Email to Case Automation Add-on User Guide

For Microsoft Dynamics CRM

IOTAP's Email to Case Automation (E2CA) add-on helps your company efficiently manage the support process by automatically creating cases from emails and auto-populating case fields from the email body.

Solution Version: 3.0

User Guide Version: 3.0

Table of Contents

1 IOTAP MS CRM Add-ons

1.1 Record Clone - Microsoft Dynamics CRM

Record Cloning or Record Copying for Microsoft Dynamics CRM allows you to create a duplicate record with the same values as the parent record.

Features:

- Clone following entities:
  - Opportunity & it's product lines
  - Quote & it's product lines
  - Invoice & it's product lines
  - Order & it's product lines
  - Accounts, Contacts, Leads
  - Product & it's price-list items
  - Case
  - Goals
- Can also clone notes and any related entities
- Exclude fields from entity that should not be cloned
- Works from Form, Grid, Outlook
- Can be customized for Cloning custom and related entities

Online Store

1.2 Auto Number - Microsoft Dynamics CRM

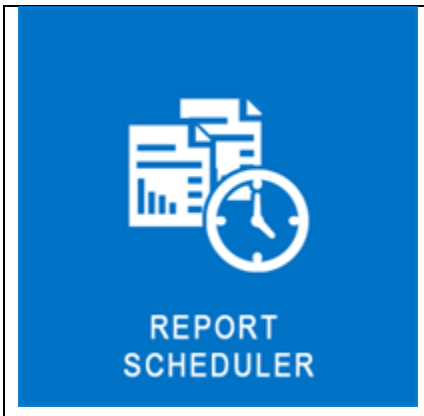
IOTAP's Auto Number add-on for Microsoft Dynamics CRM allows automatic generation of unique reference IDs for all entities across the CRM system. The format of the reference ID can be customized to suit your business requirements.

Features:

- Easy configuration and setup
- Supports all System as well as Custom entities
- Customize the prefix, suffix, starting number as per your business needs
- Support's Constants, Random Number's, letters, dates, times
- Can be applied to multiple fields of same entity
- Automatic plugin registration
- Functionality to update existing records

Online Store

1.3 Report Scheduler - Microsoft Dynamics CRM Online and On-Premise

	IOTAP's Report Scheduler add-on enables easy scheduling of CRM data which is delivered automatically via email. It works from within CRM and requires no separate server. The trial version of Report Scheduler is available for immediate download and setup. <u>Features:</u> • Interface to set-up recurring and automated email of CRM data on a periodic basis • Event Reminder (Birthday \ Anniversary \ Contract expiry \ Opportunity close date approaching, etc.) • Scheduled data back-up in the form of CSV or TXT files • Users can easily receive CRM data in few clicks without any IT support • Mobile Friendly (option to have the data sent in the body of the email) • Direct navigation to CRM records from email via a click link • Handles scheduling across multiple time-zones • Takes care of all visibility rules set in Microsoft CRM • Can send the data even to non-CRM user email addresses (with admin approval) • Secured Distribution allows blocking of any email addresses and any domain from receiving your scheduled reports. • Customizable email template allows adding of corporate logos, color, typefaces, signatures and other brand related images. Online Store

1.4 Email to Case Automation - Microsoft Dynamics CRM

Email to Case Automation helps your company efficiently manage the support process by automatically creating cases from emails and auto-populating case fields from the email body.

Features:

- Supports multiple queues
- Automatic linking to Contact or Account
- Email spam protection
- Email loop protection
- Email domain address exclusion
- Supports HTML email
- Automatic Case Owner assignment – multiple options
- Copy attachments to Case
- 100% Native - works from within CRM
- Email notifications for external and internal users
- Multiple Email Templates with additional functionality to add direct links to CRM record
- Fully configurable
- Can be customized based on individual requirements

Online Store

1.5 Birthday Reminder - Microsoft Dynamics CRM

Birthday Reminder add-on helps Sales and Marketing team keep track of birthdays of CRM Contact by displaying the Upcoming Birthdays on the Dashboard. It displays the Contact Name, Day - Month and Age.

Features:

- Be notified on the Dashboard as the birthday of each Contact approaches
- CRM Users can select contact whose Birthday reminder needs to be activated.
- Ability to browse to contact details form directly from the Birthday Reminder panel in dashboard

Online Store

2 Product Overview

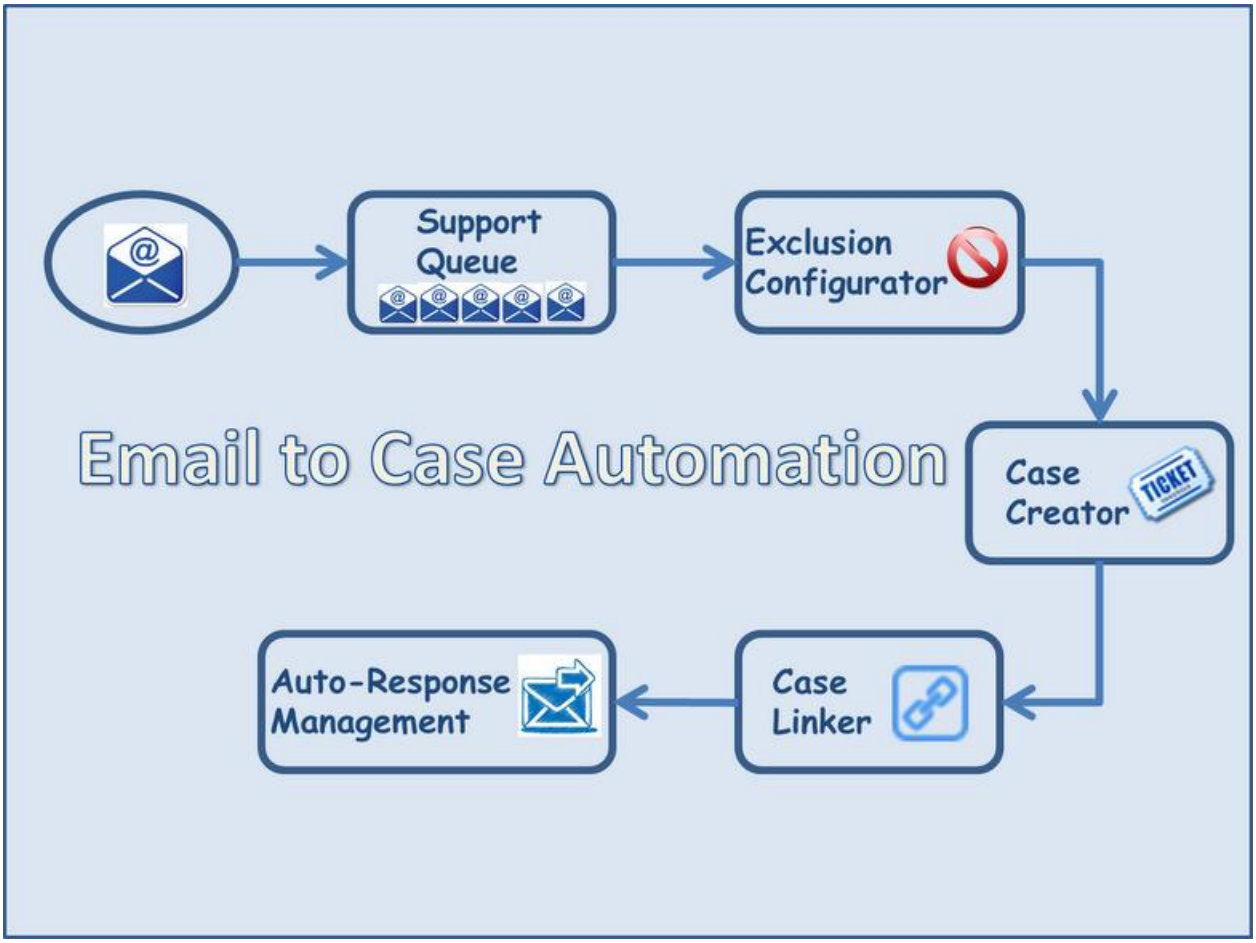
IOTAP's Email to Case Automation add-on helps your company efficiently manage the support process by automatically creating cases from emails and auto-populating case fields from the email body.

The standard functionality that can be achieved via workflows is very basic and has lots of limitations. E2CA not only fills these gaps but also takes the case creation automation to the next level.

Features

- Supports multiple queues
- Automatic linking to Contact or Account
- Email spam protection
- Email loop protection
- Email domain address exclusion
- Supports HTML email
- Automatic Case Owner assignment – Multiple options
- Copy attachments to Case
- 100% Native - works from within CRM
- Email notifications for external and internal users
- Multiple Email Templates with additional functionality to add direct links to CRM record
- Fully configurable
- Can be customized based on individual requirements

Process Flow:



Support Queue: Email to Case Automation can monitor multiple mailboxes creating tickets or cases in CRM automatically whenever emails are received.

Exclusion \ Inclusion Configurator: Unwanted case creation can be avoided by excluding emails received from specific domain and email addresses. Further email loop protection settings will also allow exclusion of auto-responded emails. (There is also a provision to over-ride the exclusion criteria for certain user-scenarios).

Case Creator: Case record is created with case-fields automatically populated from email as well as fields that have been configured with default values. Some of the fields that could be auto-populated are: case title, description, origin, subject, etc.

Case Linker: Case record is linked with either contacts or accounts based on the settings. If no match is found then the case could also be linked to a dummy account or dummy contact.
If the email is regarding an existing case then the search algorithm can also search for case ID in the subject line (all of this is configurable).

Case Owner Assignment: There are multiple options available for Case Owner assignment:

- Default User / Default Team: can select a default user or team that would be the owner of the new case.
- Round Robin Case Assignment: Case would be assigned to the members of the team (sequence: alphabetically sorted by First Name). Please note that because of technical limitations, this algorithm will not work in CRM Online.
- User – Account / Contact Owner: The owner of the Contact or Account that was linked to this case will become the owner of the new Case.
- User – Account / Contact Custom: The CRM user selected (in the field (eg. Preferred User) of Contact or Account will become the owner of the new case.

Auto-Response Management: Automatic email notifications (both internal and external) could be sent on case creation based on the email template selected. Further there is an additional functionality to add direct URL for case record in CRM (this would allow CRM users to directly browse to the case record in CRM).

2.1 Product Version & Supported CRM Deployment modes

Product Version: 3.0.2011.0001, 3.0.2015.0001
Please note that build v3.0.2011.0001 will work with CRM 2011 as well as CRM 2013 and build v3.0.2015.0001 will work with 2015 only.
Supported CRM Deployment models: CRM Online, CRM On-Premise, IFD, Partner Hosted
Pre-requisite:

1. Email Router needs to be set-up with an incoming profile for at least one Queue

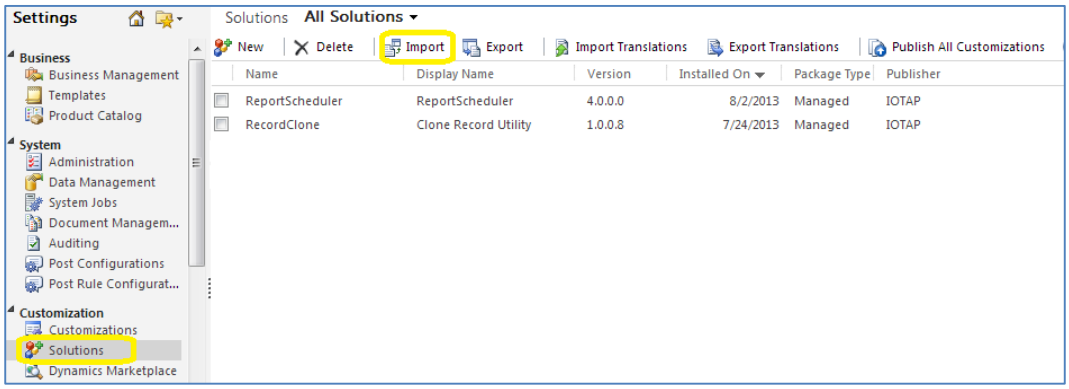
2.2 Trial Mode

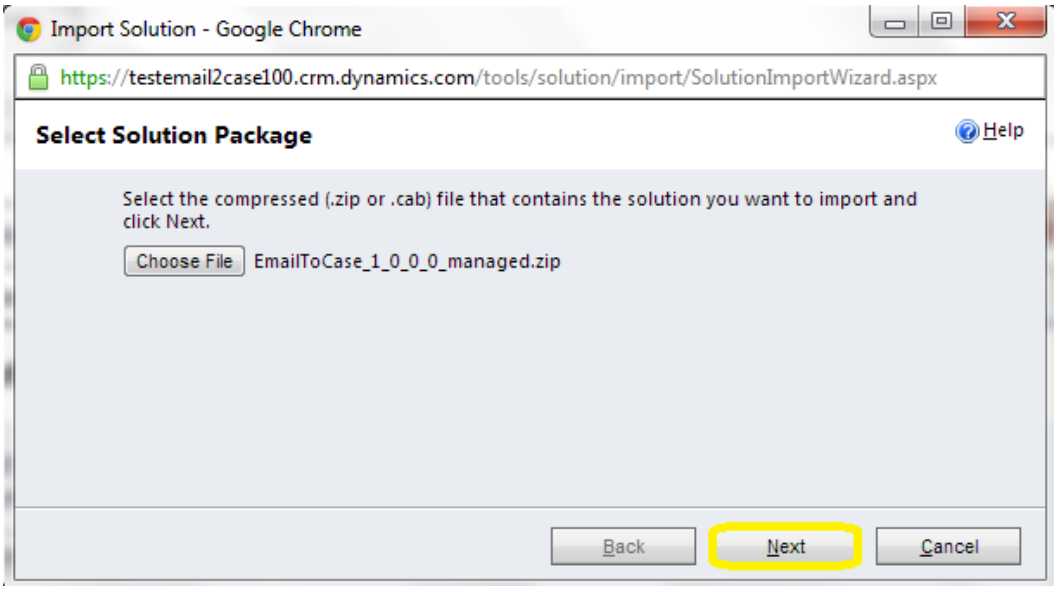
The Trial mode has all the functionalities of the commercial version.

2.3 Installation Process

If you already have an email2case previously installed then kindly uninstall it before installing the newer solution.

Installing the "Email to Case Automation" Solution file: Click "Import" as shown below:




Import Solution - Google Chrome
https://testemail2case100.crm.dynamics.com/tools/solution/import/SolutionImportWizard.aspx
Select Solution Package
Help
Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next.
Choose File
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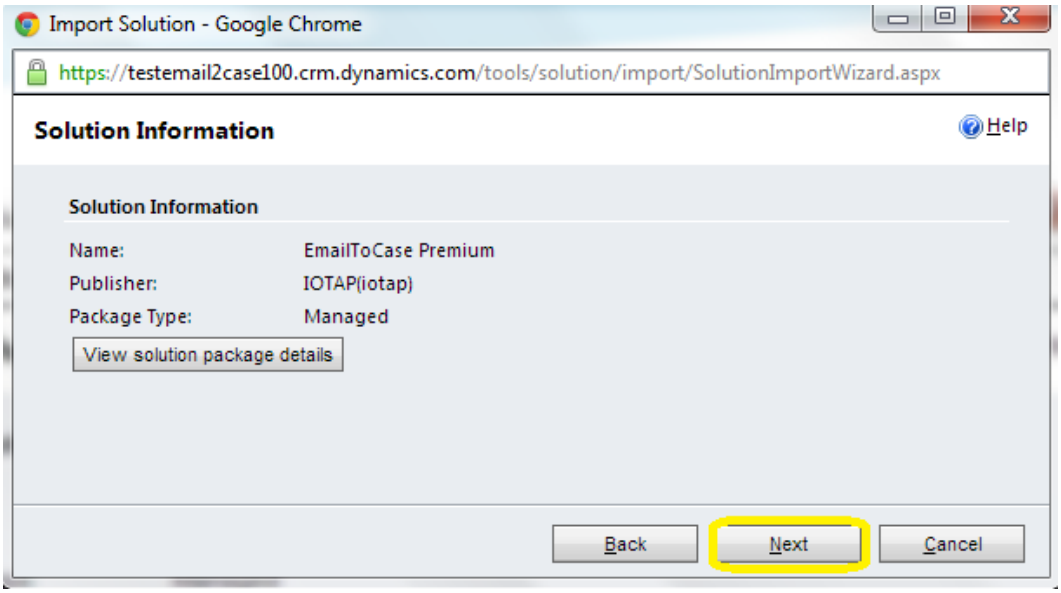
Import Solution - Google Chrome
https://testemail2case100.crm.dynamics.com/tools/solution/import/SolutionImportWizard.aspx
Solution Information
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Publisher:
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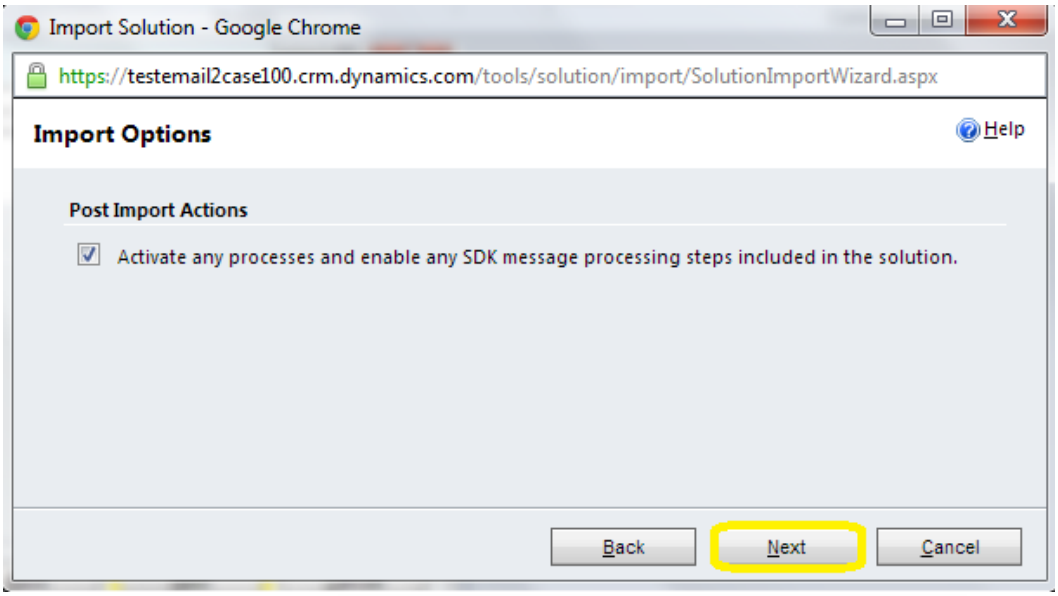
Import Solution - Google Chrome
https://testemail2case100.crm.dynamics.com/tools/solution/import/SolutionImportWizard.aspx
Import Options
Help
Post Import Actions
Activate any processes and enable any SDK message processing steps included in the solution.
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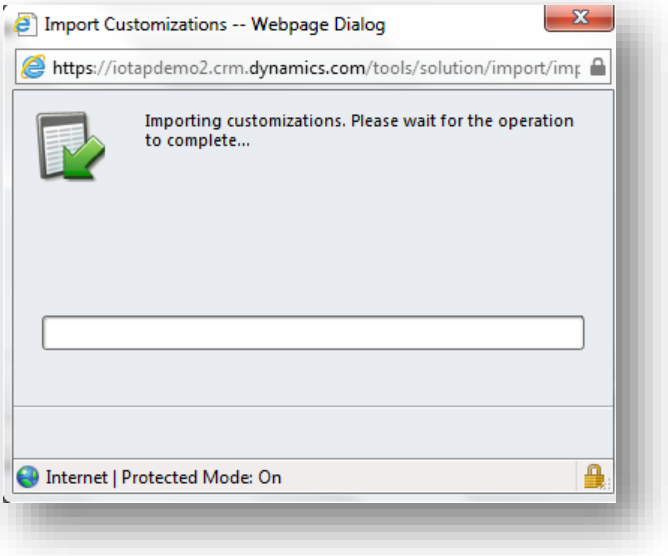
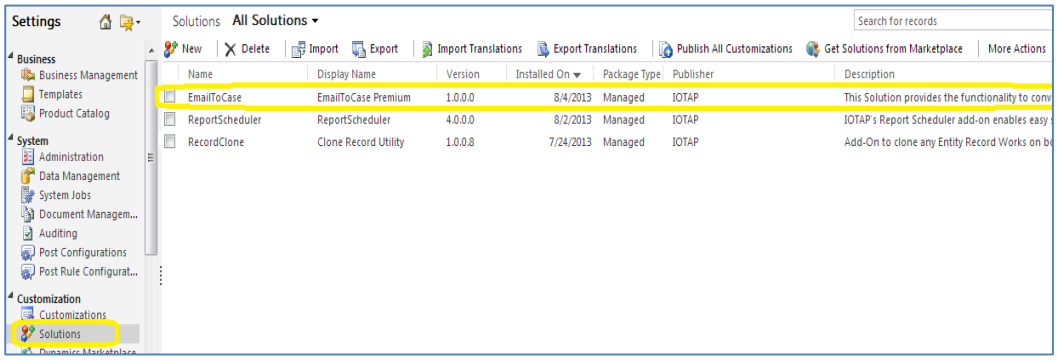

Import Customizations -- Webpage Dialog
https://iotapdemo2.crm.dynamics.com/tools/solution/import/imp
Importing customizations. Please wait for the operation to complete...
Internet | Protected Mode: On


Settings
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Search for records
New
Delete
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Import Translations
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Publish All Customizations
Get Solutions from Marketplace
More Actions
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Templates
Product Catalog
System
Administration
Data Management
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Document Managem...
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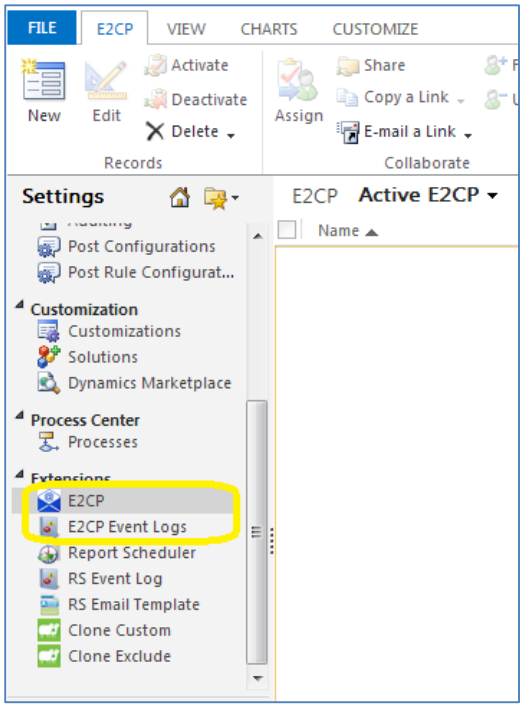
8/2/2013
Managed
IOTAP
IOTAP's Report Scheduler add-on enables easy
RecordClone
Clone Record Utility
1.0.0.8
7/24/2013
Managed
IOTAP
Add-On to clone any Entity Record Works on b

After successful import, the “E2CA” and “E2CA Event Logs” link will appear in *Settings section* as shown below: (Please refresh the page after installing the add-on)

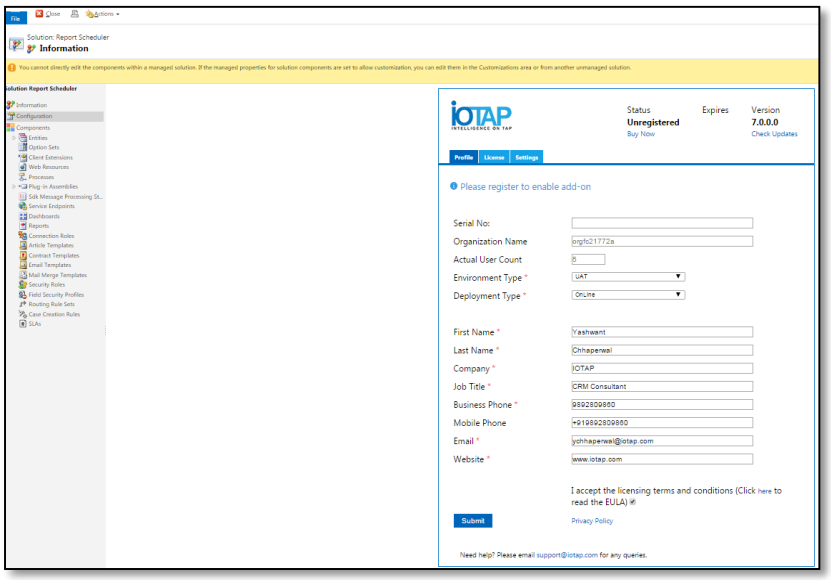


Event Logging: Email to Case Automation add-on also has an event logging section which is visible under: Settings ➔Extensions➔E2CA Event Log.

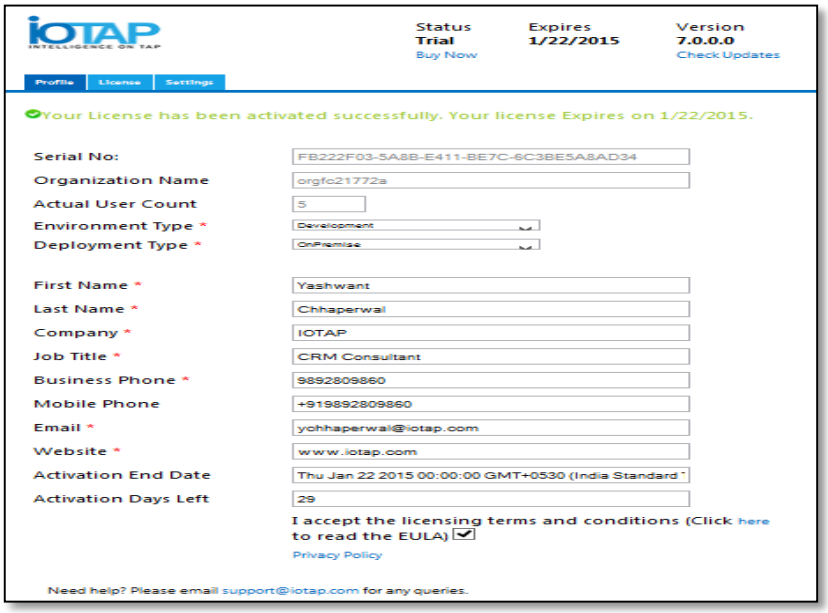
2.4 Activating the Trial License

To activate the trial license, kindly register the add-on online as per the steps below:

Registering the add-on: Browse to Settings>> Solutions and double-click the installed add-on solution file. In profile tab: after filling in all details - click “Submit” button.



This will register the add-on with IOTAP system and automatically activate the add-on in trial mode.
On successful activation you will receive a message "Your license has been activated successfully" as shown below:



2.5 Activating the Paid License

Step 1: Purchase the add-on from IOTAP website

Step 2: Register the add-on online (kindly refer section 2.4 "Activating the Trial License - Registering the add-on")

Step 3: Kindly email the below details to support@iotap.com

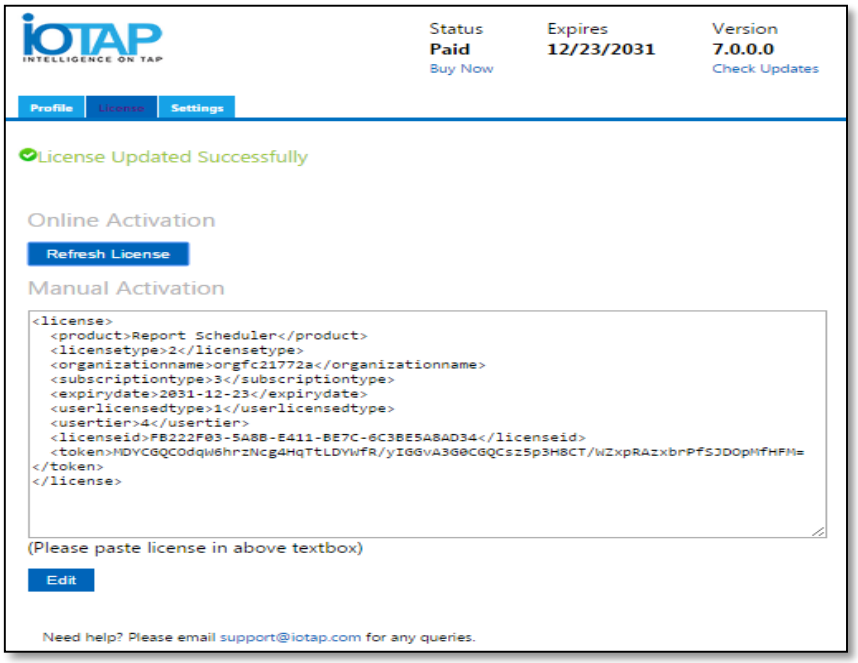
1. CRM Unique Organization Name: Please browse to Settings >> Customizations >> Developer Resources
2. CRM Version (2011 / 2013 / 2015):
3. CRM Deployment (Online / On-Premise):

Step 4: You will receive a confirmation email from IOTAP Support that your license has been activated.

Step 5: Kindly browse to License page and click "Refresh License". This will automatically connect to IOTAP server and get the updated license file. You will notice that the Status (in page header) has changed to Paid.

2.6 Refreshing License

Kindly browse to License tab and click "Refresh License". This will automatically connect to IOTAP server and get the updated license file.



2.7 Manual Activation

If you are not able to activate the add-on on-line then request support@iotap.com for the license code along with below details:

1. CRM Unique Organization Name: Please browse to Settings >> Customizations >> Developer Resources
2. CRM Version (2011 / 2013 / 2015):
3. CRM Deployment (Online / On-Premise):
4. CRM Active Users Count:

Once you receive the license code then kindly follow the below steps to activate the add-on:

1. Browse to Settings>>Solutions and double-click the add-on solution file.
2. Open “License” tab
3. Click “Edit” button
4. Paste the license code in “Manual Activation” section
5. Click “Save” button.

2.8 Setting up Email to Case functionality

Step 1: Creating Queue: Create a Queue in CRM and configure it with email alias of your support mailbox. This will ensure that all emails received on this mailbox are automatically converted to an email activity in CRM and collected in this Queue. Please refer Appendix – III: Creating and configuring a Queue for incoming emails.

Step 2: Creating EmailtoCase configuration record for this Queue:

1. Browse to Settings➔Extensions➔E2CA and click New from the top ribbon:

In the *New* form specify the values (Refer to the table below)…Click Save

Field	Description	Remarks
Support Queue	Select the Queue which has been configured with the alias email id of mailbox whose emails need to be converted to Case **Please note that inbound email needs to have the alias email present in the TO or CC field.	Multiple Queues can be configured for Email to Case functionality.
Owner	This would most likely be the administrator	
Description	Multi-line text for user reference	
Exclusion Criteria		
Domain	Enter semicolon separated domains that need to be excluded. Eg. gmail.com; domain.com;yahoo.com	
Email ID	Enter semicolon separated email ids. Eg. xyz@iotap.com;abcdef@gmail.com;test@hotmail.com	
Subject	Enter semicolon separated keywords that need to be checked for subject line of incoming emails. Email-subject matching these keywords would not be converted to case. Eg Undeliverable;Delivery Failure;No Reply;Out Of Office;spam	This is to prevent creation of case for spam and auto-reply emails.
Email Loop Protection (Count: X) Email Loop Protection (Minutes: Y)	If an email is received from same email id and having same subject line in comparison to any existing emails (X) which have been received in last (Y) minutes then new case will not be created. (Please note that this functionality may not work precisely by the count and time due to the async behavior of CRM background processes)	This is for prevention of infinite case creation when the recipient party also has an email to case set-up
Ignore emails older than X hours	If time-difference of Email Received and CRM time is greater than X hours then it will be excluded	Sometimes we need to restart the email router. If there are some cases that were deleted earlier but the corresponding emails in mailbox were not then restart of router will result in recreation of cases.
Ignore email received in CC	If checked then emails having support alias in CC list will be excluded.	

Field	Description	Remarks
Case Creation **1		
Case Title Prefix	Text. Eg. [Auto-Created]	New case created could be pre-fixed by this text.
Case Subject	Select default subject for the newly created case	
Case Type	Select default case type for the newly created case	
Case Origin	Select a default origin for the newly created case	
Assign Queue	Please select a Queue in which the newly created case would be added	If left blank then the newly created case will not be added to any queue
Update Responsible Contact	E2CA tries matching email id of sender with Contact E-mail, E-mail Address 2, E-mail Address 3 and assigns this Contact to "Responsible Contact" field	This field is quite useful when we need to send a *case resolution* email to customer using a workflow.
Link New Cases to	Following options are available: 1. Contact – E2CA tries matching email id of sender with Contact E-mail, E-mail Address 2, E-mail Address 3 2. Account (Search Account)– E2CA tries matching email id of sender with Account E-mail, E-mail Address 2, E-mail Address 3 3. Account (Search Contact) – E2CA tries matching email id of sender with Contact but links with the Account (Primary Customer set for Contact) 4. Contact & Account 5. Account & Contact	Option 4 gives priority to Contact record when searching email id field and then if no match found proceeds searching with Account record.
No Customer Identified	Following options are available: 1. Do not create case 2. Link to Dummy Account 3. Link to Dummy Contact	
Dummy Contact	Select a default Contact that the case could be linked to.	
Dummy Account	Select a default Account that the case could be linked to.	
Attachments	A. Copy to Case B. Copy to Case & Remove from email	
Attachment size < X KB	any attachment less than X KB will not be copied in to the case	Will be applicable only when Attachment option is selected as "Copy to Case" or "Copy to Case & Remove from Email".
Attachment size > X KB	any attachment greater than X KB will not be copied in to the case	

Field	Description	Remarks
Case Owner Assignment		
Case Owner (Default)	User, Team, Team-Round Robin**2	Round Robin algorithm will not work in CRM Online.
Case Owning User (Default)	Please select a CRM User	
Case Owning Team (Default)	Please select a CRM Team	
Case Owner (Override)	(A) User – Account / Contact Owner**3 (B) User – Account / Contact Custom**4	
Contact (Override)	To be selected if option (B) selected above	
Account (Override)		
Case Linking		
Existing Case Check	Following options are available: 1. Do not check (Use CRM Smart Matching or Tracking Token) 2. Do not check – Create New Case always 3. Search for Case Number in all open cases (Case number needs to be present in email subject) 4. Search for Case Number in all open as well as closed cases (Case number needs to be present in email subject) *	For option 1 ensure that CRM Smart Matching is activated. If Option 3 is selected then E2CA add-on uses its built-in algorithm to search the case number in email subject For option 4, please enter hrs in re-open case closed field.
	Re-open case closed: X hrs. (For option 4 only*) By default value is 0. 0 means case will always be re-opened… otherwise enter number of hrs. within which if email received regarding closed case then it will be re-opened. If time difference is more than X hrs then new case will be created)	
Email Notification Templates		
New Case Creation: External Email Template	Select the email template for sending external notification for new case creation	An automatic email could be sent to the email sender with new case number. **5, **6
New Case Creation: Internal Email Template	Select the email template for sending internal notification for new case creation	**5, **6 An email is sent to the Case Owner by default…if "Internal Email Template" is selected.
New Communication regarding existing case: Internal Email Template	Select the email template for sending internal notification for new communication regarding existing case.	**5, **6 An email is sent to the Case Owner by default…if "Internal Email Template" is selected.

Field	Description	Remarks
External Email Notification – Sent to email sender (on new case creation)		
CC Case Owner	Case Owner email will be added in CC section of email notification	If Case Owner is a team then no email id will be added to CC.
CC Other	Semicolon separated list of email id's that needs to be added in CC section	
Internal Email Notifications		
Additional Recipients		
To		These are the additional email recipients for internal email notification
CC		
BCC		
Notify Case Owner		
Send New Case Internal Notifications	If Internal notification is needed for additional recipients then check this.	
Send Existing Case Internal Notifications	If Internal notification is needed for additional recipients then check this.	
Notify Excluded Case	To receive notifications for Emails that have been excluded because of an exclusion criteria	

**1: Please note that during automated case creation: Email Subject is copied to Case Title field and Email Body is copied to Case Description field.

**2: Team – Round-Robin: The members of the team will be assigned the owner of newly created cases in a round-robin fashion. Please note that this algorithm does not work in CRM Online.

**3: Case Owner – Assignment - User – Account / Contact Owner: The owner of the Contact or Account that was linked to this case will become the owner of the new Case. This will override the default CRM user or team that was selected.

**4: Case Owner – Assignment - User – Account / Contact Custom: The CRM User selected in the field (eg. Preferred User) of Contact or Account will become the owner of the new case. This will override the default CRM user or team that was selected.

**5: The solution comes with 3 sample email templates:

- IOTAP Sample – External Notification – New Case Creation
- IOTAP Sample – Internal Notification – New Case Creation
- IOTAP Sample – Internal Notification – New Communication regarding existing Case

**6: To add direct link to CRM email activity or case record in email template use keywords [EMAIL_URL] and [CASE_URL] respectively. Please note that these keywords will work only when added to an email template which is used for internal notifications.

2.9 New emails received regarding existing case

On import of Email to Case Automation add-on, a new field (checkbox) is added to Case entity called as "New mail received" {schema name: iotap_newmailreceived}.

This field is set whenever any email is received for a Case (for both new and existing Case).

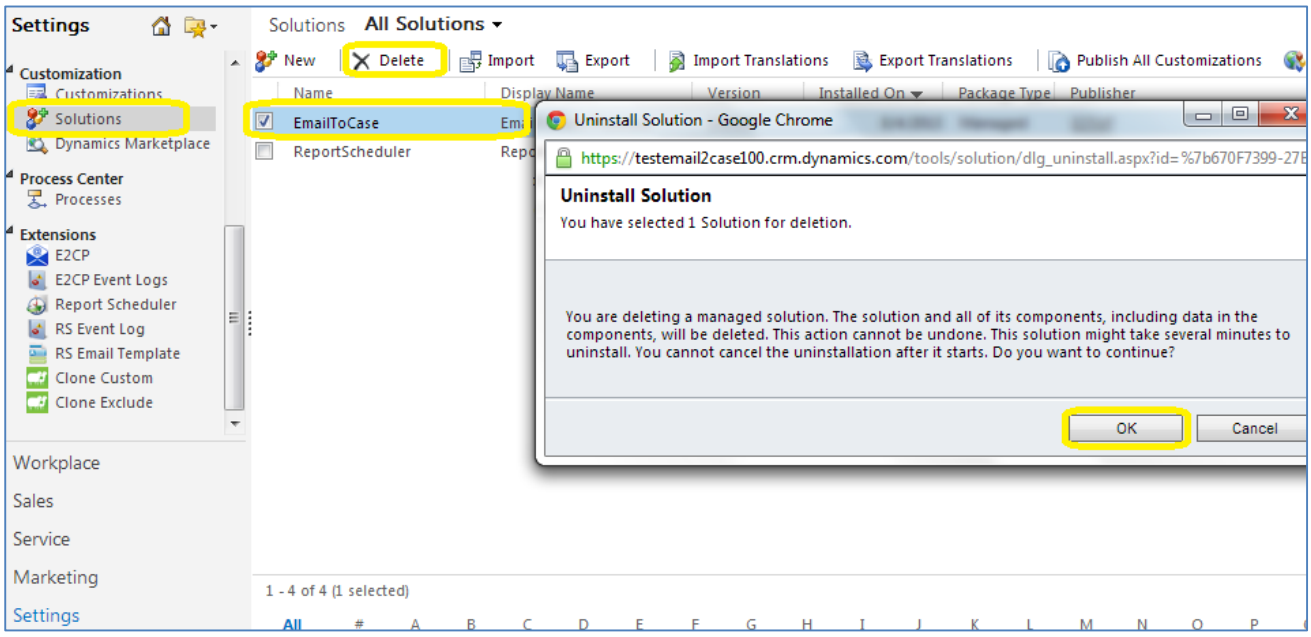
If you would like to use this field then please add this to your Case form. You can create a view based on "New mail received" field… which will display cases which have received new communication.

2.10 Upgrading to a higher version of the add-on

In order to upgrade to a higher version of the add-on, please uninstall the current email2case solution. Kindly note that the existing email2case configuration settings will get deleted when the solution is uninstalled.

2.11 Uninstallation process

To uninstall Email to Case Automation add-on, navigate to Settings→Customization→Solutions. Select "EmailToCase" and click "Delete" as shown below:



2.12 EULA - END-USER LICENSE AGREEMENT FOR Email to Case Automation Add-on

IMPORTANT PLEASE READ THE TERMS AND CONDITIONS OF THIS LICENSE AGREEMENT CAREFULLY BEFORE CONTINUING WITH THIS PROGRAM INSTALL: This IOTAP End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) and IOTAP for the software product identified above which includes associated software components, media, printed materials, and "online" or electronic documentation.

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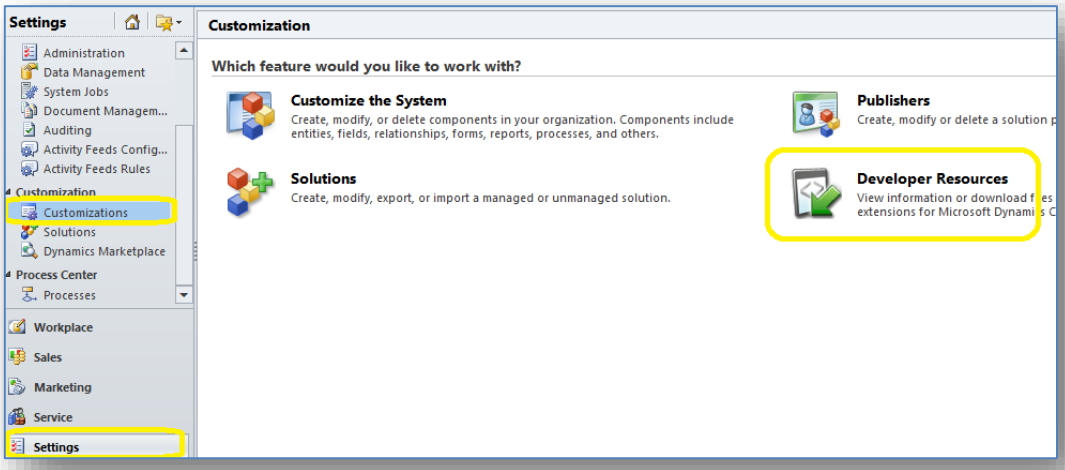
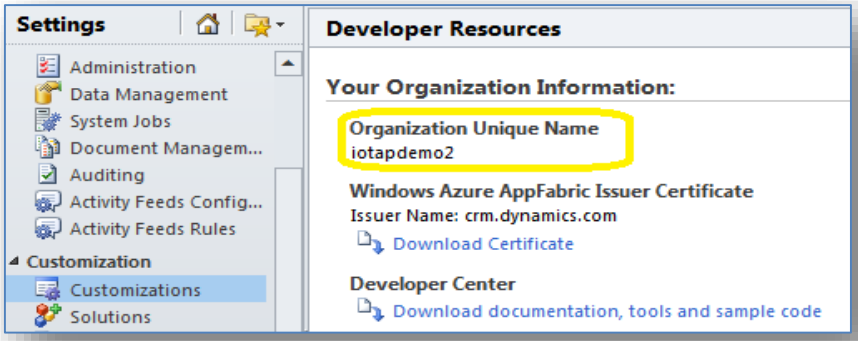
Limitation of Liability

In no event shall IOTAP be liable for any damages (including, without limitation, lost profits, business interruption, or lost information) rising from the use of the program or accompanying documentation. You acknowledge that the license fee reflects this allocation of risk.

2.13 Appendix - I: Getting Unique Organization Name:

In-order to access the Unique Organization name, please navigate to:
Settings→ Customizations→ Developer Resources



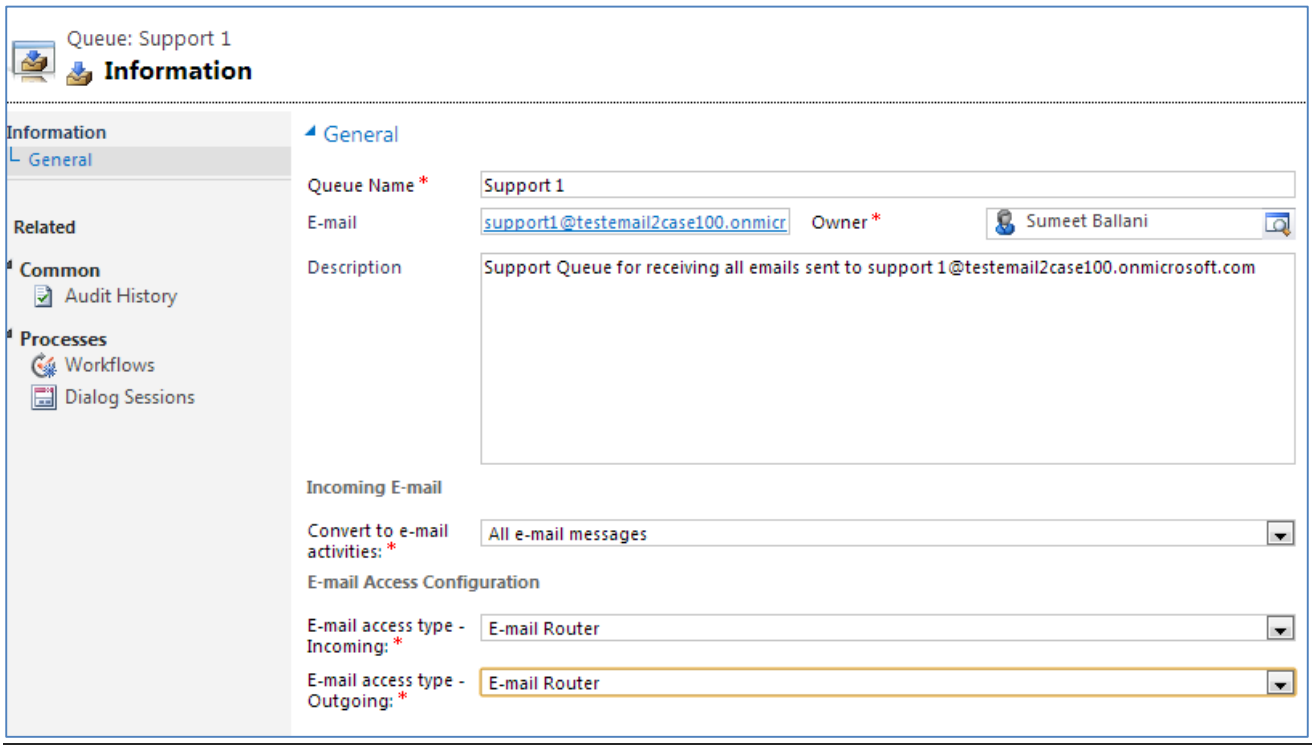


In the above example, the Unique Organization name is: **iotapdemo2**

2.14 Appendix - II: Creating and configuring a Queue in CRM for incoming & outgoing emails

To create a new Queue in CRM:

Browse to Settings➔Business Management➔Queues: Click New



Email: This is the email alias for your support or sales mailbox. All emails received in this mailbox will be created in CRM as an email activity and added to this Queue (provided "All Email Messages" is selected in Convert to e-mail activities drop-down).

E-mail access type – Incoming: If the option is selected as: Email Router then the router will poll the mailbox regularly to fetch new emails and move them to CRM.*

E-mail access type – Outgoing: If you would like an Auto-Response or notification emails to be sent from the Support mailbox then please select "Email Router" option from the dropdown.*

* Email Router Settings: Please create an incoming and outgoing profile in the Email router for the email alias used.

2.15 Appendix - III: Email to Case Maintainance: Creating Bulk Delete jobs

Maintenance involves deleting ***event log*** records created by Email to Case Automation add-on on regular basis. This can be done by creating *Bulk Delete* jobs from Settings➔Data Management section of CRM.

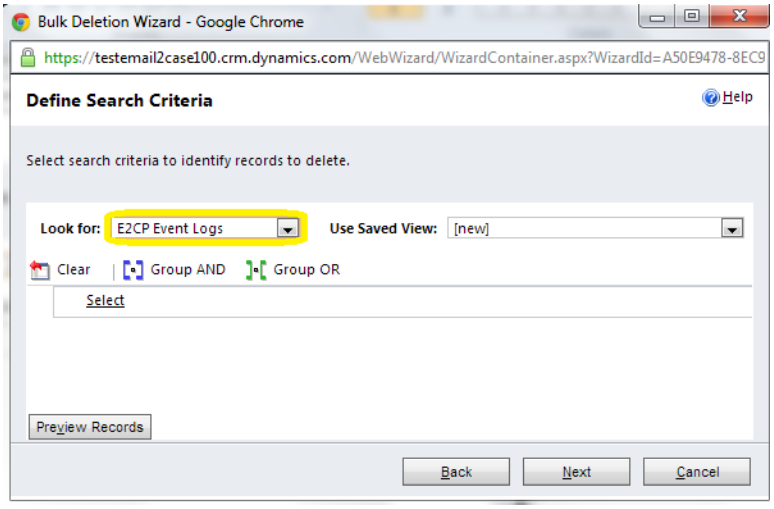
Bulk Deleting Emails

Sample Example: Creating Bulk Deletion job which runs every 7-day and deletes the event log records created by Email to Case Automation add-on:

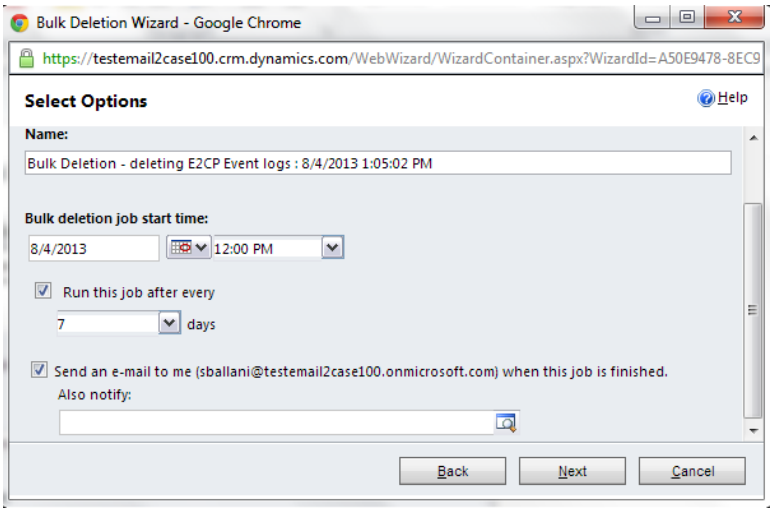
Go-to Settings➔Data Management and click "New":

Step 1: Start Bulk Deletion Wizard

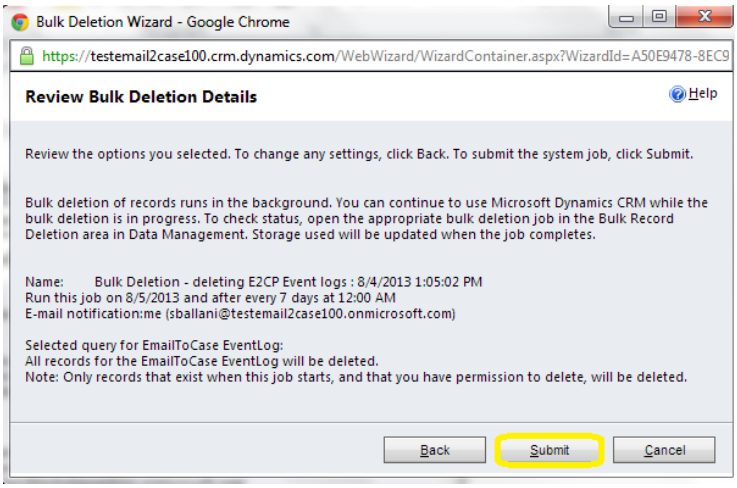
Step2: Define Search Criteria



Step 3: Select Bulk Deletion Options:



Step 4: Submit Bulk deletion job



2.16 Appendix - IV: FAQ

Q1. Sometimes new cases are created for cases that have already been deleted.

Ans. The process of email to case is as follows:

- Email router pushes emails from mailbox to CRM as an email activity.
- EmailToCase functionality then runs automatically and creates a new case based on the configured settings.

However if the CRM administrator has deleted the email activity and the router has been restarted then the whole process repeats again. The router will again fetch the emails from mailbox and since no corresponding email activity exists in CRM…a new email activity will be created. This will result in EmailToCase functionality creating a new Case.

In-order to stop the recreation of the case: please ensure that if an email activity is deleted from CRM then the corresponding mail is also deleted from the mailbox.

11710 Plaza America Dr. Suite 2000, Reston, VA 20190, USA

Phone: +1-703-884-3363 Email : sales@iotap.com Website: www.iotap.com