

e2a Quick Start Guide

Introduction

Email-to-anything app (also called e2a) provides the ability to rapidly setup Email Services within your Salesforce organization without the need to develop, test and deploy Apex code. It also provides an enhanced email client, which can be used instead of the built in Salesforce email client. This adds many new features, such as email drafts, distribution lists, etc.

Email services setup within e2a can provide functionality very similar to that of Salesforce's Email-to-Case but for any object, including custom objects, and with more advanced features. Functionality includes:

- Create a new record in a specified object when an email is received via an email service. Populate this new record with data extracted from the email.
- Email history (related list) for objects other than Case, including custom objects
- Send, reply to or forward an email from any object in Salesforce, with an advanced email editor that includes features such as saving draft emails, auto-save, distribution lists, importance flag, and auto-complete of email addresses as you type
- Add an email to an existing record in a specified object when an email containing a matching thread id, or a reply to an attached email, is received via an email service. A reply email is recognized by an email header which is matched against Message-ID header of each existing email record.
- Update an existing record when a new matching email arrives, using data extracted from the email to update specific fields in the target object
- Unmatched Email Queue(s) holds emails received but not successfully added to a new or existing record – for manual processing later

It is recommended that the setup and configuration of email services within this application should be done by a Salesforce administrator or at least by someone who has a reasonable understanding and knowledge of Salesforce administration. The Ortoo support team is always happy to help you with the configuration process.

Support

If you experience any problems getting started or using e2a (Email-to-anything), please contact our support team - support@ortooapps.com and we will be happy to help.

Getting Started - [click here to get started!](#)