

Getting Started

Getting e2a up and running

To get e2a “up and running” quickly, you will need to complete the following steps:

1. **[Install e2a](#)** - from the AppExchange (or link provided by Ortoo). If you installed in a sandbox you must also set Deliverability of emails as described [here](#)
2. **[Decide on the Target Object](#)** - this is where your new records will be created and/or email attached to and sent from (e.g. for Email-to-Case the target object is Case). It could be a standard object, such as Lead, or could be a custom object
3. **[Configure the Email Storage Object](#)** - this step is only needed if you are using a custom object. e2a comes preconfigured for Lead, Account, Case, Contact, Contract and Opportunity
4. **[Configure your Target Object](#)** - to view your emails from your target object, add and configure a related list. If you are using custom target object, then add a Thread Id field
5. **[Create a queue for unmatched emails](#)** - this is a queue where any incoming emails are put if they don't match or create a record in the Target Object. Users can view the queue and decide what to do with each email
6. **[Set up an Email Service](#)** - this defines the email address Salesforce uses to accept incoming email
7. **[Set up an Email Rule](#)** - this tells e2a how to process your emails that are received. You can create a new record, update an existing record (attach to an existing record), or drop an email altogether as well
8. **[Assign Licenses and Access Permissions for Users](#)** - this is needed to allow users to access e2a and emails
9. **[Redirect your external email address to Salesforce](#)** - this can be left until after you have configured and tested your settings as above. Only needed if you want to use an external email address such as [sales@yourcompany.com](#) with e2a
10. **[Set up any Org Wide Email Address wanted](#)** - this is an optional step. If you want users to be able to send emails out with a “From” address other than their own, you will need to set up a Salesforce Org Wide Email Address (OWEA) for each address wanted

Click on the links above to see further details about each step. If you would like any help with the setup, please contact our support team at support@ortooapps.com and we will be happy to help.

Taking it further...

Once you have done the main setup above, you may want to configure other areas of e2a, depending on your use case.

Click on the links below to see help on the following subjects:

- [Regex Builder Tool](#) - this tool helps build regular expressions for extracting data from incoming emails for mapping to specific fields in the Target Object
- [e2a Unmatched Emails](#) - emails get put in this queue if they don't match a record in the Target Object, or e2a encounters a problem while processing the email
- [e2a User Settings](#) - this is where each user can set their e2a preferences
- [e2a Global Settings](#) - this is where company-wide e2a preferences can be set
- [Distribution Lists](#) - these can be set up to use when sending emails out Salesforce
- [e2a Business Units](#) - you can set e2a preferences per Business Unit (department)
- [e2a Email Client](#) - sending emails from Salesforce using e2a email client gives a much enhanced user experience compared to the default Salesforce email client
- [e2a Draft Emails](#) - save and retrieve draft emails using the e2a email client
- [Permission Sets](#) - easily assign users to 3 built in levels of e2a access
- [Configuring the Email Gateway option](#) - send emails out via Mailgun, bypassing various limitations of Salesforce's own email sending gateway
- [Using Email Templates with e2a](#) - how to set up and use email templates with e2a

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