

Email To Case (E2C) Advance

CONSISTENT SUPPORT WORKFLOWS. SIMPLIFIED CASE MANAGEMENT. DELIGHTED AGENTS & CUSTOMERS

Many support agents suffer from click fatigue. The constant sifting through email records and typing the same message over and over contributes largely to it. The standard 'Email-to-Case', provided by Salesforce, doesn't solely enable the right arrangement of data for easy access, review, and action.

Hence, Grazitti developed Email To Case Advance (E2CA). E2CA enhances the standard functionality and offers many features that your support team wished were part of Salesforce Email-to-Case.

With E2C Advance, your support agents can

- **View Cleaned Emails and Case Comments :** E2CA places the email text, including the subject and attachments (if any) into the 'Advance Case Comments' section for greater visibility. You can enable this for Incoming Emails, Outgoing Emails and Both.
- **Notify People in CC and BCC :** Select scenarios such as case creation, new case comments, or case closures to notify additional recipients. You can send notifications to people in CC and BCC and also restrict some senders and recipients by blocking their domains and email addresses.
- **Send Help With Confirmation Emails :** E2CA analyzes customer emails, identifies keywords, digs into your connected knowledge bases to find relevant articles, and shares those along with confirmation emails.
- **Prevent Email Looping :** When two servers are stuck in an infinite loop of replies and counterreplies due to automated email exchanges, E2CA springs into action.

Benefits

- Streamlined support workflows
- No click fatigue for support reps
- Lower to no employee churn
- Better customer engagement
- Delighted customers

- **Create Cases from Emails Forwarded by Employees :** E2CA transforms forwarded customer emails from employees into cases, attributing them to the customer rather than the employee. Additionally, email forwards can be authorized based on profile ID.
- **Handle Non-Customer Emails :** Select from four actions-
 - a) Don't create a case
 - b) Create a case, immediately close it, and notify the sender
 - c) Create a case and add the person to the contacts list
 - d) Create a case and add the person into Leads
- **Handle Multiple Case Attachments :** Enable Salesforce Classic users to share multiple attachments simultaneously in TXT, PDF, or JPG format.
- **Use the Advanced Case Comments Screen :** Insert comments, make them public or private, update case fields—like status and priority—and add multiple attachments. E2CA extracts data from these fields and appends it to the emails your support reps send.
- **Configure and Customize Email Templates :** Choose from a set of predefined email templates and customize them to match your needs. Support reps' replies will be shared in the customized templates.
- **Manage Duplicate Cases :** Select whether to mark a case as a duplicate or simply delete it. In both scenarios, you have to select a case as a master case and the remaining will be either deleted or marked as a copy.
- **Handle Responses to Closed Cases :** Select the next action: reopen the case, create a new case, or take no action. E2CA enables you to reopen a case if a customer emails within a set period and create a new case if the specified time has passed.
- **Avail Canned Comments :** These are comments that can be used to answer commonly known and frequently asked questions to save your support agents time and effort.
- **View Case Conversations With Comment Timeline :** Check comments on a case with the quick add comment option, a public/private button to create comments, and a search box to find comments. Additionally, enable display case history along with pagination.
- **Create Draft Comments :** Create and schedule draft comments from the Add Case Comment page. The drafts are also auto-saved.
- **Add Case Comment Page :** Add/remove/search recipients, view/add attachments, preview comments as emails, and merge Case fields in Canned comments. You can also add Exclude list emails/domains in the recipient list and enable warning messages.