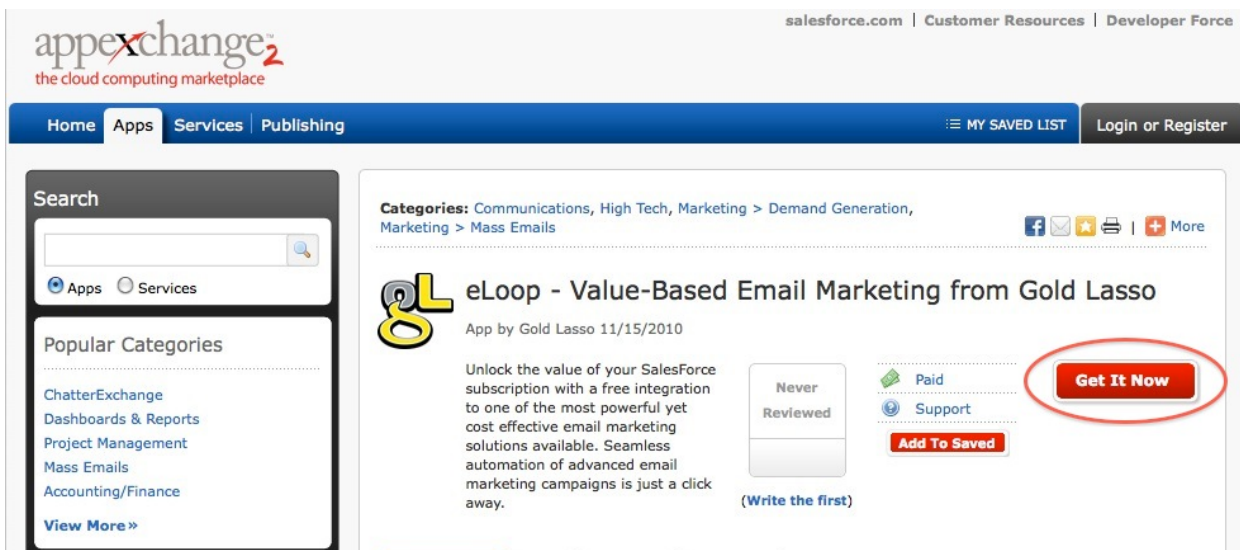




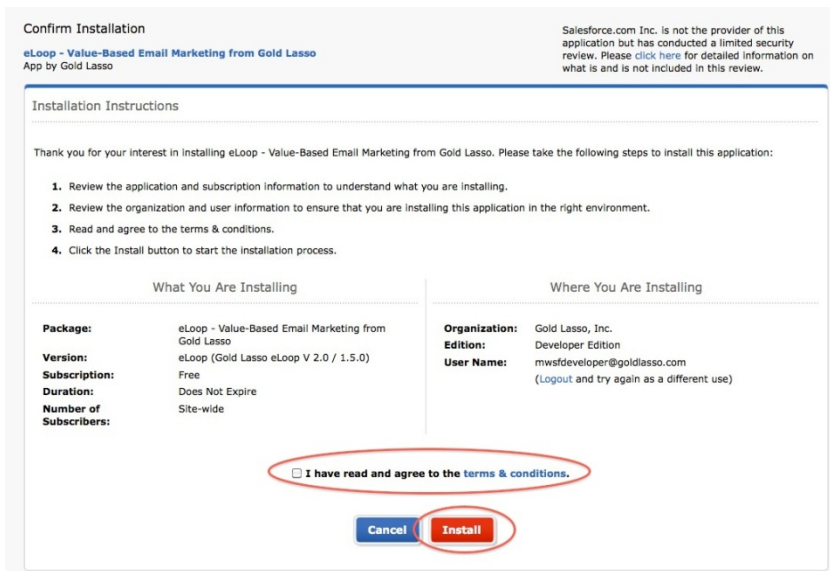
Installation Instructions

These steps will guide you through integrating your Salesforce account with eLoop. Once the package has been installed you will be able to send and measure your campaigns from Salesforce. Once you have completed your install, please see our How to Guide for instructions on getting started. If you have any questions during the install process, please contact us at service@goldlasso.com.

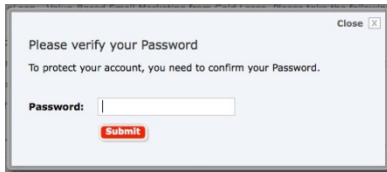
1. Go to the [Gold Lasso AppExchange listing](#) and click the “Get It Now” button to begin the installation process.



2. Enter your salesforce.com login and password to begin the package installation process.
3. Agree to the terms and conditions by checking the box for “I have read and agree to the terms & conditions” and click the “Install button.

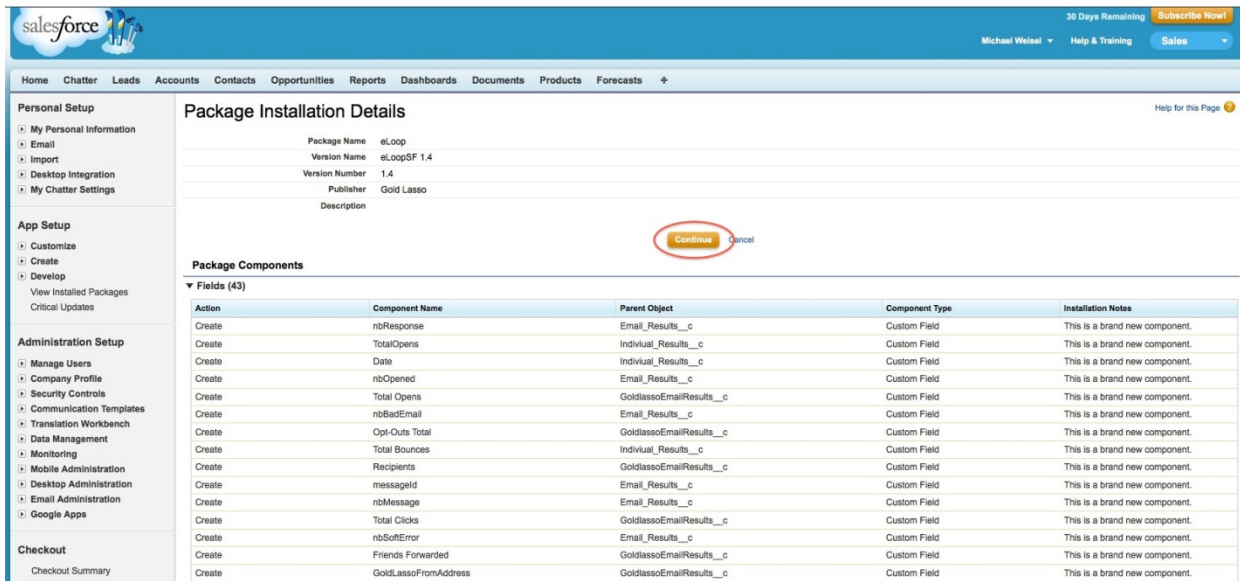


NOTE: This will bring up a dialog box to verify your password. Once you have verified your password click the “Submit” button to continue.



A small dialog box titled "Please verify your Password". It contains a text input field for the password and a red "Submit" button. The text below the input field says "To protect your account, you need to confirm your Password."

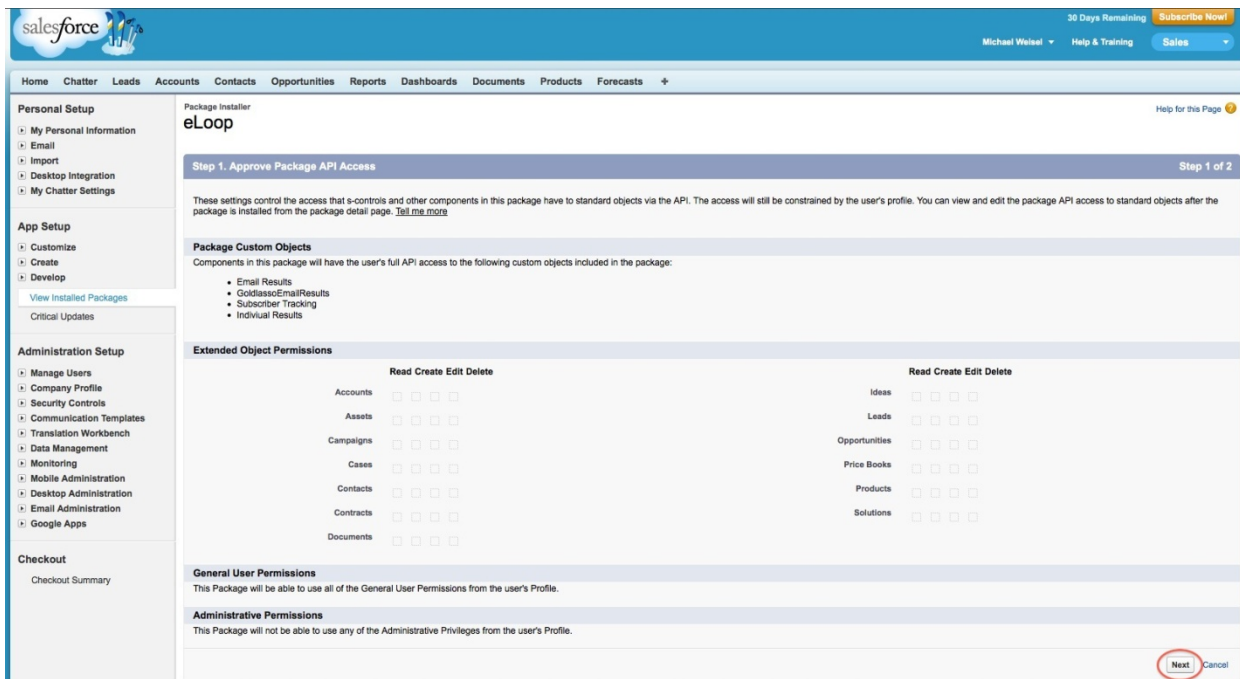
4. Click the “Continue” button once you have read the Installation Details.



The screenshot shows the Salesforce Package Installation Details page for the "eLoop" package. The left sidebar contains navigation links for Personal Setup, App Setup, Administration Setup, and Checkout. The main content area displays the package details: Package Name (eLoop), Version Name (eLoopSF 1.4), Version Number (1.4), Publisher (Gold Lasso), and Description. Below this, there is a "Continue" button circled in red. The "Package Components" section lists 43 fields with their respective actions, component names, parent objects, and installation notes.

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	nbResponse	Email_Results__c	Custom Field	This is a brand new component.
Create	TotalOpens	Individual_Results__c	Custom Field	This is a brand new component.
Create	Date	Individual_Results__c	Custom Field	This is a brand new component.
Create	nbOpened	Email_Results__c	Custom Field	This is a brand new component.
Create	Total Opens	GoldLassoEmailResults__c	Custom Field	This is a brand new component.
Create	nbBadEmail	Email_Results__c	Custom Field	This is a brand new component.
Create	Opt-Outs Total	GoldLassoEmailResults__c	Custom Field	This is a brand new component.
Create	Total Bounces	Individual_Results__c	Custom Field	This is a brand new component.
Create	Recipients	GoldLassoEmailResults__c	Custom Field	This is a brand new component.
Create	messageId	Email_Results__c	Custom Field	This is a brand new component.
Create	nbMessage	Email_Results__c	Custom Field	This is a brand new component.
Create	Total Clicks	GoldLassoEmailResults__c	Custom Field	This is a brand new component.
Create	nbSoftError	Email_Results__c	Custom Field	This is a brand new component.
Create	Friends Forwarded	GoldLassoEmailResults__c	Custom Field	This is a brand new component.
Create	GoldLassoFromAddress	GoldLassoEmailResults__c	Custom Field	This is a brand new component.

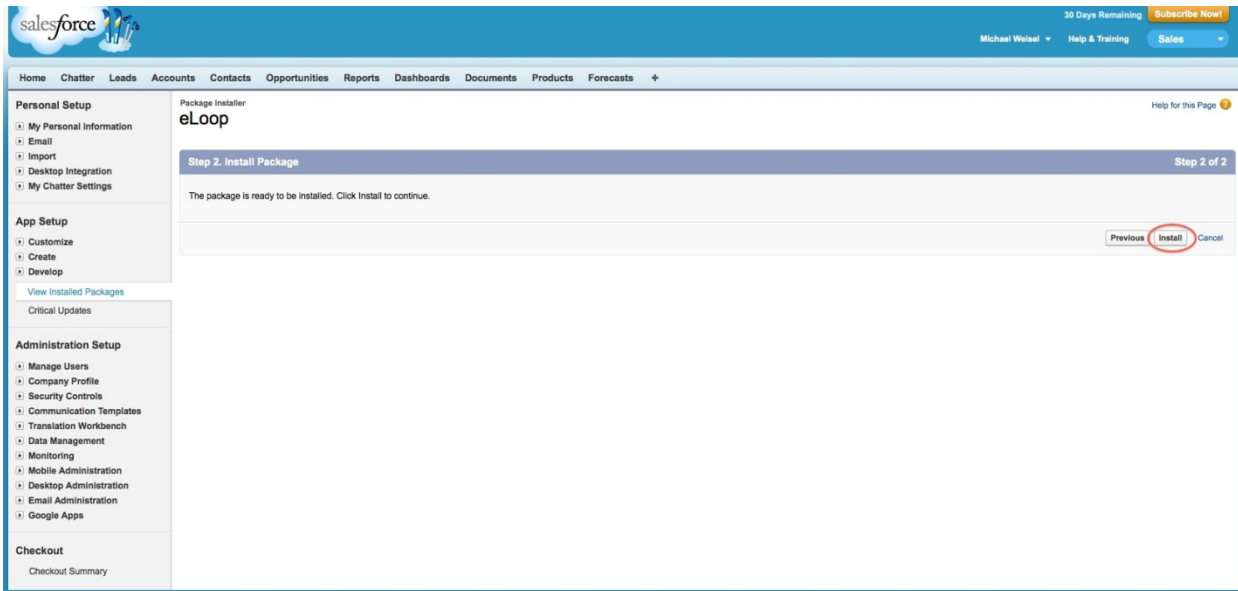
5. Click the “Next” button to approve the API access.



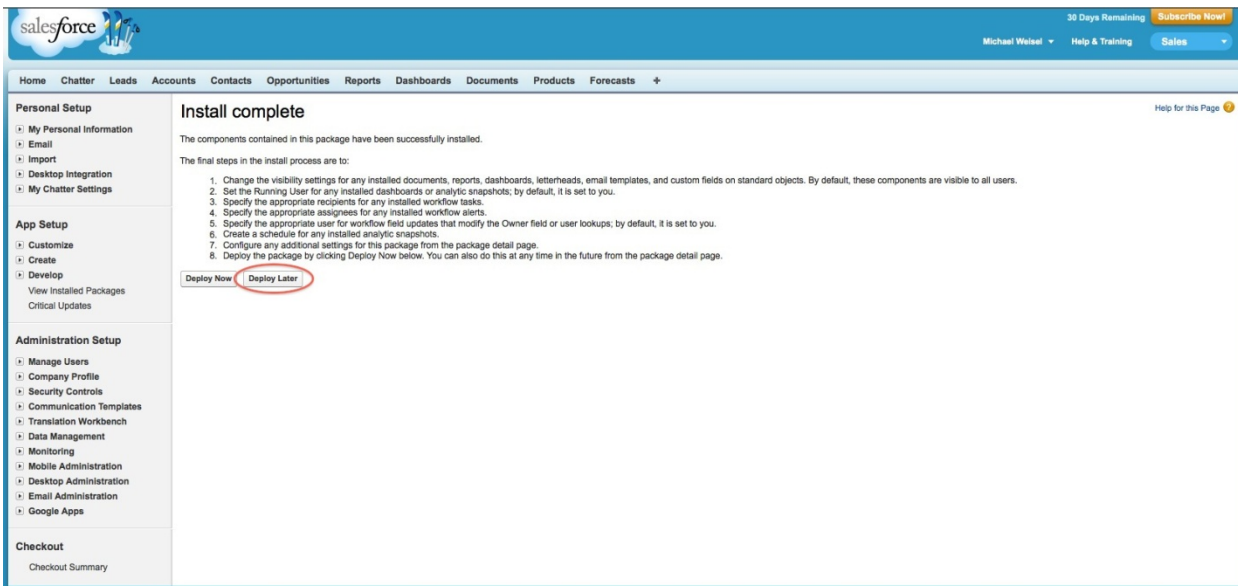
The screenshot shows the Salesforce Package API Access screen for the "eLoop" package. The left sidebar contains navigation links for Personal Setup, App Setup, Administration Setup, and Checkout. The main content area displays the "Step 1: Approve Package API Access" section. It includes a "Package Custom Objects" list and a table of "Extended Object Permissions" for various objects like Accounts, Assets, Campaigns, Cases, Contracts, Documents, Ideas, Leads, Opportunities, Price Books, Products, and Solutions. The "Next" button is circled in red.

Object	Read	Create	Edit	Delete
Accounts	☐	☐	☐	☐
Assets	☐	☐	☐	☐
Campaigns	☐	☐	☐	☐
Cases	☐	☐	☐	☐
Contracts	☐	☐	☐	☐
Documents	☐	☐	☐	☐
Ideas	☐	☐	☐	☐
Leads	☐	☐	☐	☐
Opportunities	☐	☐	☐	☐
Price Books	☐	☐	☐	☐
Products	☐	☐	☐	☐
Solutions	☐	☐	☐	☐

6. Click the “Install” button to install the package.



7. Click the “Deploy Now” button to perform the final steps in installing the Gold Lasso eLoop app.



8. Click the “Deploy” button to finish the installation.

Deploy Package

Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Action Name	Parent Object	Type
Email Results		Custom Object
GoldlassoEmailResults		Custom Object
Individual Results		Custom Object
Subscriber Tracking		Custom Object

[Deploy](#) [Cancel](#)

NOTE: You will then see the following screen:

eLoop (Managed)

Package Details

Back to List: Custom Object Definitions

Uninstall Deploy Show Dependencies

Package Name	eLoop	Version Number	1.4
Language	English	First Installed Version Number	1.4
Version Name	eLoopSF 1.4	Package Type	Managed
Namespace Prefix	goldlasso	API Access	Restricted (Disable Restrictions)
Publisher	Gold Lasso	Modified By	Michael Weisel, 11/2/2010 12:02 PM
Description			
Installed By	Michael Weisel, 11/2/2010 12:02 PM		

Uninstall Deploy Show Dependencies

Action Name	Parent Object	Type
Average Click Through Rate		Report
Average Completed Transmission		Report
Average Open		Report
Budgeted Profit		Report
CCMO Campaign IQ	Email Results	Custom Field
Campaign	GoldlassoEmailResults	Custom Field
CampaignStatus	Campaign	Button or Link
Company Performance Dashboard		Dashboard
Complete Opt-Outs	GoldlassoEmailResults	Custom Field
Completed Transmission	GoldlassoEmailResults	Custom Field
Contact	Individual Results	Custom Field
Date	Individual Results	Custom Field
Deliverability Rate		Report
Email Results		Custom Object
Email Results Layout	Email Results	Page Layout
Friends Forwarded	GoldlassoEmailResults	Custom Field
GoldLassoCampaignID	GoldlassoEmailResults	Custom Field

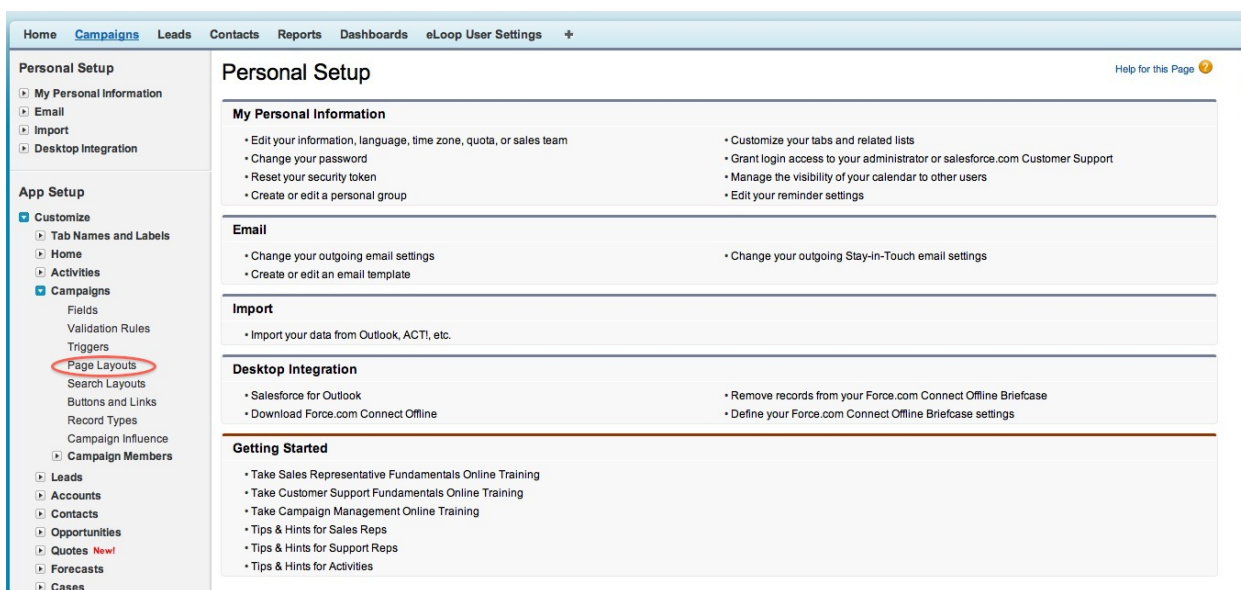
In order to utilize all of the functionality that the eLoop Salesforce integration has to offer, you must first setup your Salesforce instance with the necessary custom objects. The following instructions explain how to modify the Salesforce page layouts to display the integration.

IMPORTANT: What type of Salesforce account do you have? There are two types of setups available. For Enterprise, Unlimited or Developer accounts use Quick Setup instructions. All other accounts should use Campaign Section Setup.

Campaign Section Setup (for all accounts other than Enterprise, Unlimited or Developer)

NOTE: If you have an Enterprise, Unlimited, or Developer Salesforce account you may skip to the [5-minute Quick Setup section](#).

1. Click on your name at the top right of the screen and choose “Setup” from the drop down menu.
2. Under the “App Setup” section in the left column, choose the “Customize” option, and then choose the “Campaigns” option and finally the “Page Layout” option.



NOTE: If the “Enhanced Page Layout Editor” video pops up, close that window to continue.

NOTE: The next step will only apply if you have other page layouts saved. If you are using a fresh account, skip to step 4.

3. From the “Campaign Page Layout” screen, choose the “Edit” option to edit the layout for the campaign section.

Campaign Page Layout

This page allows you to create different page layouts to display Campaign data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Campaign Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Campaign Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:39 PM

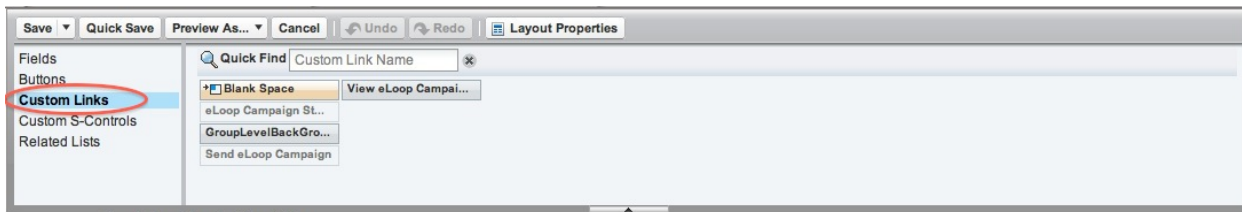
4. From the left navigation section within the campaign layout, choose the “Buttons” option to display the available buttons.



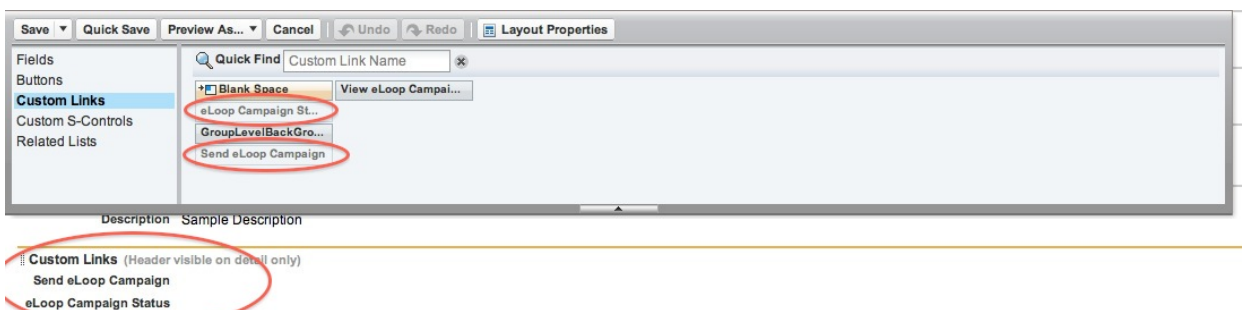
5. Select “Send eLoop Campaign” and drag it to the section labeled “Custom Buttons” located below the “Campaign Sample” bar.



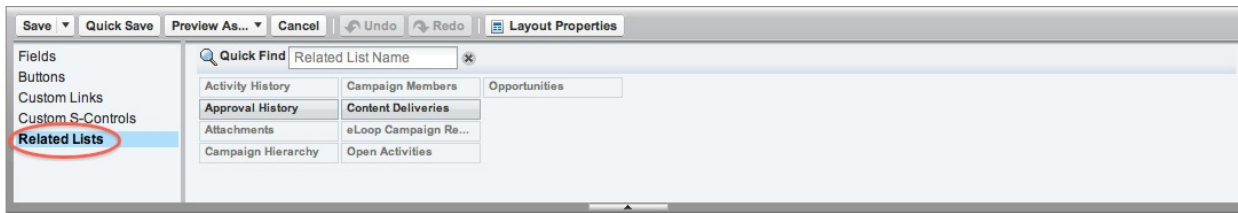
6. From the left navigation section within the campaign layout, choose the “Custom Links” option.



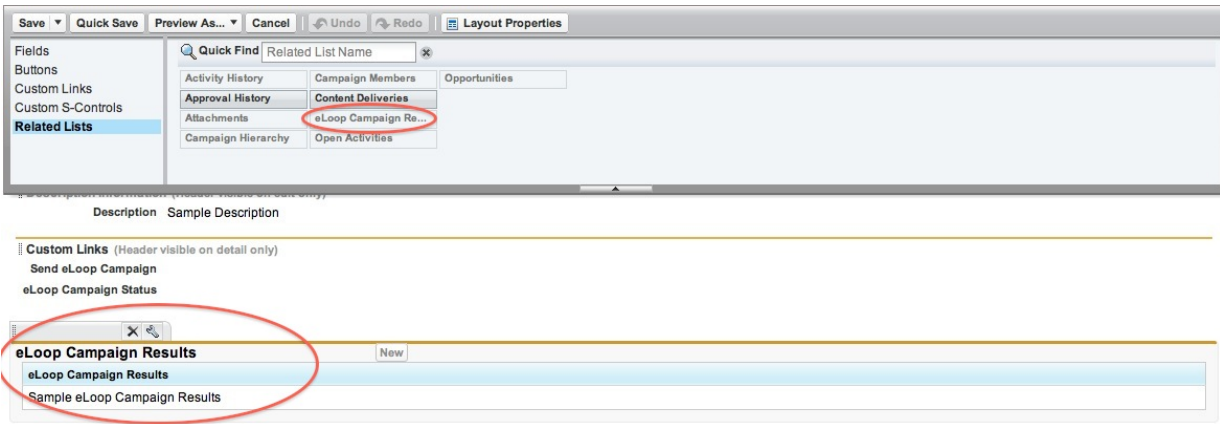
7. Select “Send eLoop Campaign” and “eLoop Campaign Status” and drag each of them to the “Custom Links” section.



8. From the left navigation section within the campaign layout, choose the “Related Lists” option.



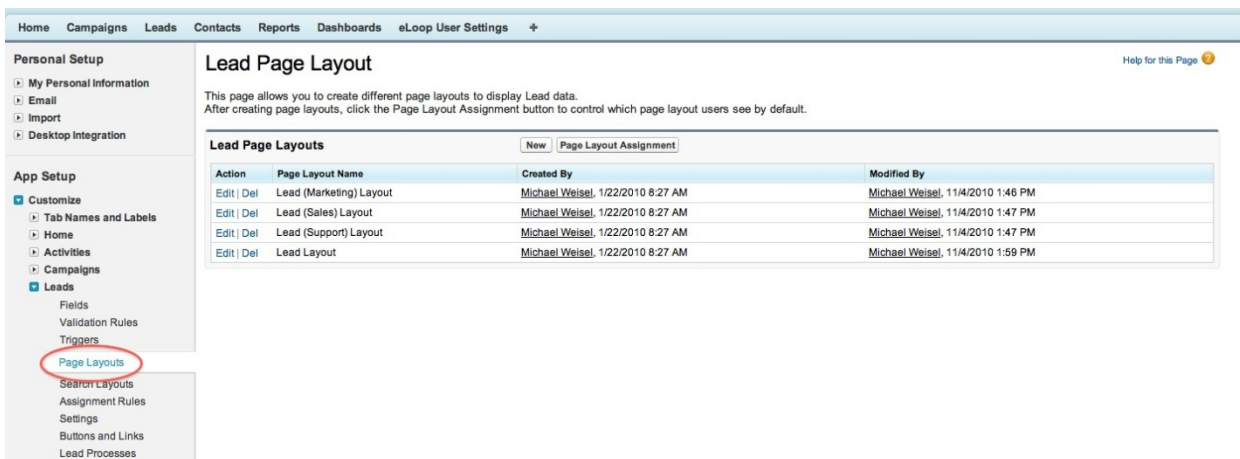
9. Select “eLoop Campaign Results” (some portions of the text may be cut off) and drag it to the section directly below the “Custom Links” section.



NOTE: When you're dragging the object a green check box designates an area that the object can be placed.

Leads Section Setup

10. Under the “App Setup” section of the left column, choose the “Customize” option, and then choose the “Leads” option and finally the “Page Layout” option.



NOTE: Users with previously-saved layouts should follow this step. Users with fresh accounts should skip to step 12.

11. From the “Lead Page Layout” screen, choose the “Edit” option to edit the lead layout for the Lead section.

Lead Page Layout

[Help for this Page](#)

This page allows you to create different page layouts to display Lead data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Lead Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Lead (Marketing) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:46 PM
Edit Del	Lead (Sales) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:47 PM
Edit Del	Lead (Support) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:47 PM
Edit Del	Lead Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:59 PM

12. From the left navigation section within the lead layout, choose the “Buttons” option to display the available buttons.

The screenshot shows the 'Lead Layout' interface. On the left, a navigation pane has 'Buttons' selected and circled in red. The main area displays a 'Quick Find' search bar and a list of buttons: Clone, Find Duplicates, Convert, Send Single Lead..., Delete, Sharing, and Edit, Submit for Approval.

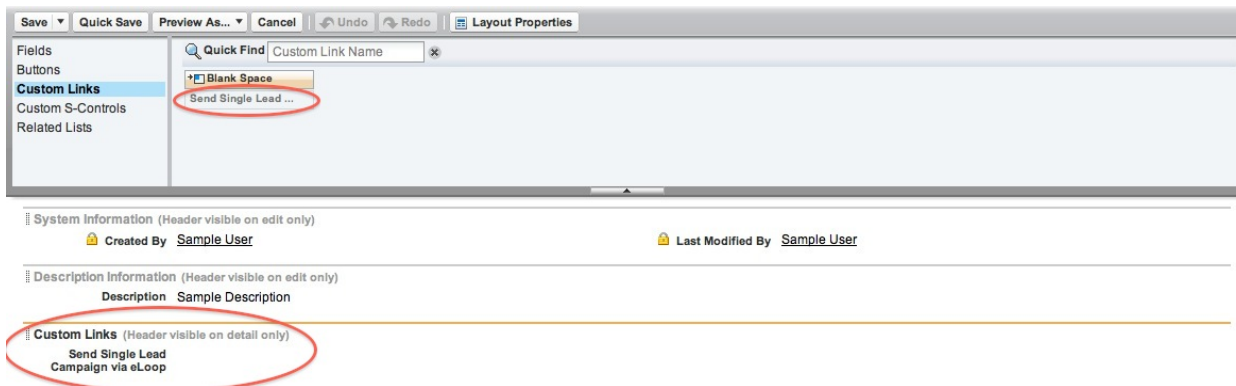
13. Choose “Send Single Lead eLoop Campaign” and drag it to the “Custom Buttons” section (some portions of the text may be cut off).

The screenshot shows the 'Lead Layout' interface. The 'Buttons' section is selected in the left navigation pane. The main area displays a list of buttons. The 'Send Single Lead Campaign via eLoop' button is circled in red. Below the list, there is a 'Lead Sample' section and a 'Highlights Panel' section. At the bottom, there is a 'Lead Detail' section with a 'Standard Buttons' group (Edit, Delete, Convert, Clone, Sharing, Find Duplicates) and a 'Custom Buttons' group (Send Single Lead Campaign via eLoop).

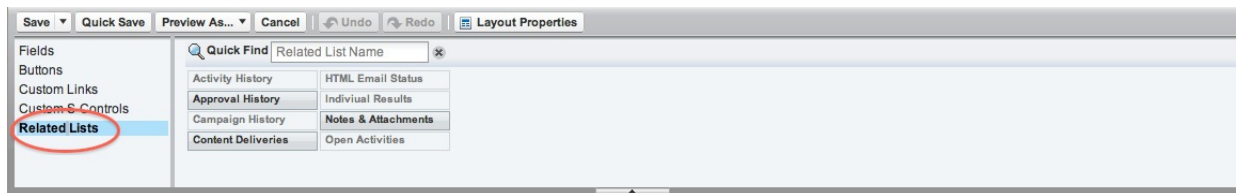
14. From the left navigation section within the lead layout, choose the “Custom Links” option.

The screenshot shows the 'Lead Layout' interface. On the left, a navigation pane has 'Custom Links' selected and circled in red. The main area displays a 'Quick Find' search bar and a list of custom links: Blank Space and Send Single Lead...

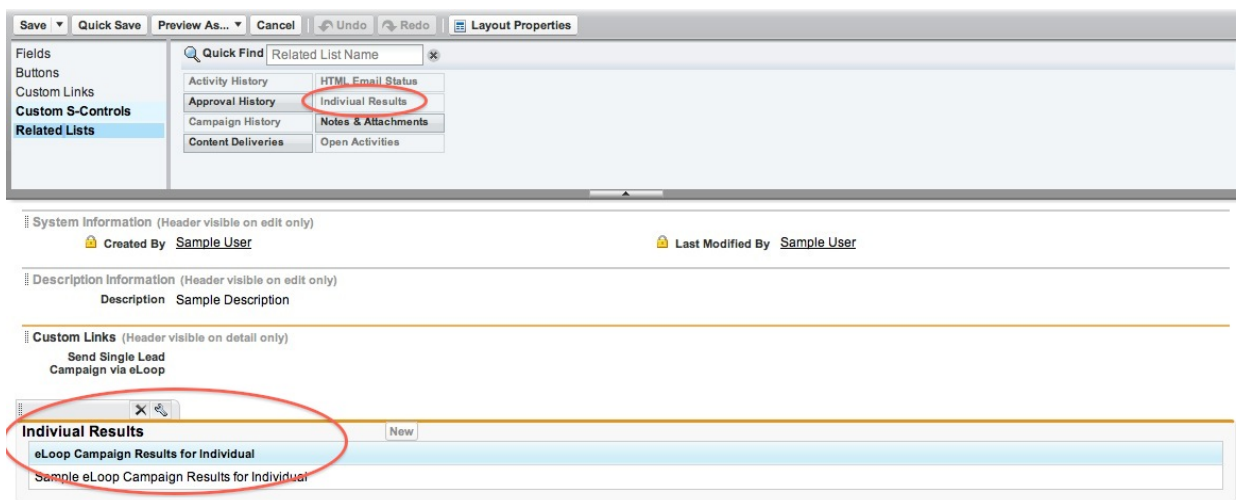
15. Select “Send Single eLoop Campaign” and drag it to the “Custom Links” section.



16. From the left navigation section within the campaign layout, choose the “Related Lists” option.



17. Select “Individual Results” (some portions of the text may be cut off) and drag it to the section directly below the “Custom Links” section.



NOTE: When you're dragging the object a green check box designates an area that the object can be placed.

NOTE: Repeat steps 11 through 17 if you would like to customize the Leads section for Marketing, Sales, or Support (see image in step 11)

Contacts Section Setup

18. Under the “App Setup” section, choose the “Customize” option, and then choose the “Contacts” option and finally the “Page Layout” option.

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts**
 - Fields
 - Related Lookup Filters
 - Validation Rules
 - Triggers
 - Page Layouts**
 - Search Layouts
 - Buttons and Links

Contact Page Layout

This page allows you to create different page layouts to display Contact data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Contact Page Layouts [New] [Page Layout Assignment]

Action	Page Layout Name	Created By	Modified By
Edit Del	Contact (Marketing) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact (Sales) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact (Support) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/10/2010 4:22 AM

Note: Only users with previously-saved layouts will need to do this step. All others skip to step 20.

19. From the “Contact Page Layout” screen, choose the “Edit” option to edit the contact layout for the contact section.

Contact Page Layout

This page allows you to create different page layouts to display Contact data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Contact Page Layouts [New] [Page Layout Assignment]

Action	Page Layout Name	Created By	Modified By
Edit Del	Contact (Marketing) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact (Sales) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact (Support) Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/5/2010 7:33 AM
Edit Del	Contact Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/10/2010 4:22 AM

20. From the left navigation section within the lead layout, choose the “Buttons” option to display the available buttons.

Contact Layout [Mini Page Layout] [Mini Console View] [Video Tutorial] [Help for this Page]

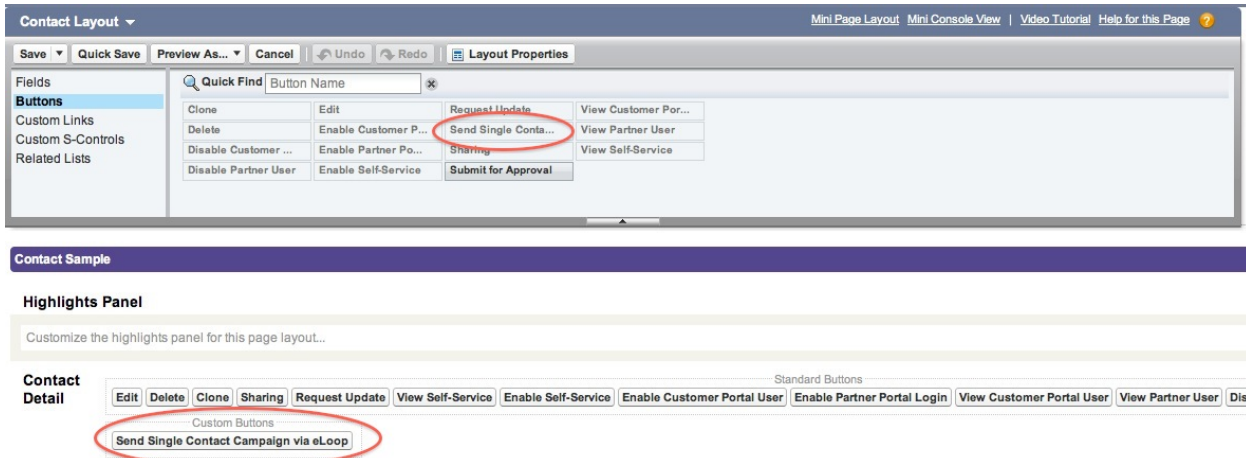
[Save] [Quick Save] [Preview As...] [Cancel] [Undo] [Redo] [Layout Properties]

Fields [Quick Find] [Button Name] ✕

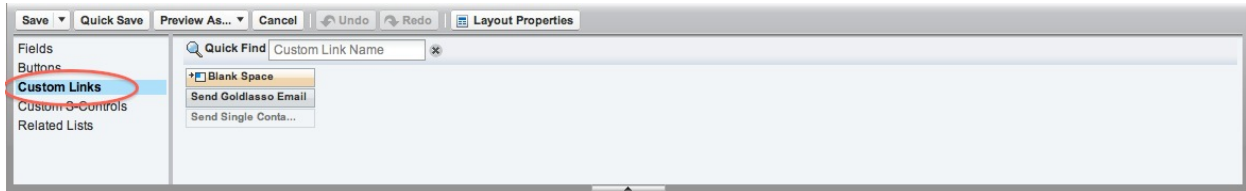
- Buttons**
- Custom Links
- Custom S-Controls
- Related Lists

Clone	Edit	Request Update	View Customer Por...
Delete	Enable Customer P...	Send Single Conta...	View Partner User
Disable Customer ...	Enable Partner Po...	Sharing	View Self-Service
Disable Partner User	Enable Self-Service	Submit for Approval	

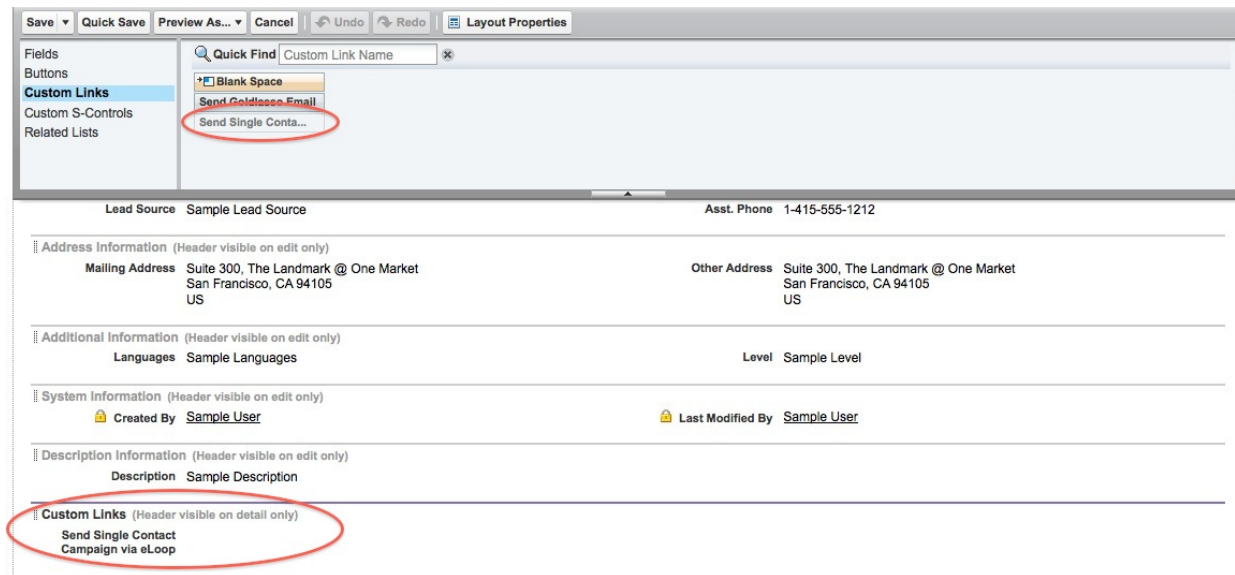
21. Choose “Send Single Campaign eLoop Campaign” and drag it to the “Custom Buttons” section (some portions of the text may be cut off).



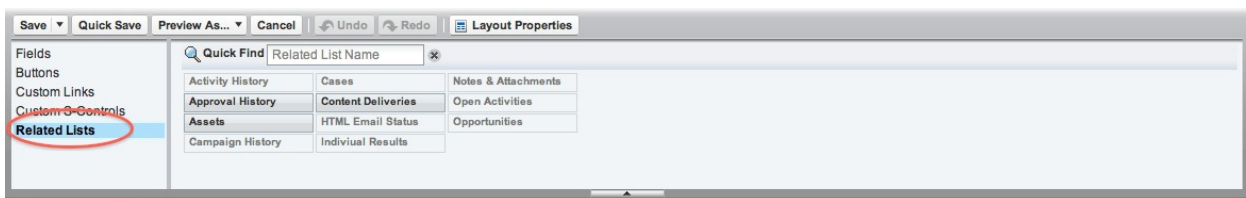
22. From the left navigation section within the contact layout, choose the “Custom Links” option.



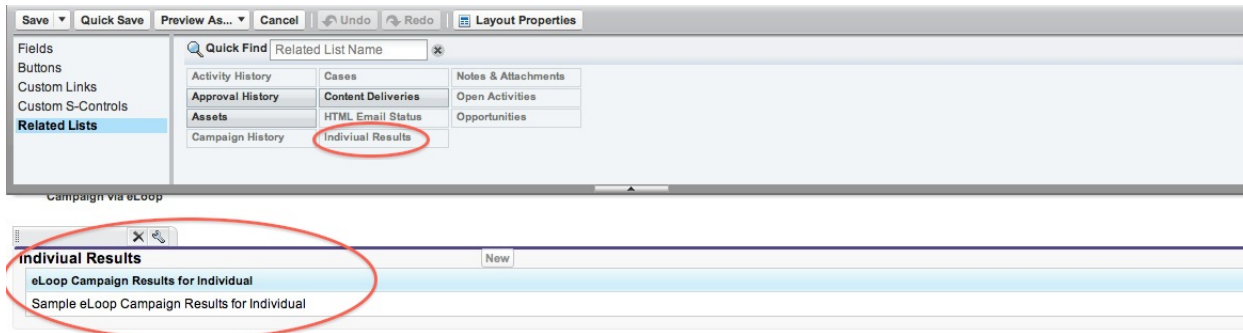
23. Choose “Send Single Contact eLoop Campaign” and drag it to the “Custom Links” section (some portions of the text may be cut off).



24. From the left navigation section within the contact layout, choose the “Related Lists” option.



25. Select “Individual Results” (some portions of the text may be cut off) and drag it to the section directly below the “Custom Links” section.



NOTE: When you're dragging the object a green check box designates an area that the object can be placed.

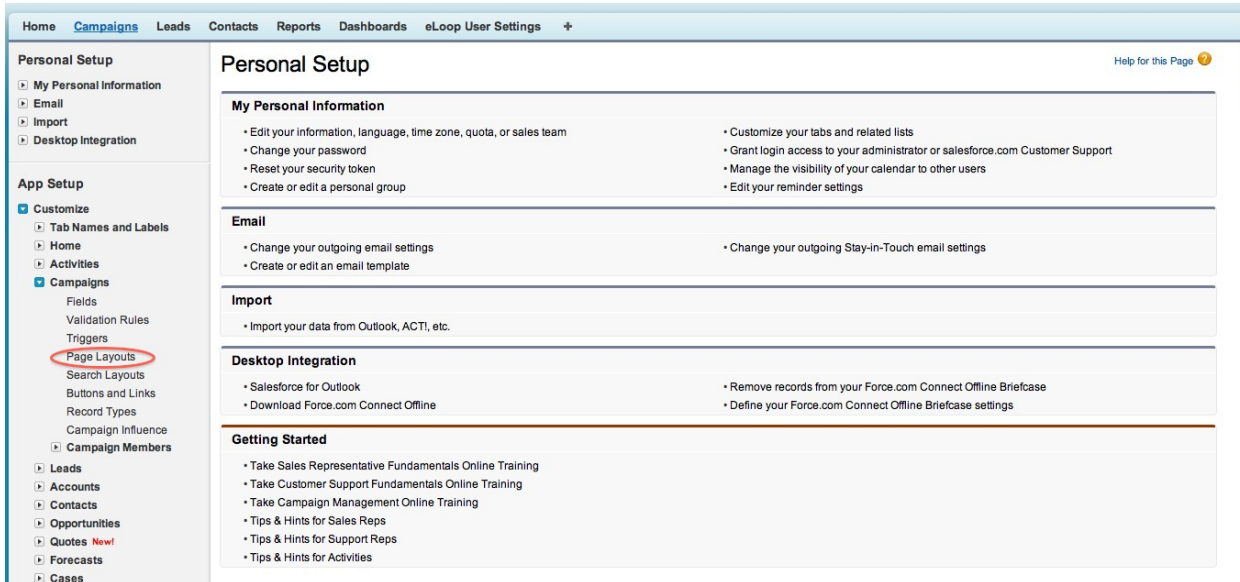
NOTE: Repeat steps 18 through 25 if you would like to customize the Leads section for Marketing, Sales, or Support (see image in step 18)

Quick Setup (For Enterprise, Unlimited or Developer accounts only)

This type of setup should take approximately 5 minutes.

NOTE: If you have one of the other types of Salesforce Accounts, please go back to the section called [“Campaign Section Setup”](#).

1. Under the “App Setup” section, choose the “Customize” option, and then choose the “Campaigns” option and finally the “Page Layout” option.



2. From the Campaign Page Layout screen choose the “Page Layout Assignment” button located at the top.

Campaign Page Layout

This page allows you to create different page layouts to display Campaign data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Campaign Page Layouts			
New Page Layout Assignment			
Action	Page Layout Name	Created By	Modified By
Edit Del	Campaign Layout	Michael Weisel, 1/22/2010 8:27 AM	Michael Weisel, 11/4/2010 1:39 PM

3. Once the Profiles page appears, click the “Edit Assignment” button to continue.

Campaign Page Layout Assignment	
The table below shows the page layout assignments for different profiles.	
Edit Assignment	
Profiles	Page Layout
Contract Manager	Campaign Layout
Custom: Marketing Profile	Campaign Layout
Custom: Sales Profile	Campaign Layout
Custom: Support Profile	Campaign Layout
Marketing User	Campaign Layout
Partner User	Campaign Layout
Read Only	Campaign Layout
Solution Manager	Campaign Layout
Standard Platform User	Campaign Layout
Standard User	Campaign Layout
System Administrator	Campaign Layout
Edit Assignment	

4. On the left side choose the profile (or profiles) that you would like to modify. In this case we used the System Administrator account. Once highlighted choose the “Page Layout To Use” dropdown box from the top and choose “Campaign Layout (Installed Package eLoop).

Edit Page Layout Assignment Help for this Page

Campaign

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use ✓ -- Select Page Layout --

Campaign Layout
Campaign Layout (Installed Package: eLoop)

1 Selected 0 Changed

Profiles	Layout
Contract Manager	Campaign Layout
Custom: Marketing Profile	Campaign Layout
Custom: Sales Profile	Campaign Layout
Custom: Support Profile	Campaign Layout
Force.com - Free User	Campaign Layout
Marketing User	Campaign Layout
Partner User	Campaign Layout
Read Only	Campaign Layout
Solution Manager	Campaign Layout
Standard Platform User	Campaign Layout
Standard User	Campaign Layout
System Administrator	Campaign Layout

Save Cancel

5. Once you have made your selections, choose the “Save” button at the bottom to display your changes.

Page Layout Assignment Help for this Page

Campaign

The table below shows the page layout assignments for different profiles.

Edit Assignment

Profiles	Page Layout
Contract Manager	Campaign Layout
Custom: Marketing Profile	Campaign Layout
Custom: Sales Profile	Campaign Layout
Custom: Support Profile	Campaign Layout
Force.com - Free User	Campaign Layout
Marketing User	Campaign Layout
Partner User	Campaign Layout
Read Only	Campaign Layout
Solution Manager	Campaign Layout
Standard Platform User	Campaign Layout
Standard User	Campaign Layout
System Administrator	Campaign Layout (Installed Package: eLoop)

Edit Assignment

NOTE: Quick Setup steps 1-5 should be performed for the “Contact” and “Lead” section as well to complete the Quick Install. To begin, go back to the “App Setup” section (located on the left navigation), choose the “Customize” option, and then choose the “Contacts” and finally the “Page Layout” option. Once completed, you can follow the same instructions for the “Leads” option.