

1

Click on the profile icon in the upper right.

The screenshot shows a Salesforce dashboard interface. At the top, there is a header bar with the text "Sandbox: SFTRAIN2 | [Log out](#)". Below this is a navigation bar containing a search box labeled "Search...", a star icon, a plus icon, a shield icon, a question mark icon, a gear icon, a bell icon, and a profile icon circled in orange. The profile icon is a cartoon character with a blue background. Below the navigation bar is a menu with items: "Sales Lens", "Virtual Envelope", "Leads", "Contacts", "Accounts", "Tasks", "Quotes", "More", and a "View profile" button. The main content area is divided into several sections. On the left, there is a "Home Dash..." section with a "+ Follow" button, "Open" and "Refresh" buttons, and a dropdown arrow. Below this are three cards: "Quotes in Client Action", "Quotes Waiting for Pending Rep Action", and "Activities Created Tasks + Events - Leads". Each card has a large green "0" and a "View Report" link. On the right, there are four dashboard tiles: "Salesforce Billing Commissions", "Chargent Rep", "Franchise Support Cases: Reps", and "Activity Tracker Calls and Appointments". Each tile has a "View Dashboard" link.

2

Click "Settings"

The screenshot displays a Salesforce user interface. At the top, the text "Sandbox: SFTRAIN2 | Log out" is visible. Below this is a search bar and a navigation bar with tabs for "Sales Lens", "Virtual Envelope", "Leads", "Contacts", and "Accounts". A user profile dropdown menu is open, showing the user's name "Jennifer Geib" and the profile picture. The "Settings" link is highlighted with an orange circle. Other options in the menu include "Log Out", "USERNAMES", "DISPLAY DENSITY", "Options", "Switch to Salesforce Classic", and "Add Username". The background shows a dashboard with several widgets, including "Client Action", "Quotes Waiting for Pending Rep Action", and "Activities Created Tasks + Events - Leads".

3

From the left navigation bar, scroll down and click "Email".

The screenshot displays a user profile page. On the left, a navigation menu lists various settings, with 'Email' highlighted by an orange circle. The main content area is titled 'Personal Information' and contains a 'Details' section with the following fields:

Details	
First Name	<input type="text" value="Jennifer"/>
Last Name	<input type="text" value="Geib"/>
Alias	<input type="text" value="JGeib"/>
Email	<input type="text" value="jennifer.geib@clippermagaz"/>
Username	jennifer.geib@clippermagazine.com.sftrain2
Nickname	<input type="text" value="JGeib"/> i
Phone	<input type="text" value="(717) 663-3183"/>
Extension	<input type="text"/>
Fax	<input type="text"/>
Mobile	<input type="text"/>
	Example: +1 5035550123 i

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Click "My Email to Salesforce"

The screenshot shows the Salesforce user profile settings interface. On the left is a navigation menu with the following items: Change My Password, Connections, External Credentials, Grant Account Login Access, Language & Time Zone, Login History, Personal Information (highlighted in light blue), Reset My Security Token, > Display & Layout, < Email, My Email Settings, My Email to Salesforce (circled in orange), and My Unresolved Items. The main content area is titled 'Personal Information' and contains a 'Details' section with the following fields: First Name (Jennifer), Last Name (Geib), Alias (JGeib), Email (jennifer.geib@clippermagaz), Username (jennifer.geib@clippermagazine.com.sftrain2), Nickname (JGeib), Phone ((717) 663-3183), Extension, Fax, and Mobile. An example phone number '+1 5035550123' is shown below the Mobile field. At the bottom of the page, a navigation bar contains several icons and labels: Rece..., ? Help and..., ★ Daily Dashboards..., ★ Daily Li..., ⚡ CPQ He..., ⚡ Payment H..., ⚡ Salesforce ..., and a wallet icon Sa.

5

In the "My Acceptable Email Addresses" box, add any email addresses (@cmag, @clippermagazine, @valpak, etc.) that you may possibly be sending emails from.

Sandbox: SFTRAIN2 | [Log out](#)

valpak / Clipper

Search...

Franchise Sales Home Sales Lens Virtual Envelope Leads Contacts Accounts Tasks

- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- External Credentials
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token

My Email to Salesforce

Enter the Email to Salesforce address in the BCC line of emails that you want to add to the activity history automatically generated email address.

Email to Salesforce Address emailtosalesforce@2607yd85ggotkgfkum189wsslspte6ihbdbyjjuwl6vmcqucj4.0:22g0pmaq.usa258s.le.sandbox.salesforce.com

My Acceptable Email Addresses

Enter all email addresses that you use to email leads and contacts, separated by commas. Only emails specified below can be added to the activity history of related records.

My Acceptable Email Addresses

6

Adjust settings for your desired outcomes.

The screenshot displays the Valpak Clipper user interface. At the top right, it shows 'Sandbox: SFTRAIN2 | Log out'. The Valpak Clipper logo is on the left, followed by a search bar. A navigation menu includes 'Franchise Sales', 'Home', 'Sales Lens', 'Virtual Envelope', 'Leads', 'Contacts', 'Accounts', 'Tasks', and 'Qu'. A left-hand sidebar lists various settings: Approver Settings, Authentication Settings for External Systems, Change My Password, Connections, External Credentials, Grant Account Login Access, Language & Time Zone, Login History, Personal Information, and Reset My Security Token. The main content area is titled 'My Email to Salesforce' and contains the following settings:

When emails are sent to salesforce.com:

- Always send them to [My Unresolved Items](#) i **New!**
- Automatically assign them to related salesforce.com records

Under the second option, there are three checked checkboxes:

- Opportunities Email is associated with all of the contact's open opportu
- Leads
- Contacts

Below these, a section titled 'If duplicate records are found, associate email with:' has three radio button options:

- All records
- The oldest record
- The record with the most activity

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Once you have selected your desired settings, ensure that you save your changes.

The screenshot displays the Valpak Clipper user interface. At the top, the header includes the Valpak Clipper logo, a search bar, and user information: "Sandbox: SFTRAIN2 | Log out". The main navigation bar contains "Franchise Sales" and several menu items: Home, Sales Lens, Virtual Envelope, Leads, Contacts, Accounts, Tasks, Quotes, and More. A left-hand sidebar lists various settings categories, with "My Email to Salesforce" selected and highlighted in blue. The main content area is titled "My Email to Salesforce" and contains the following settings:

- Opportunities: Email is associated with all of the contact's open opportunities
- Leads
- Contacts
- If duplicate records are found, associate email with:
 - All records
 - The oldest record
 - The record with the most activity
- If no matching records are found, create a task for each recipient and send it to My Unresolved Items
- Always save email attachments
- Email me confirmation of association

Below these settings is a text input field for "Excluded Domains" with the instruction: "Enter the email domains you don't want to associate, separated by commas." A placeholder text below the field reads: "Add my domain (clippermagazine.com) to the list of excluded domains." At the bottom of the settings panel are "Save" and "Cancel" buttons.

8

Copy the link that is provided. Make sure to copy everything after "Your Email to Salesforce address:".

My Email to Salesforce

If you use a company-provided or third-party email address, use Email to Salesforce to save emails as activities on lead, contact, opportunity, and other records in salesforce.com.

1. Send your email from an email address specified in My Acceptable Email Addresses.
2. Blind carbon copy (BCC) the "Email to Salesforce address" when you send an email that you want added to the activity history of a salesforce.com record.

Your Email to Salesforce address: emailtosalesforce@2607yd85gggkqfkum189wsslsp6ihbdbbyijuw6vmcqucj4.o3-22g0pmaq.usa258s.le.sandbox.salesforce.com

My Email to Salesforce

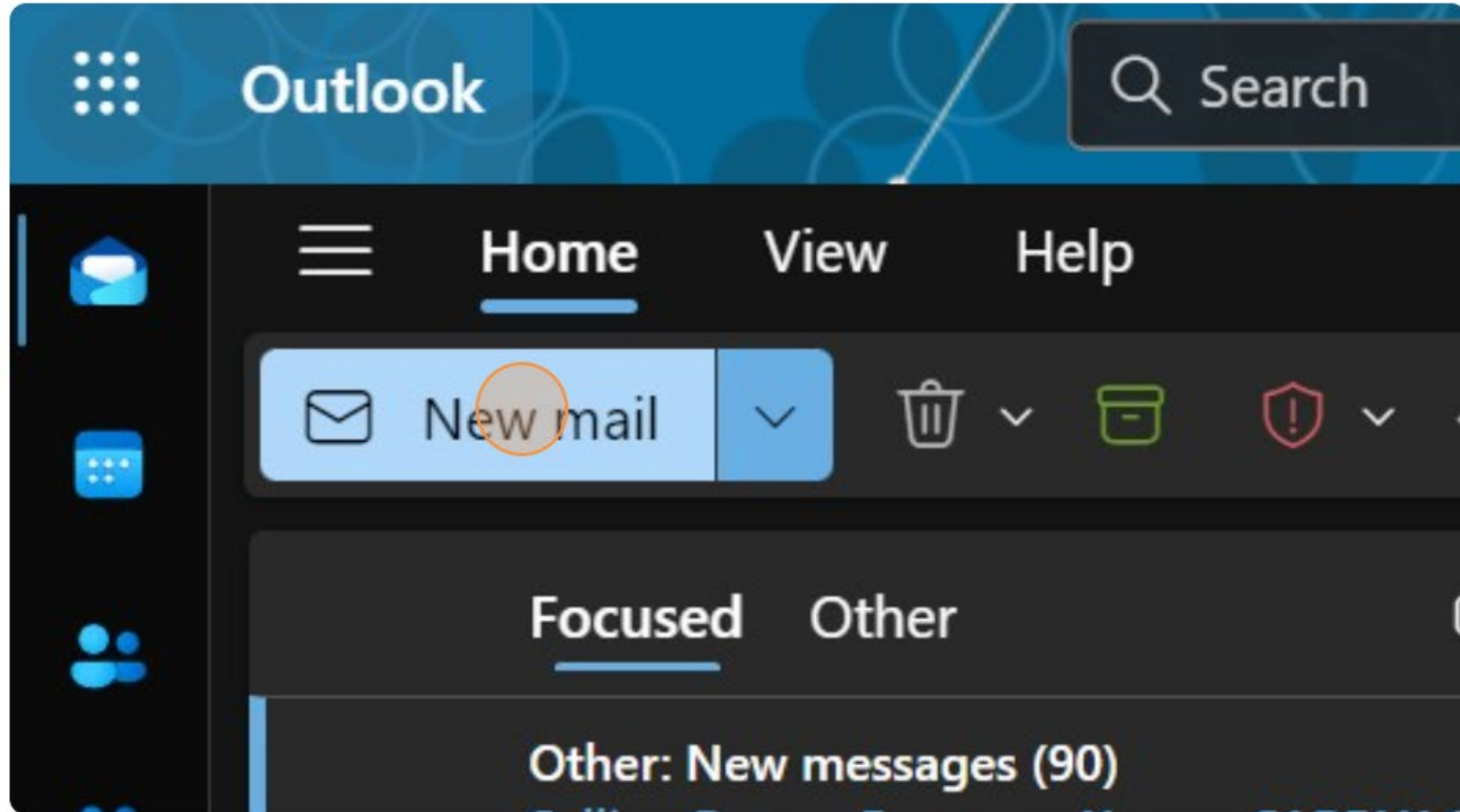
Enter the Email to Salesforce address in the BCC line of emails that you want to add to the activity history of related records. This is an automatically generated email address.

Email to Salesforce Address	emailtosalesforce@2607yd85gggkqfkum189wsslsp6ihbdbbyijuw6vmcqucj4.o3-22g0pmaq.usa258s.le.sandbox.salesforce.com
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l... ★ Daily Dashboards... ★ Daily Li... ⚡ CPQ He... ⚡ Payment H... ⚡ Salesforce ... 📁 Sale... 📄 Recent Enha...

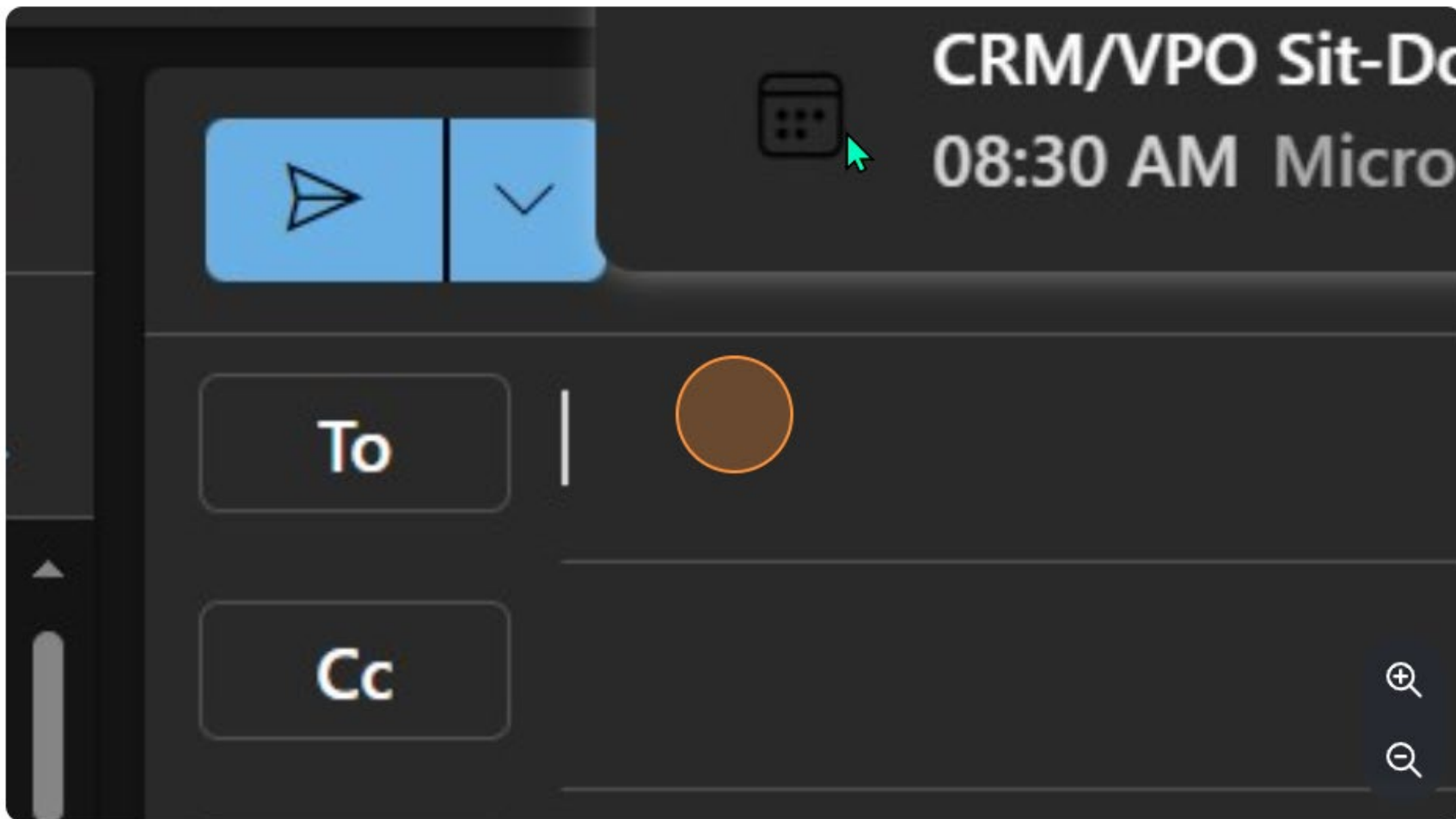
9

Compose a "New mail".



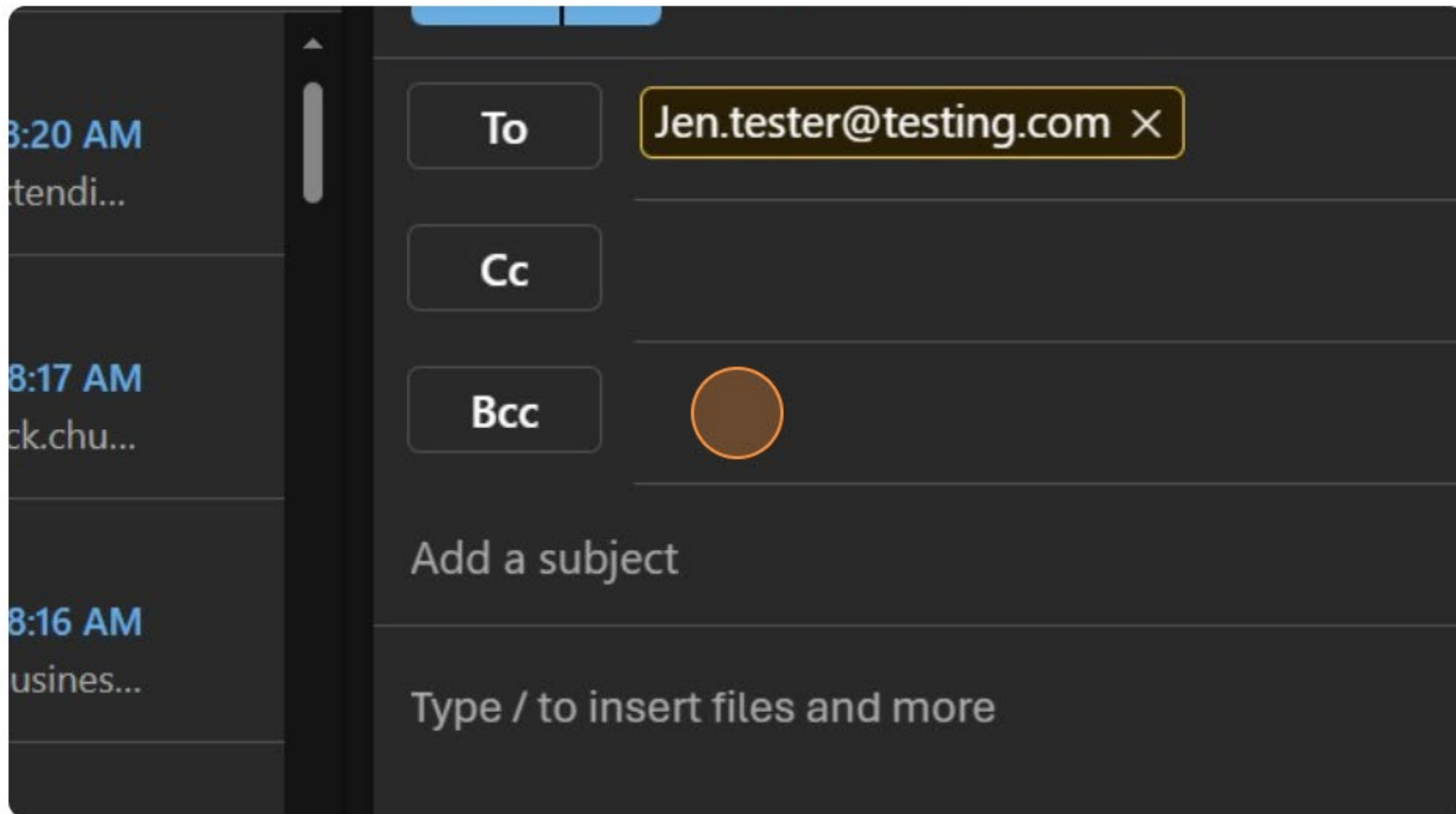
10

Enter the contact/business email address as it appears in Salesforce in the "To" field. The email address must exist in Salesforce in order for this feature to work.

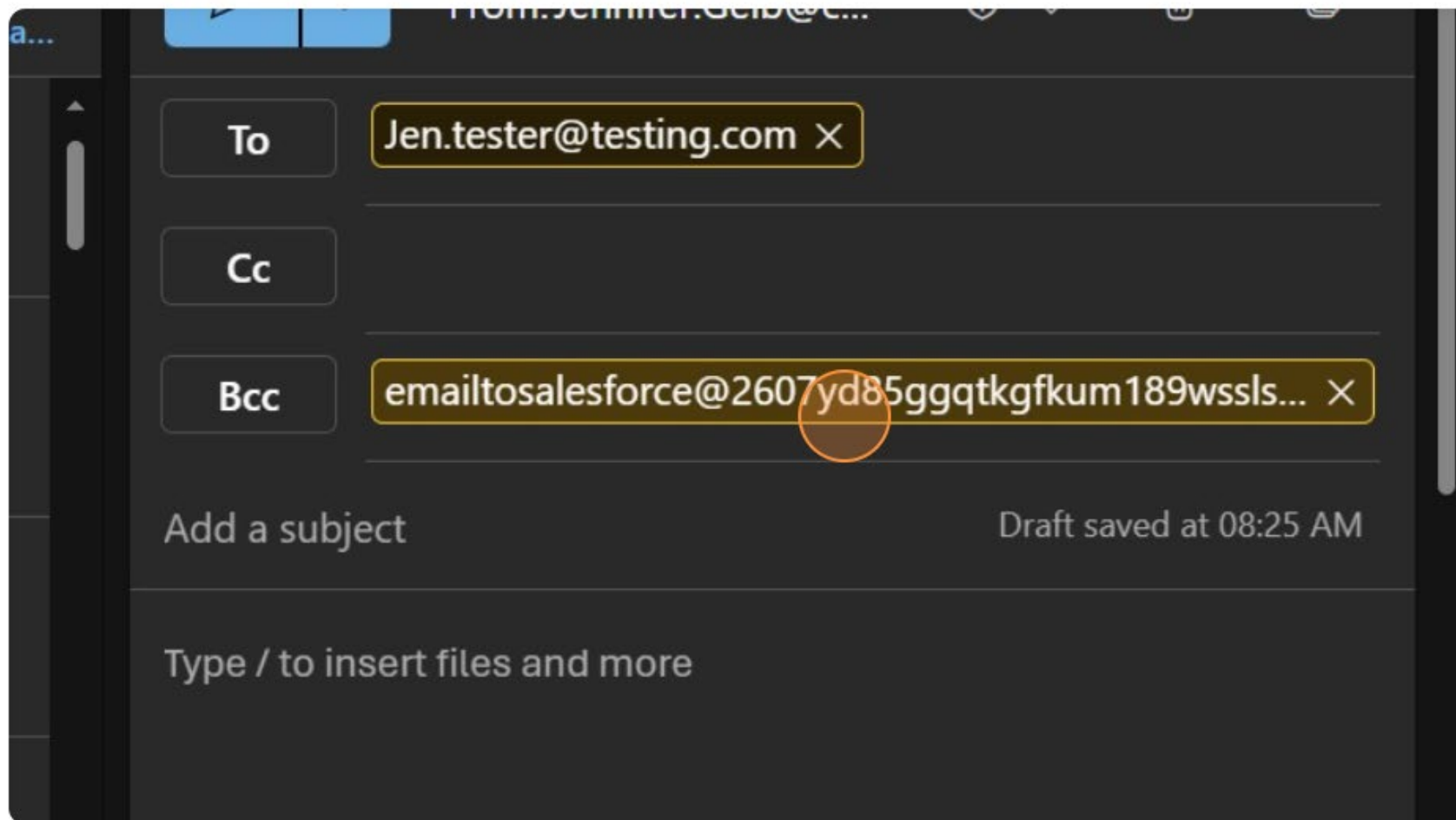


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In the "Bcc" line, paste the "Salesforce to Email address" that you copied previously. This address is unique for each user and must be added in the Bcc line in order for Salesforce to capture the email activity.



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Once your email is sent, the email activity will be documented on the record(s) that you selected in the settings options that are associated with this email account.

Need additional help?
Email FAST@Valpak.com