



## **c360 EmailToCase Installation and Configuration Guide**

EmailToCase Version 1.2.2 – Microsoft CRM 1.2 Compatible

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## Overview and Notes

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### Overview

c360 Solutions Email to Case component is a Windows Service that monitors one or more Microsoft CRM queues converting inbound e-mails into Service Cases. EmailToCase instantly allows Microsoft CRM users to implement e-mail based service or support without burdening service representatives with additional data entry.

### Microsoft CRM Compatibility

c360 EmailToCase version 1.2.2 is compatible with Microsoft CRM version 1.2. EmailToCase version 1.2.2 is the first release of EmailToCase for Microsoft CRM.

### EmailToCase process flow

EmailToCase monitors an unlimited number of Microsoft CRMEmailEnabled queues creating Case records and linking the e-mail activities to those Case records. The process flow of EmailToCase is:

- Customer sends e-mail to queue alias (e.g. [support@domain.com](mailto:support@domain.com))
- Microsoft CRM connector receives e-mail and creates CRM e-mail activity
- CRM e-mail activity is placed in the CRM queue as a queue item
- EmailToCase service runs on a scheduled interval and uses administrator set parameters to create a new Case based on the new CRM e-mail activity
- EmailToCase links CRM e-mail Activity to the newly created Case and deletes the queue item
  - o Case is linked to either the e-mail senders Contact or Account record based on an administrator set option
  - o Cases based on e-mails from unresolved senders are linked to a default Contact or Account
- Newly created Case is placed in the queue to which the e-mail was sent
- Customer is notified by a CRM email activity that a new Case has been created
- One or more designated recipients are notified by e-mail that a new Case has been created. This e-mail notification includes a link to directly open the newly created Case



# Installation Instructions

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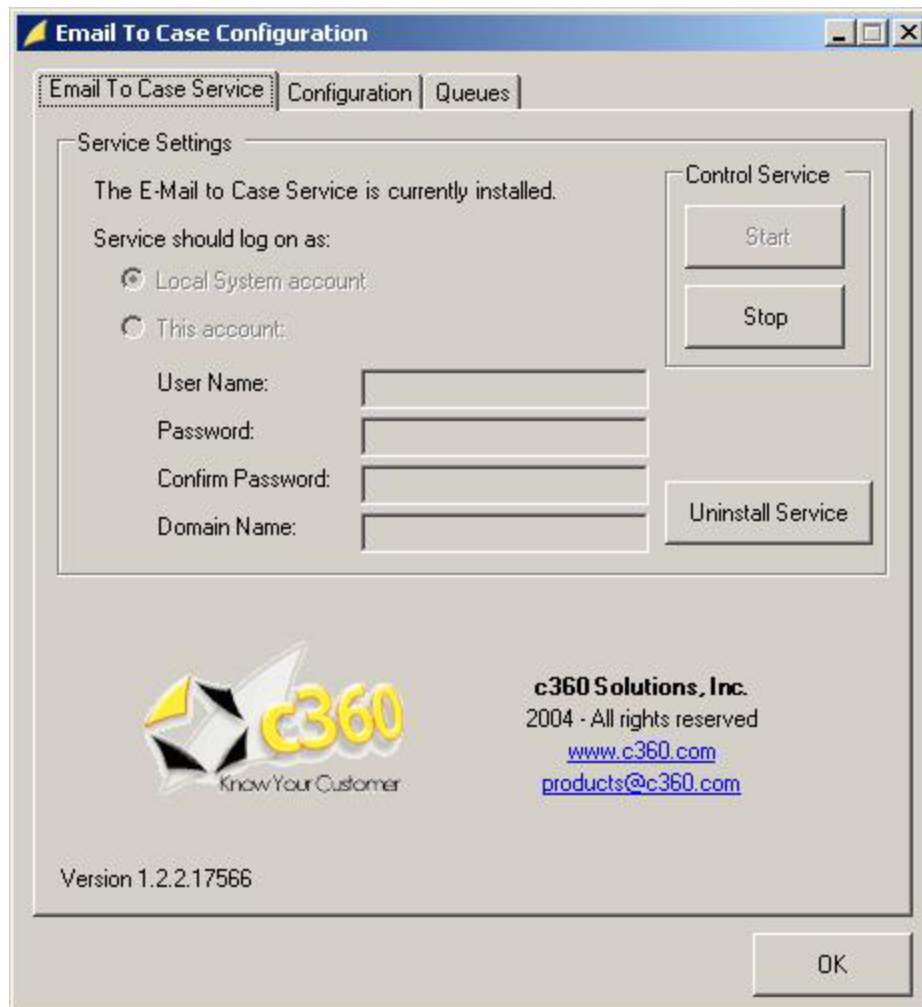
## Installation Instructions

Follow these steps to install EmailToCase:

1. Extract the c360.EmailToCase(MSCRMv1.2).zip file on the computer where you would like the EmailToCase service to run. This may be any server that is on the same domain as the Microsoft CRM server.
2. On the server where you want EmailToCase to reside create a folder to house the EmailToCase application and related files. c360 suggests that you install EmailToCase at a directory named C:\Program Files\c360\EmailToCase. This directory must be created manually. Once the directory has been created, copy the extracted EmailToCase files to it.
3. Installing a production license - EmailToCase ships with an unlimited use license for the 6 user Adventure Works Cycle sample database. If you have purchased EmailToCase and received a permanent production license file copy this file to the \Licenses directory in your installation.

EmailToCase licensing is based on the number of assigned Microsoft CRM licenses in your installation. If the number of assigned Microsoft CRM licenses exceeds the number of EmailToCase licenses your administrator (as configured later in this guide) will receive an email informing him or her that emails are no longer being converted into Cases. In this scenario, you can contact c360 at [Products@c360.com](mailto:Products@c360.com) to acquire more licenses. Once the necessary licenses have been acquired the service will then create Cases for any emails that were in the queue at the time the licensing discrepancy was reported.

4. Double click the file named c360.EmailToCase.exe. The application interface will open and you can then click the 'Install Service' button to install the EmailToCase service. See figure 1.



**Figure 1:** Configuring service settings with the EmailToCase Service screen

5. Once the EmailToCase service has completed the installation you may begin configuring queues. To configure queues refer to the section of this document titled 'Configuring CRMEmailEnabled queues for use with EmailToCase.'
6. Once you have configured your queues you may start the service. On the EmailToCase Service screen, illustrated in figure 1, specify the account under which you would like the service to run then click the 'Start' button to start the service.
  - a. Note: you may make configuration changes while the EmailToCase service is running but your changes will not take effect until the service is stopped and restarted.



### **Removal Instructions**

Follow these steps to install EmailToCase:

1. Double click the c360.EmailToCase.exe icon to start the EmailToCase configuration interface.
2. On the EmailToCase Service screen click the uninstall service button
3. Remove the EmailToCase directory from its installation location

### **Upgrade Instructions**

Follow these steps to upgrade EmailToCase from version 1.2.1 to 1.2.2:

1. Double click the c360.EmailToCase.exe icon to start the EmailToCase configuration interface and click the stop button to stop the service.
2. Close the EmailToCase configuration interface.
3. Extract the new c360.EmailToCase.exe file over the existing file.
4. Double click the c360.EmailToCase.exe icon and configure new features if desired.
5. Click on the Start button to restart the EmailToCase service.



## Configuring CRMEmailEnabled Queues for use with EmailToCase

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### How EmailToCase works

c360 EmailToCase is a Windows service that monitors CRMEmailEnabled queues in Microsoft CRM, taking email activities from those queues and creating Case records from them. Because EmailToCase is monitoring Microsoft CRM queues, those queues must already be set up to convert inbound emails into Microsoft CRM email activities. For detailed instructions on how to configure a Microsoft CRM queue to convert inbound email to CRM email activities see Microsoft Business Solutions Techknowledge article 30150. For reference, article 30150 has been included as appendix A of this document.

**Note:** CRMEmailEnabled queues will only convert emails into activities if those emails pass through the Microsoft CRM Exchange Queue service. Emails from Exchange users on the same domain as Microsoft CRM will not be converted into CRM email activities because they never pass through the Microsoft CRM Exchange Queue service. Outside emails as well as emails from POP users on the Microsoft CRM domain will be converted to CRM email activities.

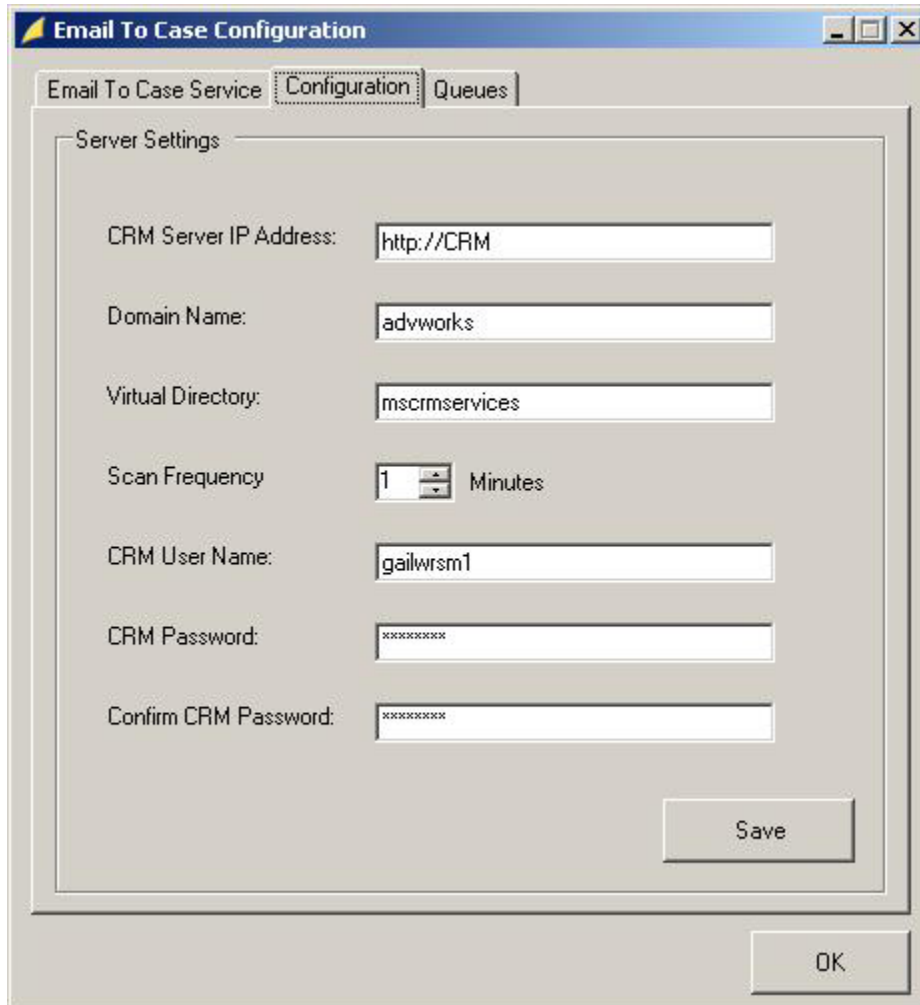
### Configuring a CRMEmailEnabled queue to work with EmailToCase

Once you have CRMEmailEnabled up one or more Microsoft CRM queues so that they are successfully converting emails into CRM email activities you are ready to configure those queues so they will turn CRM email activities into Service Cases in Microsoft CRM.

The following steps outline how to configure EmailToCase to work with a CRMEmailEnabled Microsoft CRM queue.

1. Test your Microsoft CRM queue to ensure that emails sent to it are being turned into CRM email activities. If emails sent to the queue are not showing up as CRM email activities, refer to Appendix A to see Microsoft's article on enabling a CRM queue to receive email. Please note that c360 does not provide support for CRMEmailEnabling Microsoft CRM queues.
2. Create a CRM user. This is the user through which EmailToCase scans the CRM queues and creates Cases. This can be an existing CRM user or one created exclusively for EmailToCase. The CRM user through which Email to Case operates must have a CRM suite or service license and a security role with the following privileges:
  - a. Activity – Create, Read, Write (Global)
  - b. Queue – Read (Global)
  - c. Case – Create, Read, Write, Append, Append To, Assign (Global)

3. Double click the c360.EmailToCase.exe icon to start the EmailToCase configuration interface. Select the Configuration tab as illustrated in figure 2. Before configuring individual queues, the settings on this tab must be provided.



The screenshot shows the 'Email To Case Configuration' dialog box with the 'Configuration' tab selected. The 'Server Settings' section contains the following fields and values:

| Field                  | Value         |
|------------------------|---------------|
| CRM Server IP Address: | http://CRM    |
| Domain Name:           | advworks      |
| Virtual Directory:     | mscrmservices |
| Scan Frequency:        | 1 Minutes     |
| CRM User Name:         | gailwsm1      |
| CRM Password:          | XXXXXXXXXX    |
| Confirm CRM Password:  | XXXXXXXXXX    |

Buttons: Save, OK

**Figure 2:** Configuring EmailToCase settings



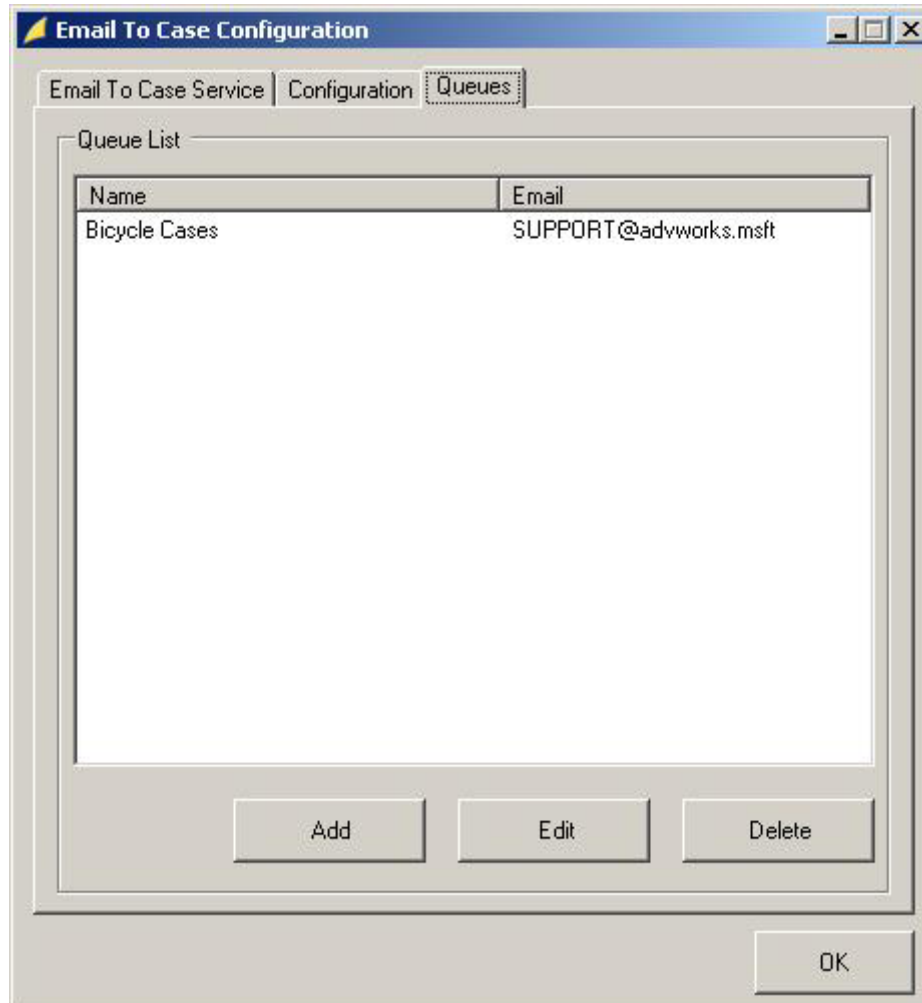


4. Provide a valid value for each EmailToCase setting. The following table provides an overview and example of each EmailToCase setting.

| Setting              | Description  | Example                    |
|----------------------|--|----------------------------|
| CRM Server Address   | The machine name of the CRM server   | http://awcserver01         |
| Domain Name          | The domain on which CRM is installed   | awc                        |
| Virtual Directory    | The virtual directory where the CRM web services reside. By default this will be msccrm/services | msccrm/services            |
| Scan Frequency       | The frequency in minutes with which EmailToCase inspects the CRM queues                          | 1                          |
| CRM User Name        | The CRM that user EmailToCase uses to scan the queues and create Cases                           | john.gravelly              |
| CRM Password         | The password for the CRM user  | <i>Enter password here</i> |
| Confirm CRM Password | Repeat the password for the CRM user   | <i>Enter password here</i> |

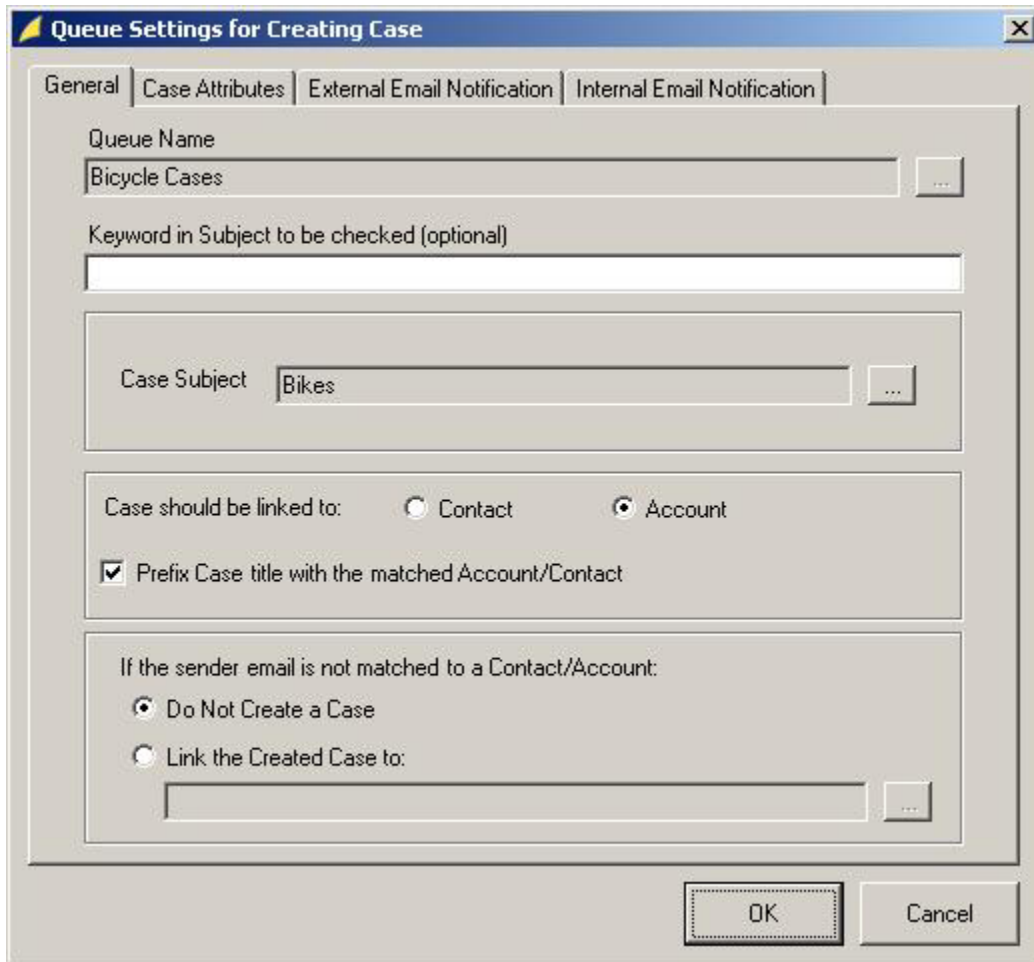
5. Once the EmailToCase settings have been entered click the Save button to save them. These settings are saved to the c360.EmailToCase.config file. Please do not edit this file directly.

6. Select the Queues tab to begin configuring individual CRM queues. Figure 3 lists the queues tab. Click the 'Add' button to configure a CRM queue to work with EmailToCase.



**Figure 3:** Configuring Microsoft CRM queues to work with EmailToCase

7. Select the Queues tab to begin configuring individual CRM queues. Figure 3 lists the queues tab. Click the 'Add' button to configure a CRM queue to work with EmailToCase. When the 'Add' button is selected the Queue Settings screen, illustrated in figure 4, is displayed.



The image shows a Windows-style dialog box titled "Queue Settings for Creating Case". It has four tabs: "General", "Case Attributes", "External Email Notification", and "Internal Email Notification". The "General" tab is selected. Inside the dialog, there are several input fields and options:

- Queue Name:** A text box containing "Bicycle Cases" with a browse button (three dots) to its right.
- Keyword in Subject to be checked (optional):** An empty text box.
- Case Subject:** A text box containing "Bikes" with a browse button (three dots) to its right.
- Case should be linked to:** Two radio buttons, "Contact" and "Account". The "Account" radio button is selected.
- Prefix Case title with the matched Account/Contact:** A checked checkbox.
- If the sender email is not matched to a Contact/Account:** Two radio buttons, "Do Not Create a Case" and "Link the Created Case to:". The "Do Not Create a Case" radio button is selected.
- Link the Created Case to:** An empty text box with a browse button (three dots) to its right.

At the bottom right of the dialog are two buttons: "OK" and "Cancel".

**Figure 4:** The Queue Settings screen

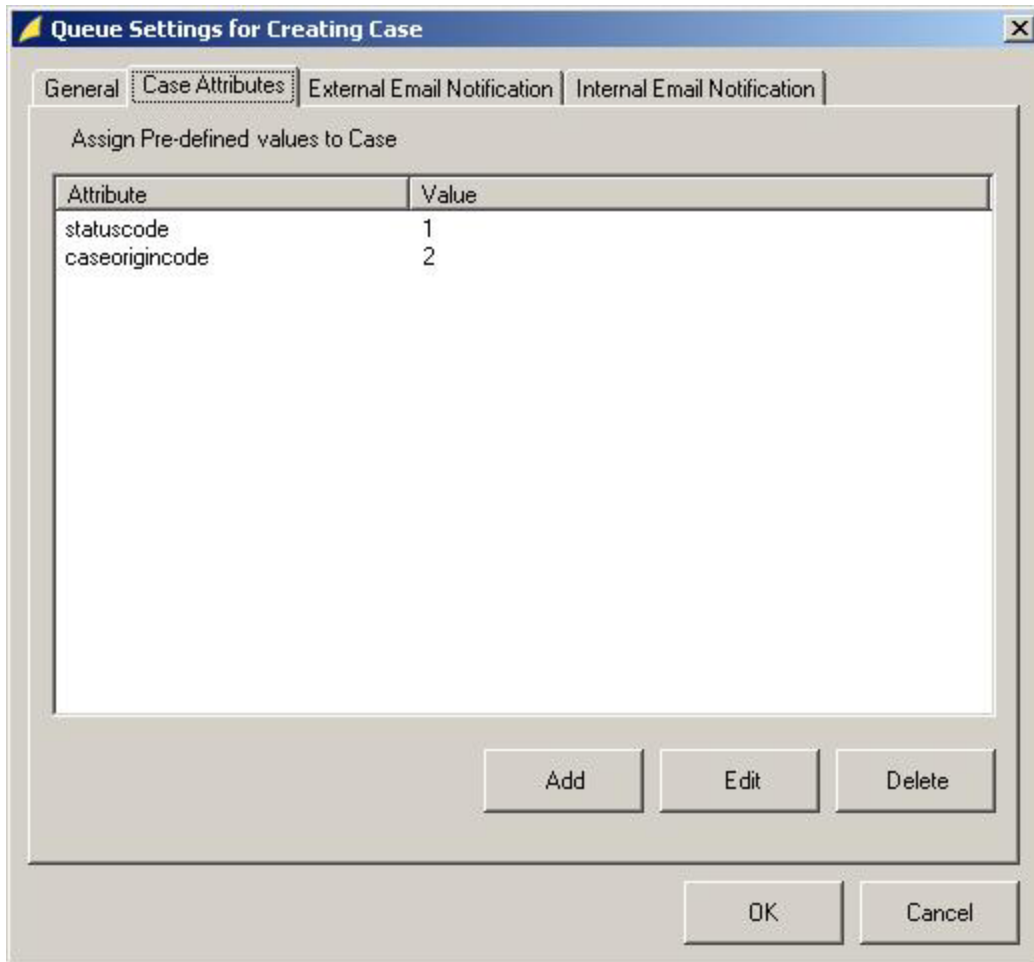


8. Complete the fields on the Queue settings screen. The table below lists and describes the Queue Settings fields.

| Field  | Description   |
|--|---|
| Queue Name   | The Microsoft CRM queue for which you want Cases to be created from emails. This queue must be CRMEmailEnabled.   |
| Keyword in Subject to be checked (optional)        | A keyword that EmailToCase will check for prior to creating a Case. For example, you may want customers to have to include the word 'Case' in the subject line in order for the email to become a case. You may choose to require a keyword as a filtering mechanism so that unwanted emails do not become Cases. |
| Case Subject                                       | In Microsoft CRM the subject field is required by default on Cases. This field allows you to select which Subject will be added to the newly created Case. If you have removed the requirement on Case Subject you will not need to select a value here.  |
| Case Should be linked to:                          | This field tells EmailToCase whether to link the newly created Case to a Contact or Account record. This depends on your organization's business model and how you use CRM. Cases are 'linked' to contact or account records through the Customer field on the Case.  |
| Prefix Case title...                               | Selecting this checkbox adds the Account or Contact name (based on the 'linked to:' setting) to the title of the created case.  |
| If the Sender is not matched to a Contact/Account: | In situations where an email is received from an email address that is not found in the Microsoft CRM Contact or Account tables, Either do not create a case for the email - Or - Link the Case created by EmailToCase to the entity selected here.   |

9. Select the Case Attributes tab and configure any case fields that you would like to be filled by default. For example, you may want to default the Case Origin field to 'Email'. Similarly, you may want to default the Status Reason field to 'In Progress.' To do this you will need to enter the field's schema name and picklist integer value on the Case attributes tab. Examples entries are included in the table below. Figure 5 shows the Case Attributes screen. For reference, Appendix B contains a table of all standard Case fields including their labels (in English), values and schema names.

| Field Label   | Attribute (this is the Microsoft CRM Schema Name for the field) | Value (this is the actual value that will be saved to the CRM database) |
|---------------|---|---|
| Case Origin   | caseorigincode  | 2   |
| Status Reason | statuscode  | 1   |



**Queue Settings for Creating Case**

General **Case Attributes** External Email Notification Internal Email Notification

Assign Pre-defined values to Case

| Attribute      | Value |
|----------------|-------|
| statuscode     | 1     |
| caseorigincode | 2     |

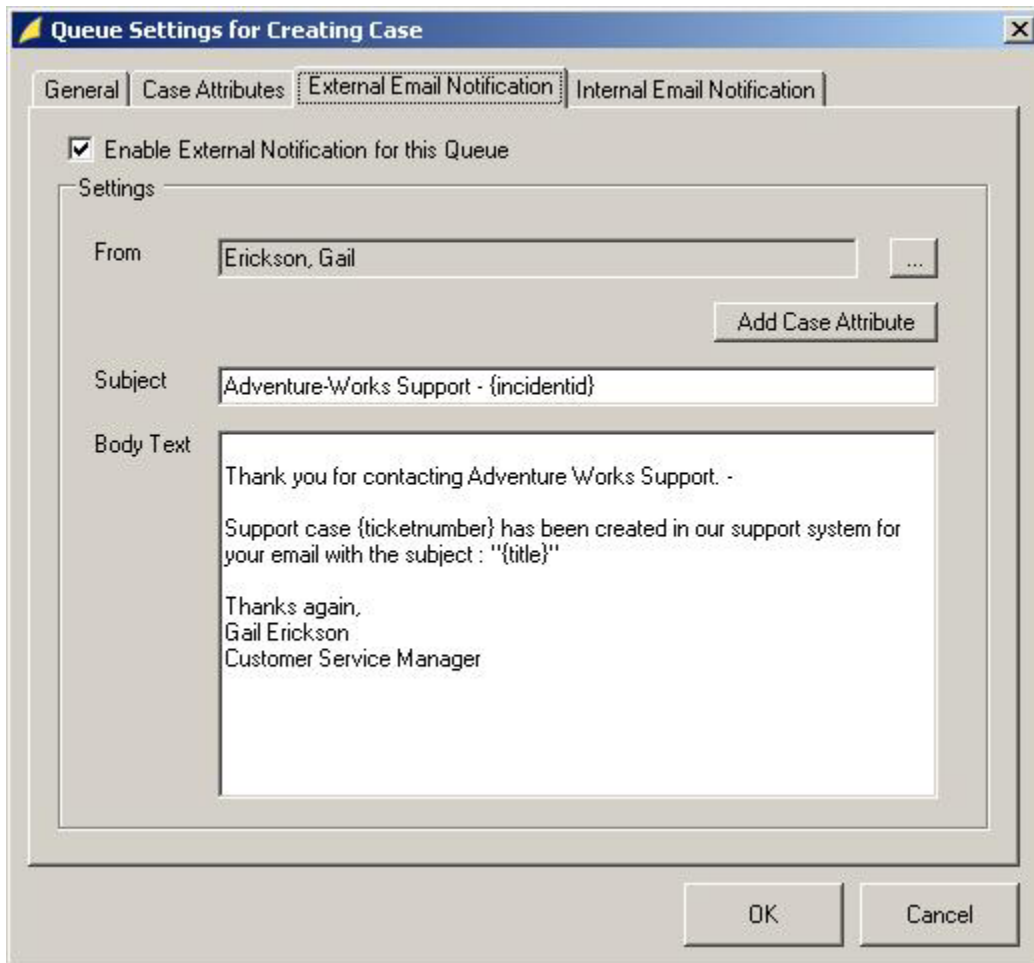
Add Edit Delete

OK Cancel

**Figure 5:** Configuring default values for Cases created by EmailToCase

10. Select the External Email Notification tab, pictured in Figure 6. If you would like an email to be sent to the person who submitted the email, select the "Enable External Notification for this Queue." - If you would rather use workflow to create the external email, unselect this option and configure the response in CRM.

If you have enabled external notification, you can then configure the responding address ("From") and the text of the email you would like sent to notify the original sender that a Case has been created. By using the 'Add Case Attributes' button you can incorporate information from the Case into the email that will be sent.



The screenshot shows a dialog box titled "Queue Settings for Creating Case" with four tabs: "General", "Case Attributes", "External Email Notification" (which is selected), and "Internal Email Notification".

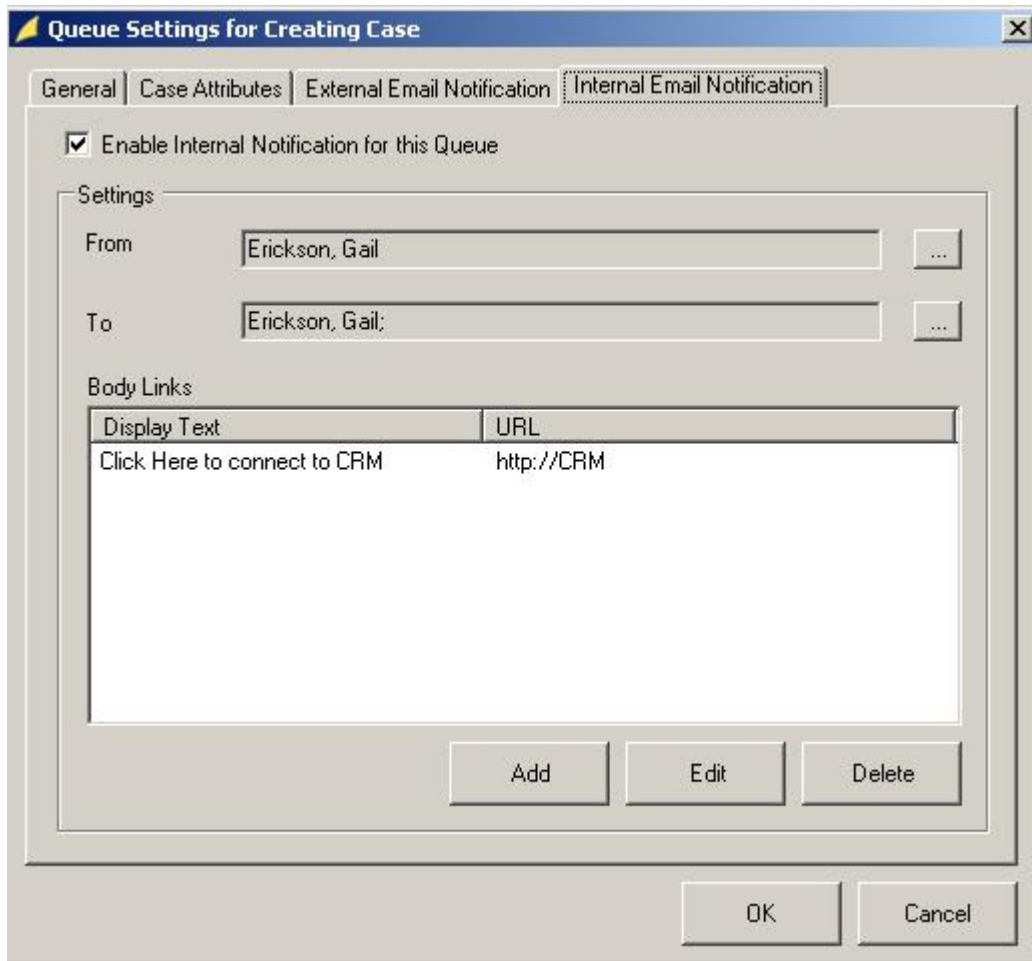
Under the "External Email Notification" tab, the checkbox "Enable External Notification for this Queue" is checked. Below this, there is a "Settings" section containing:

- A "From" field with the text "Erickson, Gail" and a button with three dots to its right.
- An "Add Case Attribute" button.
- A "Subject" field with the text "Adventure-Works Support - {incidentid}".
- A "Body Text" area containing the following text:  
Thank you for contacting Adventure Works Support. -  
Support case {ticketnumber} has been created in our support system for your email with the subject : "{title}"  
Thanks again,  
Gail Erickson  
Customer Service Manager

At the bottom of the dialog box are "OK" and "Cancel" buttons.

**Figure 6:** Configuring the external email notification to be sent when a Case has been created

11. Select the Internal Email Notification tab, pictured in Figure 7, and configure the text of the email you would like sent to notify a CRM user that a Case has been created. The email that will be sent will contain one or more links to the Case record. By using the 'Add' and 'Edit' buttons you can configure multiple links that can be used depending on how the user is connected to CRM when the email is received.



The dialog box is titled "Queue Settings for Creating Case". It has four tabs: "General", "Case Attributes", "External Email Notification", and "Internal Email Notification". The "Internal Email Notification" tab is selected. Inside the dialog, there is a checkbox labeled "Enable Internal Notification for this Queue" which is checked. Below this is a "Settings" section with two text boxes: "From" (containing "Erickson, Gail") and "To" (containing "Erickson, Gail:"). Below these is a "Body Links" section containing a table with two columns: "Display Text" and "URL". The table has one row with the text "Click Here to connect to CRM" and the URL "http://CRM". At the bottom of the dialog are three buttons: "Add", "Edit", and "Delete". At the very bottom are "OK" and "Cancel" buttons.

| Display Text                 | URL        |
|------------------------------|------------|
| Click Here to connect to CRM | http://CRM |

**Figure 7:** Configuring the internal email notification to be sent when a Case has been created



## **EmailToCase Object Resolution and Case Linking**

This section provides additional detail on how EmailToCase determines how to resolve addresses on inbound emails and how it links the resulting Cases to Contacts or Accounts.

When an email is sent to a Microsoft CRMEmailEnabled queue the Microsoft CRM Exchange Queue service (often referred to as the Exchange Connector) creates a CRM email activity from the email. The CRM activity is then put in the Microsoft CRM queue.

EmailToCase scans administrator specified Microsoft CRM queues at a set interval to see if the Microsoft CRM Exchange Queue service has put new email activities in them.

EmailToCase will search the ContactBase table to find a match for the sender email address on the CRM email. In doing this, EmailToCase searches the three email address fields (emailaddress1, emailaddress2, emailaddress3) on the Contact records. If it finds a match and the queue has been configured to link Cases to Contacts the newly created Case will be linked (via the Case's customerid field) to the matching Contact. If the queue has been configured to link Cases to Accounts, the newly created Case will be linked to the matching Contact's linked Account record. In this scenario if the matching Contact is not linked to an Account the Case will be linked to the default account that has been selected on the Queue Settings screen (Figure 4). Also in the scenario where the Case is to be linked to an Account and a matching email address has not been found in the ContactBase table the AccountBase table will be searched for a match. If a match is found, the Case will be linked to that Account.

In all scenarios, if a matching email address is not found the Case, based on the choices in the queue settings screen (see Figure 4) the email will either be left in the queue as an email (and not converted into a case), or it will be linked to the default Contact or Account as set on the Queue Settings screen.





## EmailToCase Files

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c360 EmailToCase includes the following files:

- **C:\Program Files\c360\EmailToCase\**
  - c360.EmailToCase.exe
  - c360.EmailToCase.config
  - Microsoft.CRM.Platform.Proxy.dll
  - **\Licenses**
    - c360.EmailToCase Version 1.lic

**Note:** The installation path listed here can be modified. EmailToCase can run in any directory on any .NET v1.1 Framework installed server in the CRM domain.



## Appendix A – Microsoft CRM TechKnowledge article 30150

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### How to create and configure a Queue and User that can receive incoming E-mail in Microsoft CRM

**Note:** c360 has provided this information as reference to customers in preparing their installation for our EmailToCase product. [c360 does not provide support for CRMEmailEnabling Microsoft CRM queues.](#) If you require support for CRMEmailEnabling a Microsoft CRM queue please contact Microsoft Business Solutions through PartnerSource or CustomerSource.

**Document ID:** 30150

**Date Created:** 4/10/2003

**Date Last Modified:** 2/25/2004

**Language:** English - United States

**Country:** USA

**Product:** Microsoft CRM

**Versions:** 1.0

**Modules:** Microsoft CRM Email, Microsoft CRM Installation, Microsoft CRM Server Administration, Microsoft CRM Service, Microsoft CRM Setup

### SUMMARY

This article describes how to create and configure a Queue and User Who can receive incoming e-mail in Microsoft CRM.

### MORE INFORMATION

#### Create a Queue User

Steps for creating and configuring a Queue User Who can receive incoming e-mail (for example, the e-mail address may be support@yourcompany.com).

1. Log on to the Exchange 2000 server (EXBE01) using an account that is a member of the Domain Administrators group.
2. Click Start, point to Programs, point to Microsoft Exchange, and then click Active Directory Users and Computers.
3. Click View, and then Advanced Features to enable viewing Advanced Features Property sheets.
4. In the Console Tree, double click the Domain Node.
5. In the Details pane, right-click the Container where you want to add the User, point to New, and then click User.
6. In First Name, type the Queue Name (for example, support).
7. In User Logon Name, type the Name that the User will log on with (support) and, from the drop-down list, click the UPN suffix that must be appended to the User Logon Name (following the @ sign). Click Next.
8. In Password and Confirm Password, type the User Password, select Account is Disabled, and then click Next.



9. Verify that the Create an Exchange Mailbox check box is selected, and then click Next.
10. Click Finish.
11. In the Console Tree, double-click the Container where you created the Queue User.
12. Right-click the Queue User in the Details pane and then click Properties.
13. On the Exchange Advanced Properties tab of the Disabled User Object that owns the Mailbox, click Mailbox Rights, and then search the list of accounts for one that has the Associated External Account permission.

**Note** By default, no account will have this permission; however, depending on how the account was created, it may already have this set. If another account currently has the Associated External Account permission, remove the Associated External Account permission from that account. Only one account at a time can have the Associated External Account permission. Therefore, to reset the permission, you must first remove this permission.

14. Grant the Associated External Account permission to the SELF account, and verify that Full Mailbox Access permission has been approved.

**Note** By default, the SELF account will already have Full Mailbox Access permissions if this is a Disabled account. The SELF account is available in all Microsoft Windows 2000 domains. All SELF accounts share a well-known Security Identifier (SID) that is the same across all domains. If the SELF account is not already listed in the Permissions dialog box, you can add it by typing SELF as the account name.

15. Click OK to close the Mailbox Rights dialog box. Note, after the Exchange 2000 DSAccess cache is refreshed (which may take some time), the new configurations will take effect and e-mail messages that are sent to the Disabled account will not generate errors.

16. Click the Exchange Advanced tab and then click Custom Attributes.
17. Select the first available extension Attribute. (On a new installation, the first one should be available.) Click Edit.
18. Type CRMEmailEnabled, click OK, click OK to close the Exchange Custom Attributes dialog box, and then click OK to close the User properties.
19. Start Microsoft Outlook with this User once to make sure the User Mailbox has been created.
20. Disable this account in Active Directory. If this is not completed, the Microsoft CRM Queue functionality will not work properly.

### **Add a Queue to the Microsoft CRM Server**

1. On the Microsoft CRM Server, start Internet Explorer and in the browser address box, type <http://localhost> to open Microsoft CRM.
2. On the Home page, go to Settings | Business Unit Settings | Queues.
3. Click New Queue.
4. Enter the Queue Name (for example, Support), the Business Unit, the Owner, and the E-mail (for example, support@adventure-works.com).



**Note** The documentation for creating and configuring a Queue is located in the Implementation Guide.

**Note** The Microsoft CRM Exchange E-Mail Router will process all e-mail that comes in from the Internet and will only process internal e-mail that is sent from a Microsoft CRM client. However, internal e-mail that is sent to a queue in Microsoft CRM, will not be created as a Microsoft CRM Activity; only external e-mail will create an Activity in a Microsoft CRM Queue.



## Appendix B – Default Microsoft CRM Case fields and values

The following table lists the default Microsoft CRM Case fields and values. The numbers in parentheses next to picklist values represent their integer values.

### Case Object Properties

| Field         | Const. | Type        | Field Values or Description  | Field Name/Notes         |
|---------------|--------|-------------|--|--------------------------|
| Case No.      | Sys.   | ID          | <i>Auto-generated and displayed in the record header</i>   | ticketnumber             |
| Owner         | Sys.   | Owner       |  | Ownerid                  |
| Status Reason | None   | Picklist    | Active – In Progress (1)<br>Active – On Hold (2)<br>Active – Waiting for Details (3)<br>Active – Researching (4)<br>Resolved – Problem Solved (5)<br>Canceled – Canceled (6) | Statuscode               |
| Customer      | Sys.   | Customer    | <i>Account and Contact Lookup</i>  | Customerid               |
| Title         | Req.   | String(200) | <i>n/a</i>   | Title                    |
| Subject       | Req.   | Lookup      |  | Subjectid                |
| Description   | None   | Memo        | <i>n/a</i>   | Description              |
| Contract      | None   | Lookup      |  | Contracted               |
| Contract Line | None   | Lookup      |  | Contractdetailid         |
| Product       | Req.   | Lookup      |  | Productid                |
| Serial Number | None   | String(100) |  | Productserialnumber      |
| Follow Up By  | None   | Date        |  | Followupby               |
| Service Level | None   | Picklist    | Gold (1)<br>Silver (2)<br>Bronze (3)   | Contractservicelevelcode |
| Case Origin   | None   | Picklist    | Phone (1)<br>E-mail (2)<br>Web (3)   | Caseorigincode           |
| Priority      | None   | Picklist    | High (1)<br>Normal (2)<br>Low (3)  | Prioritycode             |
| Satisfaction  | None   | Picklist    | Very Satisfied (1)<br>Satisfied (2)<br>Neutral (3)<br>Dissatisfied (4)<br>Very Dissatisfied (5)  | Customersatisfactioncode |
| Case Type     | None   | Picklist    | Question (1)<br>Problem (2)<br>Request (3)   | Casetypecode             |