stonecobra

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.

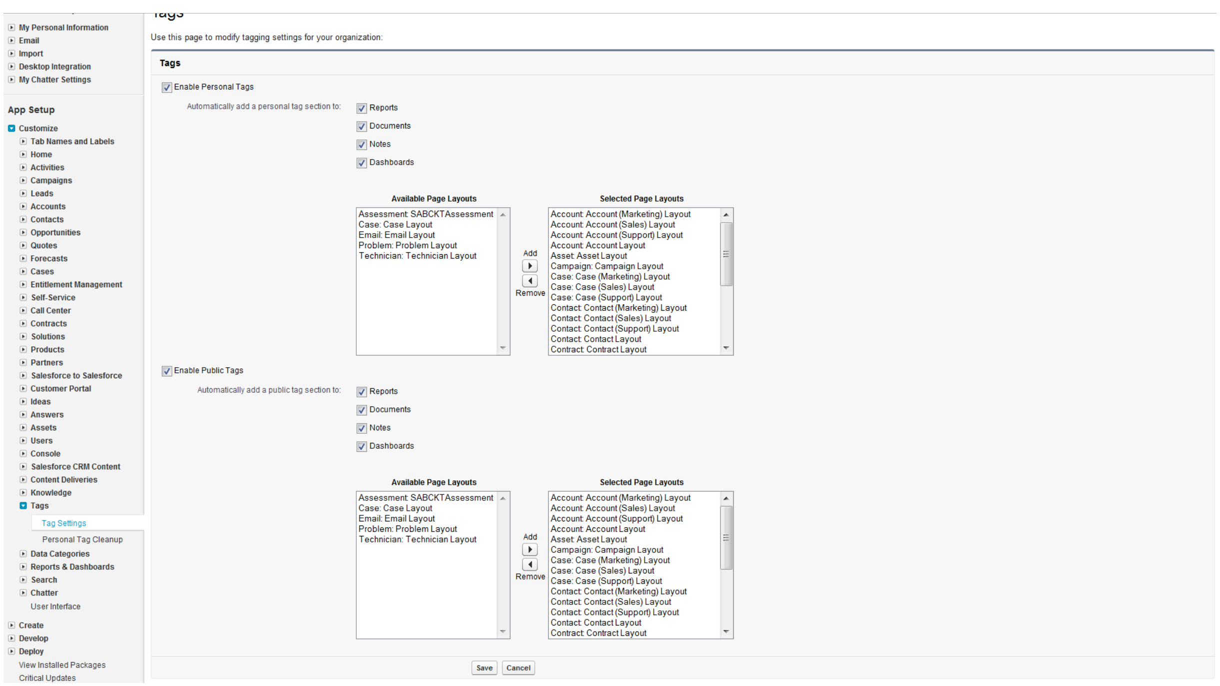
Table of Contents

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".

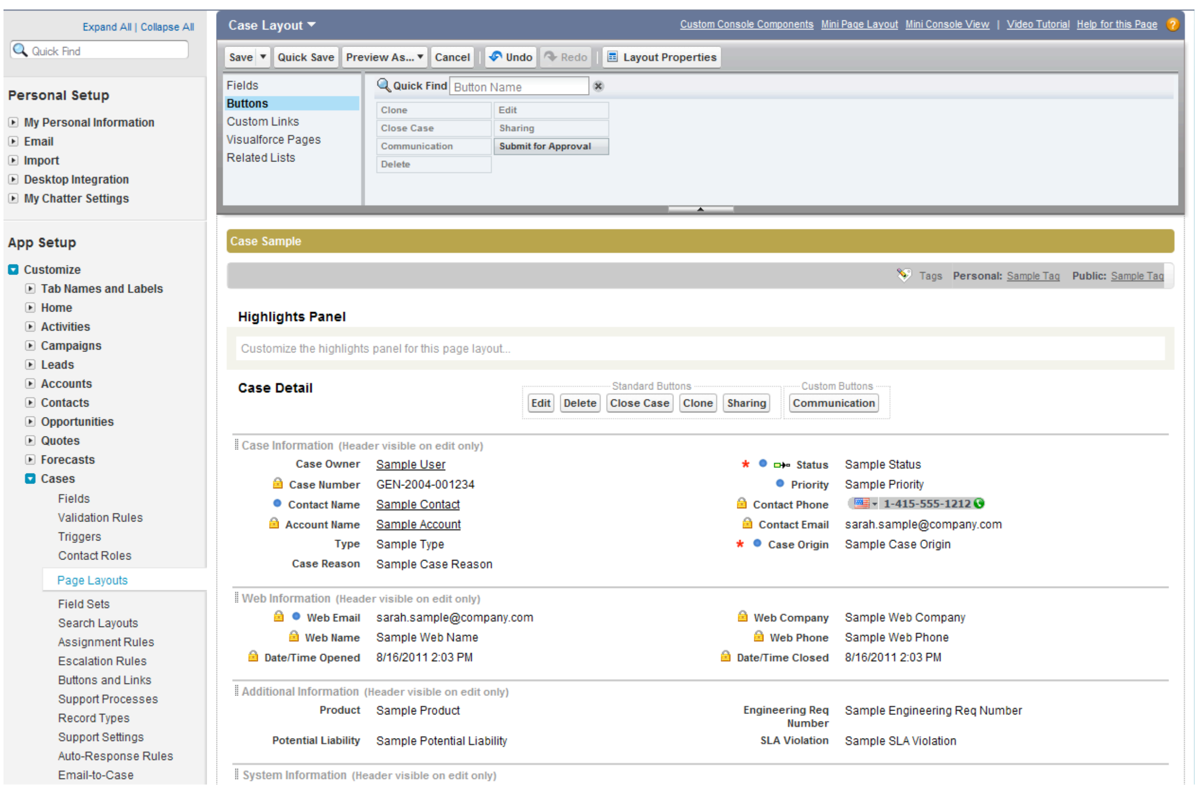
Post-Deployment Steps

Configuration

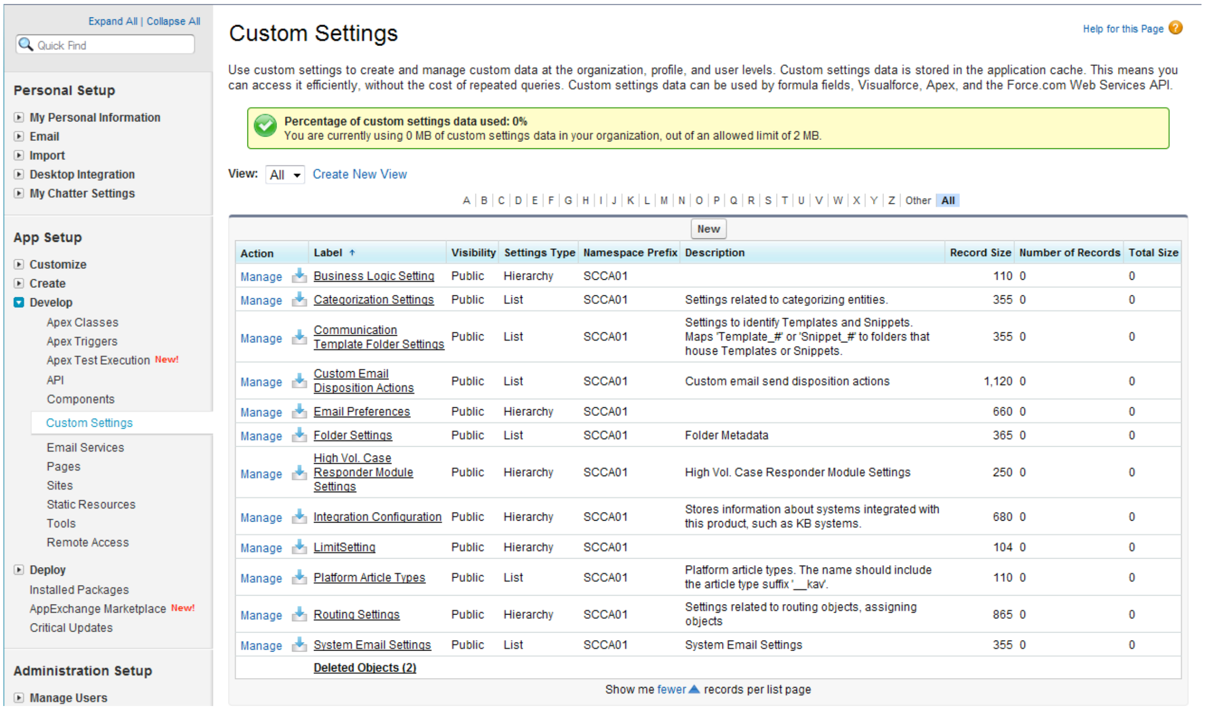
Note: Before getting started, please add the System Administrator to the Rapid Response Email licensed users. Go to **Setup > App Setup > View Installed Packages** and click on manage licenses next to the Rapid Response Email Application.

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:

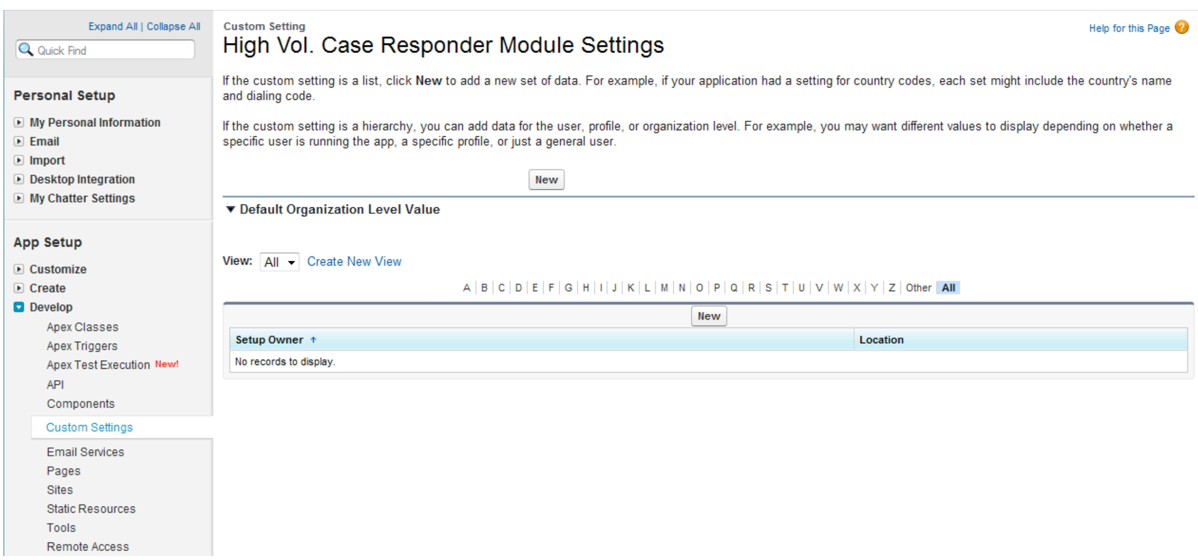
1. Add the Communication Button to the Case Page Layout
   a. Go to **Setup > App Setup > Customize > Cases > Page Layout**
   b. For each page layout that should provide access to High Volume Case Responder, follow the steps below
      1. Click Edit next to the Page Layout Name
      2. Select Buttons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



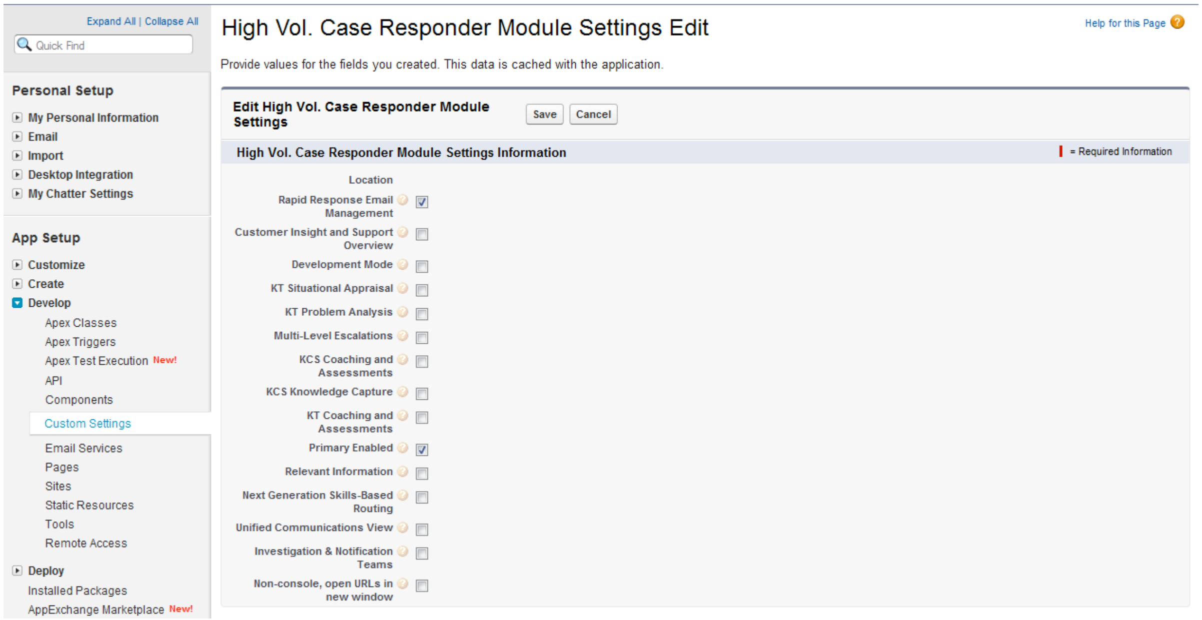
2. Module Settings
   a. Go to **Setup > App Setup > Develop > Custom Settings**



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

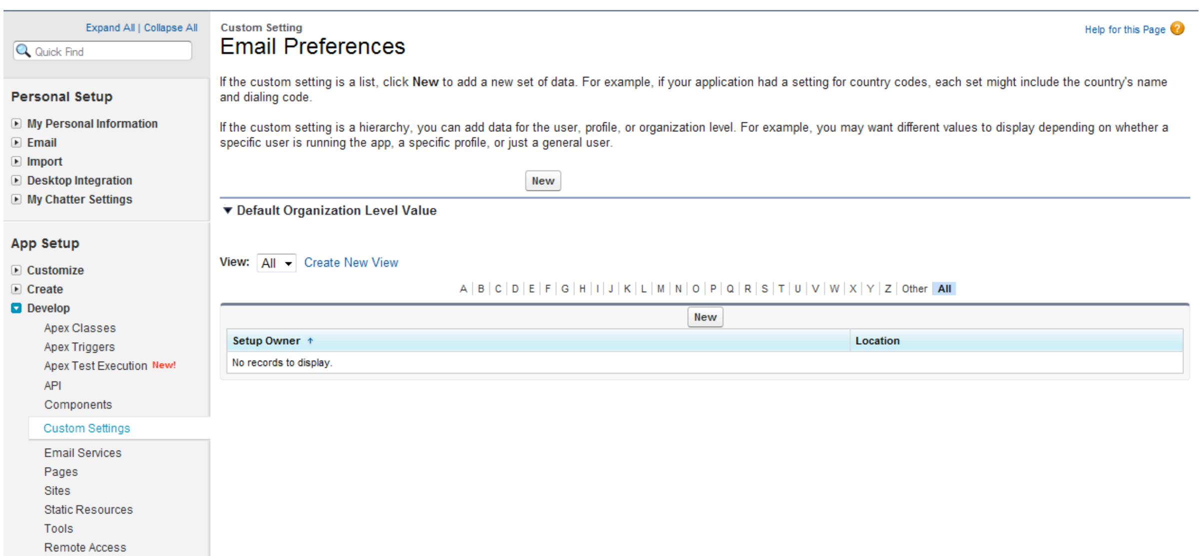


c. Click the New button
d. Check the Rapid Response Email Management and Primary Enabled checkboxes.

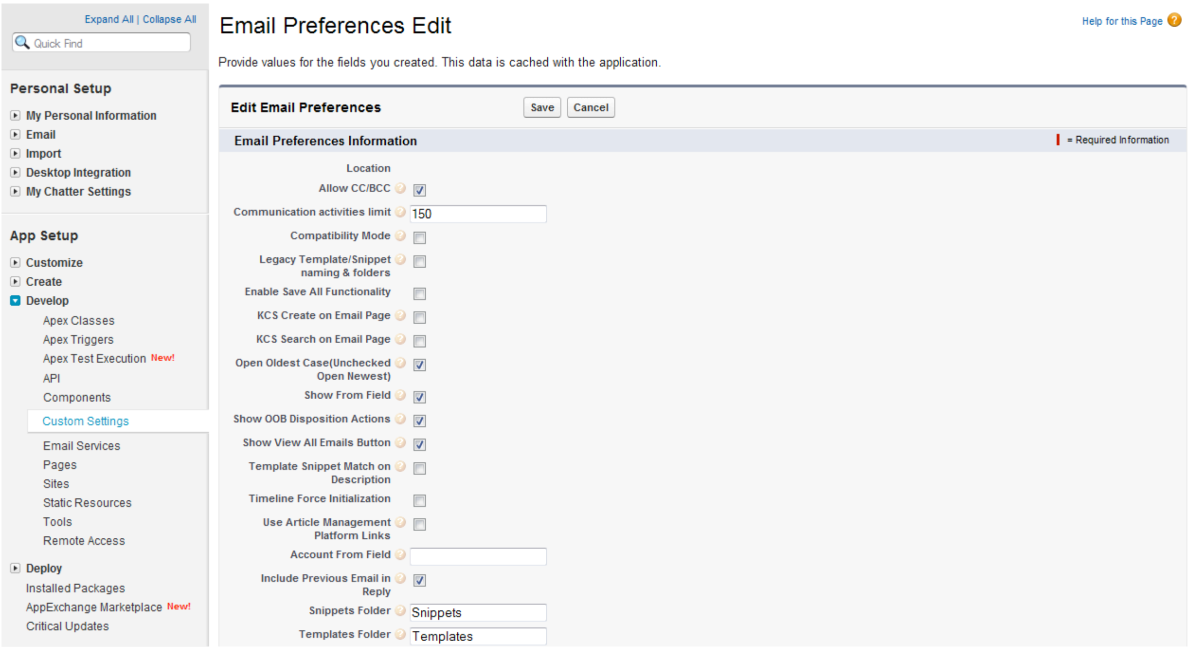


e. Click Save

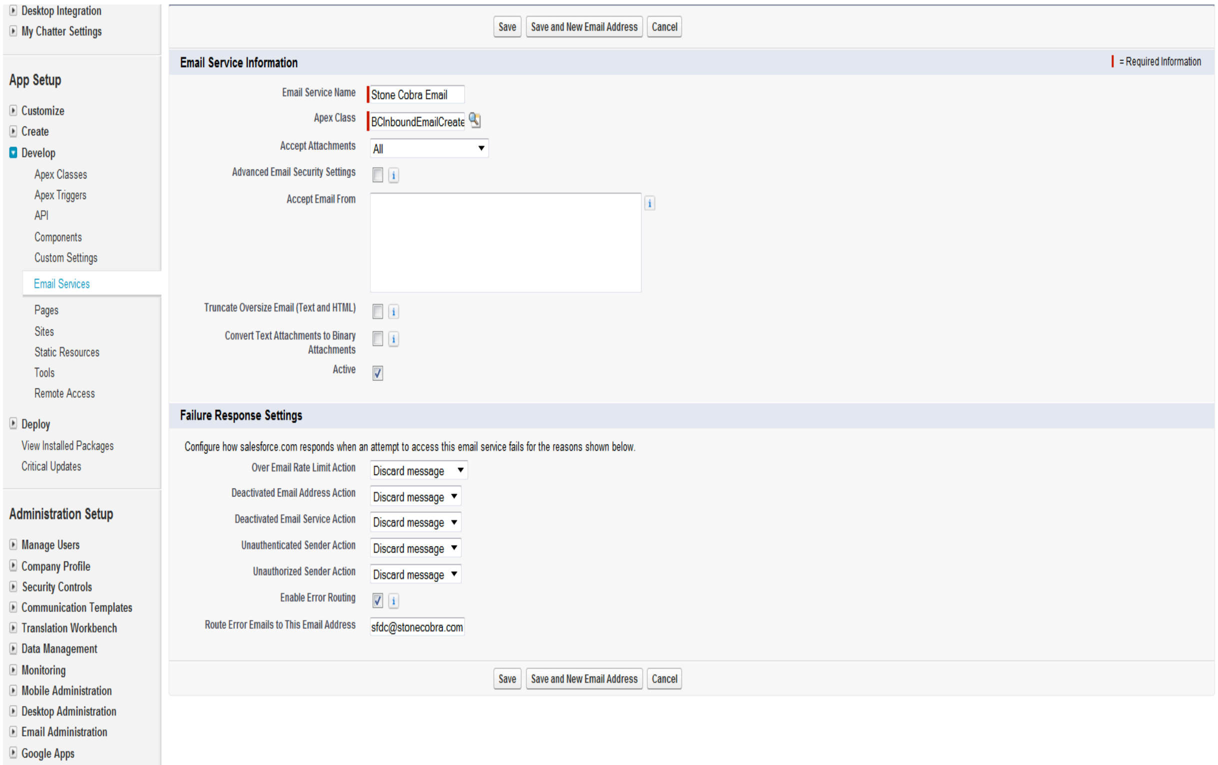
3. Email Preferences
   a. Go to **Setup > App Setup > Develop > Custom Settings**
   b. Click the Manage link next to Email Preferences



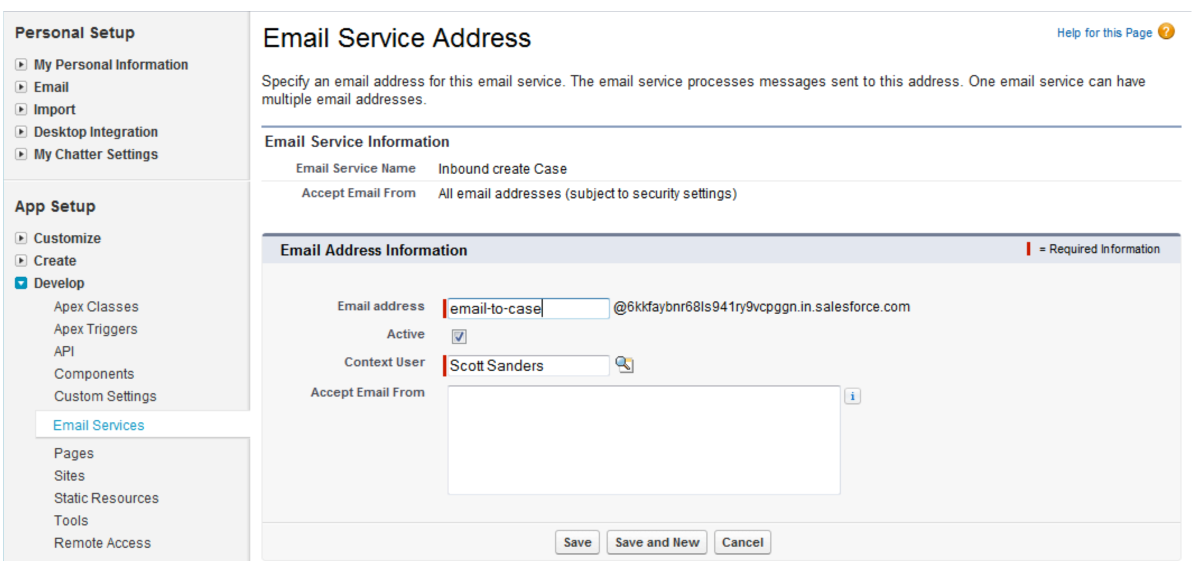
   c. Click the New button
   d. Check the Allow CC/BCC, Show From Field, and Show View All Emails Button checkboxes
   e. Click Save



4. Add an Email Service
    a. Go to **Setup > App Setup > Develop > Email Services**
    b. Click the New Email Service button
    c. Enter Stone Cobra Email for the Email Service Name
    d. In the Apex Class lookup field, choose BCInboundEmailCreateCase
    e. In the Accept Attachments dropdown, 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

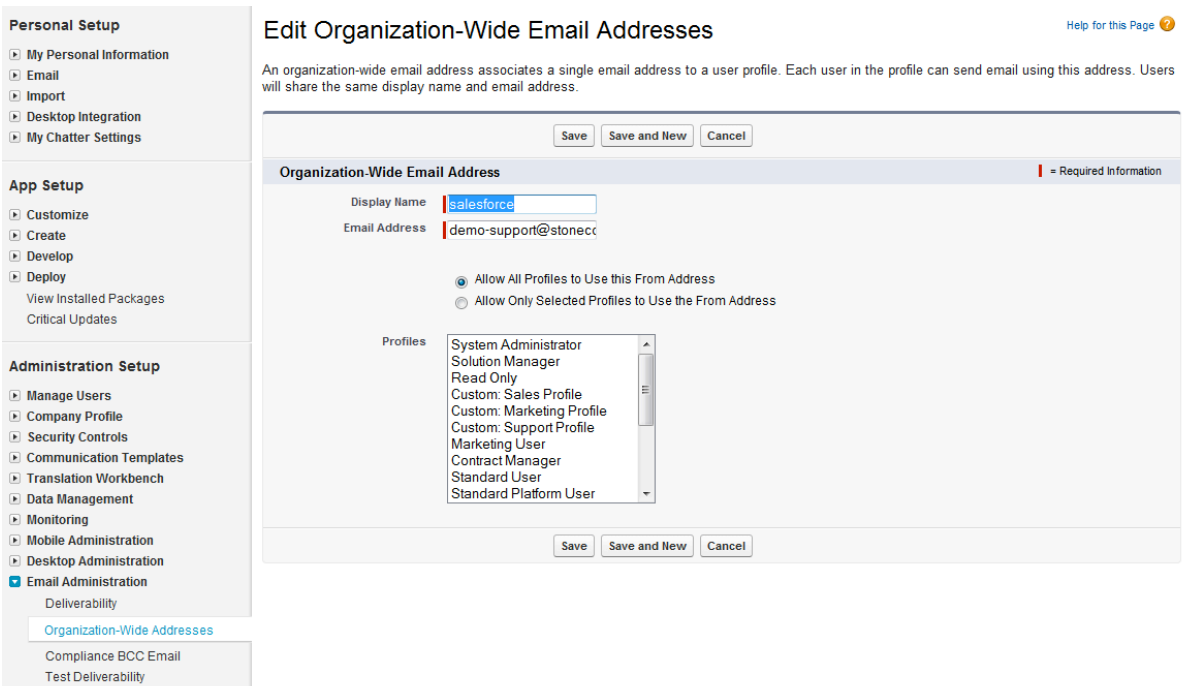


j. Enter email-to-case in the Email Address field
k. Remove all text from the Accept Email From text box
l. Click Save

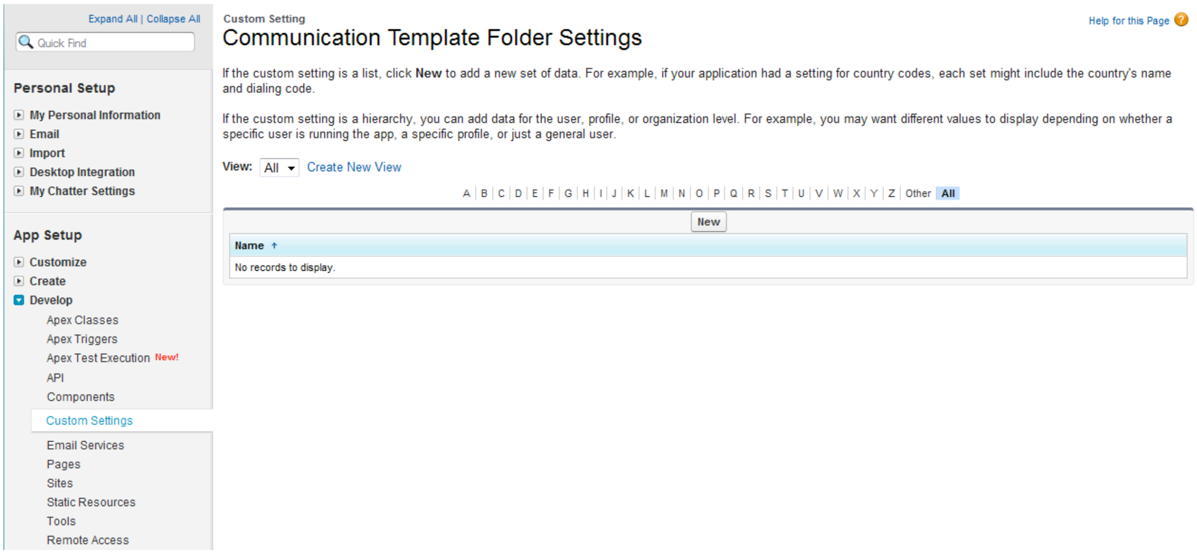


5. Enable email round tripping
   a. **Note:** the Reply To address when sending an email is equal (in the Application) to the From Address, therefore an Organization-Wide Address needs to be set
   b. Go to **Setup > Administration Setup > Email Administration > Organization-Wide Addresses**

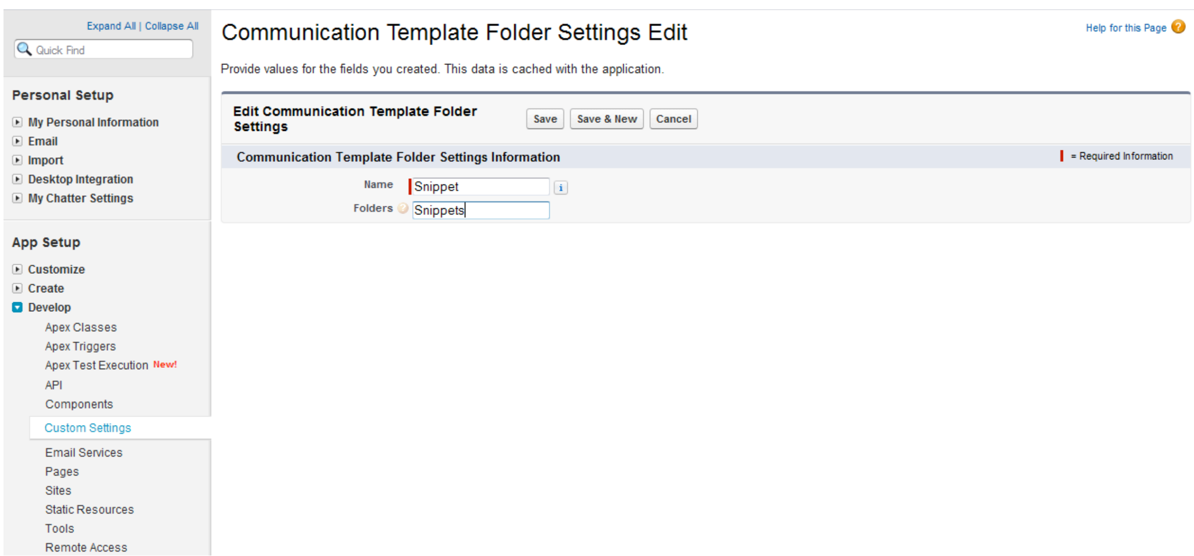
c. Add a new address
    1. **Note:** a new external email address needs to be set for routing or it is possible to use the email address that was generated by the email services. If the second option is chosen then a new case will be created with an email containing the verification URL.
    2. Click 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



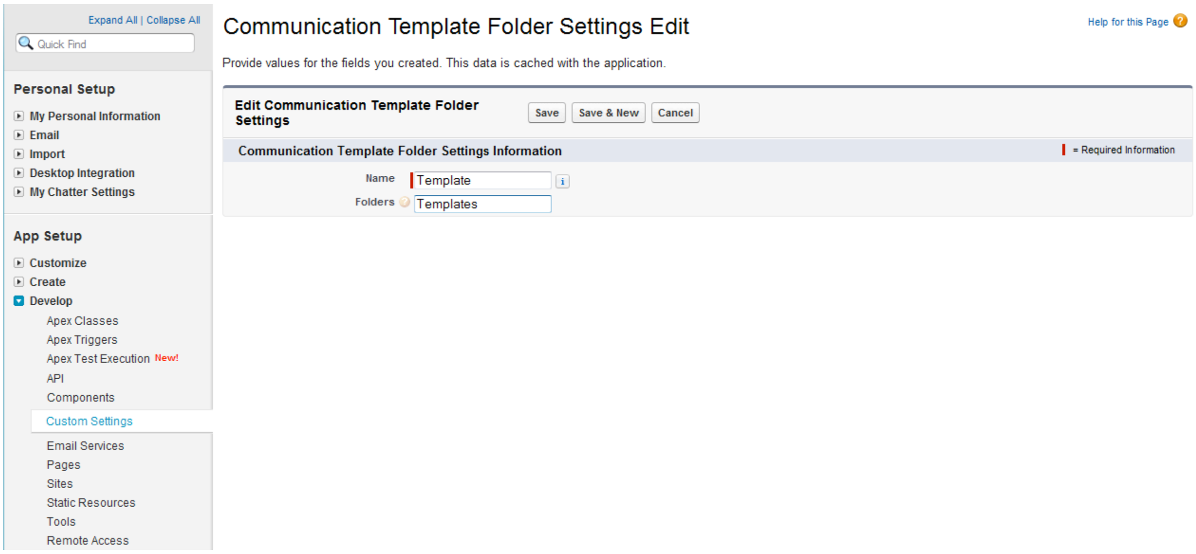
6. Configure Templates and Snippets Folders
    a. Go to **Setup > App Setup > Develop > Custom Settings**
    b. Click Manage next to Communication Template Folder Settings



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



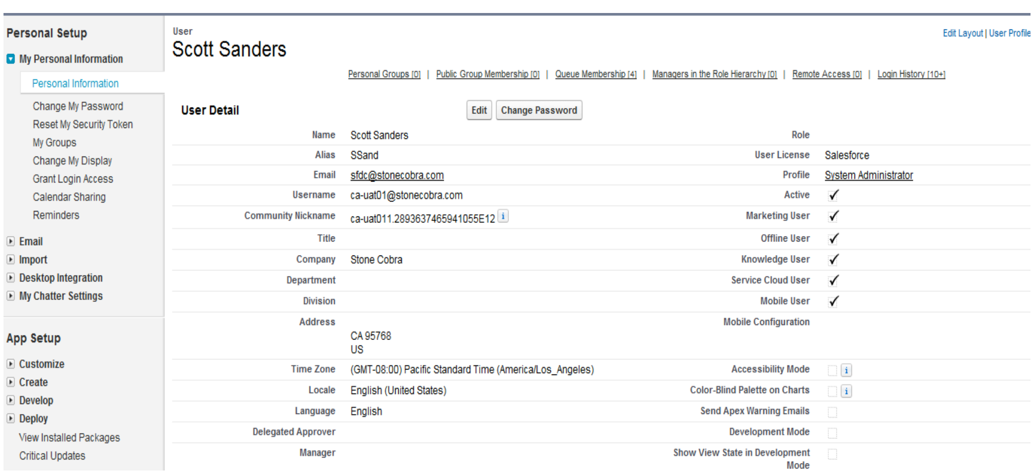
e. Click Save & New
f. Use the following values:
   1. Name: Template
   2. Folders: Templates
g. Click Save



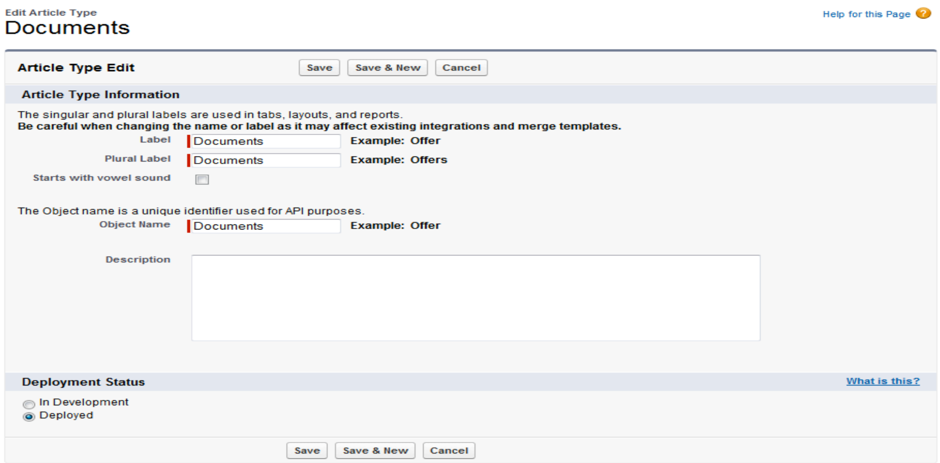
Platform Knowledge Configuration(Optional)

7. Enable Platform Knowledge **(Optional)**

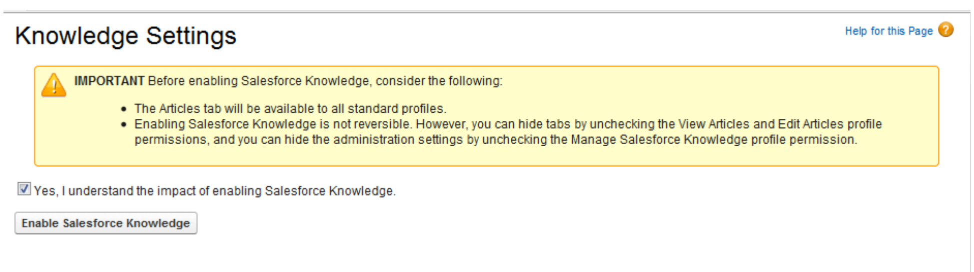
   a. Go to **Setup > Administration Setup > Manage Users > Users** to ensure the system administrator is selected as a Knowledge User
   b. If the checkbox next to Knowledge User is not checked:
      1. Click the Edit button
      2. Check the Knowledge User Checkbox
      3. Click Save
   c. Add an article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



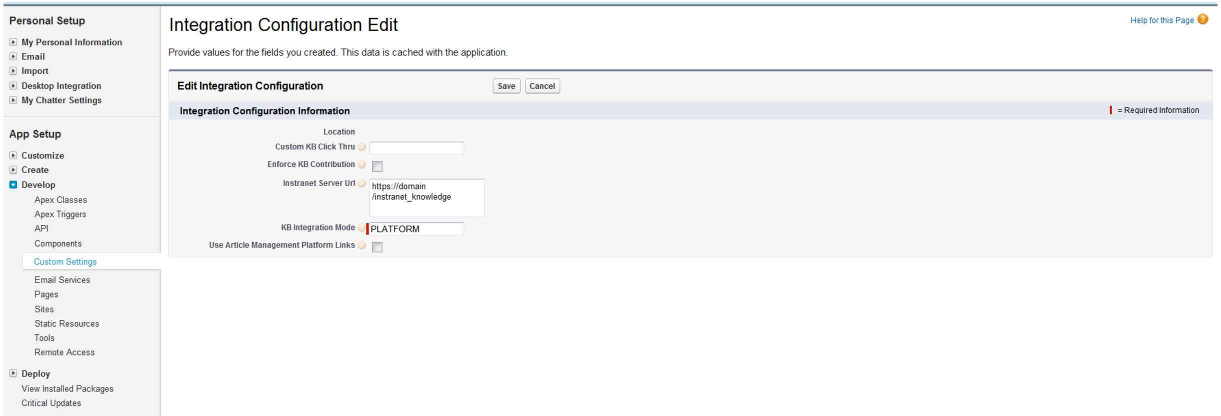
2. Click New Article Type
3. Enter the label, plural label, and object name
4. Choose the deployment status
    a. Note that only article types that have been marked as deployed will appear in the application
5. Click Save



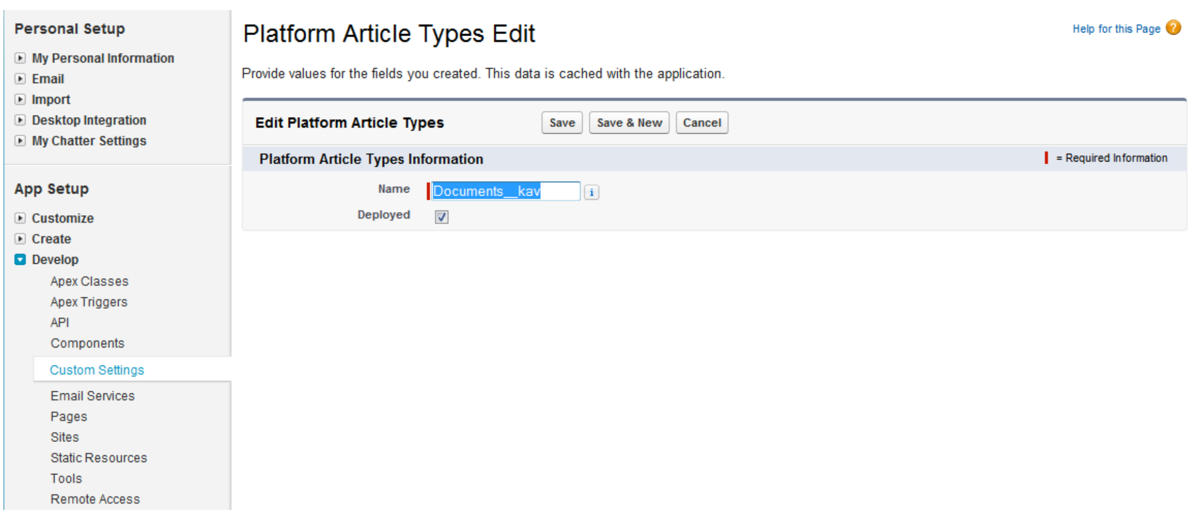
d. Enable Salesforce Knowledge
    1. Go to **Setup > App Setup > Customize > Knowledge > Settings**
        a. Check the "Yes, I understand the impact of enabling Salesforce Knowledge" checkbox
        b. Click Enable Salesforce Knowledge
        c. Click OK



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 Instranet Server URL or leave as default if not applicable
    e. Enter PLATFORM in the KB Integration Mode field
    f. Click Save



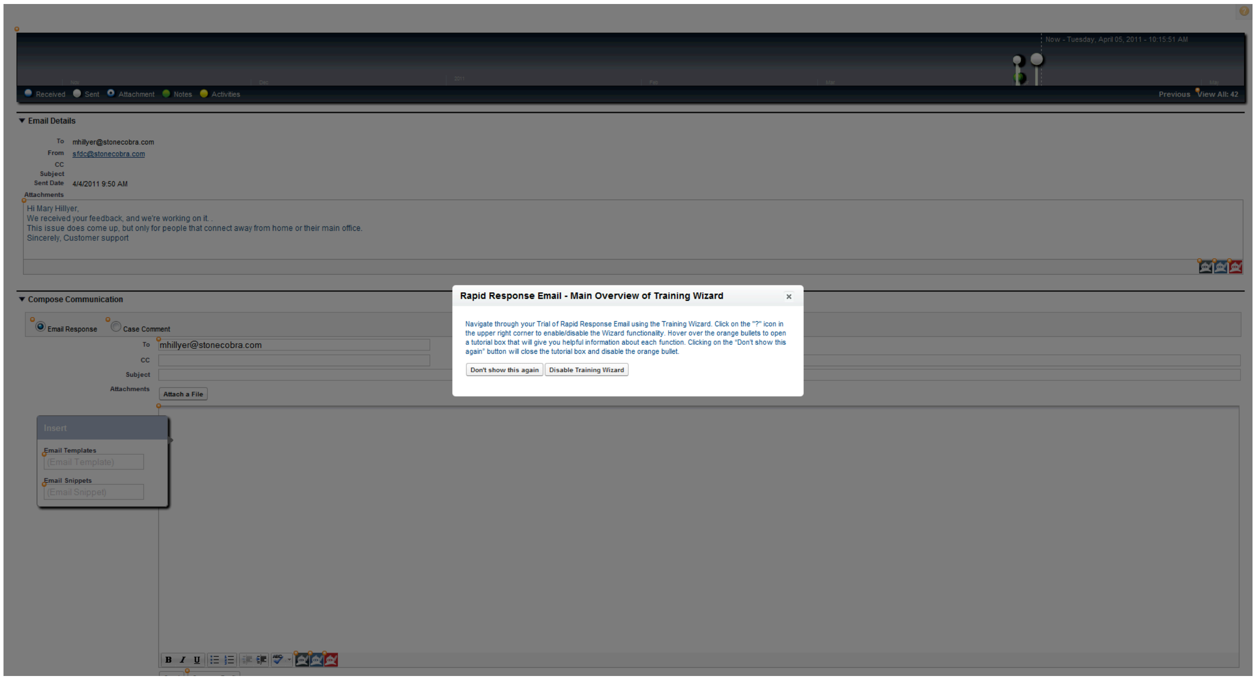
7. Article types. **(Optional)**
    a. **Note:** Only the deployed article types entered in the custom setting will be used in the Application
    b. Go to **Setup > App Setup > Develop > Custom Settings**
    c. Click the Manage link next to Platform Article Types
    d. Click the New button
    e. Enter the API Name of the Article Type
    f. Check the Deployed checkbox if the article type has been deployed
        1. **Note:** Only deployed article types will appear in the application
    g. Click Save
    h. 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.



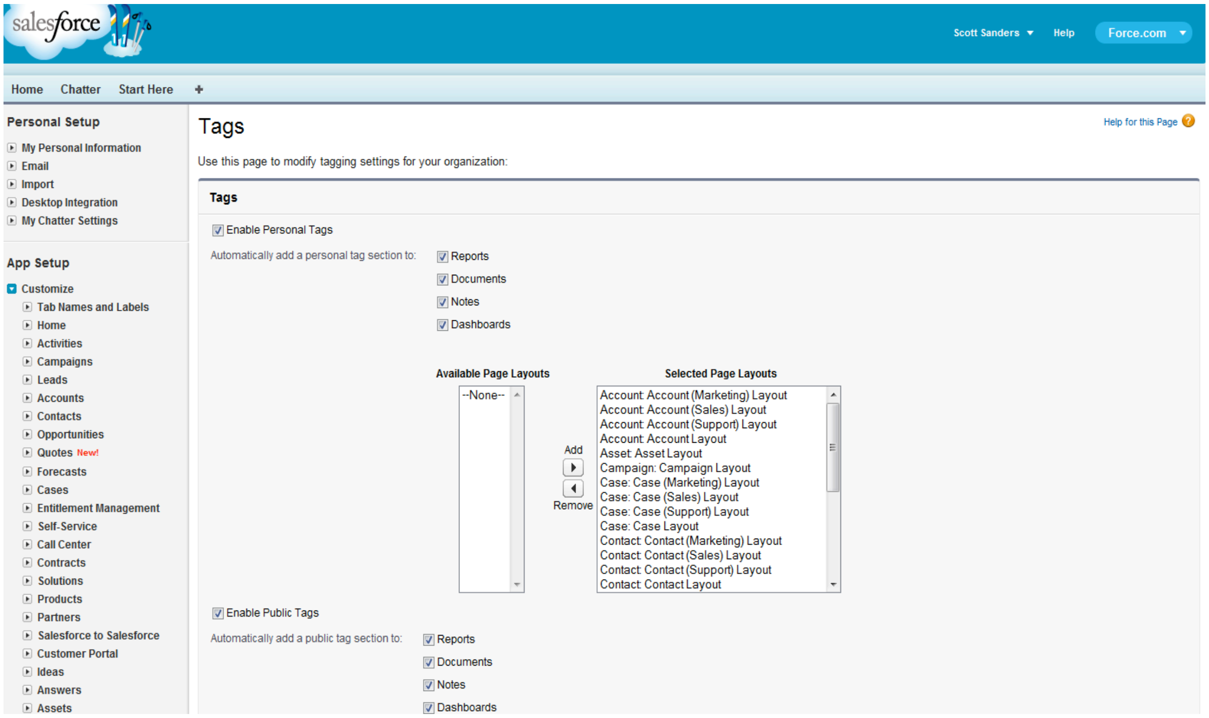
You may re-enable the Training Wizard at any time by clicking on the orange question (?) mark above the timeline and clicking the Toggle options control button. Then click the Reactivate all Aides button. Hover over the orange bullets to open a tutorial box that will give you helpful information about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

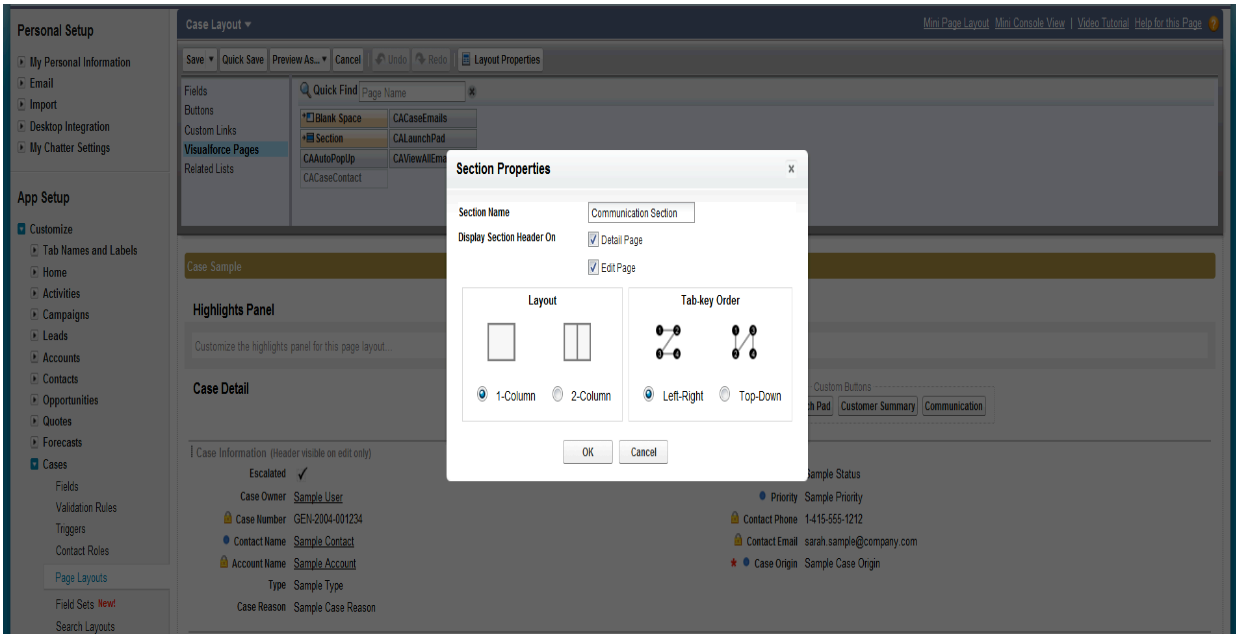
Post-Deployment Steps

Configuration

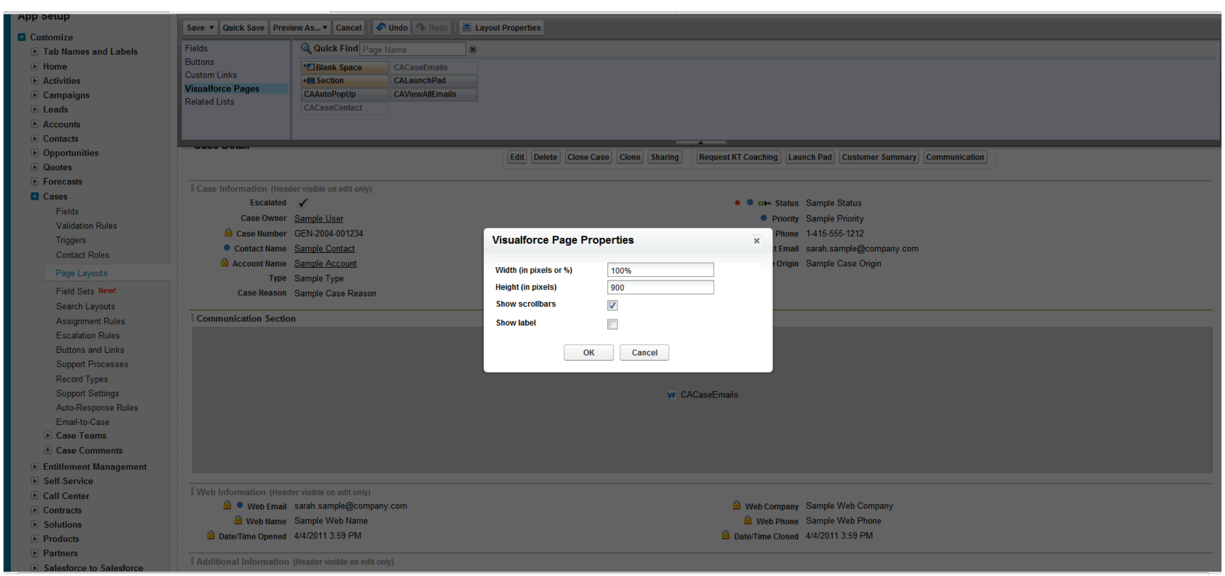
Note: Before getting started, please add the System Administrator to the High Volume Case Responder licensed users. Go to **Setup > App Setup > Installed Packages** and click on Manage Licenses next to the High Volume Case Responder Application.

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

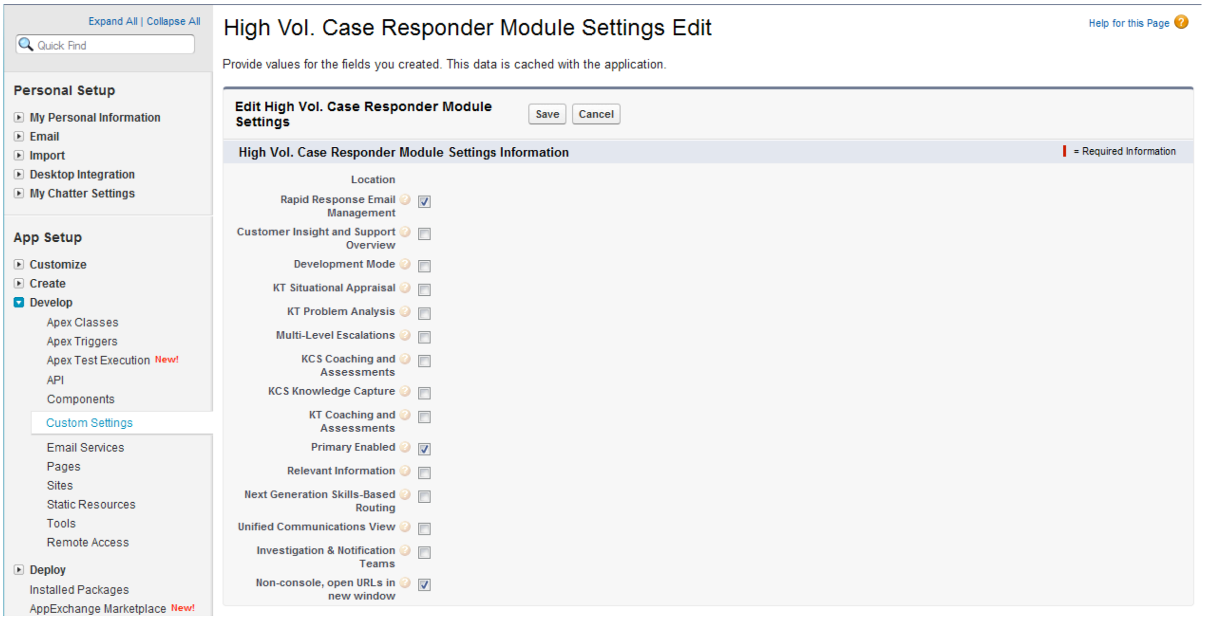


h. Drag the CACase Emails Button to the Communication Section
i. Click the wrench icon in the upper right corner of the newly dragged CACaseEmails to open the Visualforce Page Properties window
j. Enter 100% in the Width box
k. Enter 900 in the Height box
l. Click the Show Scrollbars checkbox
m. Click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

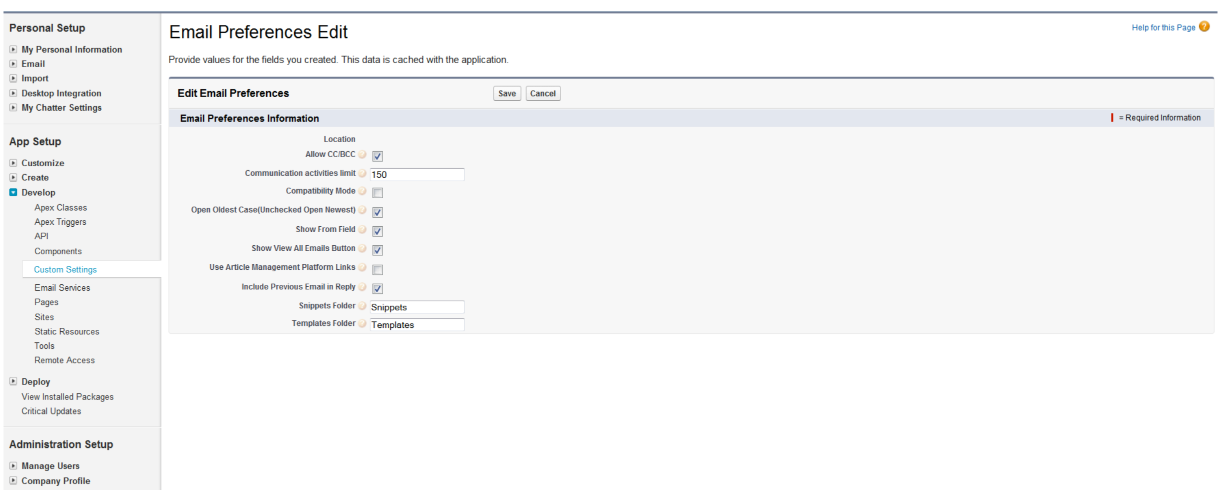


2. Module Settings
   a. Go to **Setup > App Setup > Develop > Custom Settings**
   b. Click the Manage link next to High Vol. Case Responder Module Settings
   c. Click the New button

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

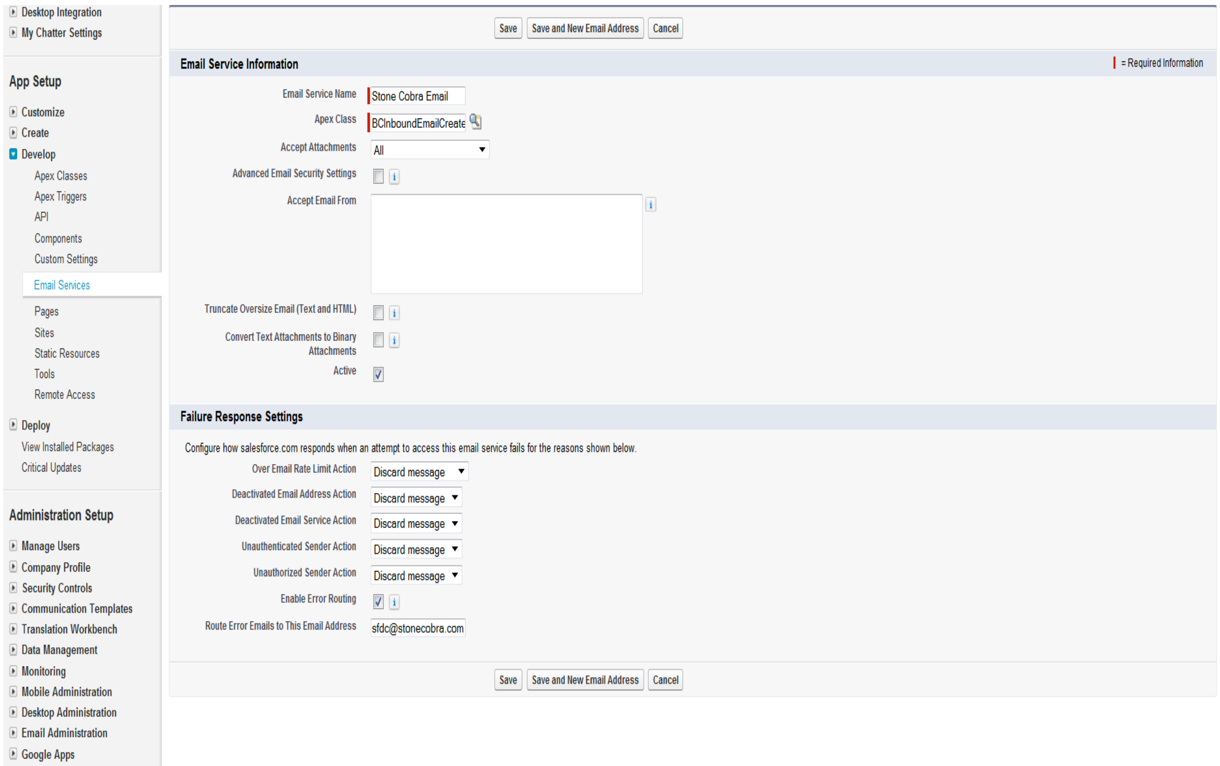


3. Email Preferences
a. Go to **Setup > App Setup > Develop > Custom Settings**
b. Click the Manage link next to Email Preferences
c. Click the New button
d. Check the Allow CC/BCC, Show From Field, and Show View All Emails Button
e. Click Save



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



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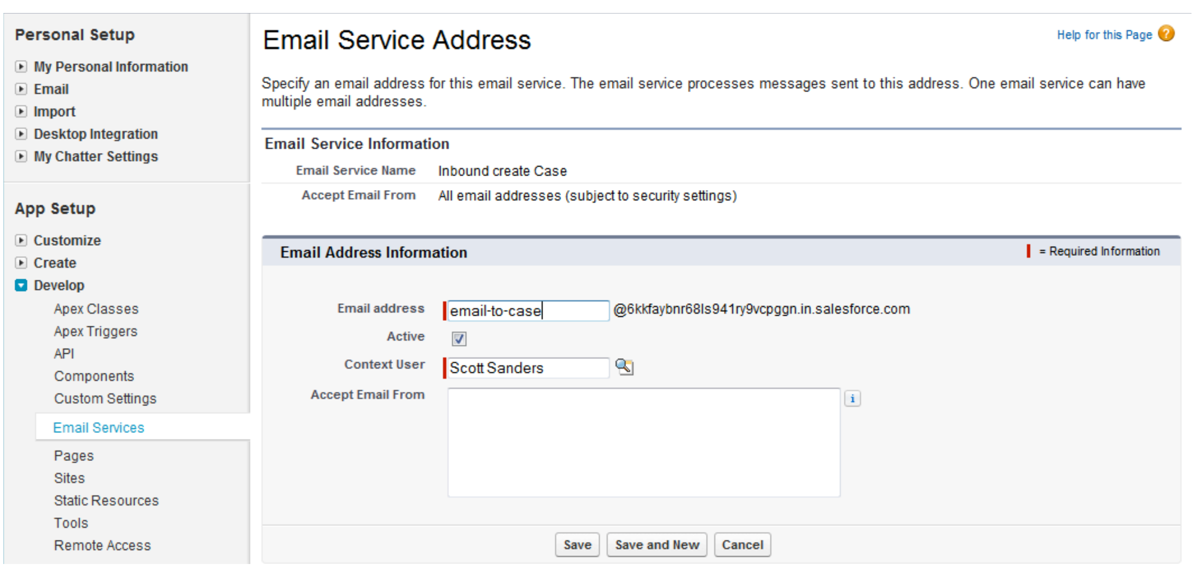

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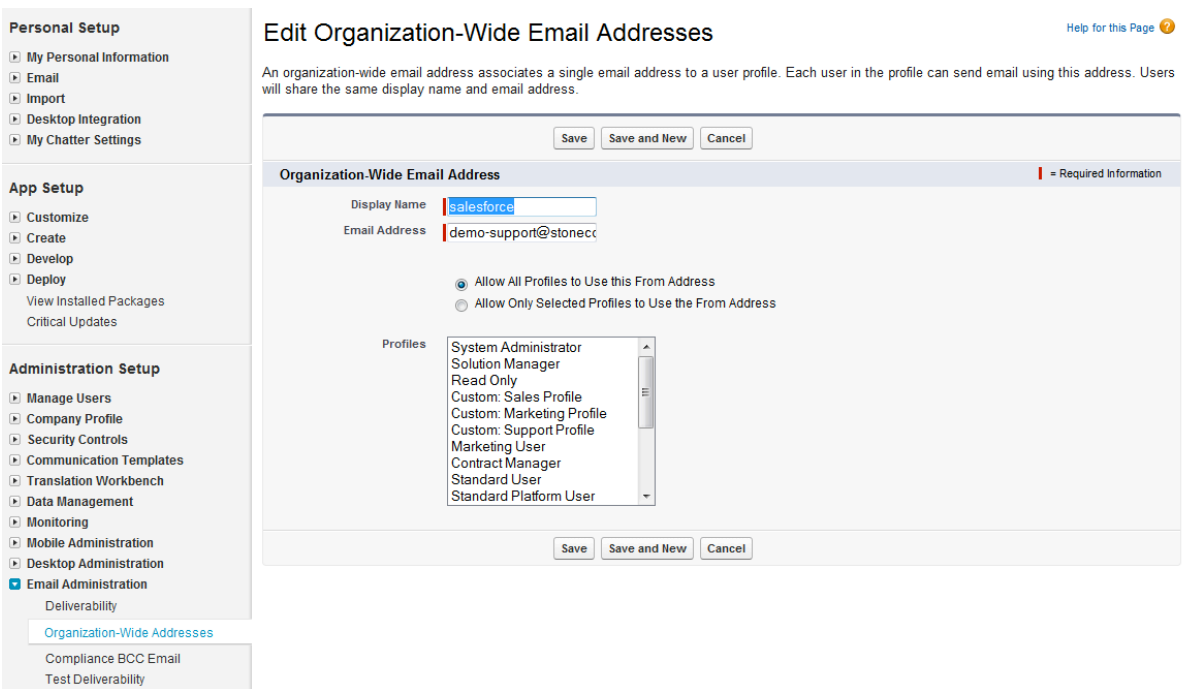
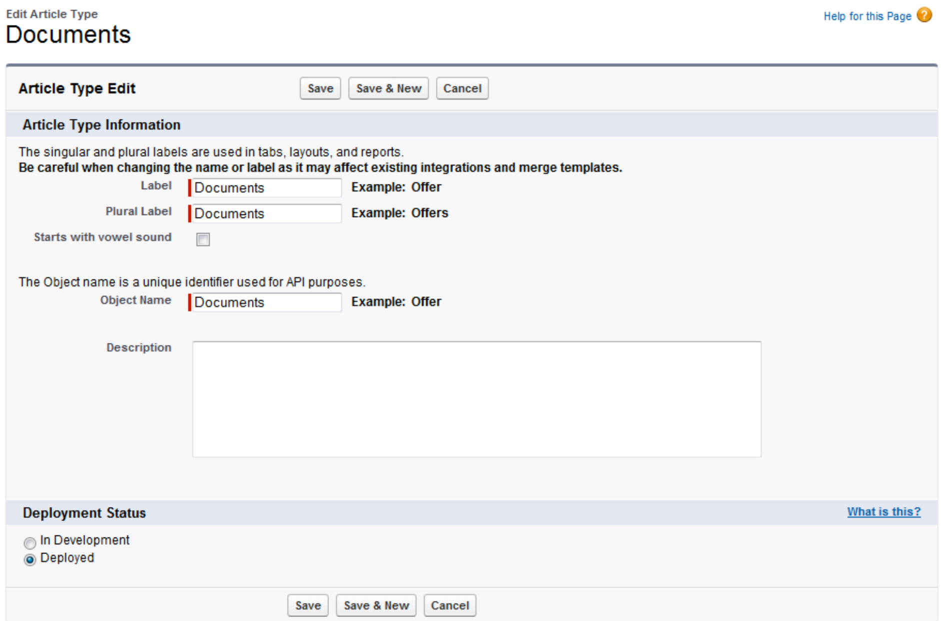


Platform Knowledge Configuration(Optional)

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



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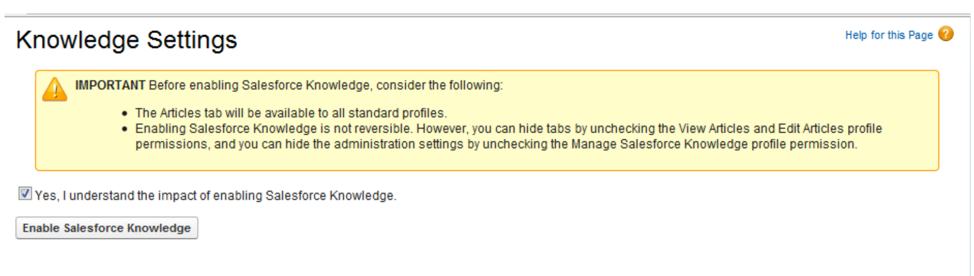

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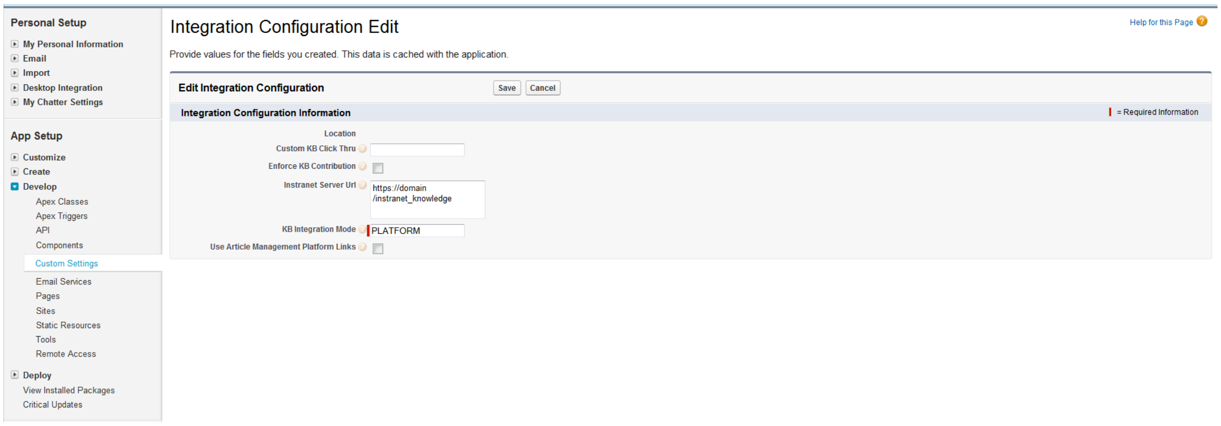

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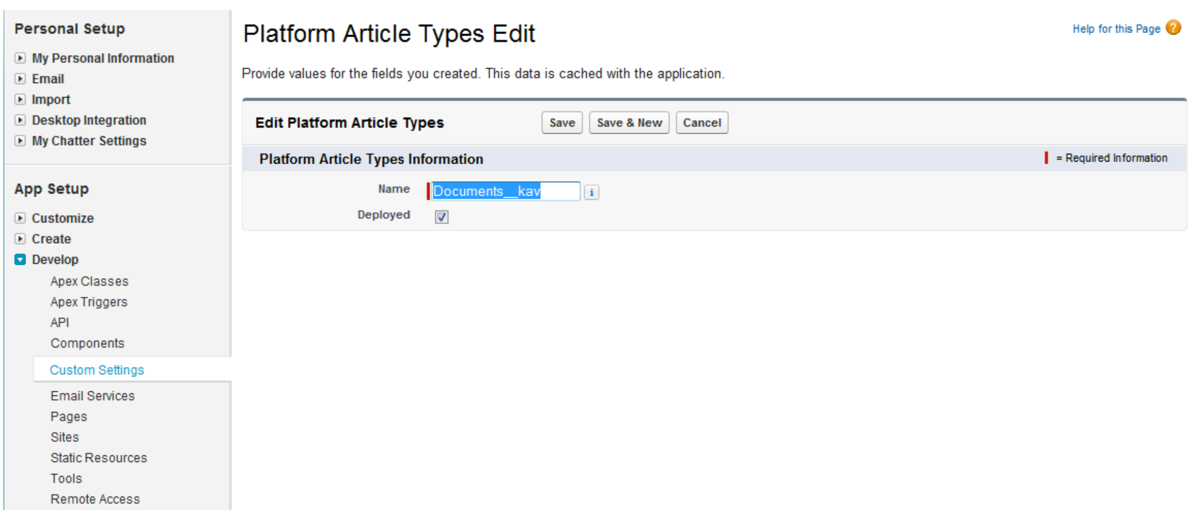

Training Wizard for Rapid Response Email with Knowledge Sharing

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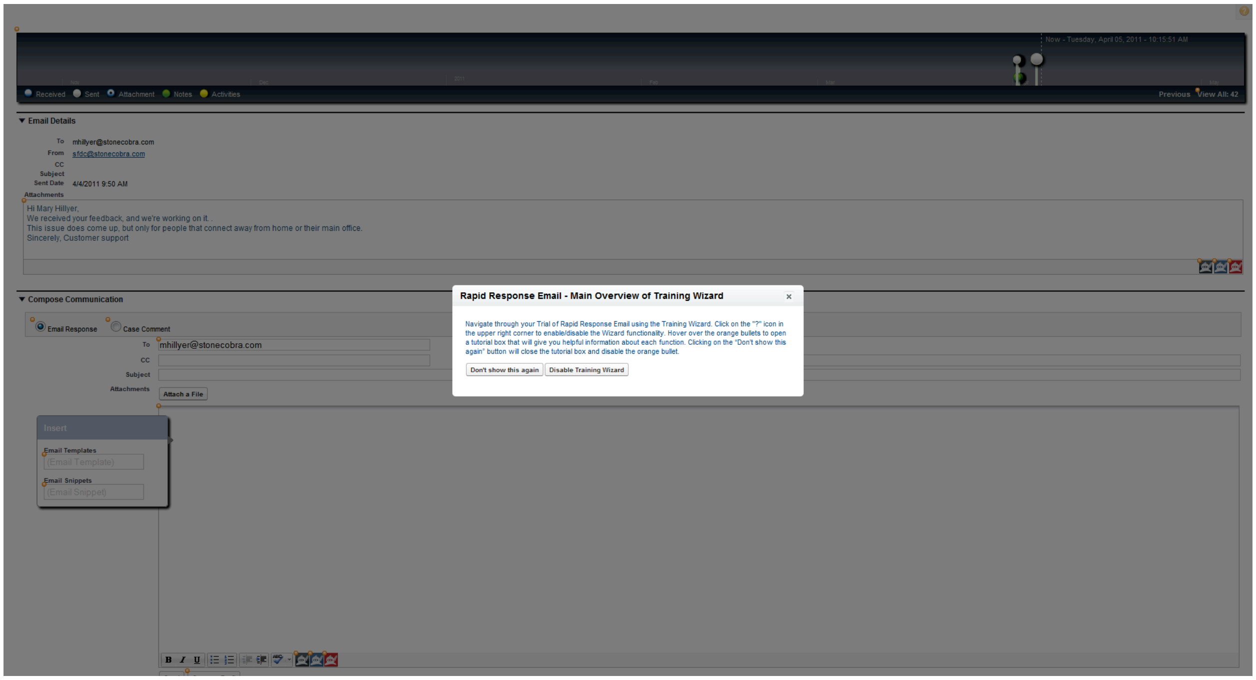

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