



EMAIL TO LEAD GENERATION

KIZZY CONSULTING



INSTALLATION/USER GUIDE



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KIZZY CONSULTING



About Kizzy Consulting

With a large number of successful projects in 4 different continents, **Kizzy Consulting** is one of the fastest growing Salesforce Partner firms. Over the years, Kizzy Consulting has helped the customers in setting up and expanding their businesses using Salesforce. We aim to provide best Salesforce solutions for your business needs.

We have a young nonetheless experienced team of Salesforce Certified Consultants, Developers and Administrators who have vast experience in several clouds in the Salesforce domain. Being a young team, growth and learning is in our DNA. Some of the fundamental business values our team believes in and works by are:

- Accountability for our actions.
- Trust in the client and gaining trust of the client.
- Commitment and on-time delivery.
- Mutual Understanding and Respect.

Looking forward to working with and for you! Until then, Adios mi Amigo!

Version History

Version	Date	Author	Change(s)	Sections Affected
<i>1.0</i>	<i>Jan 02, '24</i>	Suryansh Sharma	None	None

Table of Contents

Installation/User Guide 	3
<i>1. INTRODUCTION</i>	<i>5</i>
<i>INSTALLATION</i>	<i>5</i>

1. Introduction

Welcome to the User Guide for Email To Lead Package by Kizzy Consulting! This comprehensive guide is designed to assist you in navigating and optimising your experience with our innovative Email to Lead mapping Service.

Thank you for choosing the Email To Lead Package by Kizzy Consulting. Let's embark on a journey of enhanced productivity and efficiency together!

Installation

1. Install the package [hyperlinking remaining] from the official Salesforce AppExchange site. You can find us developing new and exciting solutions [here](#).
2. Once installed, go to Setup, from Quick Find Box; open the Email Services and open the **EmailServices** record.
3. Copy the mail from the **KizzyEmailServicesToLead** email address record.

Search: email services

▼ Email

Send through External **Email Services**

▼ Custom Code

Email Services

Didn't find what you're looking for?
Try using Global Search.

SETUP Email Services

Email Services

Email services are automated processes that use Apex classes to process the contents, headers, and attachments of inbound e based on contact information in messages. Each email service has one or more email service addresses that can receive messi

Before creating email services, create Apex classes that implement the Messaging.InboundEmailHandler interface.

```
public with sharing class myHandler implements Messaging.InboundEmailHandler {
    public Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email,
        Messaging.InboundEmailResult result = new Messaging.InboundEmailresult());
    return result;
}
```

View: **All** Create New View

New Email Service

Action	Active	Email Service Name ↑	Apex Class
Edit	✓	EmailServices	EmailServiceHandler

(1.1)

Email Service: EmailServices

[Edit](#)
[Activate](#)
[Deactivate](#)
[Delete](#)
[Cancel](#)

Email Service Name	EmailServices
Apex Class	EmailServiceHandler
Accept Attachments	All
Advanced Email Security Settings	☐ i
Accept Email From	All email addresses (subject to security settings)
Convert Text Attachments to Binary Attachments	☐ i
Active	☒

▼ Failure Response Settings

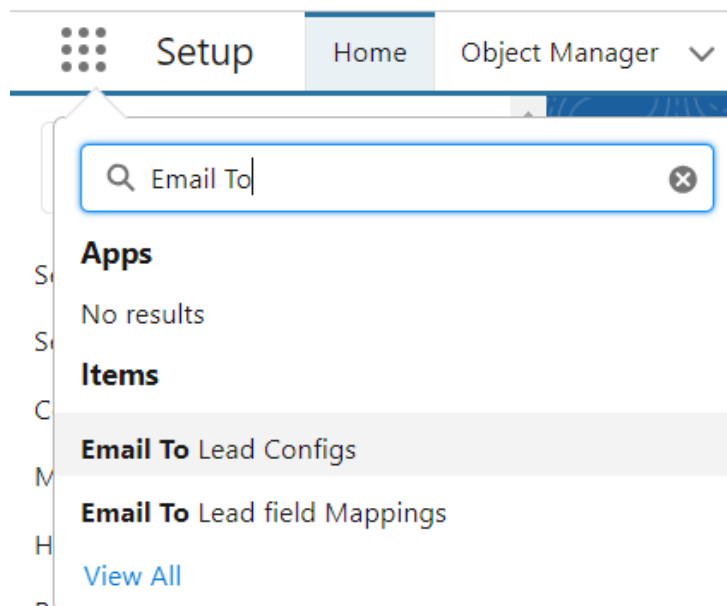
Over email rate limit action	Discard message
Deactivated Email Address Action	Discard message
Deactivated Email Service Action	Discard message
Unauthenticated sender action	Discard message
Unauthorized sender action	Discard message
Enable Error Routing	☐ i

Email Addresses [New Email Address](#)

Action	Email Address Name	Email Address
View Edit	KizzyEmailServicesToLead	emailservices@*****

(1.2)

- Now, click on AppLauncher and type “Email To Lead Config.”
- Create a new “Email To Lead Config” record and add the recently copied Email address from Email Services [Point 3]. ***This is a mandatory step and the services won’t work unless this step is completed.***



(1.3)

New Email To Lead Config

Information

EmailToLead Config

Owner
Pushkar Dahal

To Email

Add Attachment

Cancel Save & New Save

(1.4)

Email To Lead Config
E-001

Related Details

EmailToLead Config
E-001

Owner
Pushkar Dahal

To Email

Add Attachment
☒

Created By
Pushkar Dahal

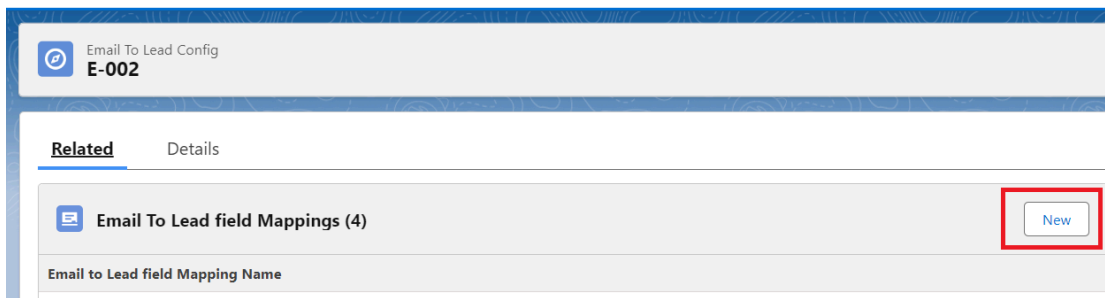
Last Modified By
Pushkar Dahal

(1.5)

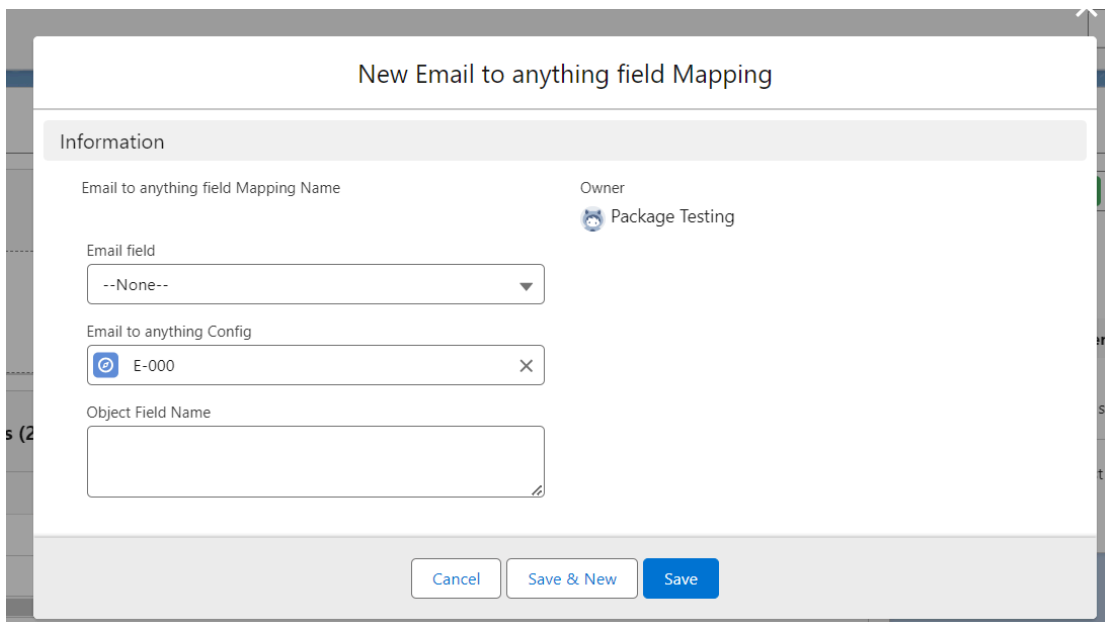
6. After creating the Email To Lead Config record, go to the related section. Click on the **New** button for Email to Lead field mapping and select field mapping using the Email field dropdown and corresponding Lead fields' API name.

(In the Email To Lead field mapping, for the "Email Field" picklist field in the object, only 16 picklist values are available. This limitation exists as Salesforce Email services accommodate these 16 fields only for email mapping.)

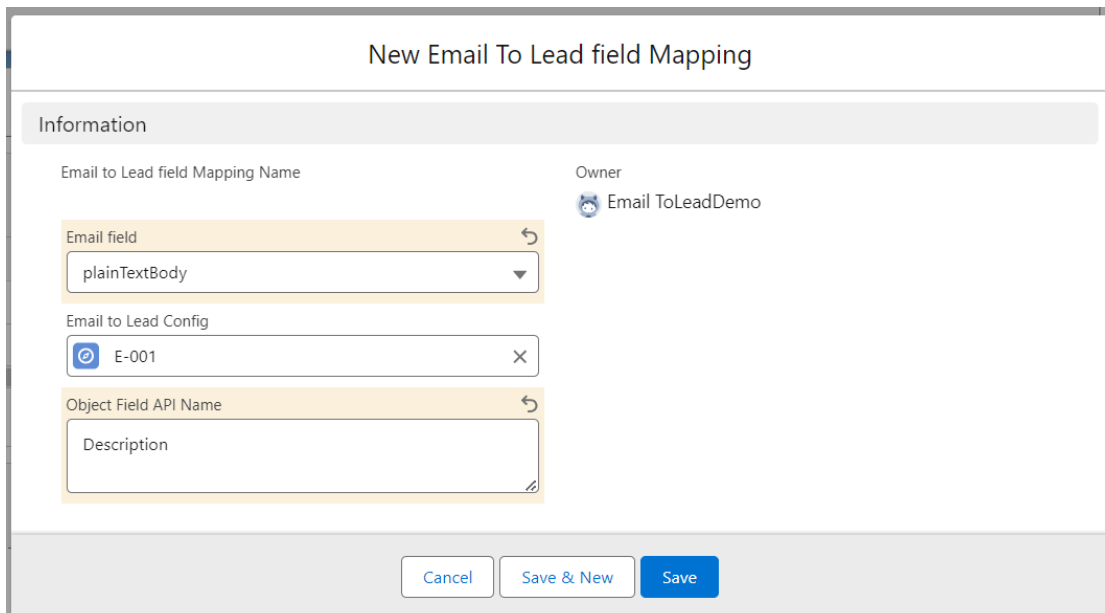
- a. When working on Email to Lead Field Mapping, we need to map plainTextBody to a Text Area field as shown in the image 1.8.



(1.6)



(1.7)

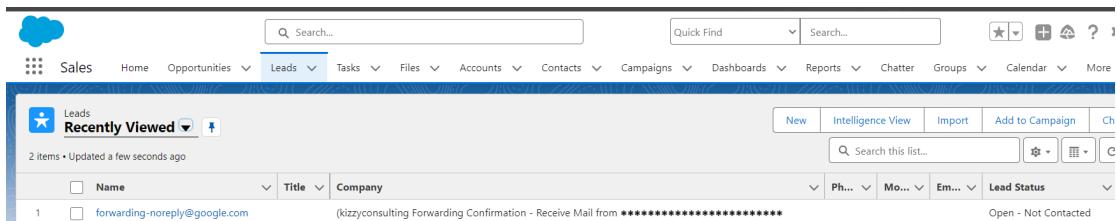


(1.8)

7. Next we use the Email ID where we wish to receive the mail. **Repeat Step 5-6** again. This time put the Email address on which we will be receiving emails

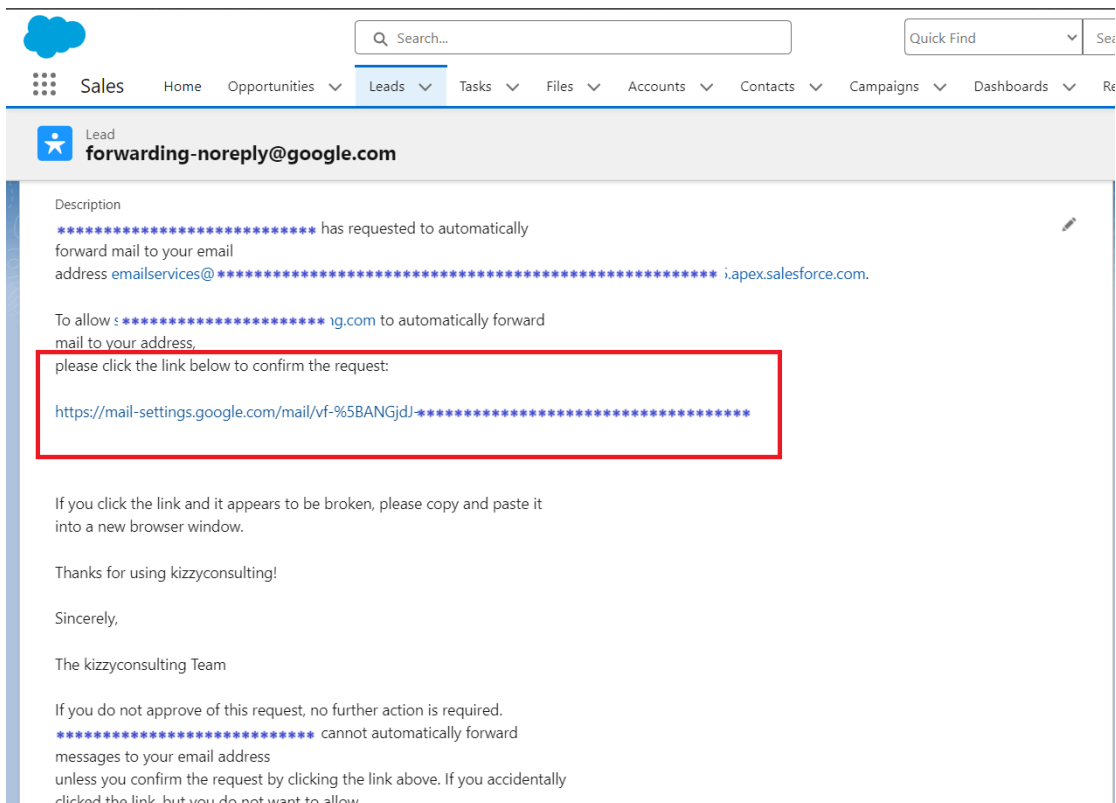
and create the related records for **Email To Lead field mapping** as done in Step 6.

8. Go to your mail address, and add the email address from Email service into the forwarding address field.
9. Once this is done, you will receive a new Lead in Salesforce. (As shown in picture below)



(1.9)

10. Open the lead and go to the Description field, in the Description field, click on the link for setting up the connection between the mail services and Salesforce. Proceed and confirm the forwarding address.



(1.10)

Your org is now all set up to garner leads from your email. Get ready to witness a surge in opportunities and propel your business to new heights! 😊