Usage Instructions

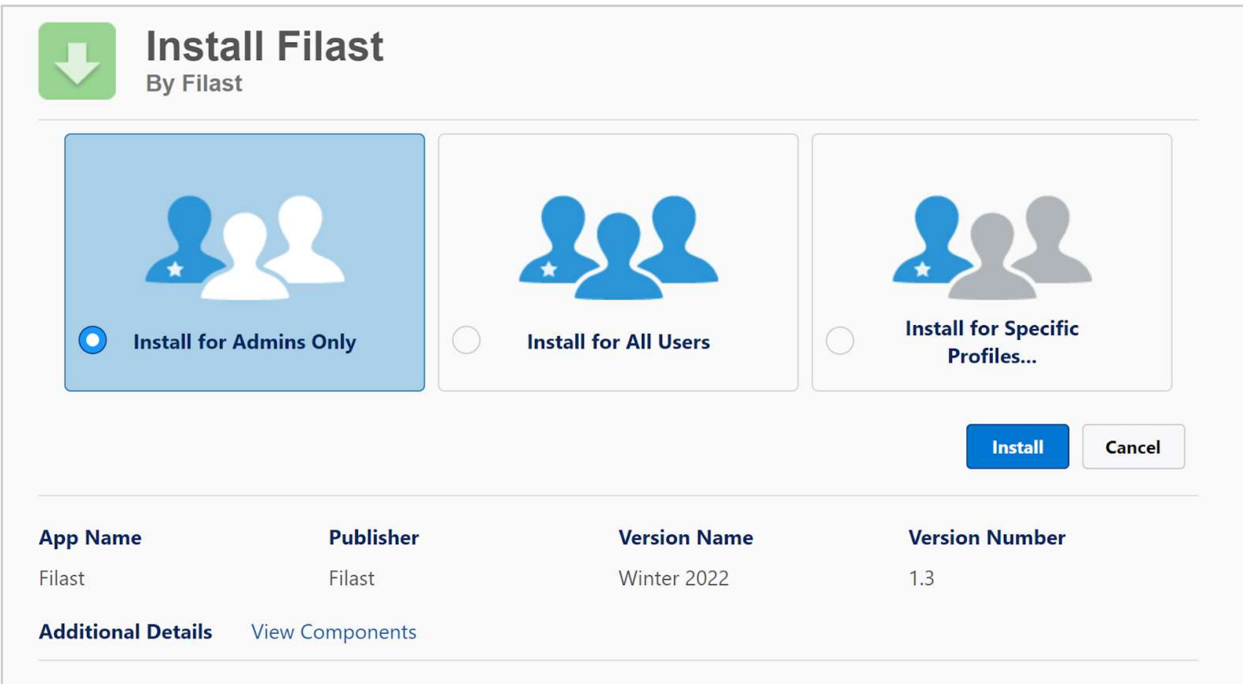
Filast

Install the Application

1. Install the Filast package into your Salesforce organization, by clicking on the following link:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000SKVG&isdtp=p1

2. Select 'Install for Admins Only' (recommended)

3. Click **Install**



Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with http://test.salesforce.com

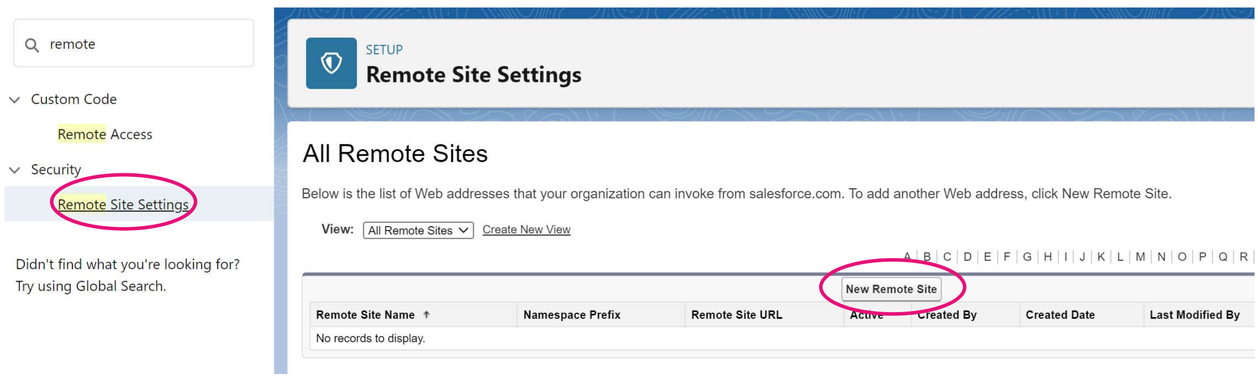
Configure the Remote Site Settings

This app integrates with technology external to the Salesforce Platform. It sends Contact Names, Contact Email Addresses, Account Names, and Account Ids to a program that then determines email syntaxes for your Account records. In order for this app to work, you need to authorize the external site.

1. Login to Salesforce

2. Navigate to the Setup

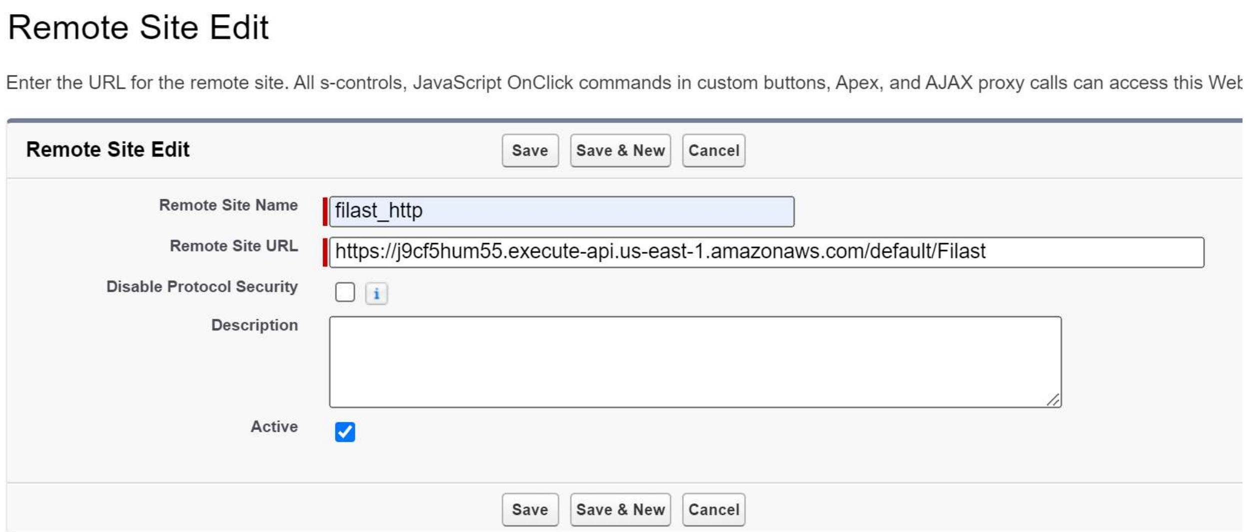
3. Use the search bar in the top right corner to find “Remote Site Settings”



4. Click **New Remote Site**

5. Enter a descriptive term for “Remote Site Name” (e.g., filast_http)

6. Paste the following link into the “Remote Site URL”:
https://j9cf5hum55.execute-api.us-east-1.amazonaws.com/default/Filast



7. Click **Save** to finish

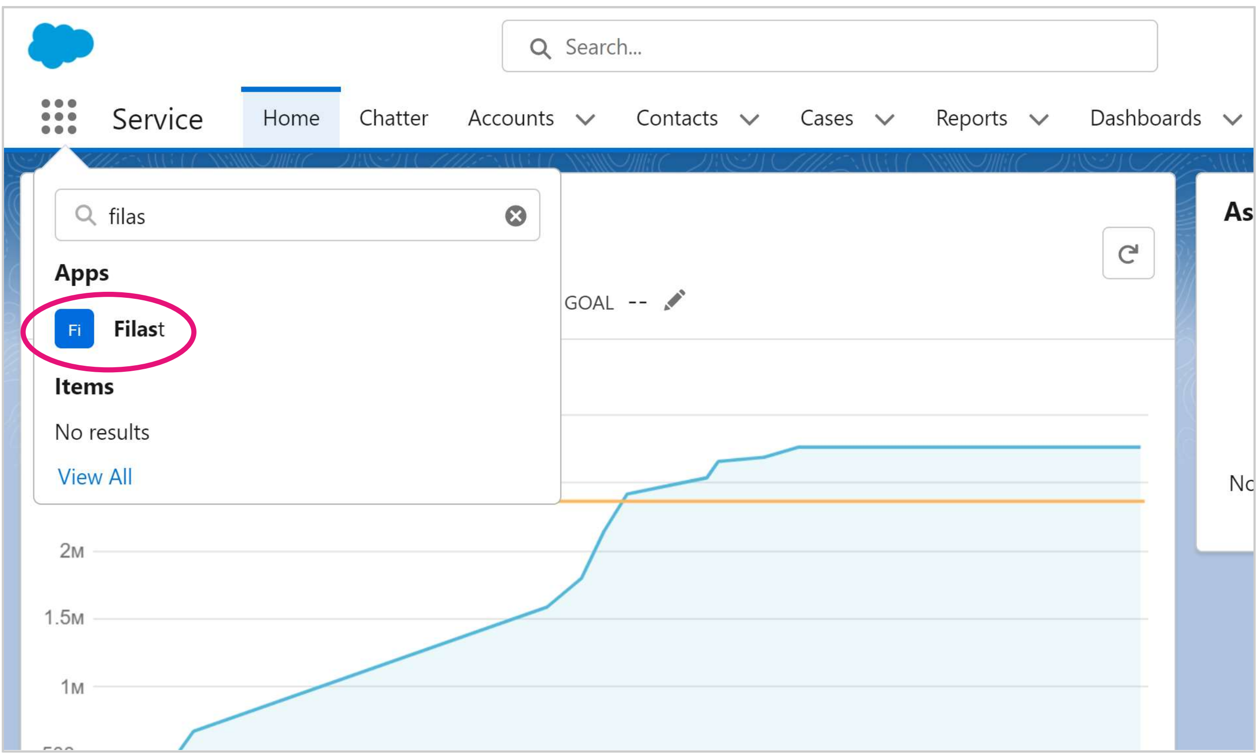
Open the App

1. Login to Salesforce

2. Switch to Lightning Experience

3. Click on the App Launcher in the upper left hand corner

4. Click the Filast app

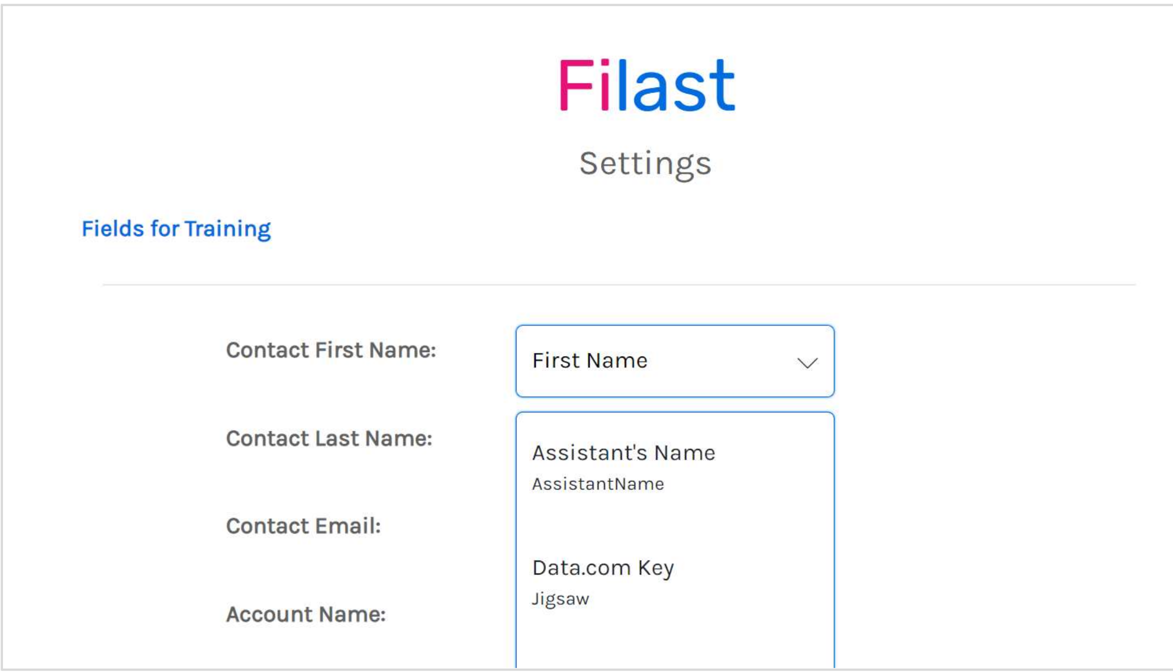


Configure the App Settings

Once you have successfully opened Filast, you are ready to configure the application.

1. Fields for Training:

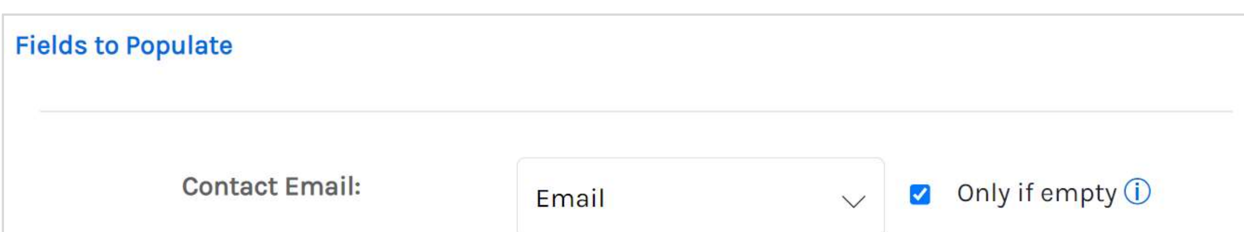
Select the fields that your organization uses to store key contact information. The application will use these fields to determine the email syntax for your Accounts. It will not modify them.



2. Fields to Populate:

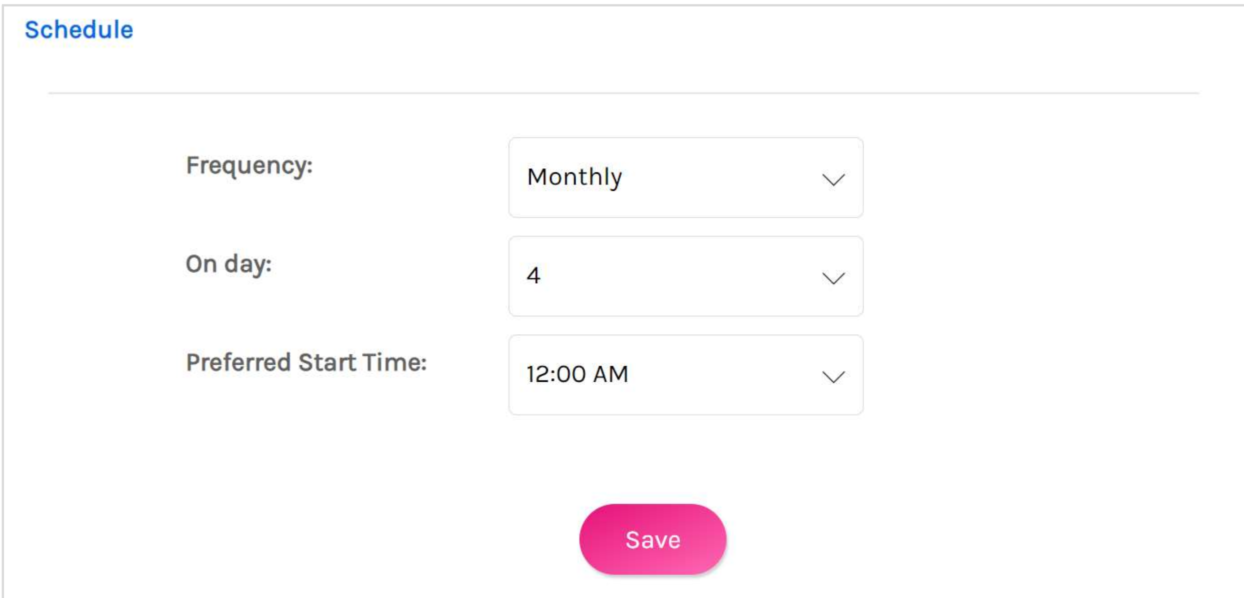
Select the Contact field that you want to populate with the email addresses that the application predicts.

Check the “Only if empty” box to only populate the selected field when it doesn’t have an existing value.



3. Schedule:

Choose when you want the Account email syntaxes to be calculated. Once a syntax exists for an Account, the app will try to identify Contact email addresses when created or updated.



Click **Save** and wait for the job to run.

Monitor the App

Once the first Account email syntax job is complete, there are a few things you can do to monitor the application and see your returns.

1. Add the Filast Email Syntax field to your Account page layout:

Filast Email Syntax (Filast__Filast_Email_Syntax__c) is the only custom field included in the application. It is an Account field that contains the results from the Account email syntax job. You can add this field to your page layout to see if the application was able to identify a syntax for a particular account.

A value for this field might look some like this: *first.last@abccompany.com*

If this field has a value, the app will try to identify email addresses for Contacts related to the Account when created or updated.

2. Create or update a Contact record:

Once an Account has the Filast Email Syntax field populated, the value is used to determine email addresses for Contact records when they are created or updated.

To test this functionality, create or update a Contact record on an Account that has a syntax.

3. Build a report:

You can also build an Accounts report with the Filast Email Syntax field to see how many Accounts the application found syntaxes for.

FAQs

What objects does the application support?

The application will currently only identify email addresses for Contact records.

When does the application modify Account records?

The application modifies Account records according to the schedule you specify on the Filast Settings page. On the Account object, the application only modifies the Filast Email Syntax field (Filast_Email_Syntax__c). This is a custom field that is created when the application is installed.

When does the application modify Contact records?

The application modifies Contact records before creation or update according to the settings you specify. The application will only modify a Contact record if the Account it is related to has an email syntax.

Where does the list of available fields come from on the Filast Settings page?

The 'Contact Email' lists contain all email fields on your Contact object. The 'Account Name' list contains all of your Account fields. The 'First Name' and 'Last Name' lists contain all of your Contact fields.

How does the application determine an Account's email syntax?

The application determines an Account's email syntax based on the most common syntax it observes among that Account's Contacts. If an account has too few Contacts or its Contacts syntaxes vary greatly, the application may not identify a syntax.

What if the email syntax changes for an Account?

When companies merge or rebrand, they may get new email syntaxes. The application evaluates email syntaxes for every Account record when the job is scheduled regardless of the Account already having a syntax populated.

What if my org has a validation rule to require the email field that I want the application to populate?

The application modifies records before validation rules are checked so you can create or update a Contact record and leave your email field blank. If the application can identify an email address for the Contact, the record will save successfully.

What time zone is the Account email syntax job schedule in?

The time selected follows your user's time zone.

Will the application schedule multiple jobs?

No. If you change the schedule, it will automatically delete the old job.

Where can I find the schedule I chose to run the Account email syntax job?

Once you save your selections on the Settings page, the schedule chosen will remain selected and visible for any subsequent page visits.