



LinkPoint for Salesforce

Outlook Integration for Salesforce

Learning Series

Creating a Case from an Email

How to create a case from an Email in Salesforce

The screenshot shows the Microsoft Outlook interface with the LinkPoint panel open. The LinkPoint panel displays a contact named Fred Johnson, President of Bedrock Ltd. Below the contact information, there is a section titled "Contact Case (3)" which lists three cases:

Case Title	Case #	Status	Priority	Origin
CRM Password incorrect	00001745	Closed	P5	Phone
Broken Mouse	00001895	Closed	P5	Phone
XP not booting	00001896	Closed	P5	Phone

The "Create Case Icon" (a blue square with a white plus sign) is highlighted in the "Contact Case (3)" section.

- To Create a Case from an Email, select the Email in Outlook.
- Select the Case Tab in the LinkPoint Panel.
- Click the “Create Case Icon”

Case Edit

Case Information

| = Required Information

Case Owner		Status	New
Lead	<input type="text"/>	Priority	P5
Contact Name	Fred Johnson	Type	-None-
Account Name	Bedrock Ltd	Case Reason	-None-
CRM Type	-None-	Case Origin	Email
Email Type	-None-		
LinkPoint Version	<input type="text"/>		
Product	-None-		

Description Information

Subject	LinkPoint Inquiry
Description	<div>From: fredlp360@gmail.com To: glehner@linkpoint360.com Received: 11/5/2010 8:30:09 AM Subject: LinkPoint Inquiry Dear Sir or Madam,</div>
Internal Comments	<div><input type="text"/></div>

- LinkPoint will open a new Case form pre-populating the Contact , Subject, and Description Information .
- You can now complete any additional data entry required and then save the new Case.



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