SALESFORCE INSTALLATION & CUSTOMIZATION

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SALESFORCE INSTALLATION & CUSTOMIZATION

Welcome to VerticalResponse for Salesforce! Installation is easy; this guide will walk you through the 3 simple steps to install our application.

We provide self-service email, social media and event marketing solutions for Salesforce clients. Build mailing lists, send emails or invitations to Leads and Contacts & track the post-launch reporting within your Salesforce account.

How to use this guide:

Simply follow the installation and customization steps to create your new account.

1 Visit the AppExchange and Get It Now

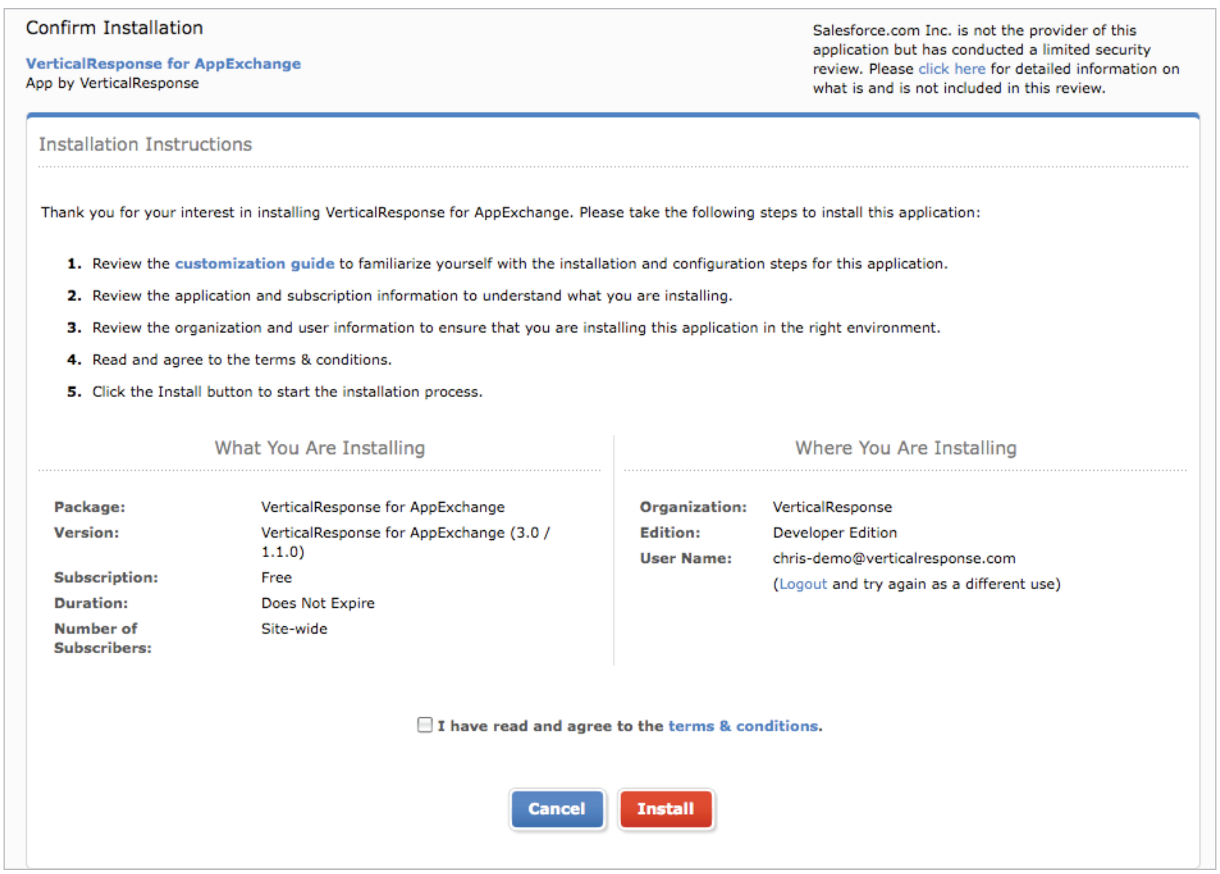
STEP 1: Go to the [VerticalResponse listing on the Salesforce AppExchange]

STEP 2: Click "Get It Now." Provide your contact information and click Submit

STEP 3: Enter your Salesforce Username, Password and select whether you're a Salesforce Administrator, Salesforce User or a Free 30 Day Trial User. When finished, click Continue.

STEP 4: Select if you would like to install the app in your Production (including Developer Edition) or if applicable, into your Sandbox. Once you've read through the Salesforce Terms of Service, click on Continue.

Group Edition users: Please use this link to set up your integration.

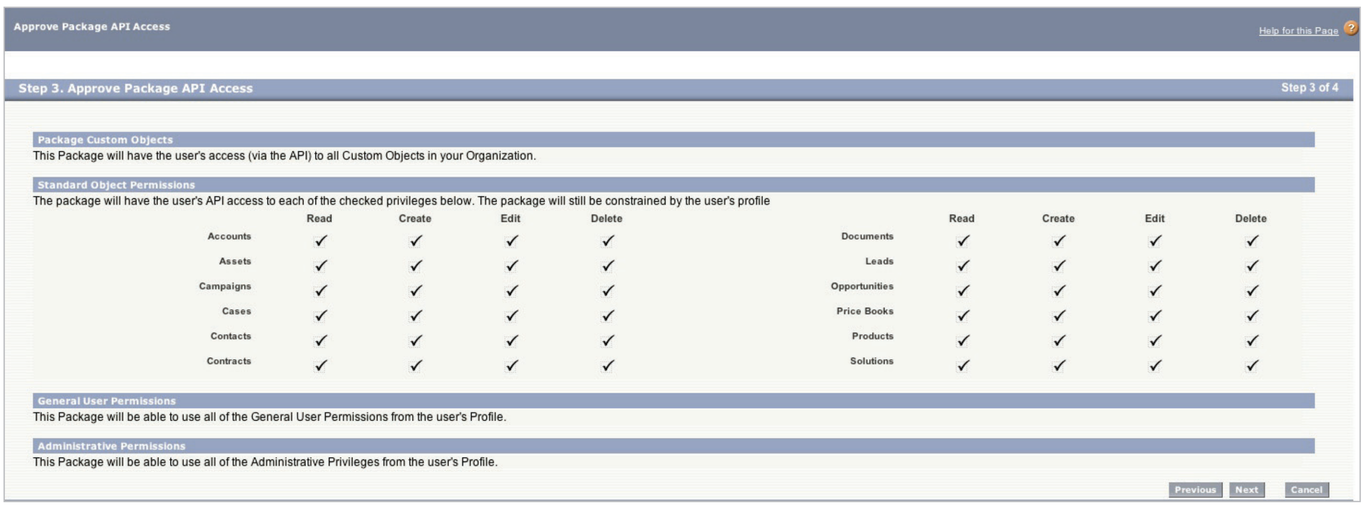


2 Review Package Components, Set Security Levels & Install

Before installing, you will have the option to review all the components of VerticalResponse for Salesforce. The package name, version, and description will also be noted. Simply click "Next" to proceed.

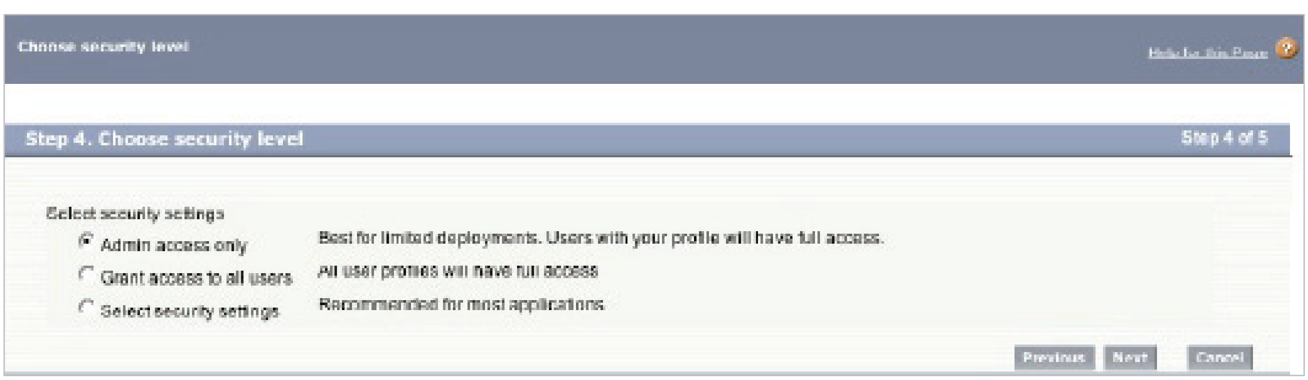
VerticalResponse for Salesforce requires access to your Salesforce objects through the API.

Please review and approve the required access by clicking on "Next."



Choose security levels to determine which user profiles can access VerticalResponse for Salesforce.

Please review and approve the required access by clicking on "Next."



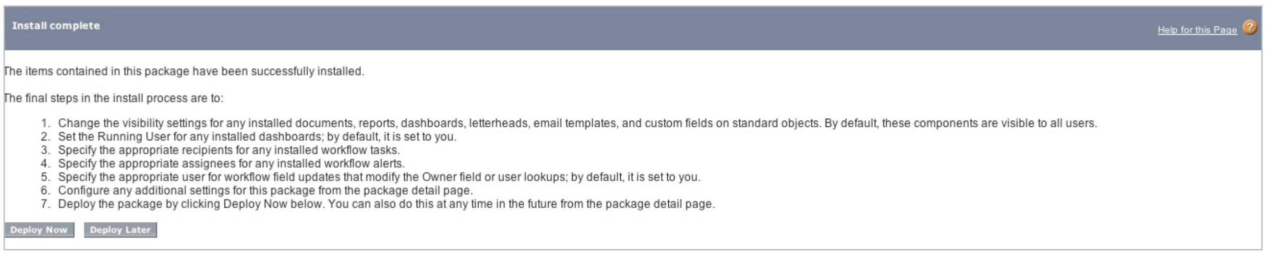
Now you're ready to finalize the installation.

Just click the "Install" button and VerticalResponse for Salesforce will be added into your Salesforce account.

3 Completing the Installation and Exposing Custom Objects

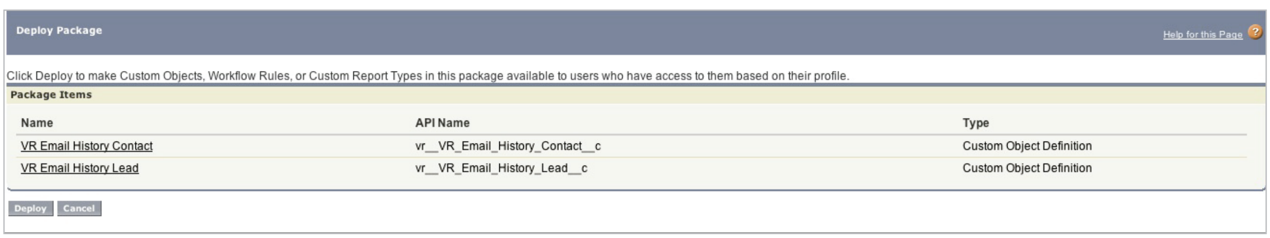
Now that the application has been installed:

You have the option to immediately deploy the Custom Object components or choose to customize them first before rolling them out.



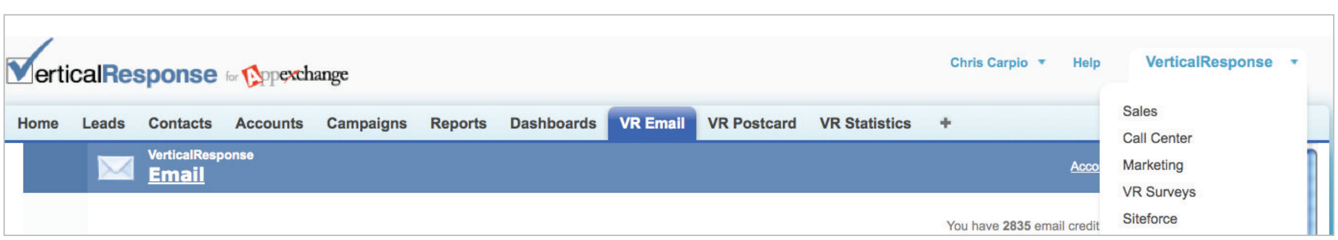
To deploy the Custom Objects now:

If you choose to deploy the Custom Objects now, you will see a listing for two reporting objects: **VR Email History Lead** and **VR Email History Contact**. To proceed, simply click "Deploy."



You're almost done!

You've now completed the initial installation of VerticalResponse for Salesforce and you will see a summary screen that displays the application details. In addition, "VerticalResponse" now appears in the AppExchange drop-down menu in the upper right-hand corner of your Salesforce account.



Now it's time to edit your Lead and Contact Page Layouts to expose the VerticalResponse Custom Objects. Simply follow the steps below to complete the installation process.

Adding *VR Email History Lead* to the Leads Page Layout

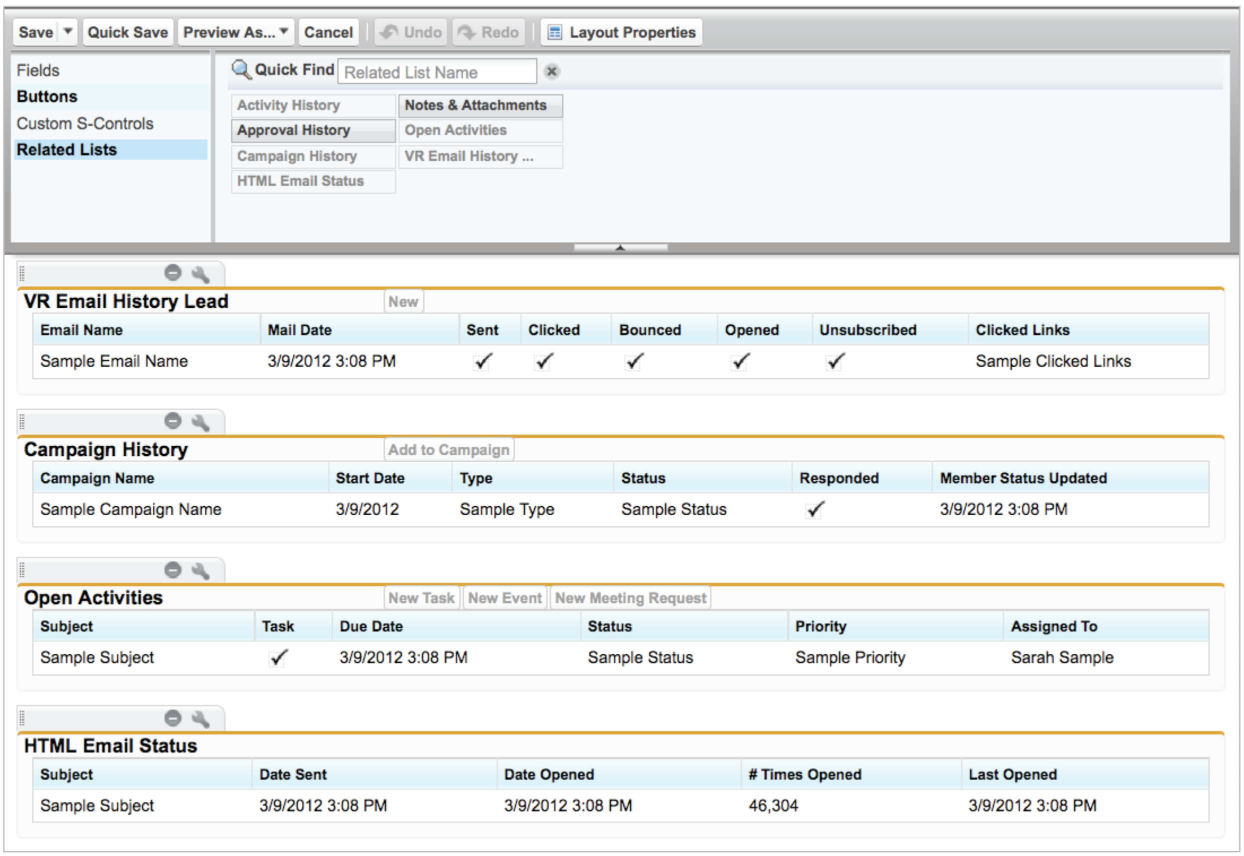
STEP 1: Go to: Setup > App Setup > Customize > Leads > Page Layouts.

STEP 2: Choose your Page Layout and then click "Edit."

STEP 3: Select "Related Lists" from the menu at the top and locate ***VR Email History Lead***.

STEP 4: Drag the ***VR Email History Lead*** into the page layout.

STEP 5: Click "Save" in the top left corner.

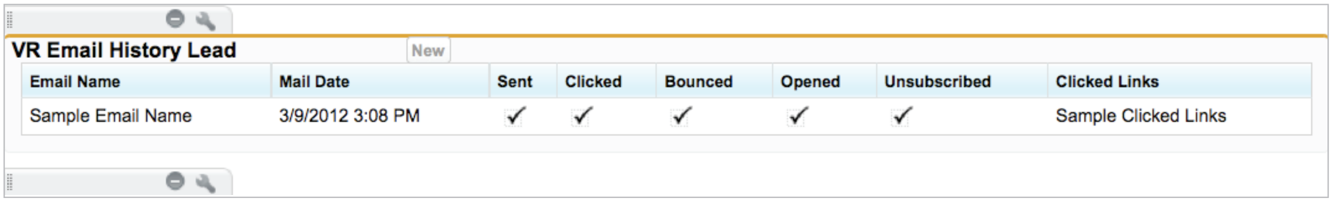


Customizing the List View Display for *VR Email History Lead*

STEP 1: Find the ***VR Email History Lead*** section within the Related Lists section.

STEP 2: Click the Wrench icon.

STEP 3: Customize your list view display for Leads.



NOTE: We recommend the following display fields:

- Email Name (default)
- Mail Date
- Sent
- Bounced
- Opened
- Clicked
- Unsubscribed
- Last Modified By

STEP 4: When finished, click "OK" and then "Save" in the top left corner of the Lead Layout page.

Add *VR Email History Contact* to the Contacts Page Layout

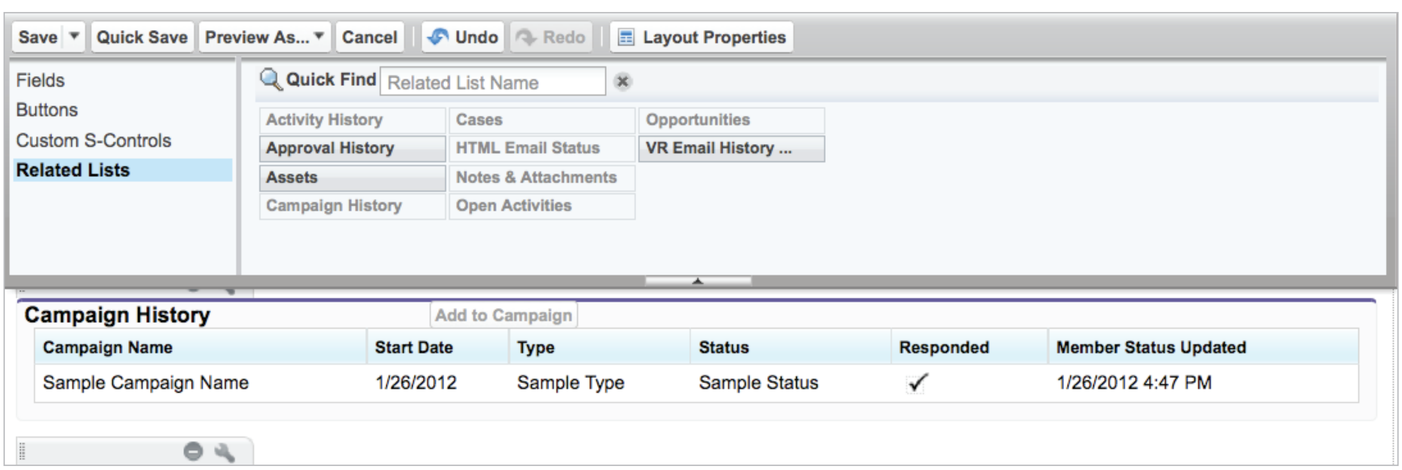
STEP 1: Go to: Setup > App Setup > Customize > Contacts > Page Layouts.

STEP 2: Choose your Page Layout and then click "Edit."

STEP 3: Select "Related Lists" from the drop-down menu and locate ***VR Email History Contact***.

STEP 4: Drag the ***VR Email History Contact*** into the page layout.

STEP 5: Click "Save" in the top left corner.



Customizing the List View Display for *VR Email History Contact*

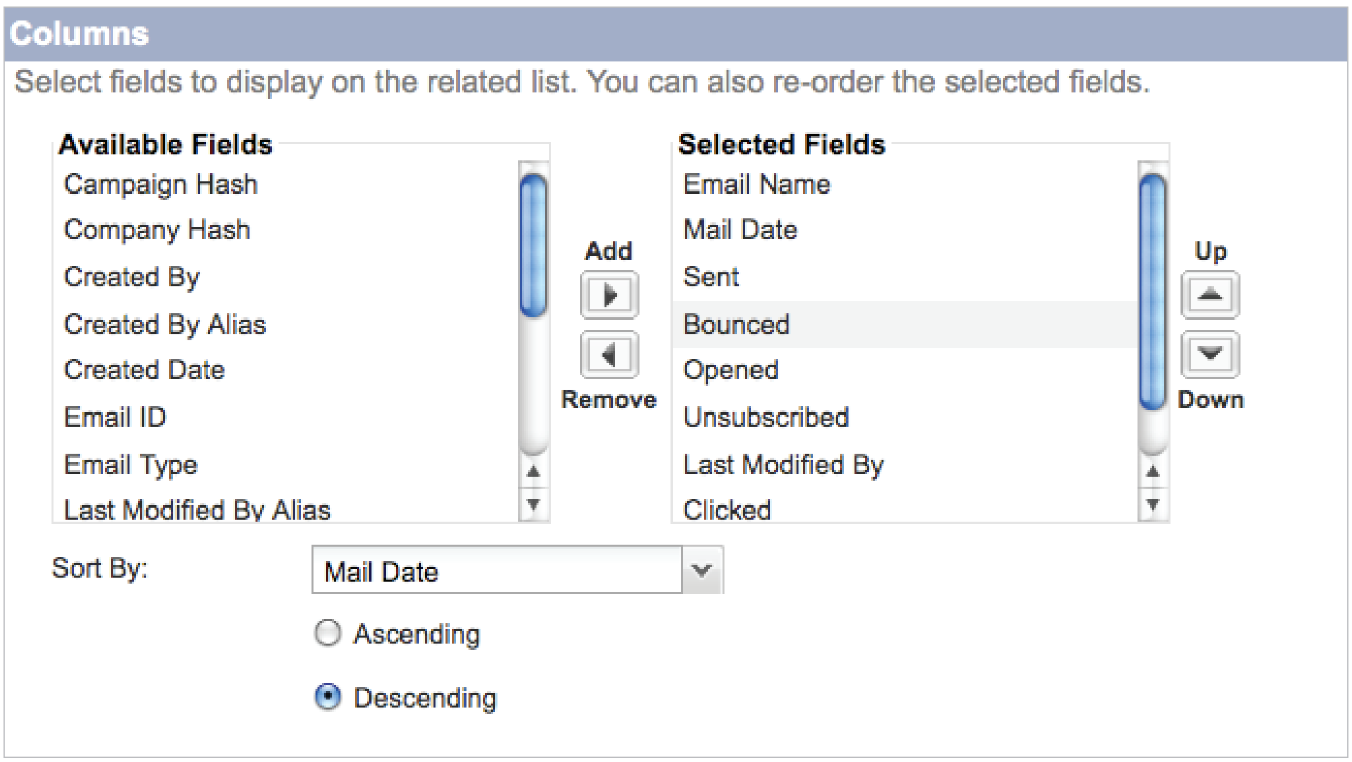
STEP 1: Find the ***VR Email History Contact*** section within the Related Lists section

STEP 2: Click the Wrench icon.

STEP 3: Customize your list view display for Contacts.

NOTE: We recommend the following display fields:

- Email Name (default)
- Mail Date
- Sent
- Bounced
- Opened
- Clicked
- Unsubscribed
- Last Modified By



STEP 4: When finished, click "OK" and then "Save" in the top left corner of the Lead Layout page.

That's all there is to it! You should now see VR Email History in the custom object section of your Leads and Contacts.

For help getting started with VerticalResponse we offer a recorded demo. **Click here to view now**.

Or, check out our **videos and text tutorials** on our help site to get started.