

CRM Guidance

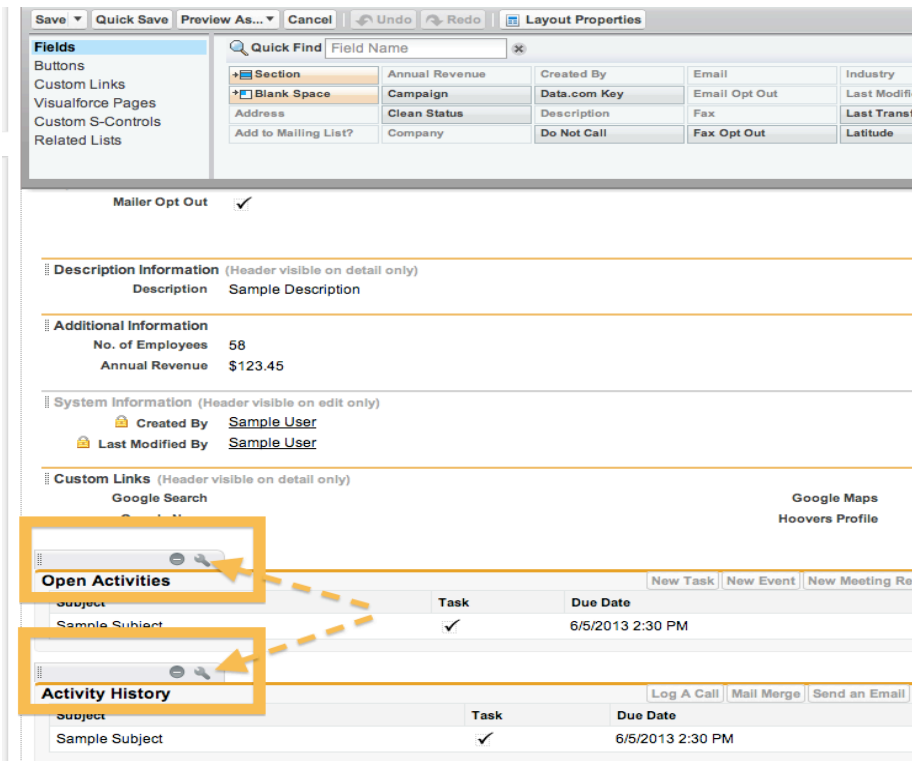
Email Attachments Set-up

For Standard Objects

Out of the box, Email Attachments provides 7 custom buttons that you can add to your Standard Object Page Layouts to get the “Email Attachments” functionality from either or all of these Objects. You can add any of these following standard objects button on Open Activity or Activity History related lists (or both) on respective object page layout.

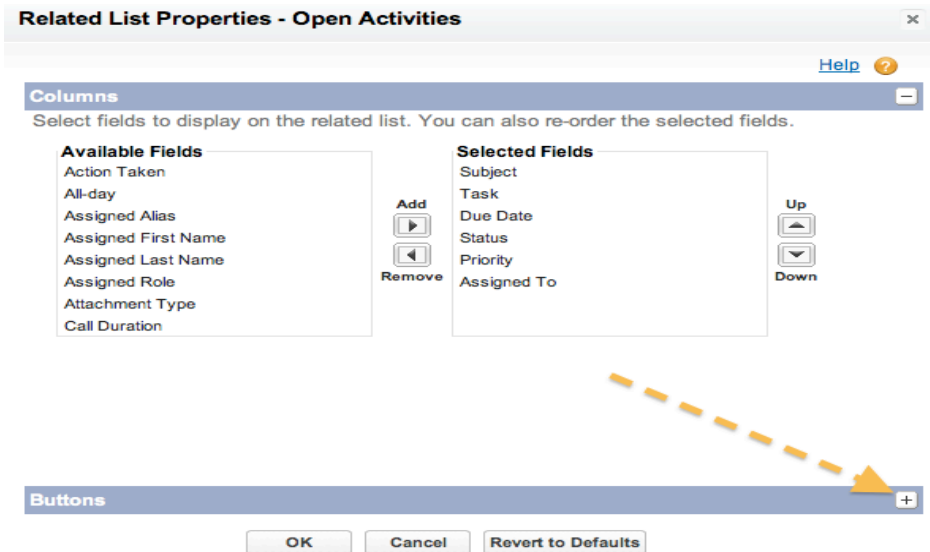
To add our custom buttons to your standard objects, follow these steps. These steps are for adding Email Attachments to your Leads Object ... You will repeat these exact same steps for the respective Page Layout and or Object for which you want to add Email Attachments:

Go to your name>>Setup>>App Setup>>Customize>>Leads> Page Layout>>Edit. Scroll down to the “Related List area., and go to “Activity History”, then click on the WRENCH, as shown in the image below:



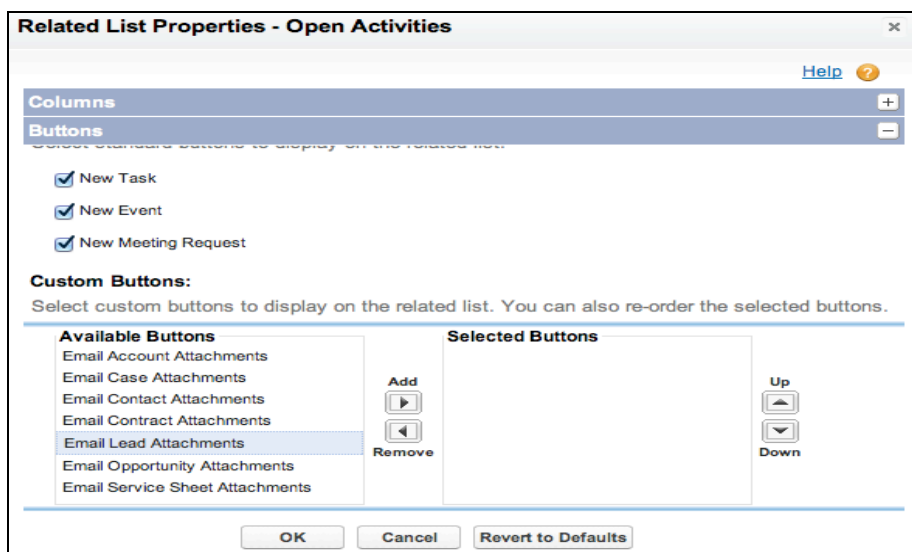
This will open the following dialog box, where you then need to click on the + sign, highlighted below:

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Now you should see this page. Here you will notice each of the 7 out-of-the-box Email Attachments that are included in our package, highlight “Email Lead Attachments”, then click on “Add” to insert this button to your layout:

1. Email Account Attachments
2. Email Case Attachments
3. Email Contact Attachments
4. Email Contract Attachments
5. Email Lead Attachments
6. Email Opportunity Attachments
7. Email Task Attachments



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Click on “OK”. You’re done with this Object. *Repeat for each Lead Page Layout and or Object, as desired.

For Custom Objects

You can add the Email Attachments functionality to any or all of your Custom Objects. And for each Custom Object you have two Options for your Page Layouts.

1. Option 1 is for Custom Objects that have a Lookup field to your Contacts Object. This Page Layouts will enable your Users to easily access the Contact list related to this Custom Object Your Related Contact Records will auto display the related email address in this page layout, making it simple to insert the email addresses.

To Deploy Option 1 Email Custom Object Attachments, go to “Your Name>>Setup>>App Setup>>Customize>>Activities>”Task Buttons and Links,” then click on “New” then copy and paste the following, only modifying the the red text with your custom object API Name: :

```
/apex/CRMG_EmailAtt__EmailCustomObjectAttachments?obj={CUSTOM_OBJECT_API_Name}&id=<CUSTOM_OBJECT_ID>
```

For Example if your Custom Object name is Customer Sheet and your API Names is “Custom_Object__c” , this is what your formula would look:

```
/apex/CRMG_EmailAtt__EmailAttachmentsWithContact?id={!Custom_Sheet__c.Id}&id={Project_Ti  
me__ID}
```

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The screenshot shows a 'Send Email' window with the following elements:

- Send Email** (Title)
- Send** and **Cancel** (Buttons)
- Email Fields** (Dropdown)
- Additional To** (Text input with search icon)
- To** (Text input)
- CC** (Text input)
- Attachment Type** (Dropdown menu showing 'Addendum')
- BCC Me** (Checkbox)
- Subject** (Text input)
- E-mail Body** (Rich text editor with toolbar)
- Added attachment** (Text)
- Activity Status** (Dropdown menu showing 'Completed')
- Send** and **Cancel** (Buttons)

- Option 2 for your Custom Objects that do NOT have a Lookup field to your Contacts Object. Users can still email from this object and choose from a other Contacts, Users, and or can add any email address to the Email Attachments mailer.

To Deploy Option 2 Email Custom Object Attachments, go to “Your Name>>Setup>>App Setup>>Customize>>Activities>”Task Buttons and Links,” then click on “New”. Name your button using this format “Email <Custom Object Name> Attachments”, Display Type = “List Button”, Behavior = “Display in existing window without sidebar or header”, Content Source = URL, then copy and paste the following code into the formula field ****modify your code by inserting the correct API Name of your Custom Object.**

For Example if your Custom Object name is Customer Sheet and your API Names is “Custom_Object__c” , this is what your formula would look:

```
/apex/CRMG_EmailAtt__EmailAttachmentsWithContact?id={!Service_Sheet__c.Id}
```

And this is what this formula will look like to your Users:

```
/apex/CRMG_EmailAtt__EmailCustomObjectAttachments?obj=Timesheet__c&id={!Timesheet__c.Id}  
}
```

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For Example if your Custom Object name is Customer Sheet and your API Names is “Custom_Object__c”, this is what your formula would look:

```
/apex/CRMG_EmailAtt__EmailAttachmentsWithContact?id={!Customer_Sheet__c.Id}
```

See image on the follow page to the page layout for this Option:

Send Email Send Cancel

To

Additional To

CC

Attachment Type **Contract**

BCC Me

Subject

E-mail Body

Added attachment Voluntary Cleanup Program_Service Sheet_VIEW.pdf

Activity Status **Completed**

Send Cancel