**PK SAFETY SUPPORT CASES**

Need email address and Case Rule for each department

• Sales

• Customer Service

• Calibration & Repair

Categories of options a Sales Rep has when closing a request received:

• Open (default)

• Existing Customer

• Existing Lead

• Unresponsive Lead

• Junk/Fraud

• Closed -NetSuite

Closing of a Ticket needs a reason

• Closed-No Response

• Closed

• Closed-Unresolved

Email Integration:

• daily emails of all outstanding cases? (saved search)

• how else would they like it integrated with Outlook?

• we can customize the HTML email templates however we would like once the support case system is working as intended

STEPS FOR PK SAFETY:

• Create Dynamic Groups of Employees for each Department (including abandoned cart email sendto group)

• How do we determine if a cart was abandoned?

• is there an email address we can match to the incoming email address?

• Check to see if email address is prospect or customer

• Criteria to determine new customer’s sales rep?

• Assign to & email appropriate Sales Rep

**MICROSOFT OUTLOOK INTEGRATION**

**Prerequisites for Setting Up Email Case Capture**

Your company mail server administrator must set up the following things on your Microsoft Exchange server:

1. A Contact to add your **NetSuite Address** to.

2. A User for the support address you will be using, for example support@ABC.com

3. Activate forwarding on the User account you created, using the credentials from the newly-created Contact.

In Outlook :

• [Create a Mail Contact](https://technet.microsoft.com/en-us/library/aa998858(v=exchg.141).aspx)

• [Create a Mail User](https://technet.microsoft.com/en-us/library/bb124381(v=exchg.141).aspx)

• [Configure Email Forwarding for a Mailbox](https://technet.microsoft.com/en-us/library/dd351134(v=exchg.150).aspx)

Create a Mail Contact

**Exchange 2010**

[Other Versions](javascript:void(0))

**Applies to:**Exchange Server 2010 SP3, Exchange Server 2010 SP2

**Topic Last Modified:**2011-04-28

Mail contacts are mail-enabled Active Directory objects that contain information about people or organizations that exist outside your Exchange organization. Each mail contact has an external e-mail address.

Looking for other management tasks related to mail contacts? Check out [Managing Mail Contacts and Mail Users](https://technet.microsoft.com/en-us/library/aa997138(v=exchg.141).aspx).

Prerequisite

If you want to create a new mail contact in a domain that is different than the one in which your Exchange servers reside, you must first prepare that domain for Exchange 2010. To learn more about preparing a domain for Exchange 2010, see [Prepare Active Directory and Domains](https://technet.microsoft.com/en-us/library/bb125224(v=exchg.141).aspx).

What Do You Want to Do?

• [Use the EMC to create a mail contact](https://technet.microsoft.com/en-us/library/aa998858(v=exchg.141).aspx#UseEMC)

• [Use the Shell to create a mail contact](https://technet.microsoft.com/en-us/library/aa998858(v=exchg.141).aspx#UseShell)

Use the EMC to create a mail contact

You need to be assigned permissions before you can perform this procedure. To see what permissions you need, see the "Mail contacts" entry in the [Mailbox Permissions](https://technet.microsoft.com/en-us/library/dd638132(v=exchg.141).aspx) topic.

1. In the console tree, click **Recipient Configuration**.

2. In the action pane, click **New Mail Contact**.

3. On the **Introduction** page, under **Create a mail contact for**, select one of the following options.

**◦ New contact**    This button is selected by default. Click this button to create and mail-enable a new contact. If you click this button, you'll need to provide the required account information for the contact on the **Contact Information** page of this wizard.

**◦ Existing contact**   Click this button to mail-enable an existing contact in Active Directory. Click **Browse** to open the **Select Contact** dialog box. This dialog box displays a list of all contacts in the forest that aren't mail-enabled. Select the contact that you want, and then click **OK** to return to the wizard.

4. If you selected **New Contact** in Step 3, complete the following fields on the **Contact Information** page. Otherwise skip to Step 5:

**◦ Specify the organizational unit rather than using a default one** Select this check box to select an organizational unit (OU) other than the default (which is the recipient scope). If the recipient scope is set to the forest, the default value is set to the **Users** container in the Active Directory domain that contains the computer on which the Exchange Management Console is running. If the recipient scope is set to a specific domain, the **Users** container in that domain is selected by default. If the recipient scope is set to a specific OU, that OU is selected by default. To select a different OU, click **Browse** to open the **Select Organizational Unit** dialog box. This dialog box displays all OUs in the forest that are within the specified scope. Select the desired OU, and then click **OK**. To learn more about recipient scopes, see [Understanding Recipient Scope](https://technet.microsoft.com/en-us/library/aa996861(v=exchg.141).aspx).

**◦ First name**   Use this box to type the contact's first name. This field is optional.

**◦ Initials**   Use this box to type the contact's initials. This field is optional.

**◦ Last name**   Use this box to type the contact's last name. This field is optional.

**◦ Name**Use this box to type a name for the contact. This is the name that's listed in Active Directory. By default, this box is populated with the names you enter in the **First name**, **Initials**, and **Last name** boxes. If you didn't use those boxes, you must still type a name in this field. The name can't exceed 64 characters.

**◦ Alias**Use this box to type a unique alias (64 characters or less) for the contact. This field is required.

**◦ External e-mail address**   To specify the external e-mail address, perform one of the following tasks:  
To specify a SMTP e-mail address, click **Edit**. In the **SMTP address**dialog box, type the SMTP e-mail address.

|  |
| --- |
| ◦   To specify a custom e-mail address, click the arrow next to **Edit**, and then click **Custom Address**. In the **Custom Address** dialog box, use the **E-mail address** box to type the e-mail address and the **E-mail type**box to specify the e-mail type. For example, you can specify an X.400, GroupWise, or Lotus Notes address. |
| ◦ Exchange validates SMTP addresses for proper formatting. If your entry is inconsistent with the SMTP format, an error message will be displayed when you click **OK**. |

5. On the **New Mail Contact** page, review your configuration settings. To make changes, click **Back**. To create the new mail contact, click **New**. Click **Cancel** to close the wizard without creating the new mail contact.

6. On the **Completion** page, review the following, and then click **Finish** to close the wizard:

◦ A status of **Completed** indicates that the wizard completed the task successfully.

◦ A status of **Failed** indicates that the task wasn't completed. If the task fails, review the summary for an explanation, and then click **Back** to make any configuration changes.

7. Click **Finish** to close the wizard.

Use the Shell to create a mail contact

You need to be assigned permissions before you can perform this procedure. To see what permissions you need, see the "Mail contacts" entry in the [Mailbox Permissions](https://technet.microsoft.com/en-us/library/dd638132(v=exchg.141).aspx) topic.

This example creates a mail contact for Ted Bremer.

New-MailContact -Name "Ted Bremer" -ExternalEmailAddress ted@tailspintoys.com -OrganizationalUnit contoso.com

This example mail-enables an existing contact named David.

Enable-MailContact -Identity David -ExternalEmailAddress David@thirdcoffee.com

Create a Mail User

**Exchange 2010**

[Other Versions](javascript:void(0))

**Applies to:**Exchange Server 2010 SP3, Exchange Server 2010 SP2

**Topic Last Modified:**2011-04-28

Mail users are similar to mail contacts. Both have external e-mail addresses and both contain information about people outside your Exchange Server 2010 organization that can be displayed in the global address list (GAL) and other address lists. However, unlike a mail contact, a mail user has Active Directory logon credentials and can access resources.

Looking for other management tasks related to mail users? Check out [Managing Mail Contacts and Mail Users](https://technet.microsoft.com/en-us/library/aa997138(v=exchg.141).aspx).

Prerequisite

If you want to create a mail user in a domain that is different than the one in which your Exchange servers reside, you must first prepare that domain for Exchange 2010. To learn more about preparing a domain for Exchange 2010, see [Prepare Active Directory and Domains](https://technet.microsoft.com/en-us/library/bb125224(v=exchg.141).aspx).

What Do You Want to Do?

• [Use the EMC to create a mail user](https://technet.microsoft.com/en-us/library/bb124381(v=exchg.141).aspx#UseEMC)

• [Use the Shell to create a mail user](https://technet.microsoft.com/en-us/library/bb124381(v=exchg.141).aspx#UseShell)

Use the EMC to create a mail user

You need to be assigned permissions before you can perform this procedure. To see what permissions you need, see the "Mail users" entry in the [Mailbox Permissions](https://technet.microsoft.com/en-us/library/dd638132(v=exchg.141).aspx) topic.

1. In the console tree, click **Recipient Configuration**.

2. In the action pane, click **New Mail User**.

3. On the **Introduction** page, select the type of user that you want to create or mail-enable.

**◦ New user**   This button is selected by default. Click this button to create a new user account for the mail user. This allows you to provision the user account and mail-enable it simultaneously.  
If you click this button, you'll need to provide the required user account information on the **User Information** page of this wizard.

**◦ Existing user**   Click this button to mail-enable an existing user account in Active Directory. Click **Browse**to open the **Select User** dialog box. This dialog box displays a list of user accounts in the forest that aren't mail-enabled or don't have Exchange mailboxes. Select the user account you want, and then click **OK**to return to the wizard.

4. If you selected **New User** in Step 3, complete the following fields on the **User Information** page. Otherwise skip to Step 5:

**◦ Specify the organizational unit rather than using a default one** Select this check box to select an organizational unit (OU) other than the default (which is the recipient scope). If the recipient scope is set to the forest, the default value is set to the **Users** container in the Active Directory domain that contains the computer on which the Exchange Management Console is running. If the recipient scope is set to a specific domain, the **Users** container in that domain is selected by default. If the recipient scope is set to a specific OU, that OU is selected by default. To select a different OU, click **Browse** to open the **Select Organizational Unit** dialog box. This dialog box displays all OUs in the forest that are within the specified scope. Select the desired OU, and then click **OK**. To learn more about recipient scopes, see [Understanding Recipient Scope](https://technet.microsoft.com/en-us/library/aa996861(v=exchg.141).aspx).

**◦ First name**   Use this box to type the user's first name. This field is optional.

**◦ Initials**   Use this box to type the user's middle initials. This field is optional.

**◦ Last name**   Use this box to type the user's last name. This field is optional.

**◦ Name**   Use this box to type a name for the user. This is the name that's listed in Active Directory. By default, this box is populated with the names you enter in the **First name**, **Initials**, and **Last name** boxes. If you didn't use those boxes, you must still type a name in this field. The name can't exceed 64 characters.  
**User logon name (User Principal Name)**   Use this box to type the name that the user will use to log on to the mailbox. The user logon name consists of a user name and a suffix. Typically, the suffix is the domain name in which the user account resides. This name can't exceed 1,024 characters and must be unique in the forest.

**◦ User logon name (pre-Windows 2000)**   Use this box to type the name for the user that is compatible with the legacy versions of Microsoft Windows (prior to the release of Windows 2000 Server). This field is automatically populated based on the **User logon name (User Principal Name)**field. This name can't exceed 20 characters and must not contain any of the following characters: **\/ []**:**|<> + = ; ? , \***.

**◦ Password**   Use this box to type the password for the user.

|  |
| --- |
| ◦ |
| ◦ Make sure that the password you supply complies with the password length, complexity, and history requirements of the domain in which you are creating the user account. |

**◦ Confirm password**   Use this box to confirm the password that you typed in the **Password** box.

**◦ User must change password at next logon**   Select this check box if you want the user to reset the password when they first logon to the mailbox.  
If you select this check box, at first logon, the new user will be prompted with a dialog box in which to change the password. The user won't be allowed to perform any tasks until the password is successfully changed.

5. On the **Mail Settings** page, complete the following fields:

**◦ Alias**   Use this text box to type the alias of the user. The alias can't exceed 64 characters and must be unique in the forest.

**◦ External e-mail address**   To specify the external e-mail address, perform one of the following tasks:  
To specify a SMTP e-mail address, click **Edit**. In the **SMTP address**dialog box, type the SMTP e-mail address.

|  |
| --- |
| ◦   To specify a custom e-mail address, click the arrow next to **Edit**, and then click **Custom Address**. In the **Custom Address** dialog box, use the **E-mail address** box to type the e-mail address and the **E-mail type**box to specify the e-mail type. For example, you can specify an X.400, GroupWise, or Lotus Notes address. |
| ◦ Exchange validates SMTP addresses for proper formatting. If your entry is inconsistent with the SMTP format, an error message will be displayed when you click **OK**. |

6. On the **New Mail User** page, review your configuration settings. To make changes, click **Back**. To create the new mail user, click **New**. Click **Cancel** to close the wizard without creating the new mail contact.

7. On the **Completion** page, review the following, and then click **Finish** to close the wizard:

◦ A status of **Completed** indicates that the wizard completed the task successfully.

◦ A status of **Failed** indicates that the task wasn't completed. If the task fails, review the summary for an explanation, and then click **Back** to make any configuration changes.

Use the Shell to create a mail user

You need to be assigned permissions before you can perform this procedure. To see what permissions you need, see the "Mail users" entry in the [Mailbox Permissions](https://technet.microsoft.com/en-us/library/dd638132(v=exchg.141).aspx) topic.

This example creates the mail user Ted Bremer with the external e-mail address ted@tailspintoys.com.

New-MailUser -Name Ted -FirstName Ted -LastName Bremer -ExternalEmailAddress ted@tailspintoys.com -UserPrincipalName ted@contoso.com -Password Pass@word1

Configure email forwarding for a mailbox

**Exchange 2013**

[Other Versions](javascript:void(0))

**Applies to:**Exchange Online, Exchange Server 2013

**Topic Last Modified:**2016-12-09

Email forwarding lets you to set up a mailbox to forward email messages sent to that mailbox to another user’s mailbox in or outside of your organization.

|  |
| --- |
| **Important:** |
| If you're using Office 365 for business, you should configure email forwarding in the [Office 365 admin center: Configure email forwarding in Office 365](https://go.microsoft.com/fwlink/p/?LinkId=834774) |

If your organization uses an on-premises Exchange or hybrid Exchange environment, you should use the on-premises Exchange admin center (EAC) to create and manage shared mailboxes.

Use the Exchange admin center to configure email forwarding

You can use the Exchange admin center (EAC) set up email forwarding to a single internal recipient, a single external recipient (using a mail contact), or multiple recipients (using a distribution group).

You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Recipient Provisioning Permissions" entry in the [Recipients Permissions](https://technet.microsoft.com/en-us/library/dd638132(v=exchg.150).aspx) topic.

1. In the EAC, navigate to **Recipients** > **Mailboxes**.

2. In the list of user mailboxes, click or tap the mailbox that you want to configure mail forwarding for, and then click or tap **Edit**.

3. On the mailbox properties page, click **Mailbox Features**.

4. Under **Mail Flow**, select **View details** to view or change the setting for forwarding email messages.  
On this page, you can set the maximum number of recipients that the user can send a message to. For on-premises Exchange organizations, the recipient limit is unlimited. For Exchange Online organizations, the limit is 500 recipients.

5. Check the **Enable forwarding** check box, and then click or tap **Browse**.

6. On the **Select Recipient** page, select a user you want to forward all email to. Select the **Deliver message to both forwarding address and mailbox** check box if you want both the recipient and the forwarding email address to get copies of the emails sent. Click or tap **OK**, and then click or tap **Save**.

What if you want to forward mail to an address outside your organization? Or forward mail to multiple recipients? You can do that, too!

**• External addresses**Create a mail contact and then, in the steps above, select the mail contact on the **Select Recipient** page. Need to know how to create a mail contact? Check out [Manage mail contacts](https://technet.microsoft.com/en-us/library/aa998858(v=exchg.150).aspx).

**• Multiple recipients**Create a distribution group, add recipients to it, and then in the steps above, select the mail contact on the **Select Recipient** page. Need to know how to create a mail contact? Check out [Create and manage distribution groups](https://technet.microsoft.com/en-us/library/bb124513(v=exchg.150).aspx).

How do you know this worked?

To make sure that you’ve successfully configured email forwarding, do one of the following:

1. In the EAC, go to **Recipients** > **Mailboxes**.

2. In the list of user mailboxes, click or tap the mailbox that you configured email forwarding for, and then click **Edit**.

3. On the mailbox properties page, click or tap **Mailbox Features**.

4. Under **Mail Flow**, click or tap **View details** to view the mail forwarding settings.