

e2a Architecture and Security

Overview

Ortoo e2a is an "app" that runs in on the Salesforce platform to extend the functionality of Salesforce. It consists of a package of code (i.e. logic) and data storage structures, both of which reside 100% within the Salesforce platform instance as a Managed Package. E2a can access data within the Salesforce platform instance but does not access any networks or data outside of the Salesforce platform instance. It runs in a defined user context within Salesforce. User access to the e2a application and data structures is controlled by the built-in access control features of Salesforce, including Profiles and Permission Sets, as well as e2a user licensing. E2a comes with 3 built-in Permission Sets (User, Manager, and Administrator) which can be assigned to Salesforce Users to give them an appropriate level of access to e2a functionality and data. Additional Permission Sets can be defined if required.

The functionality of e2a consists of two main areas:

1. Processing and storing incoming email data - emails sent/forwarded/redirected into Salesforce can be processed according to sets of configurable rules to create new records within Salesforce, update existing records in Salesforce, and store the email data against matched records in Related Lists. Sophisticated mapping rules can be defined to determine what data to extract from the emails and where to store it.
2. Allowing emails to be composed and sent by users from within the Salesforce user interface, and storing the sent emails within Salesforce against the appropriate object and record.

In combination, the above two areas of functionality allow two-way email trails/conversations to be captured and stored in Salesforce against the appropriate record and displayed in a Related List against that record. An appropriate record can be created by e2a if it doesn't already exist.

What Ortoo can see and do with a customer's Salesforce org

When e2a has been installed in a Salesforce org, Ortoo has access to the following only:

- e2a licenses - Ortoo can Add/removed licenses, turn on and off-licenses, change license type, and can see how many licenses have been used out of the ones assigned to a customer
- e2a version number - Ortoo can see what version of the Ortoo software is being used by a customer
- e2a patches and upgrades - Ortoo can push patches and upgrades of the Ortoo apps through to customer SFDC orgs
- The above facilities are provided by the Salesforce platform framework only. Ortoo does not have any direct access to the customer Salesforce org
- Ortoo does not have any other access to customer Salesforce orgs and so can't see any customer data unless temporary access is explicitly granted by a customer to Ortoo, e.g. to allow the Ortoo support

team to look at an issue

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