



Email-to-Case: Where It Works, Where It Breaks

Why enterprise Service Cloud teams add GOAT Email on top of E2C

GOAT Email by Quadrix | goatemail.com | 100% Salesforce-Native

Email-to-Case is a solid foundation. It brings email into Salesforce, creates cases, and connects communication to records. For smaller teams with straightforward workflows, it often works well enough. But as volume grows, shared inbox complexity increases, and security expectations tighten, **E2C starts showing its limits**. This document maps exactly where those limits are and how GOAT Email fills the gaps - not as a replacement, but as a **governance layer on top of what you already have**.

What Email-to-Case Does Well

✔ Case creation from email

Inbound emails automatically create cases - this works and GOAT doesn't replace it

✔ Basic email-to-record linking

Emails attach to cases via threading - straightforward for simple workflows

✔ Native Salesforce feature

No additional cost, no installation, available in every Service Cloud org

✔ Standard routing rules

Basic assignment rules route cases to queues based on simple criteria

Where Email-to-Case Breaks Down

✖ Shared Inbox Management

No governed shared inbox model. Multiple agents on the same mailbox have no ownership, assignment, or visibility into who is handling what. Emails are consumed, not managed.

✖ Email Thread Ownership

No thread-level accountability. Once a case is created, there is no way to assign, transfer, or track ownership at the email-thread level. Threads get lost between shifts.

✖ Security and Visibility Controls

No thread-level access control. Every agent with case access sees every email — a compliance gap for regulated industries (finance, healthcare, travel).

⚠ Inbox Security Layer

Limited native inbound filtering. Phishing attempts, spam, and risky attachments can land directly in agent queues unless filtered upstream by external tools.

⚠ Analytics & Delivery Tracking

No outbound tracking. No visibility into delivery, opens, clicks, or per-thread response time. SLA dashboards on email interaction are not available.

⚠ Customization Ceiling

Rigid routing rules. Routing by email content, sender domain, language, urgency, or business unit requires custom Apex/Flow that becomes fragile at scale.

Business impact when these limits surface

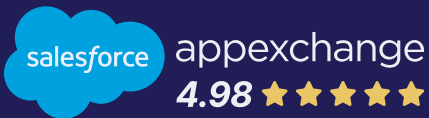
- **Slower response times** — agents searching for thread context across cases.
- **Missed SLAs** — no thread-level SLA tracking; problems are visible only at case level, often too late.
- **Accountability gaps** — handovers between shifts and agents go untracked.
- **Operational overhead** — manual workarounds and Apex/Flow custom code accumulate as tech debt.
- **Onboarding complexity** — new agents cannot see who handles what or learn from prior threads.
- **Compliance exposure** — sensitive emails visible to anyone with case access; no audit trail at the email level.



GOAT Email: The Governance Layer on Top of E2C

What changes when you add GOAT Email to your existing Service Cloud setup

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GOAT Email does not replace Email-to-Case. Your cases still get created the same way. What GOAT adds is everything that happens around that email – ownership, routing, security, analytics, and control. Think of it as the operating layer for email that E2C was never designed to be.

Side-by-Side: E2C Alone vs. E2C + GOAT

Capability	Email-to-Case Only	E2C + GOAT Email
Case creation	Automatic from inbound email	Same - GOAT doesn't change this
Shared inbox management	No governance model	Governed shared mailboxes with ownership, routing, assignment
Email thread ownership	Case-level only, no thread tracking	Thread-level ownership, transfer, and accountability
Visibility / access control	All-or-nothing per case	Thread-level, label-based, role-based visibility controls
Phishing protection	None - all emails enter queues	Security layer filters malicious emails before agents see them
Outbound email tracking	No delivery/open/click data	Full analytics: delivery, opens, clicks, response time
SLA measurement	Case-level only	Email-level SLA tracking with dashboards
Routing complexity	Basic rules, rigid	Flow-based, content-aware, multi-criteria routing
Seasonal scaling	Manual process changes	Rules-based scaling, no added headcount
Audit trail	Case history only	Immutable email records with full audit trail
Reporting / dashboards	Case metrics only	Email volume, response time, agent performance, delivery rates
Agent experience	Standard case feed	Global Inbox, Smart Inbox, threaded views inside Salesforce

Key Insight

The best time to add GOAT is during E2C rollout - not after problems surface in production. You avoid rework and set the right foundation from day one.



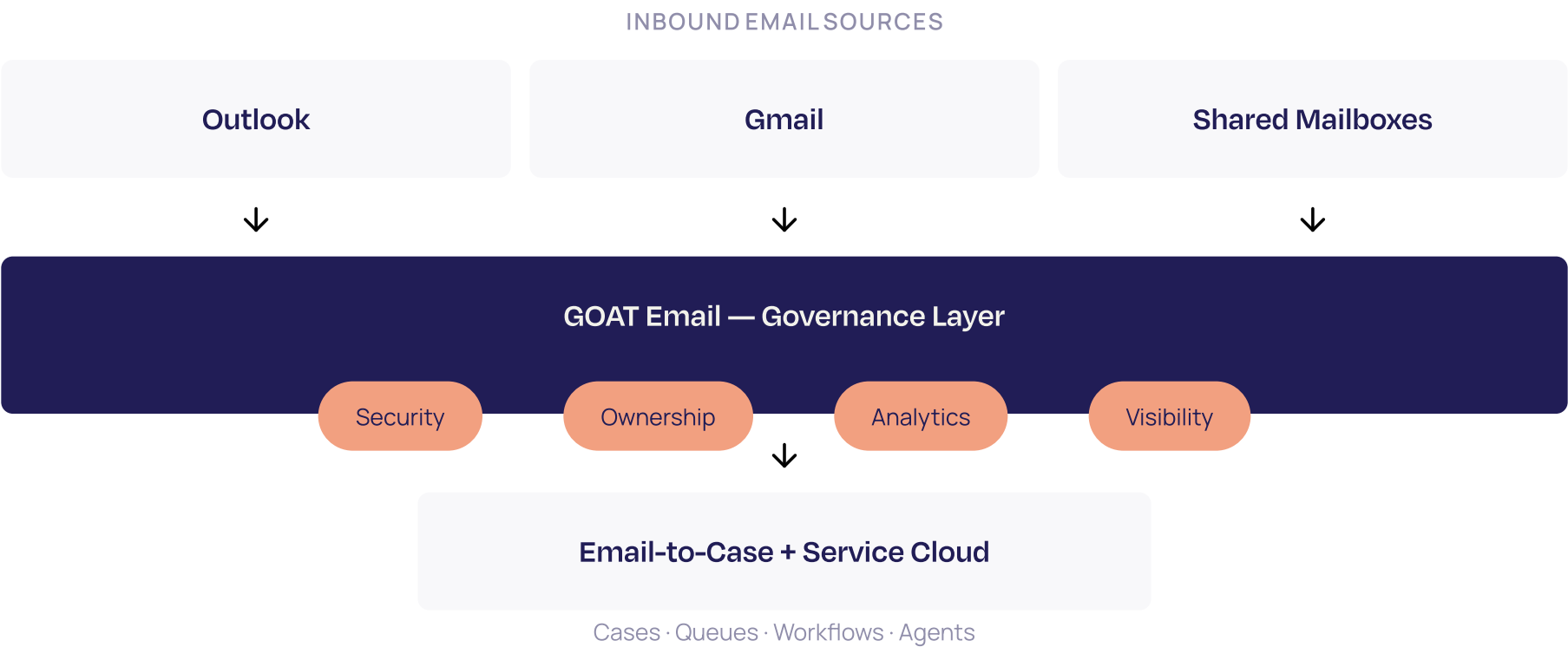
Architecture, Enterprise Proof, and Next Steps

How GOAT layers onto Service Cloud without disrupting your E2C setup

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 **appexchange**
4.98 ★★★★★

How It Works Together



What Doesn't Change

- ✓ Email-to-Case continues to create cases exactly as before
- ✓ Your existing case queues, assignment rules, and escalations remain untouched
- ✓ Agents still work in Service Cloud - GOAT lives inside Salesforce, not alongside it
- ✓ No external servers, no data leaving Salesforce, no new security surface

What Changes

- 🔄 Shared inboxes get structure: ownership, assignment, routing, SLA tracking
- 🔄 Inbox security layer filters risky email before agents see it
- 🔄 Thread-level visibility lets you restrict sensitive emails by role
- 🔄 Full email analytics — delivery, opens, clicks, response times
- 🔄 Audit trail covers every email, not just case history

Enterprise Teams Using E2C + GOAT

 **Tech**

Secure Inbox on top of Service Cloud. Thread-level visibility controls for regulated communications. E2C handles case creation, GOAT governs email access and audit trail.

 **Energy**

Replaced EAC, added GOAT for department-level email controls, sender restrictions, and cross-object email linking. E2C + GOAT working together.

 **Design/Manufacturing**

Enterprise email governance across customer service and operations. Shared mailbox structure, thread ownership, and audit trail layered onto an existing Service Cloud setup.

 **Gaming/Tech**

Shared mailboxes with predefined rules, email-to-case integration, tracking opens/clicks. GOAT added structure to their E2C workflows.

Recommended Approach

1

Continue your E2C rollout

Nothing changes in your current plan

2

30-min exploratory call

We map where E2C limits will surface based on your setup

3

Sandbox trial alongside E2C

Test GOAT governance layer with real emails, zero risk

4

Deploy together

E2C handles case creation, GOAT handles everything around it

Ready to explore?



Sandbox trial:
2 weeks free



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