

# Email to Something



## SETUP INSTRUCTIONS

- 1) Install the application, by clicking Get It Now from Appexchange.
- 2) Setup the accepted fields. Go to Develop -> Custom Settings, **Object From Email Accepted Fields** and click Manage. This is where you add the fields that are updated when an email is received. Click New to add a new accepted field. Enter a name, the object API name and field API name and Save.

### Object From Email Accepted Fields Edit

Provide values for the fields you created. This data is cached with the application.

The form is titled "Edit Object From Email Accepted Fields" and includes "Save", "Save & New", and "Cancel" buttons. Below the title is a section header "Object From Email Accepted Fields Information". The form contains three input fields: "Name" with the value "Case Subject", "Field Name" with the value "Subject", and "Object Name" with the value "Case". Each input field has a small blue information icon to its right.

- 3) Setup the default fields. Go to Develop -> Custom Settings, **Object From Email Default Fields** and click Manage. This is where you add the fields that the application will set with default values when creating an object. Click New to add a new default field. Enter a name, the object API name, field API name and, depending on the field type, a default value. Click Save.

### Object From Email Default Fields Edit

Provide values for the fields you created. This data is cached with the application.

The form is titled "Edit Object From Email Default Fields" and includes "Save", "Save & New", and "Cancel" buttons. Below the title is a section header "Object From Email Default Fields Information". The form contains several input fields: "Name" with the value "Case Type", "Default Value Checkbox" with an unchecked checkbox, "Default Value DateTime" with a date and time value "[ 6/28/2011 1:44 AM ]", "Default Value Date" with a date value "[ 6/28/2011 ]", "Default Value Number" with an empty field, "Default Value Text" with the value "Email", "Field Name" with the value "Type", and "Object Name" with the value "Case". Each input field has a small blue information icon to its right.

- 4) Setup the email service. Go to Develop -> Email Services. Click New Email Service, Add a name, select **CreateObjectFromEmail** for Apex class, add other settings you need and click Save. Don't forget to activate the email service before using it.

The screenshot shows the Salesforce Email Service configuration interface. At the top, there are three buttons: 'Save', 'Save and New Email Address', and 'Cancel'. The main content is divided into two sections. The first section, 'Email Service Information', contains several configuration options: 'Email Service Name' is set to 'Test Email - Case'; 'Apex Class' is set to 'CreateObjectFromEmail'; 'Accept Attachments' is set to 'None'; 'Advanced Email Security Settings' is unchecked; 'Accept Email From' is an empty text area; 'Truncate Oversize Email (Text and HTML)' is unchecked; 'Convert Text Attachments to Binary Attachments' is unchecked; and 'Active' is unchecked. The second section, 'Failure Response Settings', contains five dropdown menus for different failure scenarios, all set to 'Discard message': 'Over Email Rate Limit Action', 'Deactivated Email Address Action', 'Deactivated Email Service Action', 'Unauthenticated Sender Action', and 'Unauthorized Sender Action'. There is also an 'Enable Error Routing' checkbox which is unchecked, and a 'Route Error Emails to This Email Address' field which is empty.

Click on New Email Address, add the details and click Save. An email address will be generated. This email address can be used for the email service.

- 5) Send test email. Send an email to that email address to test the email service.

The **subject of the email** need to be in the following format: "New ObjectApiName" (for example: "New Case", "New Custom\_Object\_\_c").

The **body of the email** needs to be a set of [FieldAPIName]={FieldValue} constructs, where FieldAPIName is the API name of the field to be set and FieldValue is the value you want to add to that field (for example: "[Subject]={Subject} , [Number\_Of\_Hours\_\_c]={24}").