

Enabling Salesforce CRM Content

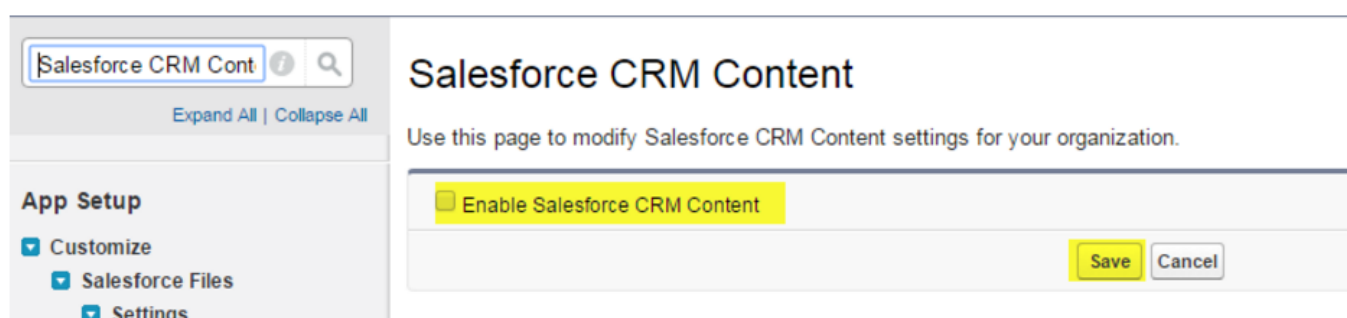
If you would like to process file from Salesforce Libraries, please enable Salesforce CRM Content. This will allow you to get access to Salesforce Libraries. Salesforce CRM Content is only available in Salesforce Classic, but files from content libraries are available in Lightning Experience if Salesforce CRM Content is enabled for your org then you can send files from content libraries with email as an attachment, using Ortoo e2a (Email-to-anything).

Sending Files/Libraries Files as Attachments in an Email

Ortoo e2a allow you to send Files as attachments with email, and you can send Libraries files as well. If you would like to send any file with email as an attachment. You need to enable Salesforce CRM Content and its license for the user.

To enable Salesforce CRM Content setting:

1. Go to Setup | Customize | Settings | Salesforce CRM Content
2. Then checked Salesforce CRM Content and Save



To enable Salesforce CRM Content user license:

1. Go to Setup | Manage Users| Users
2. Edit your User and mark the checkbox of Salesforce CRM Content User and Save


Storing Incoming Email Attachments as Files

Ortoo e2a enables you to store incoming email attachments in Files by enabling Chatter and Feed Tracking for the object as described in steps below.

To enable chatter settings:

1. Go to Setup | Customize | Chatter Settings
2. Than Edit and enable Chatter Settings

Chatter Settings

Help for this Page 

Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.

Edit
<div>Chatter Settings = Required Information</div> <p>Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. Learn More...</p> <p>Enable <input type="checkbox"/></p>
Edit

To enable feed tracking on object:

1. Go to Setup | Customize | Feed Tracking
2. Than look for object you would like to enable feed tracking, for example If you are using "Central Email Storage Object" checked in "e2a Email Service Rule" then look for "e2a Email" from Object list and checked Enable Feed Tracking and Save, Enable Feed tracking for objects you wish to attach file to, please see the examples below for details.

Example 1:

In "e2a Email Rule", if you are using a Standard Target Object "Lead" and "Use Central Email Storage Object" is checked, then enabled Feed Tracking for "Lead" and "e2a Email" objects.

Example 2:

In "e2a Email Rule", if you are using Custom Target Object "Request" and Custom Email Storage child object "Request Email", then enable Feed Tacking for "Request" and "Request Email" objects.










Following screenshots show, enabling feed tracking on e2a Unmatched email and setting for storing incoming email attachments in files.

Screenshot 1: Enable feed tracking on e2a Unmatched Email object

Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.

<div>e2a Distribution List</div> <div>e2a Email 0 Fields</div> <div>e2a Email Service</div> <div>e2a Global Settings</div> <div style="background-color: yellow;">e2a Unmatched Email 0 Fields</div> <div>e2a User Settings</div>	<div>Fields in accounts</div> <div> Save Cancel <input checked="" type="checkbox"/> Enable Feed Tracking </div> <p>You can select up to 20 fields.</p> <div>Account Name <input type="checkbox"/></div> <div>Account Owner <input type="checkbox"/></div>
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Screenshot 2: Select Files and Save to store incoming email attachments in in files

Incoming Email Configuration	
Insert Thread Id in Email Subject  	Insert Thread Id in Email Body  
Store Email Attachments on Target Object  	Store Email Attachments on Email Storage Object  
<div>Store Attachments In </div> <div> <div>Files</div> <div>Attachment Object</div> <div style="background-color: green;">Files</div> </div>	
Alternate Thread Id	

Please contact us at support@ortooapps.com for any questions.