prezentor.^{2.0}

Salesforce. Setup extra fields for Prezentor mails

1. Click 'Settings'			
All 👻 🔍 Search Salesforce			ar 🖬 ? 🔯 🖡 🐻 📗
Contacts 🗸 Campaigns 🗸 Dashbo	oards 🗸 Reports 🗸 Chatter Groups 🗸	Calendar 🗸 People 🗸 Cases 🗸 Fo	recasts
AMBEC ARNS ALL ALLES ALL		Assistant	C ////25 ICC/ ANNU AMBER
	AS OF 100ay 09:18:13	New lead assigned to you today	
		> 📩 Bertha Boxer	X
		> Rew lead assigned to you today Jeff Glimpse	× ×
		> Rew lead assigned to you today Brenda Mcclure	× ×
nere to view your performance.		> Rew lead assigned to you today Carolyn Crenshaw	× ×
		> Rew lead assigned to you today	×
2. Click 'Service set	up'		
Q Search Setup	-		🔄 🗄 ? 🔯 🖡 🐻
			Service Setun
INGC INSTICCIUS	IT ASSING INNET THE SECTION	estilite xxXXX /////C /////Set	
			🤨 Setup :e 🔻
			Developer Console
			View All
		● Service Cloud Basics □ ²	
	-	See how Service Cloud can help you ke	ep your customers happy.
3. Click 'Object Ma	nager'		
	0		
<u> </u>		Q Search Setup	
Service Setup Home	e Object Manager 🗸		
Q Quick Find	SETUP Sorvice Setup Home	on Garaxin Andro Anys-	TU <i>ETTE</i> S (USEX ASSIDE 7000)
Service Setup Home	Service Setup Home		
ADMINISTRATION	Recommended Setup		
> Users	Recommended Setup		
> Channels			
> Omni-Channel			
PLATFORM TOOLS	20	D	
> Custom Code	Add You	r Users	Customize Case Stat
AUTOMATION	Add your team to Service Clou	ud in this simple setup flow.	Track and streamline your agent

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4. Click 'Email Message'

Contract	Contract
D&B Company	DandBCompany
Duplicate Record Item	DuplicateRecordItem
Duplicate Record Set	DuplicateRecordSet
Email Message	EmailMessage
Event	Event
Image	Image
Lead	Lead

5. Click 'Field & Relationships'

Details	Details	
Fields & Relationships	Description	
Buttons, Links, and Actions	API Name EmailMessage	
Compact Layouts	Custom	
5. Click 'New'	Custom Q Quick Find New Field Dependent	ndencie

7. Select 'Picklist'

Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and au
Phone	Allows users to enter any phone number. Automatically formats it as
O Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.

8. Click 'Next'

Next	Cancel

9. In input 'Field label' enter 'Prezentor_email_status' (without brackets)

Step 2. Enter the details
Field Label Prezentor_email_status i Values Use global picklist value set
10. Select radio button 'Enter values, with each value separated by a new line'
Values Use global picklist value set
Enter values, with each value separated by a new line
11. In field 'Values' enter text:
sent
delivered
not delivered
clicked
opened
dropped
bounced
 Enter values, with each value separated by a new line
sent
sending delivered
not delivered
opened

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12. Click 'Next'

Previous	Next	Cancel

13. Click again 'Next'

	Step 3 of 4		
Previous	Next	Cancel	
		1	

14. Click 'Save & New'

Step 4 of 4
Previous Save & New Save Cancel

15. Select 'URL' (on page 'Field & Relationships')

U lext	nere aces to enter any complication of letters and nembers.
◯ Text Area	Allows users to enter up to 255 characters on separate lines.
O Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in en
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", an
O URL	Allows users to enter any valid website address. When users click on the field, the

16. Click 'Next'

	Next

17. In input 'Field label' enter 'Prezentor_report_email_url' (without brackets)

Custom Field Definition Edit			Change Field Type	Save	Cancel
Field Information					
	Field Label Preze	ntor_report_email_			
	Field Name Preze	ntor_report_email_			
	Description				
	Help Text				



18. Click 'Next'

-		-
Previous	Next	Cancel

19. Click again 'Next'

	Step 3 of 4				
	Previous Next Cancel				
20. Click 'Save'					
	Previous Save & New Save Cancel				

21. In Prezentor's backend or application click 'Sync with CRM' and wait sync

User profile	Access rights	Email templates	Email settings	Agenda templates	Presentations	Integration
Select CRM Provider			Select trai	hslation agency	D Ire	
CRM data			Translatio Please typ	Translation login Please type in your translation credentials		
Login			Username:	hs@wmt.dk		
 Enable synchronization 	on with CRM		Password:			
Sync exists emails and	meetings to CRM		Process cod	e:		
Sync CRM data	6-2019 14:27					
					Cance	l Save