

Virtual Company Services presents:

**VCS Smart Email for
Salesforce.com**

Run your email in the
salesforce.com Cloud



VCS Smart Email
for *salesforce.com*





Winner of Appexchange
"Best of '09 Applications Award"
for Email Collaboration.

**VCS Smart Email is the
#1 ranked Native
Application!**



VCS Smart Email
for salesforce.com



Introduction

The VCS Smart Email application is:



Free: Download, Service and Technical Support.



Native: The information is stored in Salesforce.com's servers.



Aloha: No limit to the number of application downloads from the AppExchange.





VCS Smart Email
for salesforce.com



Introduction

VCS Smart Email's main feature is that it allows you to receive a copy of your emails inside salesforce.com. The email is automatically synchronized without the need to install plug-ins, thus avoiding manual sync.

Incoming Email



Gmail



You will receive a copy of
your emails in your VCS
Smart Email Inbox within
Salesforce.com



The emails are automatically
associated with leads, accounts and
contacts as activities





VCS Smart Email
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Introduction

It also allows you to associate incoming and outgoing emails to leads, contacts and cases, campaigns and opportunities.

VCS Smart Email Inbox for salesforce.com

Setup · System Log · Help · Logout

force.com VCS Smart Email Inbox

Home Leads Accounts Contacts Cases Opportunities VCS Smart Email Inbox

VCS Smart Email Inbox - Mailbox
Rep1 (sebasao@gmail.com)

Working...

Compose | Contacts | Filtering Rules | Manage Tags | Settings | Need help?

Show Alias: All

Archive Mark as Read Mark as Unread Delete More actions... Refresh

33 msgs Last »

	From	Subject	Date
Inbox (33)			
Unread (4)	Salesforce.com User Experience T	Catch-all Broaden what we know about Administrators and Force.com Developers	2010-08-19 04:52 AM
Starred (2)	support@salesforce.com	Catch-all Force.com Sandbox: Verifique la dirección de toda la organización Salesforce	2010-08-10 05:36 PM
Drafts	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 10:34 AM
Archived	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:14 AM
Deleted	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 08:13 AM
Sent	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:12 AM
All Mail	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 08:11 AM
ADMIN. LOGGING	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:08 AM
(new tag)	Juan Gmail	Juan Testeando Email Tracking	2010-08-03 02:37 PM
Catch-all	Juan Gmail	Juan Testeando Email Tracking	2010-08-03 12:13 PM
Juan	Sebastian Ortiz	Catch-all Bienvenido a MercadoPago!	2010-08-03 11:01 AM
VCS Smart Email	Sebastian Ortiz	Re: compose to Case	2010-07-12 09:36 AM
	Gmail Team	Catch-all Gmail Confirmation - Receive Forwarded Mail from rep1.vcs@gmail.com	2010-06-14 12:59 PM
	support@salesforce.com	Catch-all You have requested to change your salesforce.com email address.	2010-06-14 12:56 PM
	Seba Ortiz	Catch-all con BCC	2010-06-08 11:42 AM
	Sebastian Ortiz	TEST DESDE VCS@	2010-06-08 11:40 AM
	Seba Ortiz	TEST SMART ATT4	2010-06-08 11:38 AM





Features



VCS Smart Mail
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With this application you will be able to:

- ✉ Receive, compose, reply and forward emails from Salesforce.com.
- ✉ Receive emails only if they match existing leads or contacts (optional).
- ✉ Receive emails from different email accounts into the same inbox (use of Aliases).
- ✉ Compose emails using follow-up and HTML templates.
- ✉ Create leads, contacts, tasks, events, opportunities and cases from an incoming email.
- ✉ Manually or automatically associate all emails to leads or existing contacts, cases, opportunities and campaigns (one by one or massively).
- ✉ Perform advanced searches.
- ✉ Create and manage tags and filtering rules.
- ✉ These are some of its functionalities, among others, just as any other email service.





How is it installed?

How is it installed?



VCS Smart Email
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The application is available as a free download from the

appexchange[™]
the cloud computing marketplace

First you must select the appropriate package for your Salesforce.com edition (Group, Professional, Enterprise, Unlimited, Trial or Developer).



VCS Smart Email for Group & Professional Ed...

Inbound and ourbound email automatically associated to leads, contacts..

by Virtual Company Services 4/21/2009

★★★★★ (18)   

Group &
Professional



VCS Smart Email for Enterprise & Unlimited ...

Inbound and ourbound email automatically associated to leads, contacts..

by Virtual Company Services 10/31/2008

★★★★★ (53)   

Enterprise &
Unlimited





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How is it installed?

Once the application has been downloaded, you must create the “email service” (**your** VCS Smart Email address within salesforce.com).

See: “How to create an email service?” tutorial

Finally, you must create a redirection rule in your email service so that a copy of the email received is automatically sent to your VCS Smart Email inbox inside salesforce.com





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How is it installed?

Can other users in my organization use the application?

Yes, they can. The already created email service must be used for all the users.

✉ You must enable each user profile in salesforce.com so that the users can access the application.

✉ Each user must access their email account and set up a redirection rule from their email account to the email service you created. May be the redirection rule should be done from the server side.





How does it work?

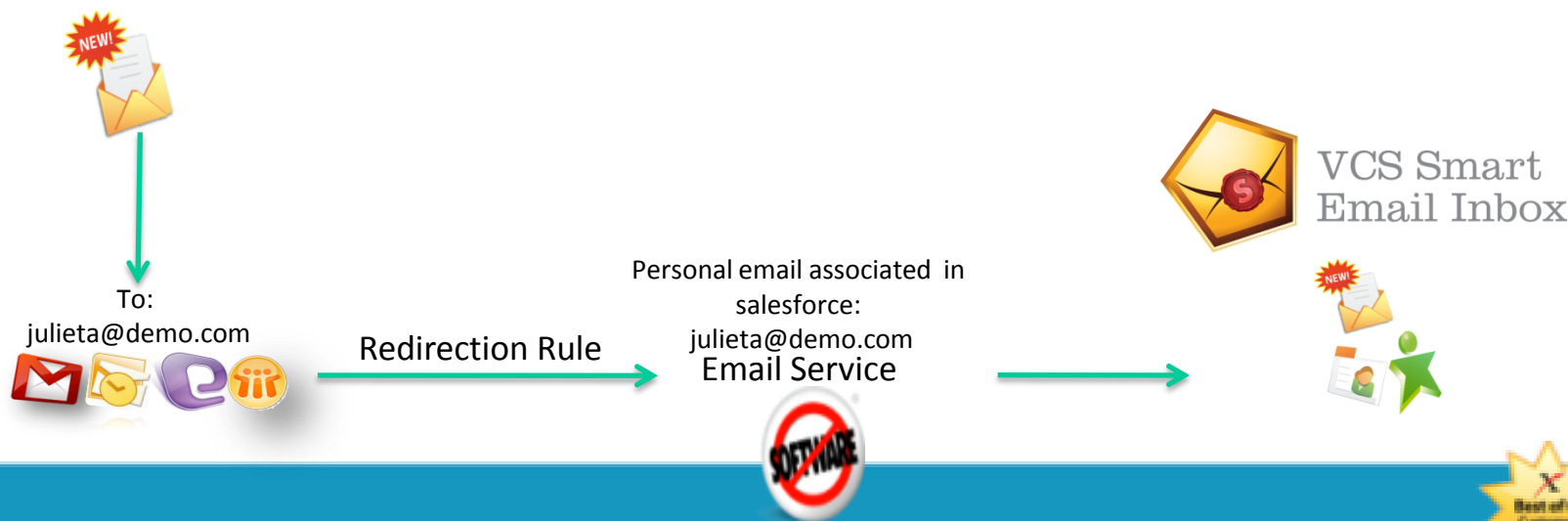


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How does it work?

The first thing you have to do is set up a redirection rule in your email service or server (depending on the type of email used). This way, you will receive a copy of your emails in your VCS Smart Email within Salesforce.com.



Within this org there are 3 users:
Cynthia, Sebastian & Julieta. All of them with a
particular email address.



Julieta receives a new email in
julieta@demo.com
(gmail, outlook, etc)



Cynthia
cynthia@demo.com



Sebastian
sebastian@demo.com



Julieta
julieta@demo.com



Incoming emails to julieta@demo.com
are redirected to the email service
created for VCS Smart Email

The email will appear in Julieta's VCS Smart Email
Julieta's email match with the user's email
address.



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How does it work?

Who can install the package?

Only the organization's Admin user can install the package from the AppExchange, create the email service and, if necessary, enable each user profile.





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How does it work?

Does it work with personal accounts?

Yes, only for versions Enterprise and Unlimited of Salesforce.com

Can I see my coworkers' emails?

This depends on the security permissions used in the configuration of your account in salesforce.com as well as on the functions, roles or profiles within company, as defined by the admin user.



How does it work?



VCS Smart Email
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Can I receive or send emails with attachments?

Yes. You can choose to receive attached files or not to.

Some considerations:

-  The maximum size of an email body is 1MB.
-  The maximum size of an email with attachments is 10 MB and the size of the files attached can be up to 3MB each.
-  Inbound attached files can be no larger than 5 MB and outbound 3 MB.

(In case of receiving an email with attachments larger than 5 MB, the email goes to the VCS Smart Email inbox and - in the attachments section - you will be notified that the file could not be stored)





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How does it work?

Can I handle more than one email account?

Yes, VCS Smart Email has a function to manage “multiple inboxes” or “Aliases”, where the same user can receive emails sent to, for example, info@yourcompany.com, ana@yourcompany.com and ana@gmail.com

See tutorial: Managing multiples inboxes or Alias





How does it work?

You can create several “Aliases” to receive emails from different email accounts in the VCS Smart Email (in addition to the account configured in salesforce.com) with the option to view them separately or together.

The screenshot shows the VCS Smart Email Inbox interface. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Cases, Opportunities, and VCS Smart Email Inbox. Below this, the main header shows 'VCS Smart Email Inbox - Mailbox' for 'Rep1' with a search bar and links for Compose, Contacts, Filtering Rules, Manage Tags, Settings, and Need help?. The 'Show Alias: All' section displays two aliases: 'Rep1@gmail.com' and 'Support'. Below this, a list of email messages is shown with columns for From, Subject, and Date. The messages include emails from Salesforce.com, support@salesforce.com, and Juan Gmail, all related to 'Testeando Email Tracking'. Two red arrows point to the 'Archive' and 'Mark as Read' buttons above the message list. The bottom right corner features a 'Best of 2009 Customer Choice' award badge.



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How does it work?

Can two or more users receive emails from the same account, for example *info@yourcompany.com*?

Yes, they can. It should be taken into account that it is not a shared inbox. That is, if John and Peter receive emails from *info@yourcompany.com*, both of them will receive the email, but neither of them will know whether it was opened or answered by the other one. To find this out, they have to go to the contact or candidate (if they have visibility) and verify the activity history.

See tutorial: Managing multiples inboxes or Alias



How does it work?



Are the emails stored as activities?

- ☑ Yes, as long as you want so. VCS Smart Email has an optional function to “Save all as activity”. This means that each time you send an email, it will be saved into the related activity list, along with the tasks, events, calls, etc.
- ☑ Before sending an email, it is possible to save it as activity. This is not a default option.
- ☑ Whatever option is chosen, the recommendation is to add the VCS Smart Email object related list to the account, contact, candidate, case, etc. page so that all object related inbound and outbound emails can be visualized.

See tutorial: How to add related lists





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How does it work?

Can I organize my emails in folders?

VCS Smart Email uses the concept of "tags" instead of "folders": an mail can have one or several tags and, even, use different colors for each of them. There is also the option to "archive" emails, so that the inbox is clean and tidy.

VCS Smart Email Inbox - Mailbox
Rep1 (sebasao@gmail.com)

Compose | Contacts | Filtering Rules | Manage Tags | Settings | Need help?

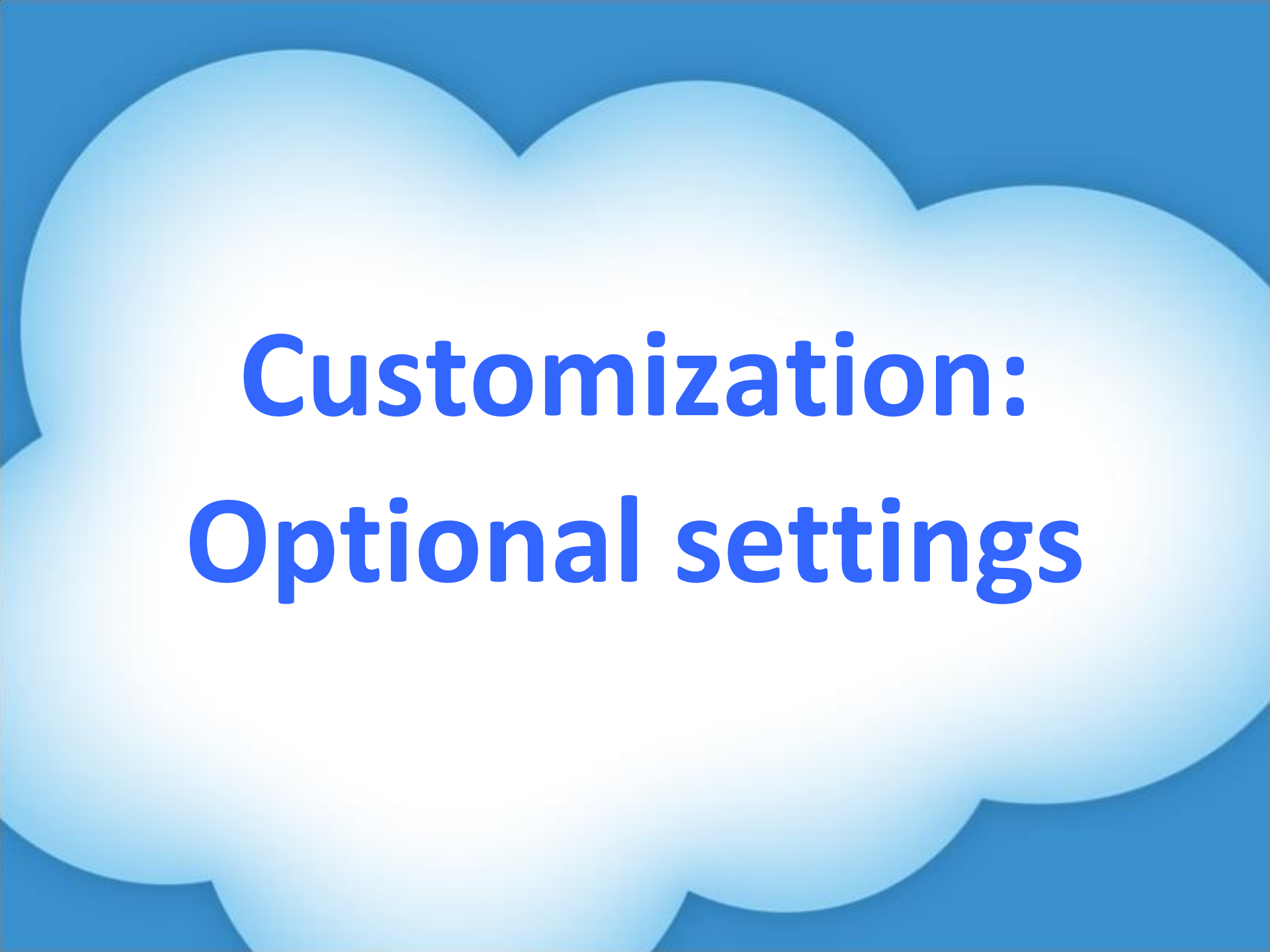
Show Alias: All

Archive | Mark as Read | Mark as Unread | Delete | More actions... | Refresh

33 msgs Last »»

	From	Subject	Date
Inbox (33)			
Unread (4)	Salesforce.com User Experience T	Catch-all Broaden what we know about Administrators and Force.com Developers	2010-08-19 04:52 AM
Starred (2)	support@salesforce.com	Catch-all Force.com Sandbox: Verifique la dirección de toda la organización Salesforce	2010-08-10 05:36 PM
Drafts	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 10:34 AM
Archived	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:14 AM
Deleted	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 08:13 AM
Sent	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:12 AM
All Mail	Juan Gmail	VCS Smart Email Juan Testeando Email Tracking	2010-08-04 08:11 AM
ADMIN. LOGGING	Juan Gmail	Juan Testeando Email Tracking	2010-08-04 08:08 AM
(new tag)	Juan Gmail	Juan Testeando Email Tracking	2010-08-03 02:37 PM
Catch-all	Sebastian Ortiz	Catch-all Sebastian Bienvenido a MercadoPago!	2010-08-03 11:01 AM
Juan	Sebastian Ortiz	Sebastian Re: compose to Case	2010-07-12 09:36 AM
VCS Smart Email	Gmail Team	Catch-all Gmail Confirmation - Receive Forwarded Mail from rep1.vcs@gmail.com	2010-06-14 12:59 PM
Sebastian	support@salesforce.com	Catch-all You have requested to change your salesforce.com email address.	2010-06-14 12:56 PM
	Seba Ortiz	Catch-all con BCC	2010-06-08 11:42 AM
	Sebastian Ortiz	Sebastian TEST DESDE VCS@	2010-06-08 11:40 AM





Customization: Optional settings



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Optional Settings

User interface:

Incoming email
sound alert

Number of emails
per page

Details of the
association performed

General:

Only receive emails from
leads or existing contacts

Associate outgoing
emails

Auto Signature





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Customization

Integration

- ✉ Auto-create Leads.
- ✉ Separate name and last name in different fields when creating new leads.
- ✉ Log all emails as activities
- ✉ Use cases, personal accounts, campaigns, opportunities, leads and contacts for logins.

Other actions

- ✉ Starred emails.
- ✉ Massive actions (delete, associate, archive, etc).
- ✉ Drag&Drop.





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Some considerations:

The emails received take up storage space.

It is not available for mobiles.

It is not compatible with custom objects.



Thank you!

More information:

<http://smartemail.vcs.com.ar>