

S3-Link Email Files Setup

Here are the steps to enable related files and recipients in Email Files UI.

1. Go to S3-Link Administration > Email Files Configuration
2. Set “Type”. Select object from dropdown whose related files you want attach in email



▼ Type ⓘ

Type

Account ▼

3. Go to “Recipients Configuration” section. From here you can enable any child object records (user, contact and lead) as recipient of the emails. Suppose while sending files related to account record, if you want to enable all account’s contacts as recipient, you can set configuration as below. Similarly, while sending files related to the case, it will auto enable user, contact or lead of that case as recipient if “Use Related Users as Recipients” is true.



▼ Recipients Configuration

Related Recipient Object API (Lookup) ⓘ	Related Recipient Object API (Junction) ⓘ
Contact	
Parent Field API Name ⓘ	Recipient Field API Name ⓘ
AccountId	
Use Related Users as Recipients ⓘ	
<input checked="" type="checkbox"/>	

4. Go to “Email Template Configuration” section. Select all the Salesforce classic templates you want to enable to send files related to selected “Type”. You can also set which template to be used as default template if there are multiple email templates. FYI: It will show only those email

template in the list which has “S3” in the email template name.

▼ Email Template Configuration

i You can use email templates whose name contains "S3" in it.

Available Allowed Email Templates		Selected Allowed Email Templates
S3-Link Test For Account	▶	S3-Link Default Email Files Te
	◀	

Default Email Template *i*

S3-Link Default Email Files Template ▼

5. Go to “Other Settings” section and set configuration as below

▼ Other Settings

Use Email Signature? <i>i</i>	<input checked="" type="checkbox"/>	Email All Related Files <i>i</i>	<input checked="" type="checkbox"/>
Content Type <i>i</i>	LINK ▼	Allow Emails without Files? <i>i</i>	<input checked="" type="checkbox"/>
Save as Salesforce Activity? <i>i</i>	<input checked="" type="checkbox"/>	Disable Auto Search for Files <i>i</i>	<input checked="" type="checkbox"/>

6. Click “Save”

Follow the same steps for other object types like contact, opportunity, leads etc.