



## **c360 Email To Case Installation and Configuration Guide**

Microsoft Dynamics CRM 3.0 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. Email To Case 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 Email To Case for Microsoft CRM 3.0 is compatible with Microsoft Dynamics CRM 3.0. For additional product information visit <http://www.c360.com/EmailToCase.aspx>

### Email To Case process flow

Email To Case monitors an unlimited number of Microsoft CRM 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
- Email To Case service runs on a scheduled interval and uses administrator set parameters to create a new Case based on the new CRM e-mail activity
- Email To Case links CRM e-mail Activity to the newly created Case and deletes the queue item
  - o Case is linked to the e-mail sender's Contact and/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 internal 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



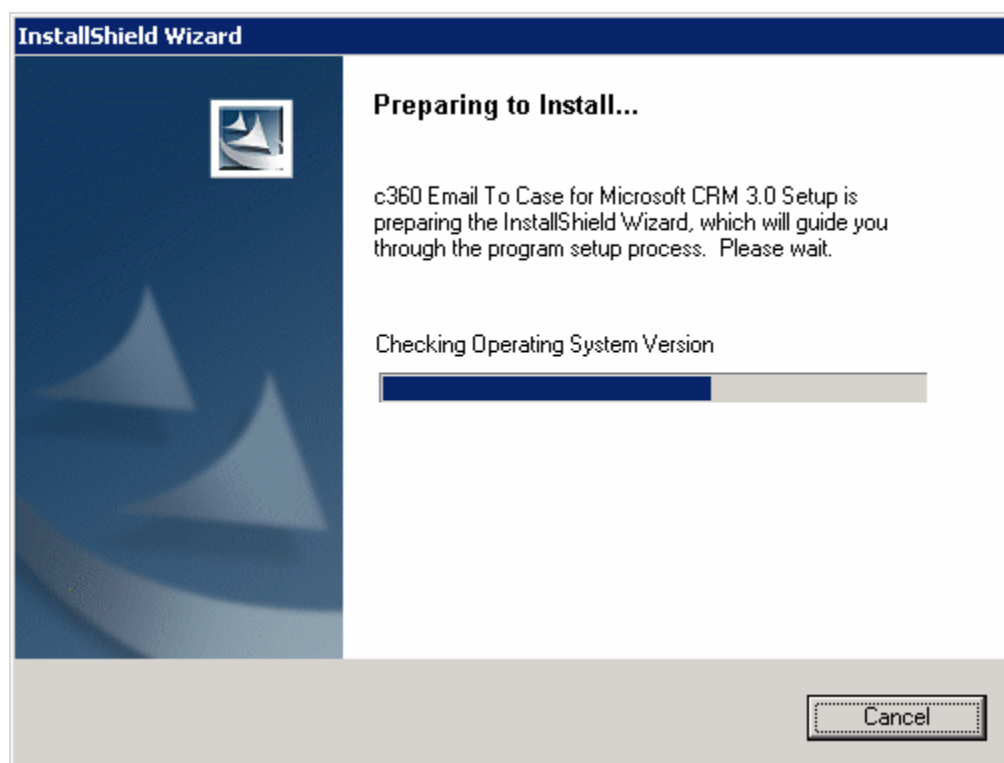
## Installation Instructions

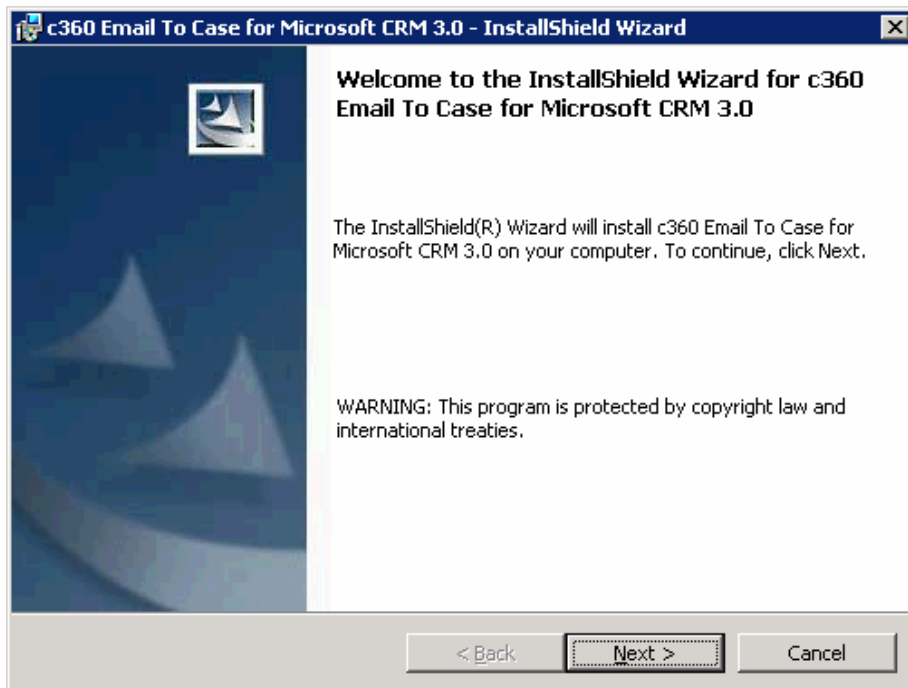
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To install the product the installation application must be run on the CRM server by a user with Domain Administrator privileges. The installation of c360 Email To Case for Microsoft Dynamics CRM 3.0 requires the c360.EmailToCase.exe file which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

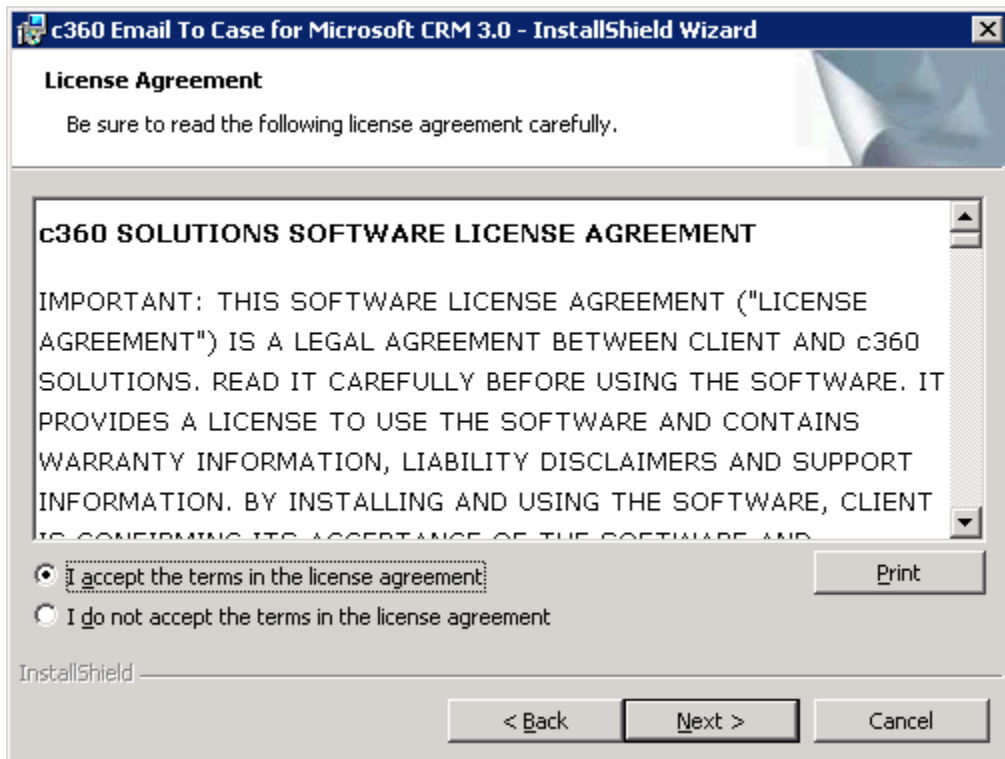
### Steps to install c360 Email To Case for Microsoft Dynamics CRM 3.0

1. Extract the c360.EmailToCase(MSCRMv3.0) into a folder on the Microsoft CRM server machine.
2. Double click the 'c360.EmailToCase.exe' file. You will see the following screens.

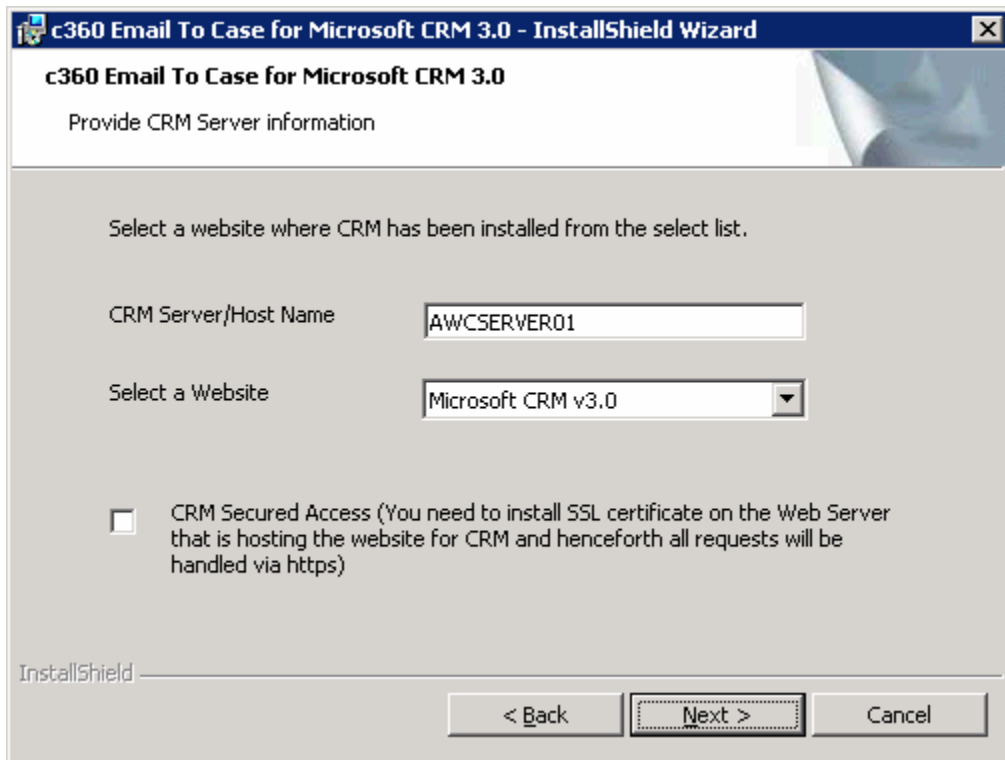




3. Click '**Next**' to begin the installation process.



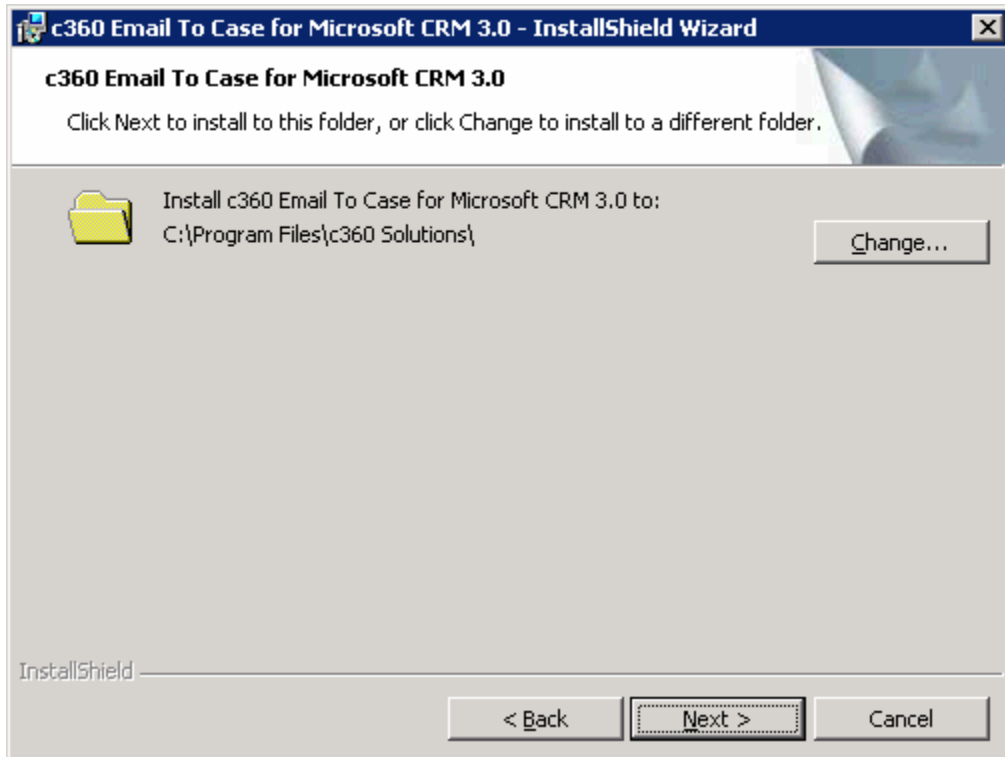
4. If you agree with the terms of the license agreement, select the option- 'I accept the terms in the license agreement' and click '**Next**'.



5. Check if the entries made in these fields by default are correct and click '**Next**'.

**Note:**

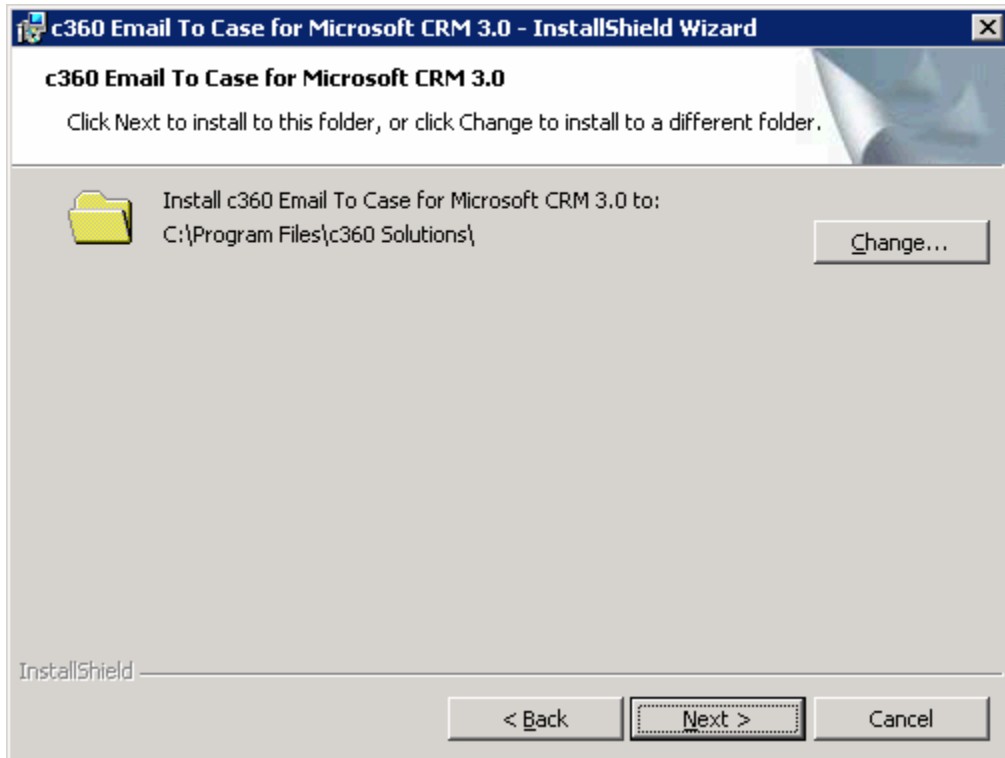
- CRM Server name: Name/ host header/ IP address of the server that is hosting the Microsoft CRM website.
- Website: Name of the Microsoft CRM website.
- Check CRM Secured Access option if it is a secure connection.



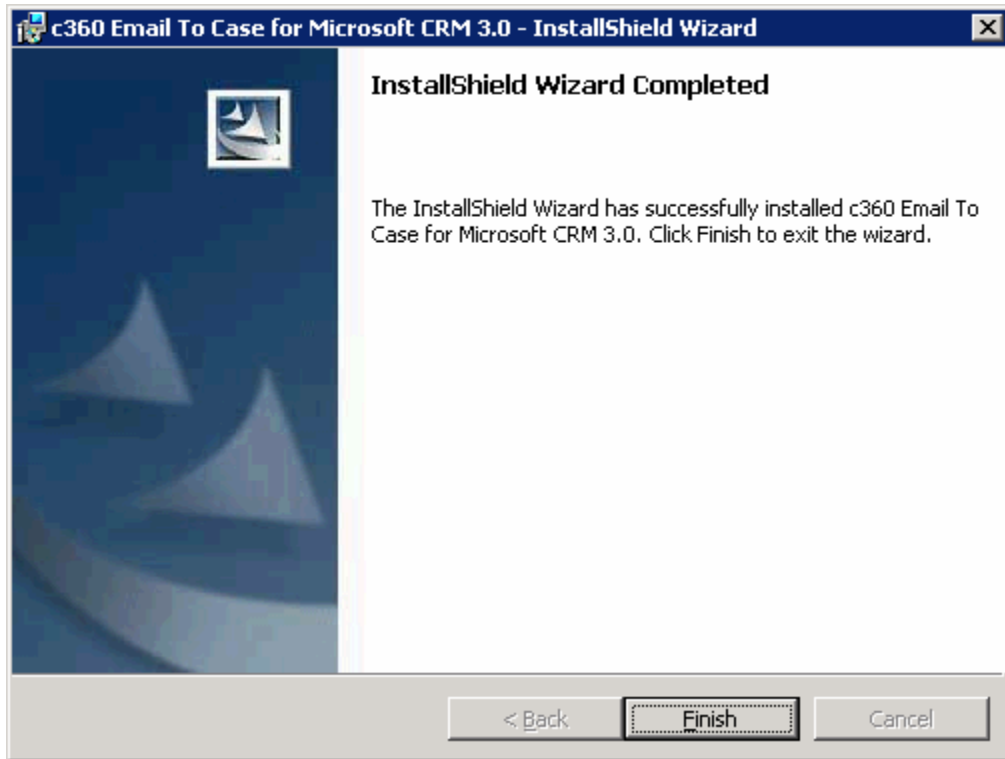
6. Click '**Next**' to install to the folder in the default directory  
**OR** Click '**Change**' and select the destination folder of your choice. Then click '**Next**'.

**Note:** This screen will not appear if c360 virtual directory already exists in the Microsoft CRM3.0 website.





7. Click '**Install**' to install c360 Multi-Field Search for Microsoft CRM 3.0.



8. Click **'Finish'** to exit the installation wizard.

The installation of c360 Email To Case for Microsoft Dynamics CRM 3.0 is now complete.

For the product to be accessed and used, a valid license file must be installed if it is not already present. For questions about obtaining and/or installing a valid license file please refer to the section of this document titled 'Licensing'.



## Configuration Instructions \_\_\_\_\_

### Configuration Preparation

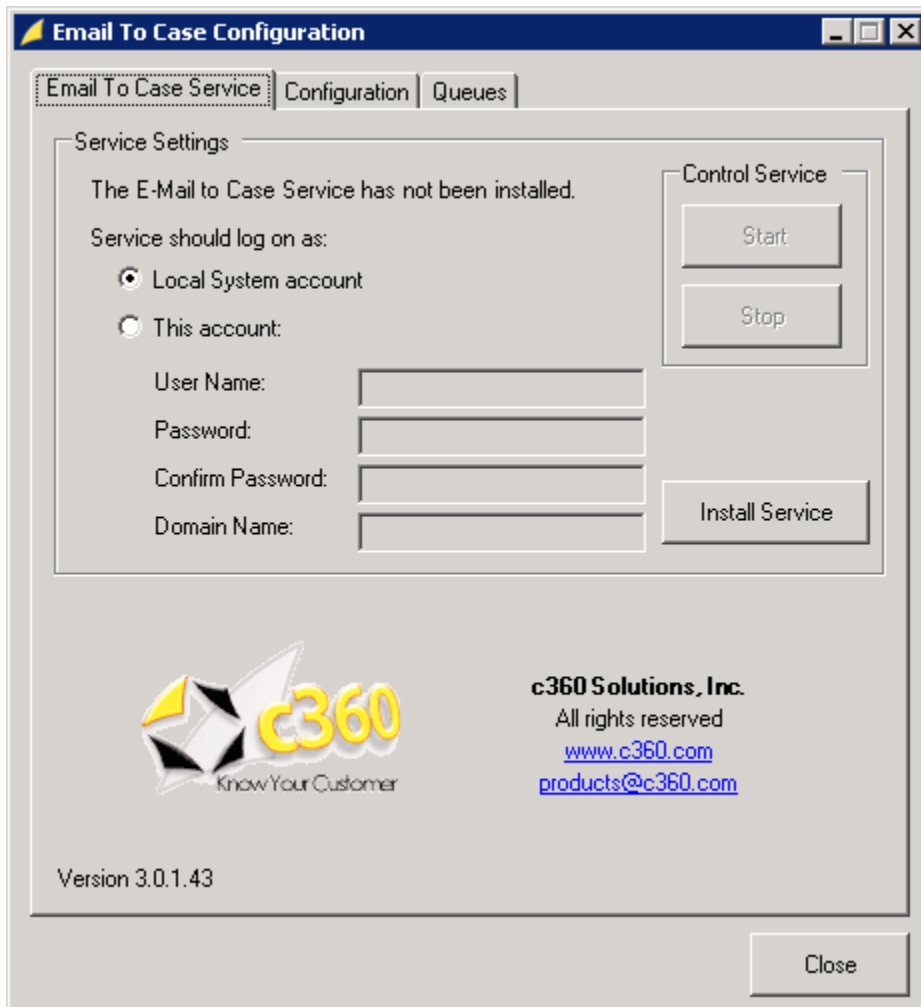
The configuration of Email To Case involves three steps. These are:

1. Configure one or more Microsoft CRM Queues to receive inbound email
  - a. Refer to Appendix A 'Creating or Editing a Microsoft CRM Queue'
2. Create a CRM login to allow Email To Case to communicate with Microsoft CRM
  - a. Refer to Appendix B 'Creating a CRM login for use by Email To Case'
3. Configure the Email To Case application
  - a. Once items 1 and 2 are complete proceed with the installation instructions below

### Configuration Instructions

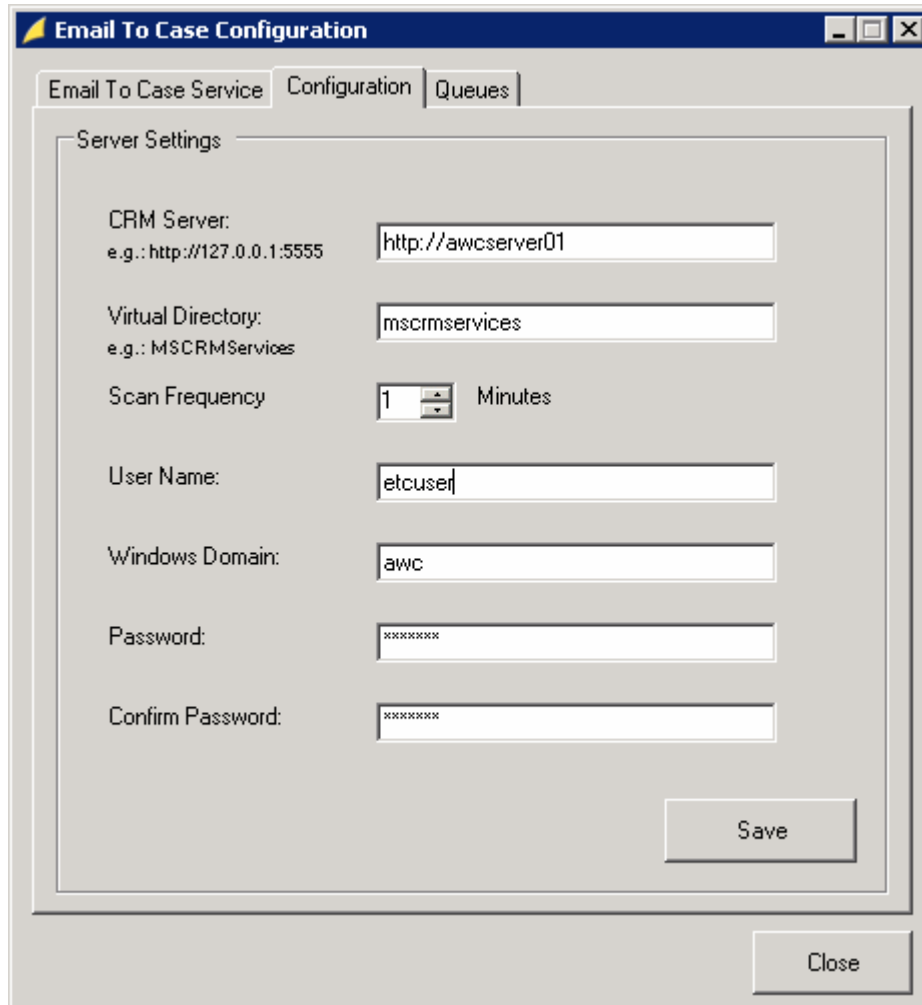
Follow these steps to configure Email To Case:

1. Double click the file named c360.EmailToCase.exe. The application's administrative interface will open and you can then click the 'Install Service' button to install the Email To Case service as illustrated in figure 1 below
  - a. **Note:** A shortcut of the file c360.EmailToCase is placed on the desktop or you can navigate to the Email To Case installation directory and launch it from there.



**Figure 1:** Configuring service settings with the Email To Case Service screen

2. Once the Email To Case service has been installed, specify the account under which you would like the service to log on. Choose Local System account or specify another account and 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.
3. Select the Configuration tab as illustrated in figure 2. Provide the requested values so that Email To Case may communicate with your Microsoft CRM installation. Table 1 provides an overview and example of each setting.



The image shows a Windows-style dialog box titled "Email To Case Configuration". It has three tabs: "Email To Case Service", "Configuration", and "Queues". The "Configuration" tab is selected. Inside the dialog, there is a section titled "Server Settings" which contains several input fields and a "Save" button. The fields are: "CRM Server:" with a text box containing "http://awcserver01" and a small example text "e.g.: http://127.0.0.1:5555"; "Virtual Directory:" with a text box containing "mscrmservices" and a small example text "e.g.: MSCRMServices"; "Scan Frequency" with a spinner box set to "1" and the text "Minutes"; "User Name:" with a text box containing "etcuser"; "Windows Domain:" with a text box containing "awc"; "Password:" with a text box containing "xxxxxxx"; and "Confirm Password:" with a text box containing "xxxxxxx". A "Save" button is located at the bottom right of the "Server Settings" section. At the very bottom of the dialog box is a "Close" button.

Field	Value
CRM Server	http://awcserver01
Virtual Directory	mscrmservices
Scan Frequency	1 Minutes
User Name	etcuser
Windows Domain	awc
Password	xxxxxxx
Confirm Password	xxxxxxx

**Figure 2:** Configuring Email To Case server settings

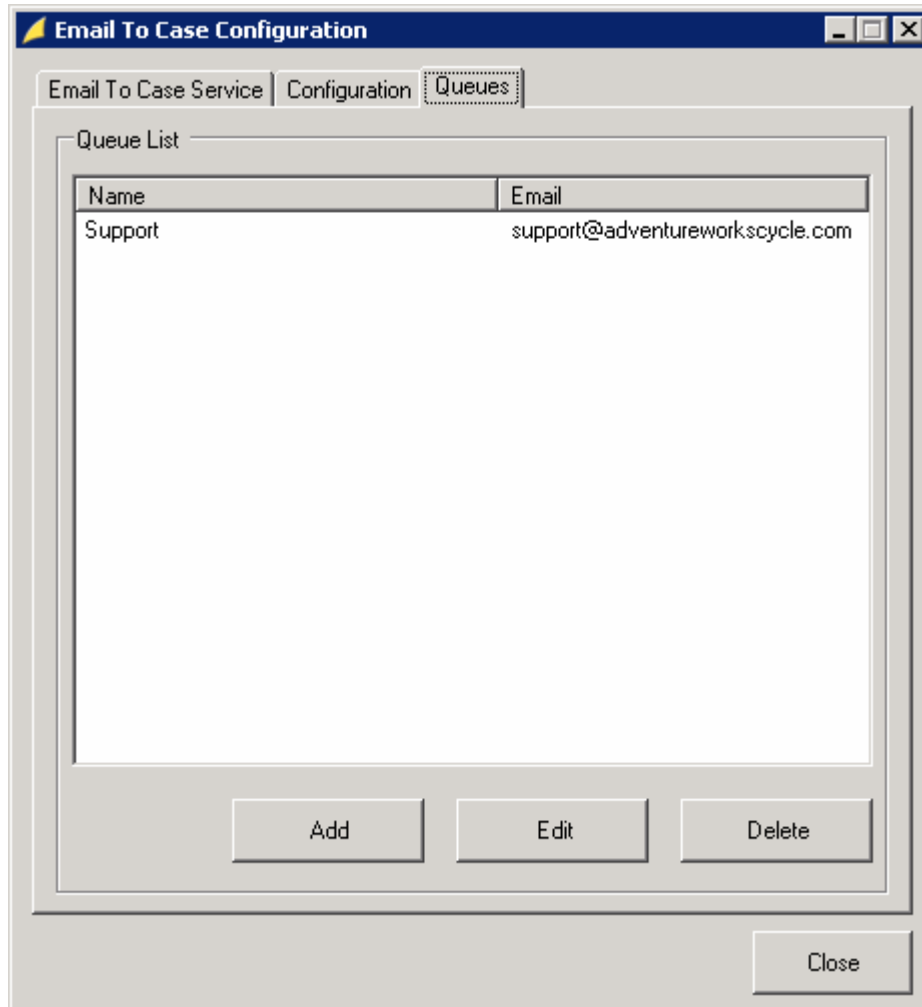


**Table 1:** Overview of Email To Case Server Settings

Setting	Description	Example
CRM Server IP Address	The IP address of the CRM server. Include the port number if using a port other than 80	<a href="http://192.168.1.100">http://192.168.1.100</a> or <a href="http://192.168.1.100:5555">http://192.168.1.100:5555</a>
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 Email To Case inspects the CRM queues	1
User Name	The CRM that user Email To Case uses to scan the queues and create Cases. Appendix B outlines the necessary security settings for this user.	etcuser
Windows Domain	The domain of the CRM user	awc
Password	The password for the CRM user	<i>Enter password here</i>
Confirm Password	Repeat the password for the CRM user	<i>Enter password here</i>

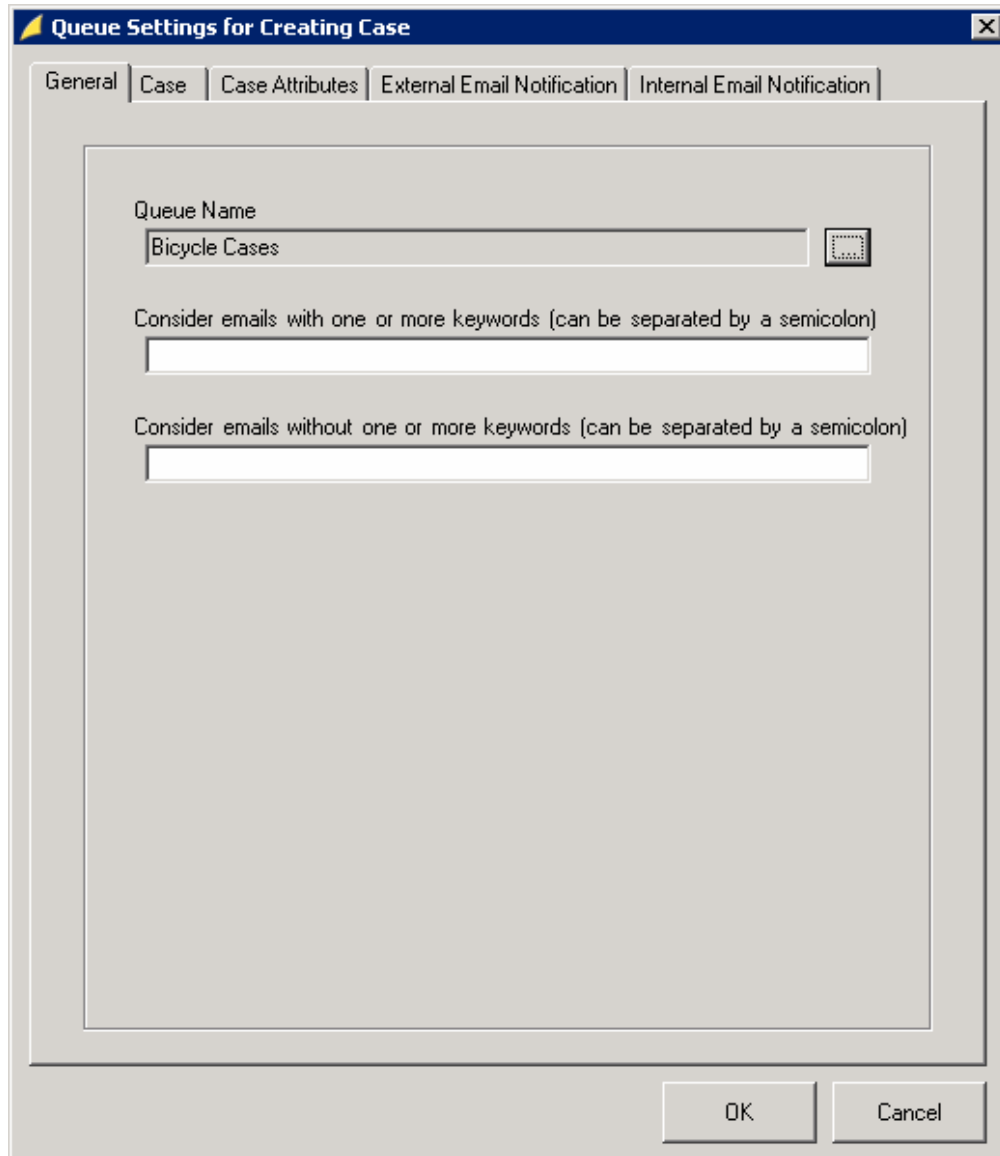
4. Once the Email To Case settings have been entered click the Save button to save them. These settings are saved to the c360.EmailToCase.config file. Please do not edit this file directly.

5. Select the Queues tab to begin configuring individual CRM queues. Figure 3 shows the Queues tab. Click the 'Add' button to configure a CRM queue to work with Email To Case.



**Figure 3:** Configuring Microsoft CRM queues to work with Email To Case

6. When the 'Add' button is selected the Queue Settings screen, illustrated in figure 4, is displayed.



**Figure 4:** The Queue Settings screen



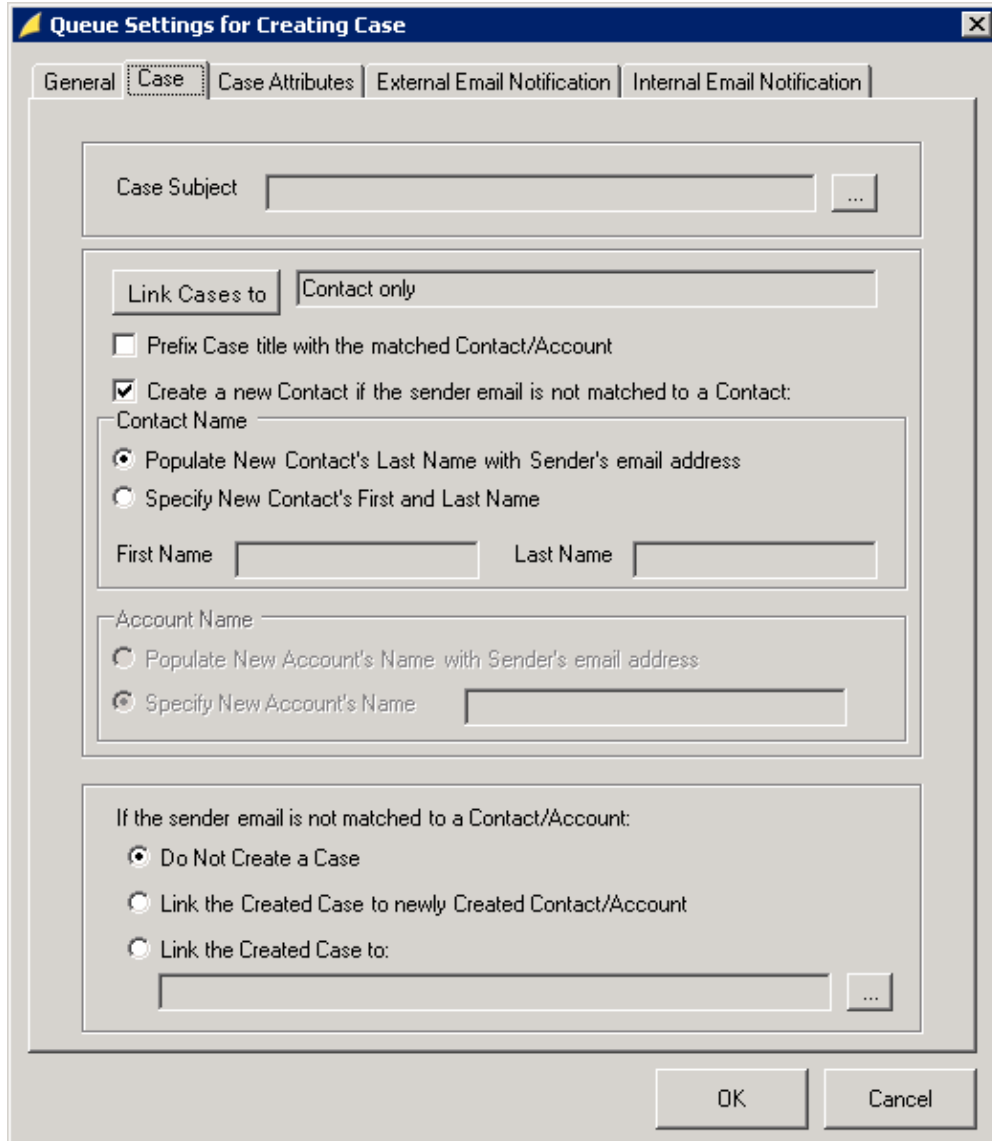


7. Complete the fields on the Queue settings screen. The table 2 below lists and describes the Queue Settings fields.

**Table 2:** Overview of Queue settings screen values

Field	Description
Queue Name	The Microsoft CRM queue for which you want Cases to be created from emails. Refer to Appendix A for information on how to create or edit a CRM Queue
Consider emails with one or more keywords	A keyword that Email To Case 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. This setting is optional
Consider emails without one or more keywords	A keyword that Email To Case will exclude and not create cases if it finds that keyword in the Subject line. For example, you may want "Out of Office" to be excluded when creating cases from emails. This setting is optional

8. Select the Case Tab (illustrated in figure 5) and configure the fields per the descriptions in table 3.



The screenshot shows a dialog box titled "Queue Settings for Creating Case" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Case" (which is selected), "Case Attributes", "External Email Notification", and "Internal Email Notification".

Under the "Case" tab, the following settings are visible:

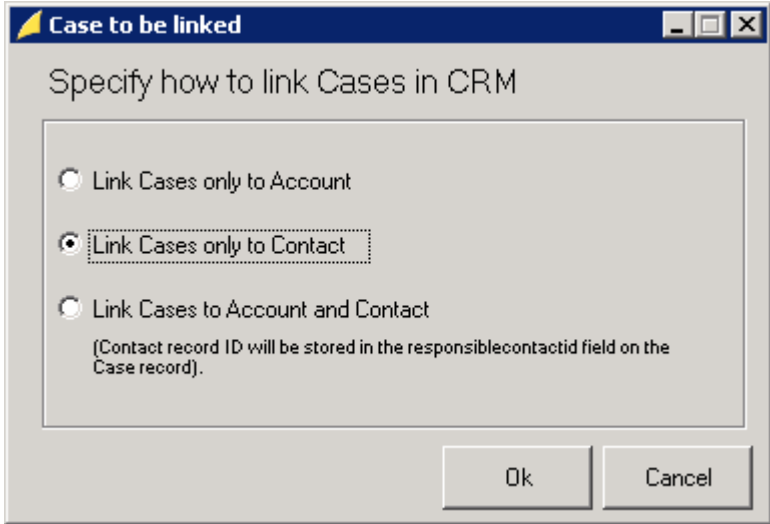
- Case Subject:** A text input field with a dropdown arrow (three dots) to its right.
- Link Cases to:** A dropdown menu currently showing "Contact only".
- ☐ Prefix Case title with the matched Contact/Account
- ☒ Create a new Contact if the sender email is not matched to a Contact:
  - Contact Name:**
    - ☒ Populate New Contact's Last Name with Sender's email address
    - ☐ Specify New Contact's First and Last Name
  - First Name:**  **Last Name:**
- Account Name:**
  - ☐ Populate New Account's Name with Sender's email address
  - ☒ Specify New Account's Name:
- If the sender email is not matched to a Contact/Account:**
  - ☒ Do Not Create a Case
  - ☐ Link the Created Case to newly Created Contact/Account
  - ☐ Link the Created Case to:  ...

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

**Figure 5:** The Case Configuration Settings Screen

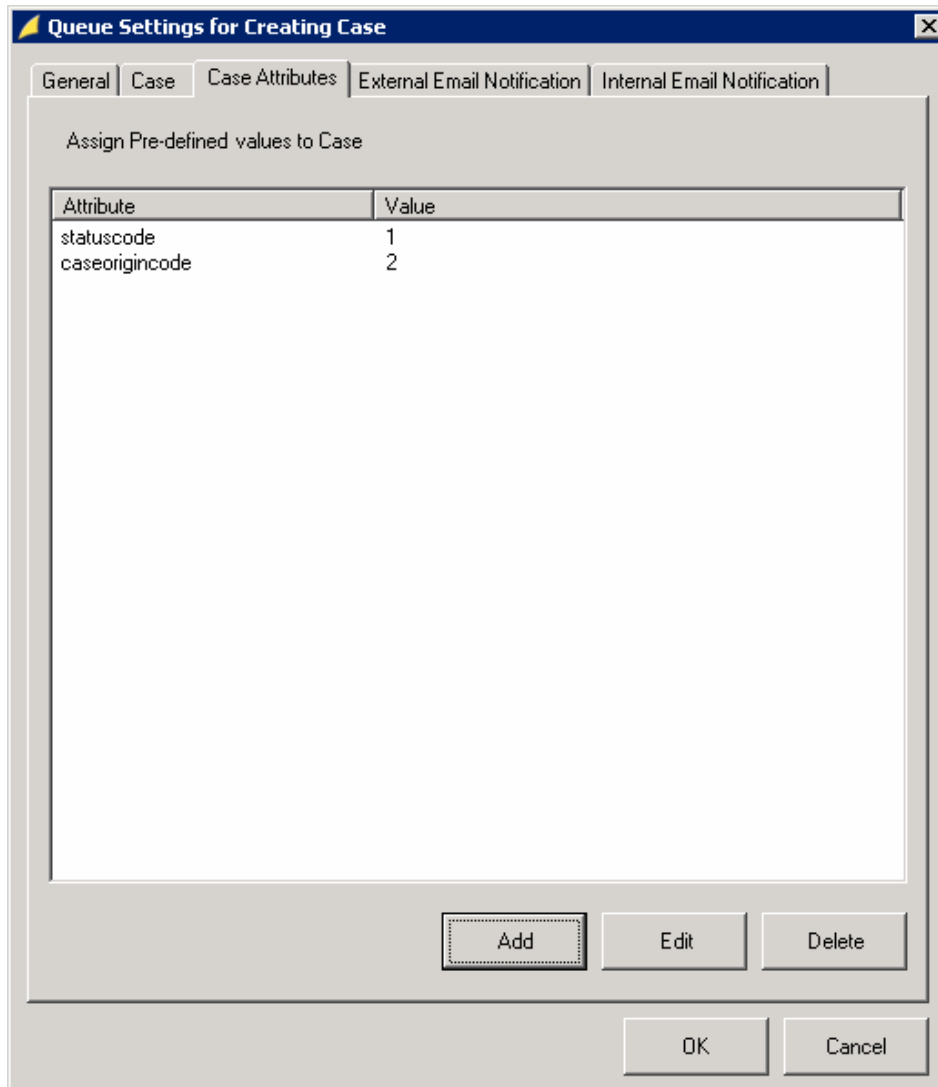
The table below lists and describes the Case Settings fields.

**Table 3:** Overview of Case screen values

Field	Description
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.
Link Cases to	<p>This field tells Email To Case whether to link the newly created Case to the email sender's Contact and/or Account record. Clicking this button displays the screen illustrated below. Note that when Cases are linked to both the Contact and Account the contact's ID is placed in the Case's responsiblecontactid field. By default, this field is not visible on the CRM form but can be added using CRM's customization tools.</p> 
Prefix Case title with the matched Contact/Account	Selecting this checkbox adds the Account or Contact name (based on the 'Link Cases to' setting) to the title of the created case.
Create a new Contact if the sender email is not matched to a Contact	You can check this option if you would like to create a new Contact/Account if sender email is not matched
Contact Name	In situations where a new Contact is created, you can specify that the last name field of the Contact be created with sender's email address. Alternatively, you may specify static firstname and lastname values to be used for the Contact to be created
Account Name	In situations where a new Account is created, you can specify the Name of the Account to be created with sender email address. Alternatively, you may specify a static name value to be used for the Account to be created
If the Sender is not matched to a Contact/Account:	<p>In situations where an email is received from an email address that is not found in the Microsoft CRM Contact or Account tables, you can choose one of the following options:</p> <ul style="list-style-type: none"> <li>- Do not create a case for the email</li> <li>- Link the Case created by Email To Case to the newly created Contact or Account</li> <li>- Link the Case created by Email To Case to the Contact or Account selected here.</li> </ul>

9. Select the Case Attributes tab and configure any case fields that you would like to be completed 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 6 shows the Case Attributes screen. For reference, Appendix C 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 | **Case Attributes** | External Email Notification | Internal Email Notification

Assign Pre-defined values to Case

Attribute	Value
statuscode	1
caseorigincode	2

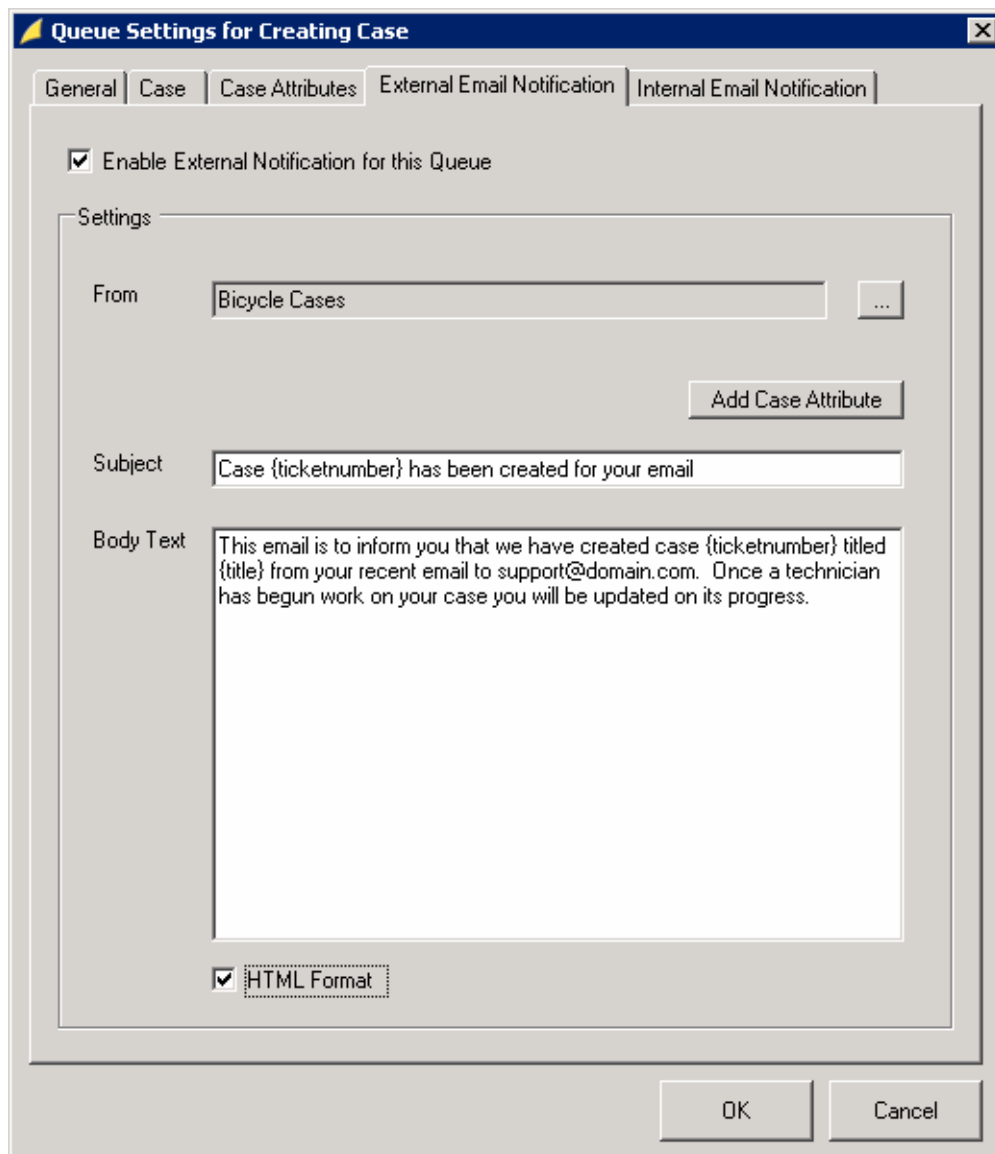
Add Edit Delete

OK Cancel

**Figure 6:** Configuring default values for Cases created by Email To Case

10. Select the External Email Notification tab, pictured in Figure 7. 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 a close button (X) in the top right corner. The dialog has five tabs: "General", "Case", "Case Attributes", "External Email Notification" (which is selected), and "Internal Email Notification".

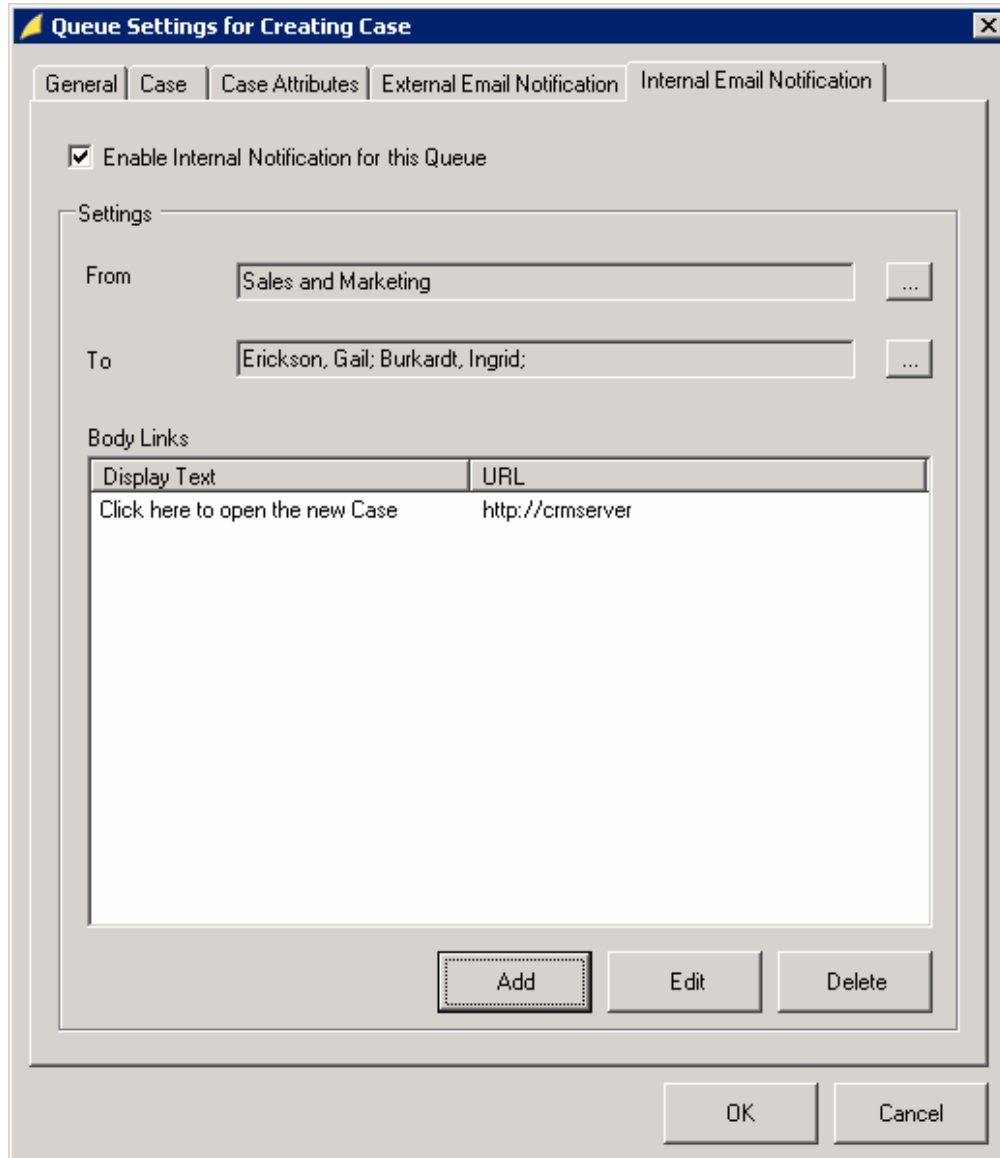
Under the "External Email Notification" tab, there is a checkbox labeled "Enable External Notification for this Queue" which is checked. Below this is a "Settings" section containing:

- A "From" field with the text "Bicycle Cases" and a button with three dots to its right.
- An "Add Case Attribute" button.
- A "Subject" field with the text "Case {ticketnumber} has been created for your email".
- A "Body Text" field with the text: "This email is to inform you that we have created case {ticketnumber} titled {title} from your recent email to support@domain.com. Once a technician has begun work on your case you will be updated on its progress."
- A checkbox labeled "HTML Format" which is checked.

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

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

11. Select the Internal Email Notification tab, pictured in Figure 8, 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 screenshot shows a dialog box titled "Queue Settings for Creating Case" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Case", "Case Attributes", "External Email Notification", and "Internal Email Notification". The "Internal Email Notification" tab is selected.

Inside the "Internal Email Notification" tab, there is a checkbox labeled "Enable Internal Notification for this Queue" which is checked. Below this is a "Settings" section containing two text input fields:

- From:** Sales and Marketing (with a dropdown arrow)
- To:** Erickson, Gail; Burkardt, Ingrid; (with a dropdown arrow)

Below the "Settings" section is a "Body Links" section. It contains a table with two columns: "Display Text" and "URL".

Display Text	URL
Click here to open the new Case	http://crmserver

At the bottom of the "Body Links" section are three buttons: "Add", "Edit", and "Delete". At the very bottom of the dialog box are "OK" and "Cancel" buttons.

**Figure 8:** Configuring the internal email notification to be sent when a Case has been created



## Licensing

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### **For c360 Email To Case v1.2 with a valid license**

The existing Email To Case v1.2 license files will work with c360 Email To Case Microsoft Dynamics CRM 3.0 version.

The license files have to be copied from the 1.2 installation license location to the 3.0 installation license location. The 3.0 installation license location is “{\$Installation Folder}\V3\Licenses” where {\$Installation Folder} is the installation path specified by you during the install.

**Note:** The default Installation folder is “C:\Program Files\c360 Solutions” so the license directory location is “C:\Program Files\c360 Solutions\V3\Licenses”

### **For new installation of c360 Email To Case for Microsoft Dynamics CRM 3.0**

License setup application can be obtained from c360 Solutions Inc upon request. This application is an executable file designed to be run on the CRM server. Copy the License setup application to the CRM server and double click it to run the application. It will automatically place the license file in the appropriate directory.

### **Evaluation Licenses**

To request a 15 day production evaluation license go to our web site at <http://www.c360.com/Evaluation.aspx>. You will be emailed a licensing application that, when run, will place a valid license file in the appropriate directory.

### **Demo Licenses**

To download “demo licenses” for one of the sample Microsoft Dynamics CRM 3.0 installations for organization names ‘Adventure Works Cycle Demo’, ‘Adventure Works Cycle’ or ‘Microsoft CRM’, please visit our website at <http://www.c360.com/Licenses.aspx>



## Uninstall instructions

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### Steps to uninstall c360 Email To Case for Microsoft Dynamics CRM 3.0:

1. On the CRM server where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select c360 Email To Case for Microsoft CRM 3.0 from the list of the currently installed programs.
3. Click 'Remove'.
4. Click 'Yes' in the confirmation message box to begin the uninstall process.





## Appendix A - Creating or Editing a Microsoft CRM Queue

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### How Email To Case works

c360 EmailToCase is a Windows service that monitors CRM queues in Microsoft CRM, taking email activities from those queues and creating Case records from them.

Because Email To Case is monitoring Microsoft CRM queues, those queues must already be set up to convert inbound emails into Microsoft CRM email activities. The section below includes an excerpt from the Microsoft CRM 3.0 help file explaining how to create or edit a Microsoft CRM queue so that it receives inbound emails.

### Create or edit a queue

A queue is a holding container in Microsoft CRM for work items such as activities, cases, and knowledge base articles. You can create queues to bundle customer-related activities or cases, and then assign those queues to specific users such as a customer service representative (CSR). Customer service teams frequently use queues to share cases.

As soon as a queue is created, it is visible to users in the Queues area. For example, in the Queues area, under **My Work**, you can view queues of your activities and cases sorted into **Assigned** and **In Progress** folders. Under **Queues**, you see folders for each queue of which you are a member. When a user has finished working with a specific case or activity in a queue, that work item can be assigned to another queue or to a user, removing it from the original queue.

Queues can also contain knowledge base articles. In the Knowledge Base area, you can view knowledge base articles that are sorted into **Draft**, **Unapproved**, and **Published** folders.

You can find the **Queues** tab under **My Work** in the **Workplace** pane.

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### Create or edit a queue

You can edit an existing queue by following steps 1 and 2 to navigate to the Queue area. Then open the record you want to edit. Use the information in this procedure to guide you in entering data.

1. In the **Navigation Pane**, click **Settings**.
2. Under **Settings**, click **Settings**. Then, in the Settings area click **Business Unit Settings**, and then click **Queues**.
3. On the **Actions** toolbar, click **New**.
4. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
  - **Queue Name**  
In this field, enter a name that describes the queue's purpose, business focus, or other meaningful characteristic.



- **Business Unit**

Click **Lookup**  to search for and select a business unit.

- **Owner**

Click **Lookup** to search for and select an owner.

- **E-mail**

Enter the e-mail address for the person to whom e-mail sent to the queue should be directed. E-mail addresses must be valid. For example, **someone@microsoft.com**.

- Under **Incoming E-mail**, select one of the following options:

- **All incoming e-mail**

Convert all incoming e-mail to an e-mail activity.

– OR –

- **Only e-mail about existing Microsoft CRM records**

Convert only e-mail that is about an existing Microsoft CRM record.

5. Click **Save** or **Save and Close**.

#### **Note**

If a queue does not have an e-mail address assigned to it in the **E-mail** field, then the queue will not receive any e-mail activity in Microsoft CRM. If you enter a user's e-mail address, e-mail sent to the queue goes to that e-mail address. A queue can also share an e-mail address with a record such as an account or contact.



## **Appendix B - Creating a CRM Login for use by Email To Case**

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### **Overview**

Email To Case must communicate with the CRM server in order to view the contents of Queues, create Cases, link Email Activities to Cases, link cases to Contacts and/or Accounts and create/send Email Activities from Cases. To do this, Email To Case requires a CRM login/user with a minimum level of permissions. This login/user can be a dedicated login/user solely use by Email To Case or can be a shared login used by other processes and/or individuals. The CRM login/user must have the following privileges:

- Activity – Create, Read, Write (Organization)
- Queue – Read (Organization)
- Case – Create, Read, Write, Append, Append To, Assign (Organization)



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

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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 Entity 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) Active – On Hold (2) Active – Waiting for Details (3) Active – Researching (4) Resolved – Problem Solved (5) 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) Silver (2) Bronze (3)	Contractservicelevelcode
Case Origin	None	Picklist	Phone (1) E-mail (2) Web (3)	Caseorigincode
Priority	None	Picklist	High (1) Normal (2) Low (3)	Prioritycode
Satisfaction	None	Picklist	Very Satisfied (1) Satisfied (2) Neutral (3) Dissatisfied (4) Very Dissatisfied (5)	Customersatisfactioncode
Case Type	None	Picklist	Question (1) Problem (2) Request (3)	Casetypecode