

CommentBox

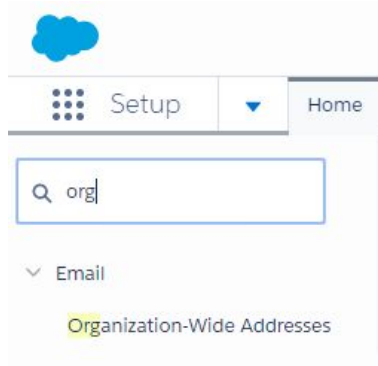
Setup

Email Setup

The configuration for CommentBox is very simple. Firstly, ensure email-to-case is enabled for your organisation and then install CommentBox from the link below

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000DmgRRUAZ>

Once installed, navigate to Organization-Wide Addresses within the Setup Menu:



16th September 2017

Michael Holt

@SalesforceMicky

Add a new Organization-Wide Email Address, note that the Display Name **must** be “CommentBox”. The address should match the email address used for Email-To-Case:

Email-To-Case

Routing Addresses					
				New	Email2Case ▼
Action	Source	Routing Name	Case Owner	Email Address	Verification
Edit Del	Email2Case	Default		michaelholt@.com	Verified

Org-Wide Email

Organization-Wide Email Addresses			Add
Actions	Display Name	Email Address	
Edit Del	CommentBox	michaelholt@.com	

Page Setup

Use the lightning app builder to drag the CommentBox component onto the page layout. We also recommend including the Case Comment related list on the page layout

Lightning App Builder - Case Record Page

Desktop Shrink To View Refresh

Lightning Components

Search components...

- Chatter Feed
- Chatter Publisher
- Filter List
- Flow
- Highlights Panel
- Recent Items
- Recommendations
- Record Detail
- Related List
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Tabs
- Trending Topics
- Visualforce

▼ Custom (0)
No components available.

▼ Custom - Managed (2)

- CommentBox
- CommentBoxUtility

Case Details

Case Number: 00001000 Case Owner: Michael Holt

Status: Working Priority: High

Subject: Starting generator after electrical failure

Description:

Contact Details

Name: Ms. Michael Holt

Title: SVP, Procurement Account Name: Edge Communications

Email: michael@example.com Phone: (512) 757-6000

Cases for Parent Contact (2)

00001026 Subject: (#908719304) Gmail Forwarded Priority: Medium Date/Time: 16/09/2017 15:05

Starting generator after electrical failure

FEED DETAILS COMMENTBOX

00001000 Starting generator after electrical failure

Michael Holt To Addresses: michaelholt@example.com;michael@example.com

CC Addresses: marc@example.com

BCC Addresses:

Email Case Followers: CC: michael.holt@salesforce.com;

Templates

Select a Folder: -None-

Send

16th September 2017
Michael Holt
@SalesforceMicky

Lightning Console Setup

The utility app provided with CommentBox allows users to receive notifications within Salesforce the moment a new case comment is added to one of their cases. A history of cases with new comments is kept within the component and allows click-through straight to the cases.

To configure this, create a new Lightning App with Console Navigation under App Manager, or edit an existing Console App, such as the Service Console. Select the Utility Bar tab and add a new Utility Bar Item

The screenshot displays the 'Edit App' configuration page in Salesforce. The 'UTILITY BAR' tab is active, showing a list of utility bar items on the left and their properties on the right. The 'History' item is selected, and its properties are being configured.

Utility Bar Items:

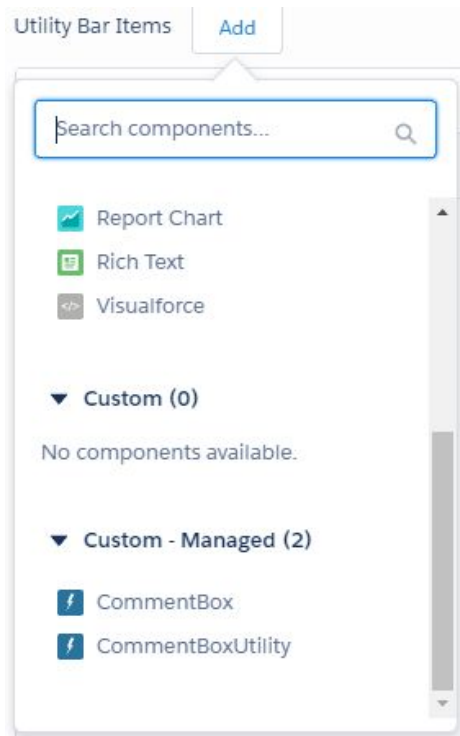
- History (selected)
- Notes

Properties for History:

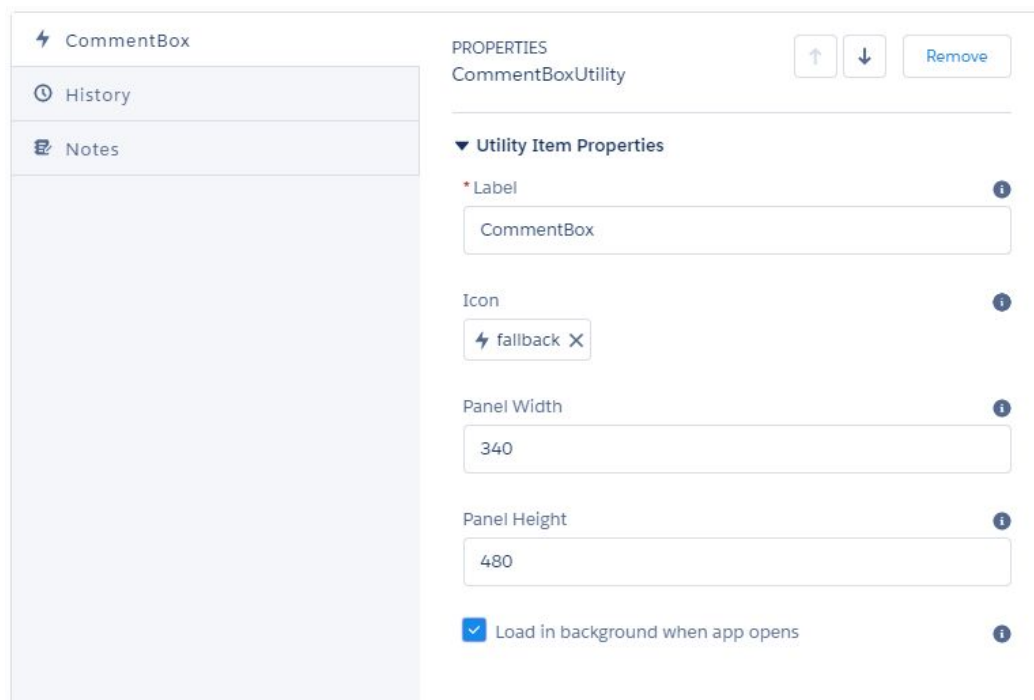
- Label:** History
- Icon:** clock
- Panel Width:** 340
- Panel Height:** 480

Buttons: Add, Remove, Cancel, Save

Scroll to the bottom and add the “CommentBoxUtility” component



Give the item a label, such as CommentBox and ensure the “Load in background when app opens” option is selected:



Success!

Users will now receive notifications on cases they own when they are working anywhere in the console. A log will be kept under the utility component and users can switch notifications off, should they wish. The great features of CommentBox will be available on the case page layout, and any new case comments will automatically be added to the case comment related list!

The screenshot displays the Salesforce Console interface with the following components:

- All Open Cases:** A list of cases with columns for Case Number, Subject, Case Owner, and Status. Cases include 00001000 (Starting generator after electrical failure), 00001002 (Seeking guidance on electrical wiring installation for GC5060), and 00001016 (Maintenance guidelines for generator unclear).
- Case Details:** A detailed view of Case 00001000, showing fields for Case Number, Case Owner (Michael Holt), Status (Working), Priority (High), Subject (Starting generator after electrical failure), and Description.
- Contact Details:** Information for the contact Ms. Michael Holt, including Title (SVP, Procurement), Account Name (Edge Communications), Email (michael@example.com), and Phone ((512) 757-6000).
- Cases for Parent Contact (2):** A list of cases related to the contact, including Case 00001026 with subject (#908719304) Gmail Forwardin... and Case 00001000.
- CommentBox:** A utility component showing a history of comments, including a comment from 00001028: Fwd: Starting generator after electrical failure[]. It includes a 'Turn Notifications Off' button.
- Email Composer:** A section for composing an email, showing the subject 'Starting generator after electrical failure', the recipient 'Michael Holt', and the email body 'Hi there, This is the second demo email. Regards, @SalesforceMicky'. It includes fields for To, CC, and BCC addresses, and a 'Send' button.
- Notification Toast:** A toast message at the top right stating 'Case Comment Received: 00001028 Fwd: Starting generator after electrical failure['] with a 'Following' button.