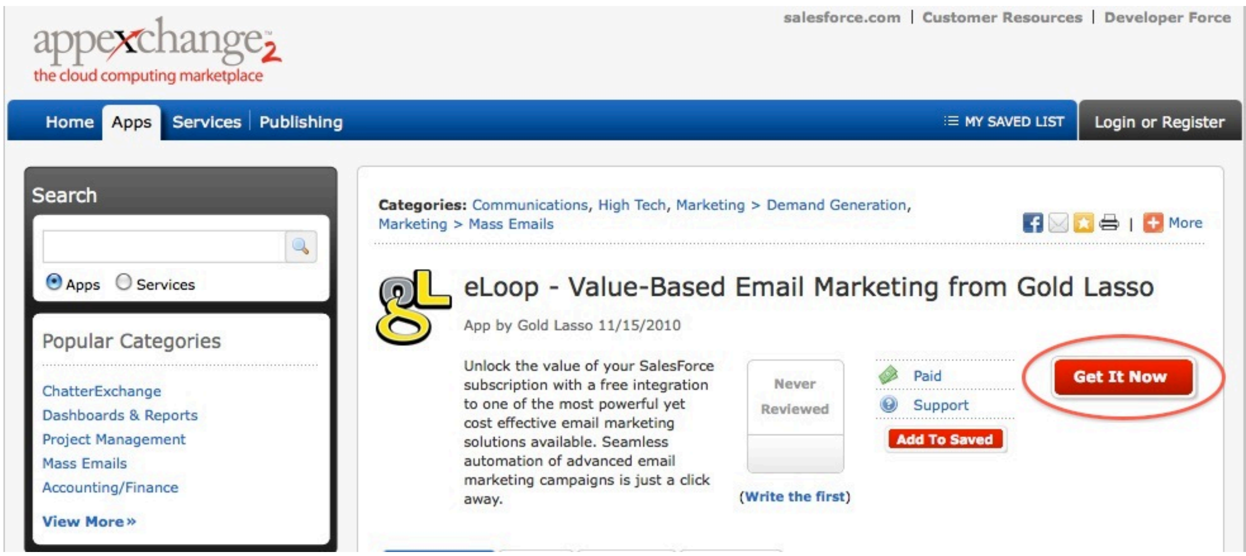
Installation Instructions

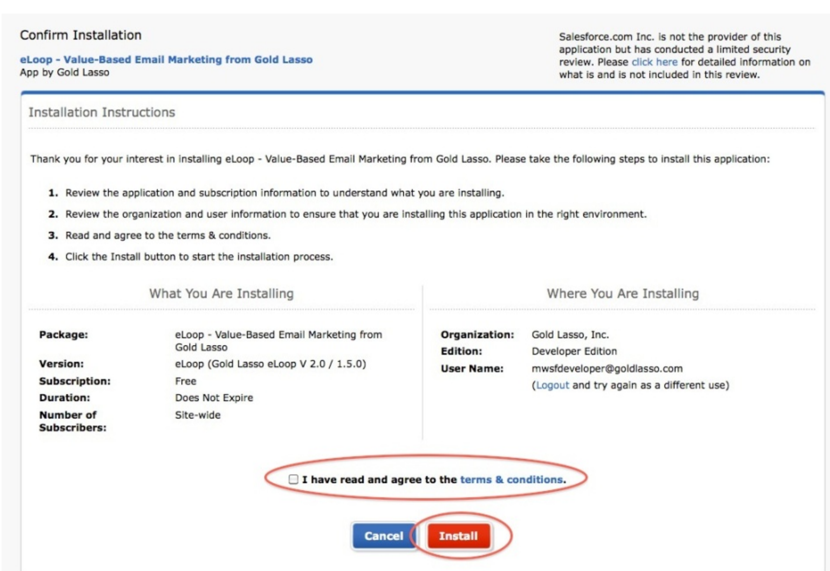
These steps will guide you through integrating your SalesForce account with eLoop. Once the package has been installed you will be able to send and measure your campaigns from SalesForce. Once you have completed your install, please see our How to Guide for instructions on getting started. If you have 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.



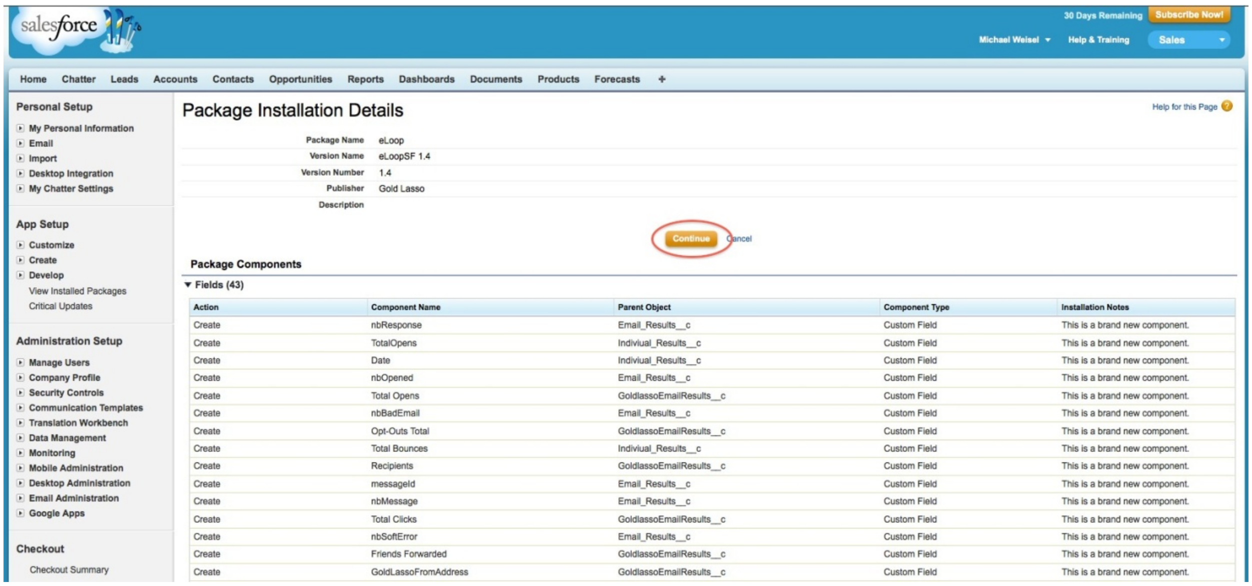
2. Enter your salesforce.com login and password to begin the package installation process.

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.

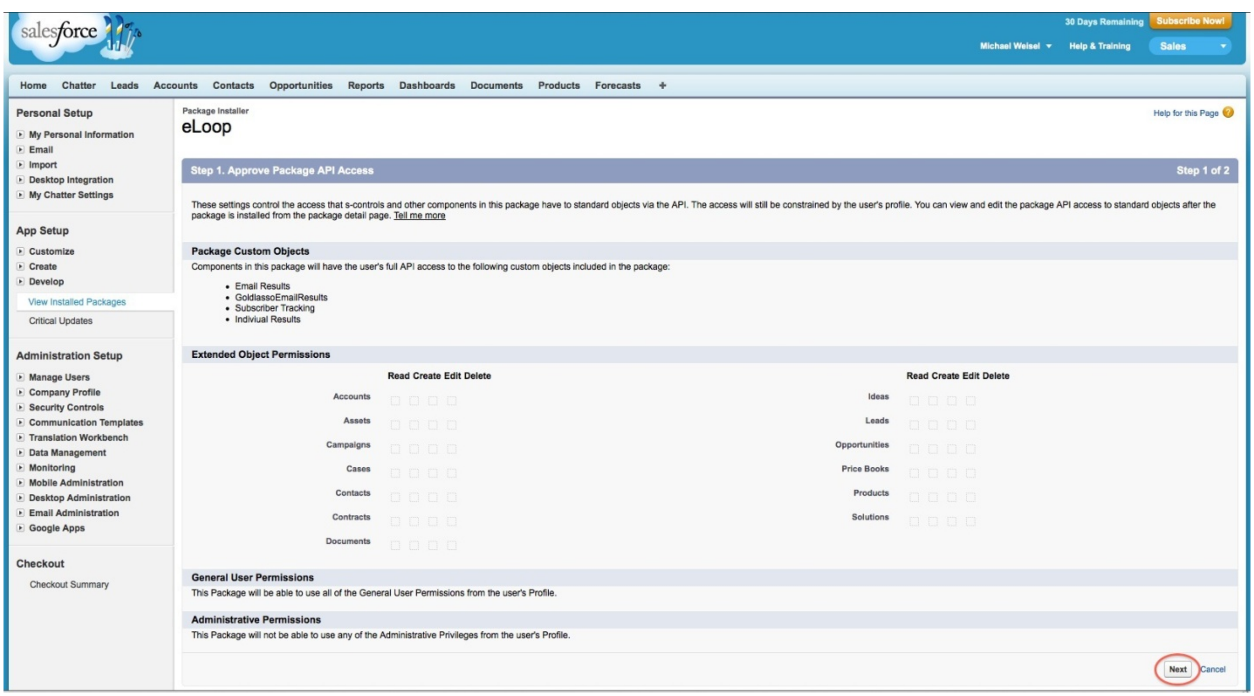


NOTE: This will bring up a dialog box to verify your password. Once you have verified your password click the "Submit" button to continue.

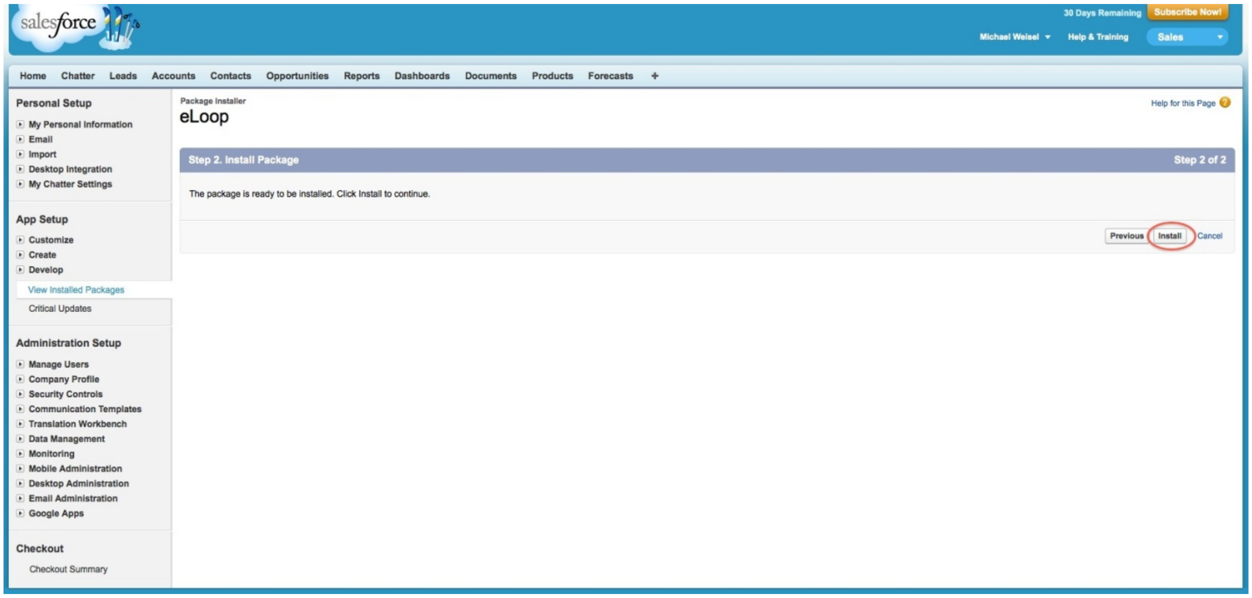
4. Click the "Continue" button once you have read the Installation Details.



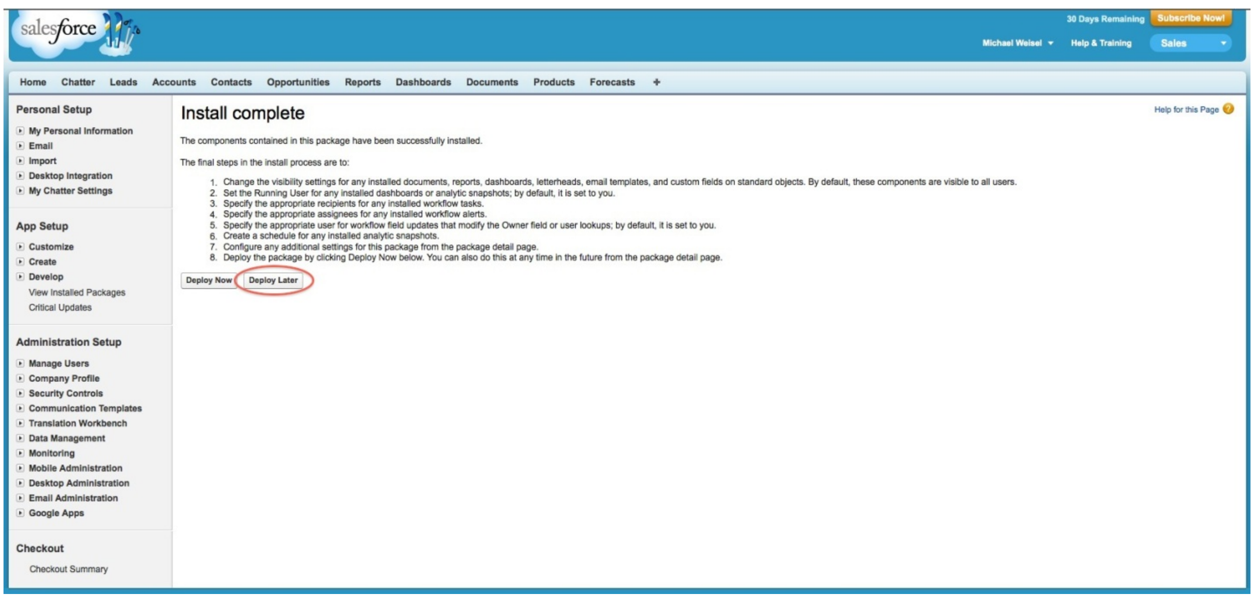
5. Click the "Next" button to approve the API access.



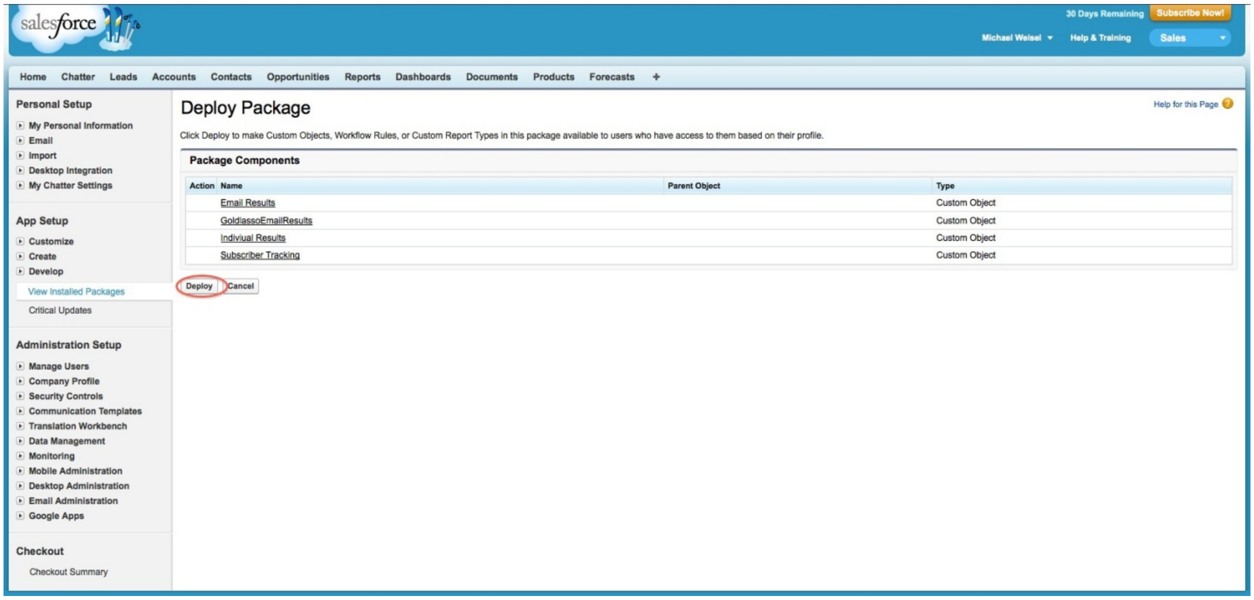
6. Click the “Install” button to install the package.



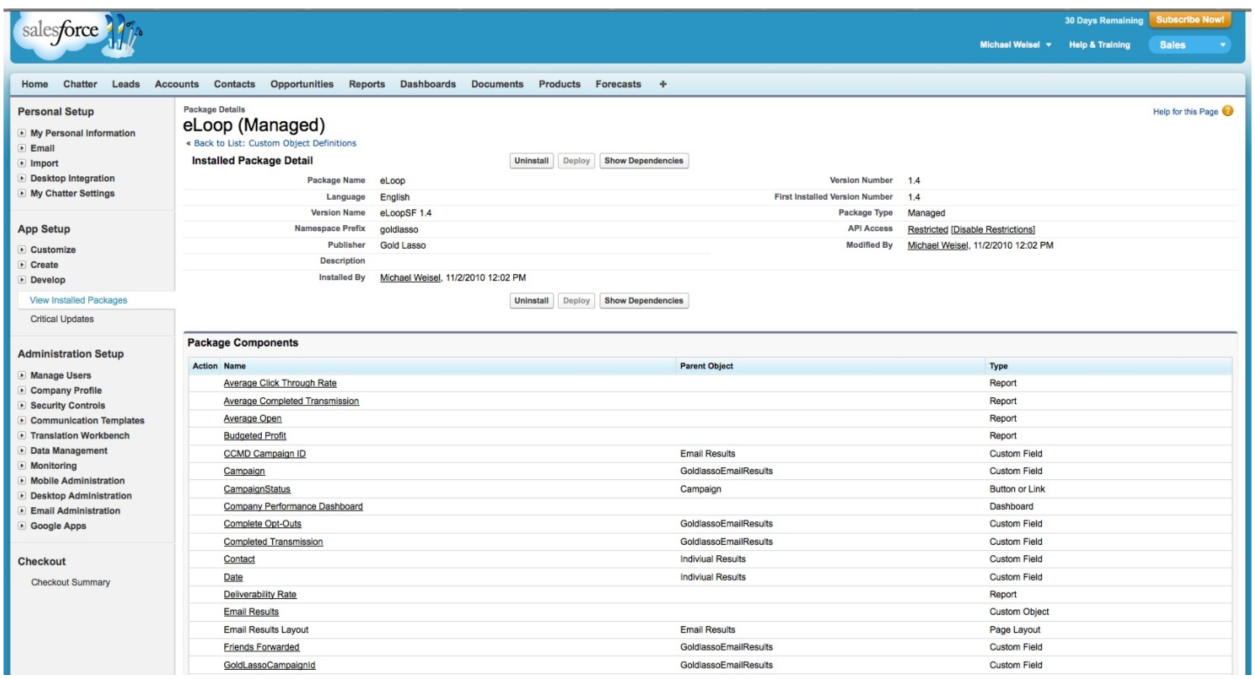
7. Click the “Deploy Now” button to perform the final steps in installing the Gold Lasso eLoop app.



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



NOTE: You will then see the following screen:



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.

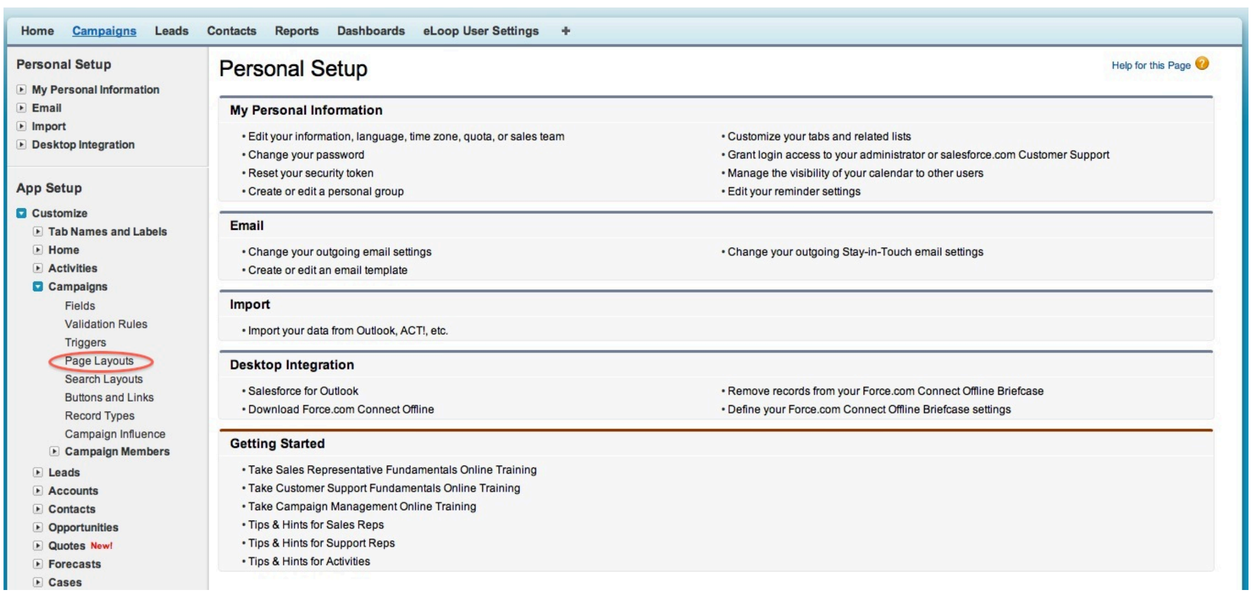
IMPORTANT: What type of SalesForce account do you have? There are two types of setups available. For Enterprise, Unlimited or Developer accounts use Quick Setup instructions. All other accounts should use Campaign Section Setup.

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.

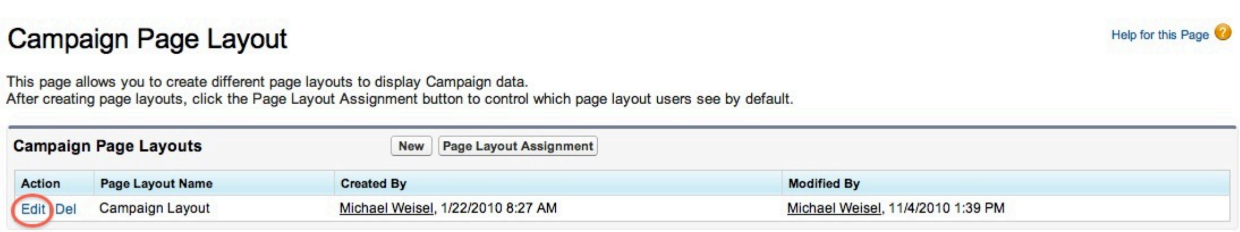
2. Under the "App Setup" section in the left column, choose the "Customize" option, and then choose the "Campaigns" option and finally the "Page Layout" option.



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

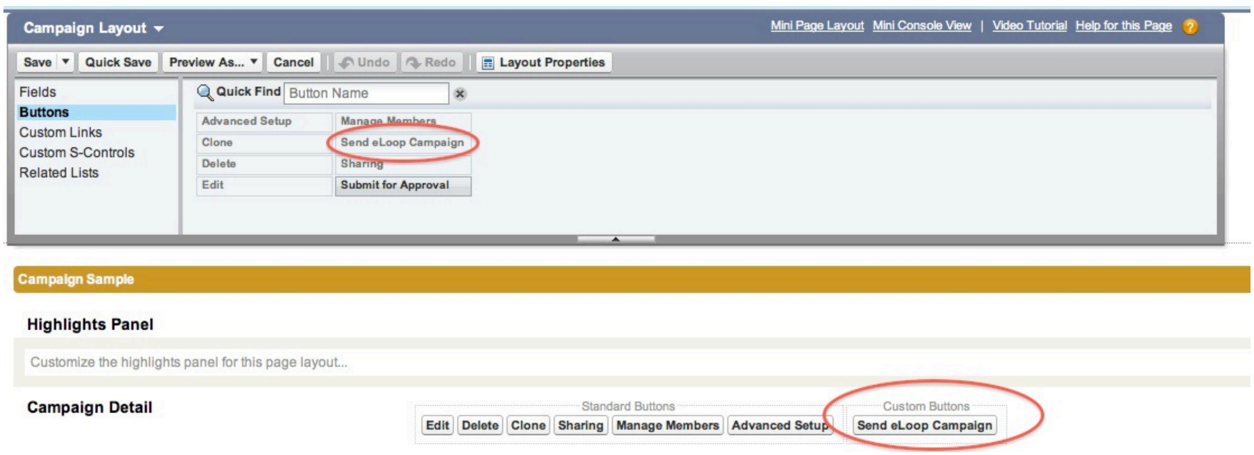
NOTE: The next step will only apply if you have other page layouts saved. If you are using a fresh account, skip to step 4.

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

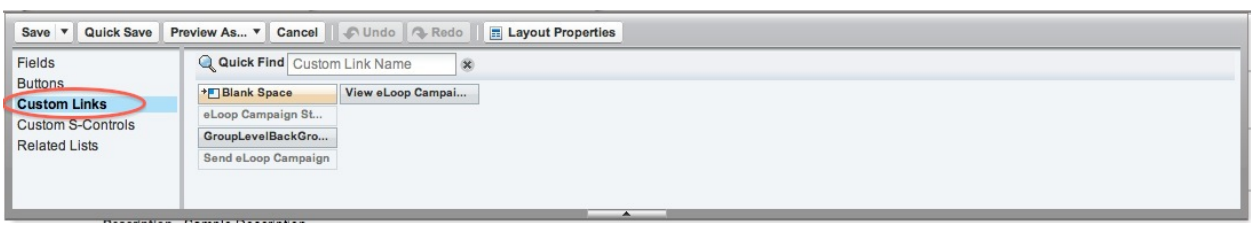


4. From the left navigation section within the campaign layout, choose the “Buttons” option to display the available buttons.

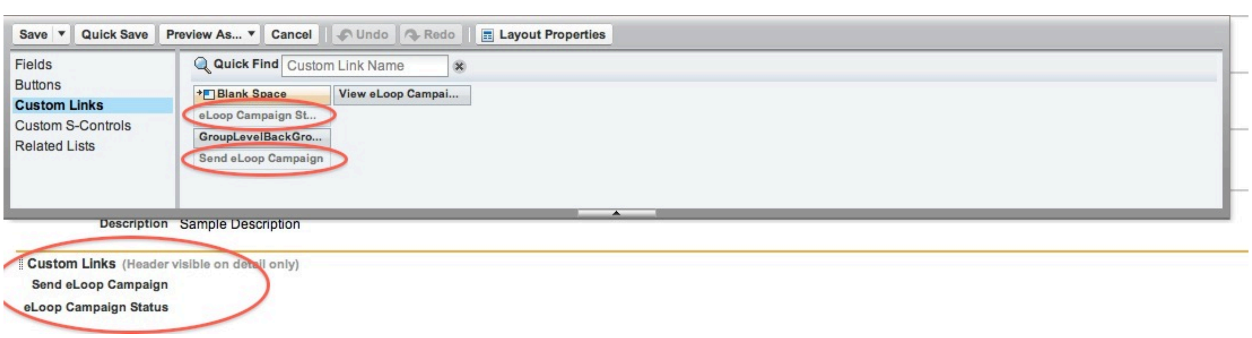
5. Select “Send eLoop Campaign” and drag it to the section labeled “Custom Buttons” located below the “Campaign Sample” bar.



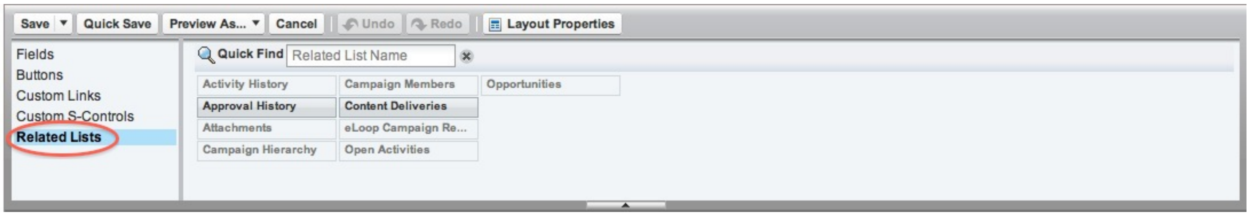
6. From the left navigation section within the campaign layout, choose the “Custom Links” option.



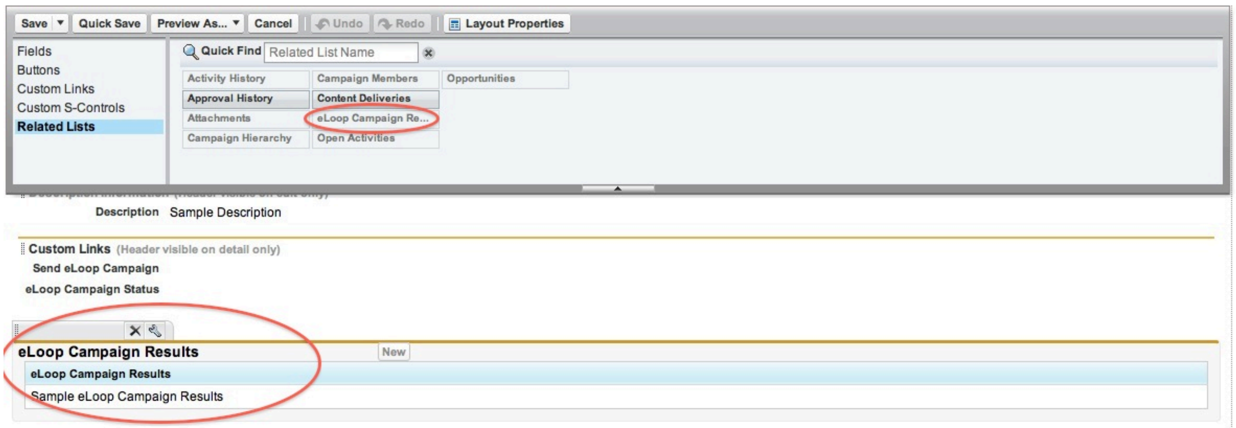
7. Select “Send eLoop Campaign” and “eLoop Campaign Status” and drag each of them to the “Custom Links” section.



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



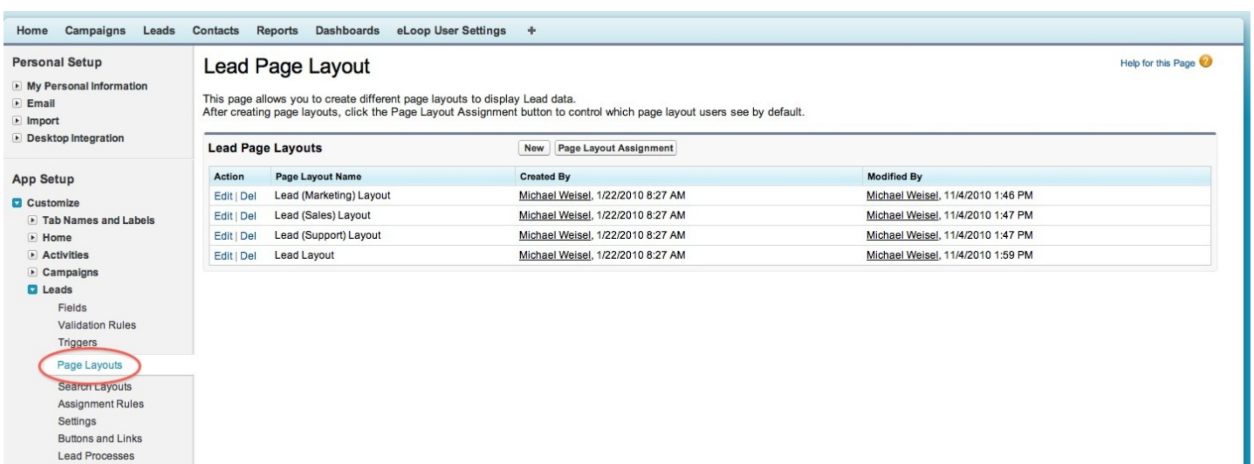
9. Select “eLoop Campaign Results” (some portions of the text may be cut off) and drag it to the section directly below the “Custom Links” section.



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

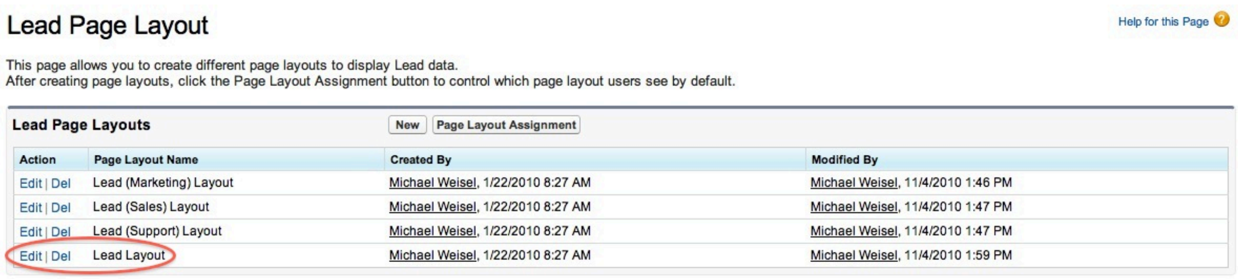
Leads Section Setup

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.



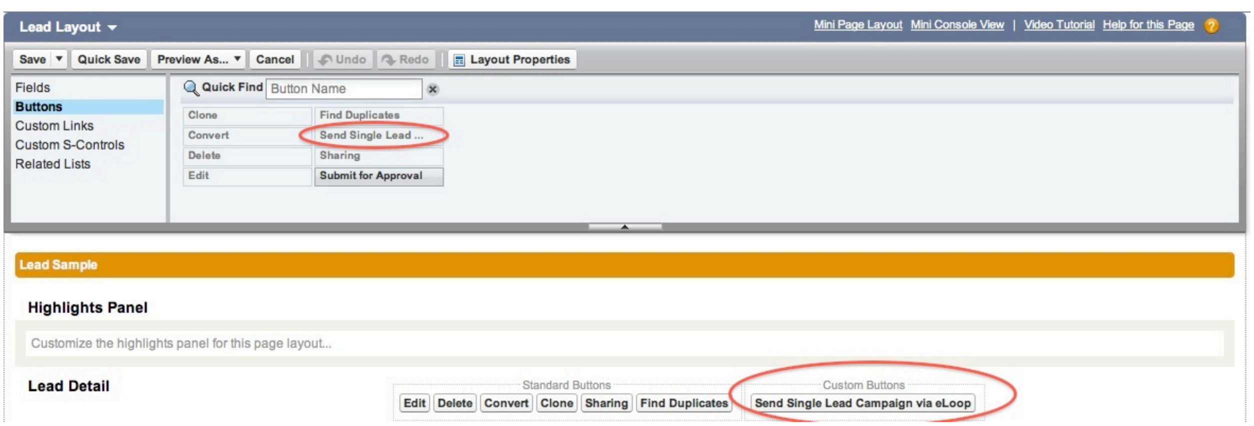
NOTE: Users with previously-saved layouts should follow this step. Users with fresh accounts should skip to step 12.

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

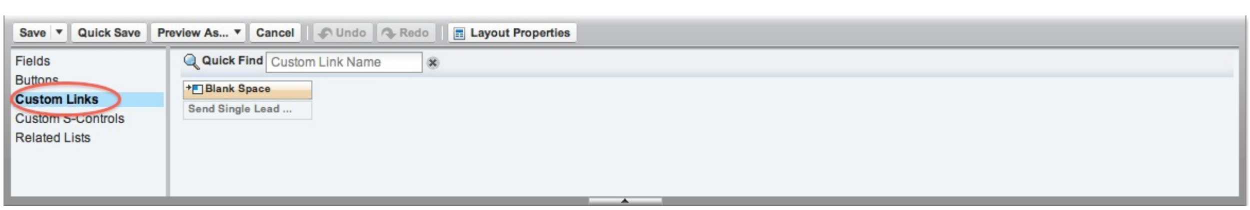


12. From the left navigation section within the lead layout, choose the “Buttons” option to display the available buttons.

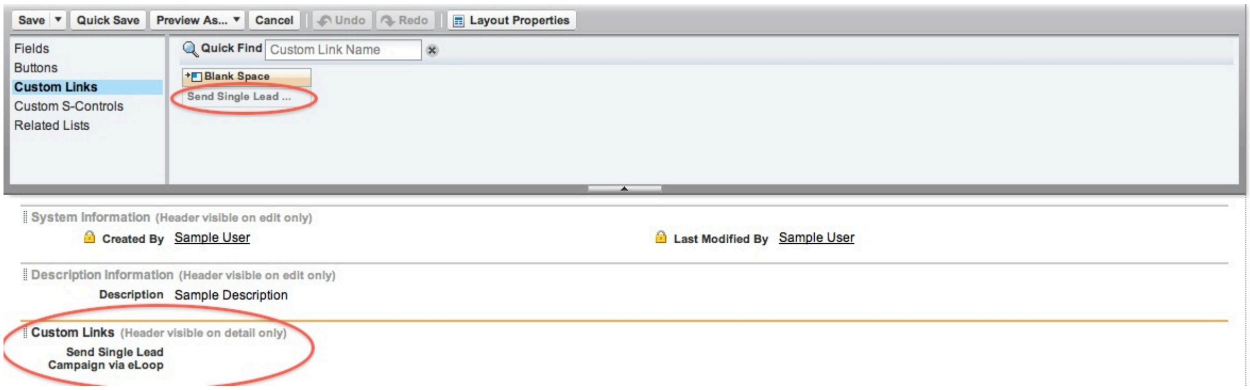
13. Choose “Send Single Lead eLoop Campaign” and drag it to the “Custom Buttons” section (some portions of the text may be cut off).



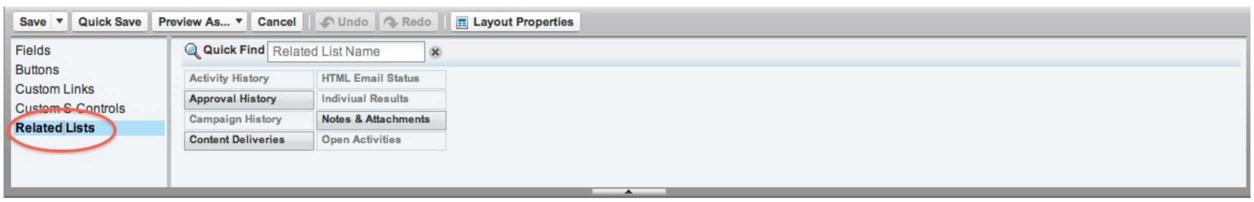
14. From the left navigation section within the lead layout, choose the “Custom Links” option.



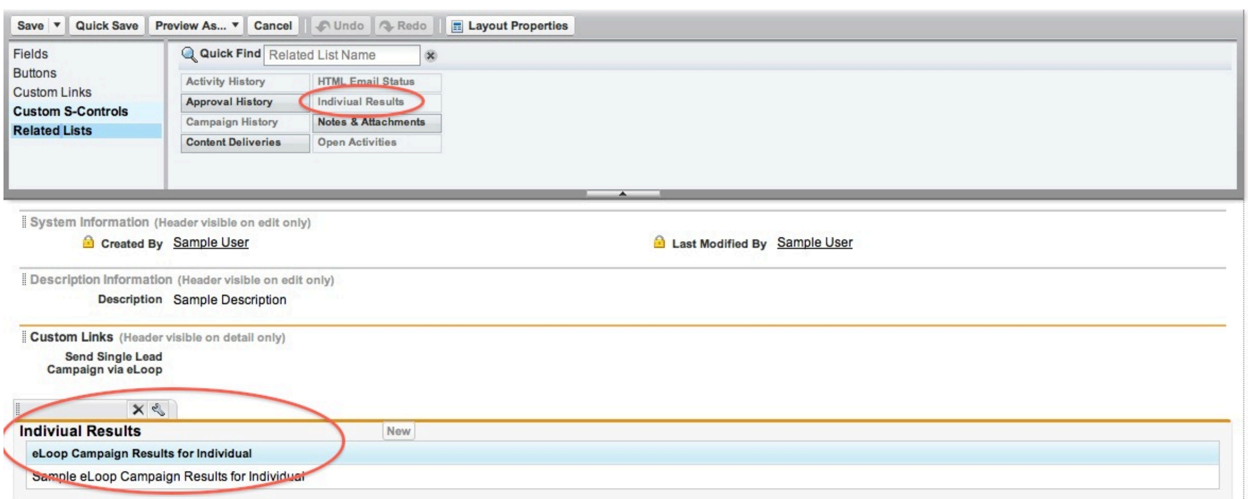
15. Select “Send Single eLoop Campaign” and drag it to the “Custom Links” section.



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.

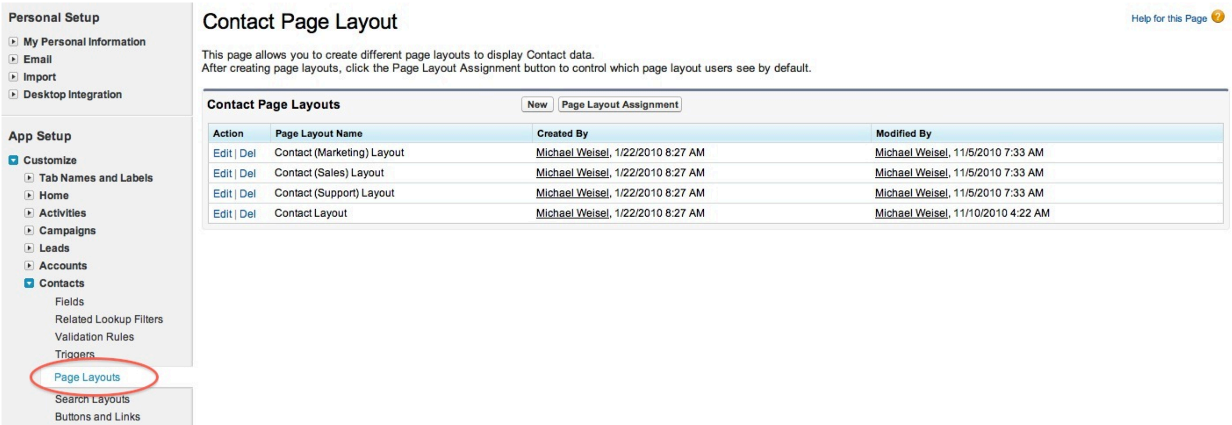


NOTE: When you’re dragging the object a green check box designates an area that the object can be placed.

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)

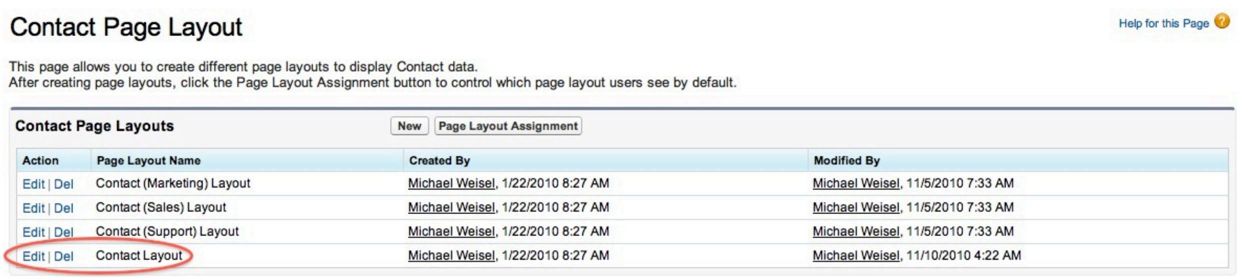
Contacts Section Setup

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

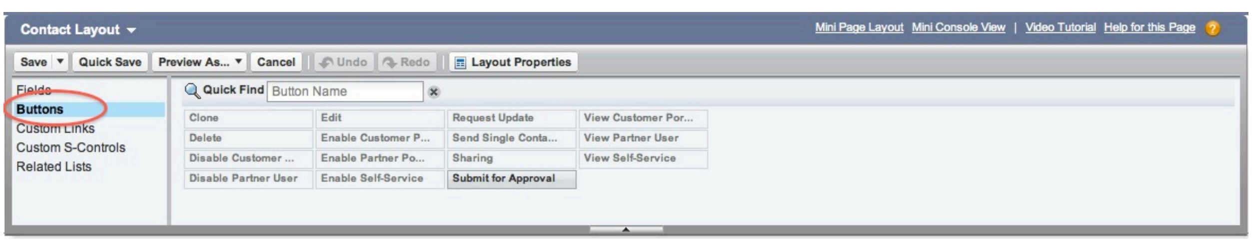


Note: Only users with previously-saved layouts will need to do this step. All others skip to step 20.

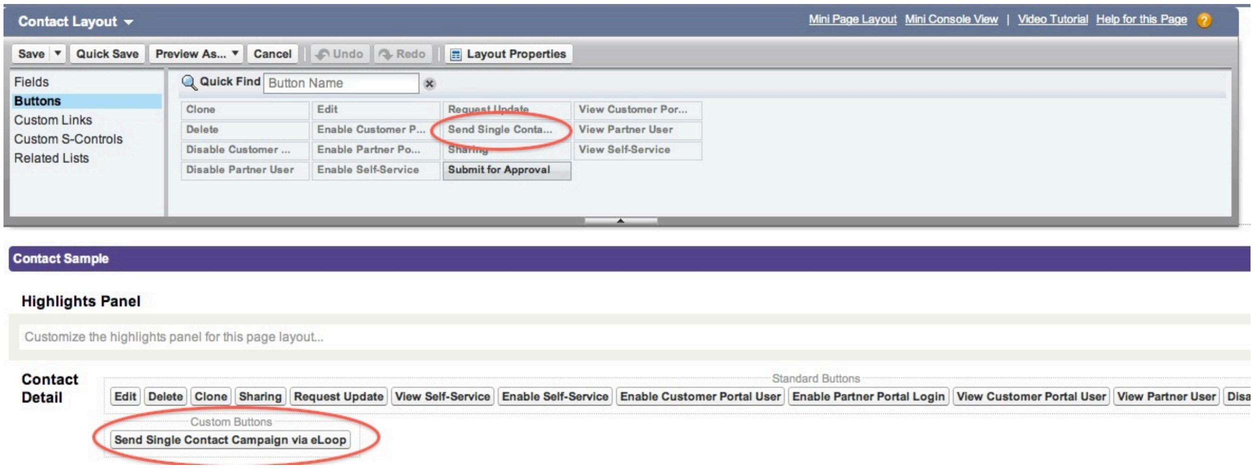
19. From the "Contact Page Layout" screen, choose the "Edit" option to edit the contact layout for the contact section.



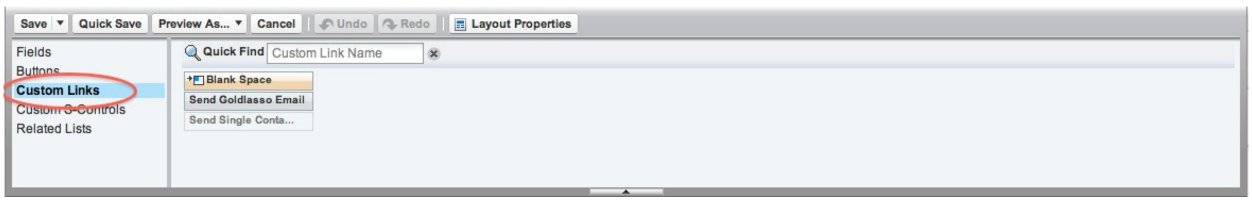
20. From the left navigation section within the lead layout, choose the "Buttons" option to display the available buttons.



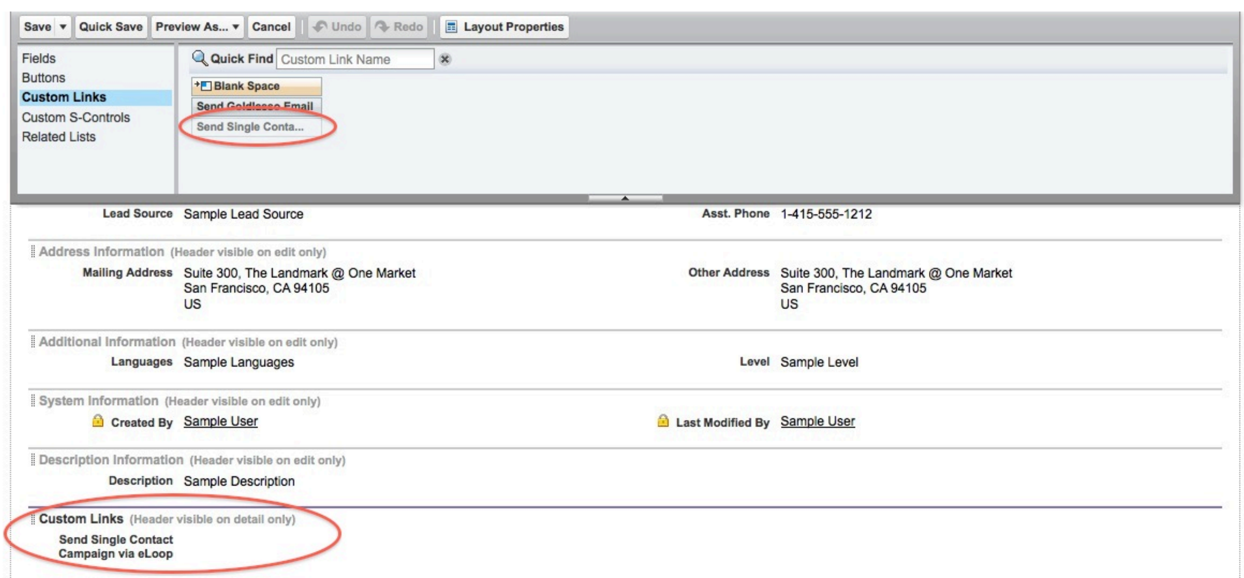
21. Choose “Send Single Campaign eLoop Campaign” and drag it to the “Custom Buttons” section (some portions of the text may be cut off).



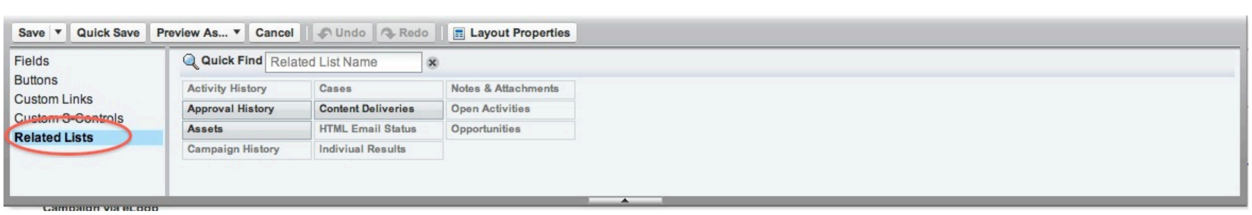
22. From the left navigation section within the contact layout, choose the “Custom Links” option.



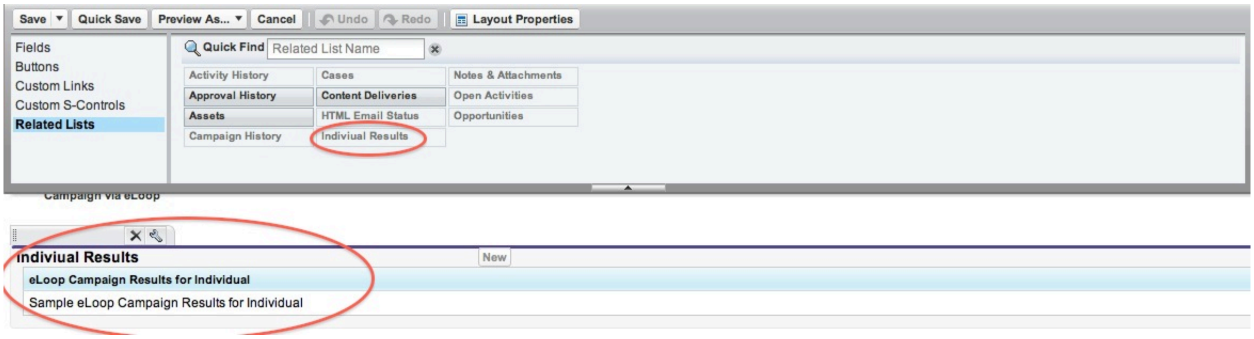
23. Choose “Send Single Contact eLoop Campaign” and drag it to the “Custom Links” section (some portions of the text may be cut off).



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.

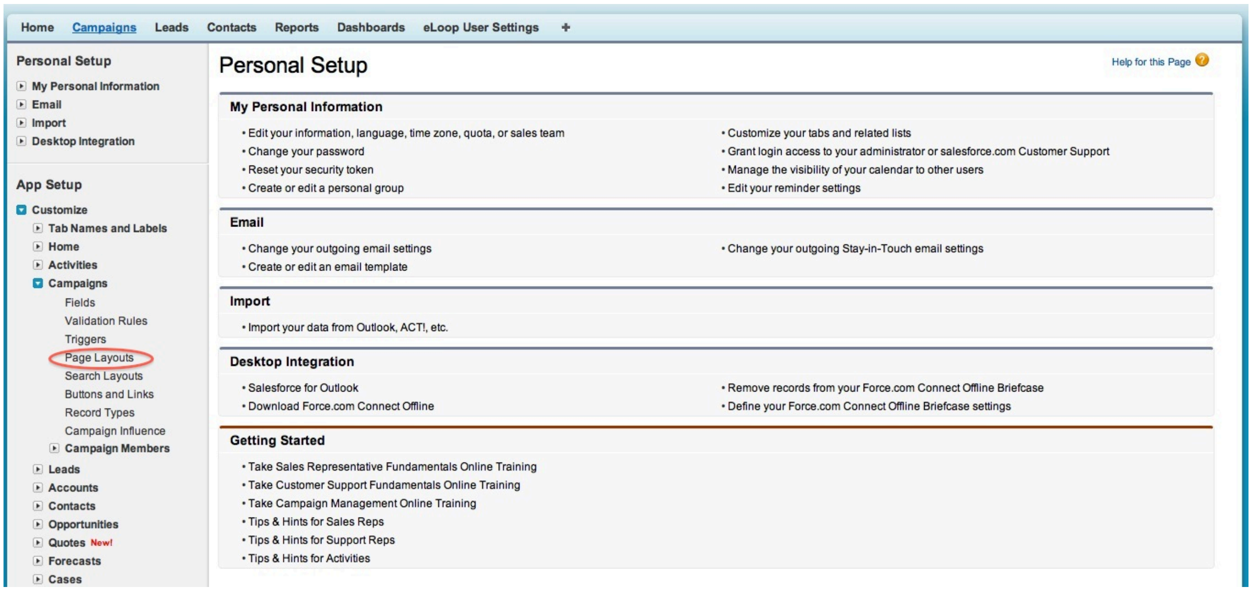
NOTE: Repeat steps 18 through 25 if you would like to customize the Leads section for Marketing, Sales, or Support (see image in step 18)

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

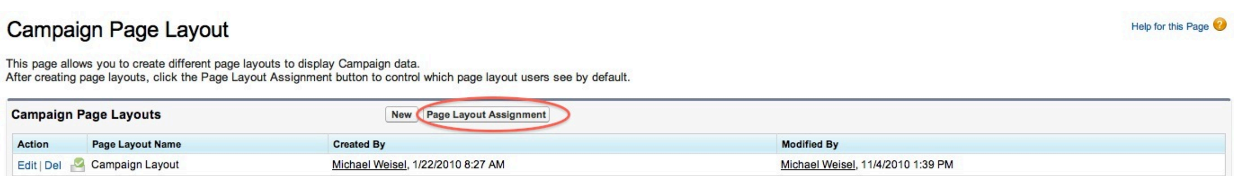
This type of setup should take approximately 5 minutes.

NOTE: If you have one of the other types of SalesForce Accounts, please go back to the section called "Campaign Section Setup".

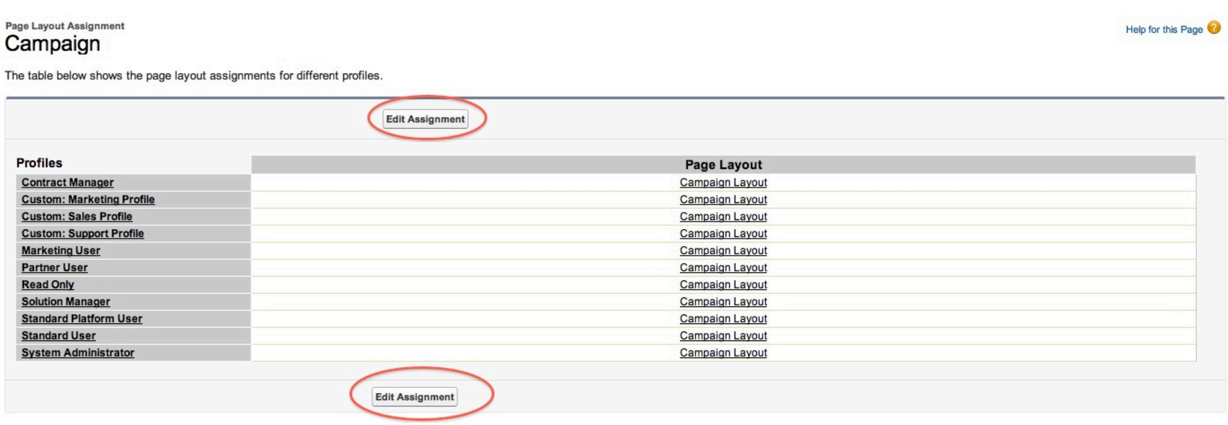
1. Under the "App Setup" section, choose the "Customize" option, and then choose the "Campaigns" option and finally the "Page Layout" option.



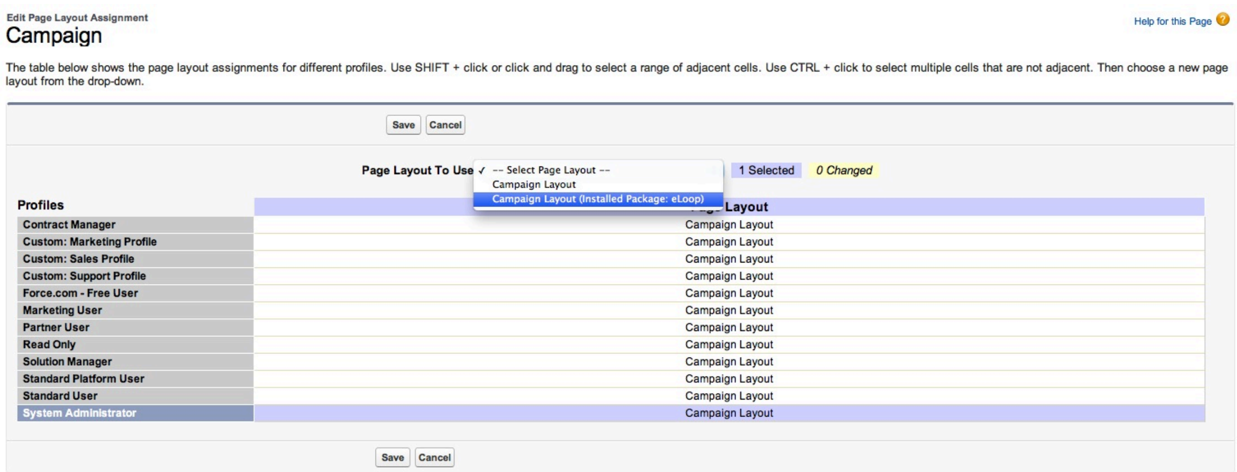
2. From the Campaign Page Layout screen choose the "Page Layout Assignment" button located at the top.



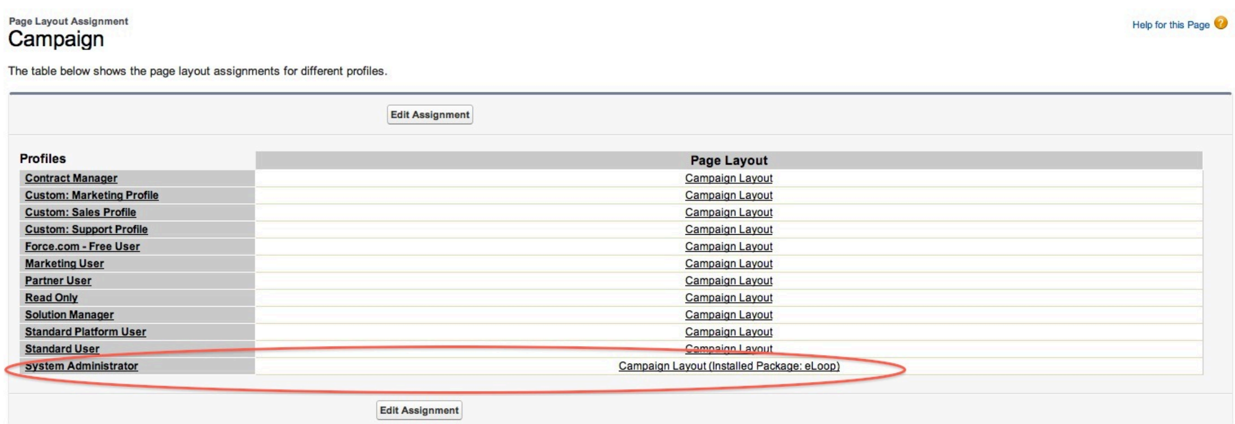
3. Once the Profiles page appears, click the "Edit Assignment" button to continue.



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).



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



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.