1.How do I set up Recommended Content on my Salesforce account?

Configuring the content recommendations module helps the Sales teams always have high-performing content recommended to them for every opportunity.

This helps the sales team use the most updated and relatable content recommended by Paperflite.

In this article, you’ll learn how to:

Setup Custom fields on Salesforce

Bringing custom fields from Salesforce to Paperflite

Setting up the Recommended content on Salesforce

#### **Setting up Custom Fields on Salesforce**

To set up recommended content, you need to set up the custom fields to begin with.

Go to the "**Gear**" icon on the top and click “**Setup**”. You’re now taken to the Setup tab on Salesforce.

Next, head to the "**Quick Find**" section on the left menu bar and search for **Object Manager**.

Once you’re in the Object Manager window, navigate to “**Opportunity**”.

Under Opportunity, go to **Fields & Relationships** and click on **New.**

Upon clicking on New, the next screen is where you choose the data type. Scroll down to choose from **Picklist** or **Picklist** (multi-select) only. Click on **Next** once selected.

Fill in the **Field Label** and **Field** **Value** details. After filling in the details, click on **Next**.

1. Accessing Seek on Slack

Seek is Paperflite’s AI-powered LLM processing solution that helps revenue teams discover and utilize information from your organization’s content library and move sales conversations forward

And now, we’re bringing Seek to your Slack channels to ensure you have faster access to information you need within your workflows.

Now when a prospect asks you how you’re different from your competitors, you don’t have to go scouring through your battlecards. Just Seek on Slack!

This guide walks you through integrating Seek within Slack and access information from within your content on Slack.

Here are the steps involved:

Integrating Slack into your Paperflite account.

Using Seek on Slack

**Step 1: Integrating Slack into your Paperflite account.**

Head to app.paperflite.com and log into your Paperflite account using your credentials.

Now, navigate to Settings and then head to Integrations. Under the Notifications tab, you should be able to see Slack.

Next, go to the Slack tile and click on Activate

Authenticate the Slack Integration.

After authenticating, it will take you to the Slack permissions window. Read through the permissions and select allow.

You’ve now successfully integrated Paperflite with Slack. A world of opportunities has now been made available to you; you’ve been warned!

**Step 2: Using Seek on the Slack Application**

Seek can be accessed in different channels and/or in Direct Messages (DMs) and will be available in a thread view right within the chat window.

To Launch Seek, type the slash command (/) seek or **/seek** followed by a query.

Seek will process your question and provide you with relevant information or search results within Slack.

You can also have follow-up conversations with Seek by replying to its messages in the thread view of Slack.

**Information Retrieval and Access**

Once you’ve asked your query, here’s what the responses will look like:

A detailed text-based response to your query

Who posted the query (in case of using Seek in a Slack channel)

Links to relevant assets on Paperflite attached

An upvote/downvote button at the bottom of the response

1. Salesforce - the ability to restrict sending emails via Paperflite

Paperflite’s integration with Salesforce allows users to efficiently manage and share content with their contacts. To enhance control over communication, you can configure Email-sharing restrictions within the Paperflite platform for your Salesforce contacts. This ensures that sensitive or restricted contacts are not included in your email campaigns or communications.

This support article guides you through the steps to seamlessly configure Email-sharing restrictions within the Paperflite platform for your Salesforce contacts effectively.

Step 1: Configure Salesforce Field Accessibility

Login to Salesforce, click on **Object Manager,** and scroll down to select **Contact.**

Under Contact, navigate to **Fields & Relationships** and scroll down to select the Do Not Call field.

Click on **View Field Accessibility** within the Do Not Call field and customize Field Access to your choice.

Open the Salesforce **Sales Console** and navigate to **Contacts.** You will find a new Field column named **Do Not Call**.