



# EMAIL-TO-CASE: ULTIMATE EDITION

**Transform the way you create and process cases with auto-create/update, automated triage, case deflection and AI-driven actions**

**Email to Case: Ultimate Edition** revolutionizes the way you process cases in Salesforce, by leveraging AI to automate and enhance every aspect of the case handling process. From intelligently creating cases from various communication channels to analyzing, triaging and prioritizing them with AI-driven insights, this game-changing app ensures that your service team is always ahead of the curve. It enriches each case with pertinent data, assesses sentiment, and ensures compliance with service level agreements (SLAs) - with real-time notifications keeping assigned users and other stakeholders fully informed via email, Slack, Teams or other channels.

**Datasheet**

**Version 1.0**

## KEY FEATURES



**Automated Case Creation and Update** - Instantly transform inbound emails and communications from other channels into Salesforce cases.



**Real-Time Notifications** - Keep agents promptly informed with instant alerts on new or updated cases.



**AI-Driven Case Triage and Prioritization** - Utilize advanced AI algorithms to classify and prioritize cases based on their content, urgency, and customer profile.



**Proactive SLA Monitoring** - AI-powered tracking and management of SLAs, with alerts for cases at risk of breaching agreements.



**Data Enrichment** - Automatically enhance cases with relevant data extracted from emails and external sources for a comprehensive view.



**Custom Workflow Automation** - Trigger specific, tailored actions such as sending follow-up emails or task creation based on case attributes.



**Sentiment Analysis** - Employ AI to assess the tone and sentiment of each communication, identifying critical issues that require immediate attention.



**Dynamic Case Assignment (Q-assign add-on)** - Intelligent routing of cases to the most suitable service agent based on their expertise and workload.

## BENEFITS

### Increased Operational Efficiency

Drastically reduce manual efforts in case management with automated creation, updating, and triaging.

### Improved Customer Satisfaction

Ensure swift and accurate responses to customer inquiries, elevating the overall service experience.

### Enhanced Decision Making

Utilize AI-driven insights for better prioritization and allocation of resources.

### Compliance with SLAs

Proactively monitor and manage service level agreements, minimizing breaches.

### Scalability and Flexibility

Adapt to varying workloads and case complexities with an intelligent, scalable solution.

### Improved Customer Service

Email-to-anything offers a more holistic understanding of customers, enhancing service delivery and customer relationships

## USE CASES

### **Customer Service Efficiency**

Streamline service operations by automating case creation and ensuring prompt, prioritized responses to customer inquiries.

### **Financial Services Client Engagement**

Transform client interactions in financial services with AI-enhanced case management, providing quicker and more personalized responses.

### **IT Support Optimization**

Enhance IT support with automated triage, ensuring technical issues are quickly identified and assigned to the right experts.

### **Retail Customer Experience**

Elevate the retail customer experience by quickly addressing and resolving customer queries and feedback.

### **Healthcare Patient Interaction**

Improve patient communication in healthcare by categorizing and prioritizing patient requests and inquiries.

### **Telecommunication Response Agility**

Boost response times in telecommunication services by efficiently managing customer technical issues and service requests.

**For further information please contact  
one of our Salesforce Automation Specialists**

Sales Enquiries: [sales@ortooapps.com](mailto:sales@ortooapps.com)

Technical Enquiries: [support@ortooapps.com](mailto:support@ortooapps.com)

Call: 44 (0) 20 3111 1323

**[ortooapps.com](https://ortooapps.com)**

