Content Organizer

Installation Steps

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
Note: The package comes with a Content Organizer Standard User permission set to quickly assign to non admin users.

Step 4:   Install the application and wait to receive notification of a installation success

Step 5:   Visit the Content Organizer application to ensure the Libraries and Files are displaying properly

Step 6:   Visit the Content Organizer Classic application to ensure the Libraries and Files are displaying properly

Step 7:   Select the "Custom Buttons" or in Classic the "Settings" button on the upper right and ensure that the Custom Buttons (Actions per Profile) and Custom Fields (Classic Only) are shown to properly match any ContentVersion Record Types you might have.

Step 8:   Users may configure their own Settings (Classic Only) once they are granted access to the Content Organizer tab

Step 9:   To assign additional users access to the "Custom Buttons" screen - Salesforce Setup > Custom Settings > Create record for Profiles for the "CO_ProfilesToAccessSettings" setting.

Step 10:   To modify the email template - Salesforce Setup > Email Templates > "ContentOrganizerTemplate"

Best Practices

‣ You should already have My Domain setup and deployed
‣ You may Email one or many pieces of Content or Chatter Files. Up to 3MB at a time
‣ Enable Content Deliveries before install
‣ Supported Video & Audio formats
    ‣ MPEG4, MP4, MP3

Links

Salesforce AppExchange
Content Organizer Support Blog

Free Trial

A free Trial is available from the AppExchange allows for 2 users for 2 days. You must cancel through the AppExchange in order to avoid being charged.

For more information or to schedule a demo please call: 908-376-9773 or visit our website for more information