

How to assign e2a Licenses and Permission Sets to Users?

Assign e2a License to Users

Once the application has been installed you have to assign e2a license to the users who will use the application.

1. Go to **Setup | Installed Packages**
2. Then find Ortoo **Email-to-anything** and click on "**Manage Licenses**"
3. It will open a list of users that are already assigned the e2a license in your Org. If you want to add some new user not listing here then proceed further
4. Click on **Add Users**
5. It will show you a list of all the users that are created in the Org but not yet assigned e2a license
6. **Choose/Check** the username that you want to give access to e2a
7. Click **Add** at the end
8. The new user will be added to e2a licensed users

Once you are done with assigning the Licenses, you need to assign your Users appropriate permissions to access e2a tabs and emails. Please see the following steps to understand how to assign e2a Permissions Sets and details of the level of access in each Permission Set.

Assign e2a Permission Sets to Users

e2a provides permission sets so that appropriate levels of access to e2a features can easily be provided to users.

To assign these permissions to users:

1. Go to **Setup | Administration Setup | Manage users |Users** (or type Users in the quick search, and choose the one under Manage users heading)
2. Select the user you want to set the permission for
3. On the User detail page, there is a section 'Permission set Assignment'. Click on **Edit Assignments** as shown in the figure below:



There are three types of permission sets in e2a, you can select any of them as per your requirements.

e2a Email User

This will give a user permission to use e2a email client (send, read, reply, etc.) and to view and change their own email settings and any other personal settings for e2a. Users with this permission set have no access to view or edit e2a email rules, Global Settings, e2a Distribution Lists, and e2a Business Units. This user can see the following tabs:

- Home
- e2a Unmatched emails
- e2a User settings
- e2a About

	e2a Global Settings	e2a Email Rules	e2a Unmatched Emails	E2a User Settings	E2a Distribution Lists	E2a Business Units	E2a Emails
E2a Email User	No Access	No Access	R, C, E, D, V, M	R, C, E, D, V, M	No Access	No Access	R, C, V

e2a Email Manager

This Permission set will give access to everything that e2a Email User permission set gives, but also allow to access e2a Global settings, e2a Distribution Lists, and e2a Business Units. This user is not allowed to access/edit the e2a email rules.

This user can see the following tabs:

- Home
- e2a Global Settings
- e2a Unmatched Emails
- e2a User settings
- e2a Business Units
- e2a Distribution Lists
- e2a About

	e2a Global Settings	e2a Email Rules	e2a Unmatched Emails	E2a User Settings	E2a Distribution Lists	E2a Business Units	E2a Emails
E2a Email Manager	R, C, E, D, V, M	No access	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M

e2a Administrator

User with this Permission set has full access to every aspect of e2a.

This user can see the following tabs:

- Home
- e2a Global Settings
- e2a Unmatched Emails
- e2a Email Rules
- e2a User settings
- e2a Business Units
- e2a Distribution Lists
- e2a About

	e2a Global Settings	e2a Email Rules	e2a Unmatched Emails	E2a User Settings	E2a Distribution Lists	E2a Business Units	E2a Emails
E2a Administrator	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M	R, C, E, D, V, M

e2a Community User

This permission set is specially designed for community users to give similar access to 'e2a Email User' but for community users.

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