



c360 Email To Case for Microsoft Dynamics CRM 3.0

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.

The screenshot illustrates the Email To Case process flow in Microsoft Dynamics CRM 3.0. It shows three overlapping windows:

- Top Window (Email Client):** Displays an incoming email from Adrian Dumitrascu with the subject "Help needed with my bikes". The email content reads: "Hi Support, I am having problems with my bike. Adrian".
- Middle Window (Case Record):** Shows a case record for "Case: CAS-01050-ZQNSBC" with a status of "Active".
- Bottom Window (Case Details):** Provides a detailed view of the case, including fields for Title, Customer, Subject, Assignment Information, and Contract and Product Information.

The Case Details window includes the following information:

- General:** Title: Help needed with my bikes; Customer: Adrian Dumitrascu; Subject: Bikes; Case Type: [Dropdown]; Case Origin: [Dropdown]; Satisfaction: [Dropdown].
- Assignment Information:** Owner: CRM; Status Reason: In Progress; Follow Up By: [Dropdown]; Priority: [Dropdown].
- Contract and Product Information:** Contract: [Dropdown]; Product: [Dropdown]; Contract Line: [Dropdown]; Serial Number: [Dropdown]; Service Level: [Dropdown].

The bottom window also shows a "Status: Completed" message and a "Done" button.

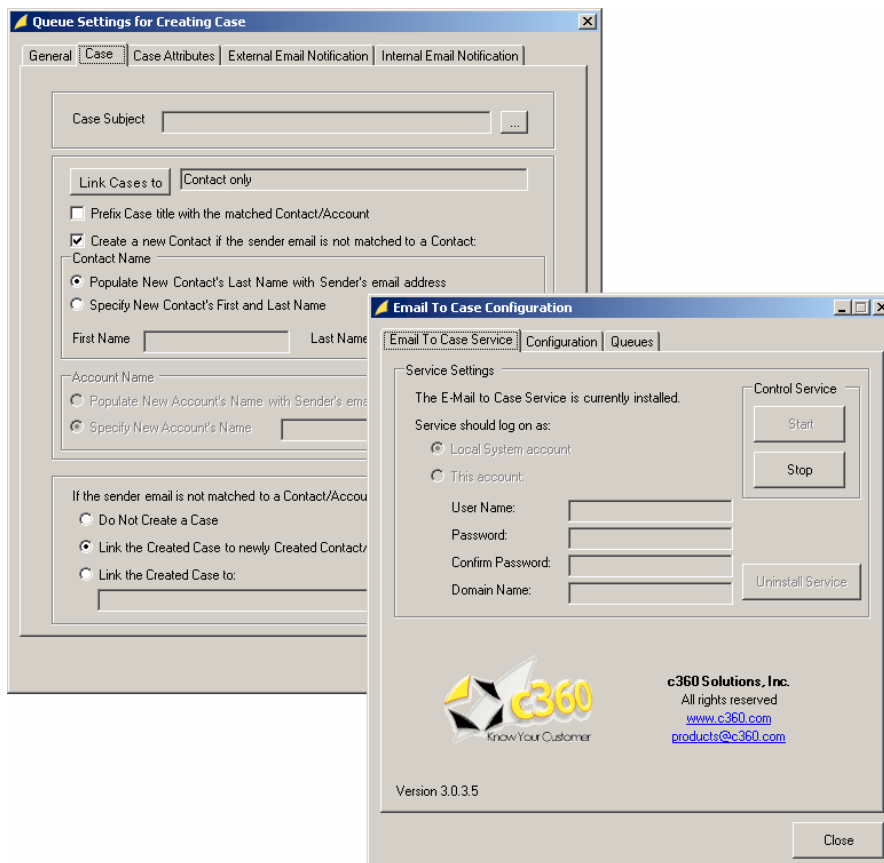
Email To Case process flow

Email To Case 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 Email To Case is:

- Customer sends e-mail to queue alias (e.g. 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 (default 1 minute) 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 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 e-mail 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



Email To Case configurability

Email to Case allows the CRM system administrator to set global configuration options including:

- Frequency at which the service will convert incoming e-mails into Cases



- Default Case object field values (Email To Case can work with an unlimited number of Microsoft CRM queues and for each queue the Case field default field values can be set differently)
- Ability to designate whether Cases should be linked to the Contact or Account record
- Default Contact or Account to be used when sender's e-mail address cannot be resolved
- Use of a e-mail subject line keyword to tell Email To Case which e-mails to convert into Cases (for example, this can be used to ensure that only e-mails whose subject begins with the word 'case' should be converted into Cases. This is useful for filtering spam and ensuring that only legitimate requests become service Cases)

Evaluation Copies

Free evaluation copies of Email To Case can be obtained from c360 Solutions' web site. Evaluation copies come with a license key that provides unlimited usage with the Adventure Works sample installation of Microsoft CRM. 15-day trial production evaluation license files are also available on the c360 web site by providing your Microsoft CRM Organization Name.

Pricing

Email To Case is available as a standard product in the c360 Service Productivity Pack. For details on the Service Productivity Pack, visit <http://www.c360.com/ProductivityPack.aspx>. Pricing information is available at <http://www.c360.com/Pricing.aspx>

Licensing

Email to Case licensing is based on the number of Microsoft CRM users in the deployment. The number of Email To Case licenses must equal or exceed the number of assigned user licenses. For example, a company that has purchased 25 Microsoft CRM licenses, but has only 11 of them assigned to users needs 11 Email To Case licenses.

Site Licensing

Large Microsoft CRM sites can inquire about site licenses by phoning the c360 product line at 888.929.3670 x2.

Support, Upgrades and Enhancements

The list price of Email To Case includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchase for 20% of the total cost of all Email To Case licenses.

c360 Partner Program

Authorized Microsoft CRM partners may inquire about the c360 partner program by sending an e-mail to Partners@c360.com.

More Information

For more information on Email To Case, contact c360 Solutions at:

c360 Solutions Incorporated
One Dunwoody Park, Suite 130
Atlanta, GA 30338
(888) 929-3670 x2
<http://www.c360.com>
Products@c360.com