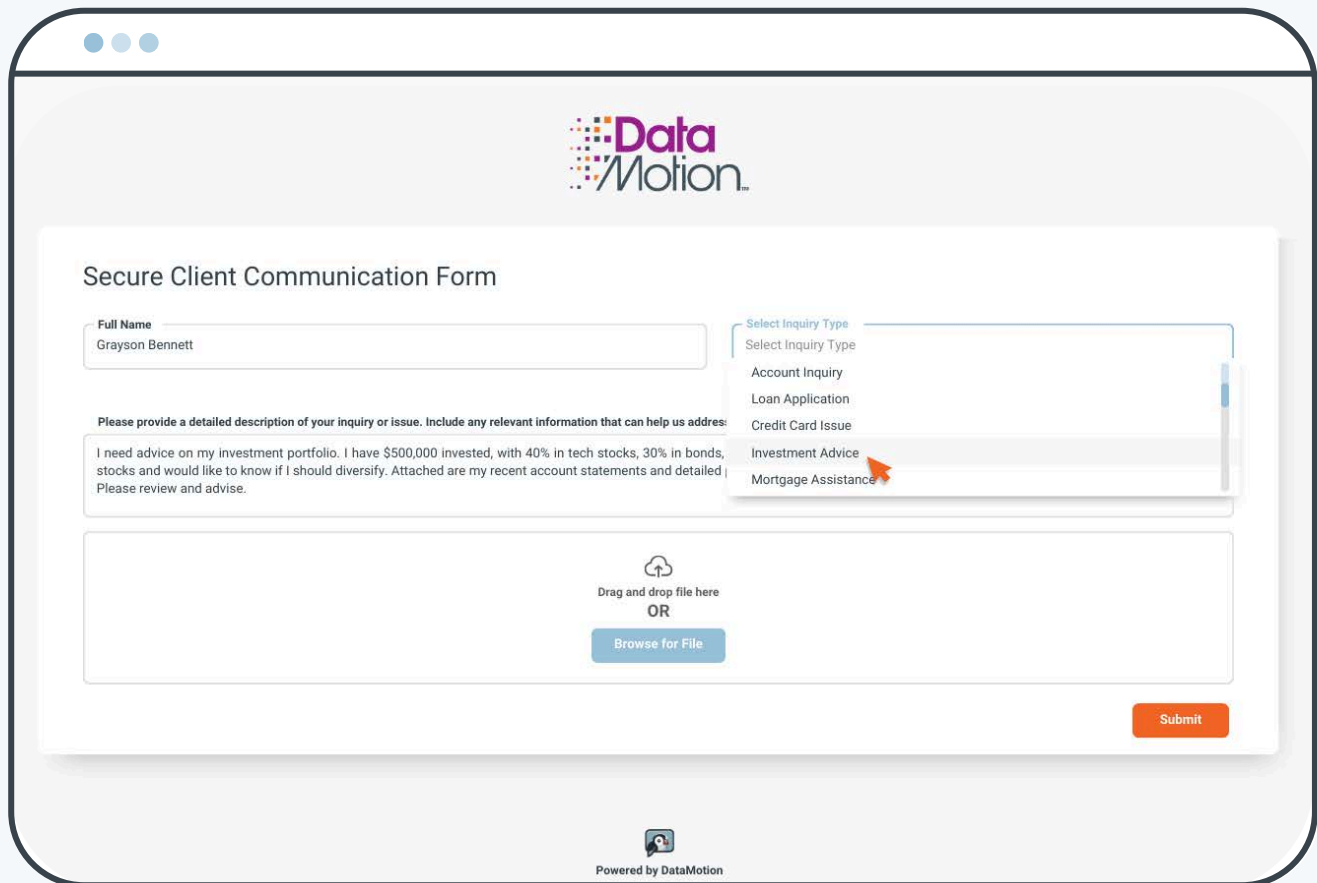




Collecting sensitive data through online forms in Salesforce can be challenging and risky. However, it doesn't have to be. In this guide, we'll explore how the DataMotion Salesforce Case Management integration simplifies this process, enhancing security and streamlining workflows. We'll also explore how it works.

1

A customer submits your custom secure form through your website or portal.



Secure Client Communication Form

Full Name
Grayson Bennett

Select Inquiry Type
Select Inquiry Type
Account Inquiry
Loan Application
Credit Card Issue
Investment Advice
Mortgage Assistance

Please provide a detailed description of your inquiry or issue. Include any relevant information that can help us address:

I need advice on my investment portfolio. I have \$500,000 invested, with 40% in tech stocks, 30% in bonds, stocks and would like to know if I should diversify. Attached are my recent account statements and detailed Please review and advise.

Drag and drop file here
OR
Browse for File

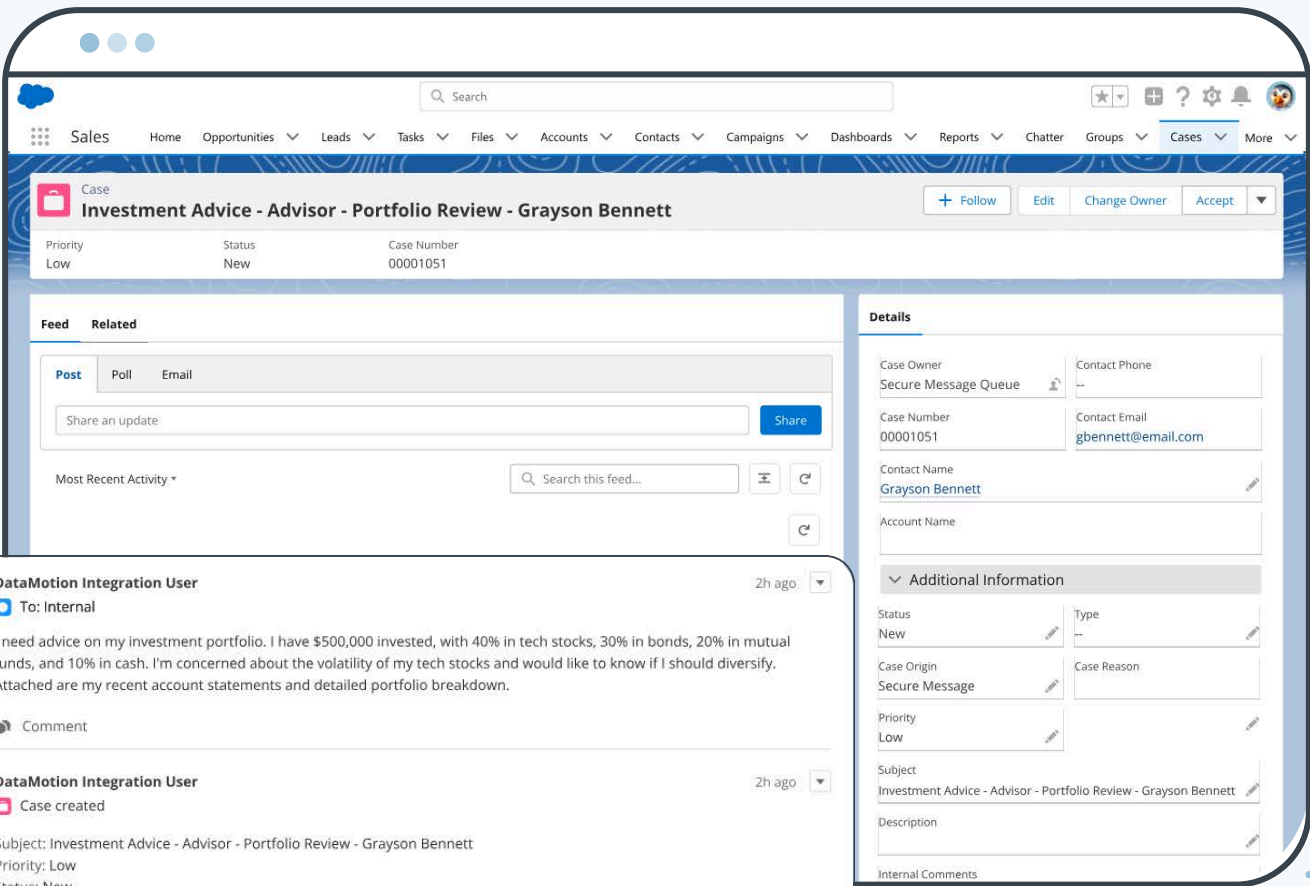
Submit

Powered by DataMotion



2

The form automatically creates a Salesforce case.



The screenshot shows a Salesforce interface for a case record. The case title is "Investment Advice - Advisor - Portfolio Review - Grayson Bennett". The case details include: Priority: Low, Status: New, Case Number: 00001051. The feed shows two entries from "DataMotion Integration User":

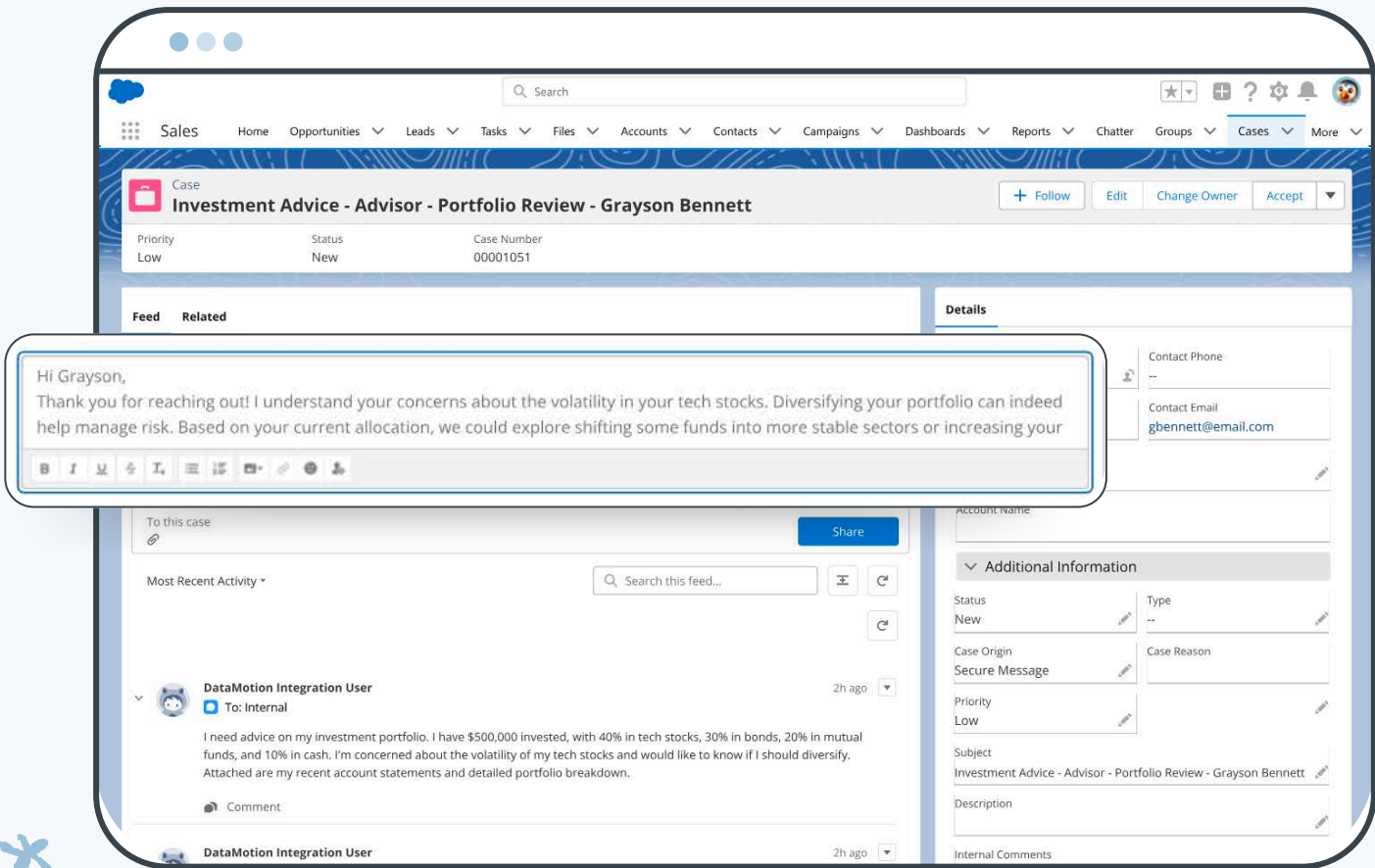
- To: Internal** (2h ago): "I need advice on my investment portfolio. I have \$500,000 invested, with 40% in tech stocks, 30% in bonds, 20% in mutual funds, and 10% in cash. I'm concerned about the volatility of my tech stocks and would like to know if I should diversify. Attached are my recent account statements and detailed portfolio breakdown."
- Case created** (2h ago): "Subject: Investment Advice - Advisor - Portfolio Review - Grayson Bennett, Priority: Low, Status: New, Case Number: 00001051"

The details panel on the right shows fields for Case Owner (Secure Message Queue), Contact Name (Grayson Bennett), Case Number (00001051), Contact Email (gbennett@email.com), Status (New), Case Origin (Secure Message), Priority (Low), and Subject (Investment Advice - Advisor - Portfolio Review - Grayson Bennett).



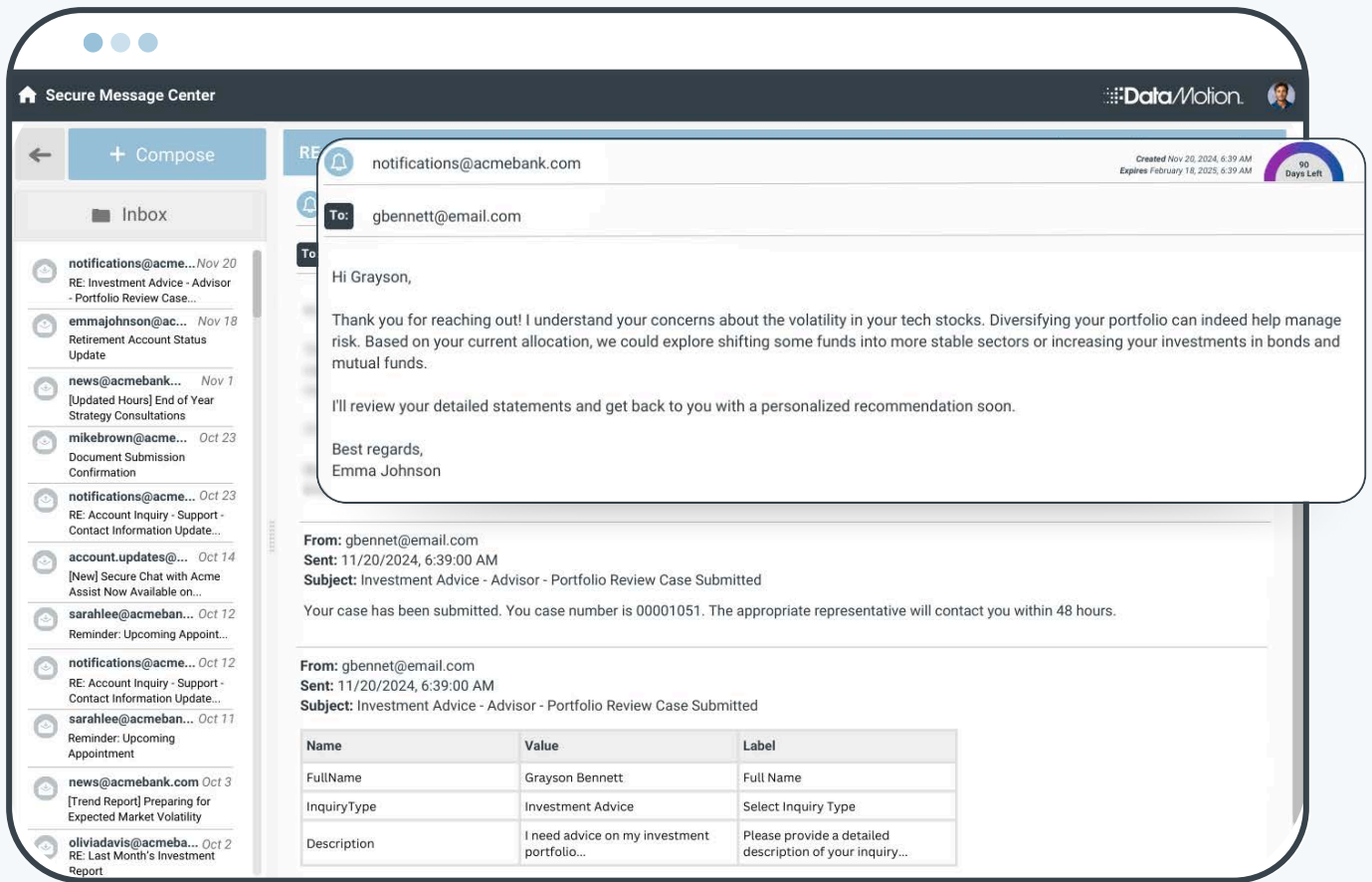
3

Agents access, review, and respond within Salesforce.



4

The customer receives a secure response in their preferred channel.



Secure Message Center | DataMotion

Inbox

- notifications@acme... Nov 20
RE: Investment Advice - Advisor - Portfolio Review Case...
- emmajohnson@ac... Nov 18
Retirement Account Status Update
- news@acmebank... Nov 1
[Updated Hours] End of Year Strategy Consultations
- mikebrown@acme... Oct 23
Document Submission Confirmation
- notifications@acme... Oct 23
RE: Account Inquiry - Support - Contact Information Update...
- account.updates@... Oct 14
[New] Secure Chat with Acme Assist Now Available on...
- sarahlee@acmeban... Oct 12
Reminder: Upcoming Appoint...
- notifications@acme... Oct 12
RE: Account Inquiry - Support - Contact Information Update...
- sarahlee@acmeban... Oct 11
Reminder: Upcoming Appointment
- news@acmebank.com Oct 3
[Trend Report] Preparing for Expected Market Volatility
- olviadavis@acmeba... Oct 2
RE: Last Month's Investment Report

Message Details:

To: gbennett@email.com

Created: Nov 20, 2024, 6:39 AM
Expires: February 18, 2025, 6:39 AM
90 Days Left

Hi Grayson,

Thank you for reaching out! I understand your concerns about the volatility in your tech stocks. Diversifying your portfolio can indeed help manage risk. Based on your current allocation, we could explore shifting some funds into more stable sectors or increasing your investments in bonds and mutual funds.

I'll review your detailed statements and get back to you with a personalized recommendation soon.

Best regards,
Emma Johnson

From: gbennett@email.com
Sent: 11/20/2024, 6:39:00 AM
Subject: Investment Advice - Advisor - Portfolio Review Case Submitted

Your case has been submitted. Your case number is 00001051. The appropriate representative will contact you within 48 hours.

From: gbennett@email.com
Sent: 11/20/2024, 6:39:00 AM
Subject: Investment Advice - Advisor - Portfolio Review Case Submitted

Name	Value	Label
FullName	Grayson Bennett	Full Name
InquiryType	Investment Advice	Select Inquiry Type
Description	I need advice on my investment portfolio...	Please provide a detailed description of your inquiry...



What's Happening Behind the Scenes:



Seamless Secure Forms Integration:

Embed secure form submissions & messaging directly into Salesforce.



Automated & Secure Case Creation: Forms instantly create cases & securely route data to agents.



Streamlined Case Management Workflows:

Faster, more efficient case processing.



Comprehensive Security & Compliance:

Built-in features to protect sensitive data and meet regulatory requirements.



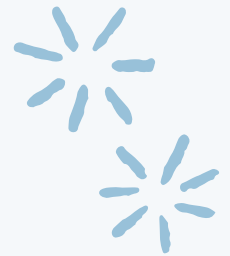


Key Outcomes: Secure, Efficient, Compliant Communications

-  **Faster Resolution Times:** Streamlined workflows accelerate case handling & resolution.
-  **Better Client Experiences:** Faster responses and secure communication increase client satisfaction and trust.
-  **Increased Agent Productivity:** Automation frees up time for higher-value tasks.
-  **Improved Data Accuracy & Integrity:** Automated data transfer minimizes manual errors and ensures data consistency.
-  **Enhanced Security & Compliance:** Proactive security features strengthen data protection and simplify compliance efforts.



Secure. Streamlined. Compliant.



Bring secure forms, messaging,
and case management directly
into Salesforce with DataMotion.

[Let's Talk](#)

[Get More Information](#)

