



# Email to Case User Guide

The Three Grey Monkeys Email to Case solution is an automated process to convert incoming support emails to cases, send automated replies and help your support team manage their work.



Once the EmailToCase product solution is installed on your Dynamics CRM we will check the following:

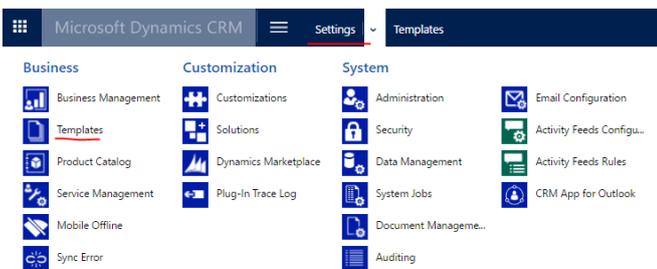
1. The **Support Mailbox** is configured successfully and every user in CRM will be able to send, receive emails from Dynamics CRM on behalf of this **Support Mailbox**.

2. Auto response Emails will be sent to your customer on **Creation, Assigning and Resolving** of case so we will help customise these templates for your company.

## Instructions to change templates in Dynamics CRM

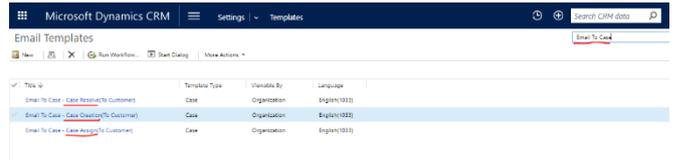
Step: -1

Settings-->Templates-->Email Templates



Step: -2

On Search area enter 'Email to Case' and then search



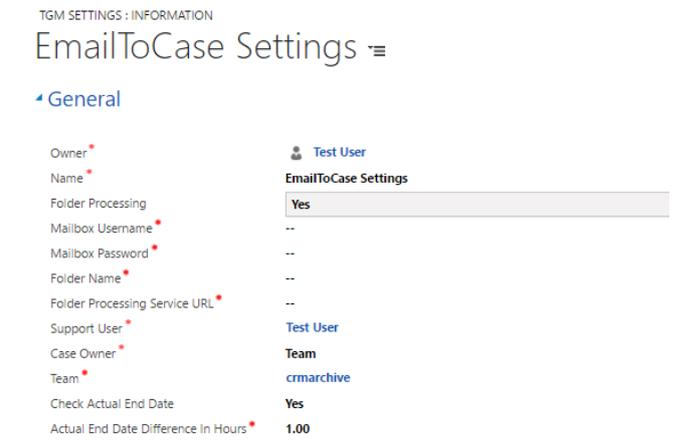
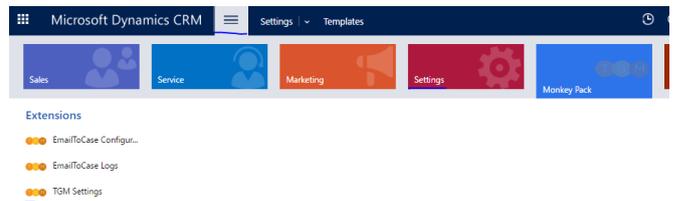
Open each one of them and modify as per your company needs and save.

3. Make sure to create record in **TGM Settings**, it won't create any cases until configuration record is created in **TGM Settings**

## Instructions to create record in TGM Settings

Step: -1

Monkey Pack --> TGM Settings --> Click on New



**Name:** name of the record can be given according to your choice.

**Ex:** EmailToCase settings etc.



# Email to Case User Guide

**Folder Processing:** Used to move the mail from inbox to some other specified folder in Exchange mailbox.

**Note:** works only for Exchange mailbox.

**Mailbox User name:** Enter Username of the mailbox

**Mailbox Password:** Enter password of the Mailbox

**Folder Name:** Enter name of the folder to which you want to move processed emails.

**Folder Processing Service URL:** Web Service URL, which you used to move emails from inbox to other.

<http://clientservices.threegreymonkeys.com/ExchangeCommunicator/ExchangeCommunicator.asmx>

**Support User:** Select a User, which is used as a support User for your Dynamics CRM and who has active mailbox.

**Case Owner:** Team/User

is used to set the owner of the created case.

Make sure the selected User/Team should have required privileges (Security Roles) to be a case owner. If not have please give TGM.EmailToCase security role to that User/Team.

## Case Creation Process: -

Whenever one of your customer send an email to your support mailbox, once that email is synced with Dynamics CRM, a plugin will trigger and a case will be created accordingly.

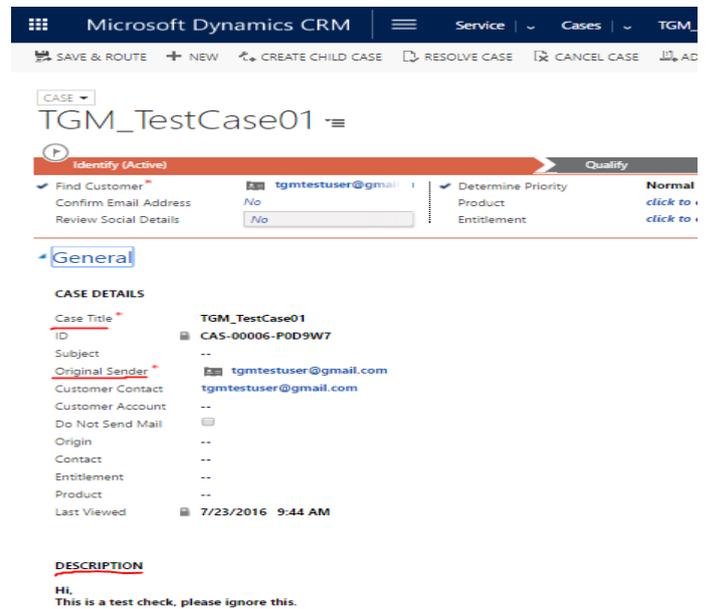
Before creating the case, plugin will check the below two conditions

1. Account/Contact already exist with received email address or not
2. The received email is a new case or reopening of existing case

### 1. Account/Contact already exist with received email address or not

Before creating the case, first the plugin will check if there are is an account/contact already in Dynamics CRM with the incoming email address?

If any account/contact already exists with the received mail address, then the case will create and linked to the existing account/contact as a customer (Original Sender).



**Case Title** will be set with subject of received mail.

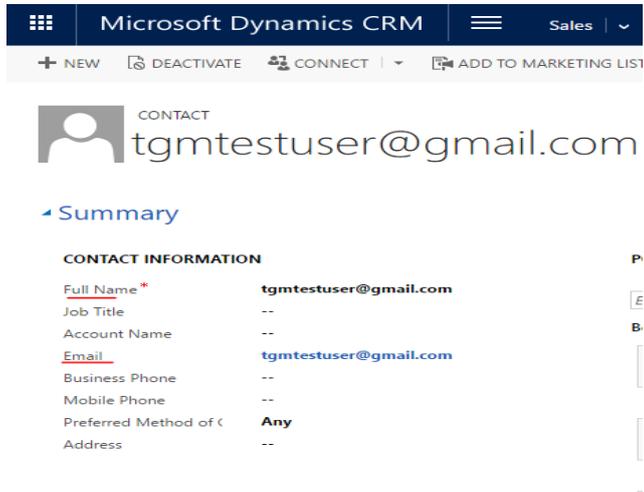
**Description** will be set with body of received mail.

**Case Owner** will be set as per the TGM Settings.



# Email to Case User Guide

If there is no account/contact exists with received mail address, then plugin will create a contact.

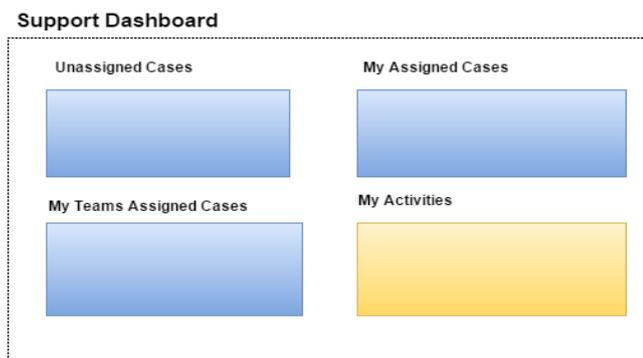


Contact **Full Name**, **Email** will be setting as address of received email.

## 2. If the received mail is regarding creation of a new case or reopening of the existing case

On sync of received email with Dynamics CRM, the plugin will check whether email contains value in regarding field or not. if it contains value then plugin won't create any new case, just the regarding case will be reopened if it is resolved.

## Support Dashboard



In support dashboard we have below views

1. My Assigned Cases
2. My Team Assigned Cases
3. My Activities
4. Unassigned Cases

### 1. My Assigned Cases

Shows the list of **Active Cases**, which are assigned for current logged in user.

### 2. My Team Assigned Cases

Shows the list of **Active Cases** assigned to the users, who are the part of current logged in user team.

### 3. My Activities

Shows the list of scheduled, open activities for current logged in user.

### 4. Unassigned Cases

Shows the list of **Active Cases**, which need to be assign.

## Grid Colouring

We have created two custom date fields on case entity, one is the Last Viewed time and another one is the Latest Activity created time. We then customised the Active Cases and My Active Cases views by colour coding rows to highlight the state of that case.

**Note:** Latest Activity is only changed when an email is received from the customer.



# Email to Case User Guide

**Red** - If the Latest Activity created time is earlier than Last Viewed time

**Green** - If the Last Viewed time is earlier than Latest Activity created time.

**Yellow** - If the record hasn't been updated in the last 24 hours

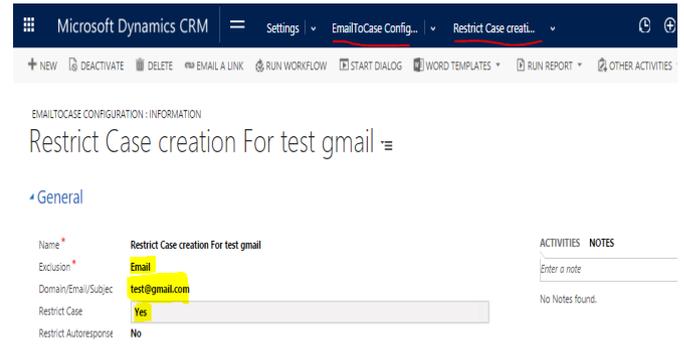
**Note:** Can set only Dropdown fields.

if we don't want records to be created when an email is received from a specific email address

**Ex-1: Restricting case creation if the email comes from 'test@gmail.com'**

My Active Cases

Case Title	Case Number	Priority	Origin	Customer	Status Reason	Is Earlier	Modified On	Created On
Service requested soon	C45-0135-191697	Low	Web	Humbogosa Insurance	In-Progress	Yes	7/12/2016 12:06 PM	5/12/2016 7:27 AM
test	C45-0003-421618	Normal	Text	Test Account	In-Progress	Yes	7/12/2016 2:19 PM	7/12/2016 2:19 PM
Test Case Creation	C45-0003-421618	Normal	Text	Test Account	In-Progress	No	7/12/2016 2:55 PM	7/12/2016 2:50 PM
Need service feature question	C45-0132-571204	High	Email	Fourth Coffee	In-Progress	Yes	7/12/2016 8:53 AM	5/12/2016 7:27 AM
Test Message	C45-0002-431322	Normal	Text	testuser@comarche.com...	In-Progress	Yes	7/12/2016 11:52 AM	7/12/2016 2:07 PM
Service information required	C45-0132-431322	High	Web	Humbogosa Insurance	In-Progress	Yes	8/4/2016 4:34 PM	5/12/2016 7:27 AM
Test Case	C45-0003-4162041	Normal	Text	Alpine Ski House	In-Progress	Yes	8/4/2016 4:34 PM	7/12/2016 11:45 AM
Test Case	C45-0004-451610	Normal	Text	test@comarche.com...	In-Progress	Yes	8/4/2016 4:34 PM	7/12/2016 2:14 PM
Test Case	C45-0007-441327	Normal	Email	testuser@gmail.com	In-Progress	No	8/4/2016 4:40 PM	7/12/2016 9:34 AM



## Instructions to Install solution

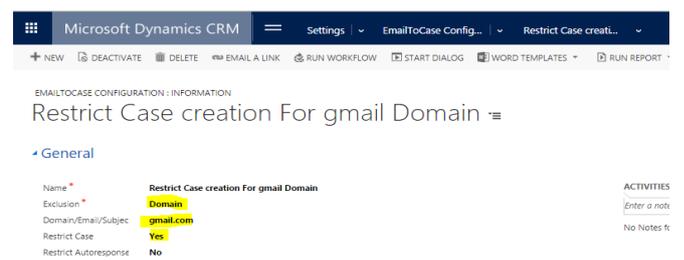
1. Install managed solution
2. Create record in TGM Settings
3. Ensure mailbox is configured properly

If we don't want cases to be created when email comes from a specific domain

**Ex: Restricting case creation if the email comes from Gmail domain.**

## EmailtoCase Configurations

- Used to restrict creation of case by excluding Emails received from specific domain, Mail address and or text in the subject line.
- Auto response Email notifications (Case Creation/Assign/Resolve) can be restricted for specific domains/Email/Subject.
- Create rules to preset values in the Case form depending on the sender.



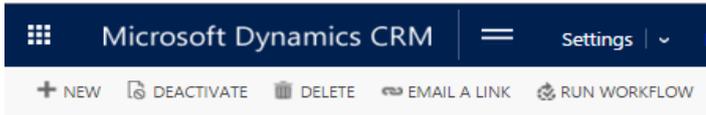
**Ex:** Set case type if it is received from specific domain

**Note:** can enter multiple Domains with pipe '|' separator

**Ex-3: Restricting case creation if the received email contains specific text in the subject.**



# Email to Case User Guide



EMAILTOCASE CONFIGURATION : INFORMATION

## Restrict Case creation for subject

### General

Name *	Restrict Case creation for subject
Exclusion *	Subject
Domain/Email/Subject	auto   auto reply   replay
Restrict Case	Yes
Restrict Autoresponse	No

**Note:** can enter multiple Subjects with pipe '|' separator

**Ex-3: Restricting to send Auto response mails and setting a field value on created cases for a specific email address.**



EMAILTOCASE CONFIGURATION : INFORMATION

## Restrict auto response for email

### General

Name *	Restrict auto response for email	ACTIVITIES
Exclusion *	Email	Enter a not
Domain/Email/Subject	test@gmail.com	No Notes f
Restrict Case	No	
Restrict Autoresponse	Yes	

### Set Values

Field Name	tgm_casetype	Value	30000
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## Created case



CASE

## TGM\_test Case\_001



Find Customer \* TGM test\_001  
Find Contact click to enter  
Find Case TGM\_test Case\_001

### General

#### CASE DETAILS

Case Title *	TGM_test Case_001
Case Type	It
ID	CAS-00667-Z8V6G1
Subject	--
Customer *	TGM test_001
Origin	--
Contact	--
Entitlement	--

#### POSTS ACTIVITIES KB RECORDS NOTES

All | Add Phone Call | Add Task | ...

We didn't find any activity records.