

Setting Up Email-to-Case or On-Demand Email-to-Case

Email-to-Case is available in: **Professional, Enterprise, Unlimited, and Developer** Editions

On-Demand Email-to-Case is available in **Professional, Enterprise, Unlimited, and Developer** Editions

User Permissions Needed

To set up Email-to-Case or On-Demand Email-to-Case: “Customize Application”

To enable Email-to-Case or On-Demand Email-to-Case: “Modify All Data”

AND

“Customize Application”

Salesforce.com can automatically create a case when an email is sent to one of your company's email addresses, such as support@company.com. This Email-to-Case functionality auto-populates case fields from the content of each email. For example, an email subject heading becomes a case subject. Your organization can set up Email-to-Case or On-Demand Email-to-Case to efficiently resolve and correspond with customer inquiries via email.

Salesforce.com allows you to choose one of two Email-to-Case options:

Email-to-Case

Email-to-Case requires downloading the Email-to-Case agent from wiki.developerforce.com/index.php/Email_To_Case and installing the agent behind your network's firewall.

Use Email-to-Case if you have a requirement to keep all email traffic within your firewall, and you want to accept email attachments larger than 10 MB from customers.

On-Demand Email-to-Case

On-Demand Email-to-Case uses [Apex email services](#) to convert email to cases, without you having to download and install an agent behind your network's firewall.

Use On-Demand Email-to-Case if you are not concerned about keeping email traffic within your firewall, and you do not need to accept attachments larger than 10 MB from customers.

Setting Up Email-to-Case

The following high-level steps outline how to set up Email-to-Case:

1. Determine the email routing addresses that your customers can use to submit cases to your support team. Emails are automatically converted to cases based on the settings specified for each routing address.
2. In Salesforce.com, enable Email-to-Case and configure your email routing addresses. See [Enabling and Configuring Email-to-Case](#) on page 1103.
3. Download the Email-to-Case agent from wiki.developerforce.com/index.php/Email_To_Case.
4. Install the agent behind your network's firewall.
5. Test your email routing addresses:
 - a. Manually send emails to the routing addresses.
 - b. Verify that the emails convert to cases based on their routing address settings.

6. Add the email address that you configured to your company's support website. This is the email address customers can use to submit cases to your support team.
7. Add the Emails related list to the Cases page layout. For more information, see [Customizing Page Layouts](#) on page 1014.



Note: You can create email templates that support reps can use to respond to Email-to-Case or On-Demand Email-to-Case emails. These templates can include merge fields that display information from the original email in the response. See [Managing Email Templates](#) on page 423.

Setting Up On-Demand Email-to-Case

The following high-level steps outline how to set up On-Demand Email-to-Case:

1. Determine the email routing addresses that your customers can use to submit cases to your support team. Emails are automatically converted to cases based on the settings specified for each routing address.
2. In Salesforce.com, configure your email routing addresses and enable On-Demand Email-to-Case. See [Enabling and Configuring On-Demand Email-to-Case](#) on page 1107.
3. Configure your email system to forward case submissions to the email services address provided to you by Salesforce.com. For more information, see your email system's documentation.
4. Test your email routing addresses:
 - a. Manually send emails to the routing addresses.
 - b. Verify that the emails convert to cases based on their routing address settings.
5. Add the email address that you configured to your company's support website. This is the email address customers can use to submit cases to your support team.
6. Add the Emails related list to the Cases page layout. For more information, see [Customizing Page Layouts](#) on page 1014.



Note: You can create email templates that support reps can use to respond to Email-to-Case or On-Demand Email-to-Case emails. These templates can include merge fields that display information from the original email in the response. See [Managing Email Templates](#) on page 423.

Enabling and Configuring Email-to-Case

Available in: **Professional, Enterprise, Unlimited, and Developer** Editions

User Permissions Needed	
To set up Email-to-Case:	“Customize Application”
To enable Email-to-Case:	“Modify All Data”
	AND
	“Customize Application”

This topic describes how to enable and configure Email-to-Case using the options available on the Email-to-Case Settings page. In addition, refer to [Setting Up On-Demand Email-to-Case](#) for the high-level steps you should perform before and after the tasks described in this topic.

This topic is intended for customers who are running the Email-to-Case agent within their network's firewall, as opposed to On-Demand Email-to-Case which uses [Apex email services](#). For information on enabling and configuring On-Demand Email-to-Case, see [Enabling and Configuring On-Demand Email-to-Case](#) on page 1107.

Before getting started, review the information in [Tips on Email-to-Case](#) on page 1106.

To implement Email-to-Case, you need to add a new email routing address, verify the new email routing address, and enable Email-to-Case:

1. Click **Setup** ► **Customize** ► **Cases** ► **Email-to-Case**.

From the Email-to-Case Settings page, you can:

- Click **Edit** to edit an existing routing address.
- Click **Del** to delete an existing routing address.
- Click **Verify** to confirm and verify the email address used in an existing routing address. A verification email is immediately sent to the new routing address, which includes a link, that when clicked, completes the verification process.

2. From the Routing Addresses related list, click **New**. You can create up to 50 routing addresses to administer separate email addresses for Email-to-Case. A routing address is activated after Email-to-Case is enabled.

3. Enter the routing address settings.

Setting	Description
Routing Name	The name for the routing address. For example, Gold Support or Standard Support.
Email Address	The inbound email address for this Email-to-Case routing address. Emails sent to this address are created as cases using the specified settings. The email address must be unique. Note that this is the email address to which you will provide a link on your company's support website.
Save Email Headers	Select this checkbox to save the email routing information associated with each email submitted as a case. Saving email routing information counts towards your organization's overall storage limit . To view email headers from an email converted to a case, see Working with Case Emails on page 2292.
Create Task from Email	Select this checkbox to automatically assign a task to the case owner when an email is submitted as a case. Assignment rules automatically assign owners to a case; however, if a case does not match assignment rule criteria, then the user in the <code>Default Case Owner</code> field on the Support Settings page is assigned to the case. For more information, see Setting Up Assignment Rules on page 1047 and Customizing Support Settings on page 1097.

Setting	Description
Task Status	Choose a status from this drop-down list with which to predefine the <code>Status</code> field on tasks automatically assigned to case owners when email is submitted as cases. This setting is only available if you selected the <code>Create Task from Email</code> checkbox.
Case Priority	The priority assigned to cases created from emails sent to this email address.
Case Origin	The value assigned to the <code>Case Origin</code> field for cases created via this Email-to-Case routing information.
Case Record Type	The record type used to create cases from emails sent to this email address. If a routing address has a case record type of "None," then new cases will default to the record type of the user configured in the Email-to-Case agent. If your organization does not use record types, this setting is not available.

- Click **Save** to save the routing address settings.

Alternatively, click **Save & New** to save the routing address, and then create a new routing address.

A verification email is immediately sent to the new routing address, which will not be verified until you click the verification link in the email.

- Click the link in the verification email.

Optionally, click **Verify** next to the email address on the Email Address detail page to have Salesforce.com send another verification email to the new routing address.

Salesforce.com notifies you when the new email routing address is verified.

- Click **Continue**.
- Return to the Email-to-Case Settings page by clicking **Setup** ► **Customize** ► **Cases** ► **Email-to-Case**.
- Click **Edit** to apply the following Email-to-Case settings:

Email-to-Case Setting	Description
Enable Email-to-Case	Select this checkbox to activate Email-to-Case.
Notify Case Owners on New Email	Select this checkbox to allow case owners to automatically receive notifications when email arrive for their existing cases. Email notifications assign a task to the case owner to respond to the new email. Responding to the email closes the task. To disable email notifications at any time, simply deselect the checkbox.
Enable HTML Email	Select this checkbox to warn users before they view incoming HTML email content so that they can avoid opening potentially malicious HTML that could harm their

Email-to-Case Setting	Description
	<p>computers. With this setting disabled, users will see text instead of HTML on email message detail pages, and when users reply to an email, the text version of the email will be copied to the email editor, instead of the HTML version. To disable HTML email warnings at any time, simply deselect the checkbox.</p>
Email Subject	<p>Select this checkbox to add the thread ID to the subject of email.</p> <p>You can choose whether the thread ID should be included in the emails users send from cases. The thread ID is the unique ID of each case email, such as [ref:00DxRtp.500xXFKf:ref]. By default, the thread ID is added to both the subject and body of case emails.</p>
Email Body	<p>Select this checkbox to add the thread ID to the body of email.</p> <p>You can choose whether the thread ID should be included in the emails users send from cases. The thread ID is the unique ID of each case email, such as [ref:00DxRtp.500xXFKf:ref]. By default, the thread ID is added to both the subject and body of case emails.</p>

9. Click Save.

Tips on Email-to-Case

Consider the following when setting up a routing address for Email-to-Case:

- When a customer sends an email to this routing address, a case is created in your organization with the email subject as the case **Subject** and the email body as the case **Description**.
- The **Priority**, **Case Origin**, and **Case Record Type** fields auto-populate the case via the routing address settings when the routing address is included in either the **To**, **CC**, or **BCC** fields of an inbound email. Salesforce.com processes the routing address of an inbound email in the following order and stops at the first match:
 1. **To**
 2. **CC**
 3. **BCC**

Note that some email applications do not automatically send **BCC** information. Therefore, case fields may not auto-populate properly if the routing address is included in the **BCC** field of an inbound email.

- To have cases that are created via Email-to-Case automatically display in the Self-Service portal, see [Enabling Self-Service Features and Settings](#) on page 1122.
- The limit on the number of emails a day that an organization can convert into cases is 2500 per day for Professional, Enterprise, Unlimited, and Developer Editions (total number of cases, inclusive of all email addresses). If your organization exceeds its daily Email-to-Case limit, the following API exception code is returned to the Email-to-Case agent: **EMAIL_TO_CASE_LIMIT_EXCEEDED**. You can configure the agent to take appropriate action, such as notifying your administrator, when this occurs.

- Deselect both the `Email Subject` and `Email Body` checkboxes to prevent the thread ID from being added to emails. If you deselect both the `Email Subject` and `Email Body` checkboxes, then all incoming responses to outbound case emails create new cases.
- When you reply to email messages in the Email related list on cases, the `From:` field on your email may display to recipients as `no-reply@salesforce.com` or `support@company.com`. This is due to how the recipients' email applications receive `Sender` and `From` headers on inbound email. By default, an `Enable Sender ID compliance` setting is selected for your organization, which enables email messages sent from `Salesforce.com` to comply with email applications that require `Sender` headers for delivery. For more information, see [Configuring Deliverability Settings](#) on page 776.

See Also:

[Displaying and Editing Cases](#)

[Working with Case Emails](#)

[Managing Assignment Rules](#)

[Setting Up Auto-Response Rules](#)

Enabling and Configuring On-Demand Email-to-Case

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed	
To set up On-Demand Email-to-Case	“Customize Application”
To enable On-Demand Email-to-Case	“Modify All Data”
	AND
	“Customize Application”

This topic describes how to enable and configure On-Demand Email-to-Case using the options available on the Email-to-Case Settings page. In addition, refer to [Setting Up On-Demand Email-to-Case](#) for the high-level steps you should perform before and after the tasks described in this topic.

Before getting started, review the information in [Tips and Considerations for On-Demand Email-to-Case](#) on page 1111.

To enable and configure On-Demand Email-to-Case, perform the following procedures in order:

1. [Enabling On-Demand Email-to-Case](#)
2. [Defining and Verifying Email Routing Addresses](#)
3. [Configuring Email-to-Case Settings](#)

Enabling On-Demand Email-to-Case

To enable On-Demand Email-to-Case:

1. Click **Setup** ► **Customize** ► **Cases** ► **Email-to-Case** to open the Email-to-Case settings page.
2. Click **Edit**.
3. Select the `Enable Email-to-Case` checkbox. After you enable Email-to-Case, it cannot be disabled.

4. Select the `Enable On-Demand Service` checkbox.

To disable On-Demand Email-to-Case at any time, deselect the checkbox. You can also re-enable On-Demand Email-to-Case at any time.

5. Click `Save`. You will configure the remaining settings later.

Defining and Verifying Email Routing Addresses

To define and verify email routing addresses:

1. Click **Setup** ► **Customize** ► **Cases** ► **Email-to-Case** to open the Email-to-Case settings page.
2. On the Routing Addresses related list, click **New**.
3. Enter the routing address settings:

Setting	Description
Routing Name	The name for the routing address. For example, Gold Support or Standard Support.
Email Address	The inbound email address for this On-Demand Email-to-Case routing address. Email sent to this address creates new cases using the specified settings. The email address must be unique. Note that this is the email address to which you will provide a link on your company's support website.
Save Email Headers	Select this checkbox to save the email routing information associated with each email submitted as a case. Saving email routing information counts towards your organization's overall storage limit. For more information, see Monitoring Resources on page 595. To view email headers from an email converted to a case, see Working with Case Emails on page 2292.
Accept Email From	Leave this field blank to allow On-Demand Email-to-Case to receive email from any email address or domain. Or, you can limit the email addresses and domains available for On-Demand Email-to-Case by entering them in this field.
Create Task from Email	Select this checkbox to automatically assign a task to the case owner when an email is submitted as a case. Assignment rules automatically assign owners to a case; however, if a case does not match assignment rule criteria, then the user in the <code>Default Case Owner</code> field on the Support Settings page is assigned to the case. For more information, see Setting Up Assignment Rules on page 1047 and Customizing Support Settings on page 1097.
Task Status	Choose a status from this drop-down list with which to predefine the <code>Status</code> field on tasks automatically assigned to case owners when email is submitted as cases. This setting is only available if you selected the <code>Create Task from Email</code> checkbox.

Setting	Description
Case Priority	The priority assigned to cases created from emails sent to this email routing address.
Case Origin	The value assigned to the Case Origin field for email sent to this email routing address.
Case Record Type	<p>The record type used to create cases from emails sent to this email routing address.</p> <p>This setting is not available if your organization does not use record types.</p> <p>The user in the Automated Case User field on the Support Settings page will automatically receive a notification if he or she does not have access to the selected case record type.</p>

- Click **Save** to save the routing address settings. Alternatively, click **Save & New** to save the routing address, and then create a new routing address.

You can only save routing addresses if a user is included in the Automated Case User field on the Support Settings page. To add a user to the Automated Case User field, click **Setup > Customize > Cases > Support Settings**.

A verification email is immediately sent to the new routing address which includes a link that you click to complete the verification process. The new routing address will not be verified until you open the email and click the link.

- Click the link in the verification email.

When the new email routing address is verified, it is listed as `Verified` in the Routing Addresses related list on the Email-to-Case Settings page. In addition, Salesforce.com automatically generates a unique email service address with which you configure your email system to forward case submissions. This email services address displays in the Routing Addresses related list on the Email-to-Case Settings page and on the detail page of a each routing address.



Tip: To send additional verification emails to a new routing address, go to the Routing Addresses related list on the Email-to-Case Settings page and click **Verify** next to the email address.

After verifying a routing address, click its name in the Routing Addresses related list to view its details, edit its settings, or clone new copies of it.

Configuring Email-to-Case Settings

To configure Email-to-Case settings:

- Click **Setup > Customize > Cases > Email-to-Case** to open the Email-to-Case settings page.
- Click **Edit**.
- As appropriate, set the following options:

On-Demand Email-to-Case Setting	Description
Notify Case Owners on New Email	Select this checkbox to allow case owners to automatically receive notifications when emails arrive for their existing cases. Email notifications assign a task to the case owner to respond to the new email when the Create Task from Email checkbox is selected. Responding to the email closes

On-Demand Email-to-Case Setting	Description
	the task. To disable email notifications at any time, simply deselect the checkbox.
Enable HTML Email	Select this checkbox to warn users before they view incoming HTML email content so that they can avoid opening potentially malicious HTML that could harm their computers. With this setting disabled, users will see text instead of HTML on email message detail pages, and when users reply to an email, the text version of the email will be copied to the email editor, instead of the HTML version. To disable HTML email warnings at any time, simply deselect the checkbox.
Email Subject	<p>Select this checkbox to add the thread ID to the subject of email.</p> <p>You can choose whether the thread ID should be included in the emails users send from cases. The thread ID is the unique ID of each case email, such as [ref:00DxRtp.500xXFKf:ref]. By default, the thread ID is added to both the subject and body of case emails.</p>
Email Body	<p>Select this checkbox to add the thread ID to the body of email.</p> <p>You can choose whether the thread ID should be included in the emails users send from cases. The thread ID is the unique ID of each case email, such as [ref:00DxRtp.500xXFKf:ref]. By default, the thread ID is added to both the subject and body of case emails.</p>
Over Email Rate Limit Action	<p>Choose what On-Demand Email-to-Case does with email that surpasses the daily email processing limit for your organization:</p> <ul style="list-style-type: none"> • Bounce message - The email service returns the message to the sender or to the Automated Case User for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message - The email service deletes the message without notifying the sender. • Requeue message - The email service queues the message for processing in the next 24 hours. If the message is not processed within 24 hours, the email service returns the message to the sender with a notification that explains why the message was rejected. <p>For more information on email processing limits, see Tips and Considerations for On-Demand Email-to-Case.</p>
Unauthorized Sender Action	If you limited the email addresses and domains available for On-Demand Email-to-Case in the <code>Accept Email From</code> field, choose what happens to messages received from senders who are blocked:

On-Demand Email-to-Case Setting	Description
	<ul style="list-style-type: none"> • Bounce message - The email service returns the message to the sender or to the Automated Case User for On-Demand Email-to-Case, with a notification that explains why the message was rejected. • Discard message - The email service deletes the message without notifying the sender.

4. Click **Save**.

Tips and Considerations for On-Demand Email-to-Case

Consider the following when setting up routing addresses for On-Demand Email-to-Case:

- A `Data Not Available` error displays if you have an [email service](#) named “EmailToCase.” If you have an email service named “EmailToCase,” and you wish to create routing addresses for On-Demand Email-to-Case, you must:
 1. [Rename the email service](#) from “EmailToCase” to another name.
 2. If the `Enable On-Demand Service` checkbox is selected for On-Demand Email-to-Case:
 - i. [Deselect Enable On-Demand Service](#).
 - ii. Click **Save**.
 - iii. Click **Edit** on the Email-to-Case settings page.
 - iv. Select `Enable On-Demand Service`.
 - v. Click **Save**.
- The following error message is sent to the [Automated Case User](#) after an email is converted to a case and a workflow rule attempts to add a field value to the case that surpasses field value limits:
`CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY: A workflow or approval field update caused an error when saving this record. Contact your administrator to resolve it. When this error occurs, any auto-response rules set up in your organization do not send a response to the user who sent the email. You can prevent similar errors from happening by deactivating the workflow rule.`
- When a customer sends an email to a routing address, a case is created in your organization with the email subject as the case `Subject` and the email body as the case `Description`.
- Salesforce.com limits the total number of messages that On-Demand Email-to-Case can process to 2500 email messages per day. Messages that exceed this limit are bounced, discarded, or queued for processing the next day, depending on how you configure [over email rate limit settings](#).
- [Apex email services](#) limits apply to On-Demand Email-to-Case.
 Text in an email that is over 100 KB is automatically truncated to 32 KB to fit a case record.
- The `Priority`, `Case Origin`, and `Case Record Type` fields auto-populate the case via the routing address settings when the routing address is included in either the `To`, `CC`, or `BCC` fields of an inbound email.
- Salesforce.com processes the routing address of an inbound email in the following order and stops at the first match:
 1. `To`
 2. `CC`

3. BCC

Note that some email applications do not automatically send BCC information. Therefore, case fields may not auto-populate properly if the routing address is included in the BCC field of an inbound email. Furthermore, an email may not convert to a case properly if you include the email services address in the BCC field of an email.

- If you use Microsoft Outlook® to redirect emails to a routing address:
 - The `CC Address` field may be blank on cases created from emails
 - Only one email address may be included in the `To` field of emails

This is because some versions of Outlook redirect emails with only one address in the `To` field and no addresses in the `CC` field. To prevent these issues, consider using Microsoft Exchange Server instead of Outlook to redirect emails to a routing address.

- To have cases that are created via On-Demand Email-to-Case automatically display in the Self-Service portal, see [Enabling Self-Service Features and Settings](#) on page 1122.
- Deselect both the `Email Subject` and `Email Body` checkboxes to prevent the thread ID from being added to email.

If you deselect both the `Email Subject` and `Email Body` checkboxes, then all incoming responses to outbound case emails create new cases.

- If there is an error processing an email to a case via a routing address, then a notification is sent to the user who created the routing address.
- If email is sent to a routing address or email services address when On-Demand Email-to-Case is disabled, then a notification is sent to the user who created the routing address.
- When you reply to email messages in the Email related list on cases, the `From:` field on your email may display to recipients as `no-reply@salesforce.com` or `support@company.com`. This is due to how the recipients' email applications receive `Sender` and `From` headers on inbound email. By default, an `Enable Sender ID compliance` setting is selected for your organization, which enables email messages sent from `Salesforce.com` to comply with email applications that require `Sender` headers for delivery. For more information, see [Configuring Deliverability Settings](#) on page 776.

See Also:

[Creating Workflow Rules](#)

[Setting Up Auto-Response Rules](#)

Enabling Public Solutions

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

User Permissions Needed

To enable web access to solutions:

“Customize Application”

Using the Solutions tab, your customer support team can create solutions that people outside of your organization may find helpful. Using HTML code supplied by Salesforce.com, and with the help of your website administrator, you can add a search box and button to your website that allows your customers to search for solutions. This functionality is known as Public Solutions.