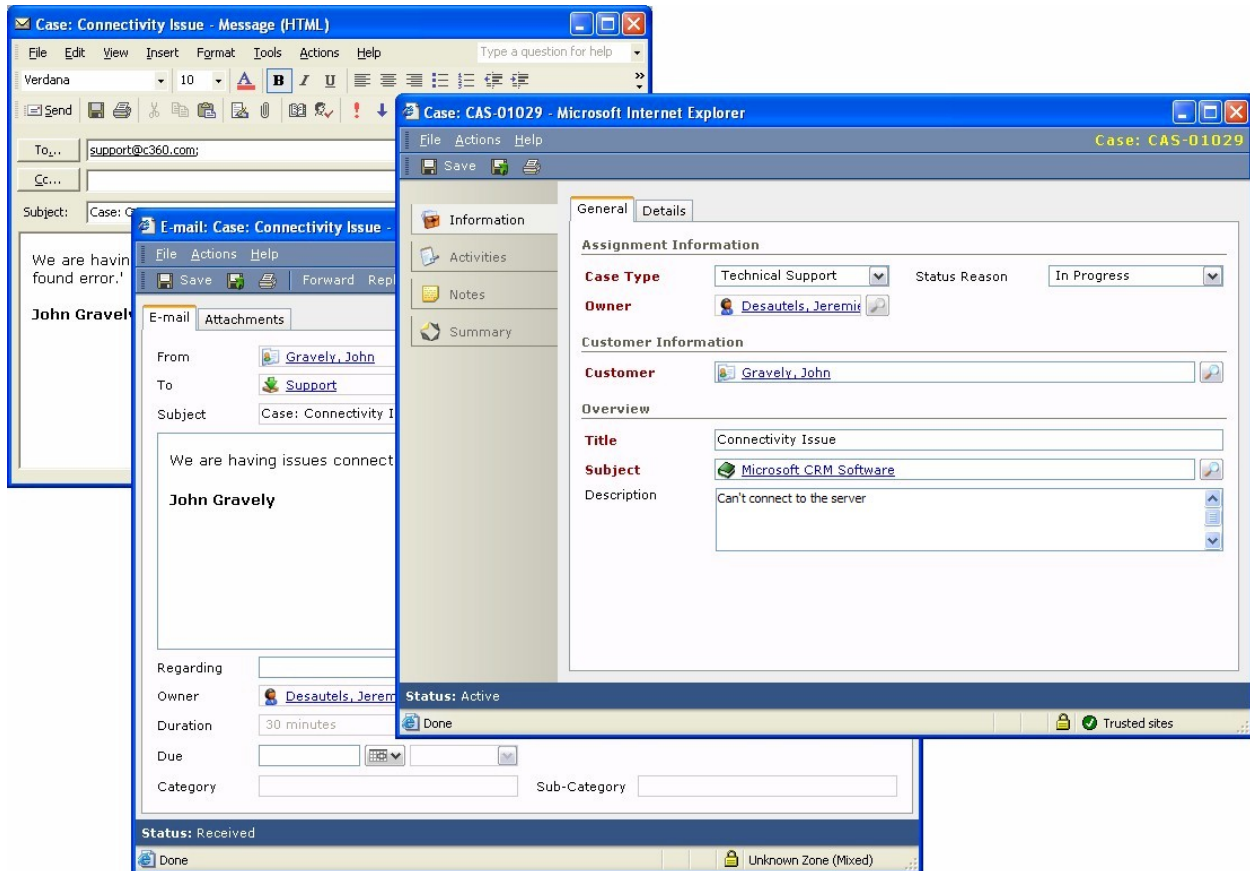# c360 Email To Case for Microsoft CRM

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.


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
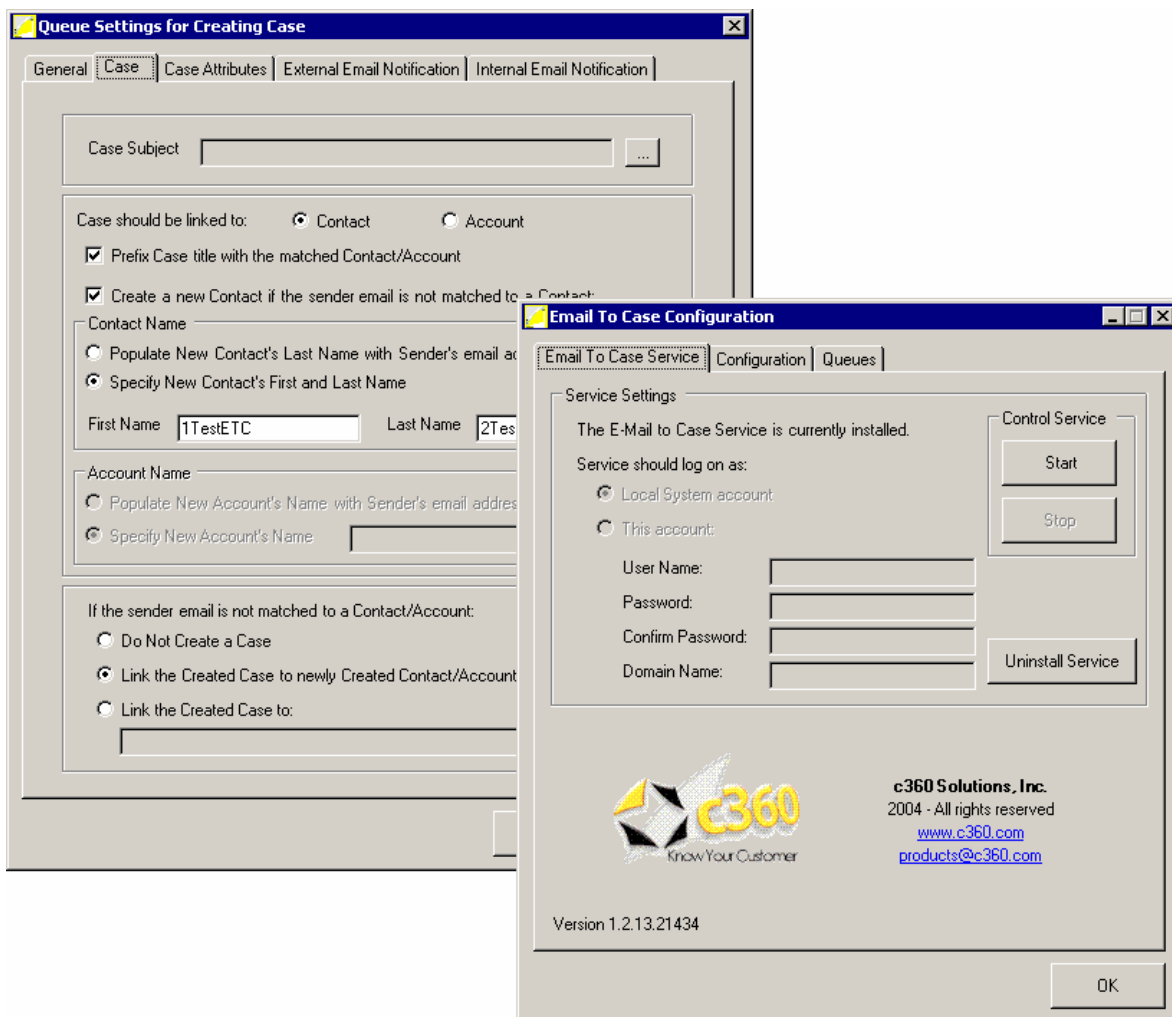
Email To Case configurability

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)

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

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.

More Information
Information For more information on c360 Summary and the Core Productivity Pack, contact your c360 reseller:

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