

How to: receive updates for Case Owner when emailed (AppExchange)

Problem: Cases are falling through the cracks because agents aren't receiving notifications when customers email back with an update.

Solution: Custom notifications, a new feature in the Summer Release, provides real-time notifications to agents right in the console and mobile app. Agents can respond immediately and keep your customers happy!

Sister Quip: [How to: receive updates for Case Owner when Posted on a Community \(AppExchange\)](#)

How to:

JUST INSTALL THIS PACKAGE: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2K000000YBA8>

- Creates two Process Builders that notify the Case Owner (users not queues) of both an inbound email and a Community post from a customer on a Case.
- The process builders are named
 - 1) *Community Case Post - Case Owner Notifier
 - 2) * Inbound Email - Case Owner Notifier

Or do it manually below...

1) Go to Setup → Notification Types

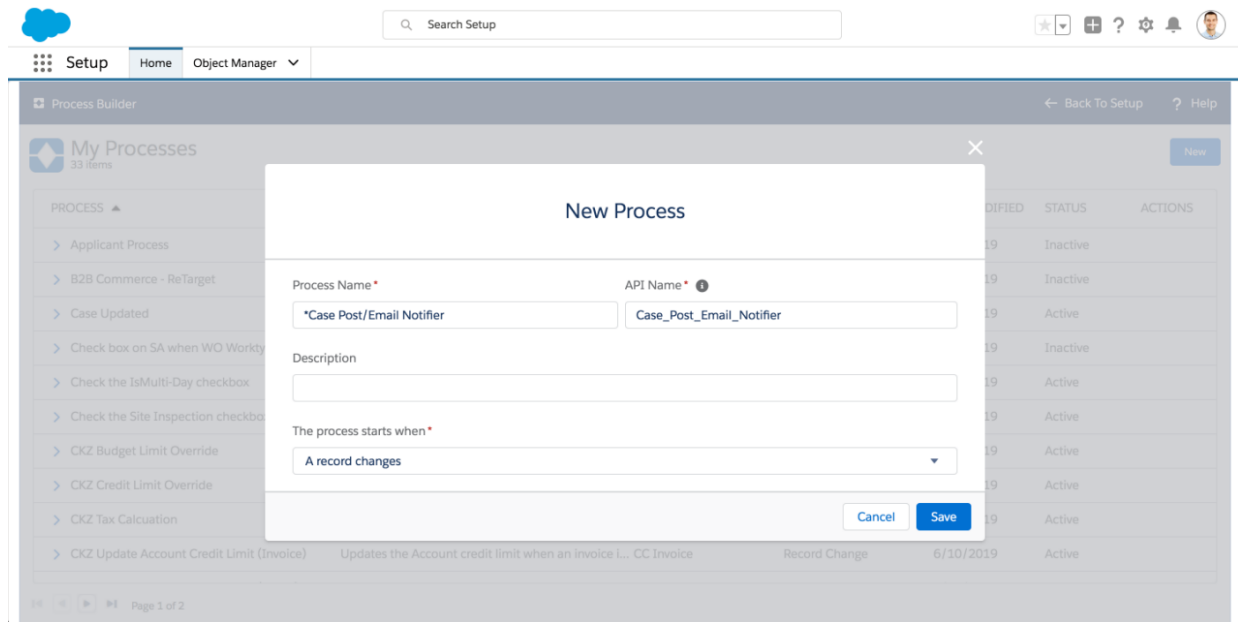
Create new one and make it work for both Desktop and Mobile.

The screenshot shows the Salesforce Setup interface. At the top, there's a banner about Lightning Labs moving to the official Salesforce Chrome account. Below that, the 'Setup' menu is open, and 'Notification Types' is selected. The main content area shows the 'Notification Types' page with a 'New' button and a table of existing notification types.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Custom notification	Custom_notification		✓	✓

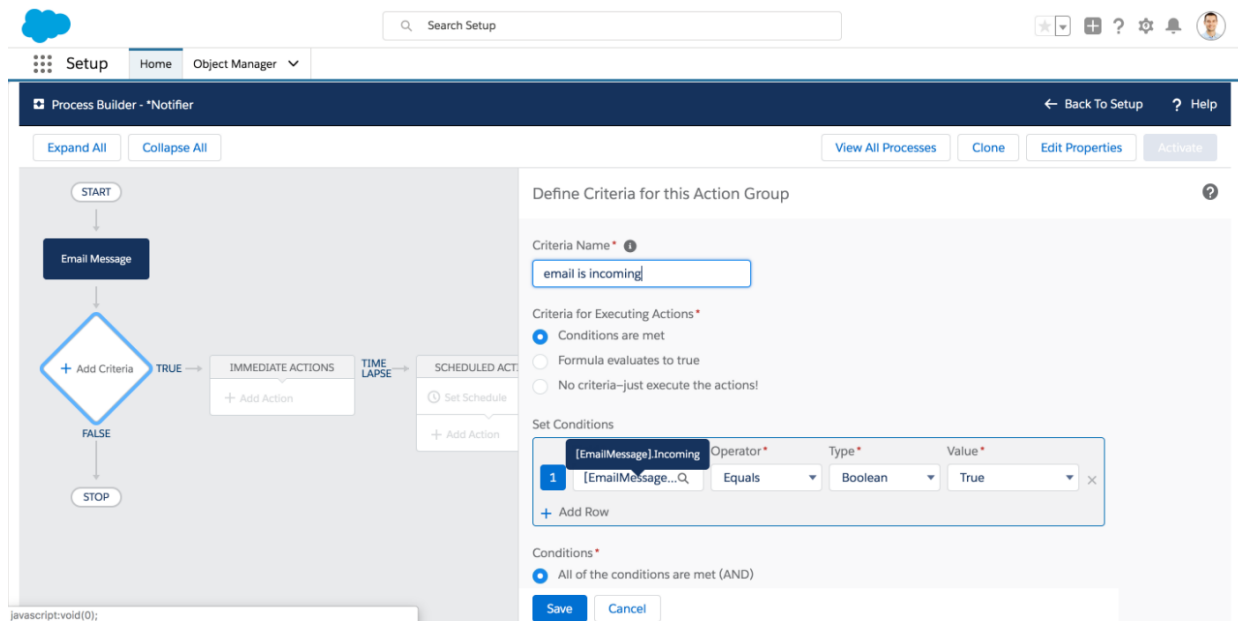
2) Go to Setup → Process Builder → New

Name it what you would like. Process starts when "A record changes." Save.



3) Object: Email Message

4) Criteria: EmailMessage.incoming | Equals | Boolean | True



5) 2nd Criteria: Case Owner ID | Starts with | 005

(This second criteria makes sure the Case Owner is a User since User ID's always start with 005. We wouldn't want the Queue being notified too!)

Select a Field

EmailMessage ▶ Case ID ▶ Owner ID

You have selected the following field:



Owner ID

Type: ID

API Name: OwnerId

Cancel

Choose

Define Criteria for this Action Group

Criteria Name * 

email is incoming

Criteria for Executing Actions *

- ☒ Conditions are met
- ☐ Formula evaluates to true
- ☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[EmailMessage...Q	Equals ▼	Boolean ▼	True ▼	×
2	[EmailMessage...Q	Starts with ▼	ID ▼	005	×
+ Add Row					

Conditions *

- ☒ All of the conditions are met (AND)
- ☐ Any of the conditions are met (OR)
- ☐ Customize the logic

6) Immediate Actions

Action Name: Send notification to Case Owner

Notification Type: Custom Notification

Notification Recipient: Owner

Notification Title: Update on Case: {[EmailMessage].Subject}

Notification Body: {[EmailMessage].TextBody}

View All Processes

Clone

View Properties

Deactivate

Read Only ⓘ

Send Custom Notification ⓘ

Action Name * ⓘ

Send notification to Case Owner

Notification Type *

Custom notification ▼

To create a new notification type, go to Notification Types in [Setup](#).

Notification Recipient *

Owner ▼

[EmailMessage].Parent.Owner-Id

[EmailMessage].Parent.... Q

Notification Title *

Update on {![EmailMessage].Subject}

Notification Body *

{![EmailMessage].TextBody}

Target Object *

EmailMessage

 Object that started the process

Save.

Activate. (the big blue button in the top right)

7) See it in action



Notifications

[Mark all as read](#)



Update on Re: Test for notification [ref:_00D2KomDa._5002KfWh5i:ref]

Does it really work?

On Mon, Jul 15, 2019 at 11:58 AM Lauren Bailey <lboyle1337@gmail.com> wrote:

> Yes, thank you very much!!!!

>

> On Mon, Jul 15, 2019 at 11:57 AM emailtocase1337@gmail.com <

> emailtocase1337@gmail.com> wrote:

>

>> Does this answer your question?

>>

>>

>> ----- Original Message -----...

a few seconds ago •