

SALESFORCE INSTALLATION & CUSTOMIZATION

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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

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.

Confirm Installation

VerticalResponse for AppExchange
App by VerticalResponse

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Installation Instructions

Thank you for your interest in installing VerticalResponse for AppExchange. Please take the following steps to install this application:

1. Review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.
2. Review the application and subscription information to understand what you are installing.
3. Review the organization and user information to ensure that you are installing this application in the right environment.
4. Read and agree to the terms & conditions.
5. Click the Install button to start the installation process.

What You Are Installing	Where You Are Installing
Package: VerticalResponse for AppExchange	Organization: VerticalResponse
Version: VerticalResponse for AppExchange (3.0 / 1.1.0)	Edition: Developer Edition
Subscription: Free	User Name: chris-demo@verticalresponse.com (Logout and try again as a different use)
Duration: Does Not Expire	
Number of Subscribers: Site-wide	

I have read and agree to the [terms & conditions](#).

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.

Examine package contents Help for this Page ?

Step 2. Examine package contents Step 2 of 5

Package Name: VerticalResponse for AppExchange
 Version: 3.0
 Publisher: VerticalResponse
 Description: VerticalResponse for AppExchange provides self-service email & direct mail solutions. Create custom mailing lists of any size, design professional sales & marketing campaigns and track post-launch statistics.

Installation includes:

Action	Item Name	Item Type	Installation Notes
Create	VerticalResponse	Custom App	This is a brand new item.
Create	VR Email History Contact	Custom Object Definition	This is a brand new item.
Create	VR Email History Lead	Custom Object Definition	This is a brand new item.

VerticalResponse for Salesforce requires access to your Salesforce objects through the API. Please review and approve the required access by clicking on “Next.”

Approve Package API Access Help for this Page ?

Step 3. Approve Package API Access Step 3 of 4

Package Custom Objects
 This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Standard Object Permissions
 The package will have the user's API access to each of the checked privileges below. The package will still be constrained by the user's profile

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Documents	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions
 This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
 This Package will be able to use all of the Administrative Privileges from the user's Profile.

Previous Next Cancel

Choose security levels to determine which user profiles can access VerticalResponse for Salesforce. Please review and approve the required access by clicking on “Next.”

Choose security level Help for this Page ?

Step 4. Choose security level Step 4 of 5

Select security settings

- Admin access only Best for limited deployments. Users with your profile will have full access.
- Grant access to all users All user profiles will have full access
- Select security settings Recommended for most applications

Previous Next Cancel

Now you're ready to finalize the installation.

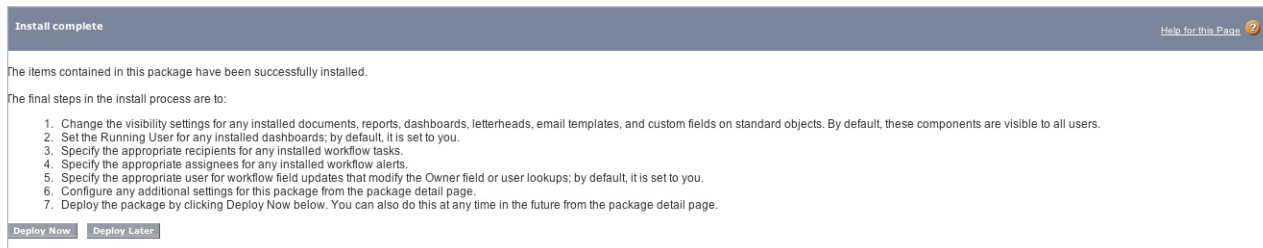
Just click the "Install" button and VerticalResponse for Salesforce will be added into your Salesforce account.



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.



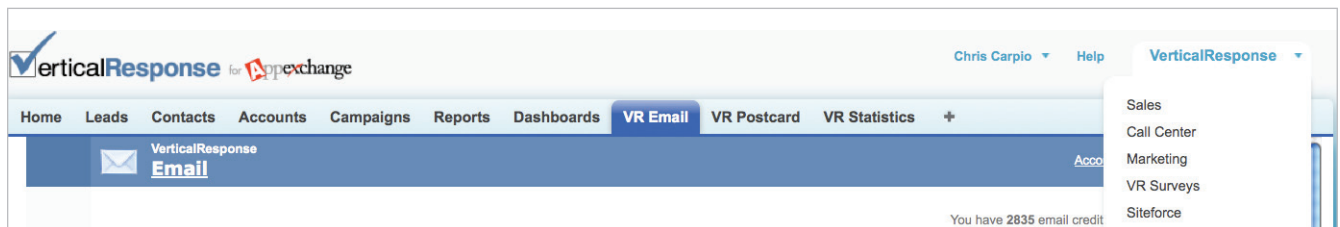
To deploy the Custom Objects now:

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.

The screenshot shows the Salesforce Page Layout Editor interface. The top navigation bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The left sidebar shows 'Fields' with categories: 'Buttons', 'Custom S-Controls', and 'Related Lists'. The 'Related Lists' category is selected, and a 'Quick Find' search box is active. Below the search box, a grid of related list options is displayed, including 'Activity History', 'Approval History', 'Campaign History', 'HTML Email Status', 'Notes & Attachments', 'Open Activities', and 'VR Email History ...'. The 'VR Email History Lead' widget is selected and placed on the page layout. Below the widget, a table displays the data for the selected lead.

Email Name	Mail Date	Sent	Clicked	Bounced	Opened	Unsubscribed	Clicked Links
Sample Email Name	3/9/2012 3:08 PM	✓	✓	✓	✓	✓	Sample Clicked Links

Below the 'VR Email History Lead' widget, the 'Campaign History' widget is visible, showing a table with columns: Campaign Name, Start Date, Type, Status, Responded, and Member Status Updated.

Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Sample Campaign Name	3/9/2012	Sample Type	Sample Status	✓	3/9/2012 3:08 PM

Below the 'Campaign History' widget, the 'Open Activities' widget is visible, showing a table with columns: Subject, Task, Due Date, Status, Priority, and Assigned To.

Subject	Task	Due Date	Status	Priority	Assigned To
Sample Subject	✓	3/9/2012 3:08 PM	Sample Status	Sample Priority	Sarah Sample

Below the 'Open Activities' widget, the 'HTML Email Status' widget is visible, showing a table with columns: Subject, Date Sent, Date Opened, # Times Opened, and Last Opened.

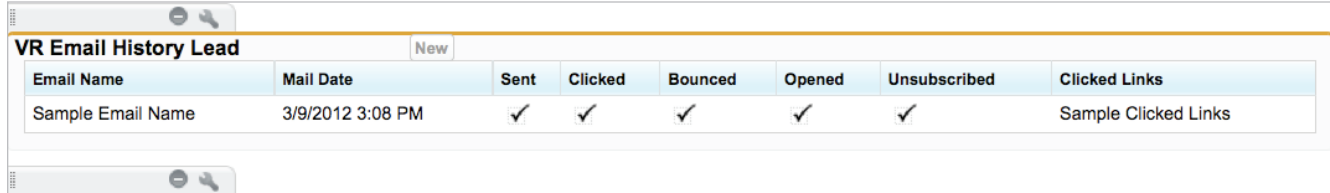
Subject	Date Sent	Date Opened	# Times Opened	Last Opened
Sample Subject	3/9/2012 3:08 PM	3/9/2012 3:08 PM	46,304	3/9/2012 3:08 PM

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.



Email Name	Mail Date	Sent	Clicked	Bounced	Opened	Unsubscribed	Clicked Links
Sample Email Name	3/9/2012 3:08 PM	✓	✓	✓	✓	✓	Sample Clicked Links

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

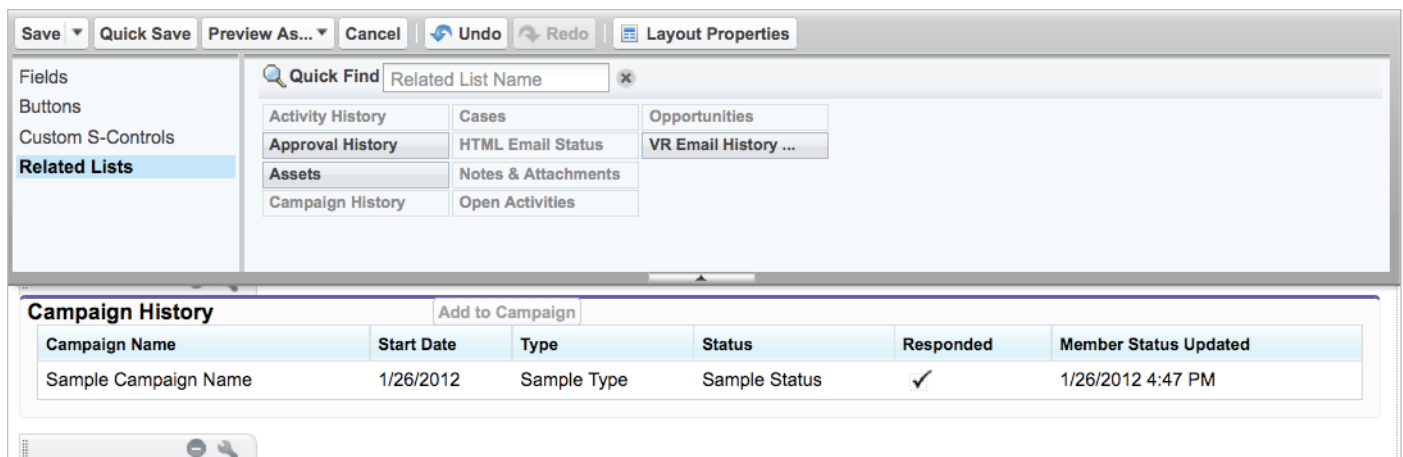
STEP 1: Go to: Setup > App Setup > Customize > Contacts > Page Layouts.

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.



Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Sample Campaign Name	1/26/2012	Sample Type	Sample Status	✓	1/26/2012 4:47 PM

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

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields
Campaign Hash	Add  Remove 	Email Name
Company Hash		Mail Date
Created By		Sent
Created By Alias		Bounced
Created Date		Opened
Email ID		Unsubscribed
Email Type		Last Modified By
Last Modified By Alias		Clicked
		Up  Down 

Sort By: Mail Date ▼

Ascending
 Descending

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.