

Upgrading the Salesforce eFax Connector

Salesforce supports upgrades for managed packages only. Version 1.5.1 of the Salesforce eFax Connector offers improvements such as automatically fetching sent fax status and received faxes, auto refresh sent and received fax tabs and automatically download fax images. Before you upgrade, familiarize yourself with the changes from v1.1.1 to v1.5.1.

Supported Editions

The Salesforce eFax Connector is available in the following Salesforce editions:

- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer Editions

User Permissions Needed

To upload packages:	Upload AppExchange Packages
To install and uninstall packages:	Download AppExchange Packages

New Features

1. Introduced automated fax image download option on received faxes. This feature can be enabled in Admin settings at batch start.
2. Introduced size limitation selection for fax image downloads in Admin setting for both manual and automated fax downloads. This feature can be enabled by selecting options from Admin settings.
3. Removed **Modify/Add a Fax Button** functionality from Admin settings.
4. Introduced interval for batch processing by one minute to avoid socket exceptions from server with continuous API calls.
5. Introduced ability to retrieve faxes for unassigned fax lines on active eFax account.
6. Introduced ability to auto refresh sent and received fax tabs.

Important Considerations

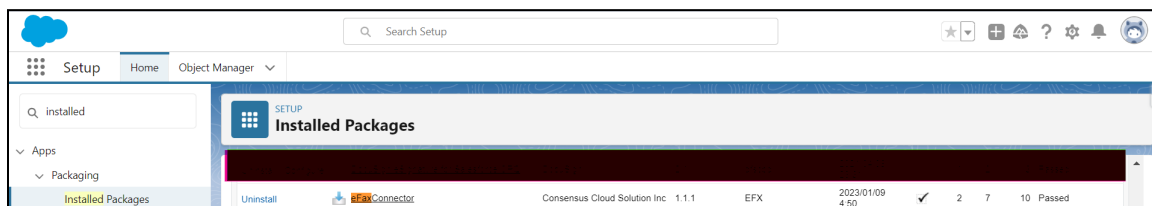
- Upgrading the eFax Connector makes permanent changes. Carefully read these considerations before starting the upgrade process.
- The upgrade is **NOT** reversible. After you confirm the upgrade, you can't revert to the previous version.
- Before upgrading, make sure that your current eFax Connector is connected to the correct eFax account. If you are connected in a sandbox, you will have to redo the integration in your production org.
- Connector v1.5.1 inherits your v1.1.1 connector settings.?

What to Expect During and After the Connector Upgrade

- During the upgrade process, the eFax Connector's data sync might be paused, and the App is Deactivated or Batch is stopped in the Configure eFax Account Admin Settings.
- When the upgrade is complete, the eFax Connector's Current Integration Status is set to a green checkmark, and the user who initiated the upgrade receives an email notification.

Installers of a managed package can then install the upgrade as follows:

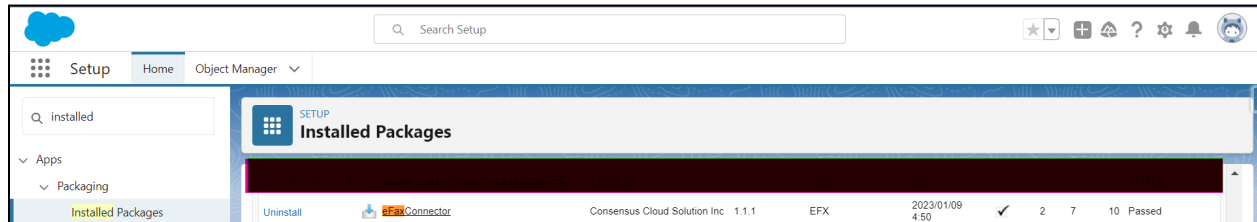
- Before you install an upgrade, determine if the app you installed was from a managed package.
- Look for the  **Managed - Installed** icon on the detail pages for each component and on the list of packages installed.



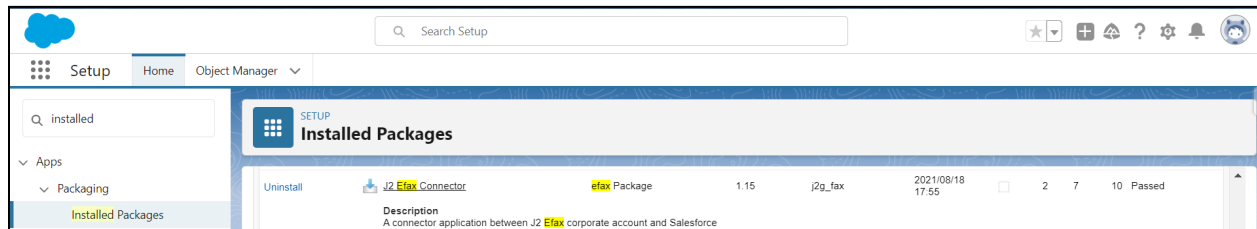
- Then, install the upgrade in the same way you would install any other package from the AppExchange.

Steps to Upgrade Managed Package in Your Org Using a URL

Please ensure that you have already installed version 1.1.1 of the eFax Connector package in your production/sandbox Salesforce org.



With this upgrade you will be installing version 1.5.1 of the eFax Connector package in your production/sandbox Salesforce org.

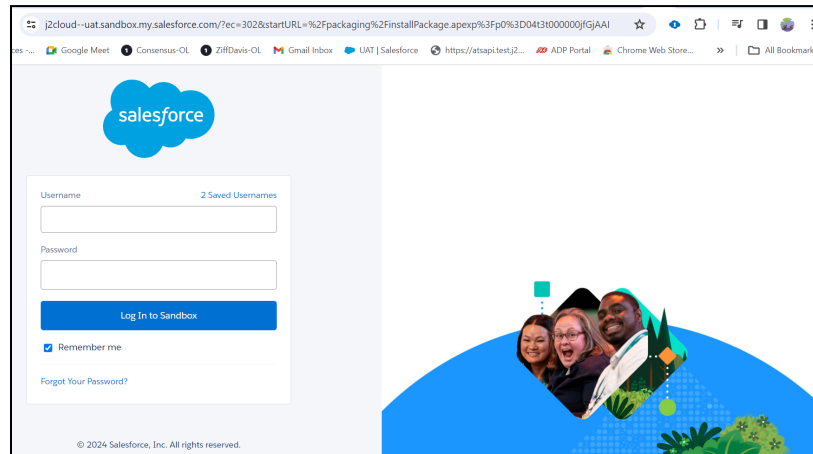


Follow these steps to build installation link for your org

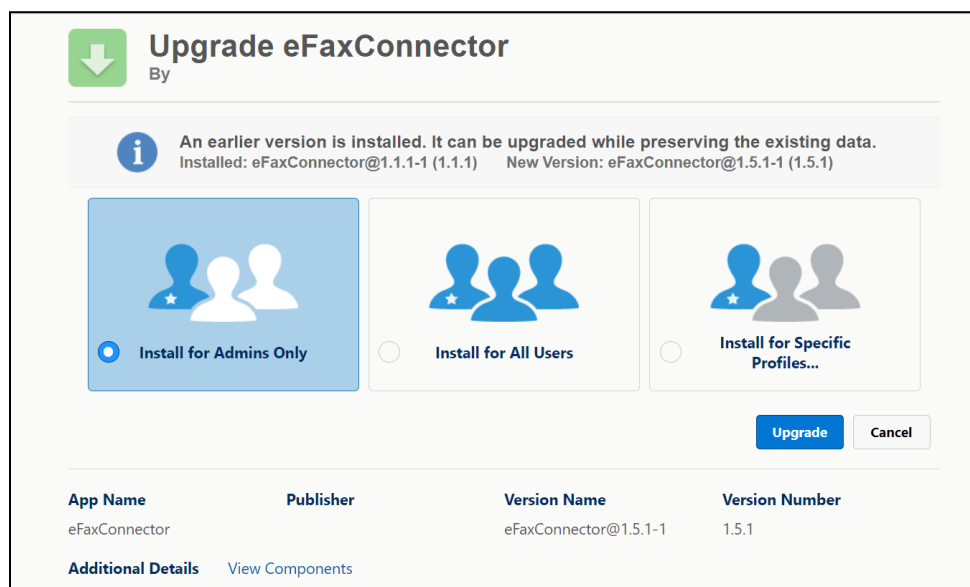
1. Obtain Current My Domain URL for your org by navigating to **Setup > Company Settings > My Domain** under **My Domain** Details :
 - Example Production My Domain: `efax.my.salesforce.com`
 - Example Sandbox My Domain: `efax--qa.sandbox.my.salesforce.com`
 - `https://Current My Domain URL/packaging/installPackage.apexp?p0=04t3t000000jfGjAAI`
2. Copy and paste the generated URL in a browser.

 <https://efax--qa.sandbox.my.salesforce.com/packaging/installPackage.apexp?p0=04t3t000000jfGjAAI>

3. Enter your **Username** and **Password** for the Salesforce org and click **Login**.



4. If you are already logged into Salesforce you can choose to append the following URL to your salesforce my domain :
`/packaging/installPackage.apexp?p0=04t3t000000jfGjAAI`
5. Note the installed version number and the new version number for this upgrade.
 - o An earlier version is installed. It can be upgraded while preserving the existing data.
 - o Installed: eFaxConnector@1.1.1-1 (1.1.1)
 - o New Version: eFaxConnector@1.5.1-1 (1.5.1)



6. Install for admins only is selected by default; select your install option, and then select **Upgrade**.

- Grant access to third-party websites by selecting the checkboxes, selecting **Yes**, and then clicking **Continue**.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
admin.securedocex.com	☒
api.securedocex.com	☒

☒ Yes, grant access to these third-party web sites

Continue
Cancel

- Click on **View Components** to review new components in this package upgrade.
- Click **Upgrade**.
- After clicking Upgrade you will see a message describing the progress and confirmation message after installation is complete. It can take up to 30 minutes depending on the size of the package and the org to complete the upgrade.

Upgrade eFaxConnector

By

Upgrading and granting access to admins...

App Name	Publisher	Version Name	Version Number
eFaxConnector		eFaxConnector@1.5.1-1	1.5.1

[Additional Details](#)
[View Components](#)

- You will receive an email confirmation if it's successful or failed.

Sandbox: Package eFaxConnector Install Successful External

S

support@salesforce.com

to me ▾

10:15 PM (4 minutes ago)

☆ ↶ ⋮

Your request to install package "eFaxConnector eFaxConnector@1.5.1-1" was successful.

Organization: eFax Cloud Services, Inc. (00DXX000000xyzh)
 User: eFax Admin (005XX000000XS6w)
 Package: eFaxConnector (04t3t000000jGj)

Some components, such as custom objects, custom report types, and workflow rules, must be activated using the package deploy process, before they are available to your organization.

12. On successful installation, the latest version of eFax Connector doesn't require relinking a fax account. It will continue to use the existing Admin settings, batch file size, and the UI file size (defaulted to 1MB).
- Please select your desired file size for both UI and batch file size.

The screenshot shows the 'Admin Settings' page. On the left is a sidebar with navigation links: 'Send Fax', 'Sent Faxes', 'Received Faxes', 'Recent Faxes', 'To Me', 'All Faxes', 'Admin Settings' (selected), 'De-Link eFax Account', 'Configure eFax Account', 'Manage Users', and 'Manage Fax Lines'. The main content area is titled 'Admin Settings' and includes a 'Configure eFax Account' link. It displays the 'Current Integration Status' as 'Connected' with a green checkmark. Below this is the 'Activate / Deactivate App' section with a toggle switch set to 'Active'. The 'First Fax Date' is set to '2023/12/01' with a note to stop the batch before updating. The 'Inbound Fax Type' is set to 'PDF'. The 'Batch File Size' and 'UI File Size' are both set to '1 MB'. The 'API Token' is shown as 'Connected' with a refresh icon and a '1 hrs 29 mins' timer. At the bottom, there is a 'Batch:' section with a 'Stop Batch' button.

- If required, stop and start batch from admin settings, to configure automated fax image download for received faxes. Select the check box "Also, start batch for auto retrieve of fax document into Salesforce" and then select **Yes**.

The screenshot shows a 'Confirmation' dialog box. It contains a checked checkbox followed by the text 'Also, start batch for auto retrieve of fax document into Salesforce.' At the bottom right, there are two buttons: 'No' and 'Yes'.

- If you wish to choose the manual fax image download option when viewing faxes, uncheck the "Also, start batch for auto retrieve of fax document into Salesforce" option and then select **Yes**.

The screenshot shows a 'Confirmation' dialog box. It contains an unchecked checkbox followed by the text 'Also, start batch for auto retrieve of fax document into Salesforce.' At the bottom right, there are two buttons: 'No' and 'Yes'.

Appendix - Upgrade Package Components

Package Components				
▼ Pages (23)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	FaxRecipients		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	EfaxTab		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SpinnerEvent		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	ResendApp		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	CustomLookup		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	ManageFaxLines		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	resendFax		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	LightningCmpEvent		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	EfaxApp		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	CustomToast		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	attachments		Visualforce Page	This is an upgraded component. It will be updated to the new version.
Update	Spinner		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	ReceivedFaxesScreen		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	ConfigureEfaxAccount		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	ManageuserComp		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	Link_Efax		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	EfaxTab		Visualforce Page	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	ModifyAddFaxButton		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SetparentAttributeEvent		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SentFaxComp		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SendefaxScreenApp		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SendefaxScreen		Aura Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	SendefaxScreen		Visualforce Page	This is an upgraded component. It will be updated to the new version.

Package Components				
▼ Resources (3)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Efax		Asset File	This is a brand new component.
Update	cometd_zip		Static Resource	This is an upgraded component. It will be updated to the new version.
Create	efax_corporate_logo2		Asset File	This is a brand new component.

Package Components				
▼ Code (42)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	CRUDFLSHelper		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_Batch_DelinkEfaxAccount		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ManageUserController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	FaxRecipientsController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_AttachmentsController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_FilesUtility		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Trig_Efax	Fax	Apex Trigger	This is an upgraded component. It will be updated to the new version.
Update	Test_Constants		Apex Class	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	Test_Constants		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ModifyAddFaxController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ConfigureEfaxAccountController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	SendefaxScreenController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ManageFaxLinesController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ActivityHelper		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	EfaxBatchMonitor		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_SentfaxesController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ConfigEfaxAccountWrapper		Apex Class	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	EfaxBulkUpdateBatch		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	EfaxTabController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	EfaxService		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ConfigureEfaxAccountController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ApiUtility		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_FaxRecipientsController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	SentfaxesController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	AttachmentsController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_SendefaxScreenController		Apex Class	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	Test_DebugHelper		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ManageFaxLinesController		Apex Class	This is an upgraded component. It will be updated to the new version.
Create	EfaxDocumentBatch		Apex Class	This is a brand new component.
Update	EfaxServiceBatch		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Batch_DelinkEfaxAccount		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ManageUserController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	EfaxBulkUpdateService		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	AuthBuilderClass		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ModifyAddFaxController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	ReceivedfaxesController		Apex Class	This is an upgraded component. It will be updated to the new version.

Package Components				
Update	Test_HelperClasses		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_AuthBuilderClass		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	FilesUtility		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Trig_EfaxAccountSetting	eFax Account Setting	Apex Trigger	This is an upgraded component. It will be updated to the new version.
Update	Test_EfaxTabController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	Test_ReceivedfaxesController		Apex Class	This is an upgraded component. It will be updated to the new version.
Update	EfaxServiceHelper		Apex Class	This is an upgraded component. It will be updated to the new version.

Package Components				
▼ Objects (1)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	eFax Account Setting		Custom Object	This is an upgraded component. It will be updated to the new version.
▼ Fields (6)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Auto Document	eFax Account Setting	Custom Field	This is a brand new component.
Create	Documents Retrieved	Fax	Custom Field	This is a brand new component.
Create	UI File Size	eFax Account Setting	Custom Field	This is a brand new component.
Create	Batch File Size	eFax Account Setting	Custom Field	This is a brand new component.
Create	Size	Fax	Custom Field	This is a brand new component.
Update	Primary Contact	Fax	Custom Field	This is an upgraded component. It will be updated to the new version.

Package Components				
Create	UI File Size	eFax Account Setting	Custom Field	This is a brand new component.
Create	Batch File Size	eFax Account Setting	Custom Field	This is a brand new component.
Create	Size	Fax	Custom Field	This is a brand new component.
Update	Primary Contact	Fax	Custom Field	This is an upgraded component. It will be updated to the new version.
▼ Permission Sets (2)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	eFax Connector App Admin Users		Permission Set	This is an upgraded component. It will be updated to the new version.
Update	eFax Connector App Non Admin Users		Permission Set	This is an upgraded component. It will be updated to the new version.
Remote Access				
No records to display				