

Email for Case

USER GUIDE



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Introduction

Email for Case

Email for Case component has increased the use of Standard Email Template for general mailing. We can use email template to send the mail to multiple user to inform about any Case record related details. You can also send mail to the user outside the Salesforce.

Specific Business Solution

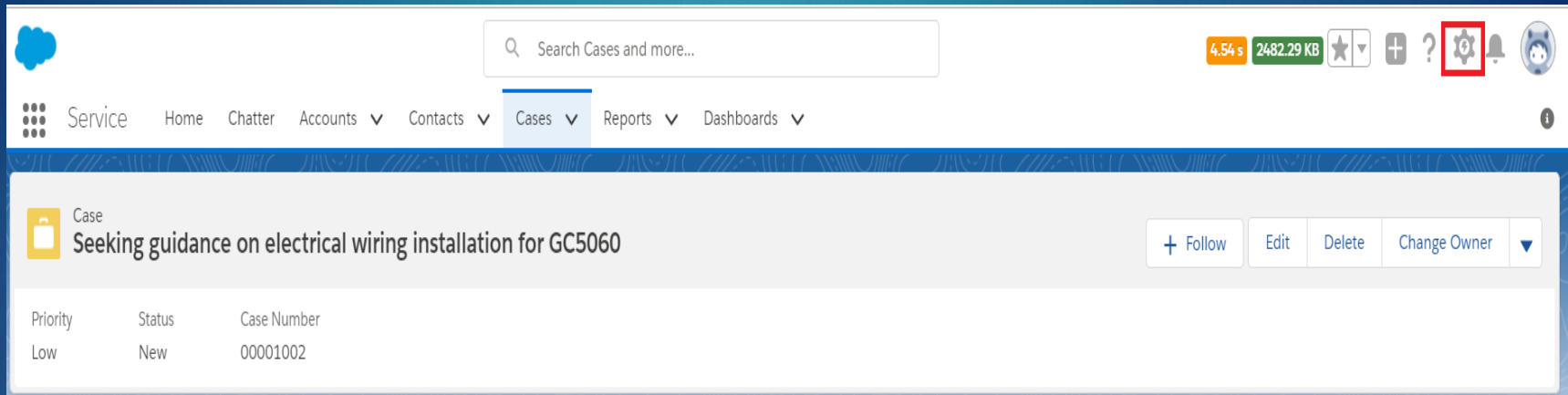
- Lightning Ready
- Email can sent to Multiple User at once.
- Users Outside the Salesforce can also be notified via email about any case detail if required.
- You can edit the email template according to your requirement.
- Can create Email Template directly on Case object.

Configuration

Open Salesforce Lightning Experience:

- ▶ Click on '**Get It Now**' button on the right side corner to install the package for Email for Case.
- ▶ Install the package for All User.
- ▶ Open any Case record detail page.

- ▶ Click on the gear on the right corner of the detail page and click on **Edit Page**.



The screenshot displays the ServiceNow user interface. At the top, there is a navigation bar with a search bar labeled "Search Cases and more...". To the right of the search bar are several utility icons: a timer showing "4.54 s", a file size indicator "2482.29 KB", a star icon, a plus icon, a question mark, a gear icon (highlighted with a red box), a bell icon, and a user profile icon. Below the navigation bar is a menu with options: Service, Home, Chatter, Accounts, Contacts, Cases (selected), Reports, and Dashboards. The main content area shows a case titled "Seeking guidance on electrical wiring installation for GC5060". To the right of the title are buttons for "+ Follow", "Edit", "Delete", and "Change Owner". Below the case title is a table with the following data:

Priority	Status	Case Number
Low	New	00001002

- ▶ Add 'CaseEmailTemplate' component to any desired place in Case record detail page.

Lightning App Builder | Pages ▾ | **Case Record Page** | ← Back | ? Help

Desktop | Shrink To View ▾ | Refresh

Save | Activation...

Lightning Components

Search components...

▼ **Standard (23)**

- Accordion
- Activities
- Chatter
- Chatter Feed
- Chatter Publisher
- Flow
- Highlights Panel
- List View
- Path
- Quip
- Recent Items
- Recommendations
- Record Detail
- Related List - Single
- Related List Quick Links

Case Record Page Preview

Case: Seeking guidance on electrical wiring installation for GC5060

Priority: Low | Status: New | Case Number: 00001002

FEED | RELATED

Post | Poll

Share an update... | Share

Latest Posts ▾ | Search this feed...

No posts on this record yet.
Post something to get the conversation going!

Write Your Email

User Name: search...

Email:

Email Template: -- None --

Salesforce Sans | 12

Send | Create Template

Page Configuration

Page: Case Record Page

*Label: Case Record Page

*Developer Name: Case_Record_Page

Page Type: Record Page

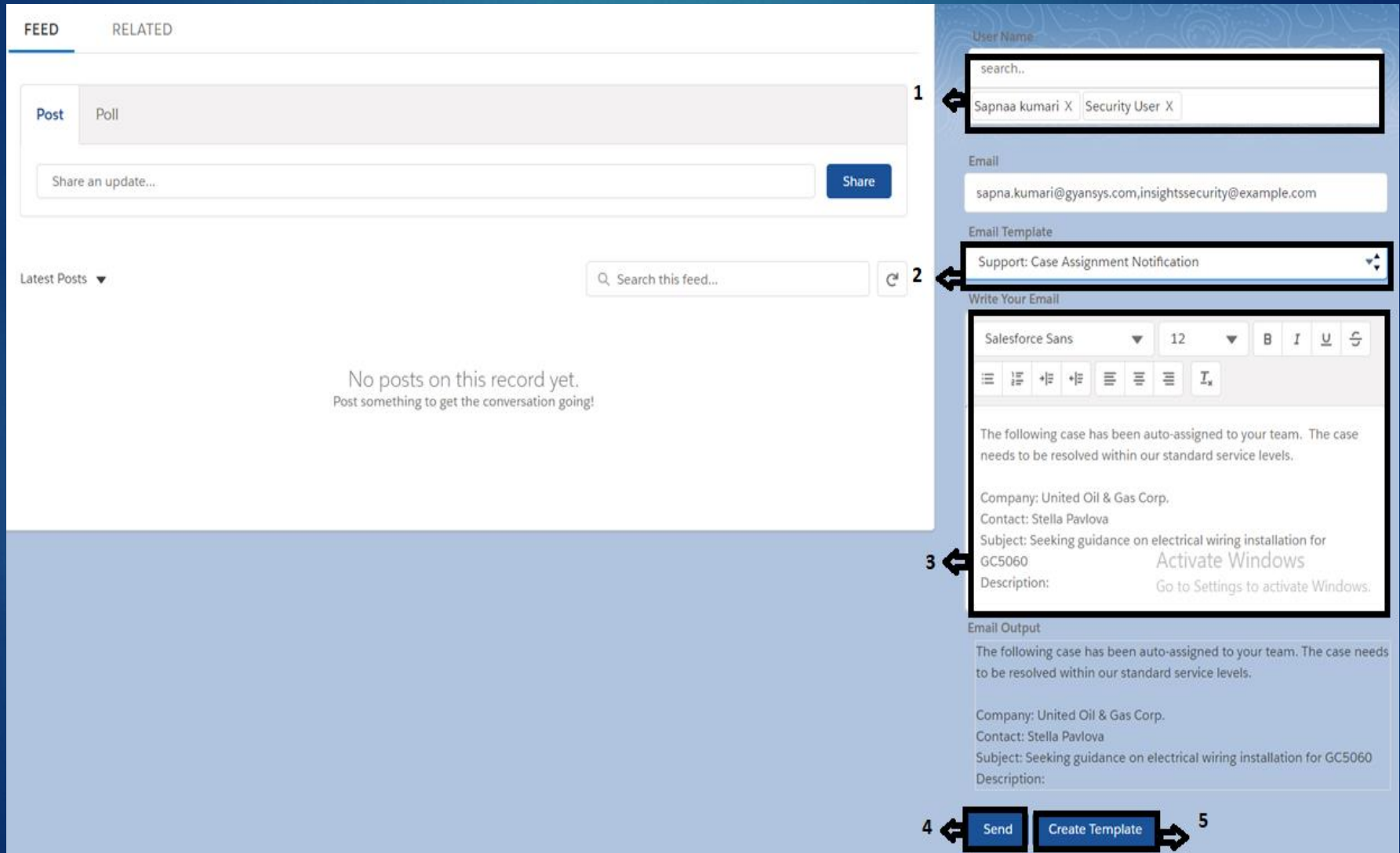
Object: Case

Template: Header and Right Sidebar

Description: Activate Windows
Go to Settings to activate Windows.

User Guide

To Email inside Case:



The screenshot displays the Salesforce interface for sending an email inside a case. The interface is divided into two main sections: **FEED** and **RELATED**.

FEED Section:

- Buttons: **Post** and **Poll**.
- Text input: **Share an update...** with a **Share** button.
- Search bar: **Search this feed...**
- Message: **No posts on this record yet. Post something to get the conversation going!**

RELATED Section:

- User Name:** search... (1)
- Email:** sapna.kumari@gyansys.com, insightssecurity@example.com
- Email Template:** Support: Case Assignment Notification (2)
- Write Your Email:**
 - Font: **Salesforce Sans**, Size: **12**, Bold: **B**, Italic: **I**, Underline: **U**, Link: **↗**
 - Buttons: **≡**, **≡**, **≡**, **≡**, **≡**, **≡**, **I**
 - Text: **The following case has been auto-assigned to your team. The case needs to be resolved within our standard service levels.**
 - Details: **Company: United Oil & Gas Corp.**, **Contact: Stella Pavlova**, **Subject: Seeking guidance on electrical wiring installation for GC5060**, **Description:**
 - Buttons: **Activate Windows**, **Go to Settings to activate Windows.**
- Email Output:**
 - Text: **The following case has been auto-assigned to your team. The case needs to be resolved within our standard service levels.**
 - Details: **Company: United Oil & Gas Corp.**, **Contact: Stella Pavlova**, **Subject: Seeking guidance on electrical wiring installation for GC5060**, **Description:**
- Buttons:** **Send** (4) and **Create Template** (5)

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1. Select the User whom you want to send mail to get their email Ids.
 2. Select the email template.
 3. Edit the template if required else leave it as it is.
 4. Send the mail.
 5. Create email Template directly on Case Object If required.

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