

VCS Smart Email Inbox for salesforce.com



Customizing Tips

Join the new email Generation

By Virtual Company Services



With VCS Email Inbox for Salesforce.com it's easier than ever to have your email inside salesforce.com. Integrated email has finally arrived for all salesforce.com customers

<http://www.vcs.com.ar/v-smart-overview.html>

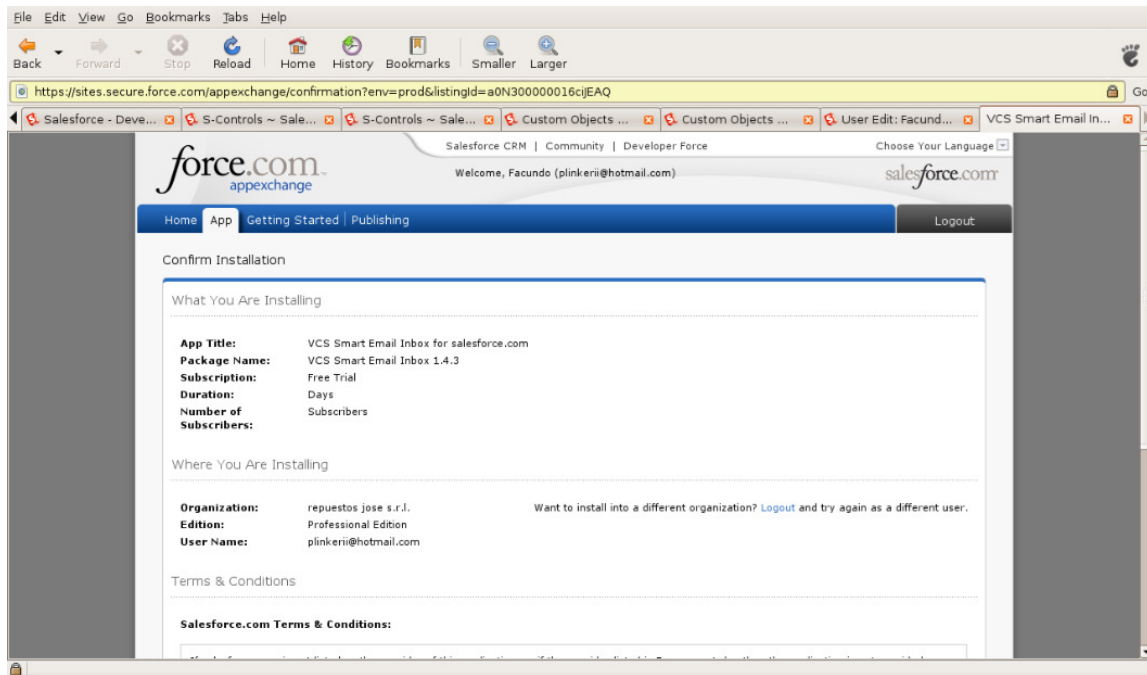
support@virtualcompanyservices.com

Tips

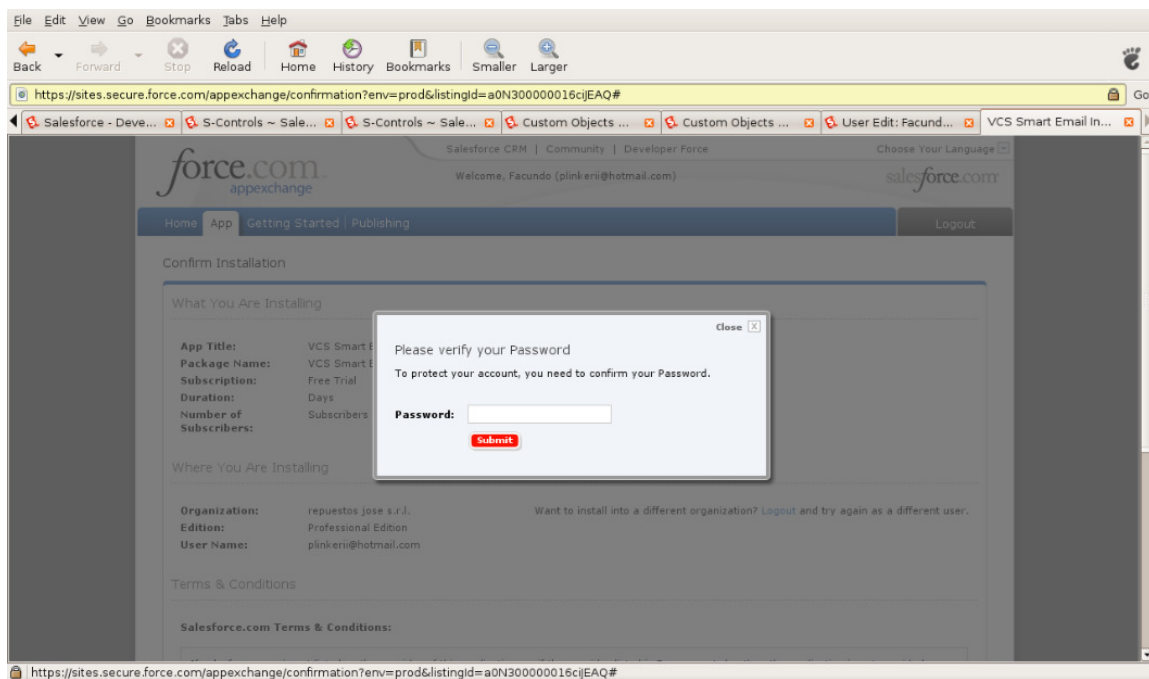
- Installing the VCS Email Inbox for salesforce.com from the appexchange.
- Setting up.
 - Creating an Email Service
 - Don `t have the “mailbox” option
- Add the VCS Email related list to the different page layouts
- How to put visible buttons in the related Lists
- How to deploy in other users if I am the admin
 - Enable profiles
 - Enable Visualforce pages
- Some frequent/common troubles

Installing from the Appexchange

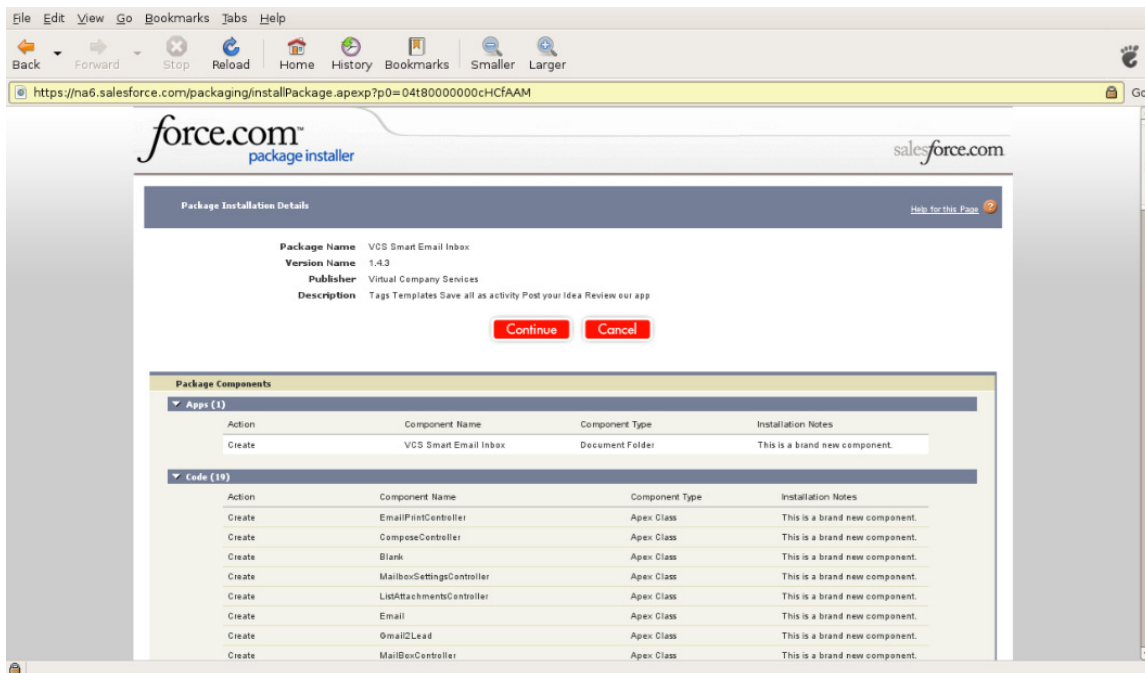
- 1- Go to the appexchange and get it now.
- 2- Go to the bottom of the page and press Next



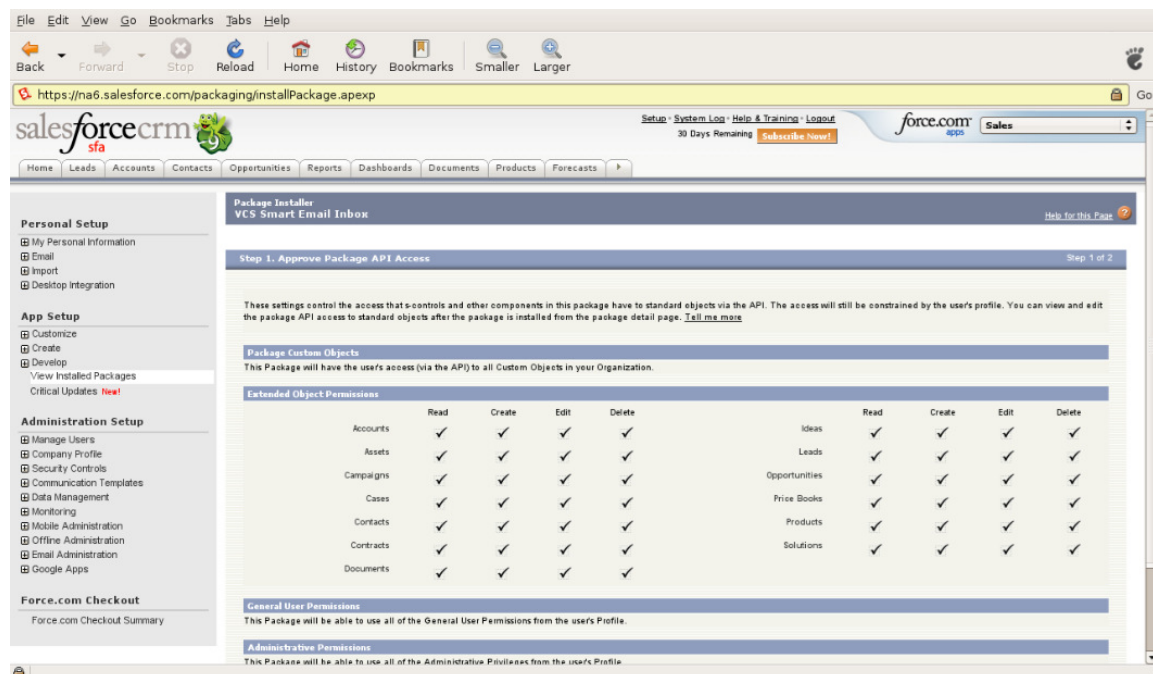
- 3- Enter your Administrator Password and click on "Submit"



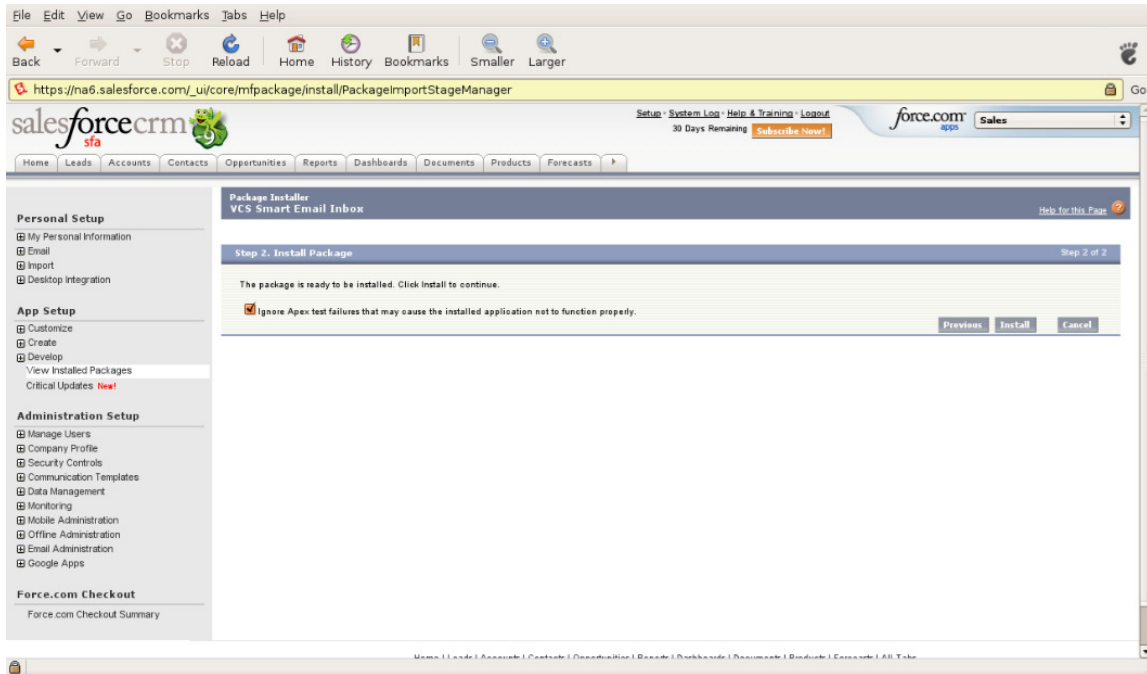
4- Press the "continue" button



5- Go to the bottom of the page and press "Next"



6- Check the “Ignore apex tests...” checkbox and press “Install”

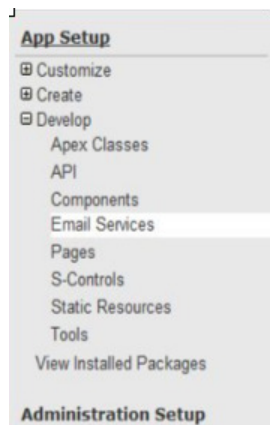


7- The system goes into a waiting screen for a few seconds.

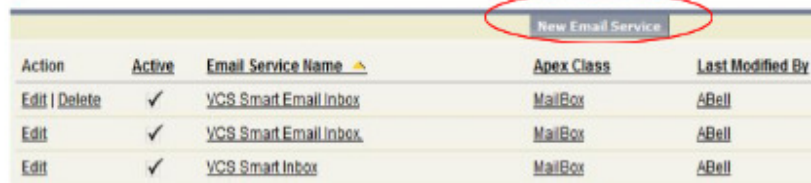
Now, it's available in your org.

1- Creating an Email Service

- a. Login with Login in to your Salesforce account, with admin privileges.
- b. Go Set-up / Develop / Email Services

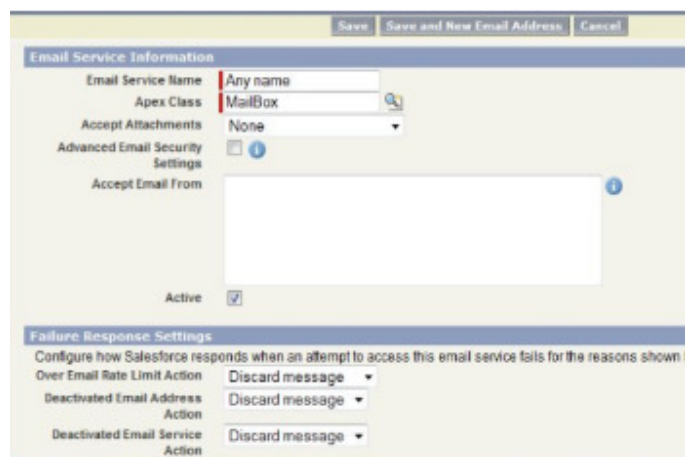


- c. Click on "New Email Service" button

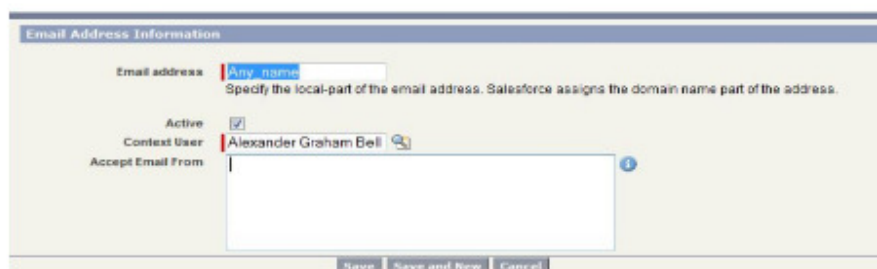


Action	Active	Email Service Name	Apex Class	Last Modified By
Edit Delete	☒	VCS Smart Email Inbox	MailBox	ABell
Edit	☒	VCS Smart Email Inbox	MailBox	ABell
Edit	☒	VCS Smart Inbox	MailBox	ABell

- d. Choose a Email Service Name (*i.e smart.inbox*)
e. Apex Class: **Mailbox** (*if you don't find Mailbox apex class see below*)
f. Accept Attachments: **All**
g. Check the **Active** check box
h. Click on "Save and new Email Address" button
i. Set the picklists all to "Bounce message" in the Failure Response Settings



- j. Choose an Email Address, this will be before an @in.salesforce.com domain
k. Check the Active check box
l. Select a context user, to the email service to save the incoming emails.
m. Leave blank the accept emails from text area
n. Click on the "Save" button

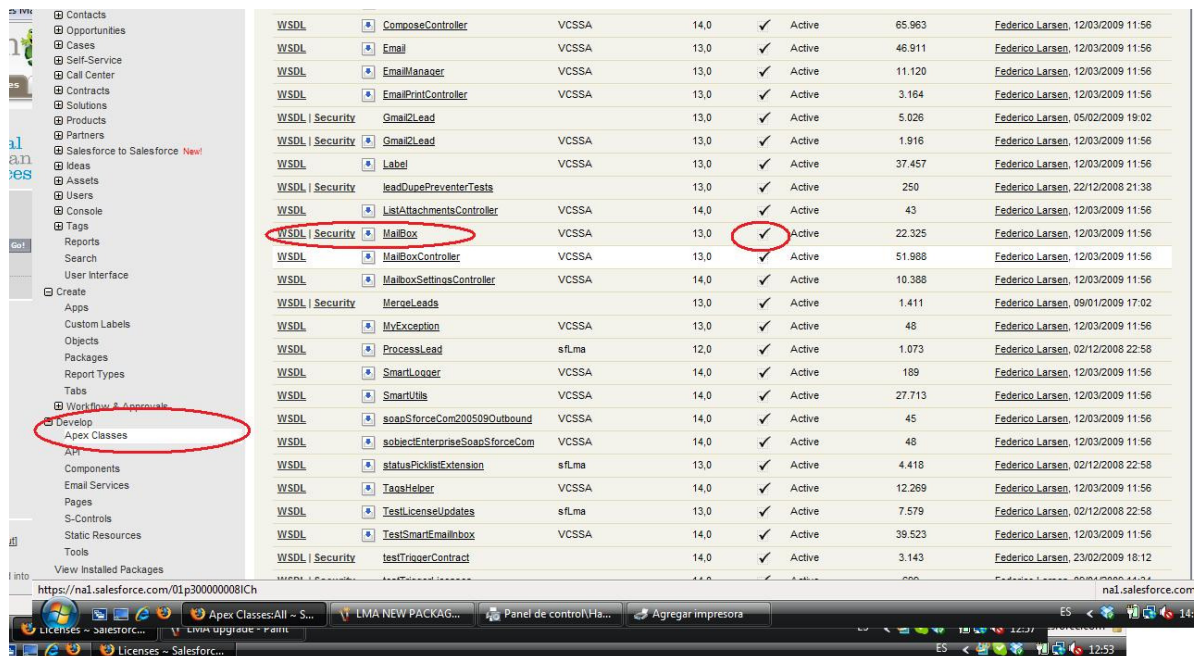


m- Copy the resulting email address for the service

Email Addresses			New Email Address
Action	Email Address	Context User	
View Edit	any_name@a-644rox1xskcmp8c18xe8pbm1.in.salesforce.com	Alexander Graham Bell	

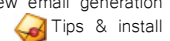
You may probably don't have the Mailbox option. In case you don't see it, then follow this steps

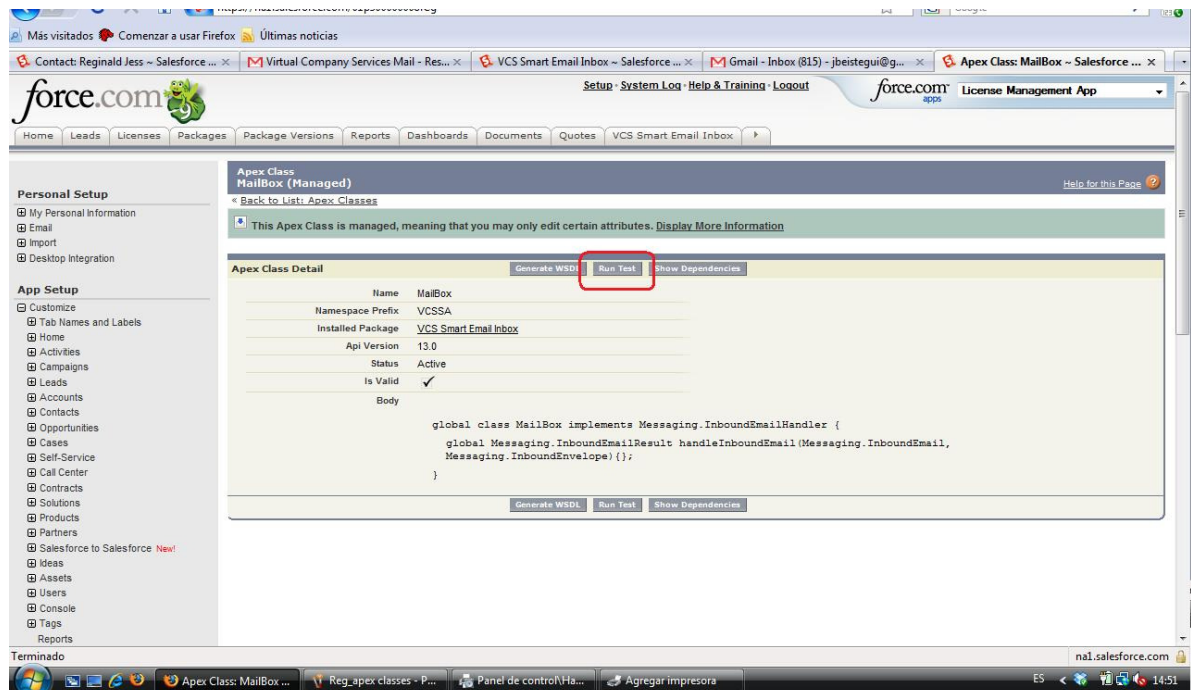
1. Go to setup
2. App Setup
3. Develop
4. Apex Classes
5. look for Mailbox (see the screenshot 1 I attached)
6. click on Mailbox (you may probably have it inactive)
7. Run the test (see the screenshot)
8. You will have it activated.
9. Then, try again creating the email service and choose Mailbox!!



Class Name	Category	Version	Status	Created By	Created Date
ComposeController	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
Email	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
EmailManager	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
EmailPrintController	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
Gmail2Lead	WSDL Security	13.0	Active	Federico Larsen	05/02/2009 19:02
Gmail2Lead	WSDL Security	13.0	Active	Federico Larsen	12/03/2009 11:56
Label	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
leadDupePreventerTests	WSDL Security	13.0	Active	Federico Larsen	22/12/2008 21:38
ListAttachmentsController	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
Mailbox	WSDL Security	13.0	Active	Federico Larsen	12/03/2009 11:56
MailboxController	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
MailboxSettingsController	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
MergeLeads	WSDL Security	13.0	Active	Federico Larsen	09/01/2009 17:02
MyException	WSDL	13.0	Active	Federico Larsen	12/03/2009 11:56
ProcessLead	WSDL	12.0	Active	Federico Larsen	02/12/2008 22:58
SmartLoader	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
SmartUtils	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
soapSforceCom200509Outbound	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
subjectEnterpriseSoapSforceCom	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
statusPicklistExtension	WSDL	13.0	Active	Federico Larsen	02/12/2008 22:58
TagHelper	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
TestLicenseUpdates	WSDL	13.0	Active	Federico Larsen	02/12/2008 22:58
TestSmartEmailInbox	WSDL	14.0	Active	Federico Larsen	12/03/2009 11:56
testTriggerContract	WSDL Security	14.0	Active	Federico Larsen	23/02/2009 18:12

Join the new email generation



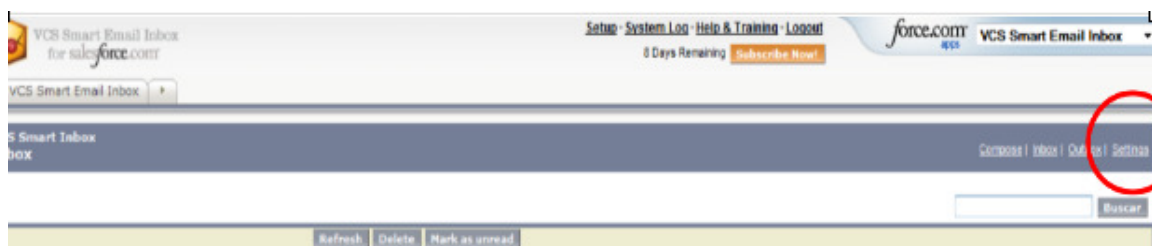


2. Redirect your incoming email to the new address of Email Service created in step 2
 - a. You can forward it from your email client by adding a rule/filter/redirection
 - b. You can contact your IT department

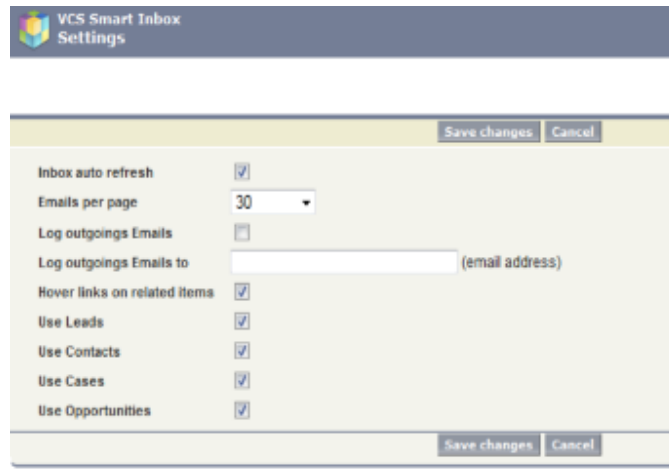
Note: that the service will create a new unread message owned by each recipient that matches with an active user email on your organization.

Setting Up

1. Once you have installed it, go to the VCS Smart Email Inbox
2. Settings



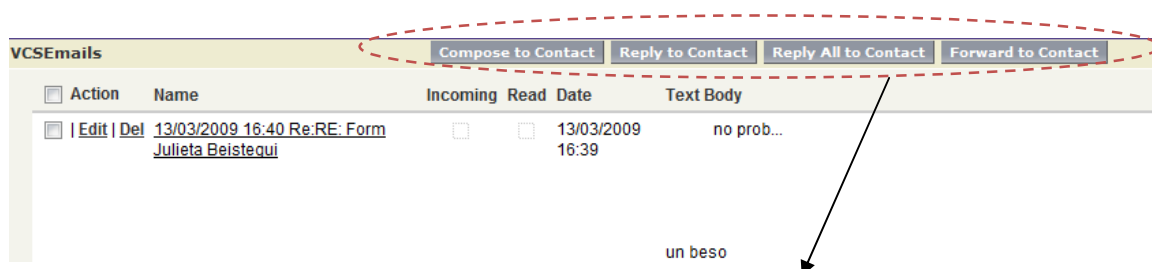
3. Choose how many emails per page, and check leads, contacts, cases and opportunities, etc



How to put visible buttons on the related Lists

Here are some tips to customize, once you have installed it and once you have redirected your email

1. Be sure to customize the VCS Email Inbox tab in your custom app (All tabs --> customize my tabs)
2. Be sure to add the VCS Email related lists to each object (Setup --> App Setup --> customize --> "object" (leads, contact, cases, etc) -->Page layout)
3. Be sure to add (once you have added the related lists) the buttons on each related list.

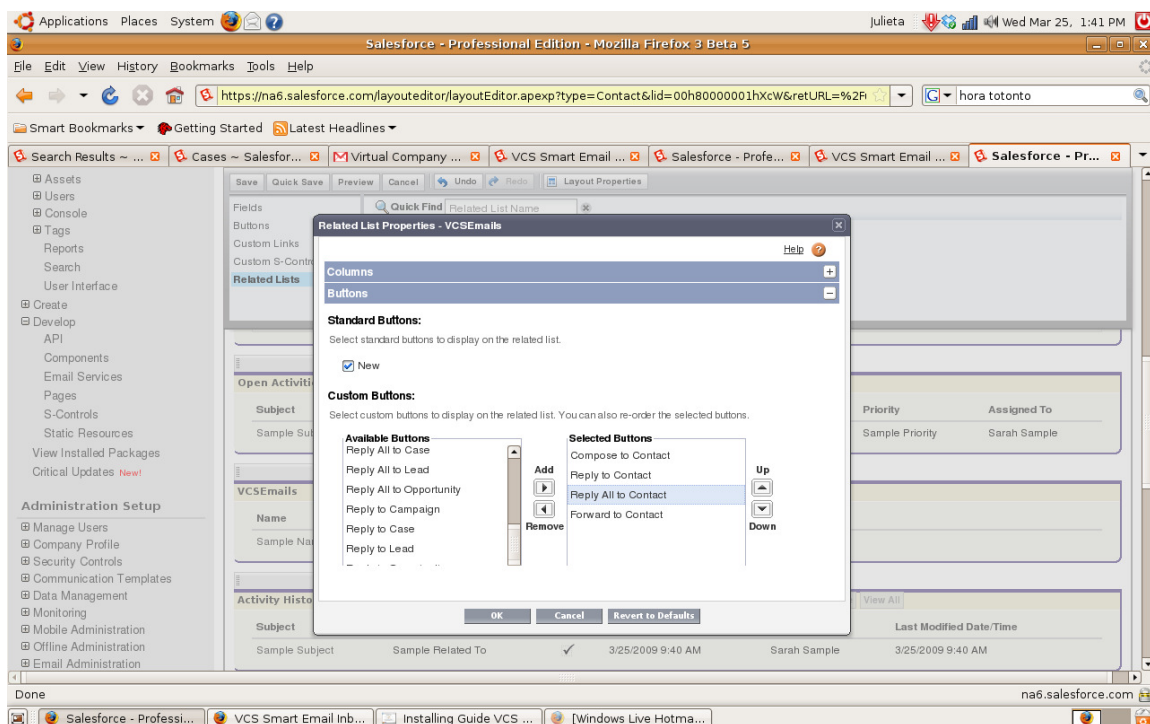


It's really useful to have the compose, reply/all, forward buttons visible in each object related list. This way, you don't have to go to your inbox to have some action on the emails.

Follow these steps to have them visible.

Note: You should do this with each object.

1. Setup > Customize > "object" (i.e Leads) > Page Layouts
2. Be sure you have already added the VCS Email Related List
3. Click "Properties" in the VCS Email related list. Show Button section
4. Add Compose, Reply, Reply all & Forward buttons (related to the object).
5. Save changes



Applications Places System Julietta Wed Mar 25, 1:37 PM

Salesforce - Professional Edition - Mozilla Firefox 3 Beta 5

File Edit View History Bookmarks Tools Help

<https://na6.salesforce.com/layouteditor/layoutEditor.apexp?type=Account&lid=00h80000001hXcR&retURL=%2F> hora totonto

Smart Bookmarks Getting Started Latest Headlines

Search Results ~ ... Cases ~ Salesfor... Virtual Company ... VCS Smart Email ... Salesforce - Profe... VCS Smart Email ... Salesforce - Pr...

Save Quick Save Preview Cancel Undo Redo Layout Properties

Fields Quick Find Related List Name

Activity History Contacts Opportunities

Assets Contracts Partners

Cases Notes & Attachments VCSEmail

Contact Roles Open Activities

Related Lists

VCSEmail New

Related List Properties

Name

Sample Name

Activity History Log A Call Mail Merge Send An Email Compose Gmail Request Update View All

Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Name	Sample Related To	✓	3/25/2009 9:33 AM	Sarah Sample	3/25/2009 9:33 AM

Opportunities New

Opportunity Name	Stage	Amount	Close Date
Sample Opportunity Name	Sample Stage	\$123.45	3/25/2009

Done na6.salesforce.com

Salesforce - Profe... VCS Smart Email Inb... Installing Guide VCS ... [Windows Live Hotma...

Applications Places System Julietta Wed Mar 25, 1:37 PM

Salesforce - Professional Edition - Mozilla Firefox 3 Beta 5

File Edit View History Bookmarks Tools Help

<https://na6.salesforce.com/layouteditor/layoutEditor.apexp?type=Account&lid=00h80000001hXcR&retURL=%2F> hora totonto

Smart Bookmarks Getting Started Latest Headlines

Search Results ~ ... Cases ~ Salesfor... Virtual Company ... VCS Smart Email ... Salesforce - Profe... VCS Smart Email ... Salesforce - Pr...

Save Quick Save Preview Cancel Undo Redo Layout Properties

Fields Quick Find Related List Name

Activity History Contacts Opportunities

Assets Contracts Partners

Cases Notes & Attachments VCSEmail

Contact Roles Open Activities

Related Lists

VCSEmail New

Related List Properties

Name

Sample Name

Activity History Log A Call Mail Merge Send An Email Compose Gmail Request Update View All

Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Name	Sample Related To	✓	3/25/2009 9:33 AM	Sarah Sample	3/25/2009 9:33 AM

Opportunities New

Opportunity Name	Stage	Amount	Close Date
Sample Opportunity Name	Sample Stage	\$123.45	3/25/2009

Related List Properties - VCSEmail

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

Bcc Campaign Case Cc Contact Created By

Selected Fields

Name

Up Down

Sort By: --Default--

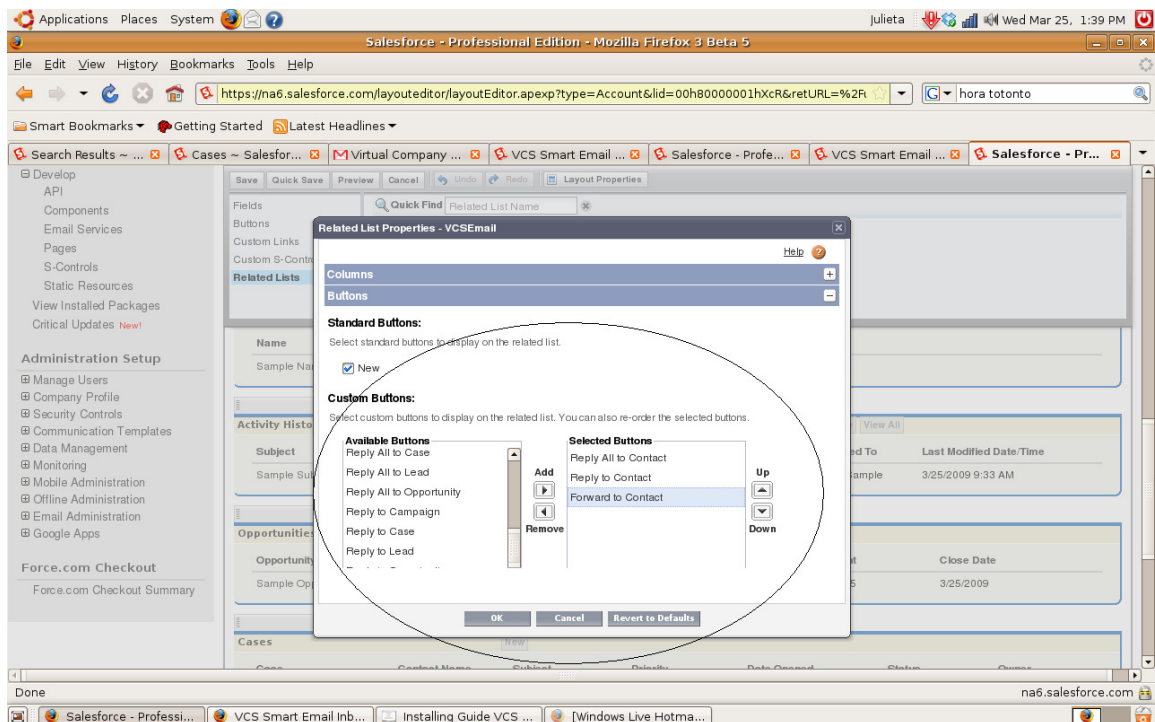
☒ Ascending ☐ Descending

Buttons

OK Cancel Revert to Defaults

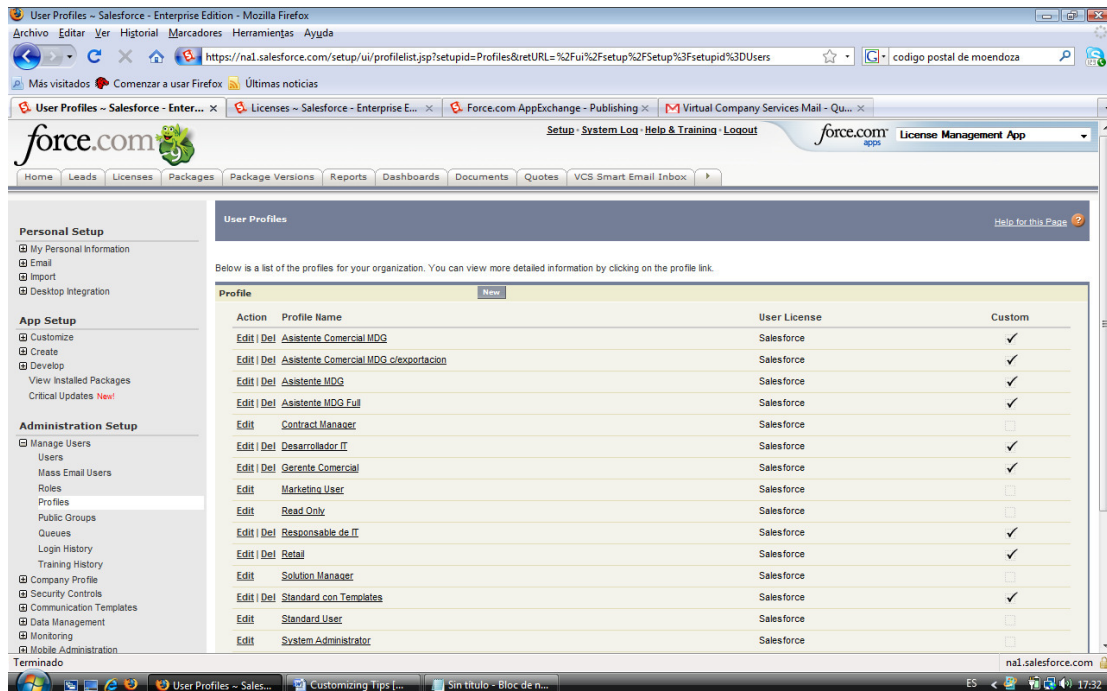
Done na6.salesforce.com

Salesforce - Profe... VCS Smart Email Inb... Installing Guide VCS ... [Windows Live Hotma...

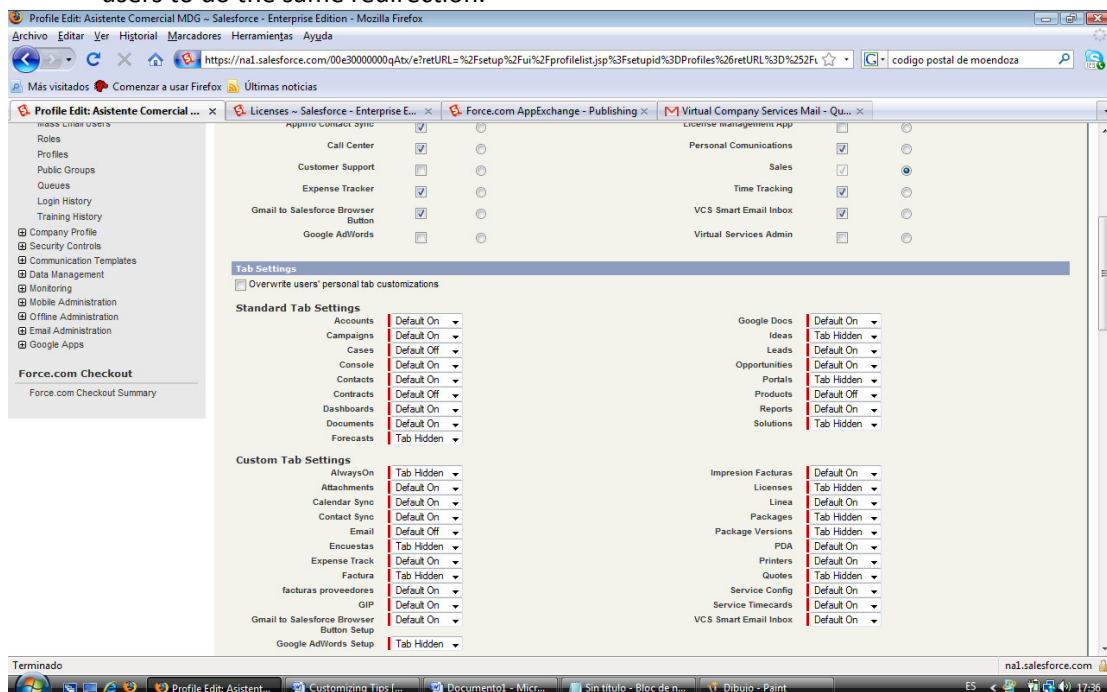


How to Deploy in other users...

- Setup
- Administration Setup
- Manage users
- Profiles → There you should choose the profile you wish to add the VCS Email → Edit



- Ensure that VCS Smart Inbox is visible (custom settings apps) and the VCS Smart tab setting "default on".
- Then, send the same email you created (the same the admin used) and make the other users to do the same redirection.

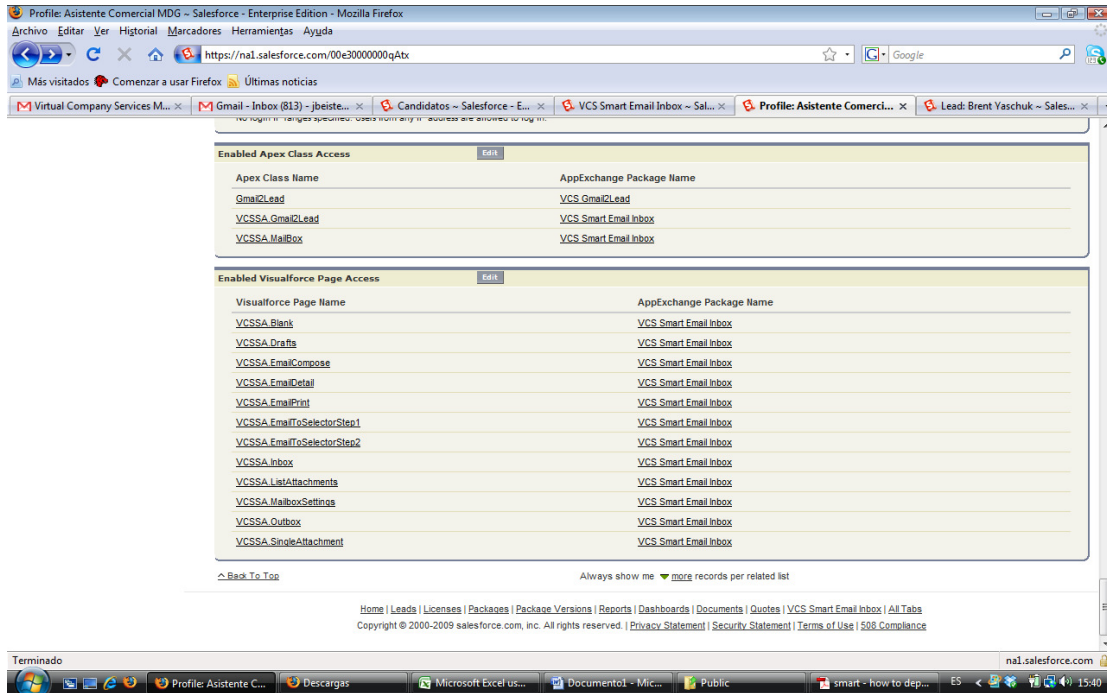


If the other users “don’t have sufficient privileges to see the inbox

Lets check out if each profile has Visualforce Page Access enabled.

Setup → Manage User → Profiles.

Choose one profile and drill down to the bottom of the page until the section “**Enabled Visualforce Page Access**”

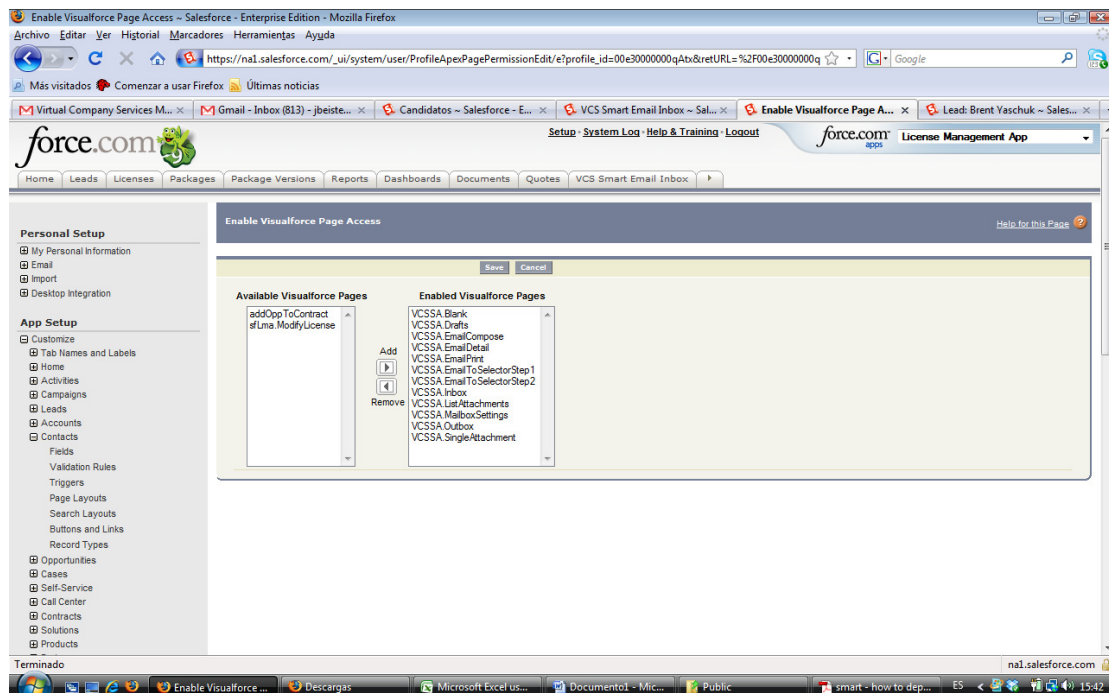


The screenshot shows the Salesforce Enterprise Edition interface. The browser window is titled 'Profile: Asistente Comercial MDG - Salesforce - Enterprise Edition - Mozilla Firefox'. The address bar shows 'https://na1.salesforce.com/00e30000000q4tx'. The page displays the 'Enabled Visualforce Page Access' section for a profile. This section contains a table with two columns: 'Visualforce Page Name' and 'AppExchange Package Name'. The table lists various Visualforce pages and their corresponding package names, all of which are 'VCS Smart Email Inbox'.

Visualforce Page Name	AppExchange Package Name
VCSSA Blank	VCS Smart Email Inbox
VCSSA Drafts	VCS Smart Email Inbox
VCSSA EmailCompose	VCS Smart Email Inbox
VCSSA EmailDetail	VCS Smart Email Inbox
VCSSA EmailPrint	VCS Smart Email Inbox
VCSSA EmailToSelector/Step1	VCS Smart Email Inbox
VCSSA EmailToSelector/Step2	VCS Smart Email Inbox
VCSSA Inbox	VCS Smart Email Inbox
VCSSA ListAttachments	VCS Smart Email Inbox
VCSSA MailboxSettings	VCS Smart Email Inbox
VCSSA Outbox	VCS Smart Email Inbox
VCSSA SingleAttachment	VCS Smart Email Inbox

If you don’t see all the VCS Visualforce pages, then, they may probably cant see the inbox.

Edit→and enable all the vcs available Visualforce pages.



Common Questions

- I have sales reps that have 2 email addresses. Is there any problems having both forwarded to the VCS Inbox?

All the users of the org redirect their emails to the same smart address, then smart distribute to each one.

Some frequent/common troubles

Frequent answer when the app fails twice

During the installation, may be or may be not, you may experience any trouble. Just in case you do so, at the end of this email, there is a description of a common problem, and the solution.

There is nothing to worry about these errors. The application install does hundreds of tests, and this particular 2, fails in some orgs and do not fails in some others. But anyway, this errors does not affect the usability because never happen in the practice.

Until we can remove them from the installation process, please check the "Ignore Apex test failures ..." in the installation wizard.

Problem - I sent an email to the service and does not appears in the inbox

If you send an email only to the email service address, I will not associate that email to any salesforce user, therefore it will be discarded.

The service will try to match recipients (TO and CC) to active salesforce users by their email address, as well as senders to Leads and Contacts.

So when you do a redirection, you need to preserve the original senders and recipients of the email. Gmail does it right and most of server-side redirections. In outlook you have to add yourself in the redirection rule.

If you want to make a quick test, send an email to you as the recipient (the email address of your salesforce user) and bcc the email service address. Then you will have it right inside the vcs inbox.

Howto Outlook Redirection rules

In order to redirect your email to salesforce.com in case you use Outlook, you need to create 2 rules.

- 1) Redirect incoming email sent to "You" to: "You" and "Email Service Address"
- 2) Email sent to "Email Service Address", delete it.

The second rule, is a work around because of how outlooks does the redirection, it will create you an extra copy of the message so this rule is to delete it.

You may also want to mark as read or move the email in outlook because it is already in salesforce.com as a new unread message. In that case, add the second action to the first rule.

How to create a Redirect rule?

Please use this guide

<http://office.microsoft.com/en-us/outlook/HA011502011033.aspx>

Common troubles

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particular 2, fails in some orgs and do not fails in some others. But anyway, this errors does not affect the usability because never happen in the practice.

Until we can remove them from the installation process, please check the "Ignore Apex test failures ... " in the installation wizard.

Description of the Problem:

1. Apex Classes(01p800000009BYt) mailboxcontroller.
testControllerV();

mailboxcontroller.testControllerIV();

mailboxcontroller.testControllerII();

mailboxcontroller.testControllerIII()

System.Exception: Assertion Failed: Expected: 0, Actual: 2 (VCSSA);

System.Exception: Assertion Failed: Expected: 0, Actual: 1 (VCSSA);

System.Exception: Assertion Failed: Expected: false, Actual: true (VCSSA);

System.NullPointerException: Argument 1 cannot be null (VCSSA)

2. Apex Classes(01p800000009BYv) testsmartemailinbox.

testCompose();

testsmartemailinbox.testViewEmail();

testsmartemailinbox.testSelectorIII();

testsmartemailinbox.testMarkAsUnread();

testsmartemailinbox.testCRMMethods();

testsmartemailinbox.testSelectorII()



System.NullPointerException: Argument 1 cannot be null (VCSSA);

System.Exception: Assertion Failed: Same value: null (VCSSA);

System.Exception: Assertion Failed: Same value: null (VCSSA);

System.Exception: Assertion Failed: Expected: false, Actual: true (VCSSA);

System.Exception: Assertion Failed: Expected: 0, Actual: 1 (VCSSA);

System.Exception: Assertion Failed: Expected: 0, Actual: 2 (VCSSA)