# Installation, Customization and Upgrade Guide

www.myfax.com

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## Thank you for choosing MyFax for AppExchange 2.

In a web-based world, MyFax is the perfect way to send and receive faxes using your email, web, smart phone, and now Salesforce CRM. A MyFax account lets you get rid of clunky fax machines and servers, expensive phone lines, paper, toner, and maintenance.

This installation guide is tailored to the Salesforce CRM Administrator who will be installing the App within their Salesforce CRM Org. For more information on sending and receiving faxes using MyFax for AppExchange 2, please read the "MyFax for AppExchange 2 User Guide".

## In this guide you will learn:

- Where to find MyFax on AppExchange 2
- How to install the MyFax Package on your Salesforce CRM Org
- How to customize Layouts and Access privileges for the MyFax App
- How to configure Fax Reception
- Where to enable App settings, merge rules and dynamic billing codes to best meet your fax sending needs
- How users and administrators access the MyFax App
- How to Upgrade to the latest version of MyFax for AppExchange 2

## With MyFax for AppExchange 2 you can:

- Send a fax securely to leads or contacts
- Fax a document saved on your desktop or saved in Salesforce CRM.
- Review information about sent faxes in the contact's Open Activities, Activity History, MyFax Sent Faxes or MyFax Received Faxes
- Receive faxes securely and assign them as Salesforce CRM tasks or associate with Contacts/Leads/Cases
- Use Merge Templates to send customized faxes to one or multiple recipients
- Send Mass Fax & Email
- Run administrative reports

## Browser Support of MyFax for AppExchange 2

As of Winter '11 release, official browser support for by Salesforce CRM, and therefore MyFax for AppExchange 2, includes:

- Mozilla Firefox version 3.6.x
- Microsoft® Internet Explorer versions 6.0, 7.0, and 8.0
- Apple® Safari version 5.0.x

## The Installation and Customization Steps in this document include:

**Basic**

- Access the App on the Salesforce's AppExchange 2.
- Installing MyFax for AppExchange 2
- Accessing the MyFax App View
- Activating MyFax for AppExchange 2
- Customization of Page Layouts for MyFax
- Configuring MyFax Received Faxes

**Enhanced**

- Enabling Merge Fields, App Settings and Dynamic Billing Codes
- Enhanced User Experience
- Confirming/Configuring Access to MyFax

## Where to find MyFax for AppExchange 2

MyFax for AppExchange 2 can be installed from **http://sites.force.com/appexchange/home**, just search under "Apps" for "MyFax". Click on the "Get it Now" link the start the installation process. Here you'll also find admin guides, user videos, screen shots and much more. Also visit **http://www.myfax.com/lp/salesforce** for more information.

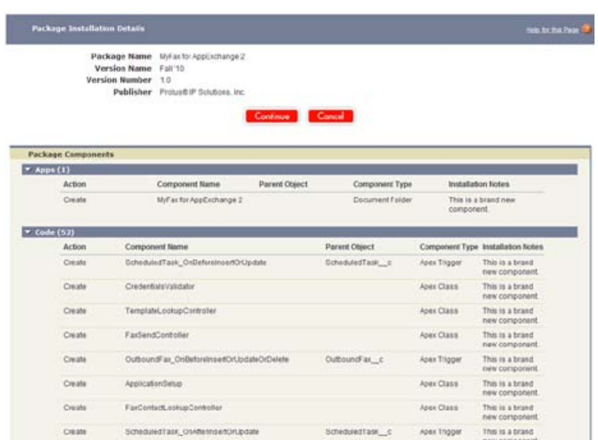
## 1. Accessing the App

In order to install MyFax for AppExchange 2, administrative privileges are required on your Salesforce CRM account. This is to ensure those without appropriate privileges are unable to make changes to your system. Installation is typically done by System Administrators who have access to "Download AppExchange Packages".

## 2. Installing MyFax for AppExchange 2

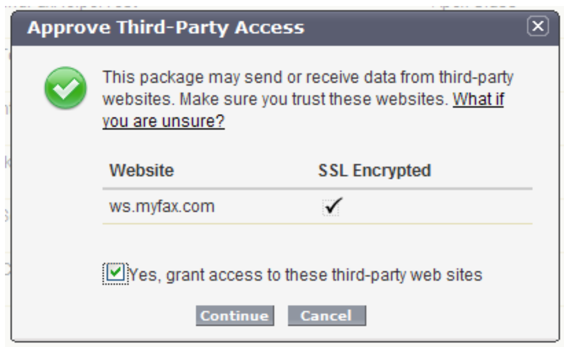
### Review Package Components

Before you begin the installation, you have the option to review all the components of MyFax for AppExchange 2. Salesforce CRM provides details on the package being installed, such as name, version information, and publisher. The packaged components table provides details on each component which is installed, or changed by the MyFax for AppExchange 2 package. To proceed with the installation, click "Continue".



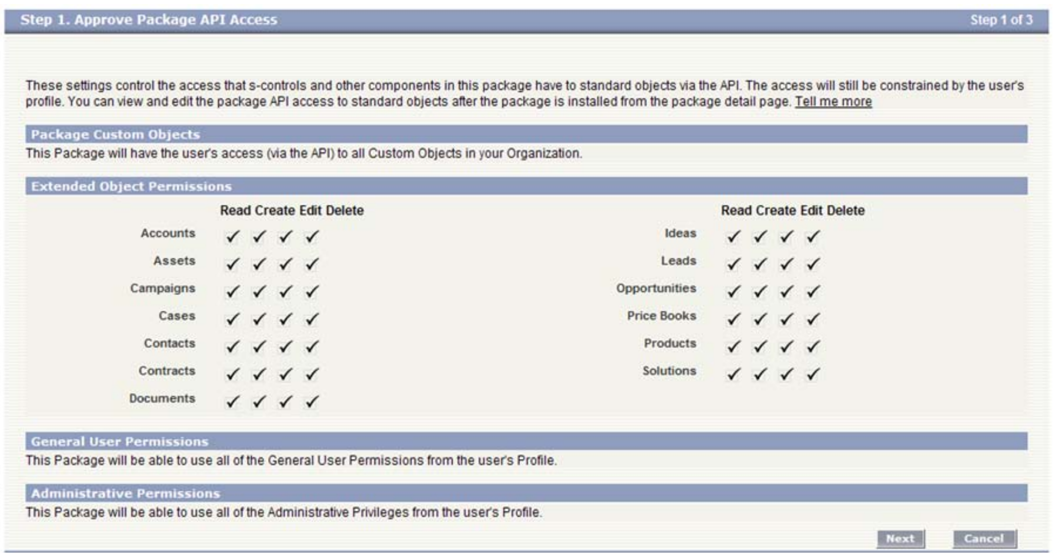
## Approve Third-Party Access

The first step of the installation is to approve access of the MyFax Web Services from your Salesforce instance.  This web service is used by MyFax to deliver faxes securely between the Salesforce CRM and MyFax environments and validate your MyFax user credentials.  None of your Salesforce information is passed to the MyFax service, this connection provides access to the secure transport mechanism for fax images.



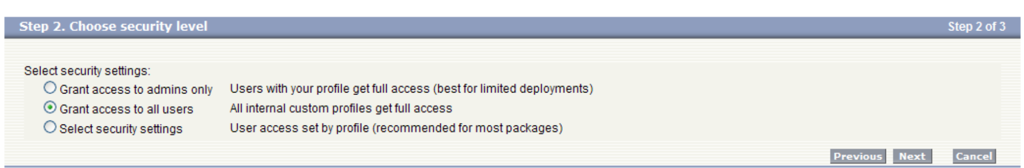

## Approve API Access to the Salesforce Instance

MyFax for AppExchange 2 requires access to your Salesforce CRM objects through the API in order to integrate with your instance.  Please review the extended object permissions required by MyFax and approve the required level of access by clicking "Next".



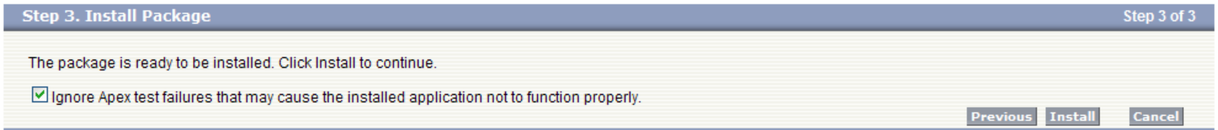

## Choose Security Levels and User Restrictions

When installing MyFax for AppExchange 2 you have the ability to control who has access to the App.  This allows complete control of functionality presented to various users within your organization.  Choose from the security levels the one that best meets your needs for MyFax and click "Next" to continue.



## Start Installation

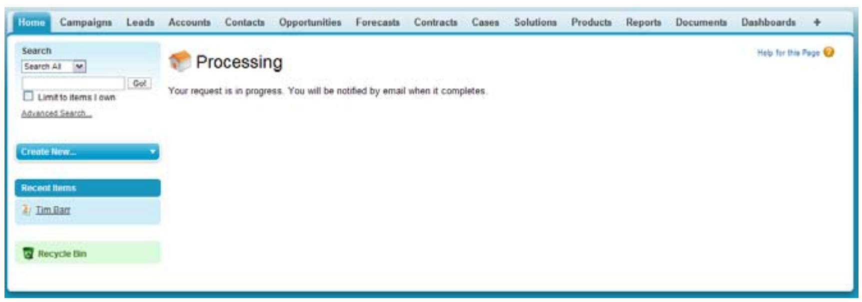
At this point you are ready to install the App. If you feel you need to make adjustments before initiating the install, click "Previous" to return to any of the preliminary configuration pages. If you are happy with your settings, and ready to start using MyFax for AppExchange 2, click the "Install" button and MyFax will be added to your Salesforce CRM Org.



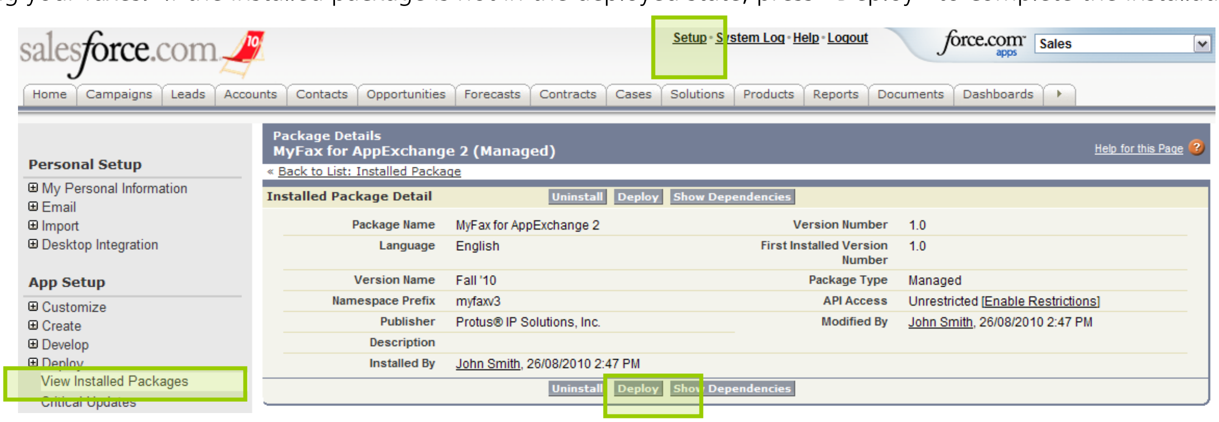

## Deploying the App

Once the App has been installed the next steps are to deploy the App so users have access to the objects used by MyFax for AppExchange 2. This is accomplished by completing the following steps which are accessible immediately after the installation is complete.

MyFax for AppExchange 2 installation process takes less than a minute. A processing installation screen will be presented by Salesforce CRM and a notification will be delivered to the administrator via email once the install has successfully completed.




Once installation is complete the App must be deployed in order to be accessed by users. To deploy the App, you must access to the Salesforce CRM "Setup" menu and confirm the deployment status of MyFax for AppExchange 2 to begin delivering your faxes. If the installed package is not in the deployed state, press "Deploy" to complete the installation.




## Installation Complete

The installation of MyFax for AppExchange 2 is now complete, next we show the "MyFax App View" which can be used as your primary interface for everything fax related.

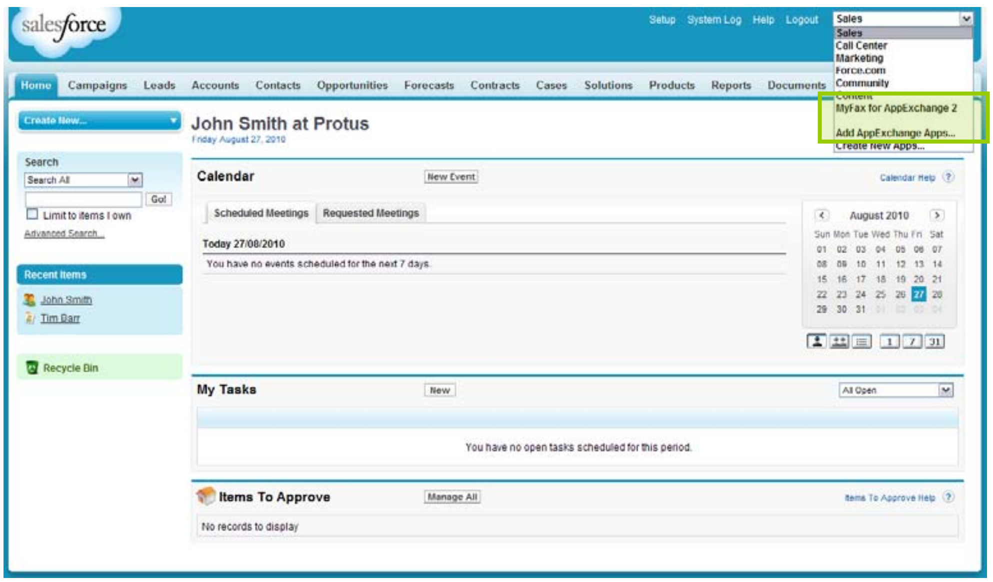
## 3. MyFax App View

MyFax for AppExchange 2 provides an App view completely its own, in addition to be able to integrate into your existing Apps. This view can be used to unite all the fax functionality into a single view for users and/or administrators to get familiar with the functionality provided before distributing it throughout your other Apps.

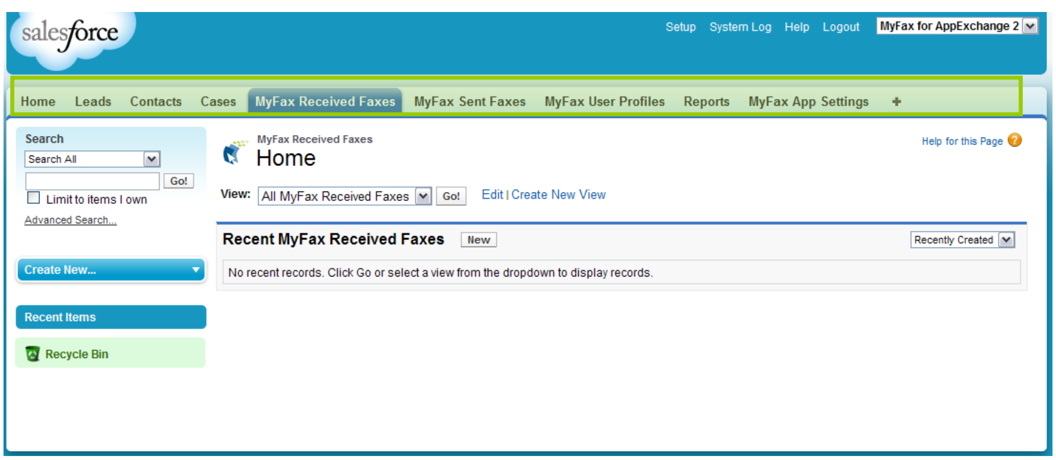
Later in this document we will explain how to easily integrate MyFax into your existing Sales, Call Center or Marketing Apps, to provide a level of customization which best meets your needs.

To access the MyFax App view:

- Select "MyFax for AppExchange 2" from the App view drop down menu.



The most commonly used MyFax tabs are conveniently displayed and accessible from this view and can be updated to best meet your own unique requirements. Tabs can be added or removed at any time, as can be done with any Salesforce CRM App. From the MyFax App you can drive all your fax sending and receiving activities from one easy to use interface.



We will now review the customization of layouts in order to access the ability to send, receive and manage faxes directly from Salesforce CRM.

# 4. Customization of Page Layouts for MyFax

As with other native or AppExchange Apps available on Salesforce CRM, the administrator has the ability to change the look and feel of the interface. MyFax for AppExchange 2 follows these same methods for the presentation of the "Send a Fax", "Send Mass Fax & Email" and "Update Fax Status" buttons which are presented for the faxing process. Besides the backend custom MyFax objects and reports, these buttons are the only additional components the end user will see in Salesforce CRM. MyFax for AppExchange 2 is designed to seamlessly fit with the existing Salesforce user processes and Apps. In this section we will demonstrate the recommended location to place these buttons, in order to provide the best integration of the MyFax App.

**Note:** Ensure that you have administrative rights on your account, as this is required to make these adjustments to Salesforce CRM.

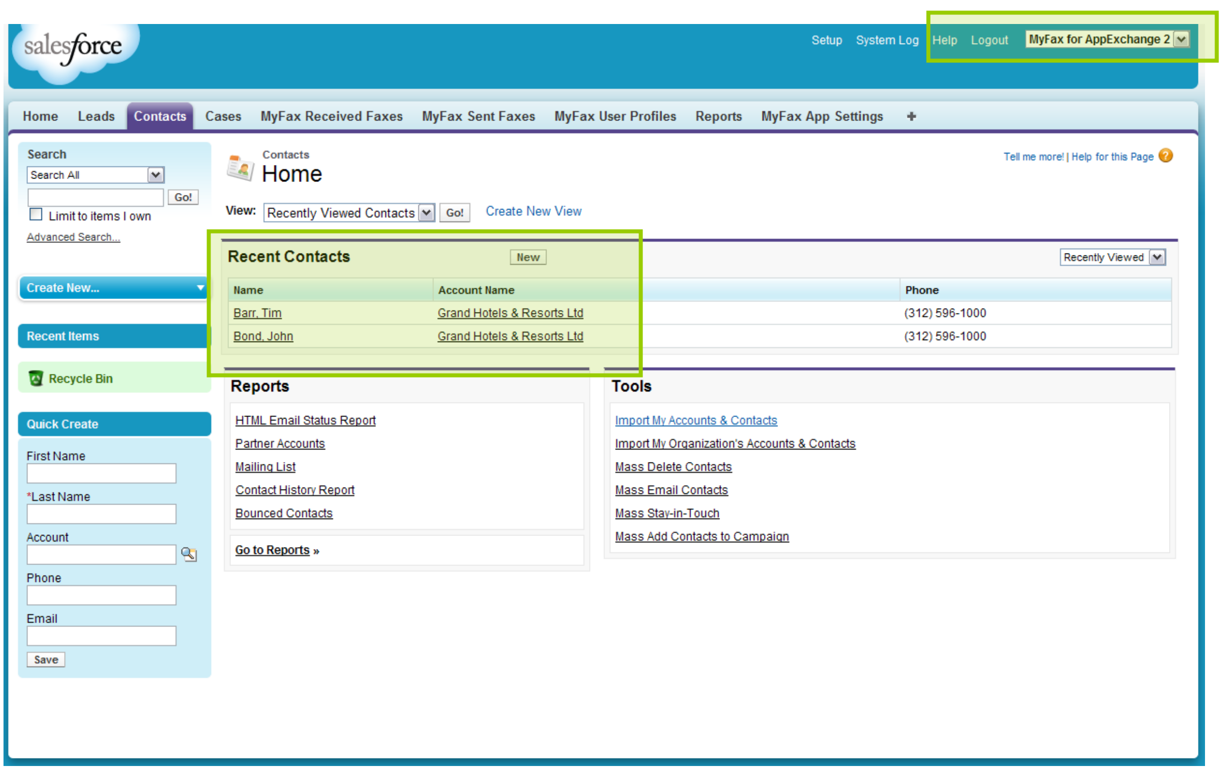
## Select the Tab to Present MyFax

Installation of MyFax for AppExchange 2 is recommended on one or all of the following Page Layouts:

- Leads
- Contacts
- Cases

This provides access to the most common places where users may wish to send a fax to a customer or potential customer, just like they would choose to send an email. For those who have not performed this task in Salesforce CRM, we will now demonstrate how to access a "Contact" and adjust the layout provided for all contacts in the organization.

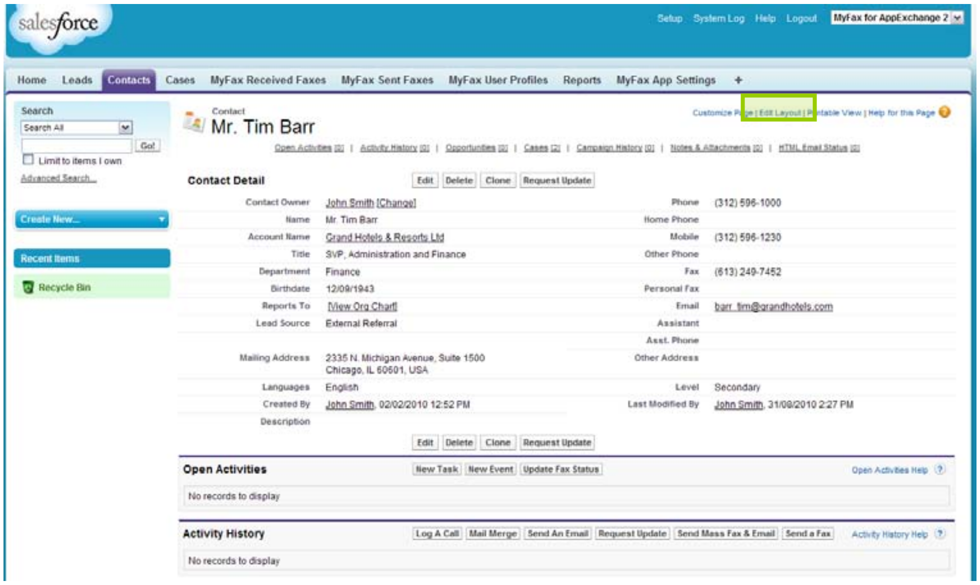
- Access "MyFax for AppExchange 2" view in the upper right.
- Select the "Contacts" tab.
- Choose a recent contact from the list or "Go" to a list view of contacts.



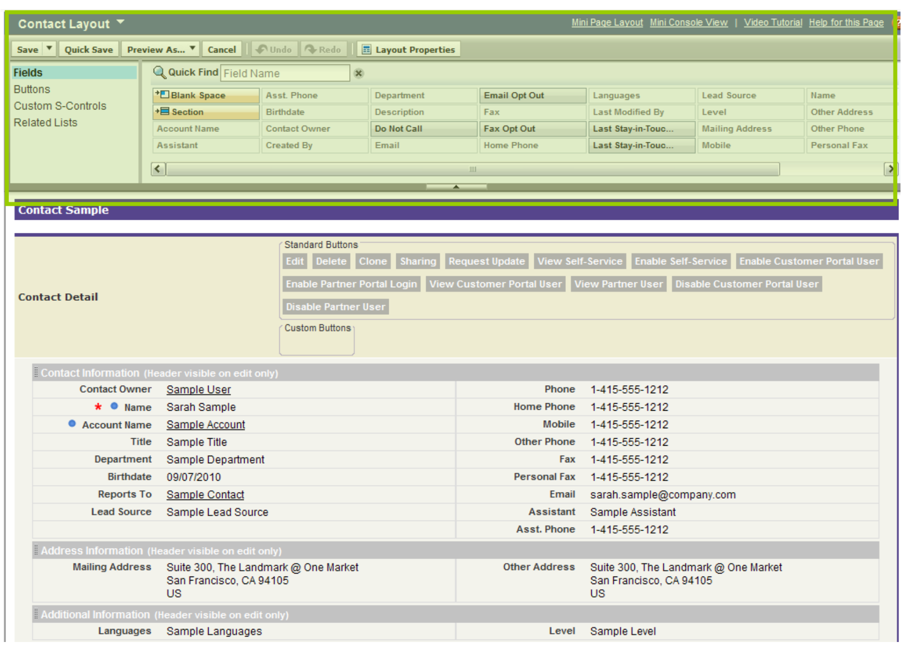
## Edit Page Layouts to Include MyFax for AppExchange 2 Buttons

If you have administrative rights, the layout of the page can be edited to best serve your interface requirements from a "Contact", "Lead" or "Case". Choose any Contact to begin, changes will be applied to the layout of all Contacts. If you have multiple Contact Layouts, ensure you are making changes to the layouts used by the appropriate "User Profiles". To edit the layout, perform the following:

- In the upper right, choose "Edit Layout".

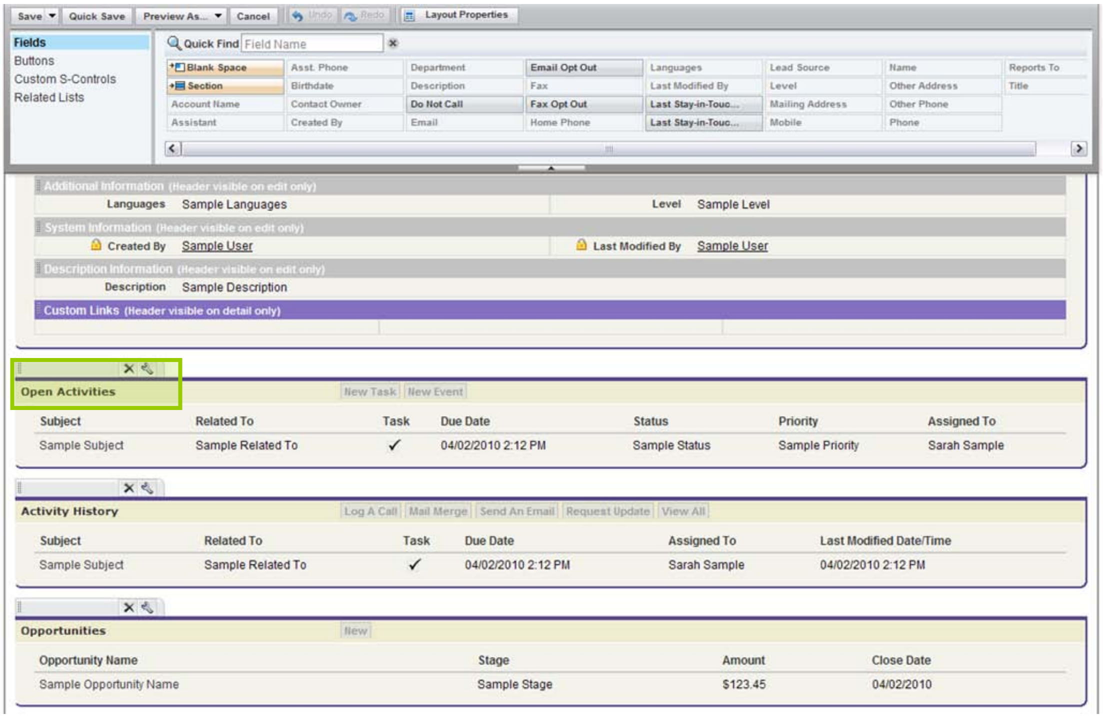



- The "Layout Editor" is presented.

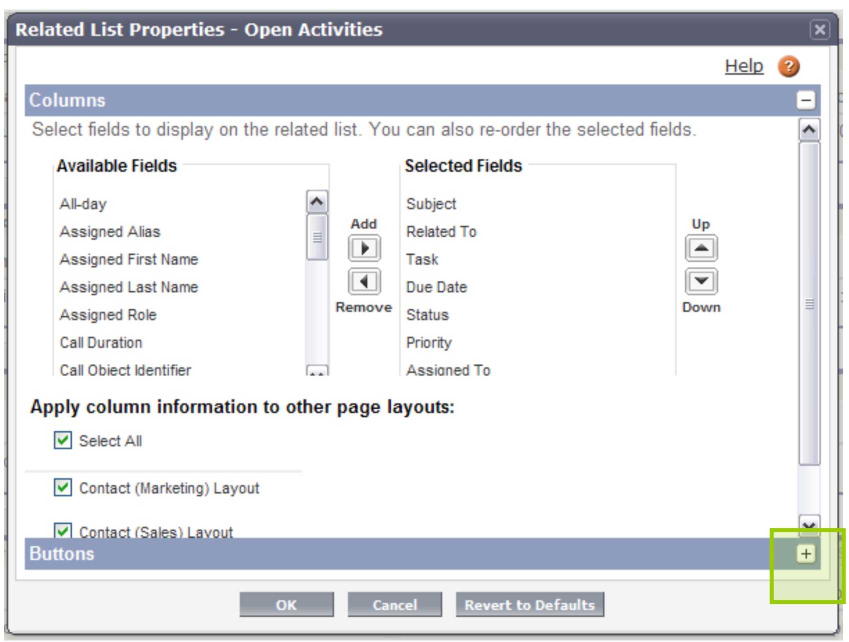



**Note:** If multiple Contact Layouts exist, buttons must be added to each layout through the "Customize" options, found under the "App Setup" in the "Setup" menu. For the desired App (in this case Contacts), choose "Page Layouts" and select "Edit".

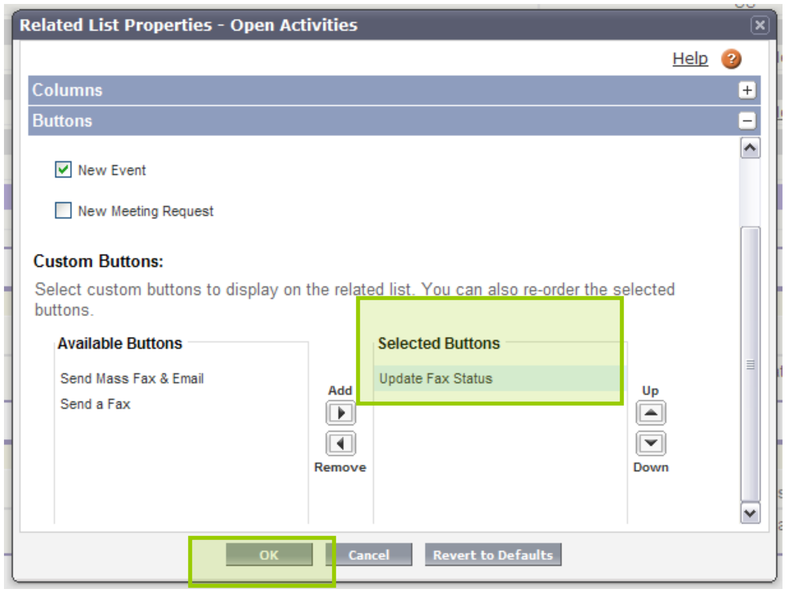
- Scroll Down to "Open Activities" and edit with the "wrench" icon.



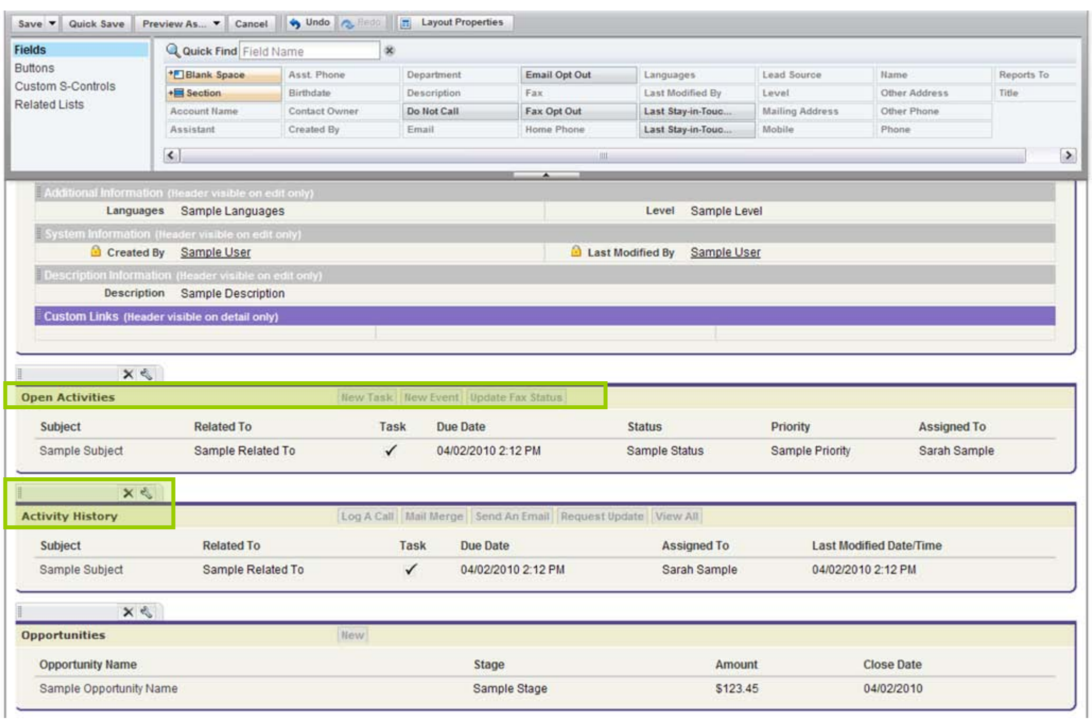

- Select Buttons "+" to view the button options at the bottom of the interface.



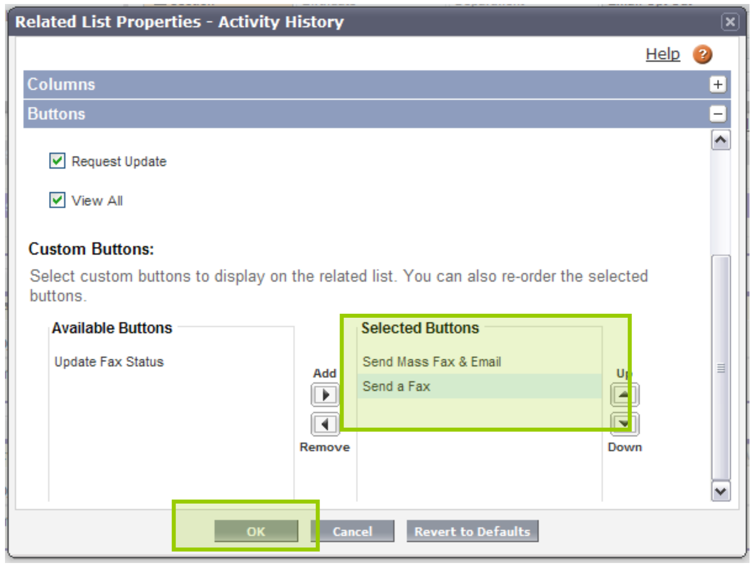
- Choose to Add "Update Fax Status" button.
- Select "OK" to commit the changes.




- The "Open Activities" list for contacts has now been updated.
- The "Update Fax Status" button is now present.
- Next, scroll down to "Activity History" and edit with the "wrench".

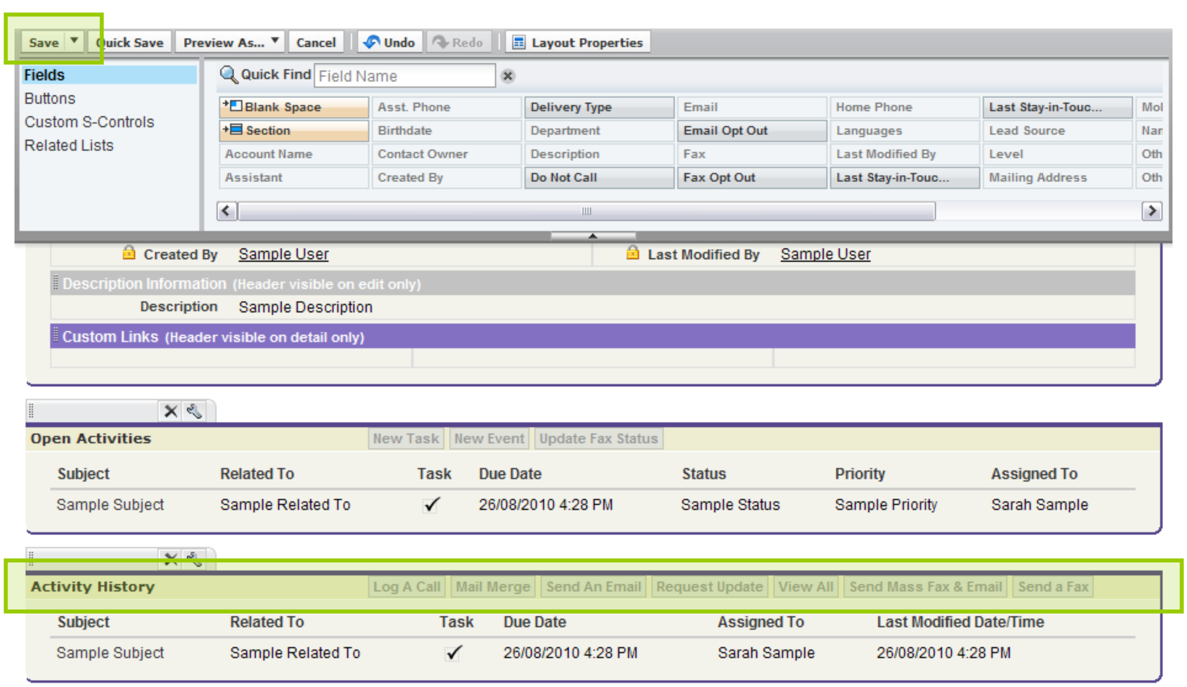


- As before, select the Buttons "+" to view the button options.
- Add "Send Mass Fax & Email" and "Send a Fax".
- Then select "OK" to commit the changes.




**Note:** You only need to add the "Send Mass Fax & Email" button if you require the ability to send mass faxes to your contacts or customers.

- The "Activity History" list for contacts has now been updated.
- The "Send a Fax" and "Send Mass Fax & Email" button have been added.
- Select "Save" to commit layout changes which have been applied.

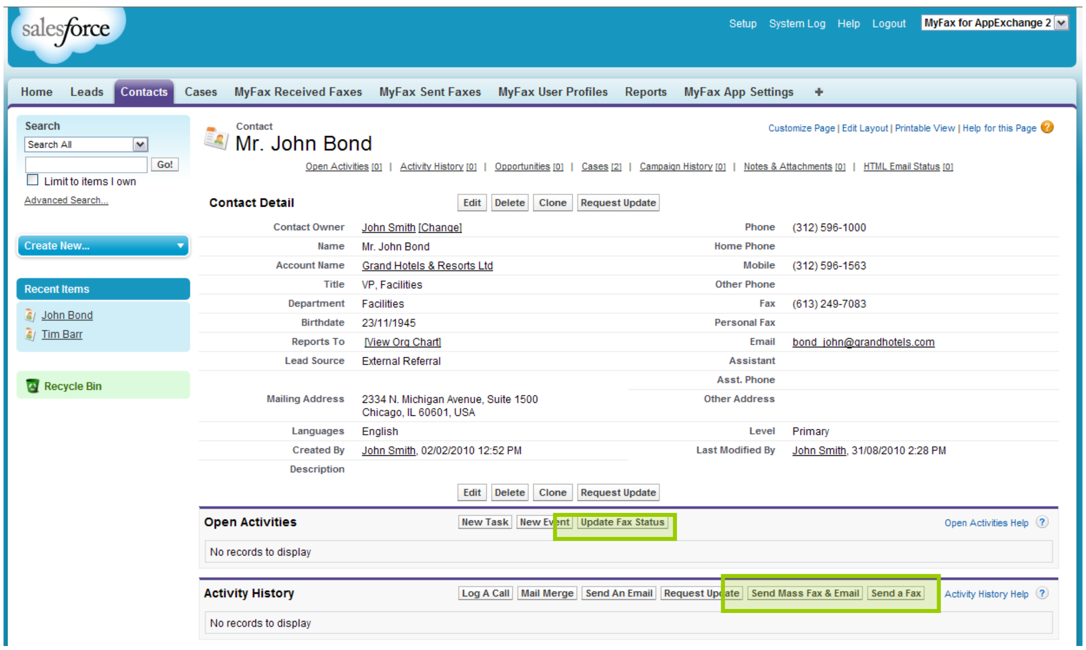



The steps in this section can also be applied to update the layouts for Leads or Cases, should you wish to access the MyFax services from these App tabs.

# 5. Activating MyFax for AppExchange 2

Once the previous steps have been completed, users with appropriate privileges now have the option to send a fax from Contacts, Leads or Cases. If you would like "MyFax" buttons in the Leads and Cases tabs, the steps followed in Section 4, can be applied. The following shows the interface the user will see, the first time they attempt to send a fax using MyFax for AppExchange 2.

## "MyFax" Buttons are Provided for All Contacts




## Login to MyFax

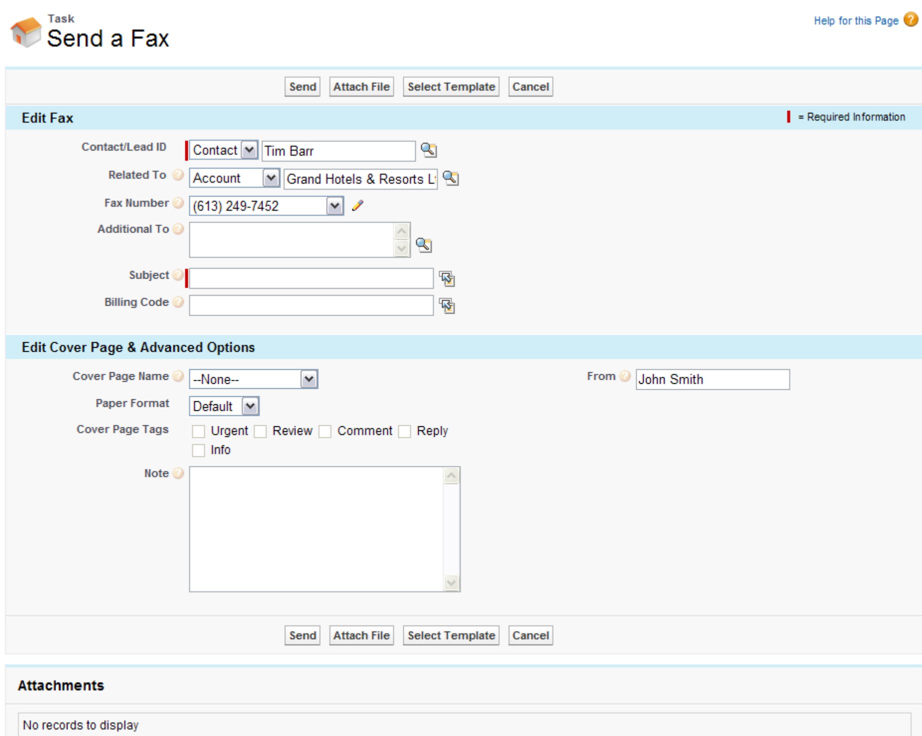
When clicking the "Send a Fax" or "Send Mass Fax & Email" button for the first time, the user is presented with the following interface that includes the option to login to MyFax (if the user has an existing account) or sign-up for a new account (if this is the first time you have used MyFax services). You can login using any of the following 3 credentials; your MyFax UserID, the email address associated with your MyFax account, or your MyFax fax number, for example: 8665551234. By default the email address associated with your Salesforce CRM account is auto populated, if you use a different email address for you MyFax account, be sure to update this field to use the appropriate address.

If the login is successful, the user will see the following:


If any errors occur the user will see an error message with support information (invalid login ID, incorrect password, account locked, etc.). For more information on user errors, please contact MyFax support, **http://www.myfax.com/support/** or send an email to **myfaxforappexchange@myfax.com.**

## Sending a Fax

Users are now able to send faxes from Salesforce CRM using the following interface.




For detailed instructions on using all MyFax for AppExchange 2 features please see the "MyFax for AppExchange 2 User Guide" available on the AppExchange. This document provides a step by step guide to using the features which have been configured by the Salesforce CRM Administrator.

## 6. Configuring MyFax Received Faxes

MyFax for AppExchange 2 provides the ability for you to pull incoming faxes directly into your Salesforce CRM Org. This allows easy insertion of all fax related information to Salesforce CRM automatically using MyFax. Faxes can be received via an Inbound email handler, using the native email integration functionality provided by Salesforce CRM, or securely via MyFax Web Services. In the next section we will outline how to configure the MyFax Web Services for fax reception directly to Salesforce CRM.

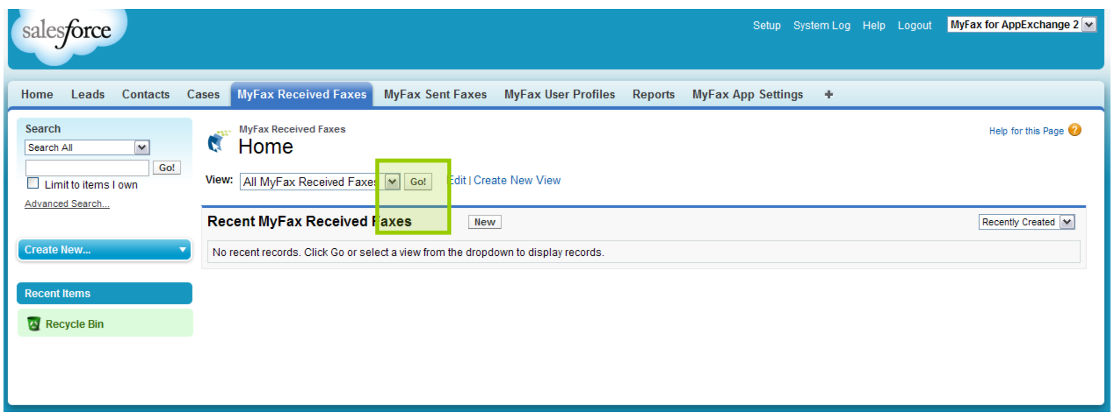
### MyFax Web Services "Check for New Faxes"

Once you have activated your account and sent a fax, you can check your received faxes (on your MyFax number associated to your account) simply by accessing the "Check New for Faxes". Very little configuration is required to receive faxes via the web services.

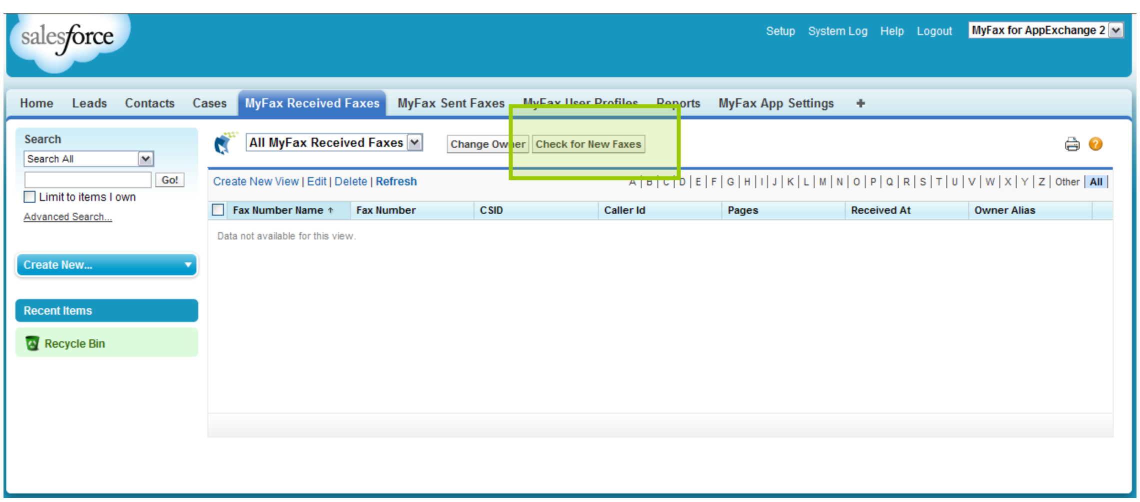
**Note:** To check received faxes via web services it is recommended to first send a fax from Salesforce CRM in order to establish the relationship between your Salesforce CRM and MyFax account.

To view received faxes via web services, perform the following:

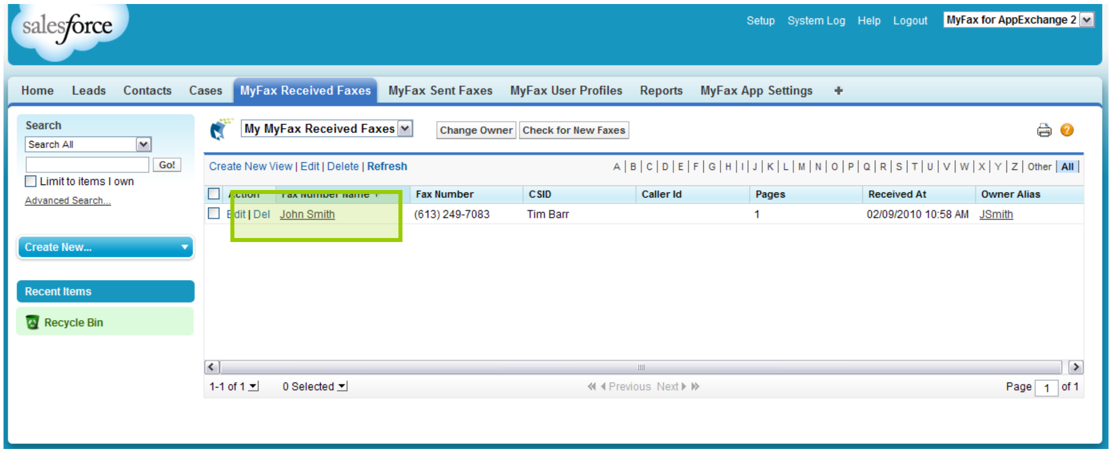
- Select "MyFax Received Faxes".
- Choose "Go" from the MyFax Received Faxes home screen to view all incoming faxes.



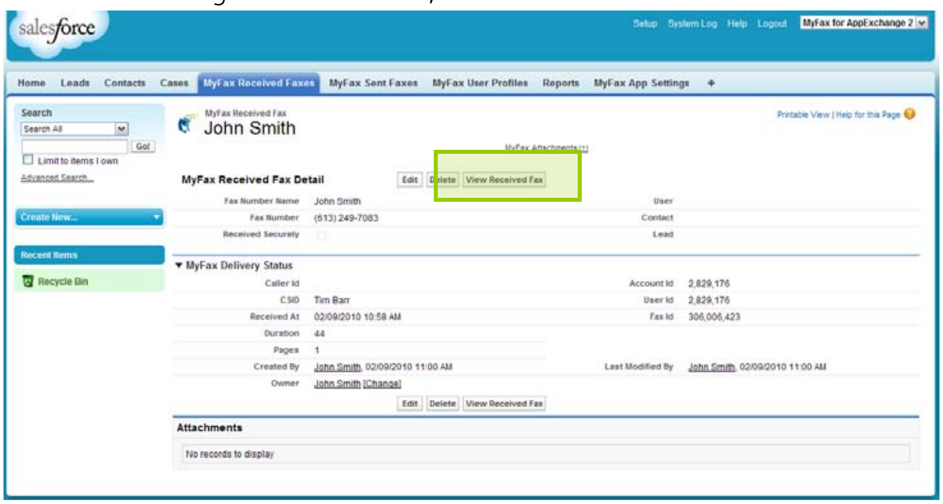

- Use "Check for New Faxes" to download any new faxes available on your MyFax account.



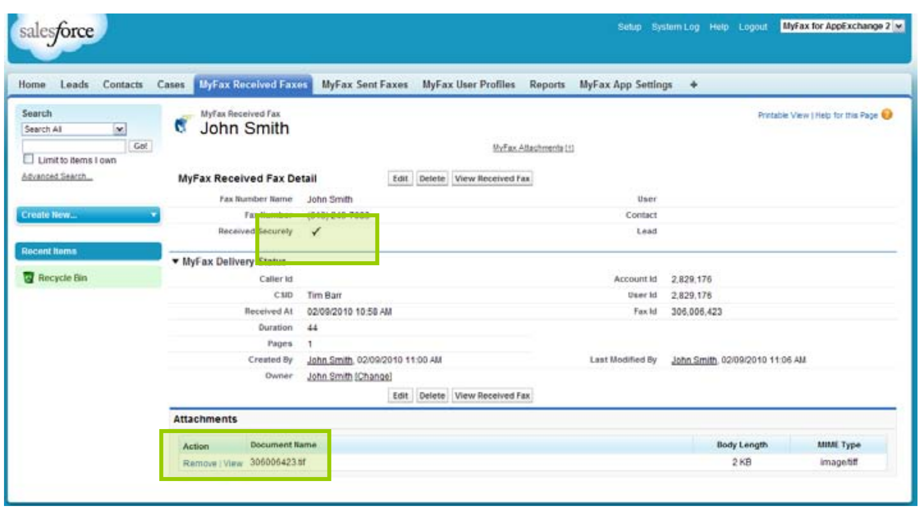
- Select the “Fax Number Name” of the desired fax to view further details.




- Information regarding the fax transaction is provided in this received fax detail page.
- To download and view the image via web services, select “View Received Fax”.




- The fax image has now been downloaded, added to the record and stored in Salesforce CRM.
- Also note, when a fax image is downloaded via web services, it is always downloaded securely.



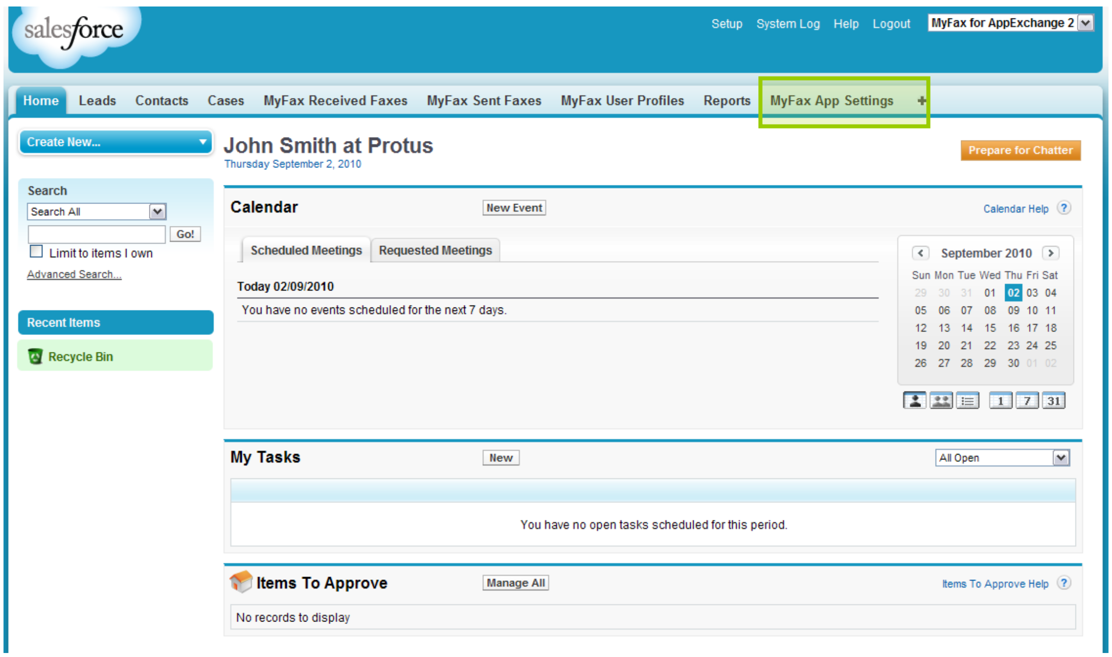
# 7. Enabling Merge Fields and App Settings

In order for the App to be fully integrated and useable within Salesforce CRM, the "MyFax App Settings" and "MyFax Merge Rules" must be activated. Each of these is activated by completing the following steps as outlined below.

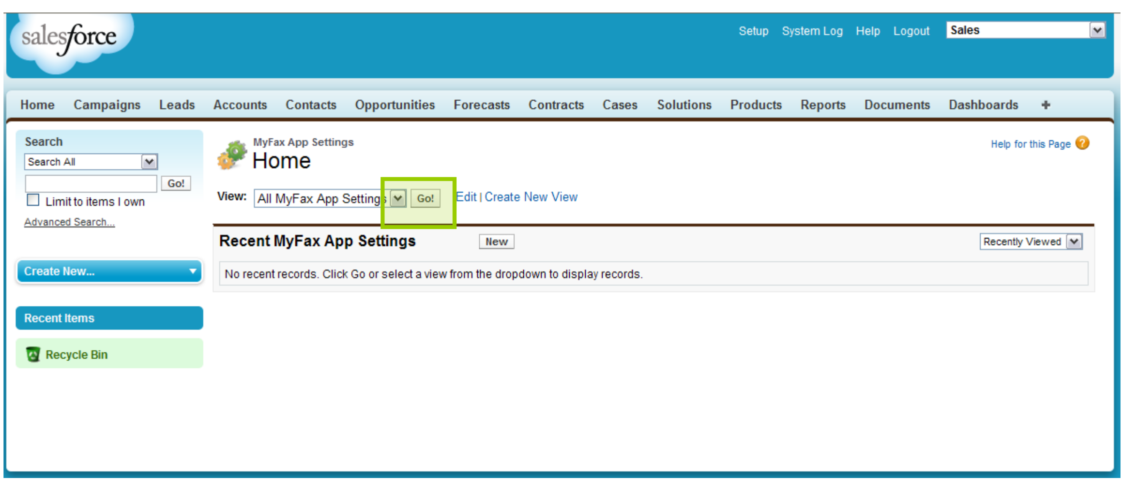
## App Setting Fields

To active the MyFax App settings perform the following:

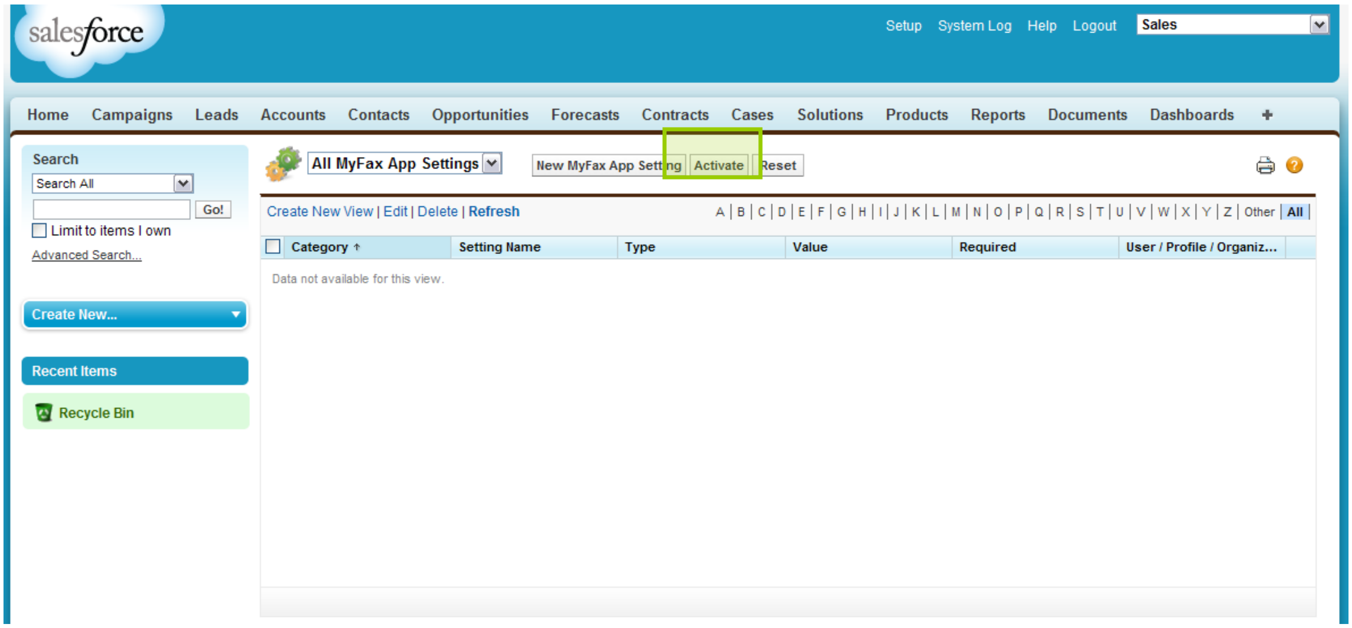
- Choose "MyFax App Settings".



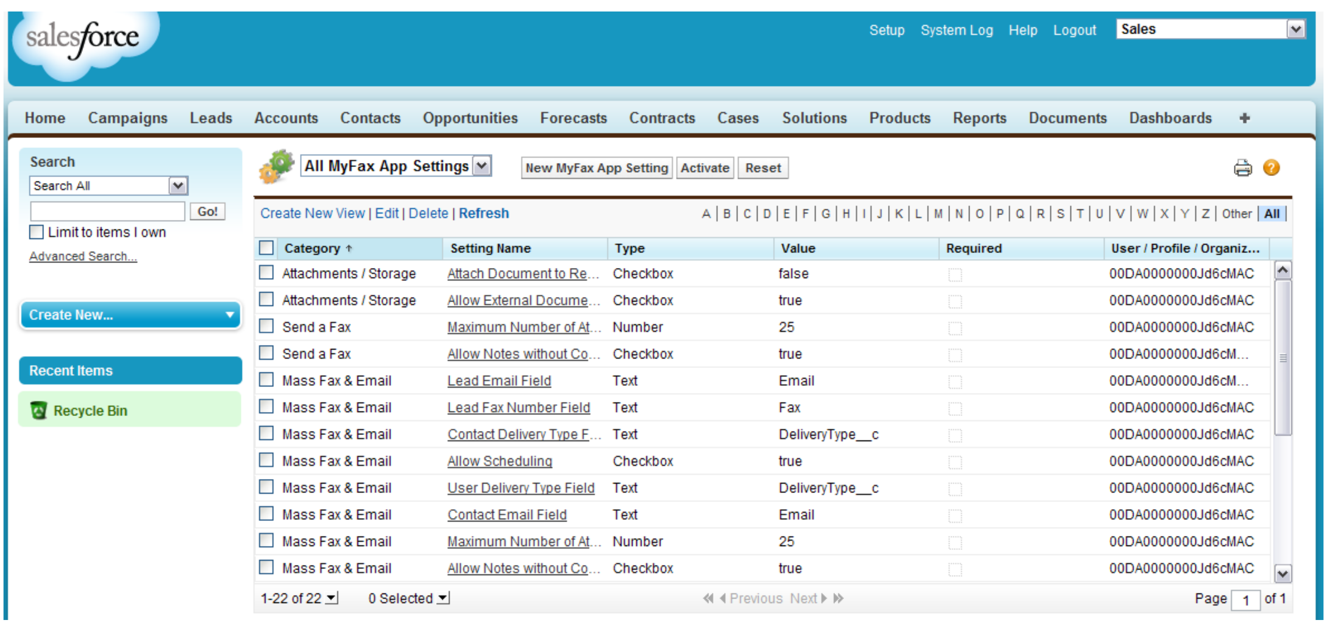

- Select "Go" to view all the App settings.



- When the page has loaded, select "Activate" to enable the App settings required by MyFax.



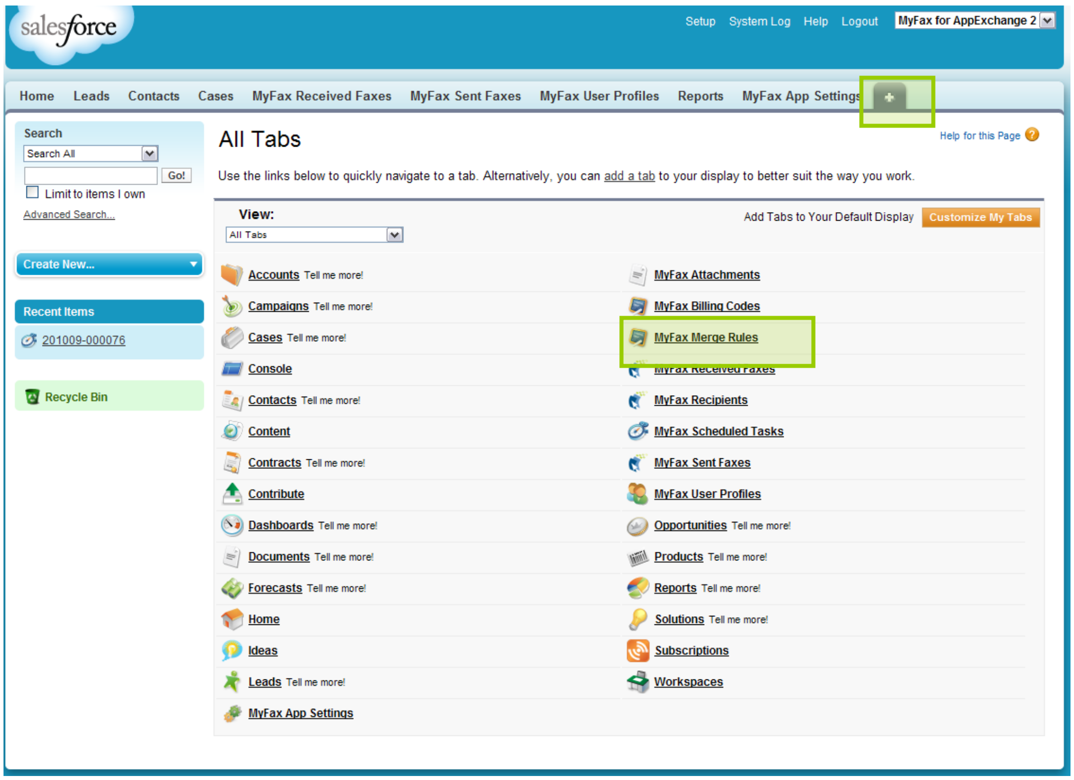

Once activated, the available settings are listed and can be edited or updated by the administrator. Before adjusting these settings, consult with Sales Engineering at **myfaxforappexchange@myfax.com** to discuss the configuration options available to best meet your needs.



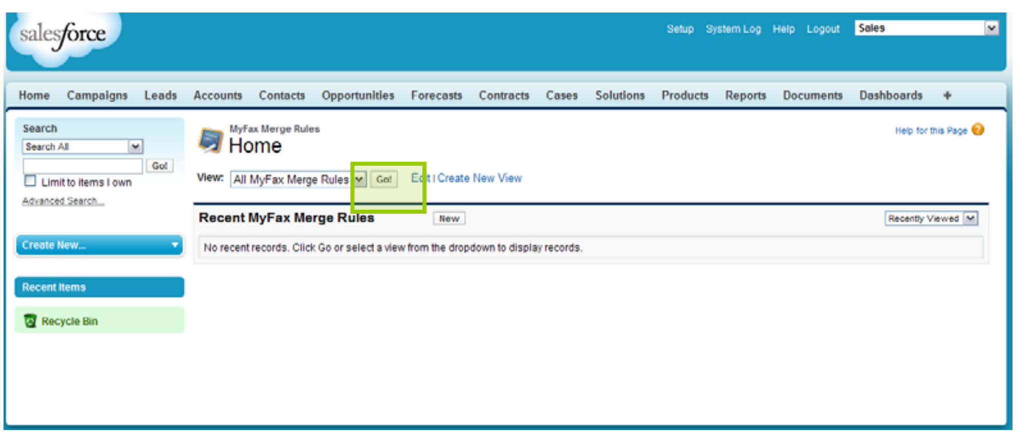
## Merge Fields

To active the MyFax Merge Rule settings perform the following:

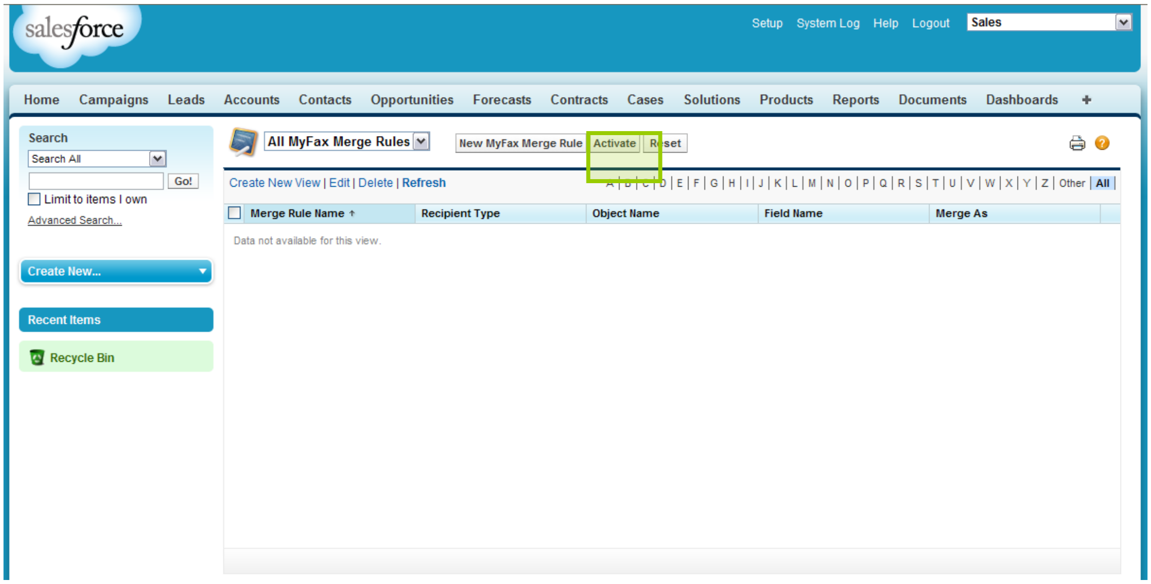
- Select the "+" to view all the available tabs within your Salesforce CRM Org.
- Choose "MyFax Merge Rules".



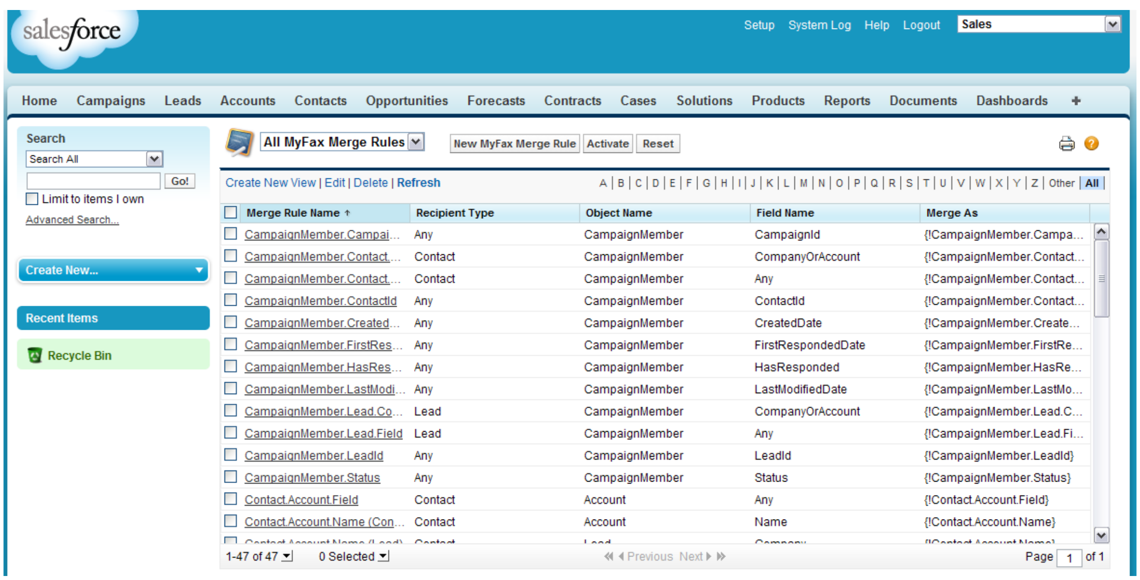

- Select "Go" to view all the merge settings.



- When the page has loaded, select "Activate" to enable the merge rules required by MyFax.




Once activated, the available settings are listed and can be edited or updated by the administrator. Before adjusting these settings, consult with Sales Engineering at **myfaxforappexchange@myfax.com** to discuss the configuration options available to best meet your needs.




**You have now successfully installed MyFax for AppExchange 2. Additional users can be added as needed to support your business process integrated faxing needs.**

For additional help with configuring MyFax for AppExchange 2 in your organization, please contact us at **myfaxforappexchange@myfax.com**. Additional information regarding more detailed and integrated configuration of MyFax for AppExchange 2 is provided in the following appendix sections of this document.

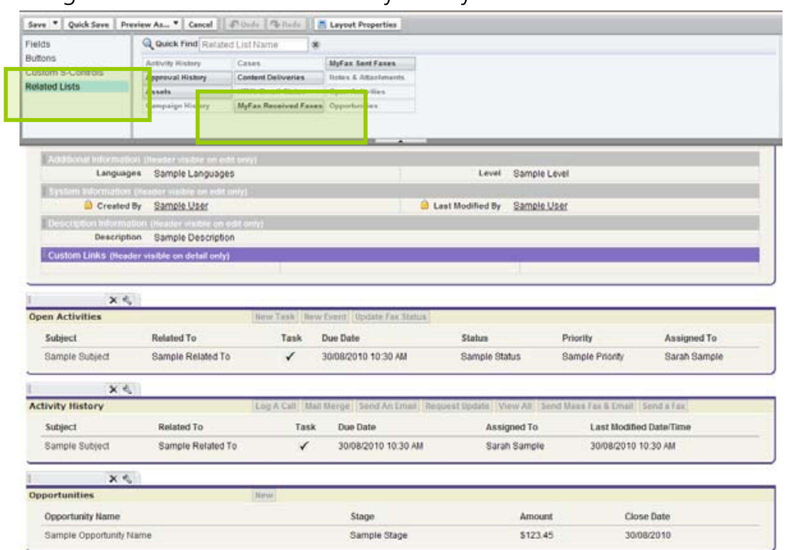
## Appendix A: Enhanced User Experience

The following section outlines additional changes which can be made to Salesforce CRM to integrate MyFax services more directly into existing Salesforce CRM Apps and to manage and control the permission levels of MyFax Custom Objects within Salesforce CRM.

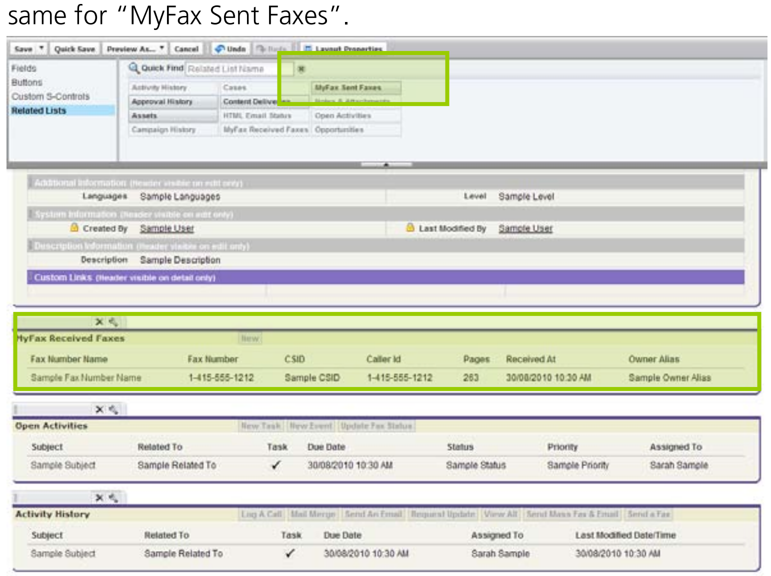
### Add MyFax Related Lists for Viewing Faxes Related to Contacts

In your layout you have the option to add "Related Lists" which can be added to your Contacts in order to show "MyFax Received Faxes" and "MyFax Sent Faxes" directly within the contact listing. To perform this:

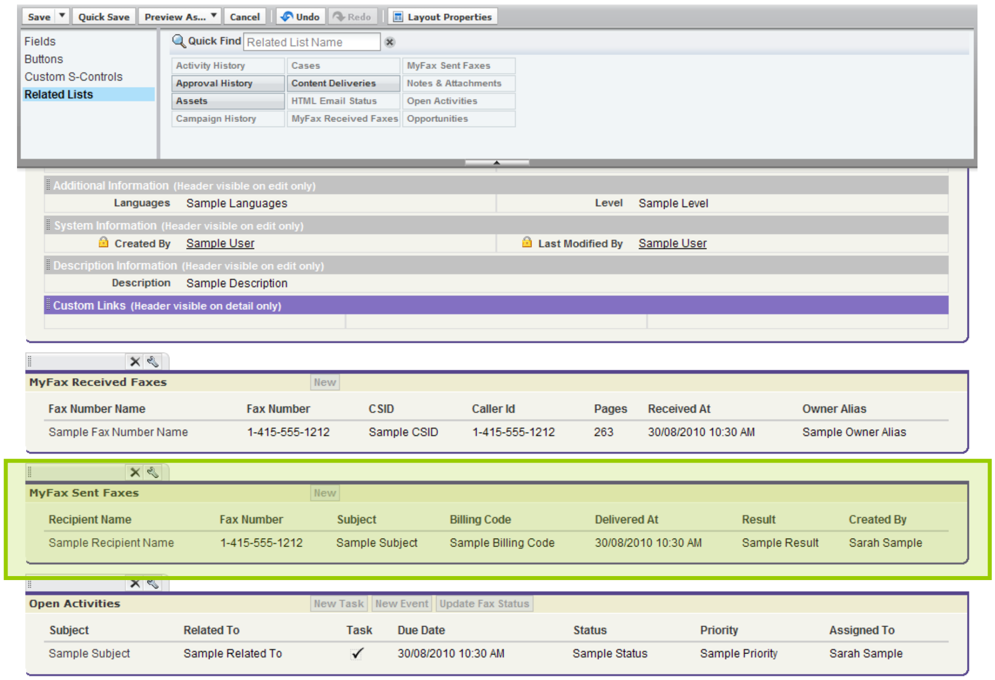
- Select "Related Lists".
- Choose the desired related list, in this case "MyFax Received Faxes".
- Drag and drop this listing to the desired location on your layout.



- "MyFax Received Faxes" has now been added and received fax items related to a contact can now be viewed directly on the Contact.
- We can now do the same for "MyFax Sent Faxes".

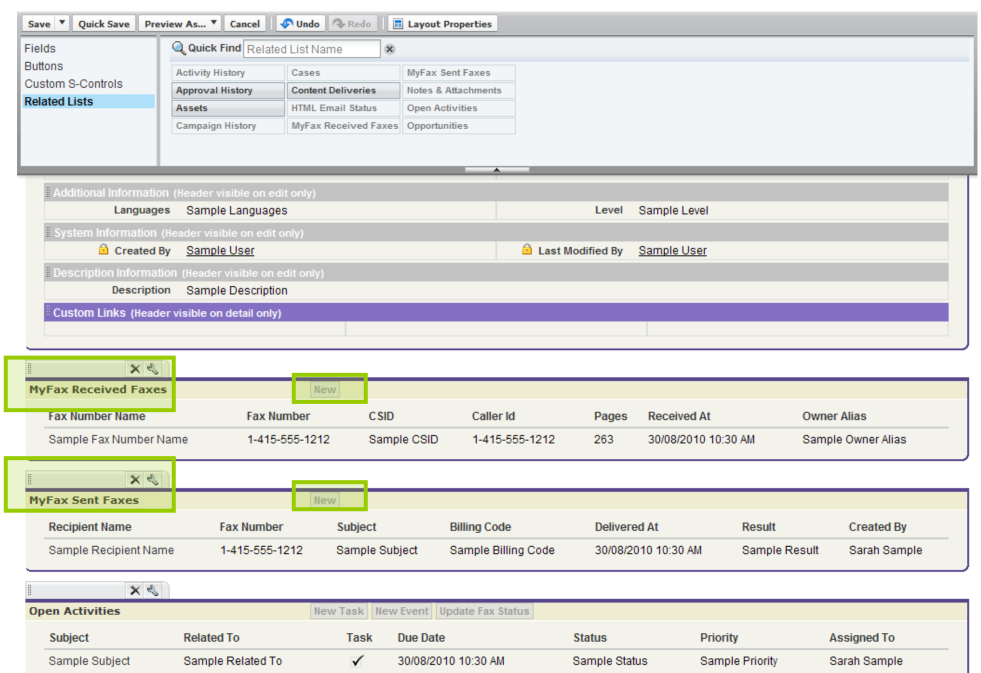


- Drag and drop this listing to the desired location on your layout.
- "MyFax Sent Faxes" has now been added and sent fax items related to a contact can now be viewed directly on the Contact itself.

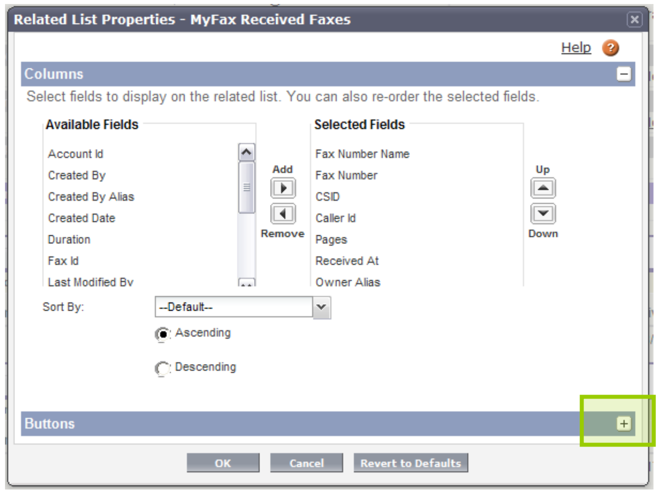


Remove the "New" item option for these two new lists, as they will be automatically filled by the MyFax App, and should not be generated manually by users. First let us perform this for "MyFax Received Faxes", to do this:

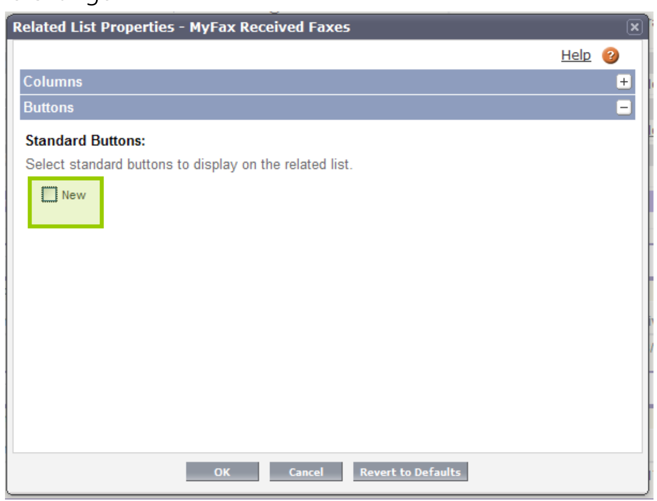
- Select the "wrench" beside the desired related list.



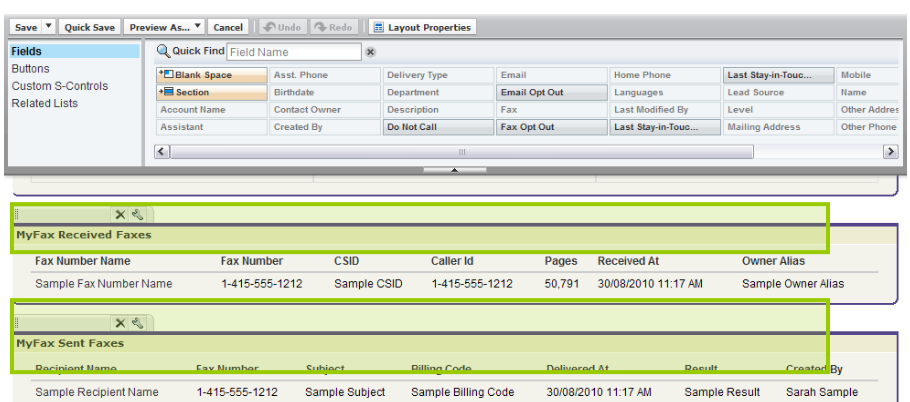
- Select the “+” sign to view the buttons associated with the list.




- Remove the “New” button by unselecting the check box.
- Select “Ok” to commit the change



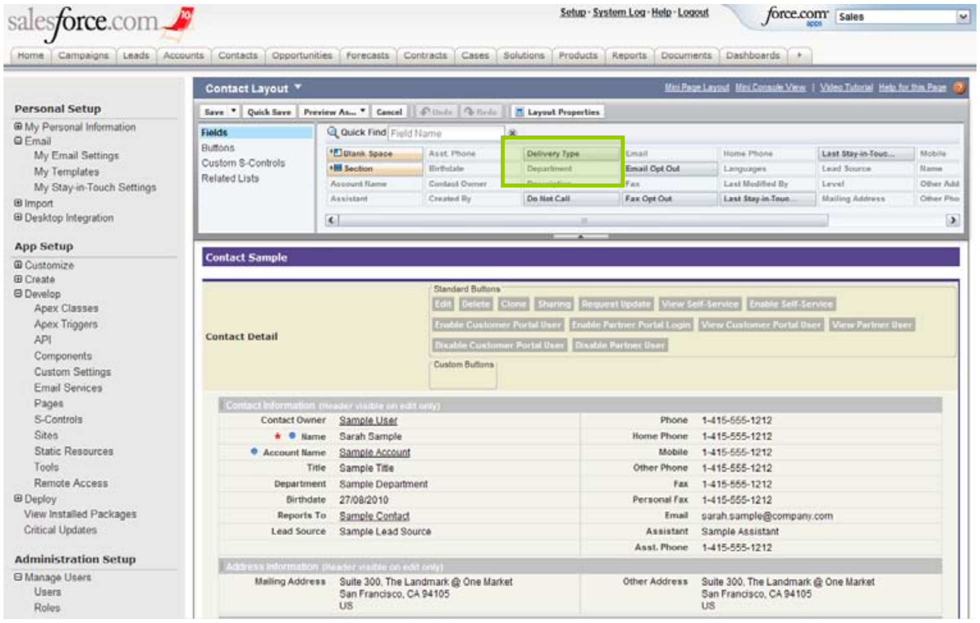

Repeat the above steps for “MyFax Sent Faxes” as it also does not require the ability for users to manually create new entries. Both of the new related lists should no longer have the “New” option presented.



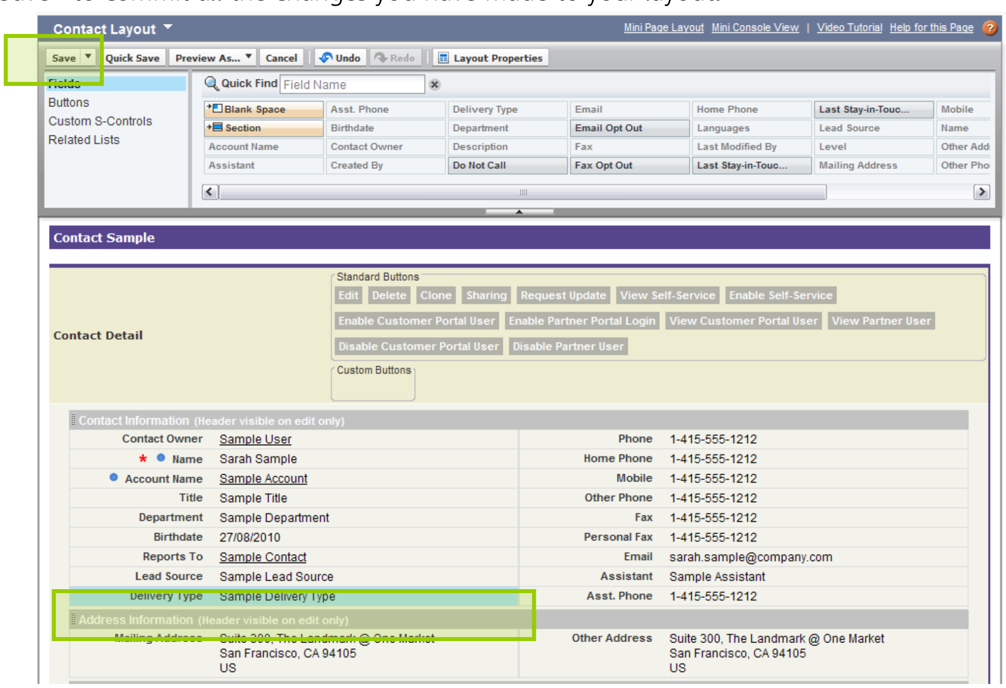
## Add Delivery Type Field for Mass Fax & Email

In order to deliver Mass Fax & Emails to Contacts you must add the “Delivery Type” field to your contact. This delivery type is used to determine how mass communications can be delivered to the Contact either; “Fax”, “Email” or “Fax & Email” are selection options.

- Select “Delivery Type”.




- Drag and Drop the “Delivery Type” field to the desired location in your layout.
- Select “Save” to commit all the changes you have made to your layout.

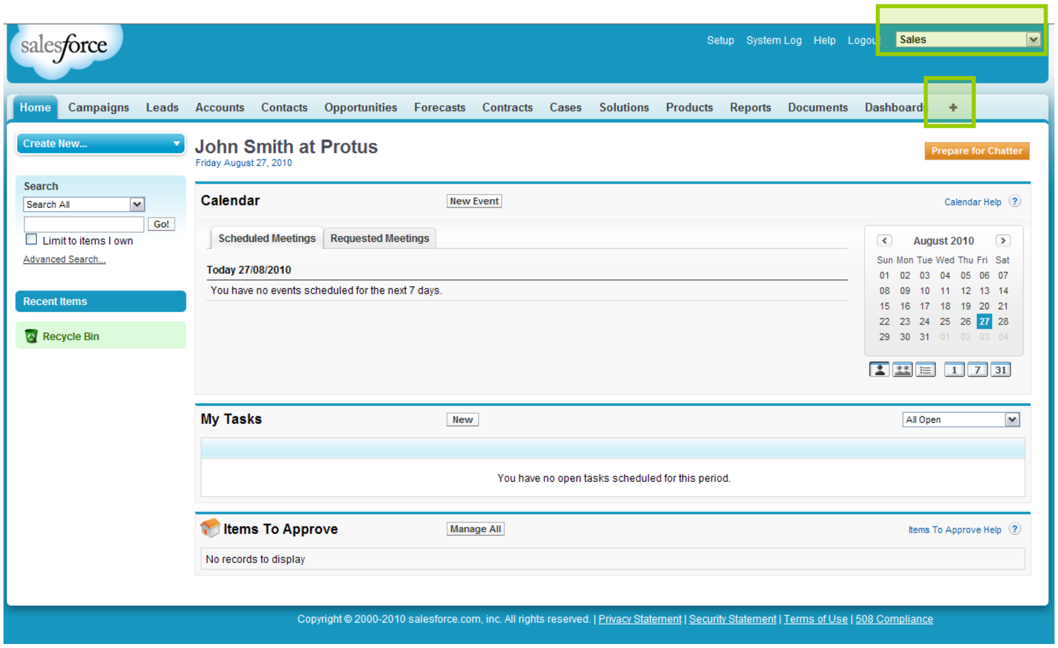



The steps in this section can also be applied to update the layouts for Leads or Cases should you wish to tightly integrate fax services into these Apps.

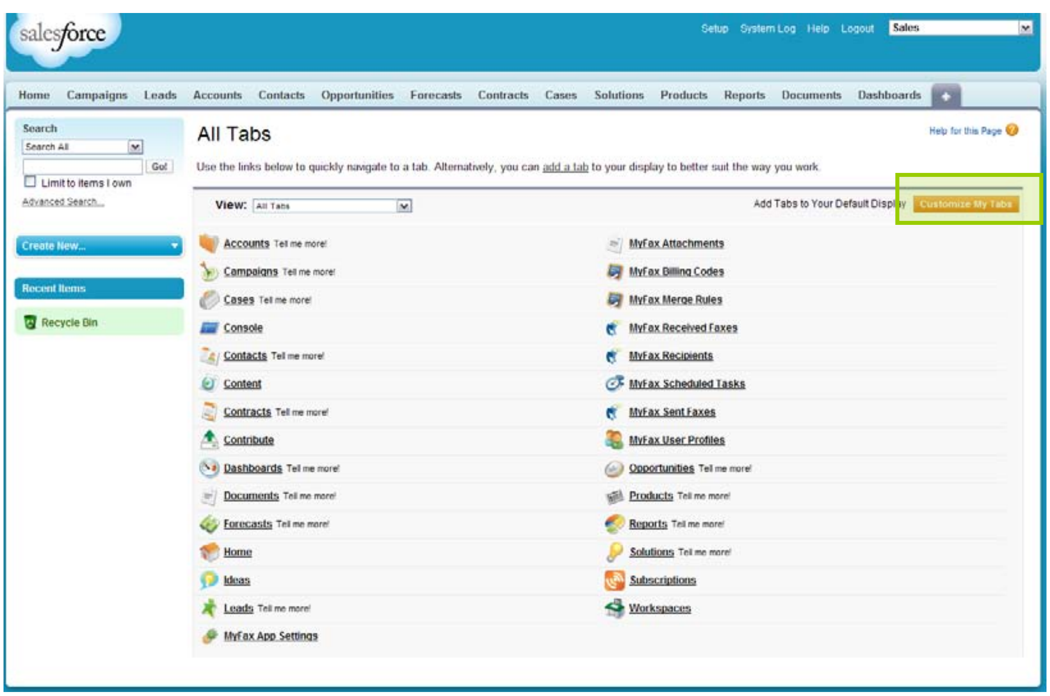
## Showing the MyFax Received Faxes Tab

In order to see your incoming or outgoing faxes, you may choose to add the "MyFax Received Faxes" or "MyFax Sent Faxes" tab to your Salesforce CRM App. This is performed as follows, for example purposes we will use "MyFax Received Faxes":

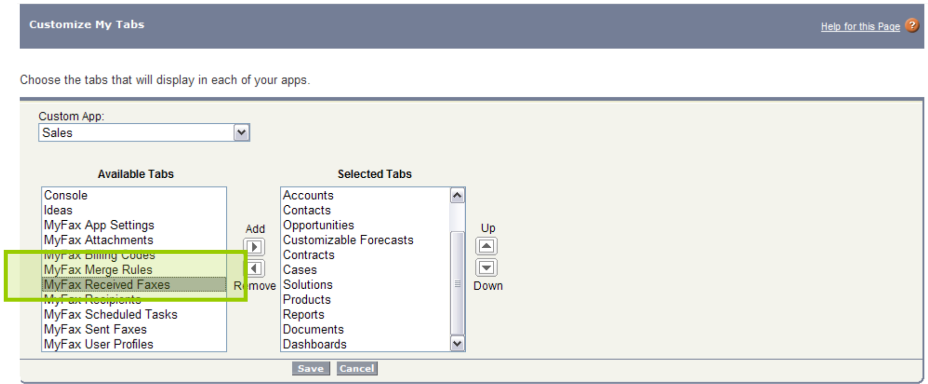
- Select the "+" tab to view all tabs which are available to your App, in this case the Sales App.



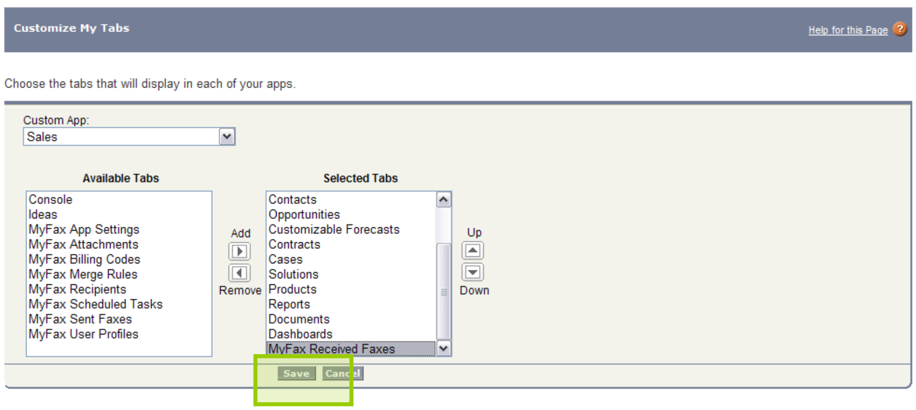

- Select "Customize My Tabs".



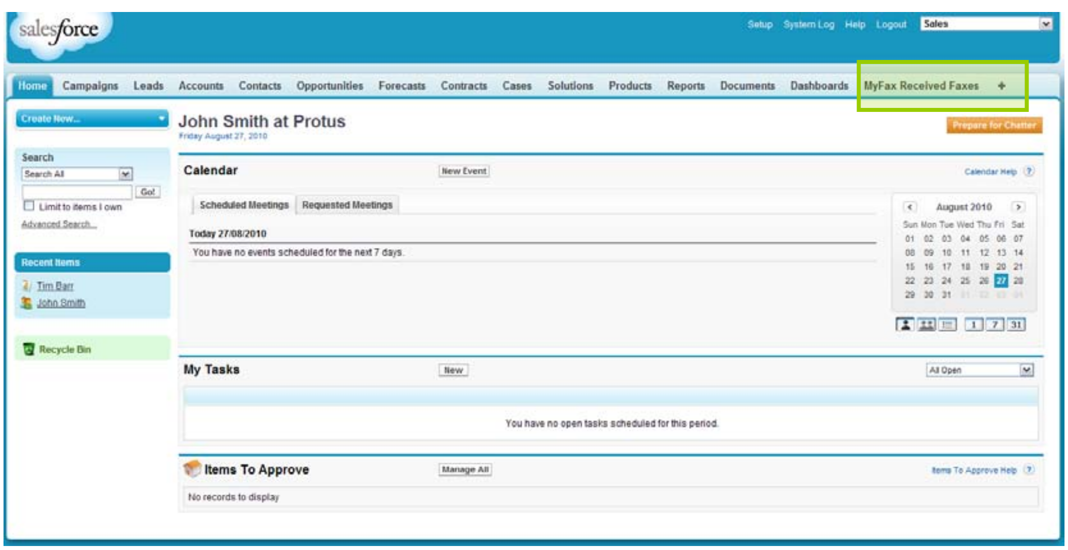
- From the list of "Available Tabs" select "MyFax Received Faxes" and choose "Add" to move it




- Once the tab has been added and your have placed your items in the desired order, select "Save" to commit the changes.




- The "MyFax Received Faxes" tab is now visible in the Sales App view.




**Note:** Additional MyFax tabs can be added to any of your existing Salesforce CRM Apps by following the steps above.

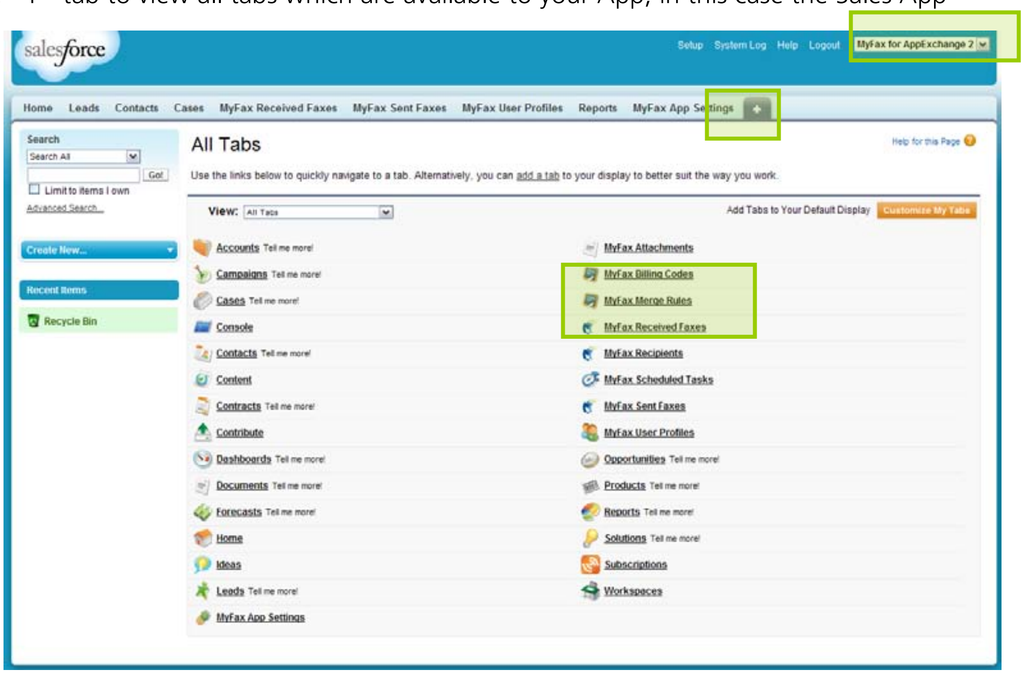
## Dynamic Billing Codes

The Billing Code is a piece of information which can be used for fax identification and tracking purposes.  This information is not displayed on the fax which delivered to the recipient.  This field can be used to track department, bill-back or account information.  This field can then be used to generate fax usage reports based on this information, and are available in both Salesforce CRM and MyFaxCentral.  MyFaxCentral is the name of the MyFax web interface for your online account.  From MyFaxCentral you can send and receive faxes, view account activity reports, update your user profile, download you account statements, and more.

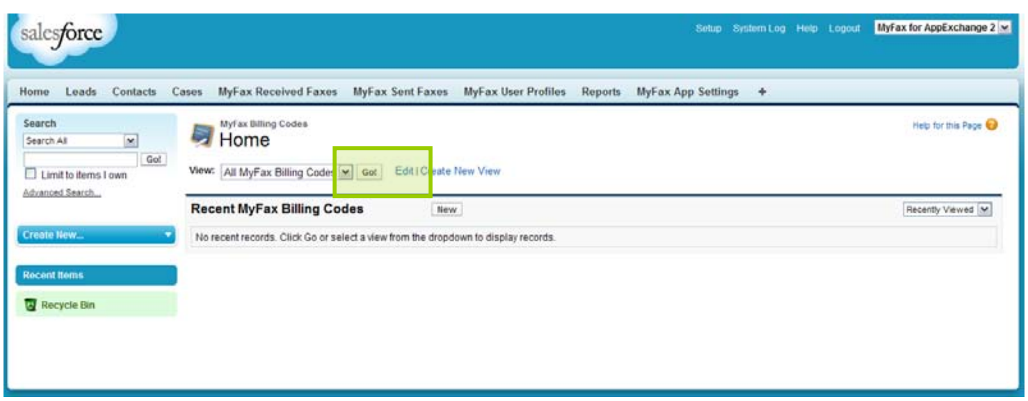
Dynamic Billing Codes allow for the billing code field in the “Send a Fax” or “Send Mass Fax & Email” layouts to be automatically populated with a dynamically merged billing code field based on Salesforce CRM specific information related to the contact who the fax is being sent to.  This billing code can then be used on MyFaxCentral for tracking fax service usage to a specific client, case, etc.

In the following we will show how to setup a basic billing code which will be used as the default billing code whenever faxes are delivered.  To access billing codes perform the following:

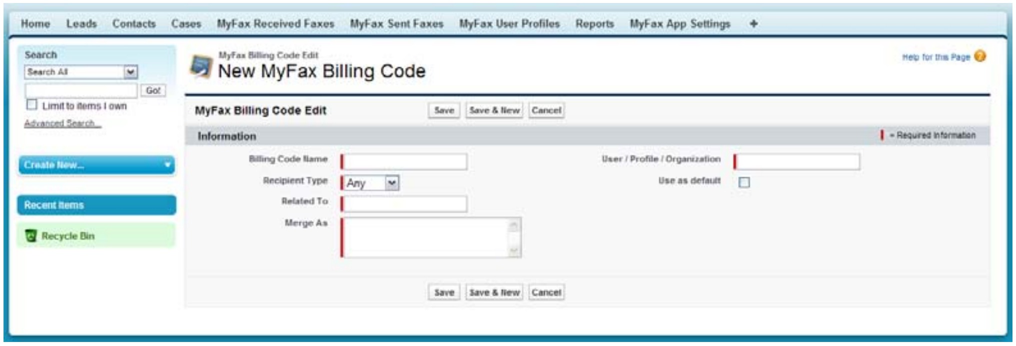
- Select the “+” tab to view all tabs which are available to your App, in this case the Sales App




- Select “New” to create a new billing code entry.

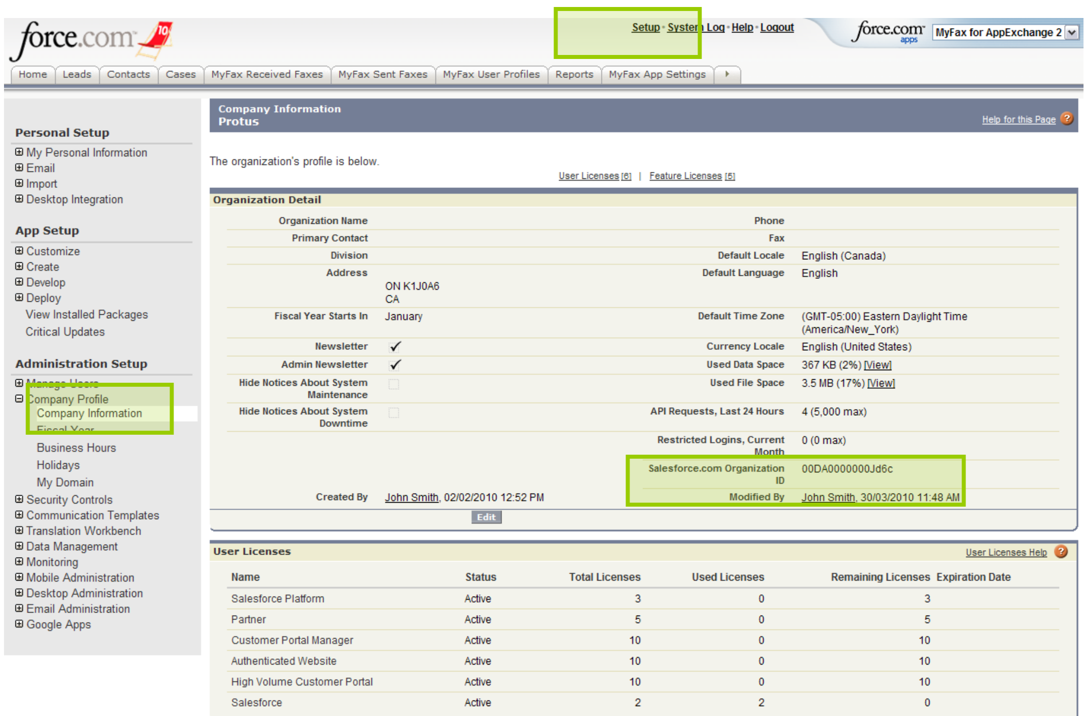


- The following fields are presented to create a dynamic billing code entry



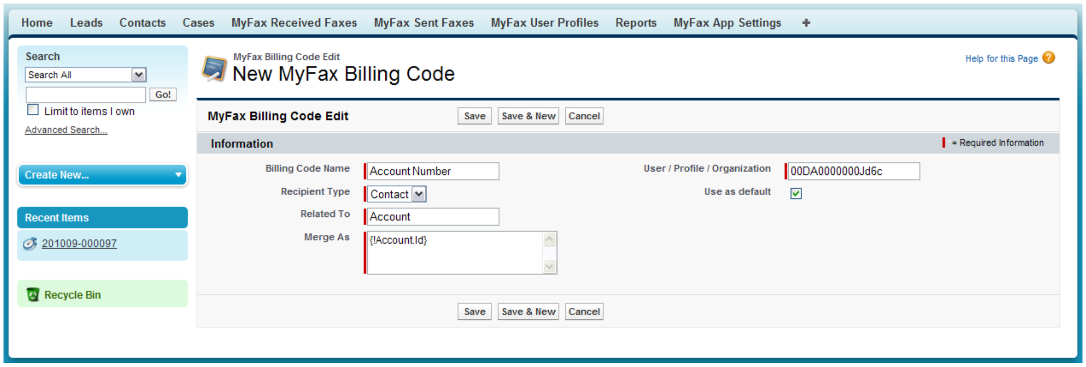
**Note:** To access you organization ID, perform the following:

- Select "Setup"
- Choose "Administration Setup"
- Click "Company Information"
- Copy the "Salesforce.com Organization ID"

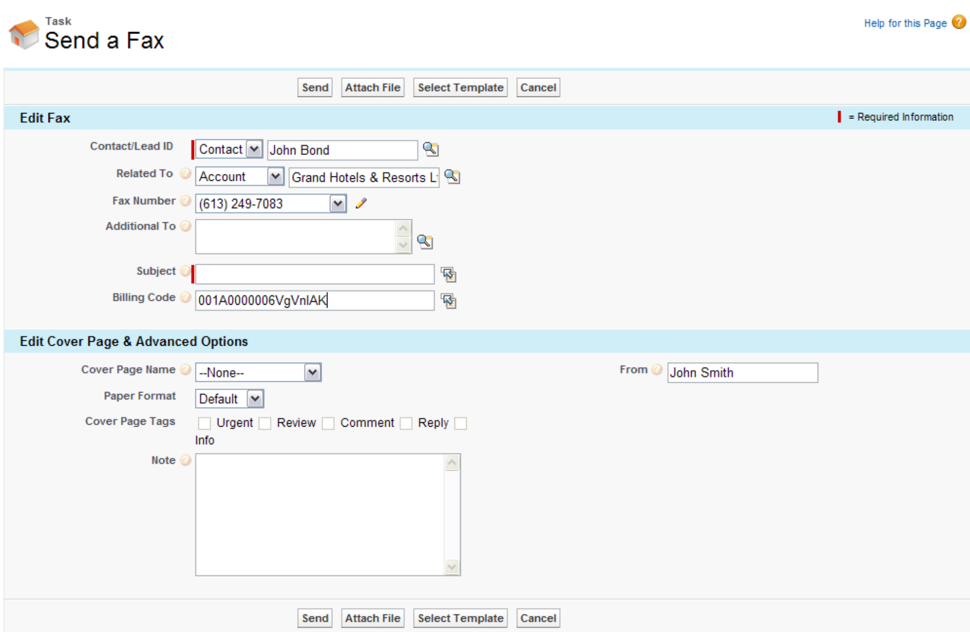


Populate the following information, in addition to the Organization ID in order to create the new dynamic billing code entry:

- **Billing Code Name:** A name of your choice to identify the billing code you are creating
- **Recipient Type:** The recipient type as the basis for this billing code
- **Related To:** Where to pull additional merge information from
- **Merge As:** The standard Salesforce CRM merge rules to create the content for the billing code.
- **User / Profile / Organization:** Populate the ID of those who are to use this billing code
- **Use as default:** Selecting this will populate the billing code by default whenever you send a fax



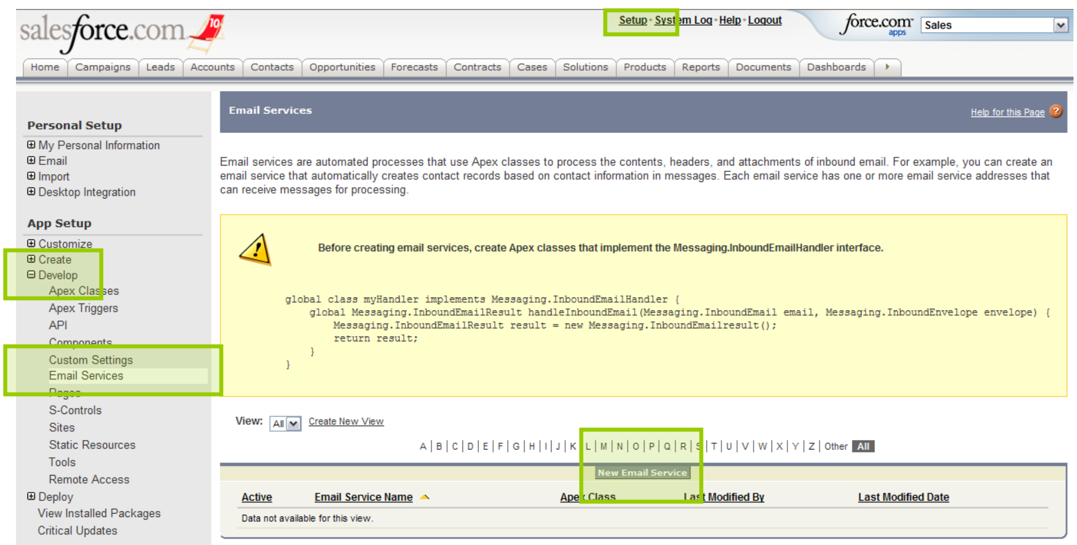

- Because you have made the billing code the default, the next time you send a fax it will automatically be populated with the desired information. The billing code field supports a maximum of 128 characters, which can be edited at any time. Any characters over the 128 character maximum will be truncated.



## Salesforce CRM Received Fax/Email Handler

If the size of your received fax images exceeds 750 KB, you will need to configure the inbound email handler to deliver fax image content, as Salesforce CRM only allows documents of size 750 KB to be delivered via web services. The email handler and web services can operate in parallel with messages being pushed via email which cannot be received via web services. To begin configuring received fax via email, complete the following:

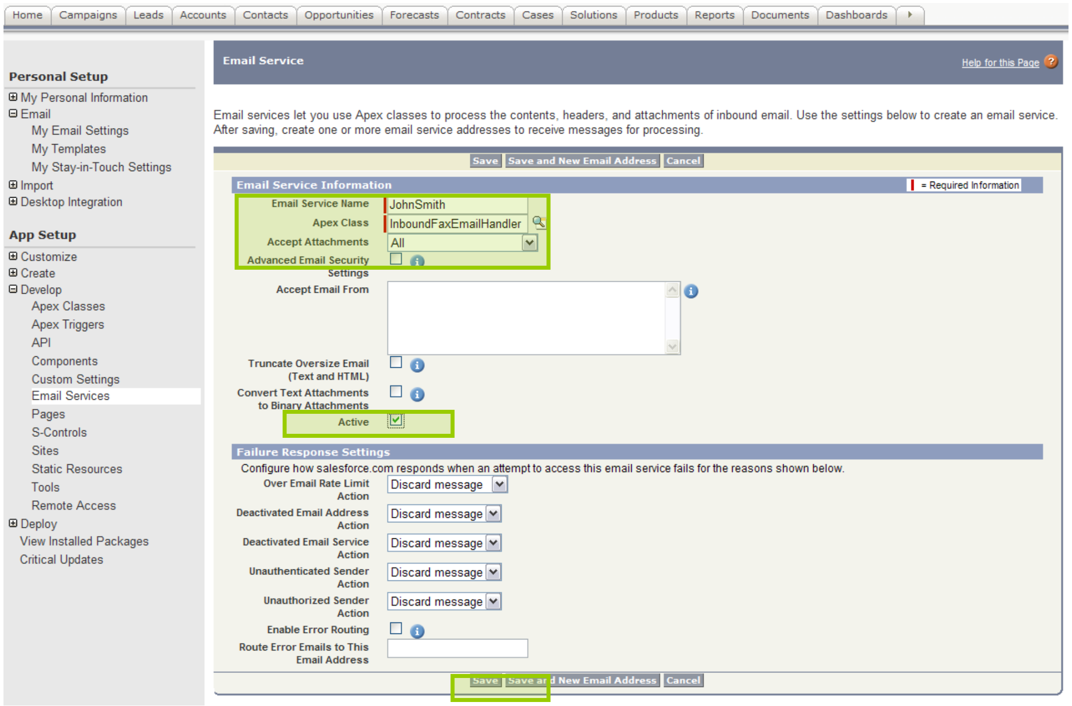
- Select “Setup”.
- From “App Setup” choose “Develop”.
- Select “Email Services”.
- Choose to create “New Email Service”.



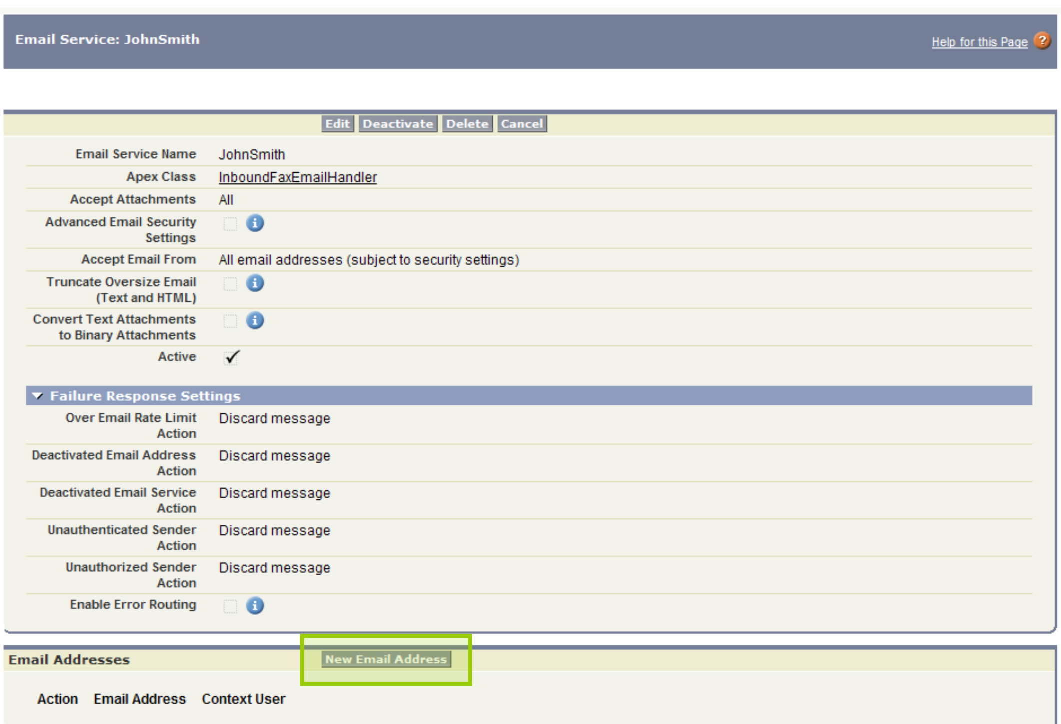

In the new email service configure the following:

- Email Service Name: **JohnSmith** - Use the Salesforce CRM user name (or something similar)
- Apex Class: **InboundFaxEmailHandler** (this is the component responsible for capturing faxes)
- Accept Attachments: **All**
- Activate the service: **Yes**

Once that information has been populated, save this “Email Service” by selecting “Save”.



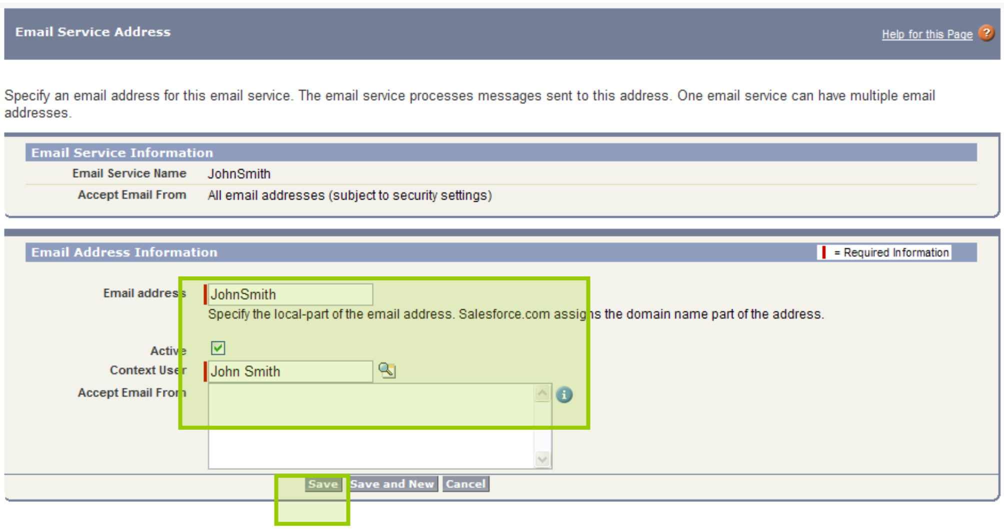
The following Email Service has now been configured to handle incoming faxes. The next step is to add a new email address to be used by this handler, select "New Email Address".



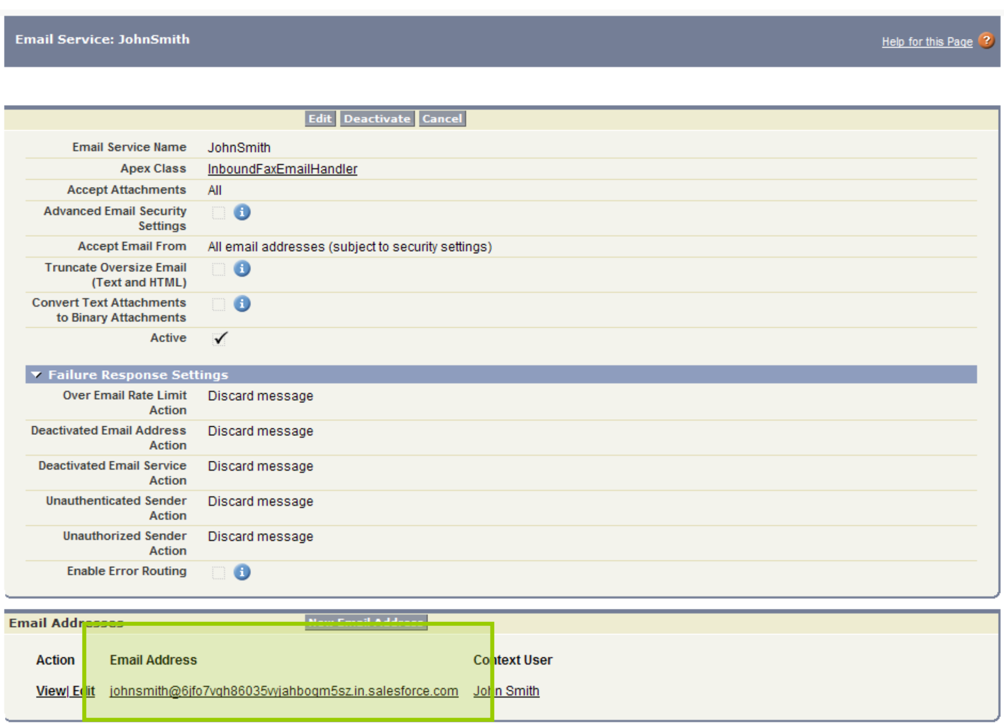
To add an Email Service Address:

- Specify the local part of the email address: **JohnSmith** – In this example
- Activate the Service:  **Yes**
- Context User:  **John Smith** - The Salesforce CRM User who incoming messages at this address will be directed to
- Accept Email From:  **Left blank** - To accept messages from any address

Once that information has been populated, save this Email Service by selecting "Save".

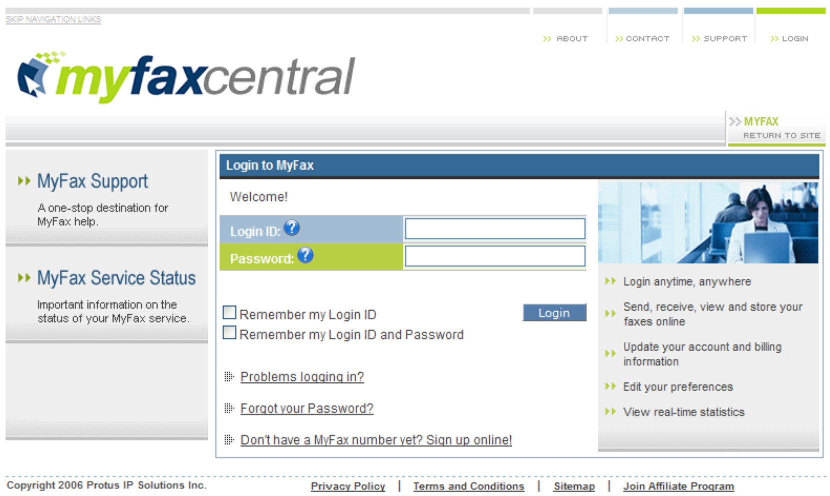



Configuration of the email handler for this user is now complete.  Take note of the email address which has been generated as it will be populated in MyFaxCentral to direct incoming messages to your Salesforce CRM user.

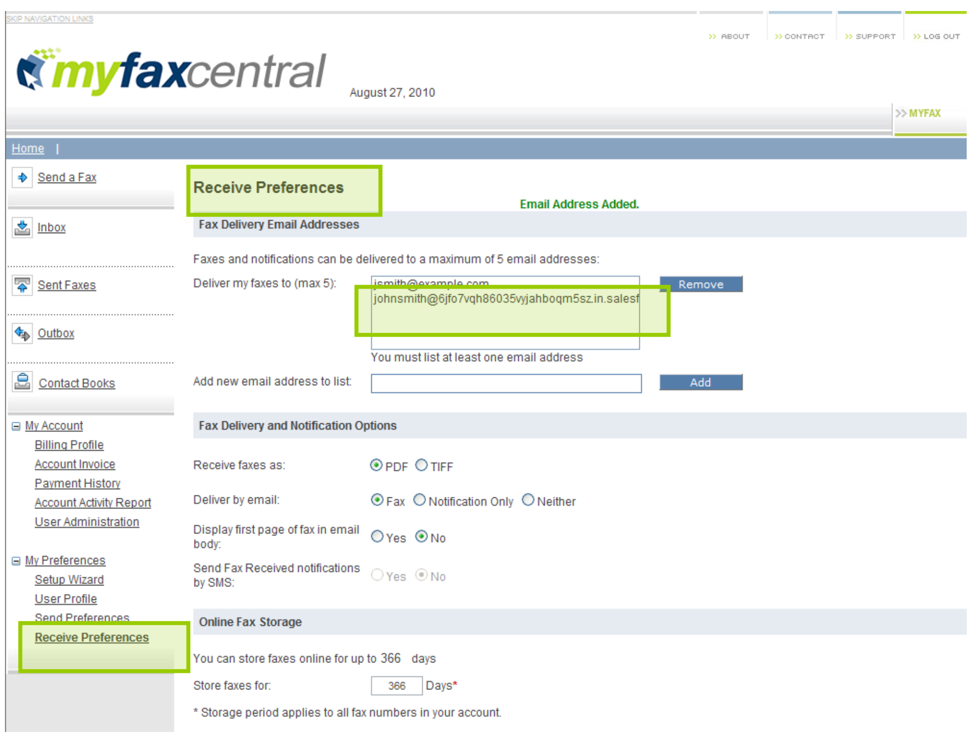


## MyFaxCentral Receiving Preferences

In order for mail to be delivered to your Salesforce CRM email address, you need to update your MyFax receive preferences. You can access your MyFaxCentral account from the following: **https://secure.myfax.com**. Enter your MyFax credentials to access your fax "Receive Preferences".




Add the email address to your receive preferences which was generated by Salesforce CRM.

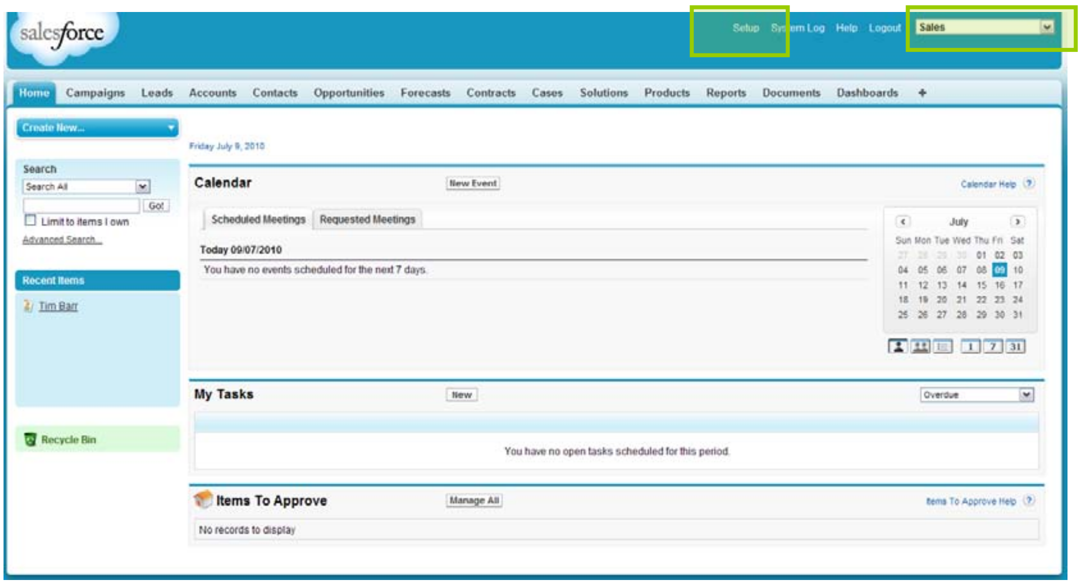



Once this is complete, any new faxes which are received on your fax number will be directed to this Salesforce CRM email address and fax record information will automatically be added to Salesforce CRM.

## Appendix B: Confirming/Configuring Access Rights to MyFax

### Change to Sales App

Ensure you are still accessing Salesforce CRM with administrative privileges. In the upper right select "Sales" from the drop-down menu to select the Salesforce CRM "Sales" App. Your view will update to present the default tab options provided by the Salesforce CRM Sales App. Choose "Setup" to begin confirming App settings.




### Reviewing Remote Site Settings

In order to use Salesforce CRM with MyFax, it is necessary to add connectivity to MyFax Web Services within Salesforce CRM. The administrator was prompted to allow this during the installation, but if this step is missed, the user will receive an error message when they attempt to send a fax.

To view Salesforce CRM to access to a remote site, for connection or services, such as those used by MyFax for AppExchange 2, complete the following steps:

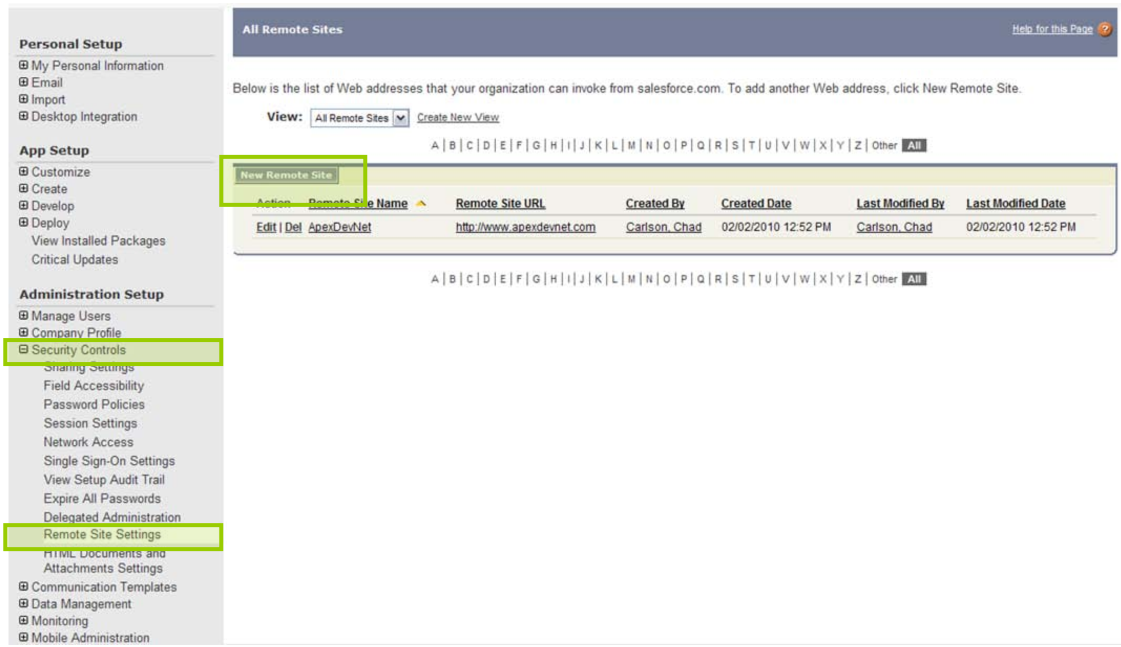
- From "Setup" choose "Security Controls".
- Select "Remote Site Settings".
- If successful at the time of installation, the following remote site information should be listed as shown below.

New Remote Site

| Action | Remote Site Name | Namespace Prefix | Remote Site URL | Active | Created By | Created Date | Last Modified By | Last Modified Date |
|---|---|---|---|---|---|---|---|---|
| Edit \| Del | MyFaxForAppExchange2 | myfaxv3 | https://ws.myfax.com | ✓ | Smith, John | 01/09/2010 8:29 AM | Smith, John | 01/09/2010 8:29 AM |

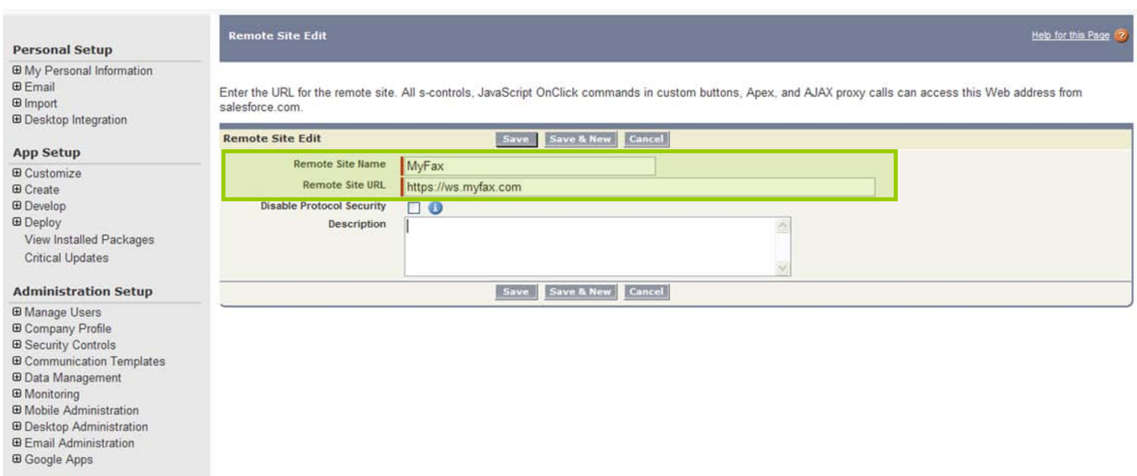
If the site was not selected to be added during install, it can be added/removed at any time by performing the following:

- Click “New Remote Site”.



Enter the following manually to create the remote site connection required by MyFax for AppExchange 2:

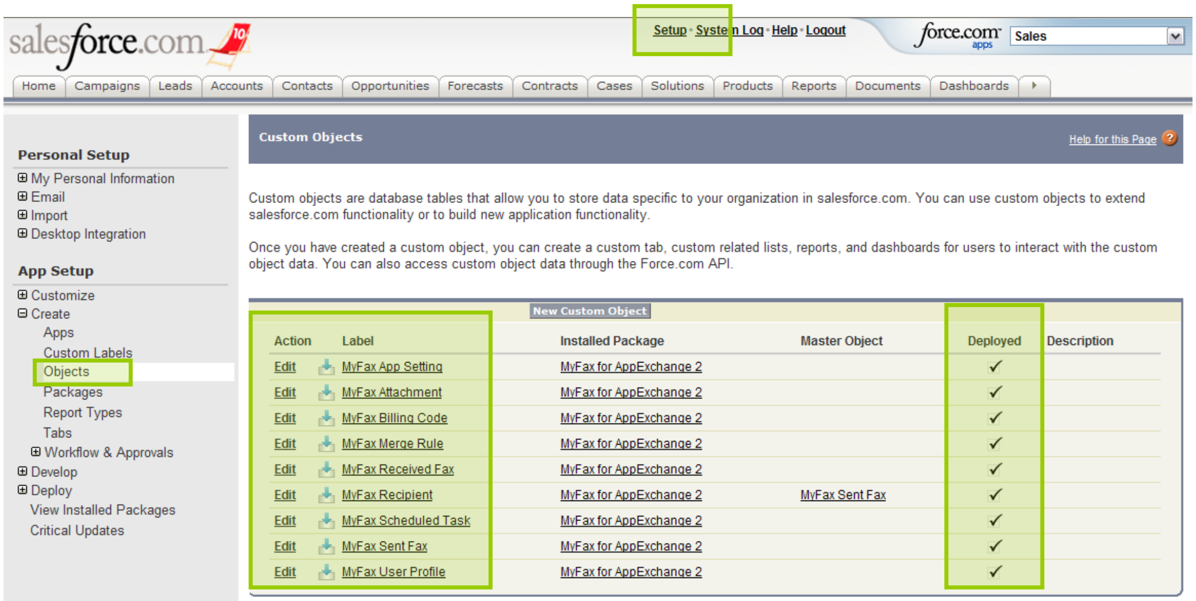
- Provide a “Remote Site Name” of “MyFaxForAppExchange 2”.
- Input a “Remote Site URL” of **“https://ws.myfax.com”**.
- Save the new remote site by clicking “Save”.



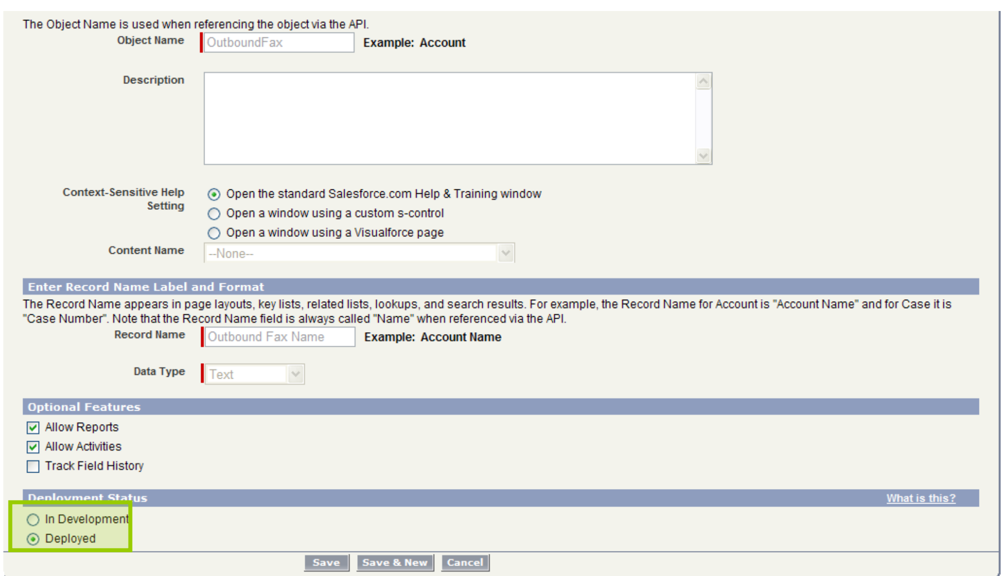
## Confirm MyFax Object Deployment Status

In order to ensure users without administrative rights have access to MyFax, the administrator of the Salesforce CRM Org needs to ensure that the custom MyFax objects are in the "deployed" state. This is performed by checking the following settings:

From Setup, choose "Create" and select the "Objects" menu item. Nine "MyFax" custom objects will have been added with the installation of MyFax. For each of these objects, confirm the deployment status is "Deployed".




All objects should be set to the deployed state, to allow non-administrative users access to the MyFax App. If they are not, deployment status is configured at the bottom of the "Edit" page for each object as indicated in the following.



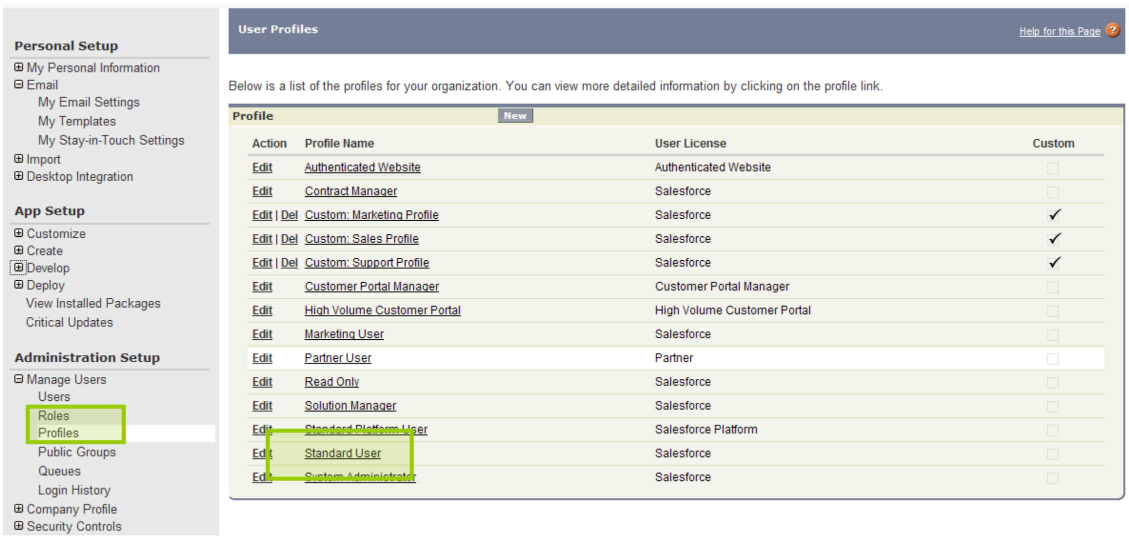

Or as shown previously, to deploy all objects for the installed package, select "Setup", "View installed Packages", and select the MyFax package and choose "Deploy".

## Create User Profile with Fax Object Access Rights (Enterprise and Unlimited Editions)

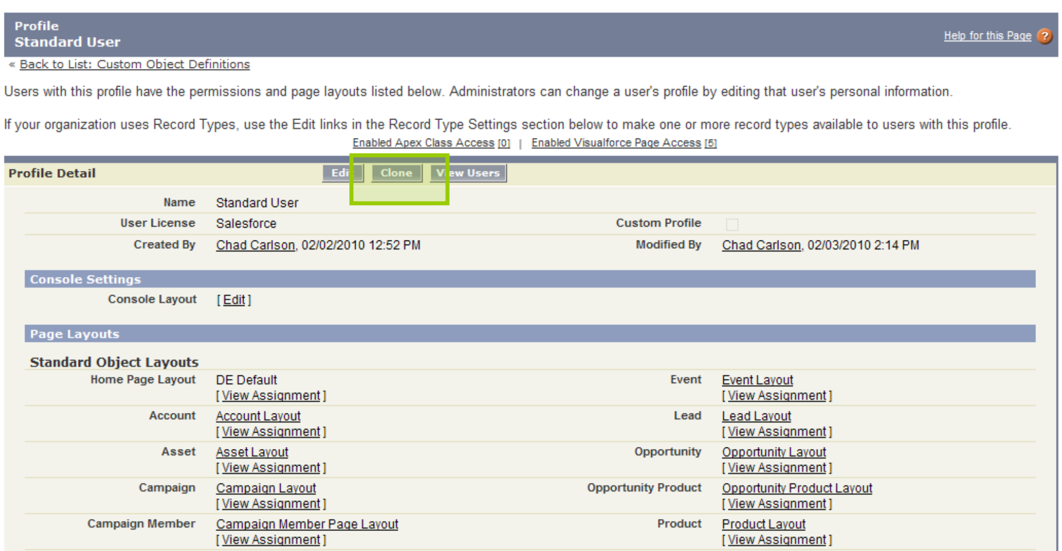
Starting in Salesforce Spring '10 for Enterprise and Unlimited editions, user access to any custom object requires the creation of a new User Profile to support access rights to the custom objects used by any custom App.  Professional and Group Editions are not effected, as they do not allow for the creation or use of Profiles.

Custom profiles can be created by generating a clone of the existing user profile and update of the access rights to the custom objects as follows:

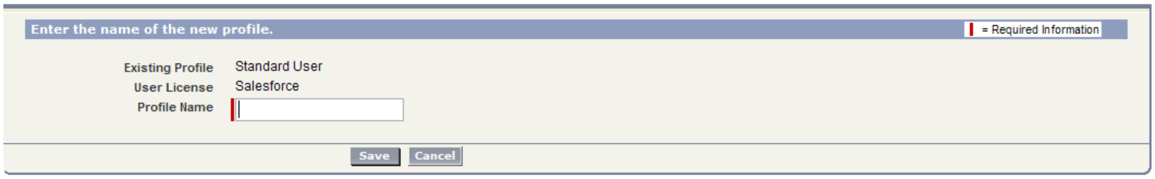
From "Administrative Setup", "Manage Users", "Profiles", choose the profile to be cloned.  If the profile is already a custom profile, then edit the existing custom profile.




Select Clone.

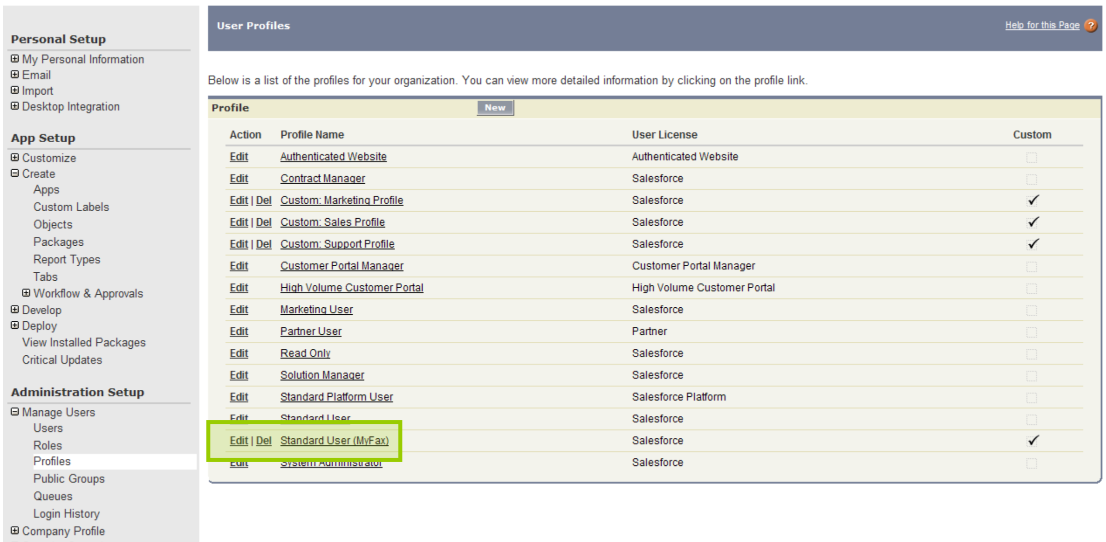


Enter the name for the new profile, for example:  Standard User (MyFax).

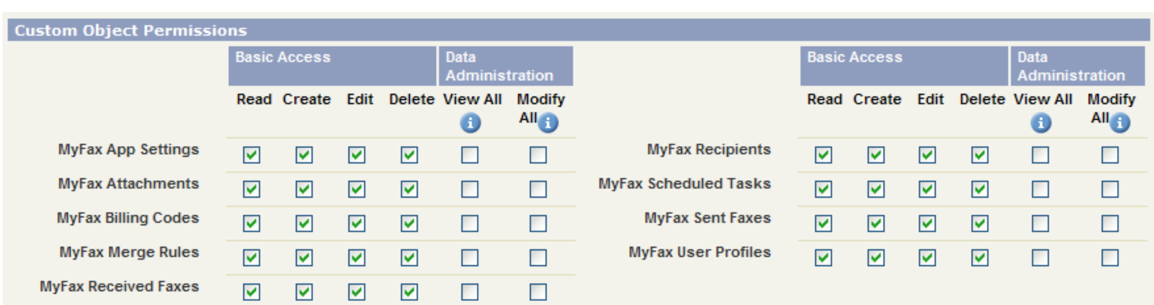



Adjust the access rights for the MyFax objects as follows:

- Select "Edit" for the newly created profile.




- Update the rights for the "MyFax" custom objects as indicated below, or which best meet your organizational requirements.



Custom Object Permissions

| | Basic Access | | | | Data Administration | |
|---|---|---|---|---|---|---|
| | Read | Create | Edit | Delete | View All | Modify All |
| MyFax App Settings | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Attachments | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Billing Codes | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Merge Rules | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Received Faxes | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Recipients | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Scheduled Tasks | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax Sent Faxes | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |
| MyFax User Profiles | ☑ | ☑ | ☑ | ☑ | ☐ | ☐ |

This profile can now be assigned to any standard users who require access to MyFax.

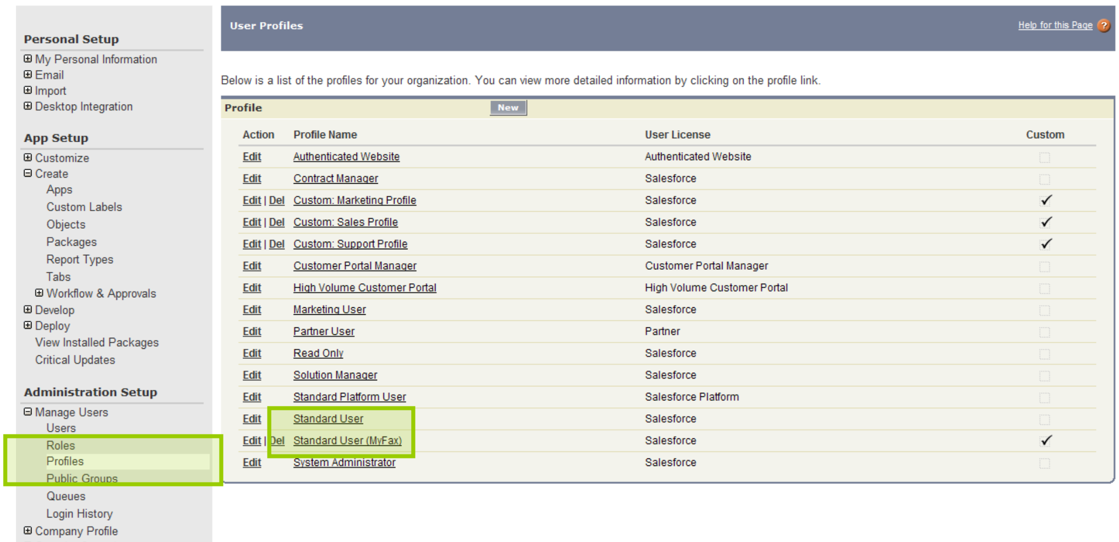
**Note:** Standard Users do not require access to: "MyFax App Settings", "MyFax Attachments", "MyFax Billing Codes", "MyFax Merge Rules", "MyFax Scheduled Tasks", and "MyFax User Profiles" objects.  These objects are used for account administration, which are not required to be presented to Standard Users, as they are not required feature interfaces.

## Update Administrator Report Layout

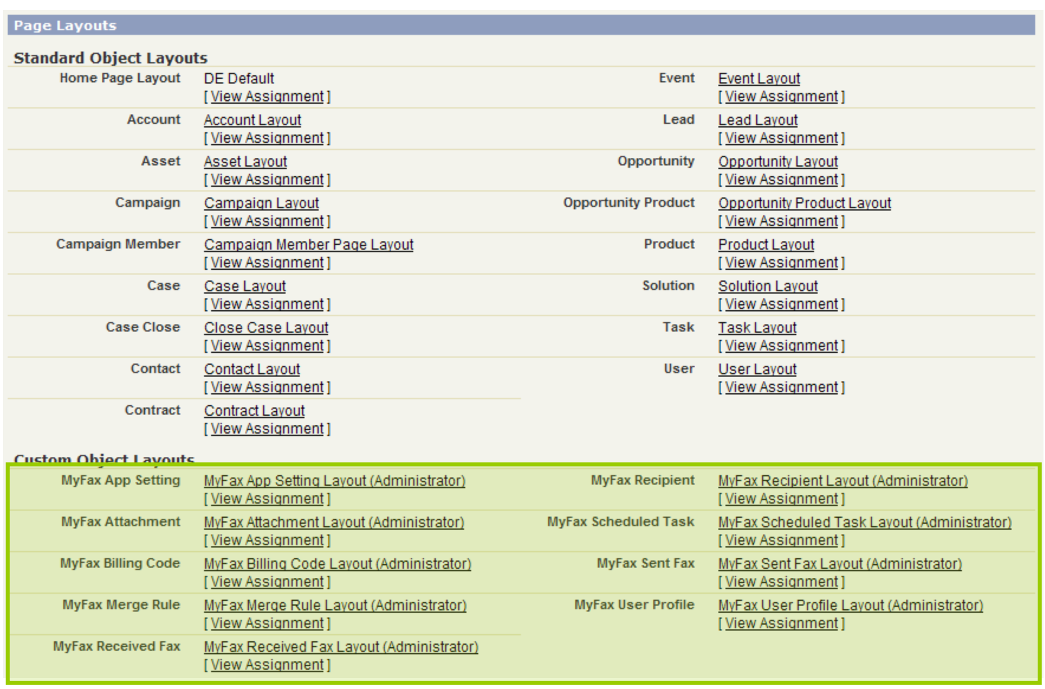
The administrator layout has visibility to additional information in fax status reporting which may not be desirable for all users to access.  To simplify this configuration an additional layout option has been provided and can be applied to those users who do not require access to this information.

By default all users are configured to use "Administrator" MyFax layouts.  In order to display less detailed information, standard users can be updated to use the "User" MyFax layouts.

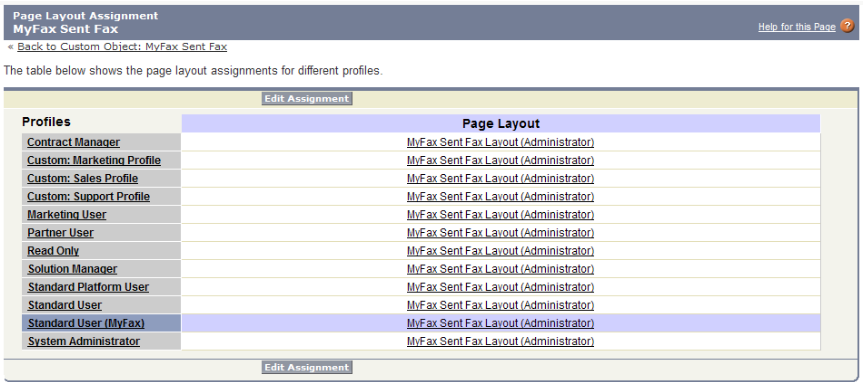
This can be updated from the following location in "Setup". In this example we will choose to update a Standard User by choosing "Standard User (MyFax)".



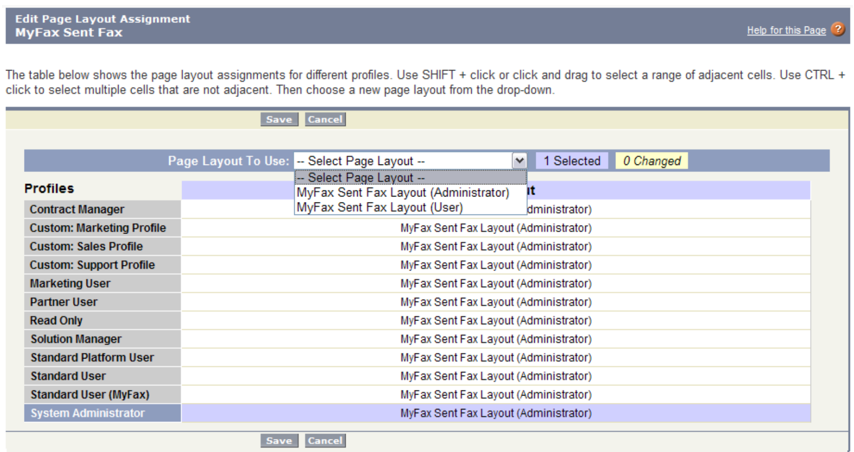

Choose "View Assignment" for any of the MyFax custom object layouts which you wish to update for your standard users.



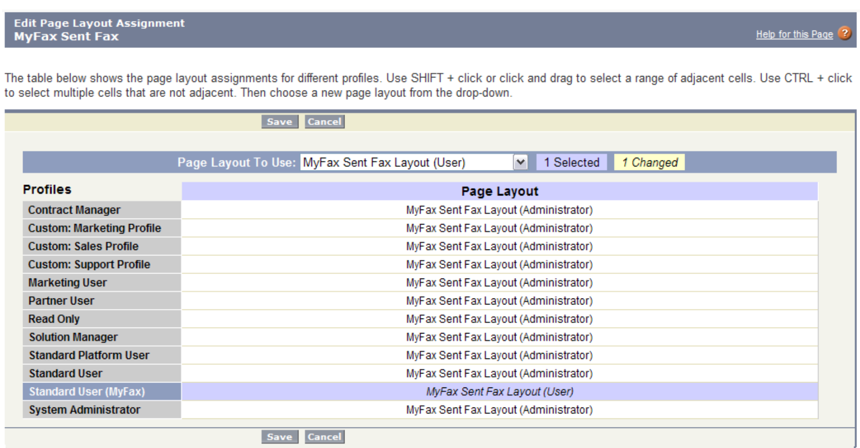
For example, Edit and update to use MyFax Sent Fax Layout (Administrator) to MyFax Sent Fax Layout (User).
Select the "Standard User (MyFax) and choose "Edit Assignment".




Select the MyFax Send Fax (User) layout.




Save the layout settings.

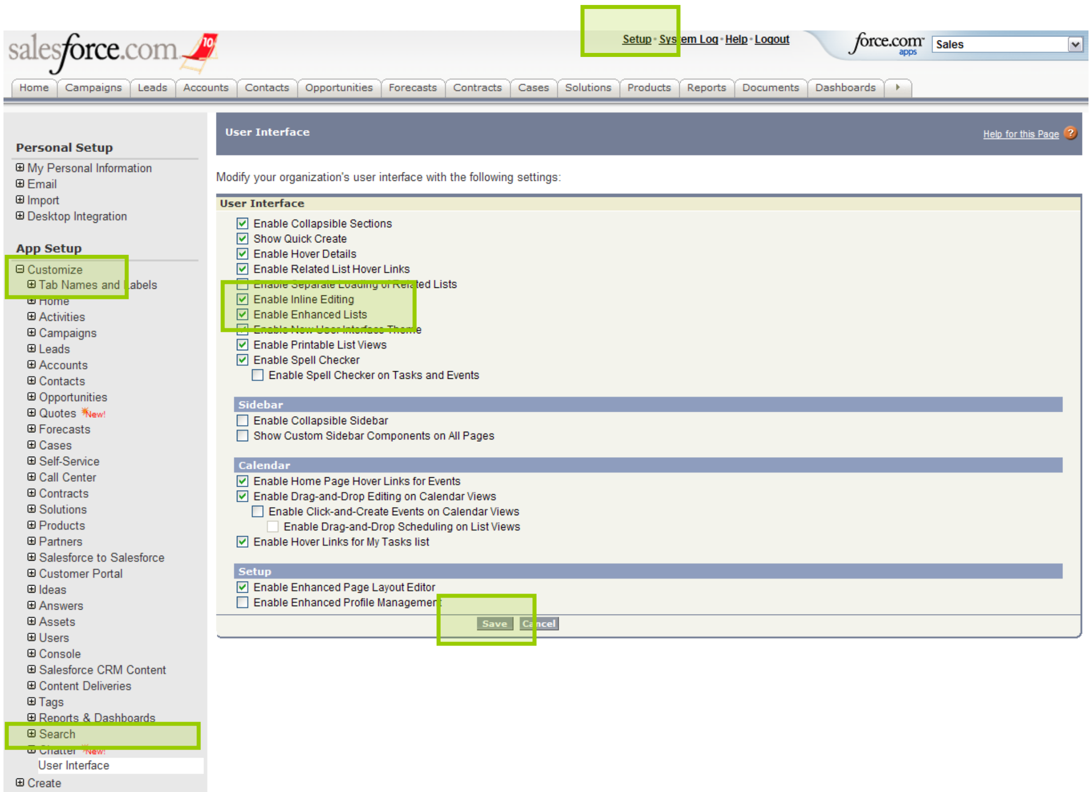



The layouts for additional custom objects; "MyFax Recipient", "MyFax Received Fax", etc., can be updated in exactly the same manner as was performed in this example.

## Confirm Enhanced Lists are Enabled

In order to use list selection when sending Mass Fax & Email, ensure that you have "Enabled Enhanced Lists" and "Enabled Inline Editing" as follows:

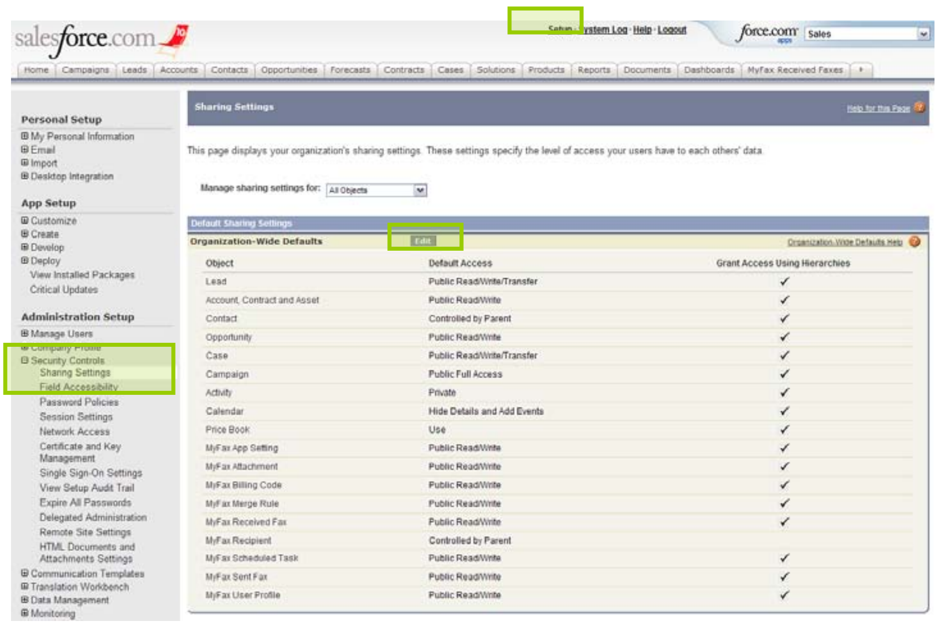
- Accessible from "Setup", "Customize", "User Interface".
- Select "Enable Inline Editing".
- Select "Enable Enhanced Lists".
- "Save" your configuration changes.



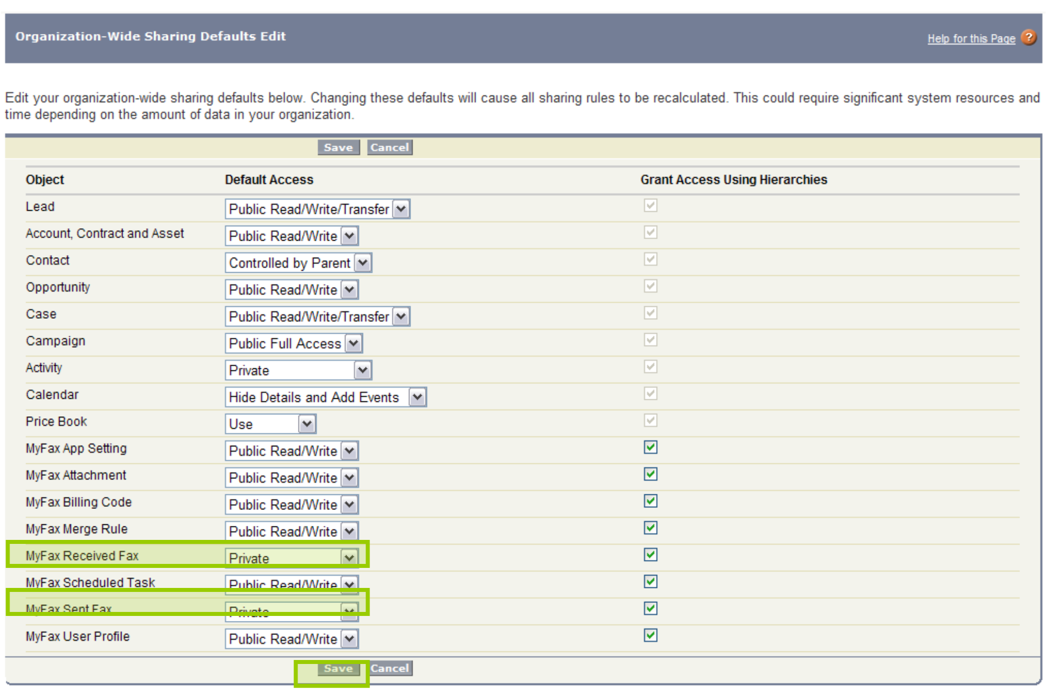
## Enabling User Privacy for Faxing

In some cases it may be desirable to restrict users from viewing the faxes which other users send or receive.  In order to accomplish this, you must update the privacy settings on the MyFax objects as follows:

- Select "Setup".
- From "Administration Setup" choose "Security Controls"
- Select "Sharing Settings"
- Choose "Edit" to configure the sharing privileges for the MyFax objects




Choose the "MyFax Objects you wish to edit, in most cases "MyFax Received Fax" and "MyFax Sent Fax".  Select save to commit your changes.



# Appendix C: Upgrade and Uninstall

## Upgrading to MyFax for AppExchange 2

If you are running the previous version of MyFax for AppExchange (Spring '10), please ensure you have completed the following before installing MyFax for AppExchange 2 (Fall '10).

**Note:** MyFax for AppExchange 2 is installed in a completely new namespace and can be installed in parallel to your existing MyFax for AppExchange 2 implementation. However, in order to simplify the management of the new installation, it is recommended to remove any "MyFax" buttons from the previous release prior to the installation of this most recent version.

To upgrade from the existing version of MyFax for AppExchange (Spring '10) compete the following steps:

1. Remove the MyFax buttons, "Send a Fax" and "Update Fax Status" buttons which you have added to your layouts for "MyFax for AppExchange (Spring '10)".
2. Install "MyFax for AppExchange 2 (Fall '10)".
3. Follow the configuration which is provided in this guide.
4. Confirm you are satisfied with the operation of the new App or contact **myfaxforappexchange@myfax.com** should you have any questions.
5. If you do not feel you require the historical records from "MyFax for AppExchange (Spring '10)", the package can be uninstalled at any time without effecting the operation of "MyFax for AppExchange 2 (Fall '10)".

**Note:** Records can be exported after the App has been uninstalled in order to be archived or imported for future use should your organization require them to be accessible in the future. It is recommended to complete an uninstall in order to remove all unused components from your Org.

## Uninstall

To uninstall MyFax for AppExchange 2 (Fall '10), you can perform the following, when accessing the system as an administrator:

1. Remove any of the MyFax buttons, "Send a Fax", "Send Mass Fax & Email" and "Update Fax Status" buttons which you have installed on your layouts.
2. Confirm no scheduled tasks are currently being executed by the App (Cancel any which may be in progress)
3. Access your "Setup" options and choose "View Installed Packages".
4. You will then be presented with an interface to "Uninstall" MyFax for AppExchange 2 (Fall '10).

**Note:** Uninstalling MyFax for AppExchange 2 will remove all fax records and history from your Salesforce CRM Org, but will leave any tasks created for fax activities in place.