

Unbabel for Service Cloud

Installation Guide

Document Purpose

This document presents a walkthrough on the installation process for the Salesforce Unbabel for Service Cloud App.

Audience

The audience for this document are Salesforce professionals with technical skills, for example developers, admins, etc.

Requirements

Here we describe the requirements for using the Unbabel Integration for Salesforce.

Unbabel Package

In order to guarantee the correct installation, we advise that these steps are followed by a **user with a System Administrator profile or equivalent**.

Customer Environment

Please check if you have the features below enabled in order to use our standard flow:

- Service Cloud
- Email Deliverability access level set to "All email"
- Have "Enable Case Feed Actions and Feed Items" enabled
- All agents should have access to the Case Feed
- If you are using the Lightning Experience make sure you have my Domain deployed for all of your users
- Email-to-Case (Recommended/optional)
- Web-to-Case (Recommended/optional)

Limitations:

- Lightning Email templates are supported, with some limitations in terms of searchability by folder.
- Quick Text is supported, with some limitations in terms of searchability by folder.

If you don't have all the required features please contact us so that we can validate that your use case is supported.

Integration usage and limits

The usage of our package is bound to some Salesforce limits:

- The translated emails are sent through apex (Single Email) and these count against the Org wide limit, typically 5000, but please check your own organization limit.
- Each translation spends an API call to Salesforce and these count against the 24h API Calls limits on your Organization.

Package Installation

Unbabel Connector

Installation URL

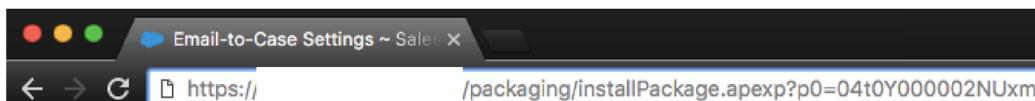
[your Salesforce Org URL]/[packaging/installPackage.apexp?p0=04t1n000002Guac](#)

We will need to install the **Unbabel for Service Cloud** package:

- **Url:** [your Salesforce Org URL]/[packaging/installPackage.apexp?p0=04t1v000002GzAQ](#)
- **Version:** v1.59

Please follow the steps:

1. Copy the **url** above into a browser where you have already log in into the target Salesforce Org. Press the **enter** key:



2. This screen will appear and you should select **Install for Admins Only**, or the option that best suits your organization needs. Click the blue **Install** button:

Three radio button options for installation scope:

- ☒ Install for Admins Only
- ☐ Install for All Users
- ☐ Install for Specific Profiles...

- The complete screen below will show up when the installation is finished. Click the **Done** button as the configurations will be performed later on the guide.

Install Unbabel Service Cloud
By Unbabel for Service Cloud

Installation Complete!
Please review the instructions below to properly configure this app. [View in another browser](#)

Unbabel Search... Salesforce Admin Setup Help & Training

Home Knowledge Article Management Translation Requests Unbabel - Configuration Menu

Create New... Recent Items

- Salesforce Admin
- TR-002200318
- TR-002210318
- TR-002190318
- TR-002170318
- TR-002130318
- TR-002120318
- TR-002150318
- TR-002140318
- TR-002100318

Unbabel - SC Configurations Menu

Save

Unbabel Configurations

Automatic Translations <input checked="" type="checkbox"/>	Remove original message from email <input type="checkbox"/>
Do not translate Original Message <input type="checkbox"/>	Hide Translated Email <input type="checkbox"/>
Signature Parser <input type="checkbox"/>	Queue Language Arabic

Done

Add Permissions

Our package has 2 Permission Sets:

- **Unbabel SC Permissions - Admins**
- **Unbabel SC Permissions - Agents**

Add the **Unbabel SC Permissions - Admins** Permission to the Admin/Integration user performing the installation by following the steps:

- Click on the **Setup** link, search for **Permission Sets** in the **Quick Find** search box and click on the **Permission Sets** link:

Classic

Unbabel Search... Setup Help & Training Unbabel KB

Home Knowledge Article Management Translation Requests Unbabel - Configuration Menu Unbabel KB - Configuration Menu Reports Dashboards

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permission

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	Unbabel for Live Agent	Unbabel for Live Agent	1.1	unbabelli	09/03/2018 12:10	✓	0	1	2
Uninstall	Unbabel Service Cloud	Unbabel for Service Cloud	1.10	unbabelsc	13/03/2018 11:24	✓	1	1	4
Uninstall	Unbabel Knowledge Base	Unbabel for Knowledge Base	1.13	unbabelkb	12/03/2018 17:12	✓	2	1	2
Uninstall	Unbabel Connector	Unbabel API	1.10	unbabelapi	01/03/2018 17:05	✓	1	2	3

Lightning

Setup Home Object Manager

permission sets

Users

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, and data...	Analytics Platform
Clone	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.	Analytics Platform
Clone	Sales Cloud Einstein Analytics	View and manage Sales Cloud Einstein Analytics	Analytics Template Administration
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Unbabel API Permissions		
Clone	Unbabel KB Permissions		
Clone	Unbabel LA Permissions		
Clone	Unbabel SC Permissions	Permissions for Unbabel Service Cloud extension	

2. Find the **Unbabel SC Permissions - Admins** and click the link:

Unbabel Search... Setup Help & Training Unbabel KB

Home Knowledge Article Management Translation Requests Unbabel - Configuration Menu Unbabel KB - Configuration Menu Reports Dashboards

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Quick Find / Search...

Expand All | Collapse All

Lightning Experience Migration Assistant

Get Started

Salesforce Mobile Quick Start

Home

Administer

Manage Users

Users

Adoption Manager

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, data...	Analytics Platform
Clone	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.	Analytics Platform
Clone	Sales Cloud Einstein Analytics	View and manage Sales Cloud Einstein Analytics	Analytics Template Administration
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Unbabel API Permissions		
Clone	Unbabel KB Permissions		
Clone	Unbabel LA Permissions		
Clone	Unbabel SC Permissions	Permissions for Unbabel Service Cloud extension	

3. Click the **Manage Assignments**:


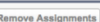
Permission Set Unbabel SC Permissions

Find Settings...   



4. Click the **Add Assignments** button:

Assigned Users
Unbabel SC Permissions
◀ Back to: Permission Set


A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**



Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
No records to display.							



5. Add the Admin/Integration user performing the installation and click **Assign**:

Assign Users
All Users
View: **All Users**  Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**


Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input checked="" type="checkbox"/> Edit	Admin_Salesforce	SAdmin	salesforce-admin@unbabel.com.stagging	13/03/2018 11:05		✓	System Administrator
<input checked="" type="checkbox"/> Edit	Agent one	A_One	bernardo@unbabel.com.agentone	09/03/2018 16:54		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d1r000000rxifeae.iget7ozzh5dt@chatter.salesforce.com			✓	Chatter Free User
<input checked="" type="checkbox"/> Edit	Emanuel	emanuel	emanuel@unbabel.com.staging	09/03/2018 18:38		✓	System Administrator


 

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**


6. Click **Done**:

Assignment Summary
Unbabel SC Permissions

 Permission set Unbabel SC Permissions has been assigned to 3 users.



Full Name	Username	User License	Message
Salesforce Admin	salesforce-admin@unbabel.com.stagging	Salesforce	Success
Emanuel	emanuel@unbabel.com.staging	Salesforce	Success
Agent one	bernardo@unbabel.com.agentone	Salesforce	Success



After this, please perform the same steps for the Permissions Set **Unbabel SC Permissions - Agents**. When assigning permissions add all the Agent users that will be using Unbabel.

NOTE:

- Please make sure that you also add all the users configured on your automated processes like for example Web-to-Case or Email-to-Case to the Permissions Set **Unbabel SC Permissions - Agents**.

- Please assign the Integration User used when installing the Unbabel Connector package to the **Unbabel SC Permissions - Admins**.

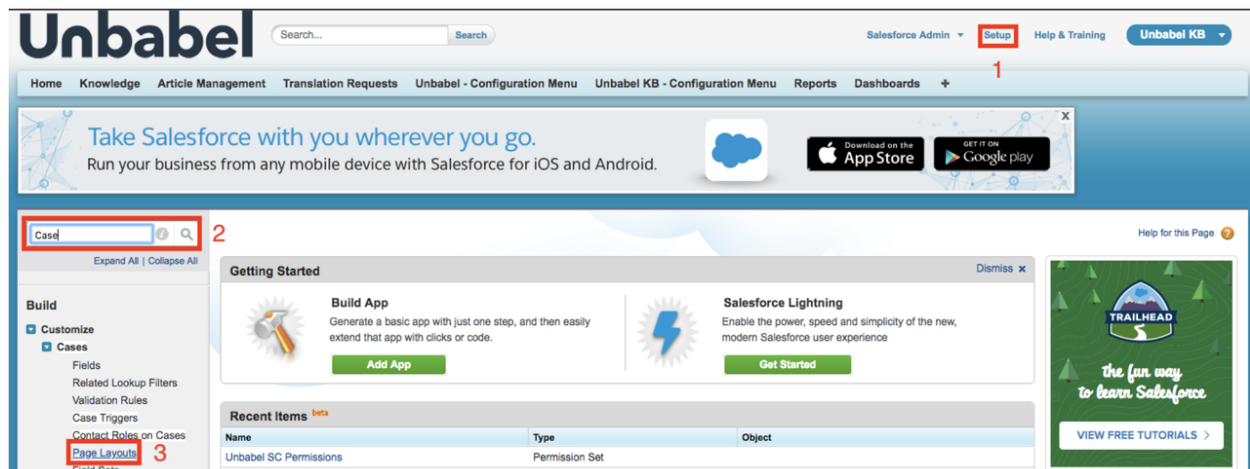
Configure Page Layouts

Case Page Layouts

Navigate to the Cases page layout by following the steps:

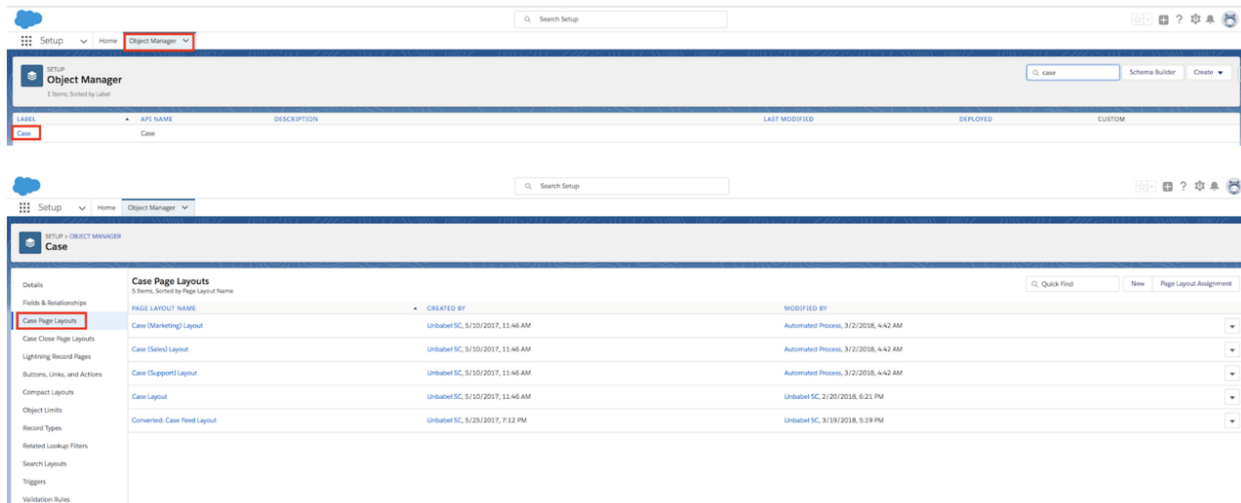
On Classic

1. Click the **Setup** link and search for **Case**.
2. Click on the **Page Layouts** link.



On Lightning

1. Go to **Object Manager**, search and click on **Case**. Open **Case Page layouts**.



Then on the **Page Layout** page:

1. Click the **Edit** link next to the **Case Page Layout** you will be modifying. Make sure it is a Feed-Based Layout.

Case Page Layout

[Help for this Page](#)

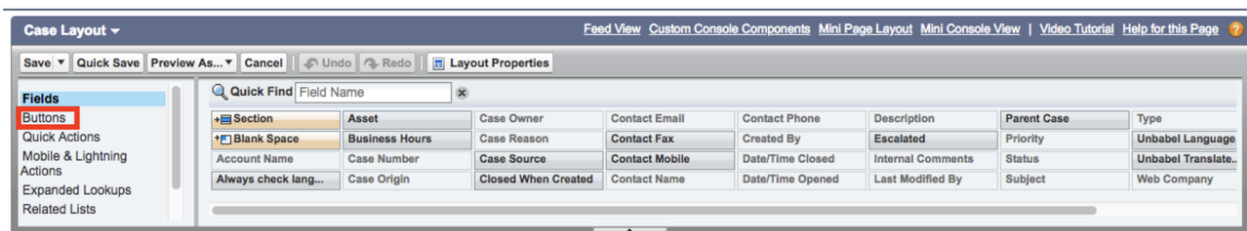
This page allows you to create different page layouts to display Case data.

After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Case Page Layouts				
New Page Layout Assignment				
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Case Layout	Salesforce Admin, 01/03/2018 16:59	Salesforce Admin, 13/03/2018 11:22	<input checked="" type="checkbox"/>

Case Close Page Layouts				
New Page Layout Assignment				
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Close Case Layout	Salesforce Admin, 01/03/2018 16:59	Salesforce Admin, 01/03/2018 16:59	<input type="checkbox"/>

2. To add Unbabel Buttons, click on the **Buttons** section.



3. Add the **Translate Case** button by using drag and drop to the specific region.

Case Layout ▾ Feed View Custom Console Components Mini Page Layout Mini Console View Video Tutorial

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find Button Name *

Change Owner Delete Translate Case

Change Record Type Edit

Clone Sharing

Close Case Submit for Approval

Case Sample

Highlights Panel

Customer Case Number GEN-2004-001234 Created Date 13/03/2018 11:46 Status Sample

Sample Contact Priority Sample

Sample Account Case Owner Sample

1-415-555-1212

Sample Description

Quick Actions in the Salesforce Classic Publisher

Post Email Email Log a Call Change Status File Link Poll

Salesforce Mobile and Lightning Experience

Actions ⓘ

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. When you override the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Case Detail

Standard Buttons Edit Delete Change Owner Change Record Type Close Case Clone Sharing

Custom Buttons Translate Case

4. Go back to the **Fields** section.

Case Layout ▾ Feed View Custom Console Components Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find Button Name *

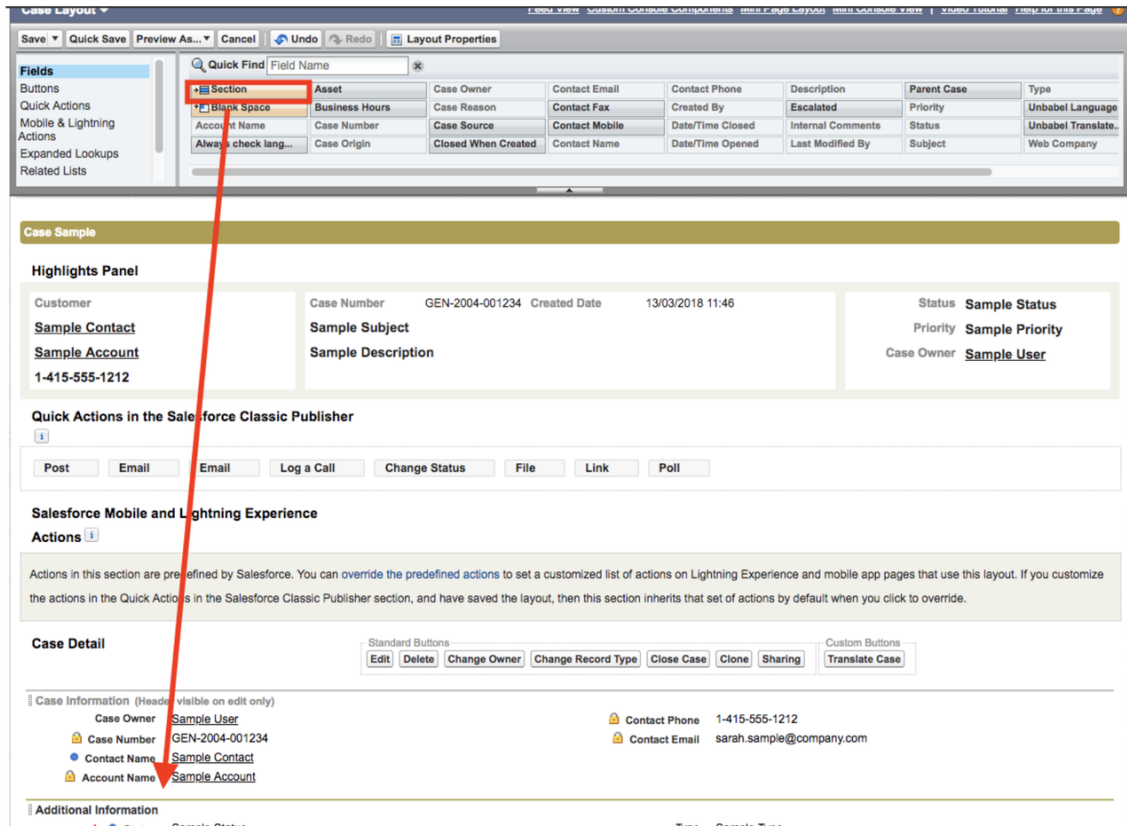
Change Owner Delete Translate Case

Change Record Type Edit

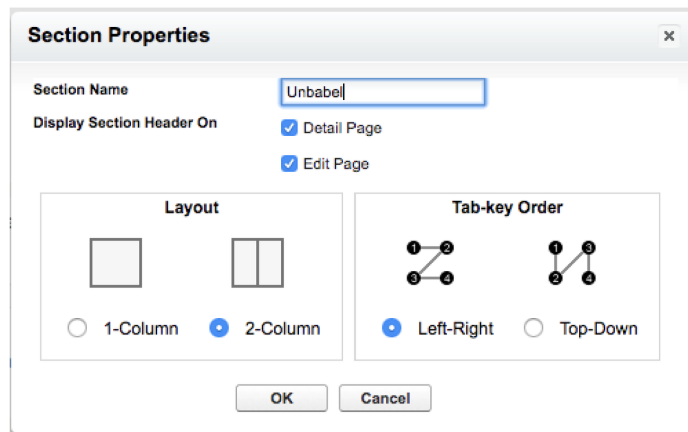
Clone Sharing

Close Case Submit for Approval

5. Create a section using drag and drop:



6. Name it **Unbabel** with the settings:



7. Add to the created section the following fields:

- **Unbabel Language**
- **Unbabel Translated Description**
- **Always Check Language**



8. Finally, add the **Email Translation** quick action to the Quick Actions, by using drag and drop again.

On Lightning

1. Make sure you select the **Case.Email_Translation_L** lightning action:

The screenshot shows the Salesforce Lightning interface. On the left, the 'Mobile & Lightning Actions' menu is highlighted. The main area displays a 'Quick Find' search for 'Mobile Action Name'. A table lists various actions, including 'Email Translation'. A tooltip for 'Email Translation' is visible, showing details: 'Label: Email Translation', 'Name: Case.Email_Translation_L', 'Action Type: Quick Action', and 'Create Feed Item: No'. Below the table, the 'Case Layout' section shows a 'Case Sample' and a 'Highlights Panel'. The 'Quick Actions in the Salesforce Classic Publisher' section is visible, and the 'Email Translation' action is being added to the 'Salesforce Mobile and Lightning Experience Actions' section, indicated by a red arrow and the number 4.

On Classic

Make sure you select the **Case.Email_Translation**:

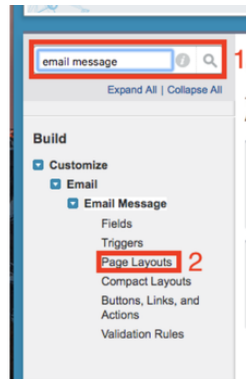
The screenshot shows the Salesforce Classic interface. On the left, the 'Quick Actions' menu is highlighted. The main area displays a 'Quick Find' search for 'Quick Action Name'. A table lists various actions, including 'Email Translation'. A red arrow points from the 'Email Translation' action in the table to the 'Email Translation' button in the 'Quick Actions in the Salesforce Classic Publisher' section, indicated by the number 4. The 'Case Sample' section shows a 'Highlights Panel' with details for a case, including 'Customer', 'Sample Contact', 'Sample Account', 'Case Number', 'Created Date', 'Status', 'Sample Status', 'Priority', 'Sample Priority', and 'Case Owner'.

9. Click the **Save** button. Repeat the process for the other feed based case page layout that you are using.

Email Message Page Layout

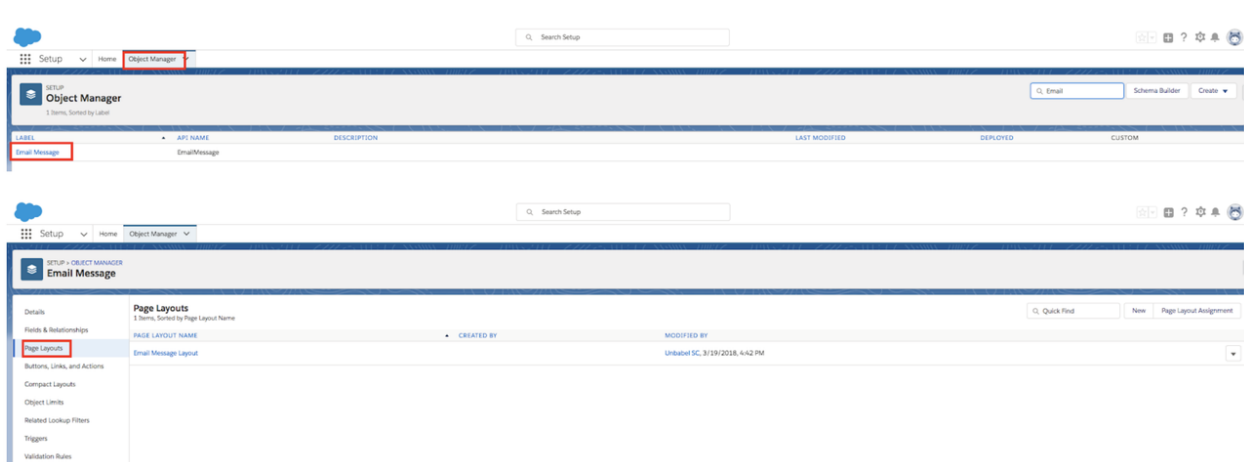
On Classic

1. Go to the **Quick Find** box type **email message** and then, click the **Page Layouts** link:



On Lightning

1. Go to the **Object Manager**, open **Email Message** and then choose **Page Layouts**.



Then on the **Page Layout** page:

1. Click on the **Edit** link next to the layout you will be modifying.

Email Message Page Layout

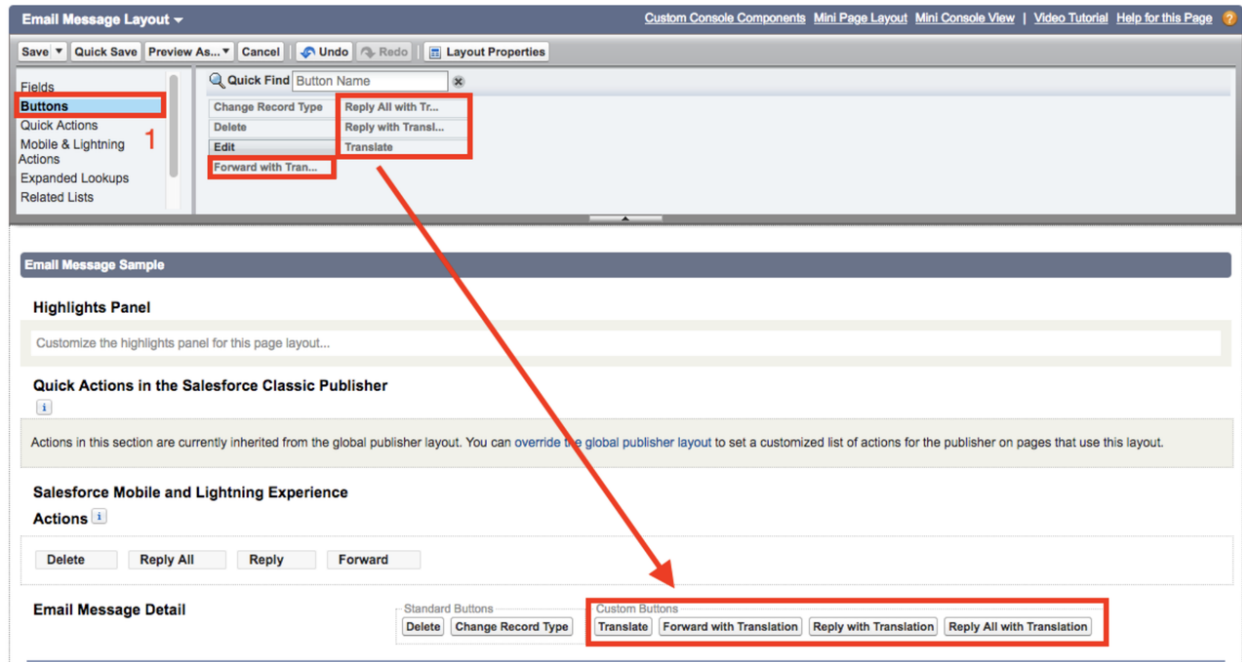
[Help for this Page](#)

This page allows you to create different page layouts to display Email Message data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Email Message Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Email Message Layout	salesforce.com, 01/03/2018 16:59	Salesforce Admin, 13/03/2018 11:21

2. Navigate to the **Buttons** option (1) and drag and drop to the specified section the following buttons:

- **Translate**
- **Forward with Translation**
- **Reply with Translation**
- **Reply All with Translation.**



3. Create a new section named **Unbabel** and add the Unbabel fields:

- **Unbabel Original Message Id**
- **Unbabel Original Message**
- **Unbabel Translated Message Id**
- **Unbabel Translated Message**
- **Unbabel Language**

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Quick Find Field Name

Section	Created By	From Name	Is Externally Via...	Message Date	Status	Translated HTML Body	Unbabel Original ...	Unbabel Translate...
Blank Space	Created Date	Has Attachment	Is Incoming	Message Size	Subject	Translated Subject	Unbabel Original ...	
BCC Address	From	Headers	Last Modified By	Parent Case	Text Body	Translated Text Body	Unbabel Temporary	
CC Address	From Address	HTML Body	Last Modified Date	Related To	To Address	Unbabel Language	Unbabel Translate...	

Email Message Detail

Standard Buttons: Delete, Change Record Type
Custom Buttons: Reply with Translation, Reply All with Translation, Forward with Translation, Translate

Information

Related To: Sample Contract
Message Date: 16/04/2018 19:31
Created By: Sample User
Status: Sample Status
Last Modified By: Sample User

Address Information

From Address: sarah.sample@company.com
From Name: Sample From Name
To Address: Sample To Address
CC Address: Sample CC Address
BCC Address: Sample BCC Address

Message Content

Subject: Sample Subject
HTML Body: Sample HTML Body
Text Body: Sample Text Body

Unbabel

Unbabel Original Message Id	Sample Unbabel Original Message Id	Unbabel Translated Message Id	Sample Unbabel Translated Message Id
Unbabel Original Message	Sample Unbabel Original Message	Unbabel Translated Message	Sample Unbabel Translated Message
Unbabel Language	Sample Unbabel Language		

4. Click **Save**.

Configure Languages

In order to configure the Languages you need to follow the steps below.

1. Go to the **Setup** → **Picklist Value Set**:

On Classic

value |

Expand All | Collapse All

Build

☒ **Create**
Picklist Value Sets

On Lightning

Setup

value set

Objects and Fields

Picklist Value Sets

2. Select Languages.

PICKLIST Value Sets

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

View: All Create New View

Global Value Sets		None	
Action	Label		Description
Edit Del Add	Language Sets		
Edit Del Add	Unlabelled Status		
Edit Del Add	Unlabelled Translation Type		
Deleted Global Value Sets (0)			

- Deactivate all the languages that you will not be using. Do not deactivate the agent language, most likely English:

Global Value Set (Managed)

[« Back to List](#)

 This Global Value Set is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Values [28] | Inactive Values [0] | Fields Wrt

Global Value Set Detail

Edit

▼ Information

Label	Languages
Name	Languages
Description	
Namespace Prefix	unbabelapi

Edit

Values

New Reorder Replace Printable View Chart Colors ▾

Action	Values	API Name
Edit Del Deactivate	ar:Arabic	ar:Arabic
Edit Del Deactivate	bg:Bulgarian	bg:Bulgarian
Edit Del Deactivate	da:Danish	da:Danish
Edit Del Deactivate	de:German	de:German
Edit Del Deactivate	el:Greek	el:Greek
Edit Del Deactivate	en:English	en:English
Edit Del Deactivate	es:Spanish	es:Spanish
Edit Del Deactivate	es-latam:Spanish(Latam)	es-latam:Spanish(Latam)
Edit Del Deactivate	fi:Finnish	fi:Finnish
Edit Del Deactivate	fr:French	fr:French
Edit Del Deactivate	hi:Hindi	hi:Hindi
Edit Del Deactivate	id:Indonesian	id:Indonesian
Edit Del Deactivate	it:Italian	it:Italian
Edit Del Deactivate	ja:Japanese	ja:Japanese
Edit Del Deactivate	ko:Korean	ko:Korean
Edit Del Deactivate	nl:Dutch	nl:Dutch
Edit Del Deactivate	no:Norwegian	no:Norwegian
Edit Del Deactivate	pl:Polish	pl:Polish
Edit Del Deactivate	pt:Portuguese	pt:Portuguese
Edit Del Deactivate	pt-br:Portuguese(BR)	pt-br:Portuguese(BR)
Edit Del Deactivate	ro:Romanian	ro:Romanian
Edit Del Deactivate	ru:Russian	ru:Russian
Edit Del Deactivate	sv:Swedish	sv:Swedish
Edit Del Deactivate	th:Thai	th:Thai
Edit Del Deactivate	tr:Turkish	tr:Turkish
Edit Del Deactivate	vi:Vietnamese	vi:Vietnamese
Edit Del Deactivate	zh-CN:Chinese (simplified)	zh-CN:Chinese (simplified)
Edit Del Deactivate	zh-TW:Chinese (Traditional)	zh-TW:Chinese (Traditional)

Add Languages on Case Record Types

1. Please add the **Active** Languages to all the **Case Record Types** that you are using:

The screenshot shows the Salesforce Setup page for Case Record Types. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, **Record Types** (highlighted with a red box), Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Hierarchy Columns, Triggers, and Validation Rules. The main content area is titled 'Record Types' and shows a table with 2 items, sorted by Record Type Label. The table has columns for RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. The data rows are 'Unbabel 1' and 'Unbabel 2', both with a checkmark in the ACTIVE column and a modified date of 10/17/2019, 3:43 PM by Unbabel Translations.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Unbabel 1		✓	Unbabel Translations, 10/17/2019, 3:43 PM
Unbabel 2		✓	Unbabel Translations, 10/17/2019, 3:43 PM

2. Select the Unbabel Language field:

The screenshot shows the Salesforce Setup page for the 'Unbabel 1' Record Type. The page title is 'Record Type Unbabel 1'. Below the title, there is a description: 'Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.' The main content area shows the record type details, including the Record Type Label 'Unbabel 1', Support Process 'Unbabel_1', Record Type Name 'Unbabel_1', Namespace Prefix 'unbabel__', Description, Created By 'Unbabel Translations', and Modified By 'Unbabel Translations'. Below the details, there is a 'Picklists Available for Editing' section with a table of picklist values. The table has columns for Action, Field, and Modified Date. The data rows are 'Case Origin', 'Case Reason', 'Priority', 'Type', and 'Unbabel Language' (highlighted with a red box). The modified date for all rows is 10/10/2019 15:43.

Action	Field	Modified Date
Edit	Case Origin	10/10/2019 15:43
Edit	Case Reason	10/10/2019 15:43
Edit	Priority	10/10/2019 15:43
Edit	Type	10/10/2019 15:43
Edit	Unbabel Language	10/10/2019 15:43

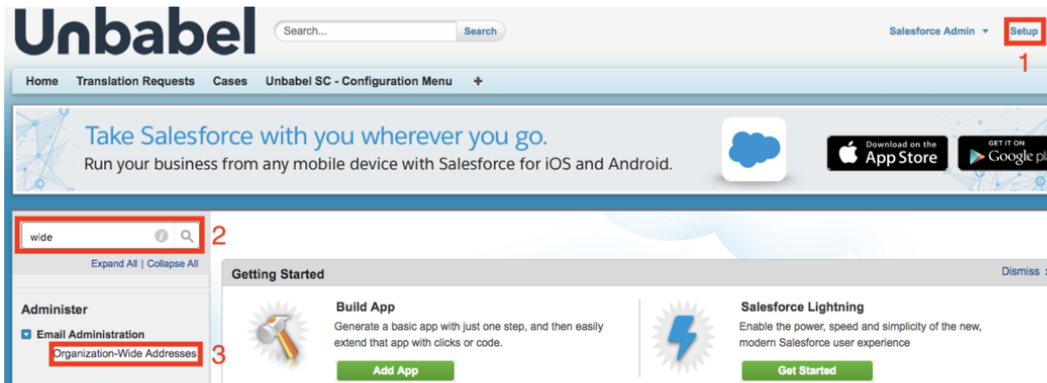
3. Add all the languages that you will be using and click **Save**.

Set up a Organization-Wide Address

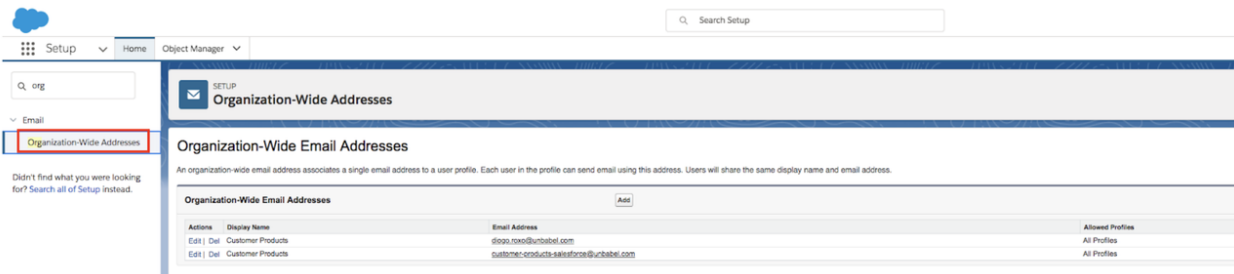
If you do not have an Organization-Wide Address you will need to set one up. Otherwise, you can skip this section.

1. Navigate to the **Organization-Wide Address** page.

On Classic:



On Lightning:



2. Click the **Add** button.

Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Organization-Wide Email Addresses **Add**

3. Fill in the fields that suit your organization and click **Save**.

Edit Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

Save
Save and New
Cancel

Organization-Wide Email Address
I = Required Information

Display Name

Email Address

☐ Allow All Profiles to Use this From Address
☒ Allow Only Selected Profiles to Use the From Address

Profiles

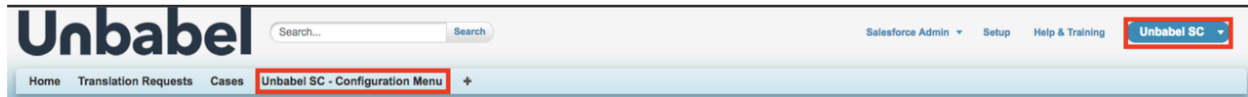
System Administrator
Standard User
Read Only
Solution Manager
Marketing User
Contract Manager
High Volume Customer Portal User
Customer Community User
Customer Community Plus User
Partner Community User

Save
Save and New
Cancel

Configure Service Cloud Flow

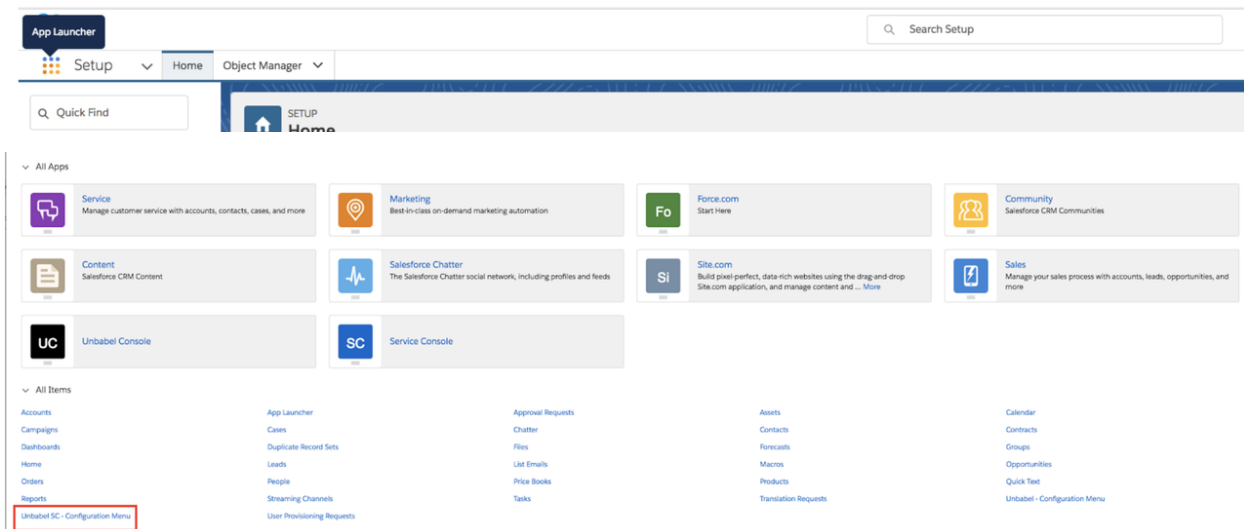
On Classic

1. Navigate to the **Unbabel SC - Configuration Menu** under the **Unbabel SC App**.



On Lightning

1. Go to the App Launcher, open the **Unbabel SC - Configuration Menu**.



2. Select the options that best suit your company. Make sure **Unbabel Organization Wide Email Addresses** has an email selected. Click **Save** and a success message should appear.



Service Cloud Configurations

**Unbabel**

Unbabel - SC Configurations Menu

Translation Configuration

Automatic translations (emails) ☒Always check language (Outbound Emails) ☐Automatic translation (Cases) ☐Create task for outbound email ☐

Excluded domains

Translation Configuration

- **Automatic Translations (Emails)** → Translate automatically inbound emails when they enter the system.
- **Automatic Translations (Cases)** → Translate automatically newly created Cases (Description) when they enter the system.
- **Excluded Domains** → Inbound Email Messages sent from these specific email addresses domains won't be translated.
- **Always check language (Outbound Emails)** → Always check language for Outbound Emails. Useful when several agents work on the same case
- **Create Task for outbound email** → Check this option if you want a task to be created each time a new email is sent to the client.

Case Feed Configuration

System User as default case owner ☐ThreadId in Subject ☐From name as integration user ☒ThreadId in Body ☒Activate Queues ☐Queue Language

Case-Feed Configuration

- **System User as default case owner** → Check this option if you are using the system automated case user for Web/Email-to-Case. You can check your current setup under *Setup* → *Support Settings*:

- **From name as the integration user** → The translated inbound emails will show up on the case feed as being created by the Unbabel integration user.
- **Activate Queues** → Opens the queue view in order to restrict the Automatic Translation on a per queue basis. Only use this if you want to use Unbabel only for some queues.
 - Select the queues to be used.
- **ThreadId in Subject** → Case thread Id will be added to the email subject.
- **ThreadId in Body** → Case thread Id will be added to the email body.
- **Queue Language** → The default language associated with all queues.

Email Translation Action Configuration

- **From Address Visible** → Displays/Hides the "From" Address on the Email Translation quick action.
- **Enable Quick Text** → Enables the Quick Text functionality on the Email Translation quick action.
- **Remove email thread** → Removes the email thread from the previous emails on the Email Translation quick action.
- **Default email template (Id)** → Default template Id to use on the Email Translation Quick Action.
- **Organization Wide Email Addresses** → Email addresses to use in the "From" when sending an email through the Email Translation Quick Action.

Now you should have all the configurations set. You can start using the application.

FAQs and Common Issues

By following all the previous steps in this installation guide, you are able to use the application to its fullest. However make sure that your Agents are able to distinguish between the standard flow and the Unbabel Translation flow.

Email Buttons below Single Email Messages in Case Feed

When you see yourself in the case feed layout, the buttons to reply, reply all, forward, etc stand for standard Salesforce actions, and therefore, the email translation that you send through them **will not present the Unbabel translation to the customer**.

The screenshot displays the Unbabel user interface. At the top, there is a search bar and a navigation menu with options: Home, Translation Requests, Cases, and Unbabel SC - Configuration Menu. The 'Cases' tab is selected. Below the navigation bar, the case details for 'teste do campo de assunto' are shown, including the case number 00001032, creation date 02/05/2018 16:01, status 'New', priority 'Medium', and case owner 'Bernardo Gomes'. The left sidebar contains 'FEED FILTERS' with options: All Updates, All Emails, Call Logs, Case Notes, Status Changes, and Tasks and Events. The main feed area shows 'All Updates for this case' with a search bar and a 'Sort By Latest Posts' dropdown. Two email messages are listed in the feed, each from 'Bernardo Gomes'. The first message has a subject 'teste do campo de assunto' and a body 'meu corpo de email'. The second message has a subject 'teste do campo de assunto' and a body 'my email body'. In both messages, the 'Reply' and 'Reply All' buttons are highlighted with red boxes. Additionally, the 'Email' button in the top navigation bar is highlighted with a red box.

In case you feel this might confuse your agents, please follow the steps below to remove these standard actions:

1. Go to **Setup** and search for the **Case** object in the Quick Find box. Select **Page Layouts** and edit the layout that you are using as default for **Feed Based**.

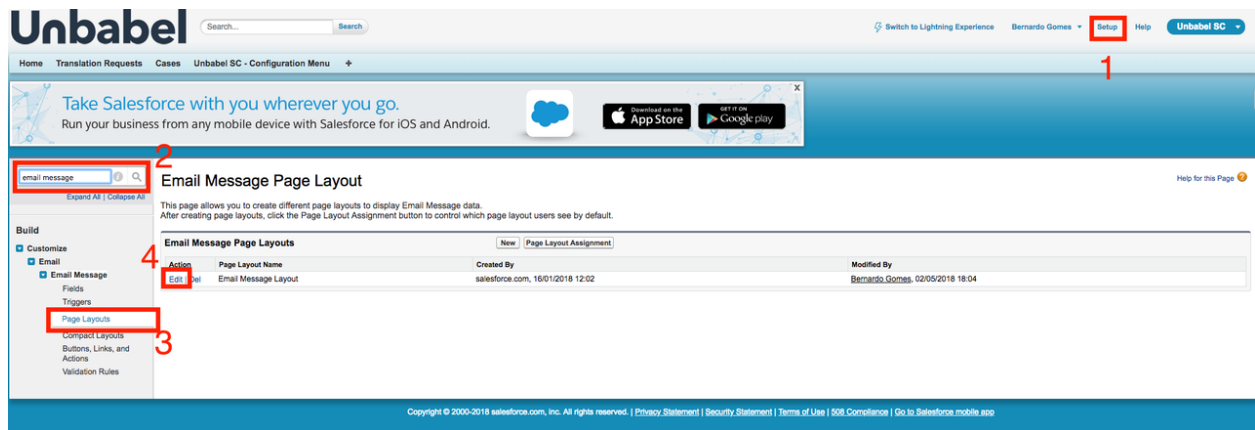
The screenshot shows the Unbabel Setup page. In the top navigation bar, the 'Setup' link is highlighted with a red box and labeled '1'. Below the navigation bar, there is a search bar with 'case' entered, highlighted with a red box and labeled '2'. On the left sidebar, the 'Page Layouts' link is highlighted with a red box and labeled '3'. The main content area shows the 'Case Page Layouts' table. The table has columns for Action, Page Layout Name, Created By, Modified By, and Feed-Based Layout. The 'Case Feed Based' layout is highlighted with a red box and labeled '4', and its 'Feed-Based Layout' checkbox is checked with a red box.

Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Case (Marketing) Layout	Bernardo Gomes, 16/01/2018 12:02	Bernardo Gomes, 02/05/2018 12:35	<input type="checkbox"/>
Edit Del	Case (Sales) Layout	Bernardo Gomes, 16/01/2018 12:02	Bernardo Gomes, 02/05/2018 12:36	<input type="checkbox"/>
Edit Del	Case (Support) Layout	Bernardo Gomes, 16/01/2018 12:02	Bernardo Gomes, 02/05/2018 14:42	<input type="checkbox"/>
Edit Del	Case Feed Based	Bernardo Gomes, 02/05/2018 14:52	Bernardo Gomes, 02/05/2018 16:18	<input checked="" type="checkbox"/>
Edit Del	Case Layout	Bernardo Gomes, 16/01/2018 12:02	Bernardo Gomes, 02/05/2018 14:50	<input type="checkbox"/>

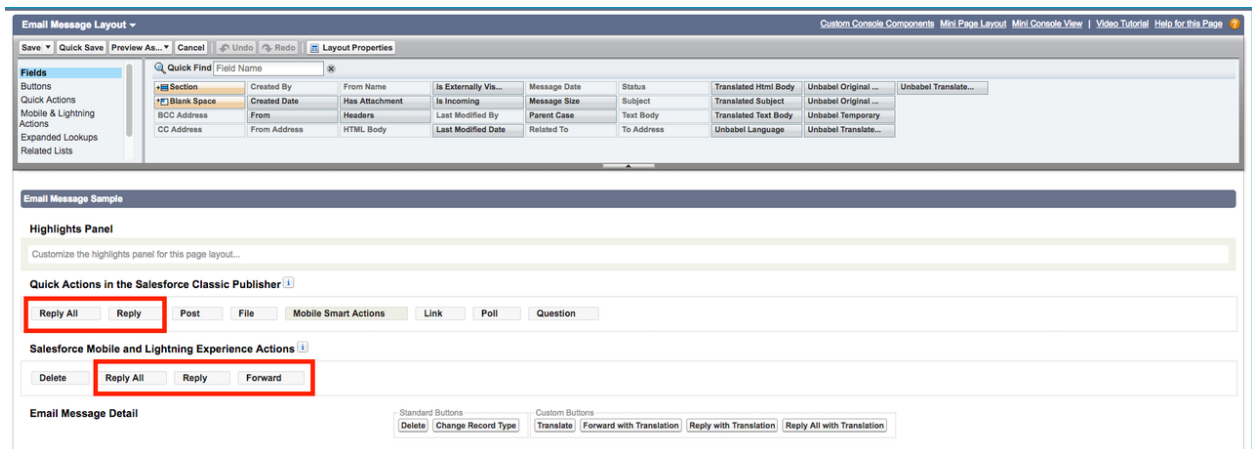
2. Remove all the **Email** actions from the layout.

The screenshot shows the 'Case Feed Based' layout editor. The 'Quick Find' box at the top left contains 'Email'. In the 'Fields' section, the 'Email' field is highlighted with a red box. In the 'Quick Actions in the Salesforce Classic Publisher' section, the 'Email' button is highlighted with a red box. In the 'Salesforce Mobile and Lightning Experience Actions' section, the 'Email' button is highlighted with a red box. The 'Case Detail' section shows the 'Email' button highlighted with a red box. The 'Case Information' section shows the 'Email' button highlighted with a red box.

3. In the **Setup** page, search now for the **Email Message** object, select **Page Layouts** and edit the one that you are currently using.



4. Remove all the standard Salesforce actions.



Your cases now only have the **View Email** option and your agents will always reply to emails using the Unbabel translation flow.

Cases Unbabel SC - Configuration Menu +

Case Number 00001026 Created Date 18/01/2018 09:32

um caso
aquele caso que deve ser utilizado para ser traduzido.


Status New
Priority Medium
Case Owner [Bernardo Gomes](#)


Feed Details

Log a Call ⚡ Email Translation 🗨 Post

Click here to expand the Log a Call action.

All Updates for this case
🔍 | Sort By Latest Posts ▾

 Bernardo Gomes sent an email.

 To: salesforce-dev-team+devbernardo@unbabel.com Subject: um caso
aquele caso que deve ser utilizado para ser traduzido.
[Show Less](#)
[View Email](#)

[Comment](#) · [Like](#) · 18 January 2018 at 09:32

[+ Follow](#)

Followers
No followers.

Custom Links
[Up-sell / Cross-sell Opportunity](#)

Translate Case ▾

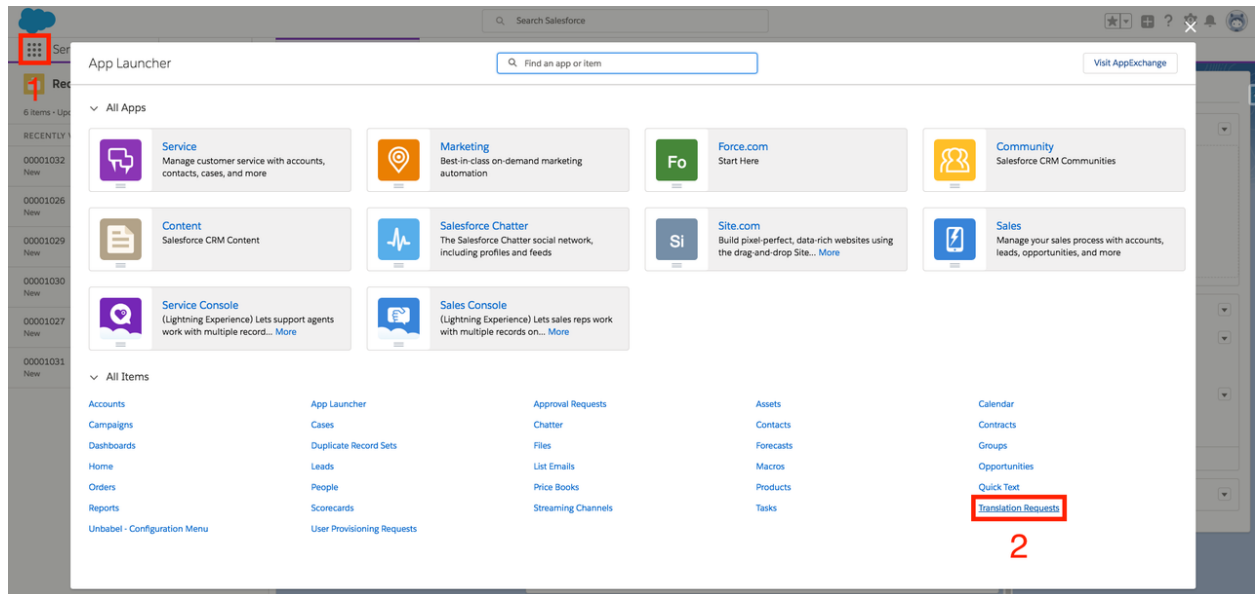
Email Translation was not delivered to the customer

In case of email delivery failure the system administrator should be contacted. Although this behaviour is rare, the root cause is available at the Translation Request custom object that refers to the request for the email.

Unbabel Search... Search

[Switch to Lightning Experience](#) [Bernardo Gomes](#) Setup Help **Unbabel SC**

[Home](#) **Translation Requests** [Cases](#) +




A possible cause of email delivery failure is the fact that your organisation has reached the limit of the number of email messages to send via API calls. The following message should be displayed in the Translation Request:

▼ Log
Error Log Unexpected error: SendEmail failed. First exception on row 0; first error: SINGLE_EMAIL_LIMIT_EXCEEDED, Email limit exceeded: []

As an Organization wide limit, Production orgs have a limit of **5000 apex emails**. However, if you are using a trial org, the limit is set to 15 instead of the default value. [source: https://help.salesforce.com/articleView?id=000002490&language=en_US&type=1]

To check your limit go to <https://workbench.developerforce.com/login.php>, and follow the steps:

1. Accept the conditions of the service and log in with the credentials from the org you want to check the limit.

workbench 

Environment: Production

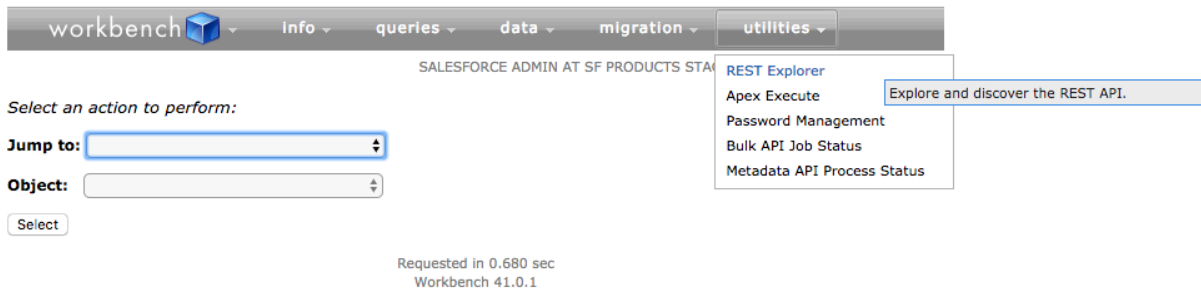
API Version: 41.0

☒ I agree to the terms of service

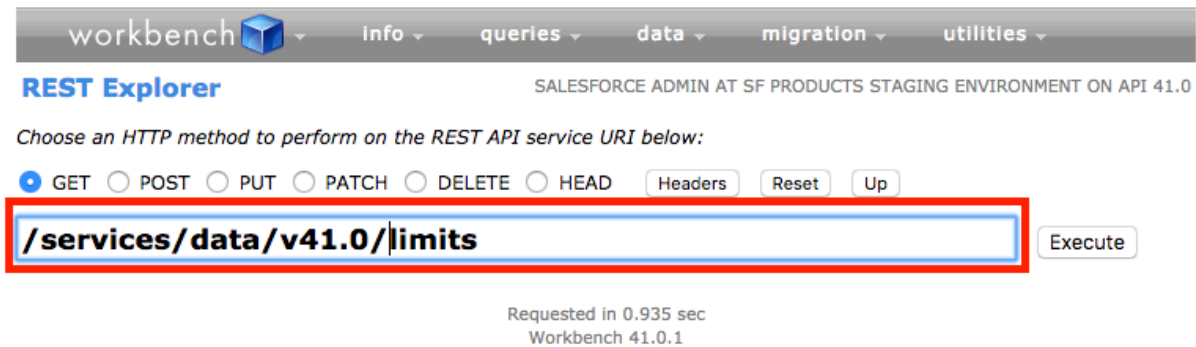
Login with Salesforce

Workbench 41.0.1

2. Navigate to the **Utilities** and click on the **REST Explorer** option.



3. Fill in the execute command with the following command, referring to your version and add **/limits**. Click the **Execute** button.



4. You will be able to check the limits, including the **Single Email limits**. (The example below refers to a trial org).

workbench

Info

queries

data

migration

utilities

REST Explorer

SALESFORCE ADMIN AT SF PRODUCTS STAGING ENVIRONMENT ON API 41.0

Choose an HTTP method to perform on the REST API service URI below:

☒ GET

☐ POST

☐ PUT

☐ PATCH

☐ DELETE

☐ HEAD

Headers

Reset

Up

/services/data/v41.0/limits

Execute

Expand All

Collapse All

Show Raw Response

ConcurrentAsyncGetReportInstances

ConcurrentSyncReportRuns

DailyApiRequests

DailyAsyncApexExecutions

DailyBulkApiRequests

DailyDurableGenericStreamingApiEvents

DailyDurableStreamingApiEvents

DailyGenericStreamingApiEvents

DailyStreamingApiEvents

DailyWorkflowEmails

DataStorageMB

DurableStreamingApiConcurrentClients

FileStorageMB

HourlyAsyncReportRuns

HourlyDashboardRefreshes

HourlyDashboardResults

HourlyDashboardStatuses

HourlyODataCallout

HourlySyncReportRuns

HourlyTimeBasedWorkflow

MassEmail

PermissionSets

SingleEmail

Max: 15

Remaining: 14

StreamingApiConcurrentClients

Requested in 0.979 sec

Workbench 41.0.1

Source and Target Language are the same

A different request error in Translation Requests might occur if the Translation is asked between the same languages (e.g. English → English). For these cases, although the translation was not performed, the email is sent. However, it is sent through an API call, therefore counting for the Salesforce limits.