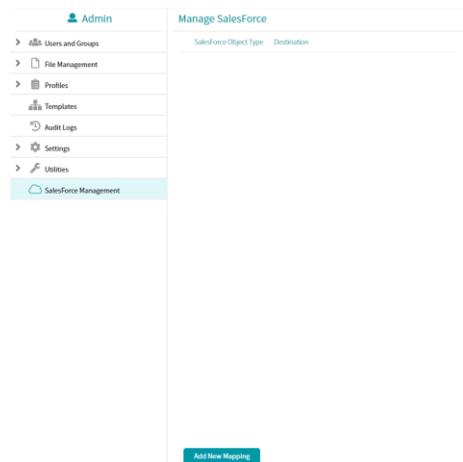# Rubex Salesforce Integration

Section 1: Preparing eFileCabinet with Salesforce Mappings

In your eFileCabinet account go to **Admin** > **Salesforce Management**

There you will see an option at the bottom to add a new mapping.

The mapping that is defined here is to help eFileCabinet know how you want Salesforce items linked. This linking happens by a combination of the Salesforce Object type, and the Salesforce Field Name. As an example, I can setup a mapping to happen for Accounts and use the AccountNumber field name. At this stage, you also define where you want the file structure to be created at in your eFileCabinet account.

A few things to remember:

You will be using the Salesforce Field name, not the label that is used in the Salesforce view, i.e. in the Account record I see a field of *Account Number*, but for the integration to work I need to refer to the field as *AccountNumber*. Otherwise I'll get errors as eFileCabinet attempts to find an Account field name that doesn't exist.
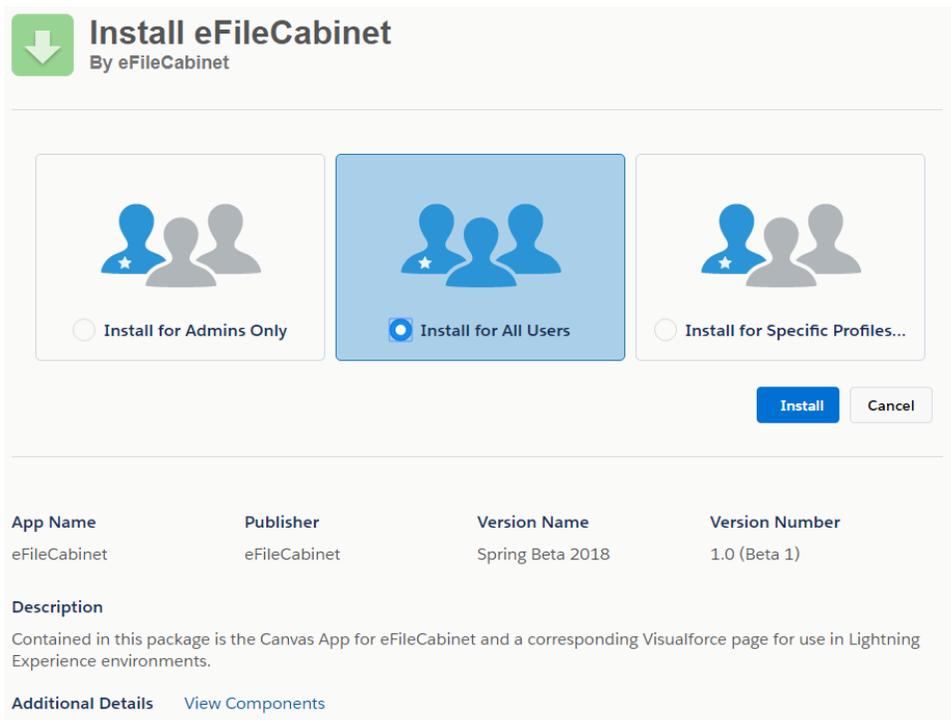
The Grant access type will grant users in eFileCabinet to at least have those permissions to the area that the mappings are provisioned with. That means, if a user in eFileCabinet only has read rights to the cabinet that Salesforce is referencing, and if the Mapping grants Read, Write, Delete permissions, the eFileCabinet user will have their read rights elevated while they are accessing files in the directory that the mapping is linked to.

Section 2: Installing the eFileCabinet Canvas app in Salesforce

If installing in sandbox use this link.

If installing in production use this link.

Select the appropriate level to install the Canvas app, either only Admins, All Users, or for Specific Profiles.

Section 3a: Enabling the integration in Lightning

To make the integration visible in Lightning, it'll take a few steps.

1. Launch the Lightning App Builder and click on the New button

2. Select *Record Page* and click **Next**.

3. Give the new page a label. Select the object type that matches the mapping that you setup in section 1. Then click **Next**.
   If you have multiple mappings configured, i.e. one for Accounts and another for Leads, then you'll need to create a custom lightning page for each mapping you have defined.

   Create a New Lightning Page

   * Label

   Account - EFC Integration

   * Object

   Account

   Back   Next

4. You can select a page template or choose to clone an existing default page, for this tutorial we are copying the existing *Account Record Page Default*. Then click **Next**.

   Create a New Lightning Page
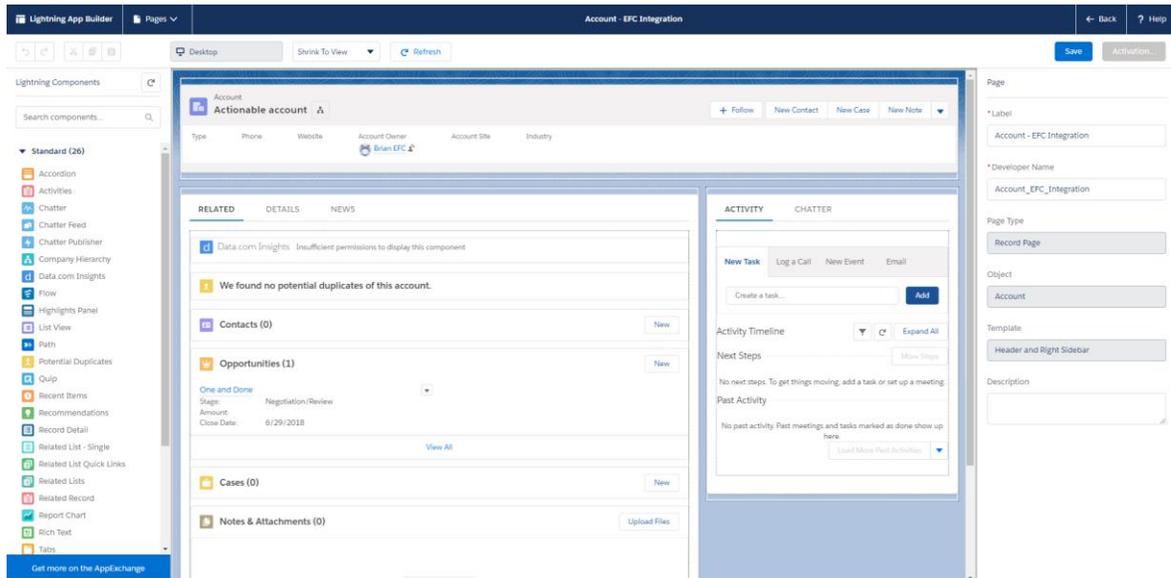
   CHOOSE PAGE TEMPLATE   CLONE SALESFORCE DEFAULT PAGE

   Account Record Page Default

   Account Record Page for Lightning Console

   Standard record page template that includes a header area with Highlights Panel, a main area with Record Detail and Related Lists, and a sidebar with Activities and Chatter.

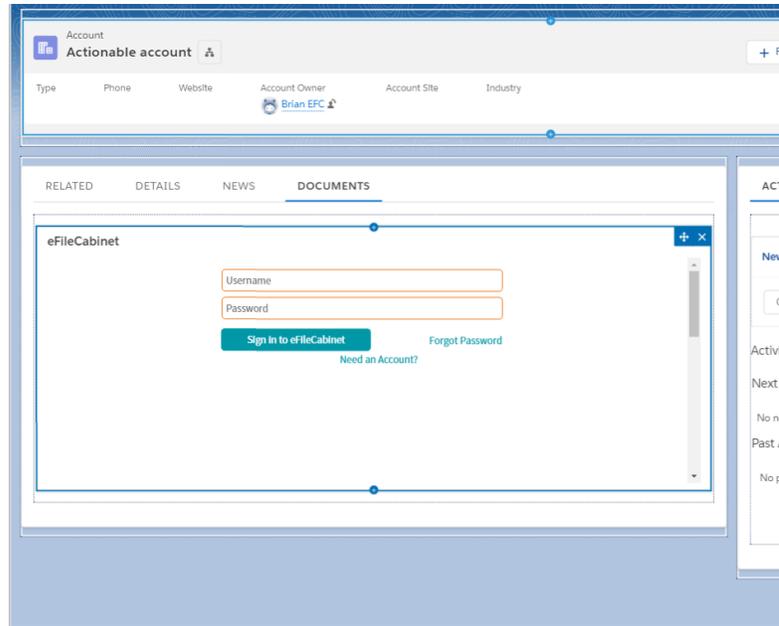   Back   Finish

5. The Lightning App builder gives you options on how to modify the cloned Account Record Page. The *Standard Component* section on the left side has a *Visualforce* element. This can be dragged onto the page template wherever makes sense for your organization's use of Salesforce.
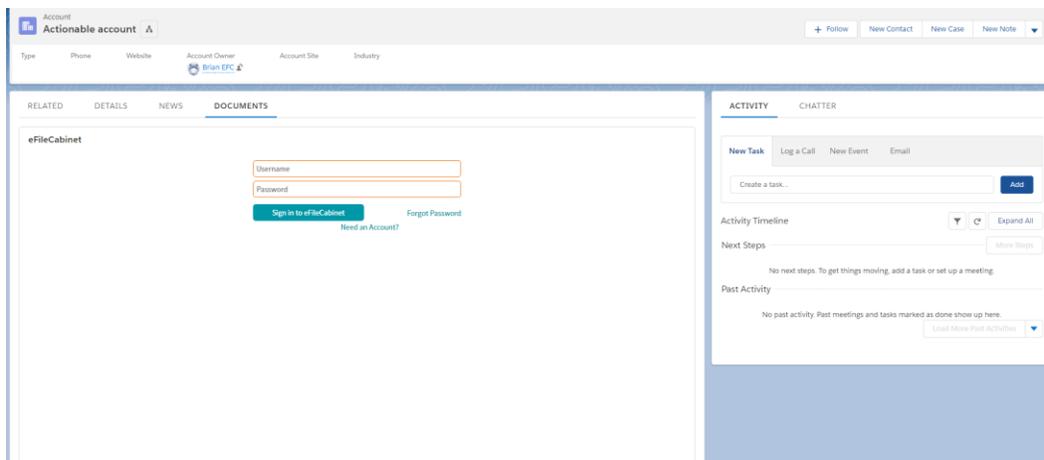

6. As a placement example you can add a new tab to the large left pane and call it something like Documents and then drag the Visualforce element into that new tab.

   If you set the height of the Visualforce Component to 610 pixels then you shouldn't see a scroll bar when interacting with the eFileCabinet element.

7. Once you have the page layout as you'd like, save the template and activate it for those who should be seeing the eFileCabinet integration.

Now that the new Account page has been created and activated, if you check out an Account record you can click on the Documents tab and see the login prompt for eFileCabinet. Once you log in, if a matching record exists in eFileCabinet then you'll see the linked files. If there isn't any structure for the Salesforce Account Record, new structure will be created automatically in eFileCabinet. At this point files can be added through the Salesforce integration into eFileCabinet, or files can be added into eFileCabinet and the Salesforce view will update to reflect the change.

Section 3b: Enabling access in Classic View

To get the eFileCabinet Integration to show up in the Salesforce Classic view, you need to access the view that you'd like to modify. Once you are in the view in edit mode, you can drag the Visualforce component into the section of the view that you would prefer to see the integration at.