

Content Organizer

Installation Guide

Welcome to Content Organizer. Please follow this guide to complete the installation process.

- Step 1: Visit the [Salesforce AppExchange](#) and select the "Get It Now" button to begin the installation process
- Step 2: Select for installation to Production or Sandbox
- Step 3: Select the correct permission group that will be granted access to Content Organizer
- Step 4: Install the application and wait to receive notification of a installation success
- Step 5: Once installation is complete - Select the "Execute Batch" button. This is a one-time process to catalog your organizations settings.
- Step 6: Visit the Content Organizer tab to ensure the Libraries and Content are displaying properly
- Step 7: Select the "Setting" button on the upper right and ensure that the Custom Fields (Filters) are shown are properly displayed to match any Record Types you might have.
- Step 8: Go through the rest of the Settings to configure Content Organizer
- Step 9: To enable Folders on a Library, ensure you select "Activate Folders" on the red Library icon in the "Search Results" section
- Step 10: Users may configure their own Settings once they are granted access to the Content Organizer tab

Best Practices

- ▶ You may Email one or many pieces of Content or Chatter Files. Up to 3MB at a time
- ▶ Enable Content Deliveries before install
- ▶ Video formats
 - ▶ Windows
 - ▶ IE - .MP3, .AVI
 - ▶ Chrome - .MP3, .MPEG4, .MOV
 - ▶ Apple Mac
 - ▶ Chrome - .MP3, .MPEG4, .MOV

Links

- [Salesforce AppExchange](#)
- [Content Organizer Support Blog](#)

Free Trial

A free Trial is available from the AppExchange

For more information or to schedule a demo please call: 908-376-9773 OR visit our [website](#) for more information