

High Volume Case Responder Featuring Rapid Response Email with Knowledge Sharing Installation Guide

Document Version 3.0

Preface

This Installation Guide includes instructions for Service Cloud Console users and Non-Service Cloud Console Users. Once you know which user you are, please see the Table of Contents for the correct section of the Installation Guide you should follow.

To learn more about Service Cloud Console click [here](#).

Table of Contents

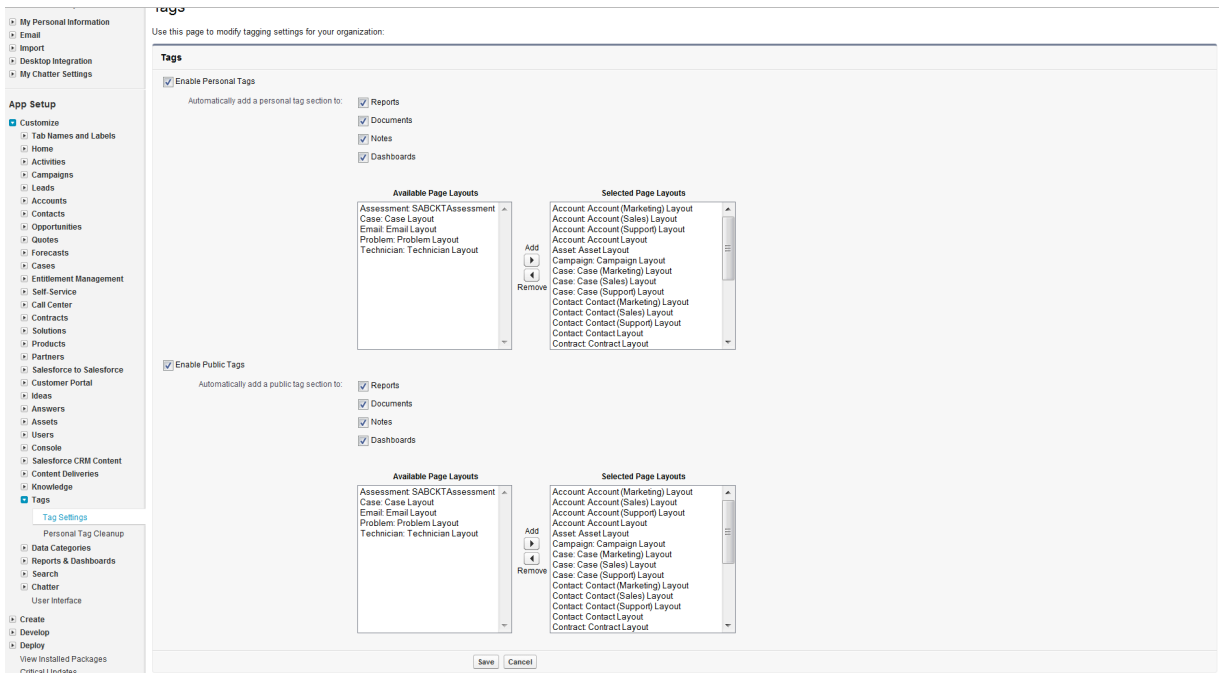
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Section I. Deployment Steps for Service Cloud Console Users

Pre-Deployment Steps

Configuration

1. Enable Public and Personal Tags
 - a. Go to **Setup > App Setup > Customize > Tags > Tag Settings**
 - b. Enable both Public and Personal Tags
 - c. Click Save



2. Go back to AppExchange and click on the Get It Now button
 - a. **Note:** If the installation fails, you may need to check the box to "Ignore Apex test failures that may cause the installed application not to function properly".

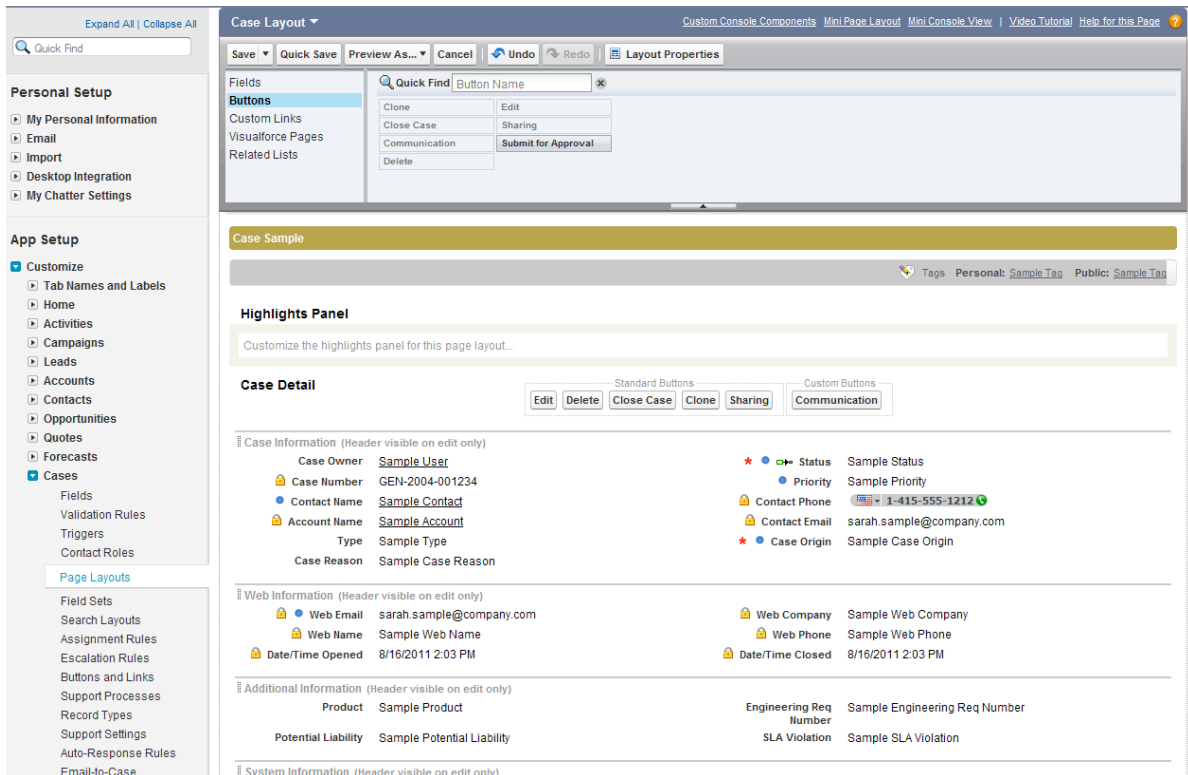
Post-Deployment Steps

Configuration

Note: Before getting started, please add the System Administrator to the Rapid Response Email licensed users. Go to **Setup > App Setup > View Installed Packages** and click on manage licenses next to the Rapid Response Email Application.

To apply a default configuration go to the High Volume Case Responder Setup Wizard and follow the instructions. Go to Setup > App Setup > View Installed Packages and click on Configure next to the High Volume Case Responder Application. Otherwise for more instructions and details, follow these steps:

1. Add the Communication Button to the Case Page Layout
 - a. Go to **Setup > App Setup > Customize > Cases > Page Layout**
 - b. For each page layout that should provide access to High Volume Case Responder, follow the steps below
 1. Click Edit next to the Page Layout Name
 2. Select Buttons in the layout manager
 3. Drag the Communication button to the Custom Buttons section
 4. Click Save



The screenshot displays the Salesforce 'Case Layout' configuration page. On the left, a sidebar contains navigation links for 'Personal Setup', 'App Setup', and 'Page Layouts'. The 'Page Layouts' section is expanded, showing 'Case Sample' as the selected layout. The main content area shows the 'Case Sample' layout configuration. At the top, there's a 'Buttons' section with a 'Quick Find' bar and a list of buttons: 'Clone', 'Edit', 'Close Case', 'Sharing', 'Communication', and 'Submit for Approval'. Below this, the 'Case Detail' section is visible, showing a 'Highlights Panel' and a 'Case Information' section with fields like Case Owner, Case Number, Contact Name, Account Name, Type, and Case Reason. The 'Web Information' section includes fields for Web Email, Web Name, Date/Time Opened, Web Company, Web Phone, and Date/Time Closed. The 'Additional Information' section includes fields for Product, Engineering Req Number, Potential Liability, and SLA Violation.

2. Module Settings
 - a. Go to **Setup > App Setup > Develop > Custom Settings**

Expand All | Collapse All

Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution *New!*
API
Components
Custom Settings
Email Services
Pages
Sites
Static Resources
Tools
Remote Access
Deploy
Installed Packages
AppExchange Marketplace *New!*
Critical Updates
Administration Setup
Manage Users

Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: All [Create New View](#)
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Business Logic Setting	Public	Hierarchy	SCCA01		110	0	0
Manage	Categorization Settings	Public	List	SCCA01	Settings related to categorizing entities.	355	0	0
Manage	Communication Template Folder Settings	Public	List	SCCA01	Settings to identify Templates and Snippets. Maps 'Template_#' or 'Snippet_#' to folders that house Templates or Snippets.	355	0	0
Manage	Custom Email Disposition Actions	Public	List	SCCA01	Custom email send disposition actions	1,120	0	0
Manage	Email Preferences	Public	Hierarchy	SCCA01		660	0	0
Manage	Folder Settings	Public	List	SCCA01	Folder Metadata	365	0	0
Manage	High Vol. Case Responder Module Settings	Public	Hierarchy	SCCA01	High Vol. Case Responder Module Settings	250	0	0
Manage	Integration Configuration	Public	Hierarchy	SCCA01	Stores information about systems integrated with this product, such as KB systems.	680	0	0
Manage	LimitSetting	Public	Hierarchy	SCCA01		104	0	0
Manage	Platform Article Types	Public	List	SCCA01	Platform article types. The name should include the article type suffix '___kav'.	110	0	0
Manage	Routing Settings	Public	Hierarchy	SCCA01	Settings related to routing objects, assigning objects	885	0	0
Manage	System Email Settings	Public	List	SCCA01	System Email Settings	355	0	0
Deleted Objects (2)								

Show me [fewer](#) records per list page

b. Click the Manage link next to High Vol. Case Responder Module Settings

Expand All | Collapse All

Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings
App Setup
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution *New!*
API
Components
Custom Settings
Email Services
Pages
Sites
Static Resources
Tools
Remote Access
Administration Setup
Manage Users

Custom Setting

High Vol. Case Responder Module Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

▼ Default Organization Level Value

View: All [Create New View](#)
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Setup Owner	Location
No records to display.	

- Click the New button
- Check the Rapid Response Email Management and Primary Enabled checkboxes.

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution *New!*
 - API
 - Components
 - Custom Settings
- Email Services
- Pages
- Sites
- Static Resources
- Tools
- Remote Access
- Deploy
 - Installed Packages
 - AppExchange Marketplace *New!*

High Vol. Case Responder Module Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit High Vol. Case Responder Module Settings [Save] [Cancel]

High Vol. Case Responder Module Settings Information ! = Required Information

Location

Rapid Response Email Management ☒

Customer Insight and Support Overview ☐

Development Mode ☐

KT Situational Appraisal ☐

KT Problem Analysis ☐

Multi-Level Escalations ☐

KCS Coaching and Assessments ☐

KCS Knowledge Capture ☐

KT Coaching and Assessments ☐

Primary Enabled ☒

Relevant Information ☐

Next Generation Skills-Based Routing ☐

Unified Communications View ☐

Investigation & Notification Teams ☐

Non-console, open URLs in new window ☐

- e. Click Save
3. Email Preferences
 - a. Go to **Setup > App Setup > Develop > Custom Settings**
 - b. Click the Manage link next to Email Preferences

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution *New!*
 - API
 - Components
 - Custom Settings
- Email Services
- Pages
- Sites
- Static Resources
- Tools
- Remote Access

Custom Setting: Email Preferences

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[New]

▼ Default Organization Level Value

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

[New]

Setup Owner	Location
No records to display.	

- c. Click the New button
- d. Check the Allow CC/BCC, Show From Field, and Show View All Emails Button checkboxes
- e. Click Save

Expand All | Collapse All
Quick Find

Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings

App Setup
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution *New!*
API
Components
Custom Settings
Email Services
Pages
Sites
Static Resources
Tools
Remote Access
Deploy
Installed Packages
AppExchange Marketplace *New!*
Critical Updates

Email Preferences Edit

Provide values for the fields you created. This data is cached with the application.

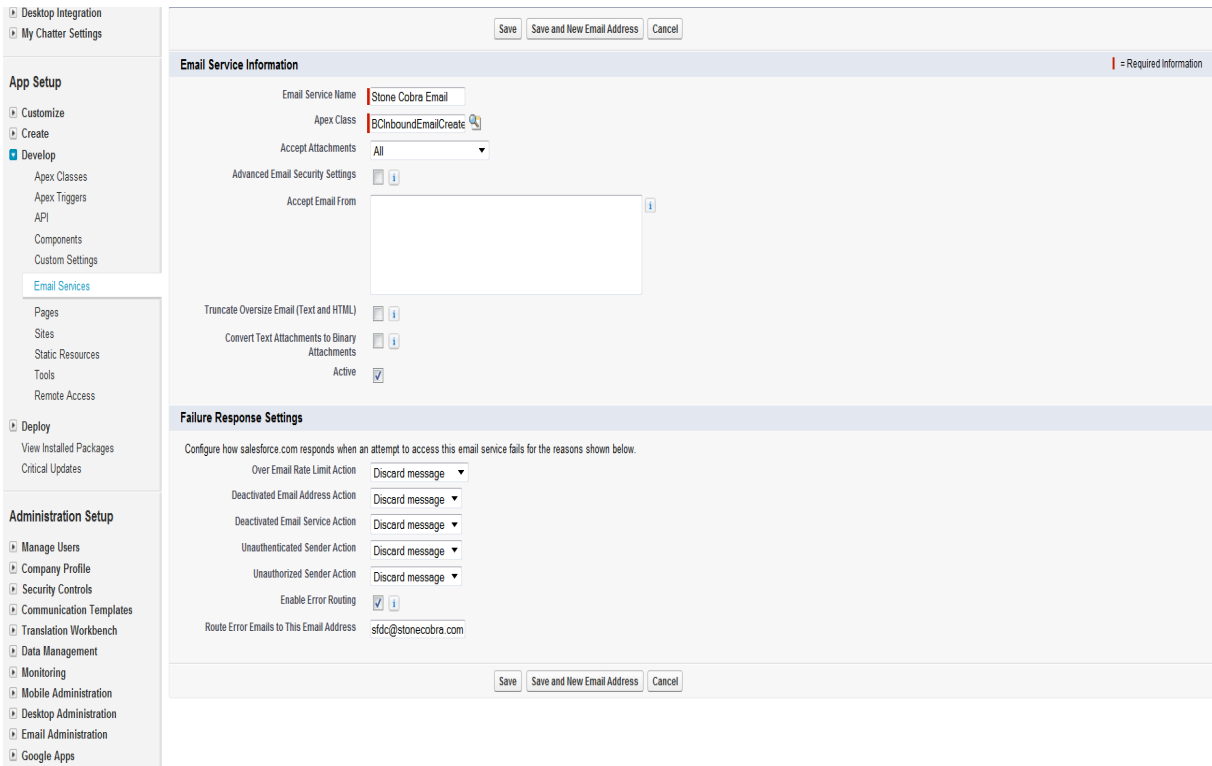
Edit Email Preferences
Save Cancel

Email Preferences Information
= Required Information

Location
Allow CC/BCC ☒
Communication activities limit 150
Compatibility Mode ☐
Legacy Template/Snippet naming & folders ☐
Enable Save All Functionality ☐
KCS Create on Email Page ☐
KCS Search on Email Page ☐
Open Oldest Case(Unchecked Open Newest) ☒
Show From Field ☒
Show OOB Disposition Actions ☒
Show View All Emails Button ☒
Template Snippet Match on Description ☐
Timeline Force Initialization ☐
Use Article Management Platform Links ☐
Account From Field
Include Previous Email in Reply ☒
Snippets Folder Snippets
Templates Folder Templates

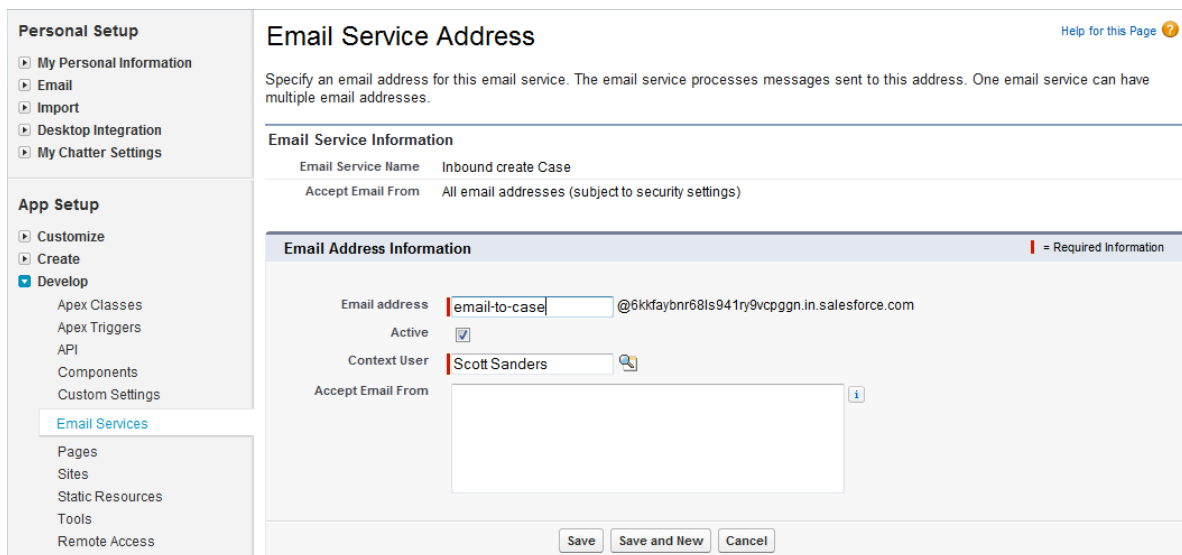
4. Add an Email Service

- Go to **Setup > App Setup > Develop > Email Services**
- Click the New Email Service button
- Enter Stone Cobra Email for the Email Service Name
- In the Apex Class lookup field, choose BCInboundEmailCreateCase
- In the Accept Attachments dropdown, choose All
- Check the Active checkbox
- Check the Enable Error Routing checkbox
- Enter sfdc@stonecobra.com in the Route Error Emails to This Email Address box
- Click the Save and New Email Address button



The screenshot shows the Salesforce Email Service Setup page. The left sidebar contains navigation menus for Desktop Integration, My Chatter Settings, App Setup (Customize, Create, Develop, Deploy), and Administration Setup. The main content area is titled 'Email Service Information' and includes fields for Email Service Name (Stone Cobra Email), Apex Class (BCInboundEmailCreate), Accept Attachments (All), Advanced Email Security Settings, Accept Email From (empty text box), Truncate Oversize Email (Text and HTML), Convert Text Attachments to Binary Attachments, and Active (checked). Below this is the 'Failure Response Settings' section, which includes dropdowns for Over Email Rate Limit Action, Deactivated Email Address Action, Deactivated Email Service Action, Unauthenticated Sender Action, and Unauthorized Sender Action, all set to 'Discard message'. It also has checkboxes for Enable Error Routing (checked) and a field for Route Error Emails to This Email Address (sfdc@stonecobra.com). Buttons for Save, Save and New Email Address, and Cancel are at the top and bottom.

- j. Enter email-to-case in the Email Address field
- k. Remove all text from the Accept Email From text box
- l. Click Save



The screenshot shows the Salesforce Email Service Address page. The left sidebar contains navigation menus for Personal Setup (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings), App Setup (Customize, Create, Develop, Deploy), and Administration Setup. The main content area is titled 'Email Service Address' and includes a description: 'Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.' Below this is the 'Email Service Information' section with fields for Email Service Name (Inbound create Case) and Accept Email From (All email addresses (subject to security settings)). The 'Email Address Information' section includes fields for Email address (email-to-case @6kkfaybnr68ls941n9vcpqgn.in.salesforce.com), Active (checked), Context User (Scott Sanders), and Accept Email From (empty text box). Buttons for Save, Save and New, and Cancel are at the bottom.

5. Enable email round tripping
 - a. **Note:** the Reply To address when sending an email is equal (in the Application) to the From Address, therefore an Organization-Wide Address needs to be set
 - b. Go to **Setup > Administration Setup > Email Administration > Organization-Wide Addresses**

- c. Add a new address
 1. **Note:** a new external email address needs to be set for routing or it is possible to use the email address that was generated by the email services. If the second option is chosen then a new case will be created with an email containing the verification URL.
 2. Click Add
 3. Enter the Display Name
 4. Enter the email address
 5. Select the profiles that should be able to use this address. All profiles must have access to a from address in order to use the application
 6. Click Save

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration**
 - Deliverability
 - Organization-Wide Addresses
 - Compliance BCC Email
 - Test Deliverability

Edit Organization-Wide Email Addresses Help for this Page ?

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Organization-Wide Email Address ! = Required Information

Display Name

Email Address

☒ Allow All Profiles to Use this From Address
☐ Allow Only Selected Profiles to Use the From Address

Profiles

System Administrator
 Solution Manager
 Read Only
 Custom: Sales Profile
 Custom: Marketing Profile
 Custom: Support Profile
 Marketing User
 Contract Manager
 Standard User
 Standard Platform User

6. Configure Templates and Snippets Folders
 - a. Go to **Setup > App Setup > Develop > Custom Settings**
 - b. Click Manage next to Communication Template Folder Settings

Expand All | Collapse All
Quick Find

Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings

App Setup
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution *New!*
API
Components
Custom Settings
Email Services
Pages
Sites
Static Resources
Tools
Remote Access

Custom Setting
Communication Template Folder Settings
[Help for this Page](#)

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New

Name +
No records to display.

- c. Click the New button
- d. Use the following values:
 1. Name: Snippet
 2. Folders: Snippets

Expand All | Collapse All
Quick Find

Personal Setup
My Personal Information
Email
Import
Desktop Integration
My Chatter Settings

App Setup
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution *New!*
API
Components
Custom Settings
Email Services
Pages
Sites
Static Resources
Tools
Remote Access

Custom Setting
Communication Template Folder Settings Edit
[Help for this Page](#)

Provide values for the fields you created. This data is cached with the application.

Edit Communication Template Folder Settings
Save Save & New Cancel

Communication Template Folder Settings Information ! = Required Information

Name Snippet
Folders Snippets

- e. Click Save & New
- f. Use the following values:
 1. Name: Template
 2. Folders: Templates
- g. Click Save

Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution New!
 - API
 - Components
- Custom Settings
- Email Services
- Pages
- Sites
- Static Resources
- Tools
- Remote Access

Communication Template Folder Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Communication Template Folder Settings Save Save & New Cancel

Communication Template Folder Settings Information ! = Required Information

Name	Template
Folders	Templates

Platform Knowledge Configuration(Optional)

7. Enable Platform Knowledge (Optional)

- a. Go to **Setup > Administration Setup > Manage Users > Users** to ensure the system administrator is selected as a Knowledge User
- b. If the checkbox next to Knowledge User is not checked:
 1. Click the Edit button
 2. Check the Knowledge User Checkbox
 3. Click Save
- c. Add an article type:
 1. Go to **Setup > App Setup > Customize > Knowledge > Article Types**

Personal Setup

- My Personal Information
- Personal Information
 - Change My Password
 - Reset My Security Token
 - My Groups
 - Change My Display
 - Grant Login Access
 - Calendar Sharing
 - Reminders
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
 - View Installed Packages
 - Critical Updates

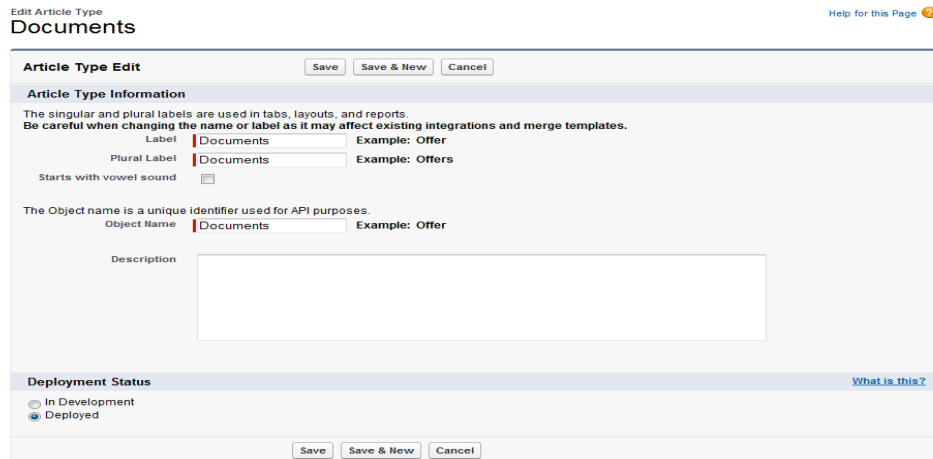
User
Scott Sanders Edit Layout | User Profile

Personal Groups (0) | Public Group Membership (0) | Queue Membership (4) | Managers in the Role Hierarchy (0) | Remote Access (0) | Login History (10+)

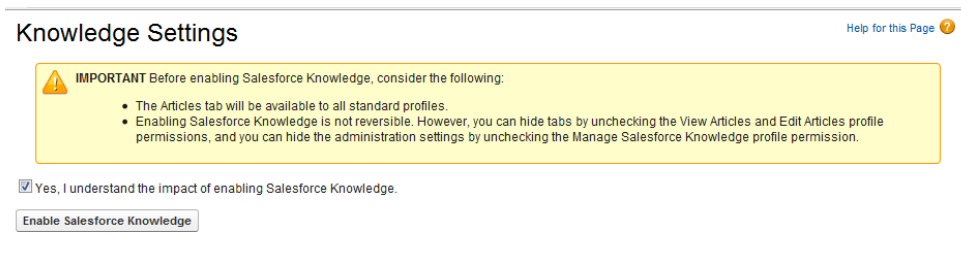
User Detail Edit Change Password

Name	Scott Sanders	Role	
Alias	SSand	User License	Salesforce
Email	ssfc@stonecobra.com	Profile	System Administrator
Username	ca-ua01@stonecobra.com	Active	☒
Community Nickname	ca-ua011.2893637465941055E12	Marketing User	☒
Title		Offline User	☒
Company	Stone Cobra	Knowledge User	☒
Department		Service Cloud User	☒
Division		Mobile User	☒
Address	CA 95768 US	Mobile Configuration	
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)	Accessibility Mode	☐
Locale	English (United States)	Color-Blind Palette on Charts	☐
Language	English	Send Apex Warning Emails	☐
Delegated Approver		Development Mode	☐
Manager		Show View State in Development Mode	☐

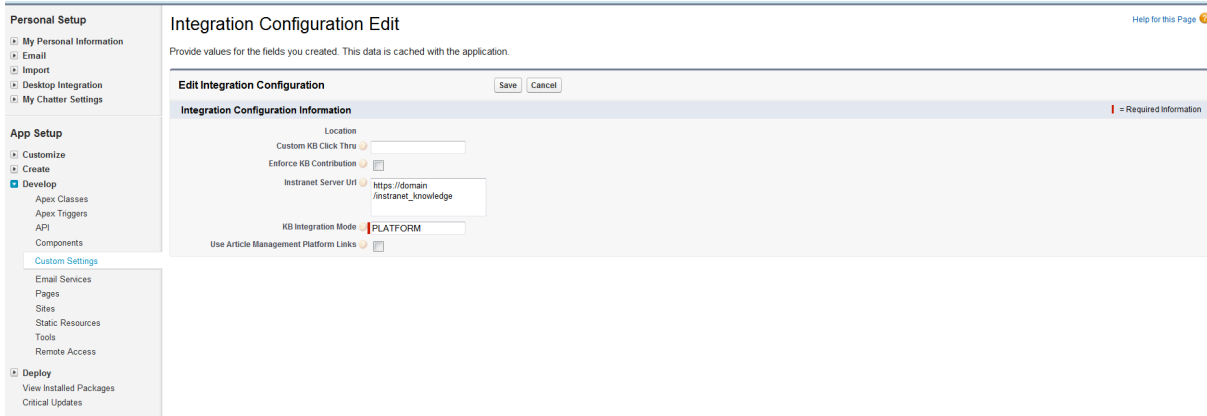
2. Click New Article Type
3. Enter the label, plural label, and object name
4. Choose the deployment status
 - a. Note that only article types that have been marked as deployed will appear in the application
5. Click Save



- d. Enable Salesforce Knowledge
 1. Go to **Setup > App Setup > Customize > Knowledge > Settings**
 - a. Check the "Yes, I understand the impact of enabling Salesforce Knowledge" checkbox
 - b. Click Enable Salesforce Knowledge
 - c. Click OK

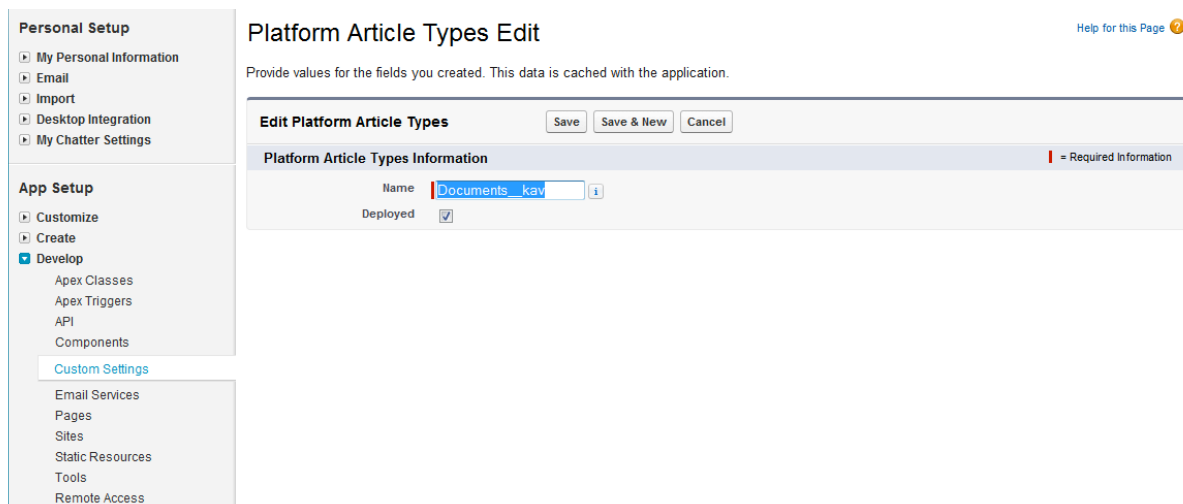


6. Set the Platform Knowledge as the Application knowledge. **(Optional)**
 - a. Go to **Setup > App Setup > Develop > Custom Settings**
 - b. Click the Manage link next to Integration Configuration
 - c. Click the New button
 - d. Fill in the appropriate Intranet Server URL or leave as default if not applicable
 - e. Enter PLATFORM in the KB Integration Mode field
 - f. Click Save



7. Article types. (Optional)

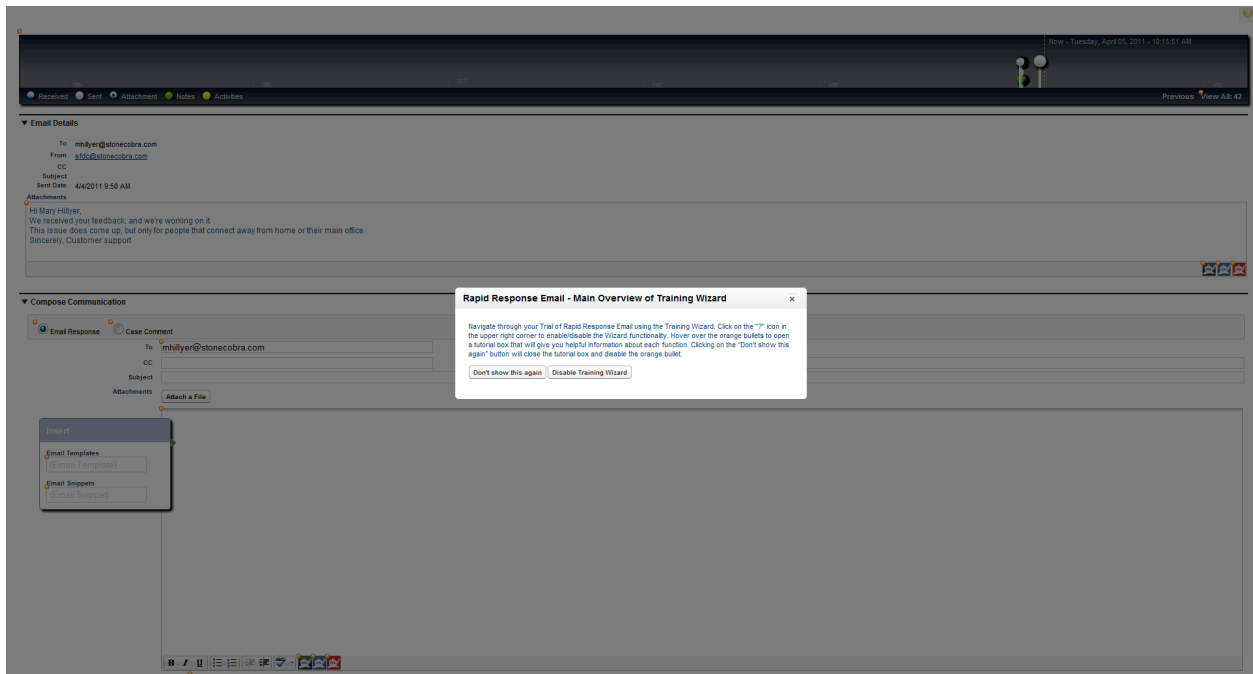
- Note:** Only the deployed article types entered in the custom setting will be used in the Application
- Go to **Setup > App Setup > Develop > Custom Settings**
- Click the Manage link next to Platform Article Types
- Click the New button
- Enter the API Name of the Article Type
- Check the Deployed checkbox if the article type has been deployed
 - Note:** Only deployed article types will appear in the application
- Click Save
- Repeat the above steps for each article type



Training Wizard for High Volume Case Responder

To help introduce you to the features of Rapid Response Email we have a self-guided Training Wizard tool for you to use.

After you open the application, choose a case and click on the Communication tab. You will see an overview that starts the Training Wizard. To stay in the Training Wizard mode, click on the "x" and continue learning about the features. Otherwise, you may click the Disable Training Wizard button.



You may re-enable the Training Wizard at any time by clicking on the orange question (?) mark above the timeline and clicking the Toggle options control button. Then click the Reactivate all Aides button. Hover over the orange bullets to open a tutorial box that will give you helpful information about each feature. You may also click on the arrows in the Toggle options to automatically click thru the features.

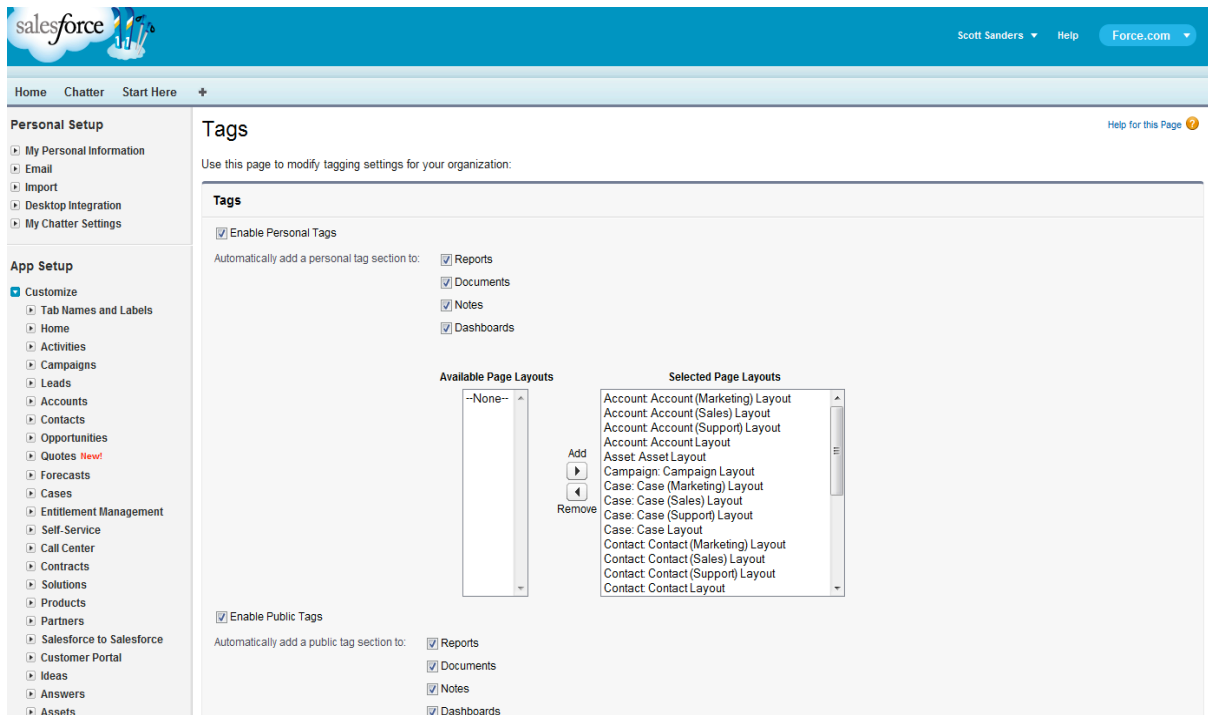


Section II. Deployment steps for Non Service Cloud Users

Pre-Deployment Steps

Configuration

1. Enable Public and Personal Tags
 - a. Go to **Setup > App Setup > Customize > Tags > Tag Settings**
 - b. Enable both Public and Personal Tags
 - c. Click Save



2. Go back to AppExchange and click on the Get It Now button to begin the installation
 - a. **Note:** If the installation fails, you may need to check the box to "Ignore Apex test failures that may cause the installed application not to function properly".

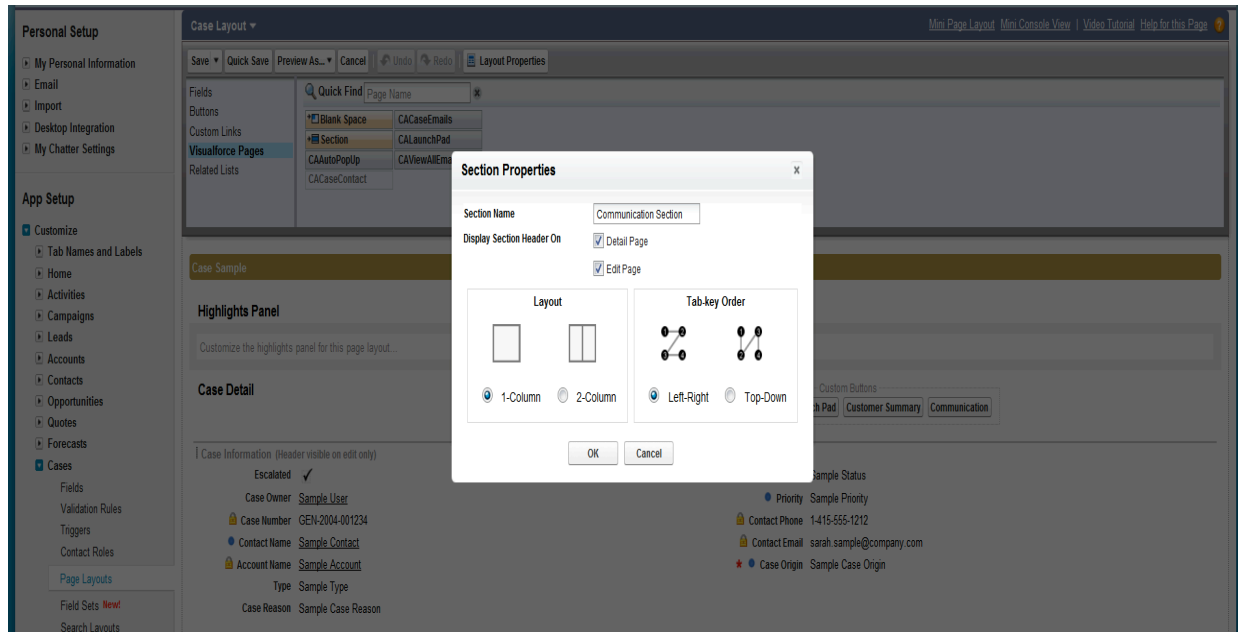
Post-Deployment Steps

Configuration

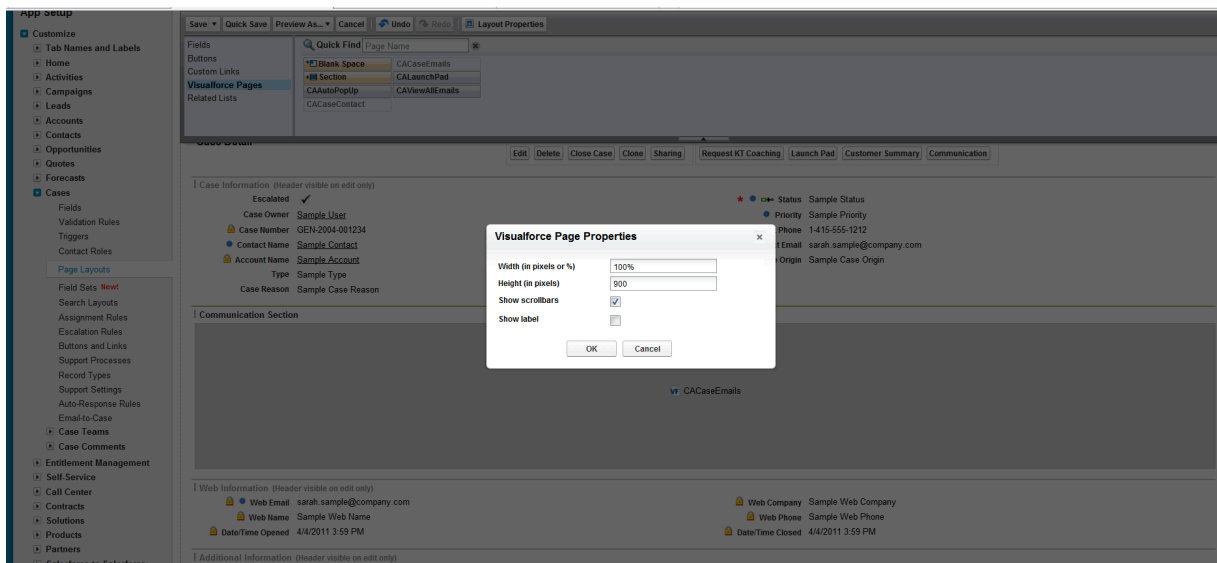
Note: Before getting started, please add the System Administrator to the High Volume Case Responder licensed users. Go to **Setup > App Setup > Installed Packages** and click on Manage Licenses next to the High Volume Case Responder Application.

To apply the default configuration, go to the High Volume Case Responder Setup Wizard and follow the instructions. Go to Setup > App Setup > Installed Packages and click on Configure next to the High Volume Case Responder Application. To further customize your installation and to use your own settings, follow these steps:

1. Add Communication Page to the Case Detail Page
 - a. Go to **Setup > App Setup > Customize > Cases > Page Layouts**
 - b. Click Edit next to Case Layout
 - c. At the top, click Visualforce Pages in the layout manager
 - d. Select and drag Section onto the page underneath Case Information
 - e. Name the new section as Communication Section
 - f. Click 1-Column Layout
 - g. Click OK



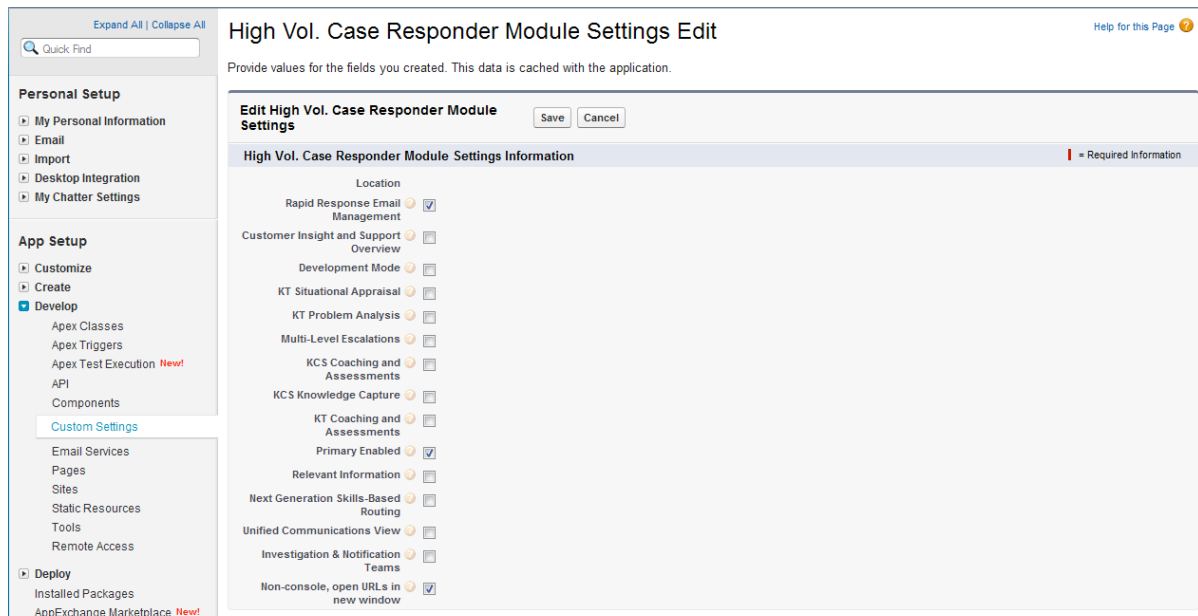
- h. Drag the CACase Emails Button to the Communication Section
- i. Click the wrench icon in the upper right corner of the newly dragged CACaseEmails to open the Visualforce Page Properties window
- j. Enter 100% in the Width box
- k. Enter 900 in the Height box
- l. Click the Show Scrollbars checkbox
- m. Click OK
- n. Click Save in the upper-left corner to save your new layout



2. Module Settings

- a. Go to **Setup > App Setup > Develop > Custom Settings**
- b. Click the Manage link next to High Vol. Case Responder Module Settings
- c. Click the New button

- d. Check the Rapid Response Email Management, Primary Enabled, and Non-console open URLs in new window checkboxes
- e. Click Save



Expand All | Collapse All

Quick Find

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution *New!*
 - API
 - Components
 - Custom Settings
- Email Services
- Pages
- Sites
- Static Resources
- Tools
- Remote Access
- Deploy
 - Installed Packages
 - AppExchange Marketplace *New!*

High Vol. Case Responder Module Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit High Vol. Case Responder Module Settings [Save] [Cancel]

High Vol. Case Responder Module Settings Information ⓘ = Required Information

Location

Rapid Response Email Management ☒

Customer Insight and Support Overview ☐

Development Mode ☐

KT Situational Appraisal ☐

KT Problem Analysis ☐

Multi-Level Escalations ☐

KCS Coaching and Assessments ☐

KCS Knowledge Capture ☐

KT Coaching and Assessments ☐

Primary Enabled ☒

Relevant Information ☐

Next Generation Skills-Based Routing ☐

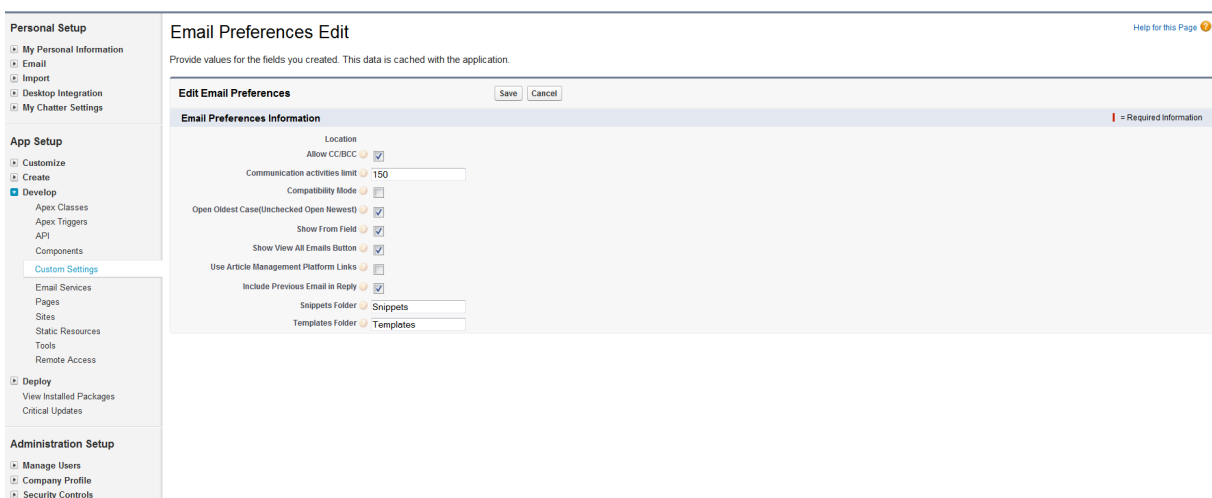
Unified Communications View ☐

Investigation & Notification Teams ☐

Non-console, open URLs in new window ☒

3. Email Preferences

- a. Go to **Setup > App Setup > Develop > Custom Settings**
- b. Click the Manage link next to Email Preferences
- c. Click the New button
- d. Check the Allow CC/BCC, Show From Field, and Show View All Emails Button
- e. Click Save



Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - Apex Triggers
 - API
 - Components
 - Custom Settings
- Email Services
- Pages
- Sites
- Static Resources
- Tools
- Remote Access
- Deploy
 - View Installed Packages
 - Critical Updates

Administration Setup

- Manage Users
- Company Profile
- Security Controls

Email Preferences Edit

Provide values for the fields you created. This data is cached with the application.

Edit Email Preferences [Save] [Cancel]

Email Preferences Information ⓘ = Required Information

Location

Allow CC/BCC ☒

Communication activities limit 150

Compatibility Mode ☐

Open Oldest Case(Unchecked Open Newest) ☒

Show From Field ☒

Show View All Emails Button ☒

Use Article Management Platform Links ☐

Include Previous Email in Reply ☒

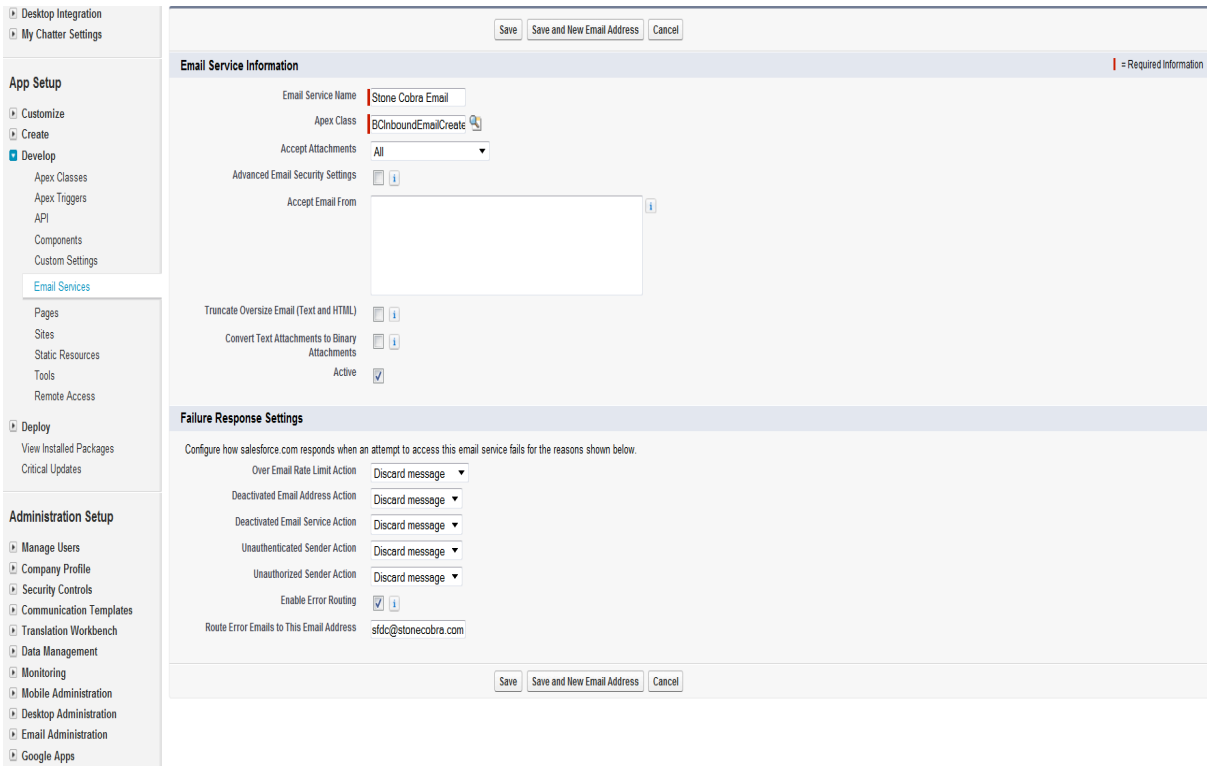
Snippets Folder

Templates Folder

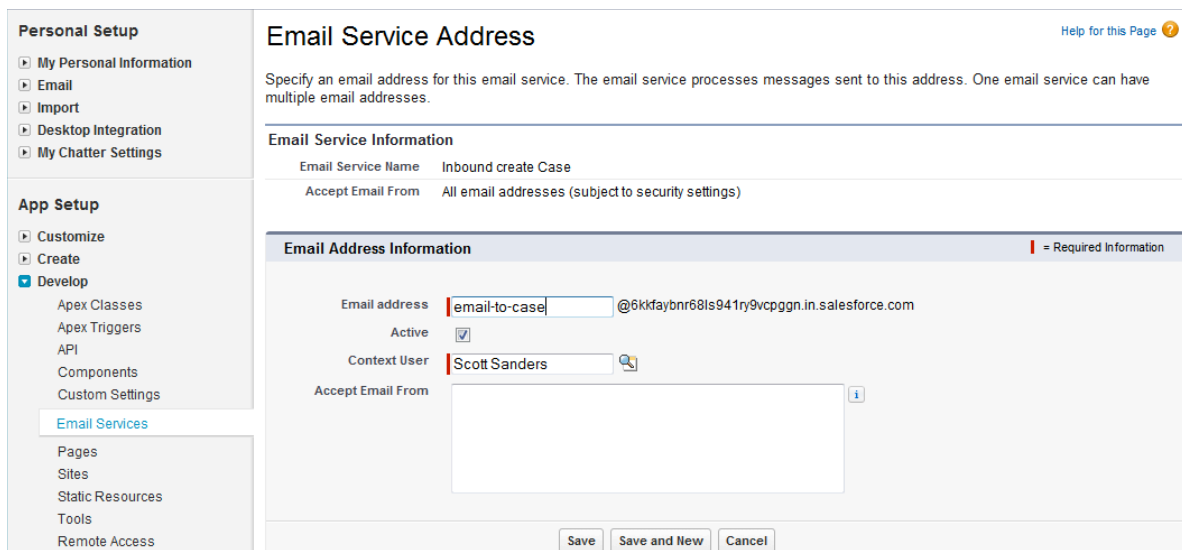
4. Add an Email Service

- a. Go to **Setup > App Setup > Develop > Email Services**
- b. Click New Email Service
- c. Enter Stone Cobra Email for the Email Service Name
- d. Use the lookup field for Apex Class to find BCInboundEmailCreateCase

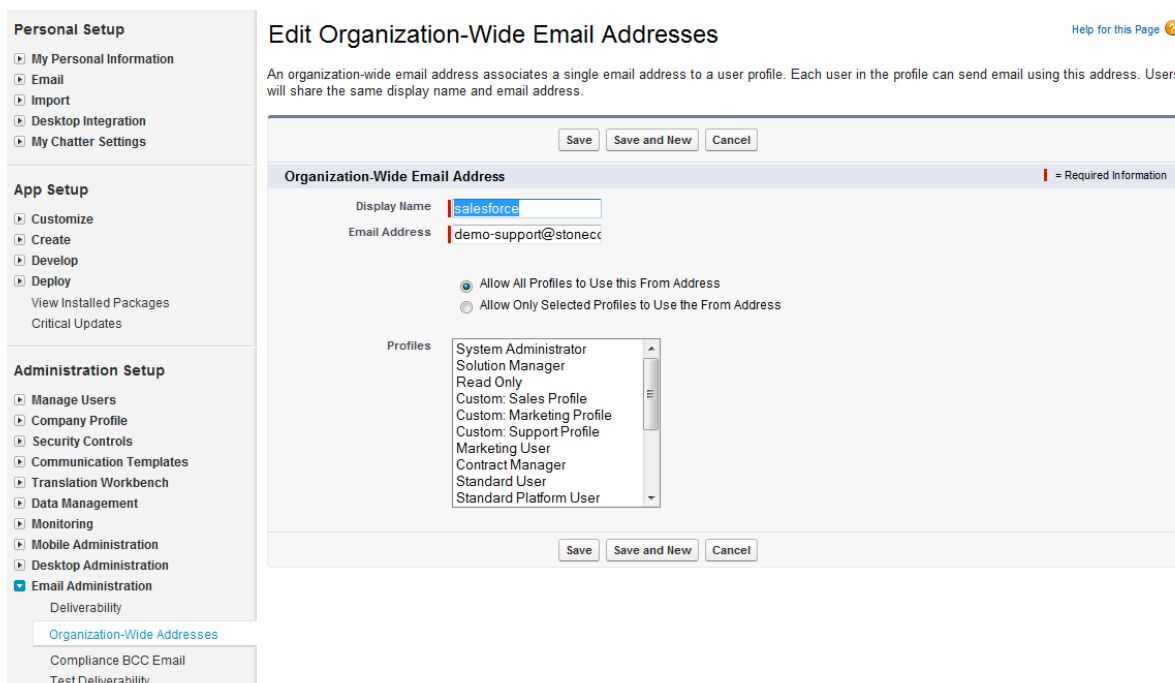
- e. Under Accept Attachments, choose All
- f. Check the Active checkbox
- g. Check the Enable Error Routing checkbox
- h. Enter sfdc@stonecobra.com in the Route Error Emails to This Email Address box
- i. Click the Save and New Email Address button



- j. Enter email-to-case in the Email Address field
- k. Remove all text from the Accept Email From text box
- l. Click Save



5. Enable email round tripping
 - a. **Note:** the Reply To address when sending an email is equal (in the Application) to the From Address, therefore an Organization-Wide Address needs to be set
 - b. Go to **Setup > Administration Setup > Email Administration > Organization-Wide Addresses**
 - c. Add a new address
 1. Note: a new external email address needs to be set for routing or it is possible to use the email address that was generated by the email services. If the second option is chosen, then a new case will be created with an email containing the verification URL.
 2. Click Add
 3. Enter the Display Name
 4. Enter the email address
 5. Select the profiles that should be able to use this address. All profiles must have access to a from address in order to use the application
 6. Click Save



Platform Knowledge Configuration(Optional)

6. Enable Platform Knowledge. Go to **Setup > Administration Setup > Manage Users > Users** to ensure the System Administrator is selected as a Knowledge User
 - b. Click Edit next to the System Administrator user. If the checkbox next to Knowledge User is not checked, check the box and click save.
 - c. Add an article type:
 1. Go to **Setup > App Setup > Customize > Knowledge > Article Types**
 2. Click New Article Type
 3. Enter the label, plural label, and object name

4. Choose the deployment status
 - a. **Note:** Only article types that have been marked as Deployed will appear in the application
5. Click Save

Edit Article Type Help for this Page ?

Documents

Article Type Edit Save Save & New Cancel

Article Type Information

The singular and plural labels are used in tabs, layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Offer

Plural Label Example: Offers

Starts with vowel sound ☐

The Object name is a unique identifier used for API purposes.

Object Name Example: Offer

Description

Deployment Status What is this?

☐ In Development

☒ Deployed

Save Save & New Cancel

- d. Enable Salesforce Knowledge
 1. Go to **Setup > App Setup > Customize > Knowledge > Settings**
 - a. Check the "Yes, I understand the impact of enabling Salesforce Knowledge" checkbox
 - b. Click Enable Salesforce Knowledge
 - c. Click OK

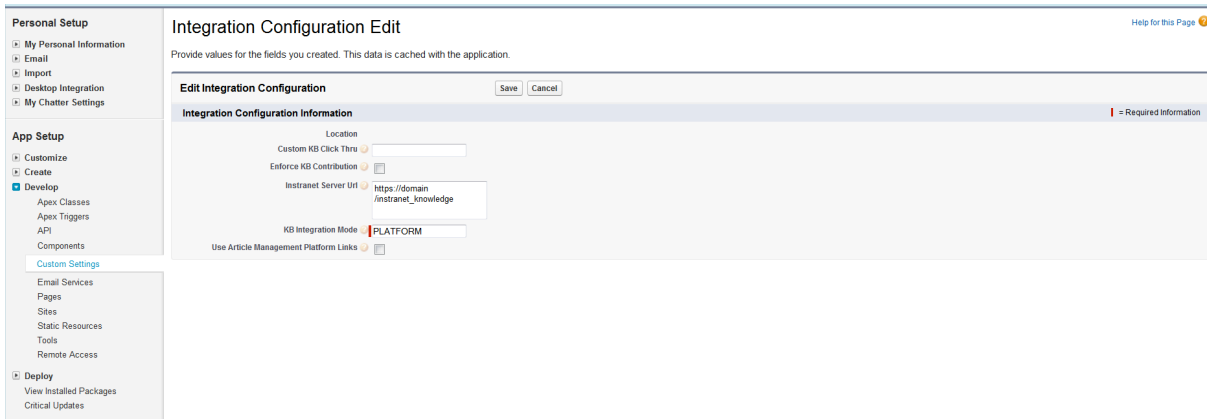
Knowledge Settings Help for this Page ?

IMPORTANT Before enabling Salesforce Knowledge, consider the following:

- The Articles tab will be available to all standard profiles.
- Enabling Salesforce Knowledge is not reversible. However, you can hide tabs by unchecking the View Articles and Edit Articles profile permissions, and you can hide the administration settings by unchecking the Manage Salesforce Knowledge profile permission.

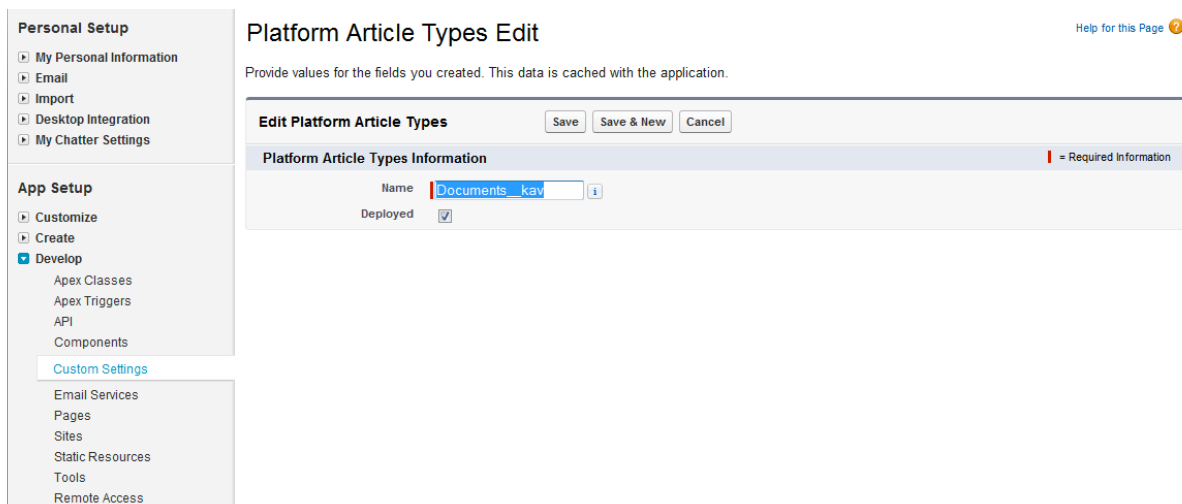
☒ Yes, I understand the impact of enabling Salesforce Knowledge.

7. Set the Platform Knowledge as the Application Knowledge (**Optional**)
 - a. Go to **Setup > App Setup > Develop > Custom Settings**
 - b. Click the Manage link next to Integration Configuration
 - c. Click the New button
 - d. Fill in the appropriate Intranet Server URL or leave as default if not applicable
 - e. Enter PLATFORM in the KB Integration Mode field
 - f. Click Save



8. Article types. (Optional)

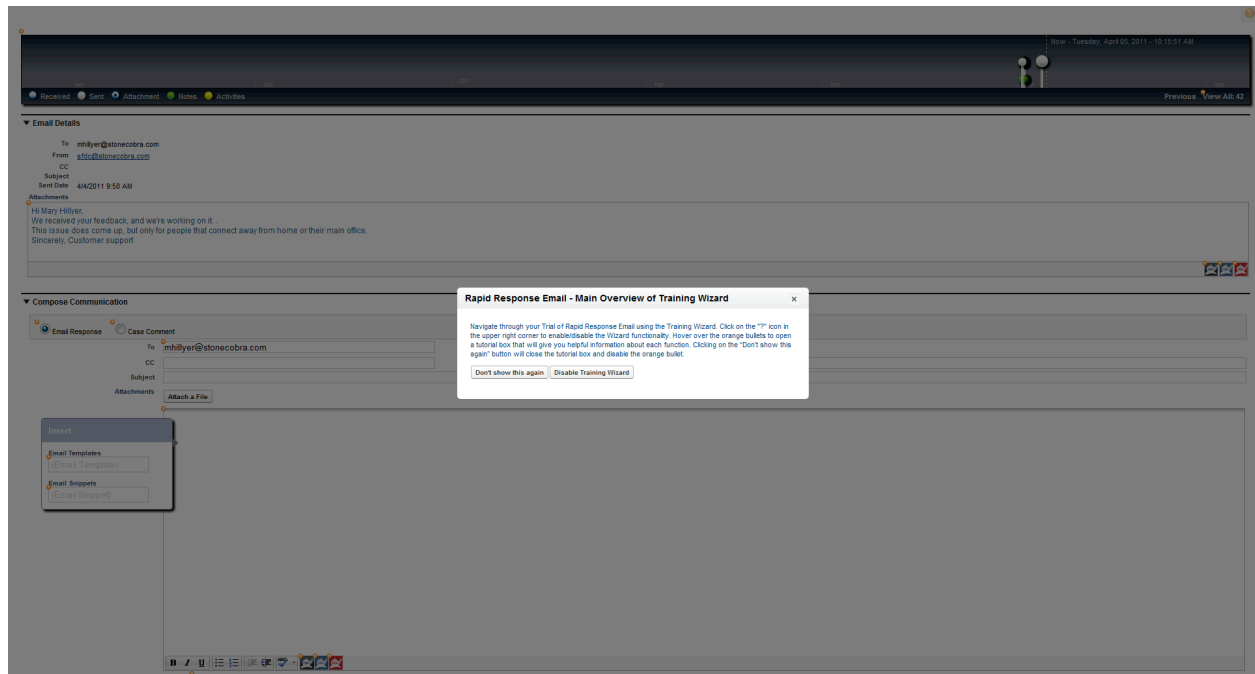
- Note:** Only Deployed article types entered in the custom setting will be used in the Application
- Go to **Setup > App Setup > Develop > Custom Settings**
- Click the Manage link next to Platform Article Types
- Click the New button
- Enter the API Name of the Article Type
- Check the Deployed checkbox if the article type has been deployed
 - Note:** Only Deployed article types will appear in the application
- Click Save
- Repeat the above steps for each article type



Training Wizard for Rapid Response Email with Knowledge Sharing

To help introduce you to the features of Rapid Response Email we have a self-guided Training Wizard tool for you to use.

After you open the application, choose a case, and then click on the Communication tab. There you will see an overview that starts the Training Wizard. To stay in the Training Wizard mode, click on the "x" to continue learning about the features. Otherwise, you may click on the Disable Training Wizard button.



You may re-enable the Training Wizard at any time by clicking on the orange question (?) mark above the timeline and clicking the Toggle options control button. Then click the Reactivate all Aides button. Hover over the orange bullets to open a tutorial box that will give you helpful information about each feature. You may also click on the arrows in the Toggle options to automatically click thru the features.

