

Email2Case Attachment Reassign Guide

Before Installing

Make sure you've enabled Email2Case in your org, or else installation will fail.

Setup Option 1: Set Up Email-to-Case with a Guided Setup Flow:

https://help.salesforce.com/articleView?id=customizesupport_email_setup_flow.htm&type=5

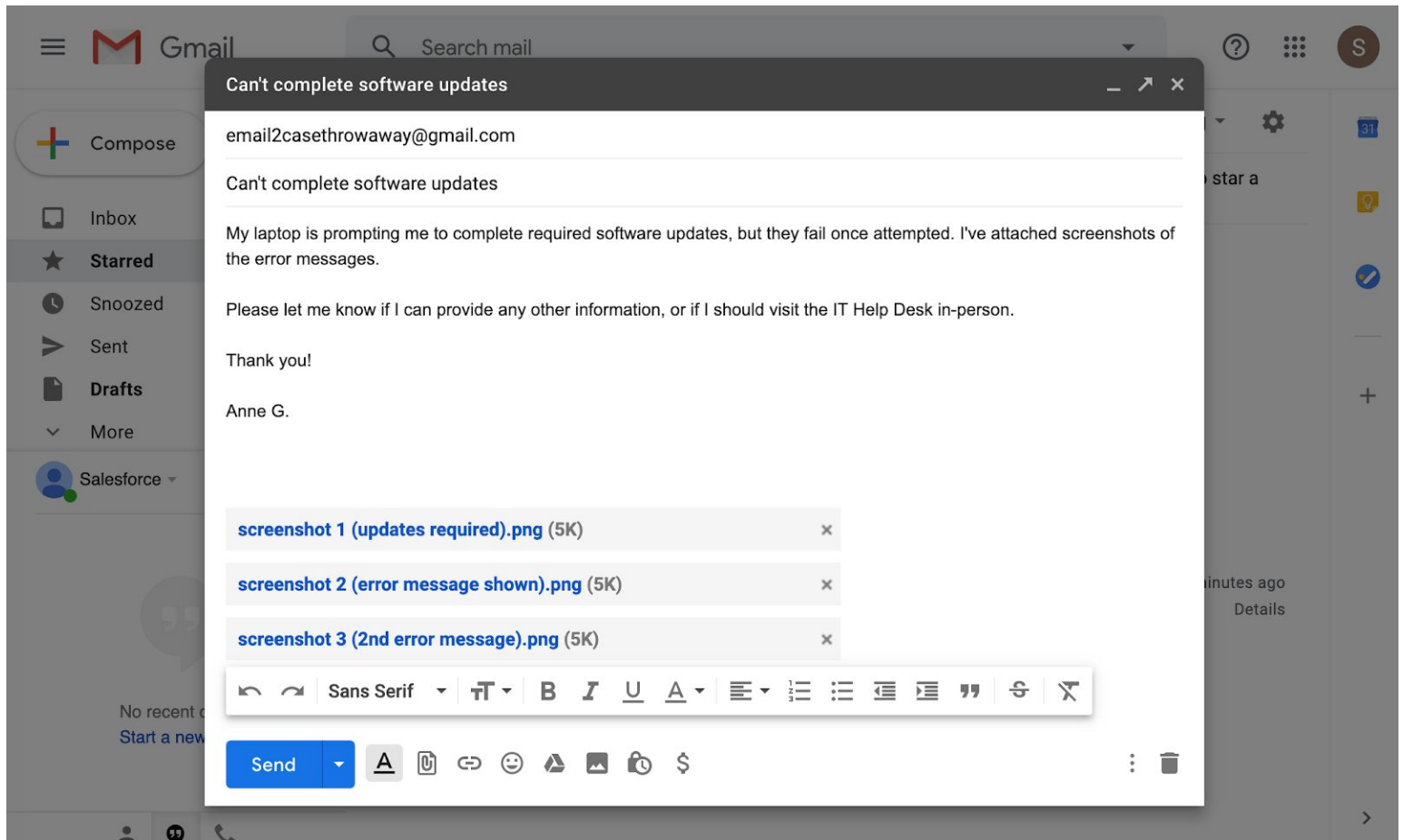
Setup Option 2: If you don't have access to Service Setup:

https://help.salesforce.com/articleView?id=customizesupport_enabling_email_to_case.htm&type=5

Overview

Once you have Email2Case set up, and have configured an email address to use for case creation, users can send emails to that address containing multiple attachments. The auto-generated case will then include these attachments automatically in the Attachments Related List section of the Case record.

Example Email:



Resulting Case:

Service

Home

Chatter

Groups

Files

Accounts

Contacts

Cases

Reports

Dashboards

All

Search Salesforce

★

+

?

⚙

🔔

Case

Can't complete software updates

+ Follow

Edit

Delete

Change Owner

Priority

Medium

Status

New

Case Number

00001008

Feed

Related

Attachments (3)

Upload Files

screenshot 3 (2nd error message)

Jan 21, 2020 · 4KB · png

screenshot 1 (updates required)

Jan 21, 2020 · 4KB · png

screenshot 2 (error message shown)

Jan 21, 2020 · 4KB · png

View All

Files (3)

Add Files

screenshot 3 (2nd error message)

Jan 21, 2020 · 4KB · png

screenshot 1 (updates required)

Jan 21, 2020 · 4KB · png

screenshot 2 (error message shown)

Jan 21, 2020 · 4KB · png

View All

Details

Additional Information

Status

New

Priority

Medium

Case Origin

Email

Contact Name

Subject

Can't complete software updates

Description

My laptop is prompting me to complete required software updates, but they fail once attempted. I've attached screenshots of the error messages.

Please let me know if I can provide any other information, or if I should visit the IT Help Desk in-person.

Thank you!

Anne G.

Files:

If you want the attachments to also be saved as Salesforce files, make sure you've checked the box 'Save Email-to-Case attachments as Salesforce Files' in the 'Email-to-Case Settings' setup page (see screenshot).

Email-to-Case Settings

Help for this Page

Email-to-Case settings for your organization

To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service. After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

Enable Email-to-Case

✓

Notify Case Owners on New Emails

✓

Enable HTML Email

✓

Set Case Source to Email

✓

Save Email-to-Case attachments as Salesforce Files

✓

Send Emails from Cases

Required Information

Insert Thread ID in the Email Subject

✓

Insert Thread ID in the Email Body

✓

Place User Signatures before Email Threads

✓

On-Demand Service

On-Demand Email-to-Case enables your organization to automatically create cases from email without having you download and install the Email-to-Case agent behind your network's firewall. Simply configure your email system to forward case submission emails to the Email Services Address provided to you by salesforce.com.