



# Installation, Customization and Upgrade Guide

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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”.

Package Installation Details

Package Name

MyFax for AppExchange 2

Version Name

Fall 10

Version Number

1.0

Publisher

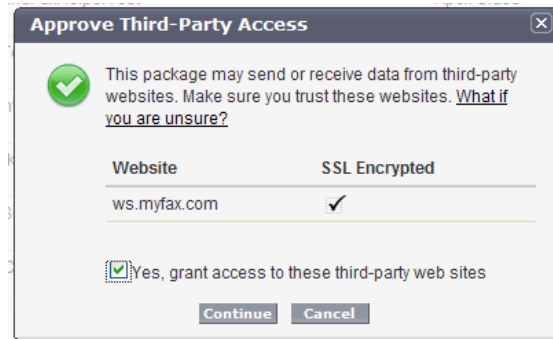
ProtusIP Solutions, Inc.

Continue

Cancel

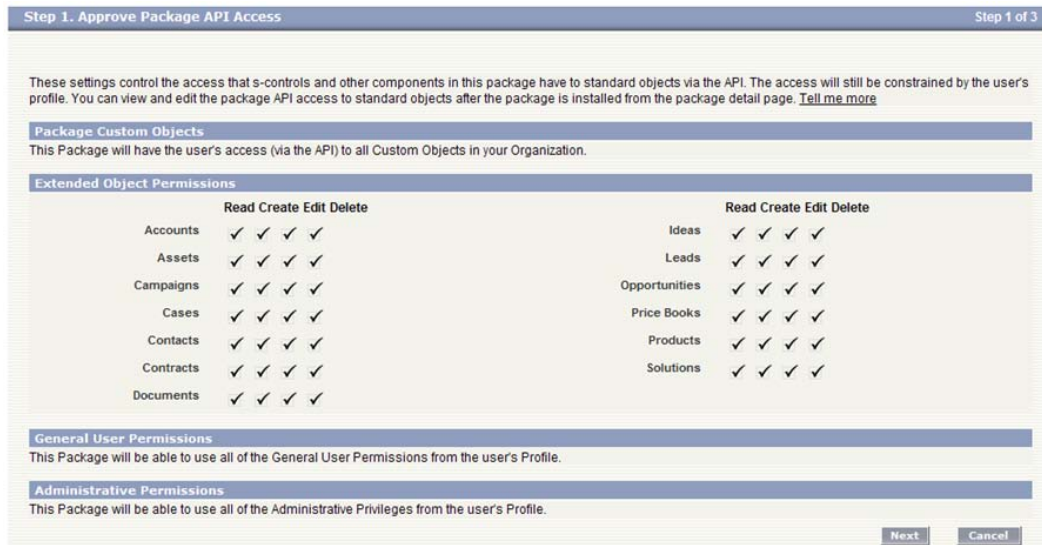
## Approve Third-Party Access

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.



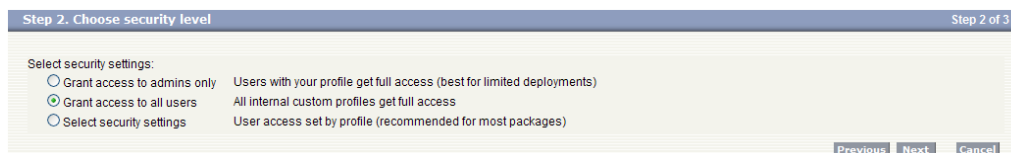
## Approve API Access to the Salesforce Instance

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".



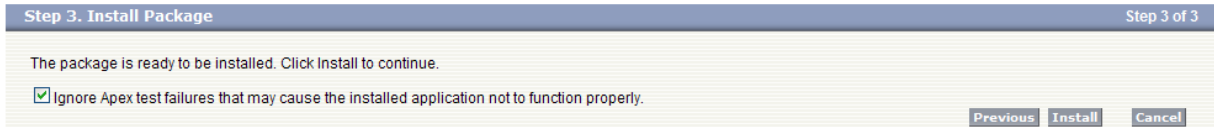
## Choose Security Levels and User Restrictions

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

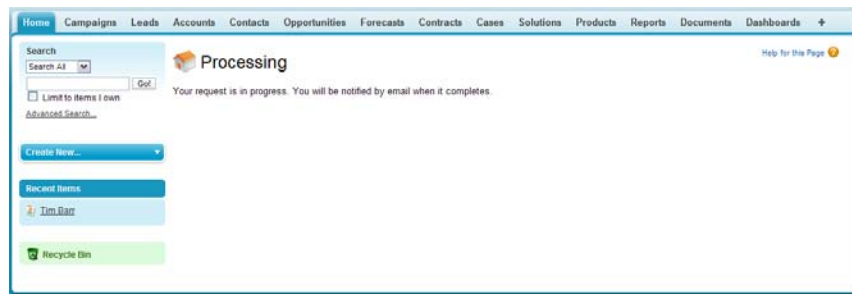
At this point you are ready to install the App. If you feel you need to make adjustments before initiating the install, click “Previous” to return to any of the preliminary configuration pages. If you are happy with your settings, and ready to start using MyFax for AppExchange 2, click the “Install”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



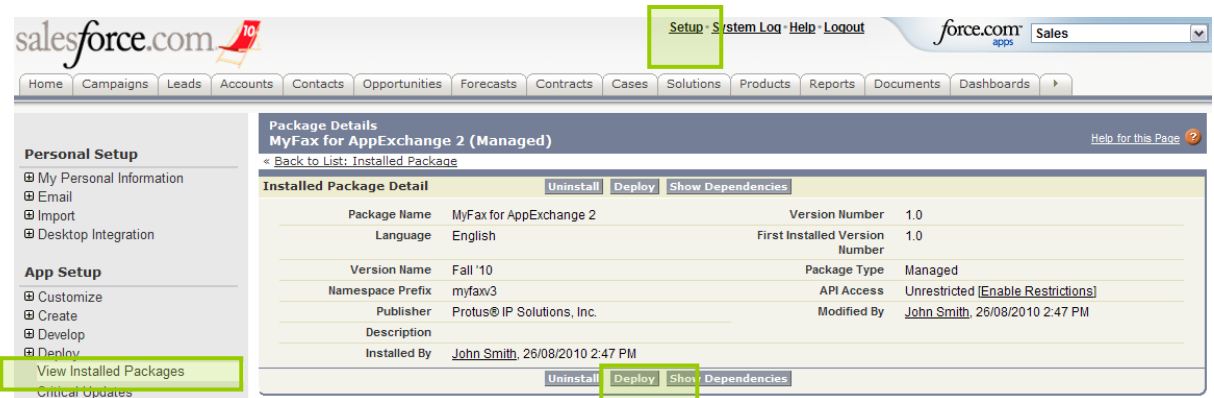
## Deploying the App

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.

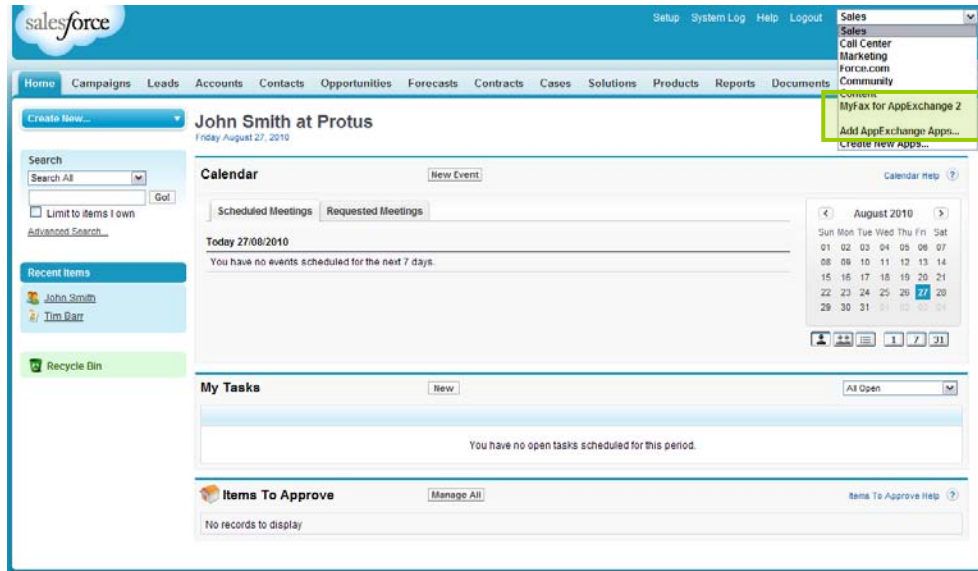
### 3. MyFax App View

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.

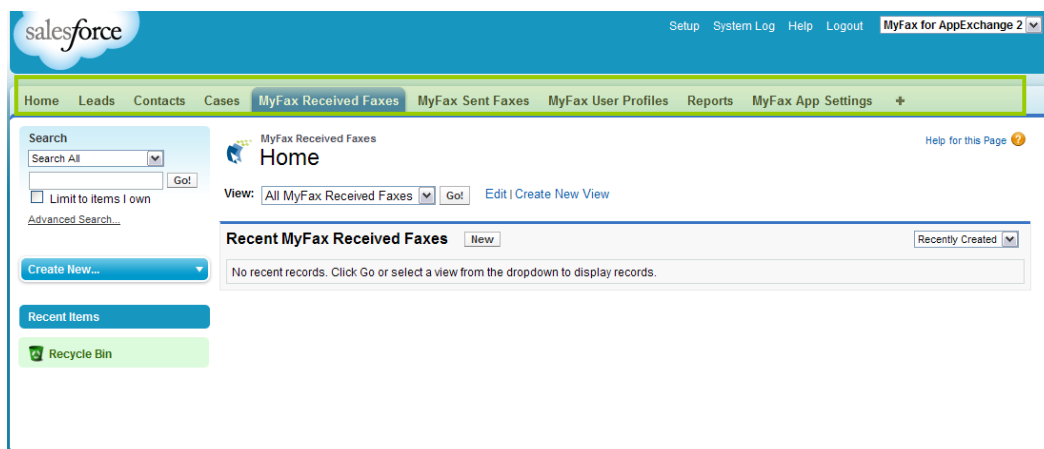
Later in this document we will explain how to easily integrate MyFax into your existing Sales, Call Center or Marketing Apps, to provide a level of customization which best meets your needs.

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.

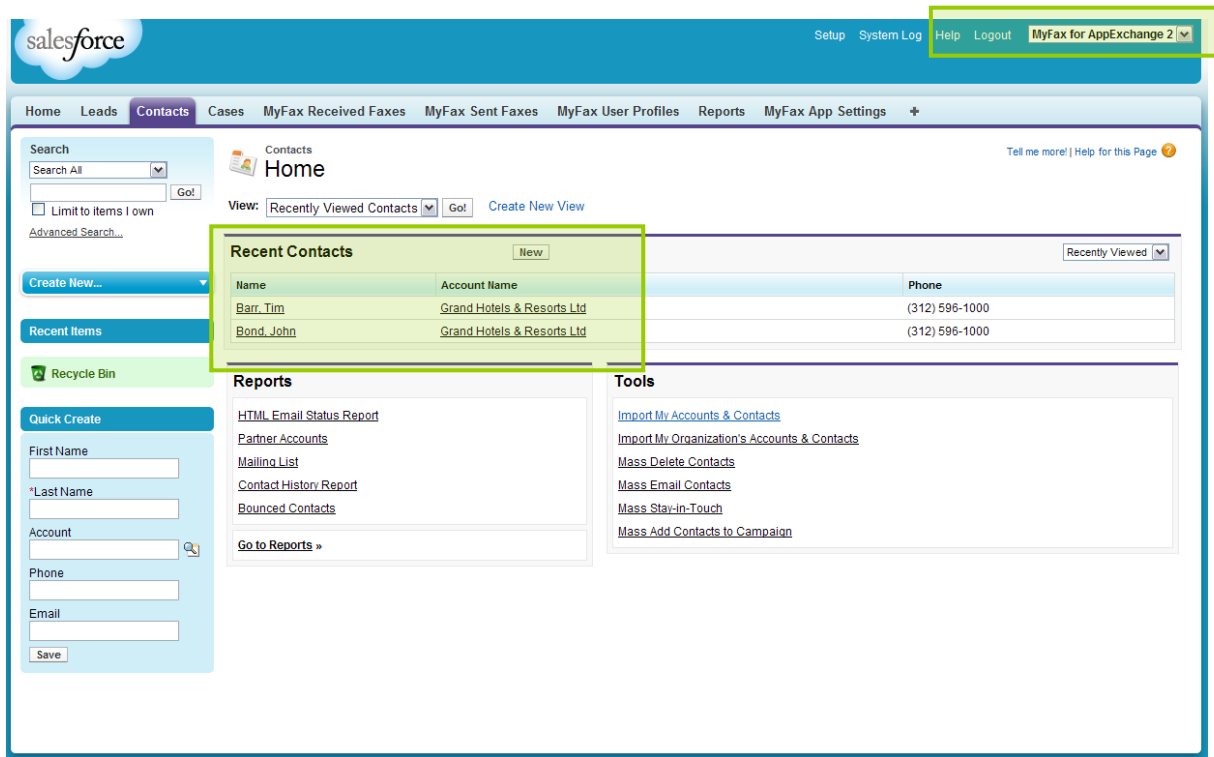
### Select the Tab to Present MyFax

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.

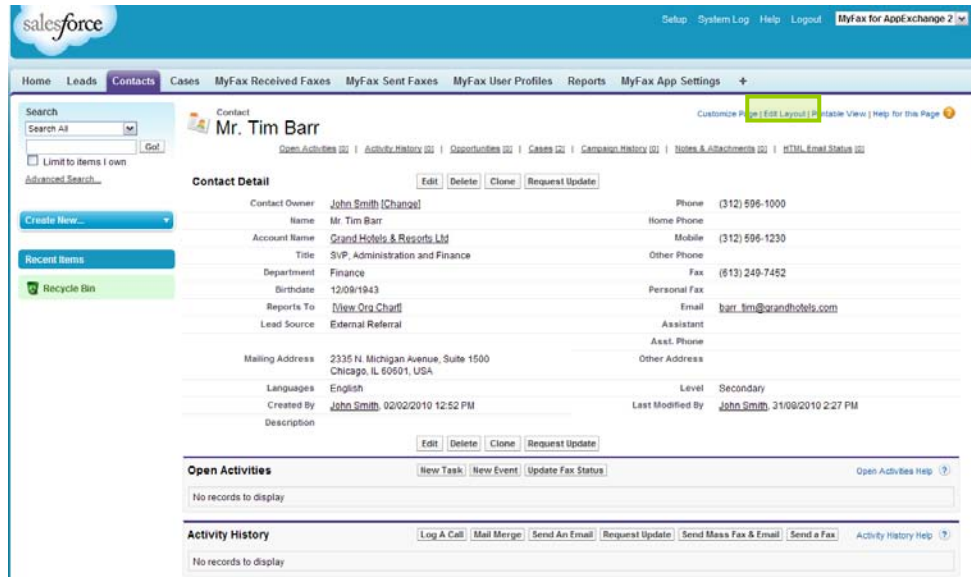




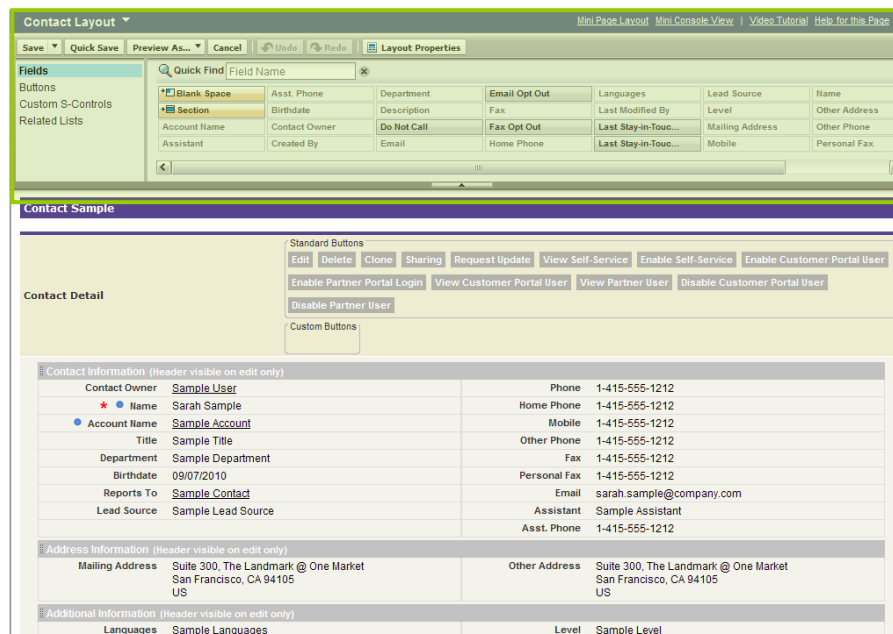
## Edit Page Layouts to Include MyFax for AppExchange 2 Buttons

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.

The screenshot shows a CRM interface with a sidebar on the left containing 'Fields', 'Buttons', 'Custom S-Controls', and 'Related Lists'. The main area displays a form with sections: 'Additional Information', 'System Information', 'Description Information', and 'Custom Links'. Below these is the 'Open Activities' section, which is highlighted with a green box. It contains a table with columns: Subject, Related To, Task, Due Date, Status, Priority, and Assigned To. The table has one row with data: Sample Subject, Sample Related To, ✓, 04/02/2010 2:12 PM, Sample Status, Sample Priority, and Sarah Sample. Below the table are sections for 'Activity History' and 'Opportunities'.

Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Subject	Sample Related To	✓	04/02/2010 2:12 PM	Sample Status	Sample Priority	Sarah Sample

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

The screenshot shows a dialog box titled 'Related List Properties - Open Activities'. It has a 'Columns' section with a list of available fields and a list of selected fields. Below this is a section for 'Apply column information to other page layouts' with three checked options: 'Select All', 'Contact (Marketing) Layout', and 'Contact (Sales) Layout'. At the bottom is a 'Buttons' section with a green box highlighting a '+' icon.

**Available Fields:** All-day, Assigned Alias, Assigned First Name, Assigned Last Name, Assigned Role, Call Duration, Call Object Identifier.

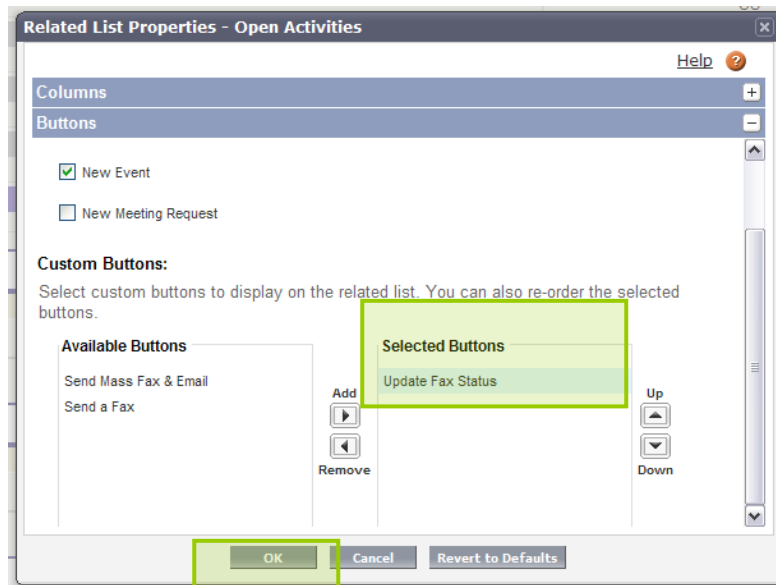
**Selected Fields:** Subject, Related To, Task, Due Date, Status, Priority, Assigned To.

**Apply column information to other page layouts:**

- ☒ Select All
- ☒ Contact (Marketing) Layout
- ☒ Contact (Sales) Layout

**Buttons:** +

- ▶ 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”.

The screenshot shows the Salesforce interface. At the top, there is a "Quick Find" bar and a "Fields" sidebar. The main content area is divided into several sections. The "Open Activities" section is highlighted with a green box and contains a table with columns: Subject, Related To, Task, Due Date, Status, Priority, and Assigned To. The "Activity History" section is also highlighted with a green box and contains a table with columns: Subject, Related To, Task, Due Date, Assigned To, and Last Modified Date/Time. The "Opportunities" section is visible below it.

Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Subject	Sample Related To	✓	04/02/2010 2:12 PM	Sample Status	Sample Priority	Sarah Sample

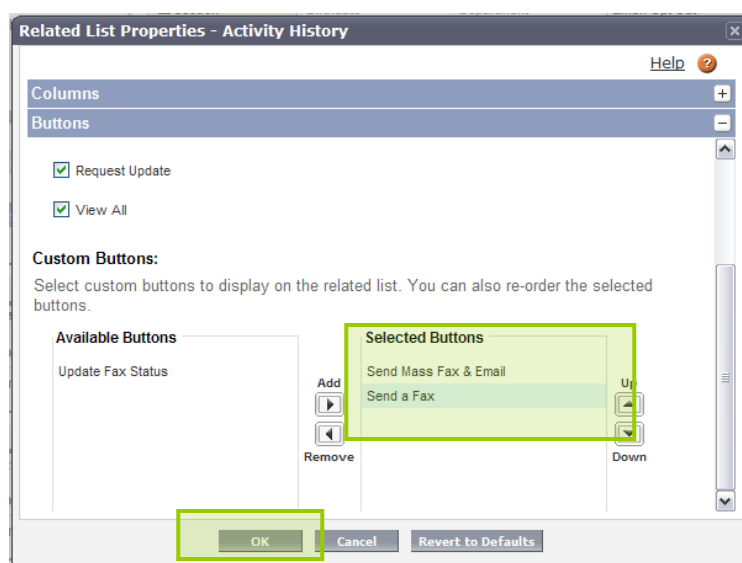
  

Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Related To	✓	04/02/2010 2:12 PM	Sarah Sample	04/02/2010 2:12 PM

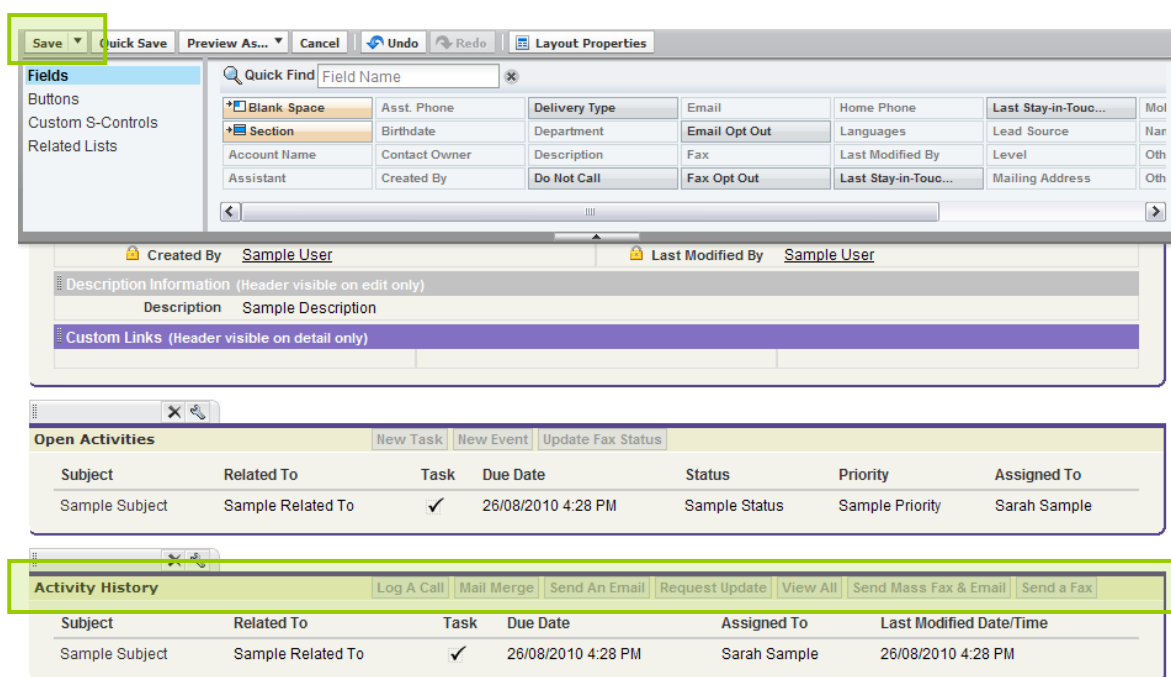
Opportunity Name	Stage	Amount	Close Date
Sample Opportunity Name	Sample Stage	\$123.45	04/02/2010

- ▶ 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.

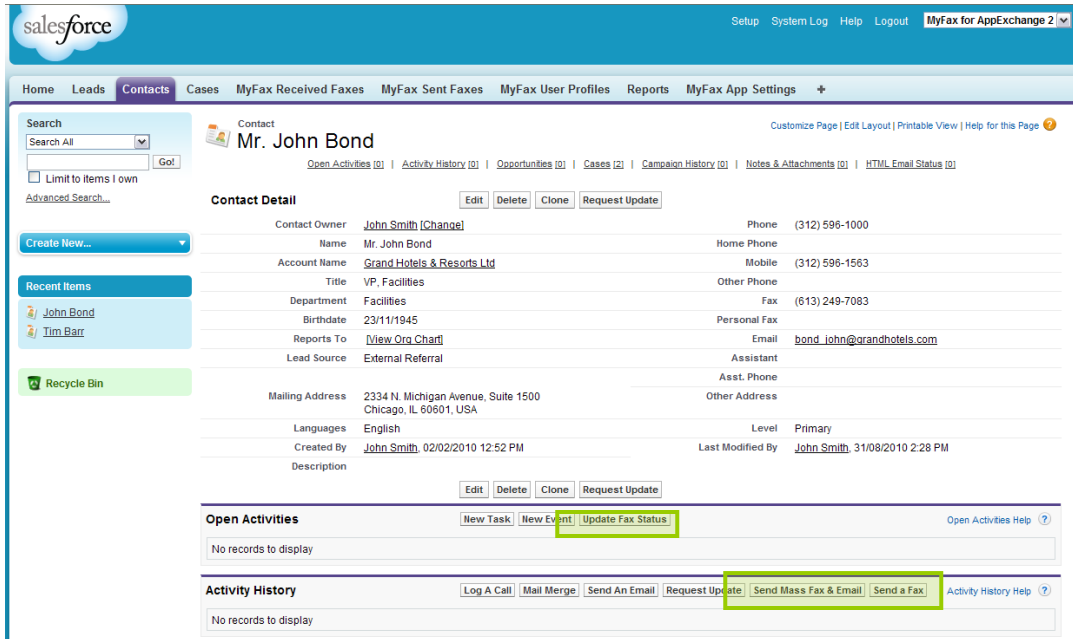


The steps in this section can also be applied to update the layouts for Leads or Cases, should you wish to access the MyFax services from these App tabs.

## 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](mailto:myfaxforappexchange@myfax.com).

## Sending a Fax

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

Task **Send a Fax** [Help for this Page](#)

**Edit Fax** ! = Required Information

Contact/Lead ID

Related To

Fax Number

Additional To

Subject

Billing Code

**Edit Cover Page & Advanced Options**

Cover Page Name

From

Paper Format

Cover Page Tags ☐ Urgent ☐ Review ☐ Comment ☐ Reply ☐ Info

Note

**Attachments**

No records to display

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.

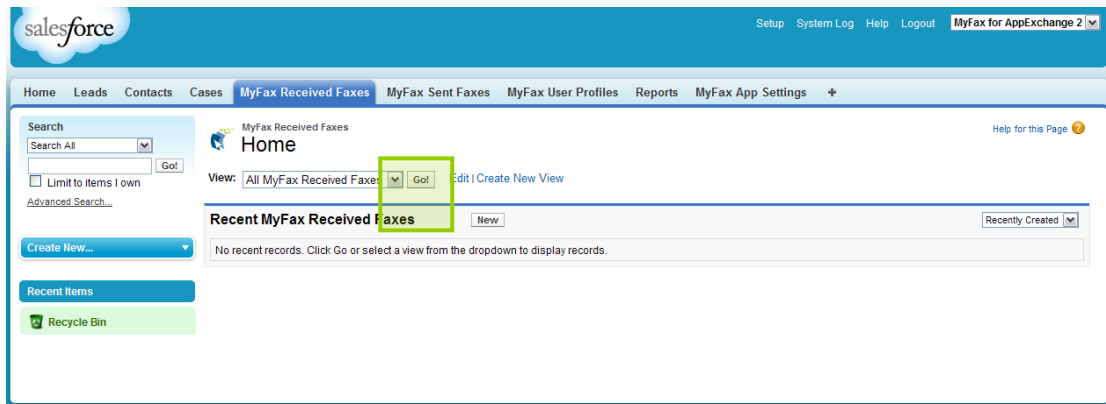
### MyFax Web Services “Check for New Faxes”

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.

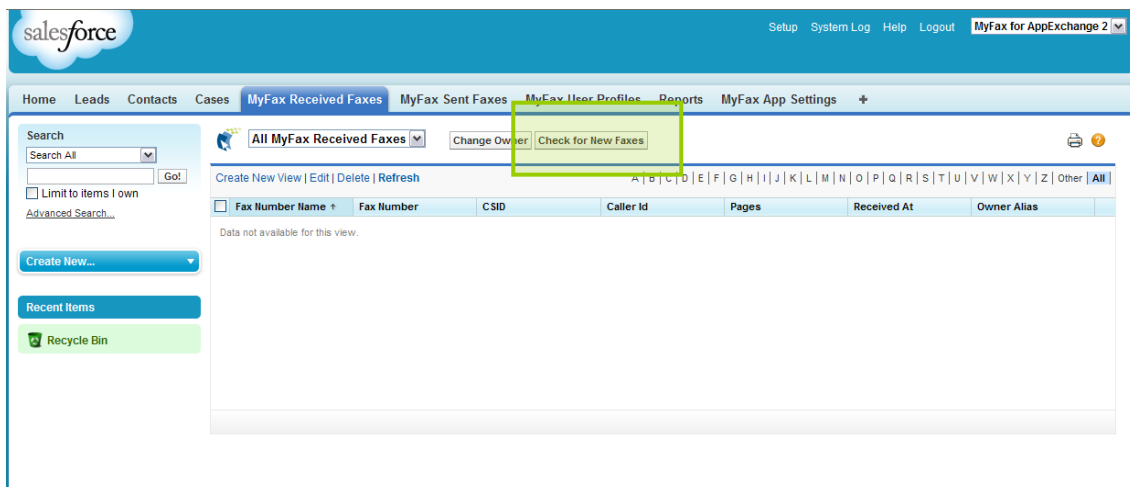
**Note:** To check received faxes via web services it is recommended to first send a fax from Salesforce CRM in order to establish the relationship between your Salesforce CRM and MyFax account.

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

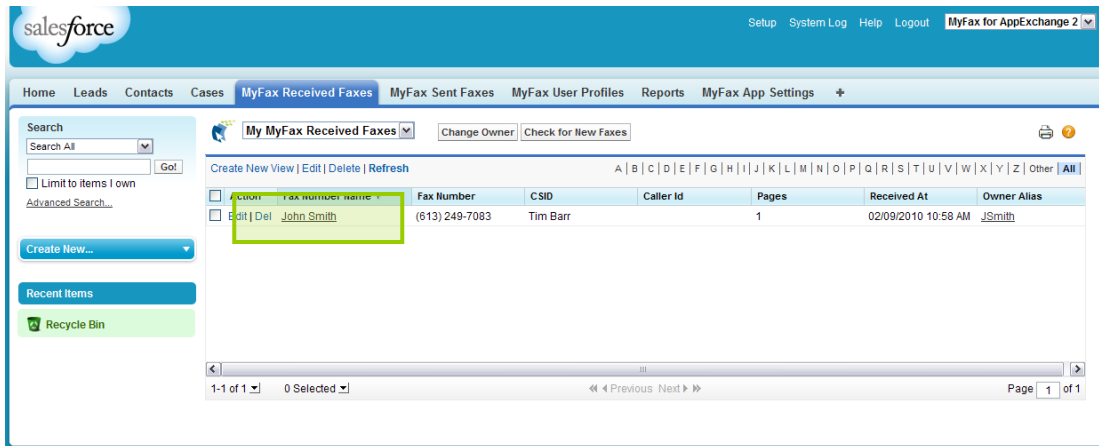
- ▶ Select “MyFax Received Faxes”.
- ▶ Choose “Go” from the MyFax Received Faxes home screen to view all incoming faxes.



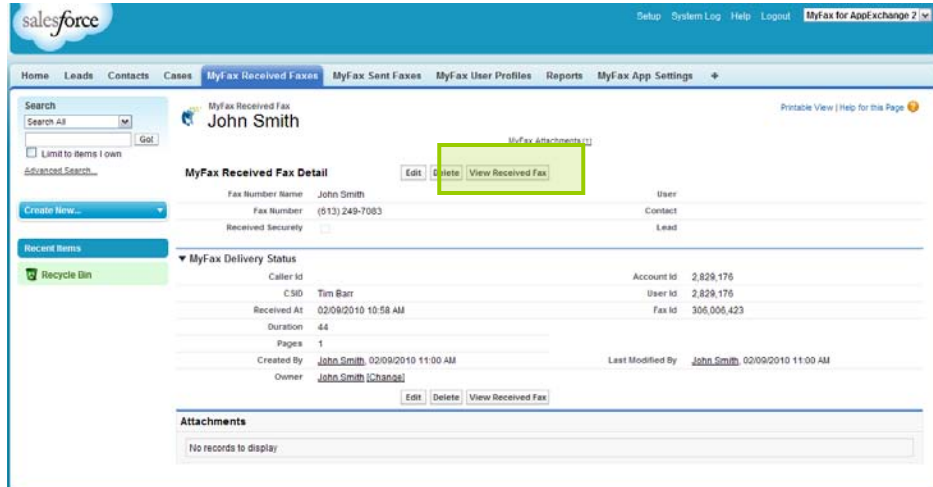
- ▶ Use “Check for New Faxes” to download any new faxes available on your MyFax account.



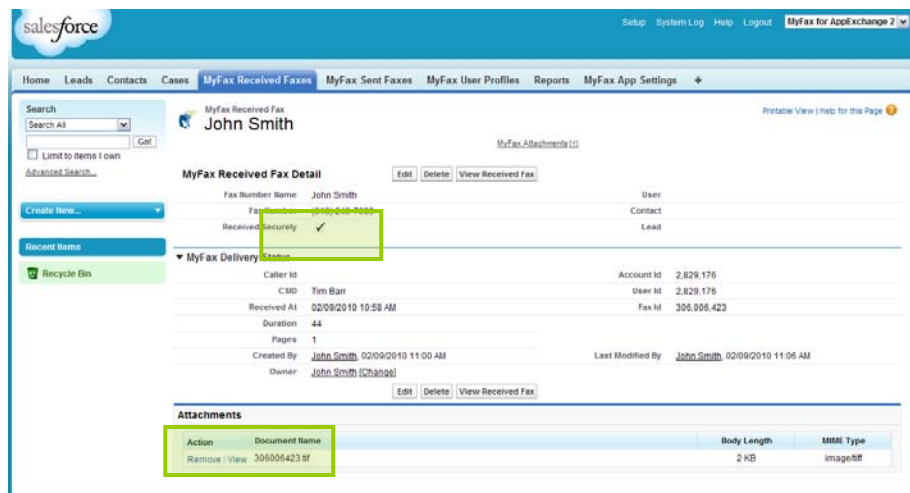
- ▶ Select the “Fax Number Name” of the desired fax to view further details.



- ▶ 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.





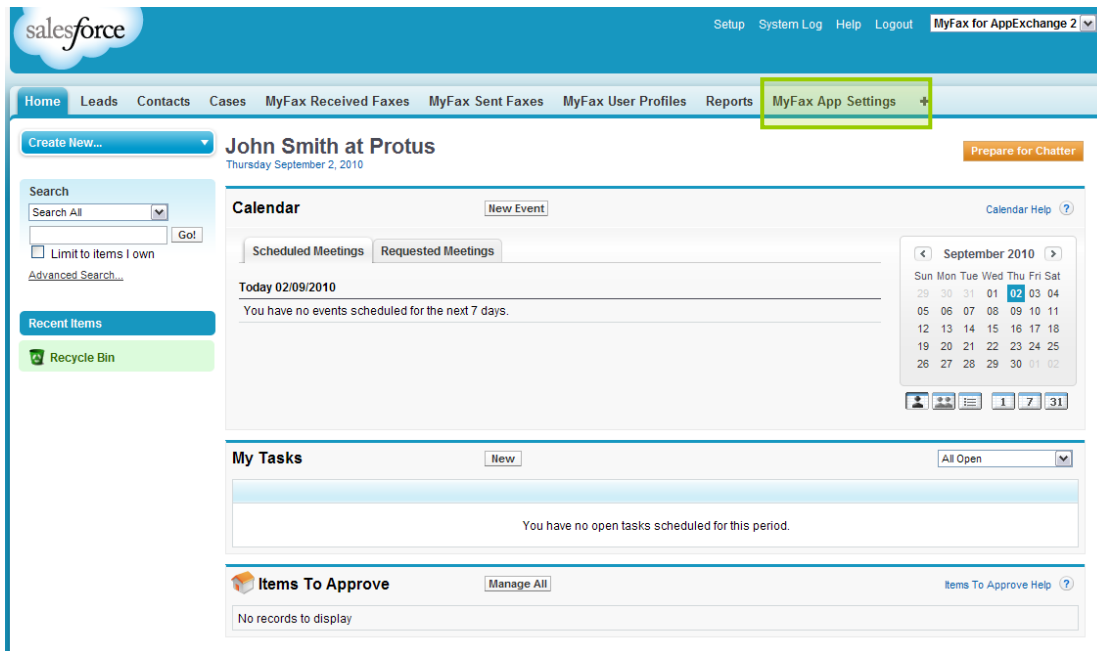
## 7. Enabling Merge Fields and App Settings

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.

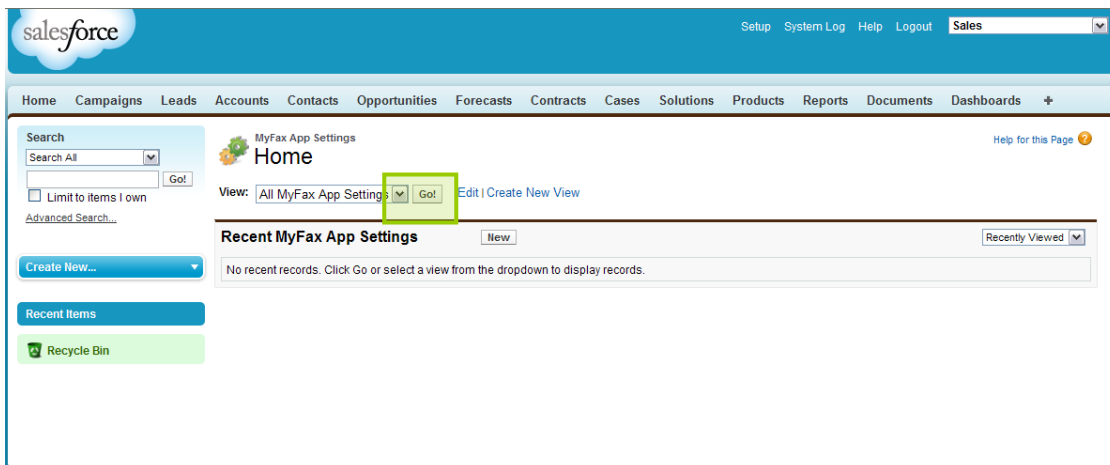
### App Setting Fields

To active the MyFax App settings perform the following:

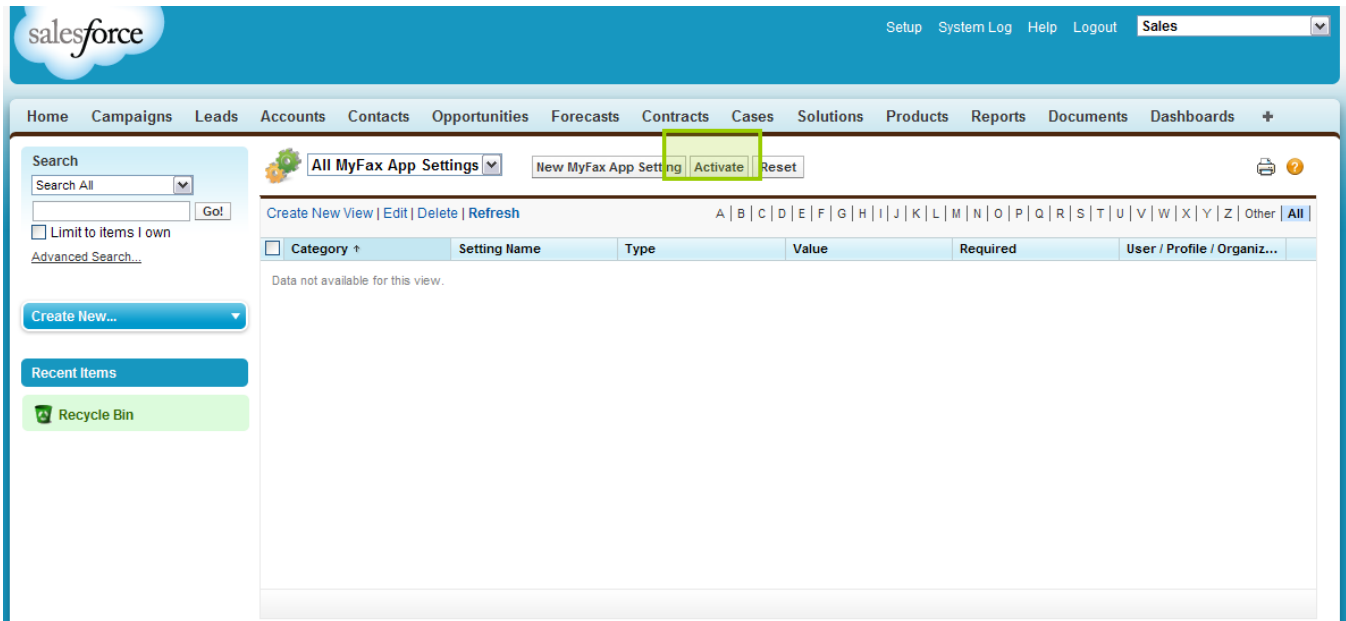
- ▶ Choose “MyFax App Settings”.



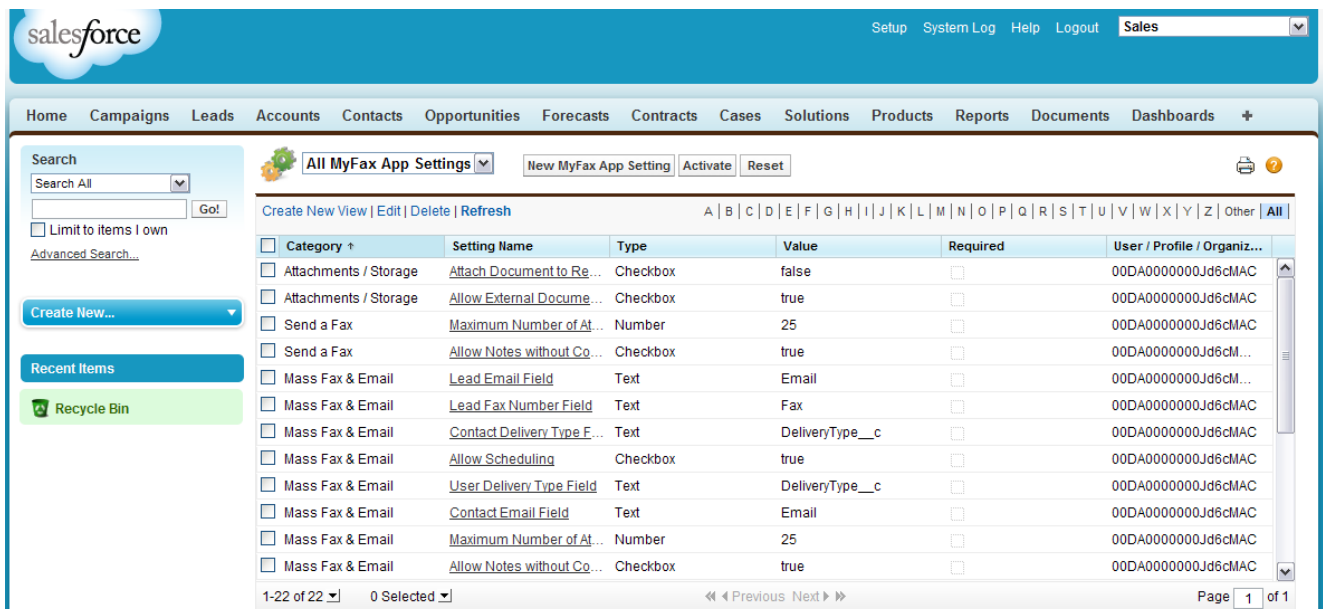
- ▶ Select “Go” to view all the App settings.



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



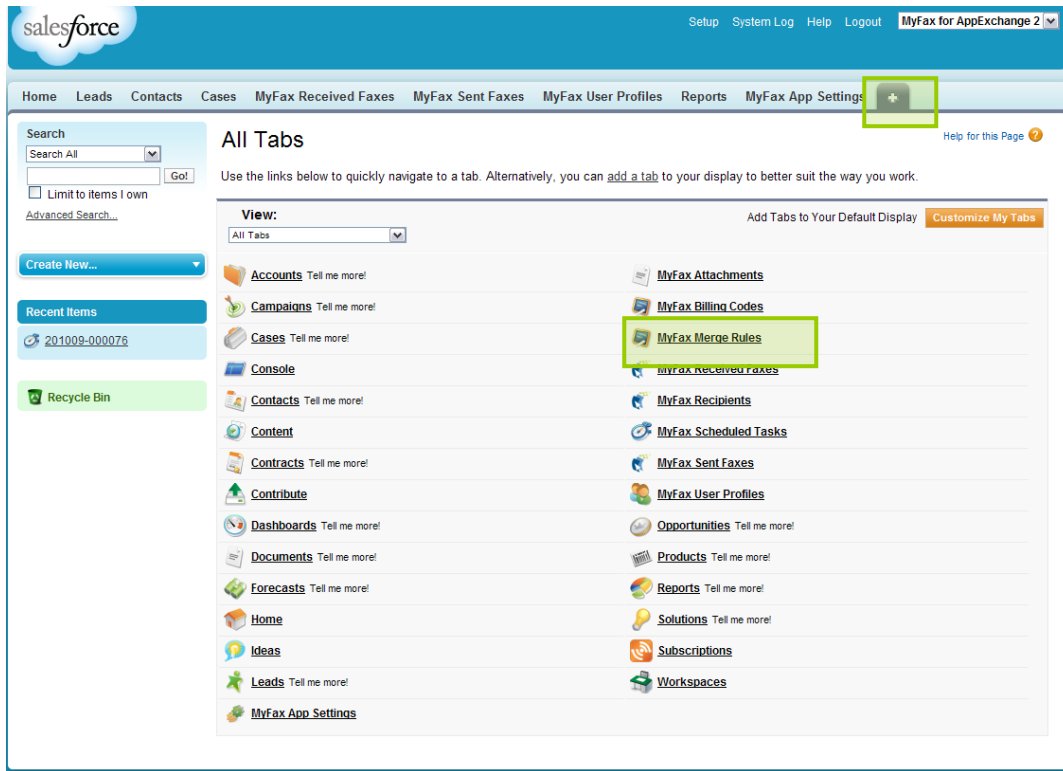
Once activated, the available settings are listed and can be edited or updated by the administrator. Before adjusting these settings, consult with Sales Engineering at **myfaxforappexchange@myfax.com** to discuss the configuration options available to best meet your needs.



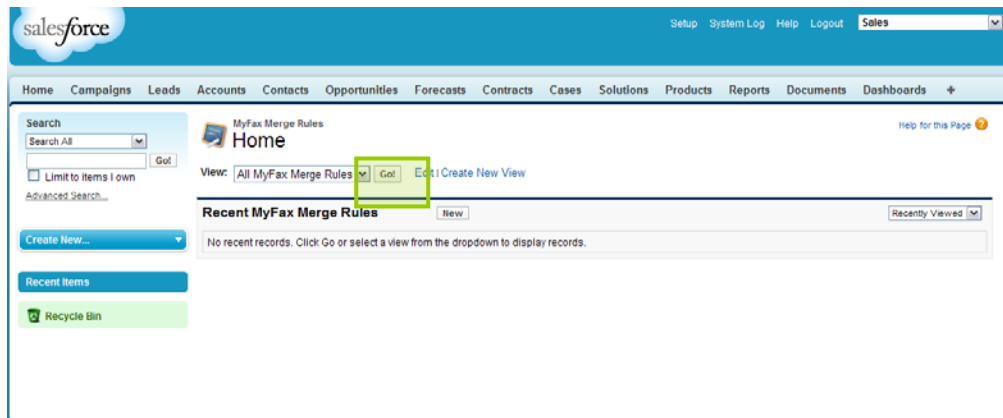
## Merge Fields

To active the MyFax Merge Rule settings perform the following:

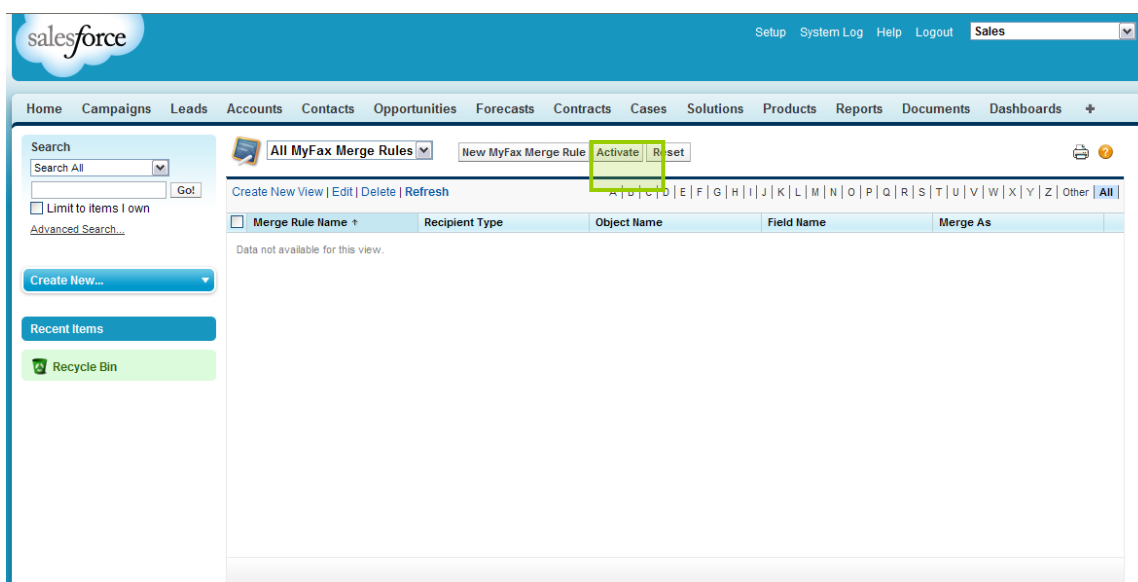
- ▶ Select the “+” to view all the available tabs within your Salesforce CRM Org.
- ▶ Choose “MyFax Merge Rules”.



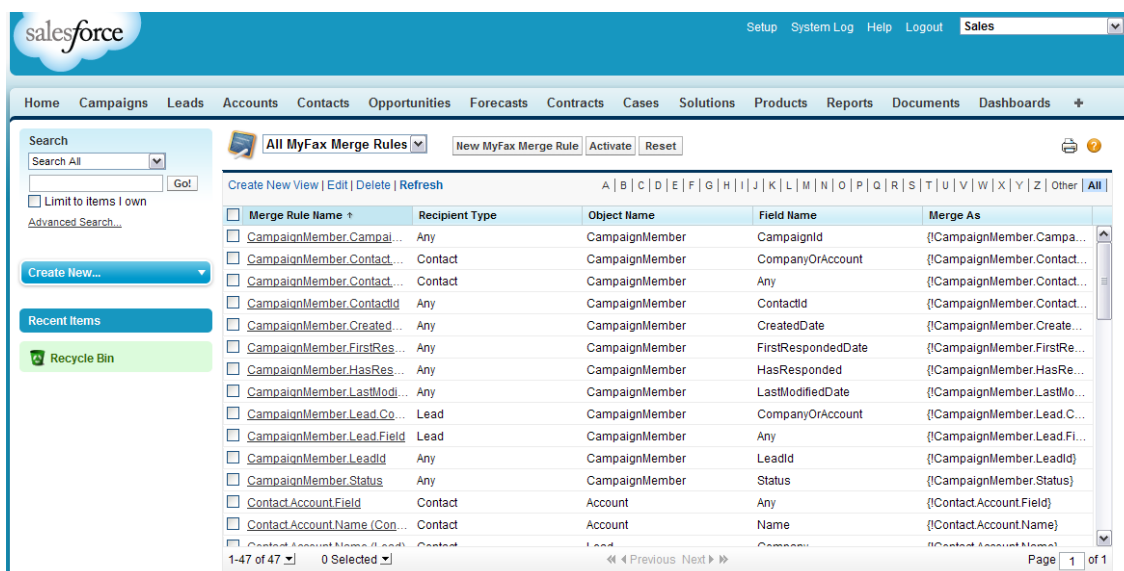
- ▶ Select “Go” to view all the merge settings.



- 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](mailto: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](mailto: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.

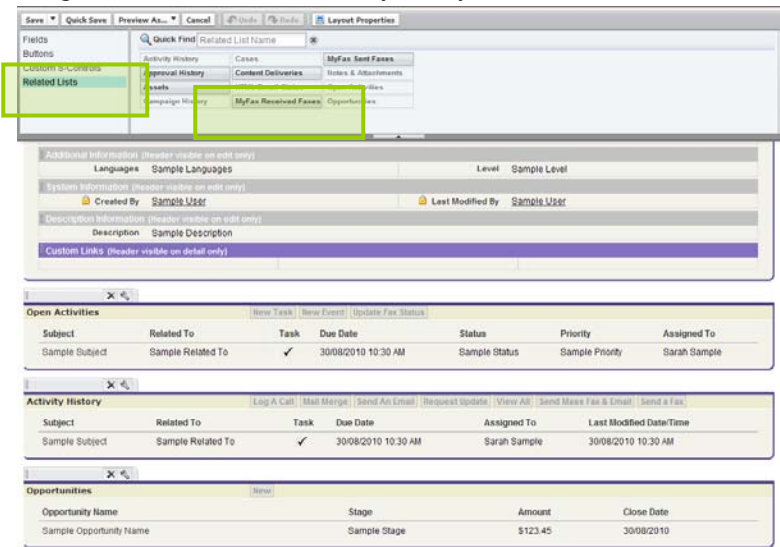
# Appendix A: Enhanced User Experience

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.

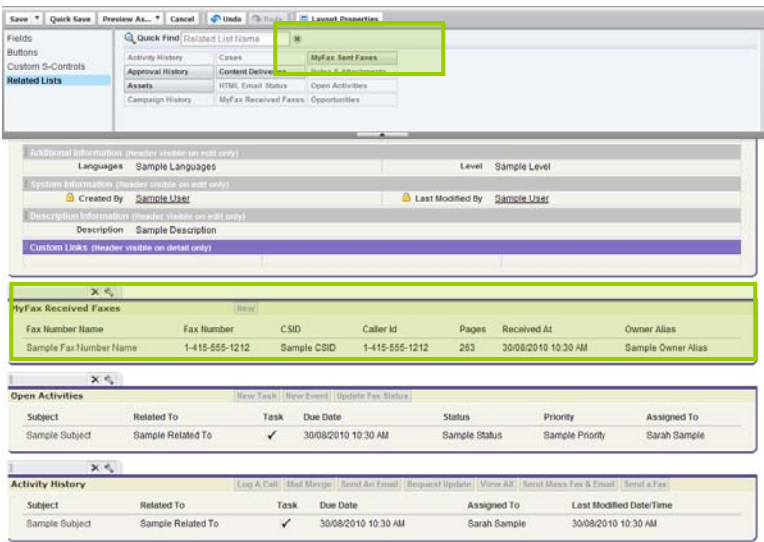
## Add MyFax Related Lists for Viewing Faxes Related to Contacts

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.

The screenshot shows the CRM interface with the 'Related Lists' section. The 'MyFax Sent Faxes' list is highlighted with a green box. The 'MyFax Received Faxes' list is also visible.

Fax Number Name	Fax Number	CSID	Caller Id	Pages	Received At	Owner Alias
Sample Fax Number Name	1-415-555-1212	Sample CSID	1-415-555-1212	263	30/08/2010 10:30 AM	Sample Owner Alias

Recipient Name	Fax Number	Subject	Billing Code	Delivered At	Result	Created By
Sample Recipient Name	1-415-555-1212	Sample Subject	Sample Billing Code	30/08/2010 10:30 AM	Sample Result	Sarah Sample

Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Subject	Sample Related To	✓	30/08/2010 10:30 AM	Sample Status	Sample Priority	Sarah Sample

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.

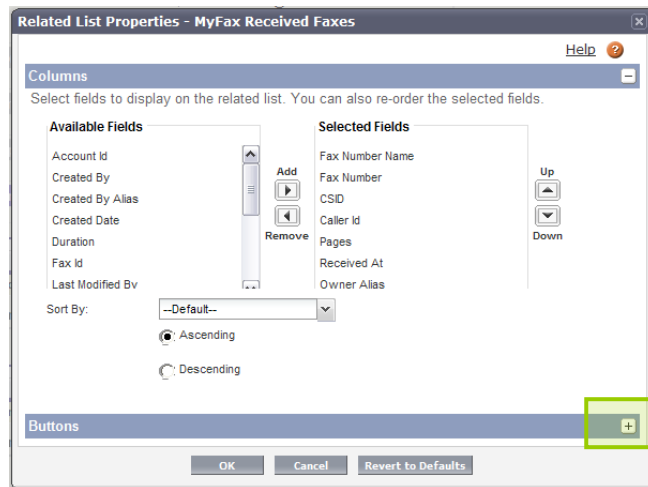
The screenshot shows the CRM interface with the 'Related Lists' section. The 'MyFax Received Faxes' list is highlighted with a green box, and the 'New' button is also highlighted with a green box.

Fax Number Name	Fax Number	CSID	Caller Id	Pages	Received At	Owner Alias
Sample Fax Number Name	1-415-555-1212	Sample CSID	1-415-555-1212	263	30/08/2010 10:30 AM	Sample Owner Alias

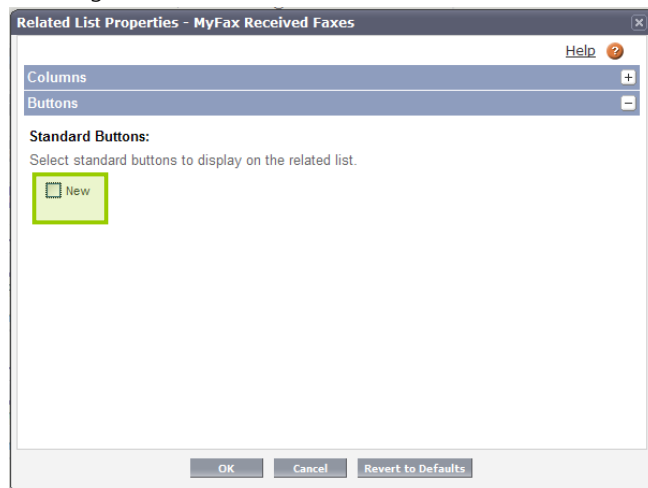
Recipient Name	Fax Number	Subject	Billing Code	Delivered At	Result	Created By
Sample Recipient Name	1-415-555-1212	Sample Subject	Sample Billing Code	30/08/2010 10:30 AM	Sample Result	Sarah Sample

Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Subject	Sample Related To	✓	30/08/2010 10:30 AM	Sample Status	Sample Priority	Sarah Sample

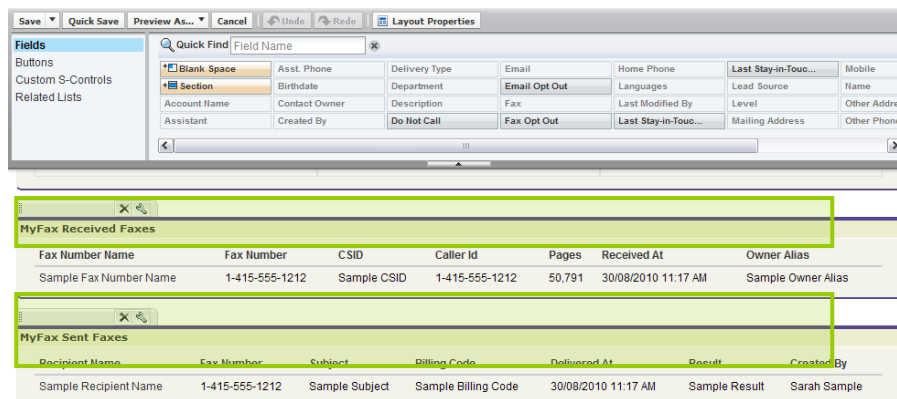
- ▶ Select the “+” sign to view the buttons associated with the list.



- ▶ 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”.

The screenshot shows the Salesforce 'Contact Layout' editor. On the left, the 'Fields' list includes 'Blank Space', 'Section', 'Account Name', 'Assistant', 'Created By', 'Do Not Call', 'Fax Opt Out', 'Last Stay-in-Touch...', 'Mailing Address', and 'Other Phone'. The 'Delivery Type' field is highlighted in green in the 'Fields' list. The 'Contact Sample' section shows a 'Contact Detail' form with various fields like 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Phone', 'Home Phone', 'Mobile', 'Other Phone', 'Fax', 'Personal Fax', 'Email', 'Assistant', 'Asst. Phone', 'Mailing Address', and 'Other Address'. The 'Delivery Type' field is being added to the layout.

- ▶ 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 screenshot shows the 'Contact Layout' editor with the 'Save' button highlighted in green. The 'Contact Sample' section shows the 'Contact Detail' form with the 'Delivery Type' field added to the layout. The 'Delivery Type' field is highlighted in green in the 'Contact Detail' form. The 'Address Information' section is also highlighted in green.

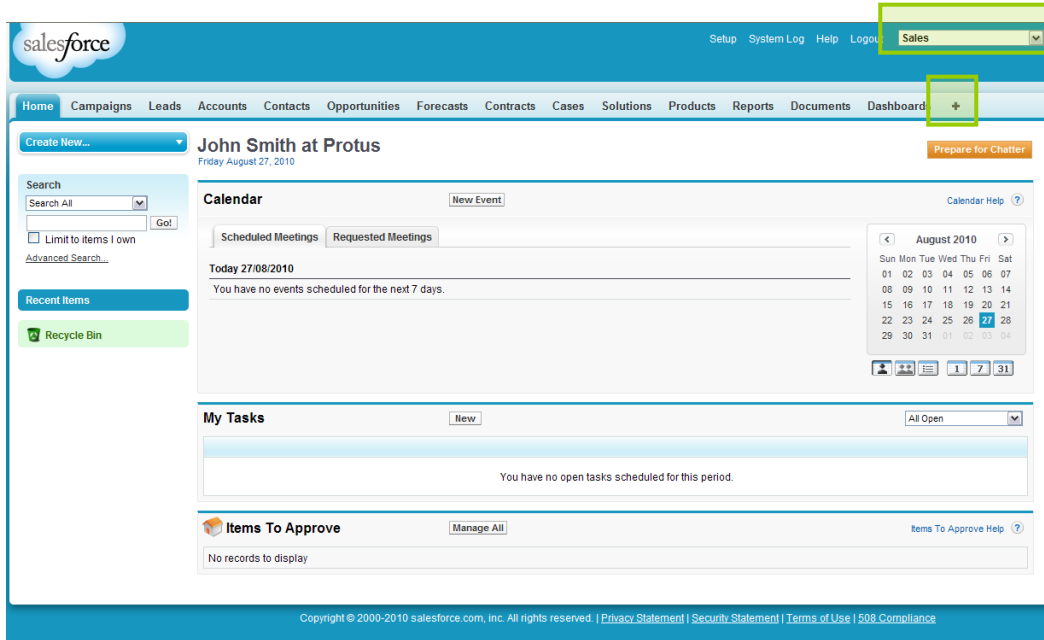
The steps in this section can also be applied to update the layouts for Leads or Cases should you wish to tightly integrate fax services into these Apps.



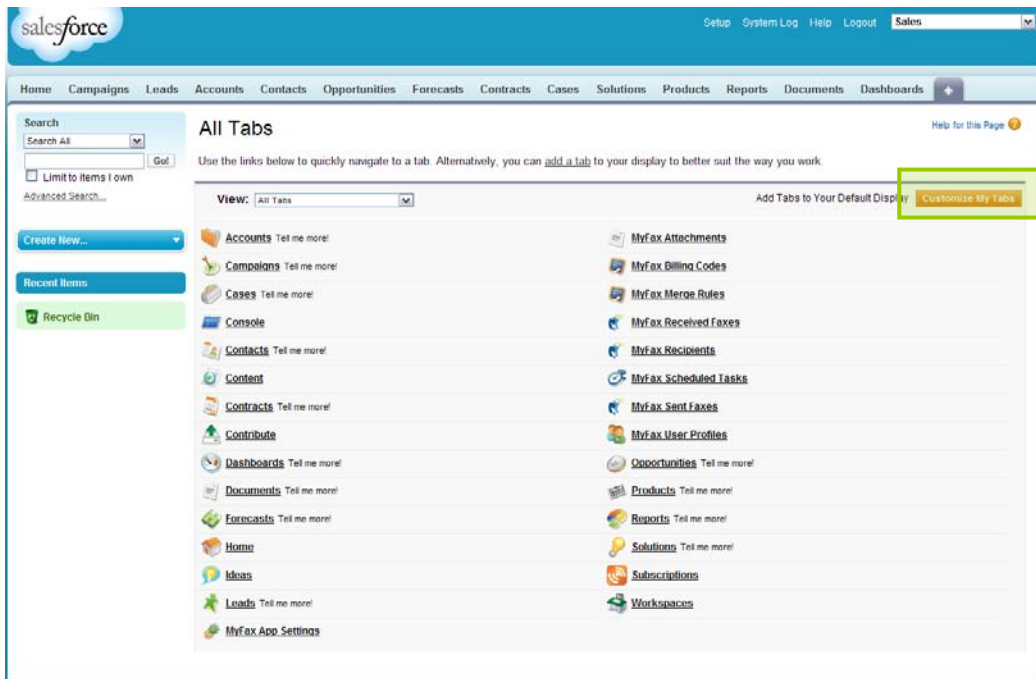
## Showing the MyFax Received Faxes Tab

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.



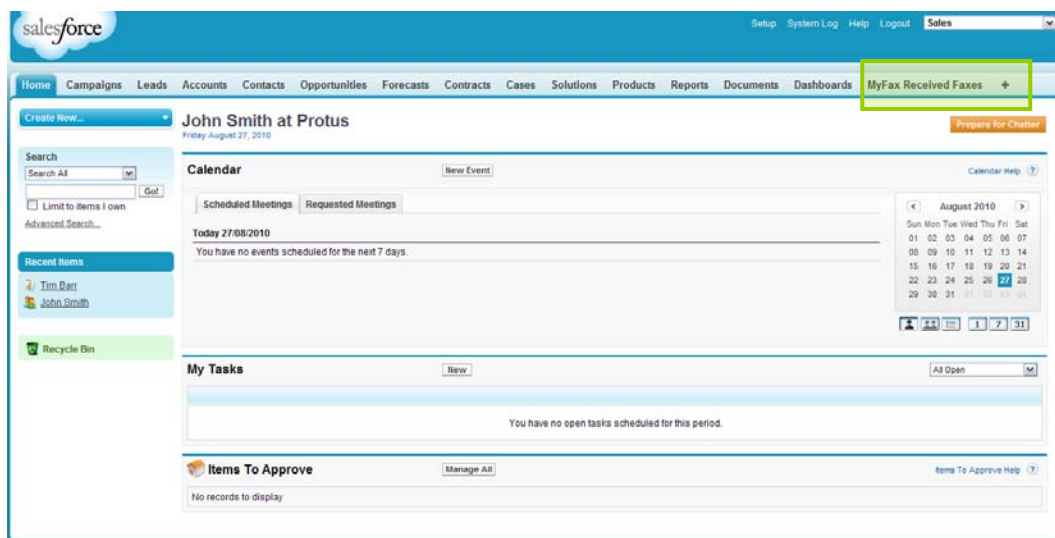
- ▶ Select “Customize My Tabs”.



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

- Once the tab has been added and you 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.

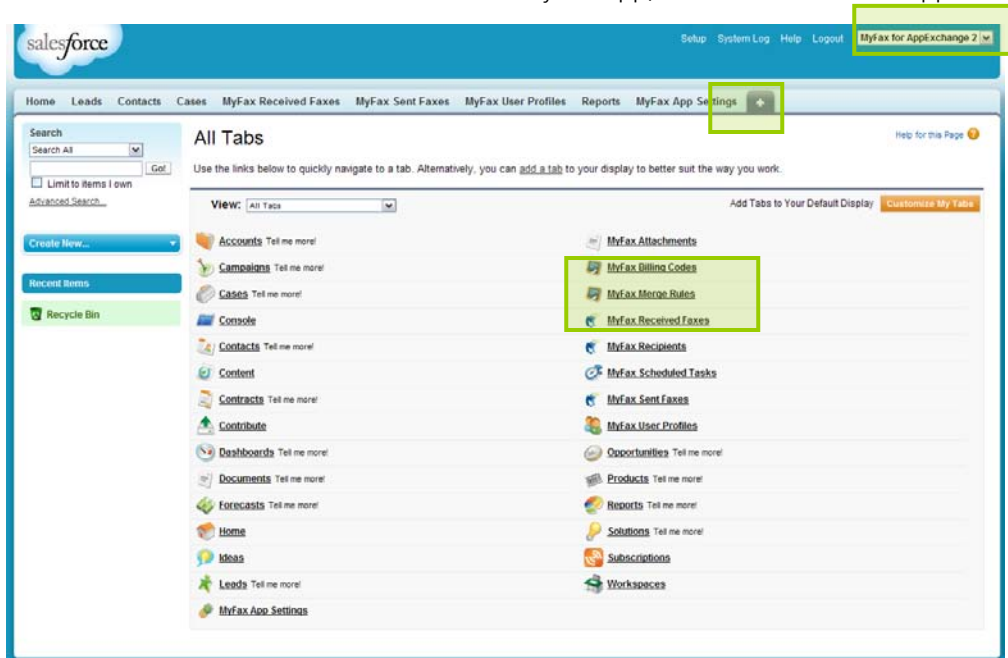
## Dynamic Billing Codes

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.

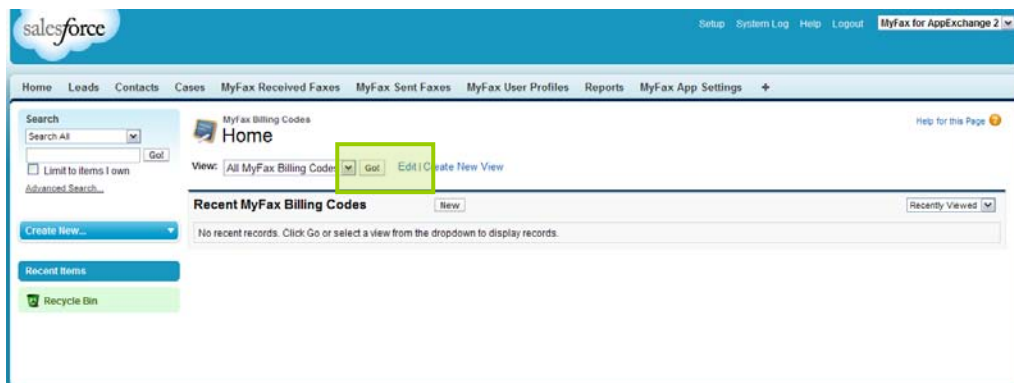
Dynamic Billing Codes allow for the billing code field in the “Send a Fax” or “Send Mass Fax & Email” layouts to be automatically populated with a dynamically merged billing code field based on Salesforce CRM specific information related to the contact who the fax is being sent to. This billing code 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 your organization ID, perform the following:

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

**Company Information**  
Protus

The organization's profile is below.

[User Licenses \(0\)](#) | [Feature Licenses \(0\)](#)

Organization Detail	
Organization Name	Phone
Primary Contact	Fax
Division	Default Locale
Address	Default Language
ON K1J0A6 CA	English (Canada)
Fiscal Year Starts In	Default Time Zone
January	(GMT-05:00) Eastern Daylight Time (America/New_York)
Newsletter	Currency Locale
Admin Newsletter	English (United States)
Hide Notices About System Maintenance	Used Data Space
	367 KB (2%) <a href="#">View</a>
Hide Notices About System Downtime	Used File Space
	3.5 MB (17%) <a href="#">View</a>
	API Requests, Last 24 Hours
	4 (5,000 max)
	Restricted Logins, Current Month
	0 (0 max)
Created By	Salesforce.com Organization ID
John Smith, 02/02/2010 12:52 PM	00DA0000000Jd5c
	Modified By
	John Smith, 30/03/2010 11:48 AM

[Edit](#)

User Licenses					
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce Platform	Active	3	0	3	
Partner	Active	5	0	5	
Customer Portal Manager	Active	10	0	10	
Authenticated Website	Active	10	0	10	
High Volume Customer Portal	Active	10	0	10	
Salesforce	Active	2	2	0	

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

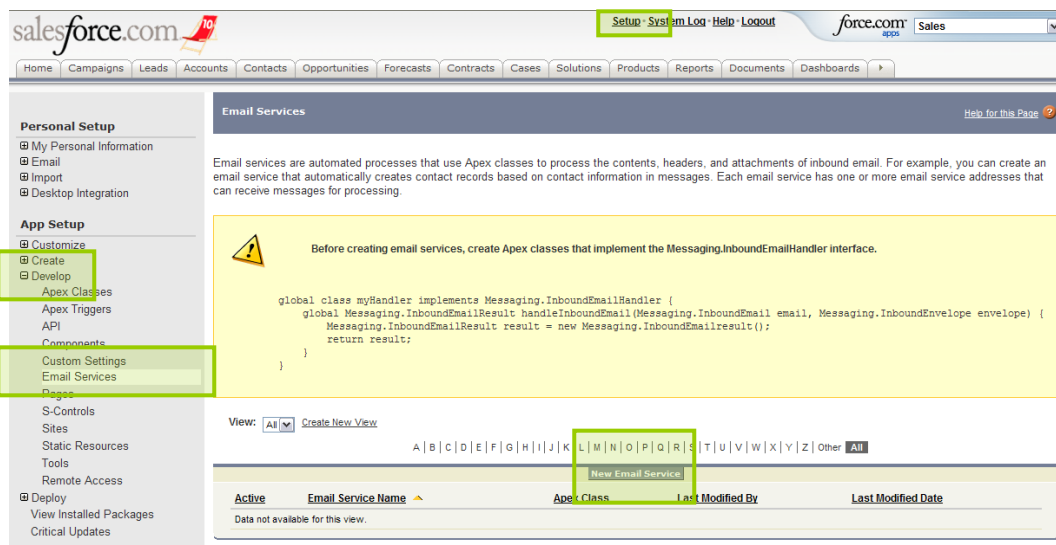
- ▶ **Billing Code Name:** A name of your choice to identify the billing code you are creating
- ▶ **Recipient Type:** The recipient type as the basis for this billing code
- ▶ **Related To:** Where to pull additional merge information from
- ▶ **Merge As:** The standard Salesforce CRM merge rules to 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”.

Home Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions Products Reports Documents Dashboards

**Personal Setup**

- My Personal Information
- Email
  - My Email Settings
  - My Templates
  - My Stay-in-Touch Settings
- Import
- Desktop Integration

**App Setup**

- Customize
- Create
- Develop
  - Apex Classes
  - Apex Triggers
  - API
  - Components
  - Custom Settings
  - Email Services
  - Pages
  - S-Controls
  - Sites
  - Static Resources
  - Tools
  - Remote Access
- Deploy
  - View Installed Packages
  - Critical Updates

**Email Service** [Help for this Page](#)

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings below to create an email service. After saving, create one or more email service addresses to receive messages for processing.

Save Save and New Email Address Cancel

**Email Service Information** ⓘ = Required Information

Email Service Name JohnSmith

Apex Class InboundFaxEmailHandler

Accept Attachments All

Advanced Email Security Settings

Accept Email From

Truncate Oversize Email (Text and HTML)

Convert Text Attachments to Binary Attachments

Active

**Failure Response Settings**

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action Discard message

Deactivated Email Address Action Discard message

Deactivated Email Service Action Discard message

Unauthenticated Sender Action Discard message

Unauthorized Sender Action Discard message

Enable Error Routing

Route Error Emails to This Email Address

Save Save and New Email Address Cancel

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".

**Email Service: JohnSmith** [Help for this Page](#)

Edit Deactivate Delete Cancel

Email Service Name JohnSmith

Apex Class InboundFaxEmailHandler

Accept Attachments All

Advanced Email Security Settings

Accept Email From All email addresses (subject to security settings)

Truncate Oversize Email (Text and HTML)

Convert Text Attachments to Binary Attachments

Active

**Failure Response Settings**

Over Email Rate Limit Action Discard message

Deactivated Email Address Action Discard message

Deactivated Email Service Action Discard message

Unauthenticated Sender Action Discard message

Unauthorized Sender Action Discard message

Enable Error Routing

**Email Addresses** New Email Address

Action	Email Address	Context User
--------	---------------	--------------

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”.

Email Service Address [Help for this Page](#)

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

**Email Service Information**

Email Service Name	JohnSmith
Accept Email From	All email addresses (subject to security settings)

**Email Address Information** ! = Required Information

Email address   
Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active ☒

Context User

Accept Email From

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.

Email Service: JohnSmith [Help for this Page](#)

Email Service Name JohnSmith

Apex Class [InboundFaxEmailHandler](#)

Accept Attachments All

Advanced Email Security Settings ☐

Accept Email From All email addresses (subject to security settings)

Truncate Oversize Email (Text and HTML) ☐

Convert Text Attachments to Binary Attachments ☐

Active ☒

**Failure Response Settings**

Over Email Rate Limit Action	Discard message
Deactivated Email Address Action	Discard message
Deactivated Email Service Action	Discard message
Unauthenticated Sender Action	Discard message
Unauthorized Sender Action	Discard message
Enable Error Routing	<input type="checkbox"/>

**Email Address**

Action	Email Address	Context User
<a href="#">View/Edit</a>	johnsmith@6ifo7vqh86035viahboqm5sz.in.salesforce.com	John Smith



## 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".

The screenshot shows the MyFaxCentral login page. At the top, there are navigation links: >> ABOUT, >> CONTACT, >> SUPPORT, >> LOGIN. The MyFaxCentral logo is prominently displayed. Below the logo, there are links for >> MYFAX and RETURN TO SITE. On the left side, there are links for MyFax Support and MyFax Service Status. The main content area is titled "Login to MyFax" and includes a "Welcome!" message. There are input fields for "Login ID:" and "Password:". Below these fields are checkboxes for "Remember my Login ID" and "Remember my Login ID and Password". A "Login" button is located to the right of the password field. Below the login fields, there are links for "Problems logging in?", "Forgot your Password?", and "Don't have a MyFax number yet? Sign up online!". On the right side, there is a list of links: "Login anytime, anywhere", "Send, receive, view and store your faxes online", "Update your account and billing information", "Edit your preferences", and "View real-time statistics". At the bottom, there is a copyright notice for 2006 Protus IP Solutions Inc. and links for Privacy Policy, Terms and Conditions, Sitemap, and Join Affiliate Program.

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

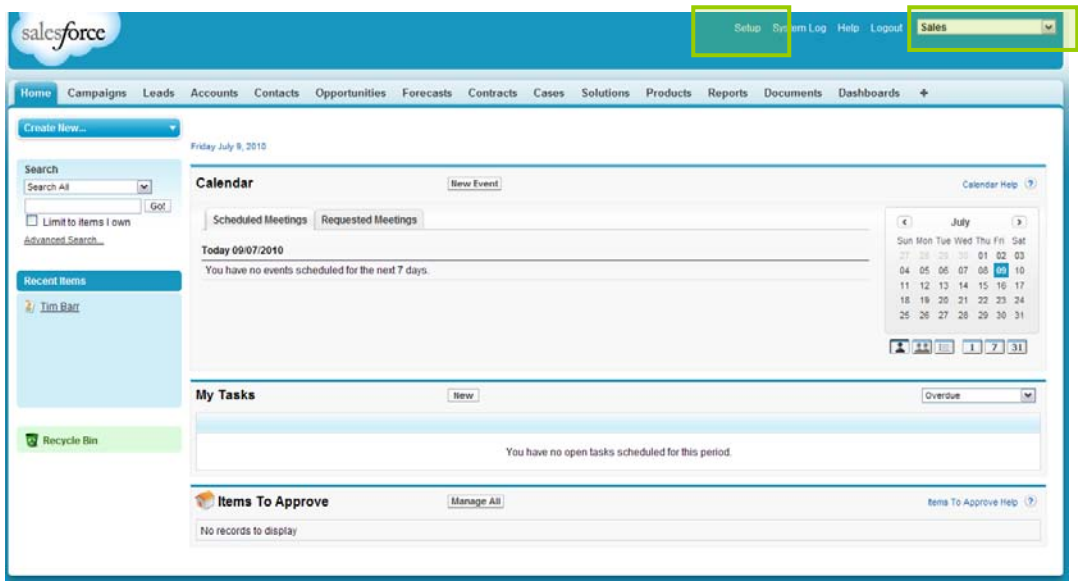
The screenshot shows the MyFaxCentral "Receive Preferences" page. The page has a sidebar on the left with links for Home, Send a Fax, Inbox, Sent Faxes, Outbox, Contact Books, My Account (Billing Profile, Account Invoice, Payment History, Account Activity Report, User Administration), My Preferences (Setup Wizard, User Profile, Send Preferences, Receive Preferences), and Receive Preferences. The main content area is titled "Receive Preferences" and includes a green message "Email Address Added." Below this, there is a section for "Fax Delivery Email Addresses" with a list of email addresses: "jsmith@example.com" and "johnsmith@6jfo7vqh86035vjahboqm5sz.in.salesf". A "Remove" button is next to the second email address. Below the list, there is a message "You must list at least one email address" and a form to "Add new email address to list:" with an "Add" button. The next section is "Fax Delivery and Notification Options" with radio buttons for "Receive faxes as:" (PDF, TIFF), "Deliver by email:" (Fax, Notification Only, Neither), "Display first page of fax in email body:" (Yes, No), and "Send Fax Received notifications by SMS:" (Yes, No). The final section is "Online Fax Storage" with a message "You can store faxes online for up to 366 days" and a form to "Store faxes for:" with a "366 Days\*" button. A footnote at the bottom states: "\* Storage period applies to all fax numbers in your account."

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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MyFaxForAppExchange2</a>	<a href="#">myfax3</a>	<a href="#">https://ws.myfax.com</a>	<input checked="" type="checkbox"/>	<a href="#">Smith, John</a>	01/09/2010 8:29 AM	<a href="#">Smith, John</a>	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”.

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration

**App Setup**

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls**
  - Sharing Settings
  - Field Accessibility
  - Password Policies
  - Session Settings
  - Network Access
  - Single Sign-On Settings
  - View Setup Audit Trail
  - Expire All Passwords
  - Delegated Administration
  - Remote Site Settings**
  - HTML Documents and Attachments Settings
- Communication Templates
- Data Management
- Monitoring
- Mobile Administration

**All Remote Sites** [Help for this Page](#)

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: **All Remote Sites** [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

**New Remote Site**

Action	Remote Site Name	Remote Site URL	Created By	Created Date	Last Modified By	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	ApexDevNet	http://www.apexdevnet.com	Carlson, Chad	02/02/2010 12:52 PM	Carlson, Chad	02/02/2010 12:52 PM

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

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”.

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration

**App Setup**

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

**Administration Setup**

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

**Remote Site Edit** [Help for this Page](#)

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

**Remote Site Edit** [Save](#) [Save & New](#) [Cancel](#)

Remote Site Name: **MyFax**

Remote Site URL: **https://ws.myfax.com**

Disable Protocol Security: ☒

Description:

[Save](#) [Save & New](#) [Cancel](#)

## 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”.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	MyFax App Setting	MyFax for AppExchange 2		✓	
Edit	MyFax Attachment	MyFax for AppExchange 2		✓	
Edit	MyFax Billing Code	MyFax for AppExchange 2		✓	
Edit	MyFax Merge Rule	MyFax for AppExchange 2		✓	
Edit	MyFax Received Fax	MyFax for AppExchange 2		✓	
Edit	MyFax Recipient	MyFax for AppExchange 2	MyFax Sent Fax	✓	
Edit	MyFax Scheduled Task	MyFax for AppExchange 2		✓	
Edit	MyFax Sent Fax	MyFax for AppExchange 2		✓	
Edit	MyFax User Profile	MyFax for AppExchange 2		✓	

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.

The Object Name is used when referencing the object via the API.  
Object Name: OutboundFax Example: Account

Description: [Text Area]

Context-Sensitive Help Setting:  
☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a custom s-control  
☐ Open a window using a Visualforce page

Content Name: --None--

**Enter Record Name Label and Format**  
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is “Account Name” and for Case it is “Case Number”. Note that the Record Name field is always called “Name” when referenced via the API.  
Record Name: Outbound Fax Name Example: Account Name

Data Type: Text

**Optional Features**  
☒ Allow Reports  
☒ Allow Activities  
☐ Track Field History

**Deployment Status**  
☐ In Development  
☒ Deployed

Buttons: Save, Save & New, Cancel

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.

**Personal Setup**

- My Personal Information
- Email
  - My Email Settings
  - My Templates
  - My Stay-in-Touch Settings
- Import
- Desktop Integration

**App Setup**

- Customize
- Create
- Develop
  - Deploy
  - View Installed Packages
  - Critical Updates

**Administration Setup**

- Manage Users
  - Users
  - Roles**
  - Profiles**
  - Public Groups
  - Queues
  - Login History
- Company Profile
- Security Controls

**User Profiles** [Help for this Page](#)

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom: Marketing Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom: Sales Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom: Support Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Customer Portal Manager</a>	Customer Portal Manager	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">High Volume Customer Portal</a>	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Marketing User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Partner User</a>	Partner	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Read Only</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Custom Administrator</a>	Salesforce	<input type="checkbox"/>

Select Clone.

**Profile Detail** [Help for this Page](#)

[Back to List: Custom Object Definitions](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[8\]](#)

[Edit](#) [Clone](#) [View Users](#)

Name	Standard User
User License	Salesforce
Created By	<a href="#">Chad Carlson</a> , 02/02/2010 12:52 PM
Modified By	<a href="#">Chad Carlson</a> , 02/03/2010 2:14 PM

**Console Settings**

Console Layout [\[ Edit \]](#)

**Page Layouts**

**Standard Object Layouts**

Object	Layout
Home Page Layout	DE Default <a href="#">[ View Assignment ]</a>
Account	Account Layout <a href="#">[ View Assignment ]</a>
Asset	Asset Layout <a href="#">[ View Assignment ]</a>
Campaign	Campaign Layout <a href="#">[ View Assignment ]</a>
Campaign Member	Campaign Member Page Layout <a href="#">[ View Assignment ]</a>
Event	Event Layout <a href="#">[ View Assignment ]</a>
Lead	Lead Layout <a href="#">[ View Assignment ]</a>
Opportunity	Opportunity Layout <a href="#">[ View Assignment ]</a>
Opportunity Product	Opportunity Product Layout <a href="#">[ View Assignment ]</a>
Product	Product Layout <a href="#">[ View Assignment ]</a>
Solution	Solution Layout <a href="#">[ View Assignment ]</a>

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			Basic Access			
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete
MyFax App Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MyFax Recipients	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MyFax Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MyFax Scheduled Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MyFax Billing Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MyFax Sent Faxes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MyFax Merge Rules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MyFax User Profiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MyFax Received Faxes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

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)”.

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration

**App Setup**

- Customize
- Create
  - Apps
  - Custom Labels
  - Objects
  - Packages
  - Report Types
  - Tabs
- Workflow & Approvals
- Develop
- Deploy
  - View Installed Packages
  - Critical Updates

**Administration Setup**

- Manage Users
  - Users
  - Profiles**
  - Public Groups
  - Queues
  - Login History
  - Company Profile
  - Security Controls

**User Profiles**

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom Marketing Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom Sales Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Custom Support Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Customer Portal Manager</a>	Customer Portal Manager	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">High Volume Customer Portal</a>	High Volume Customer Portal	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Marketing User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Partner User</a>	Partner	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Read Only</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Standard User (MyFax)</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

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

Page Layouts			
Standard Object Layouts			
Home Page Layout	DE Default <a href="#">[ View Assignment ]</a>	Event	<a href="#">Event Layout</a> <a href="#">[ View Assignment ]</a>
Account	<a href="#">Account Layout</a> <a href="#">[ View Assignment ]</a>	Lead	<a href="#">Lead Layout</a> <a href="#">[ View Assignment ]</a>
Asset	<a href="#">Asset Layout</a> <a href="#">[ View Assignment ]</a>	Opportunity	<a href="#">Opportunity Layout</a> <a href="#">[ View Assignment ]</a>
Campaign	<a href="#">Campaign Layout</a> <a href="#">[ View Assignment ]</a>	Opportunity Product	<a href="#">Opportunity Product Layout</a> <a href="#">[ View Assignment ]</a>
Campaign Member	<a href="#">Campaign Member Page Layout</a> <a href="#">[ View Assignment ]</a>	Product	<a href="#">Product Layout</a> <a href="#">[ View Assignment ]</a>
Case	<a href="#">Case Layout</a> <a href="#">[ View Assignment ]</a>	Solution	<a href="#">Solution Layout</a> <a href="#">[ View Assignment ]</a>
Case Close	<a href="#">Close Case Layout</a> <a href="#">[ View Assignment ]</a>	Task	<a href="#">Task Layout</a> <a href="#">[ View Assignment ]</a>
Contact	<a href="#">Contact Layout</a> <a href="#">[ View Assignment ]</a>	User	<a href="#">User Layout</a> <a href="#">[ View Assignment ]</a>
Contract	<a href="#">Contract Layout</a> <a href="#">[ View Assignment ]</a>		
Custom Object Layouts			
MyFax App Setting	<a href="#">MyFax App Setting Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>	MyFax Recipient	<a href="#">MyFax Recipient Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>
MyFax Attachment	<a href="#">MyFax Attachment Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>	MyFax Scheduled Task	<a href="#">MyFax Scheduled Task Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>
MyFax Billing Code	<a href="#">MyFax Billing Code Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>	MyFax Sent Fax	<a href="#">MyFax Sent Fax Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>
MyFax Merge Rule	<a href="#">MyFax Merge Rule Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>	MyFax User Profile	<a href="#">MyFax User Profile Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>
MyFax Received Fax	<a href="#">MyFax Received Fax Layout (Administrator)</a> <a href="#">[ View Assignment ]</a>		

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””.

Page Layout Assignment  
MyFax Sent Fax

[Back to Custom Object: MyFax Sent Fax](#)

Help for this Page

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

Edit Assignment

Profiles	Page Layout
Contract Manager	MyFax Sent Fax Layout (Administrator)
Custom: Marketing Profile	MyFax Sent Fax Layout (Administrator)
Custom: Sales Profile	MyFax Sent Fax Layout (Administrator)
Custom: Support Profile	MyFax Sent Fax Layout (Administrator)
Marketing User	MyFax Sent Fax Layout (Administrator)
Partner User	MyFax Sent Fax Layout (Administrator)
Read Only	MyFax Sent Fax Layout (Administrator)
Solution Manager	MyFax Sent Fax Layout (Administrator)
Standard Platform User	MyFax Sent Fax Layout (Administrator)
Standard User	MyFax Sent Fax Layout (Administrator)
Standard User (MyFax)	MyFax Sent Fax Layout (Administrator)
System Administrator	MyFax Sent Fax Layout (Administrator)

Edit Assignment

Select the MyFax Send Fax (User) layout.

Edit Page Layout Assignment  
MyFax Sent Fax

Help for this Page

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 -- 1 Selected 0 Changed

-- Select Page Layout --

MyFax Sent Fax Layout (Administrator)

MyFax Sent Fax Layout (User)

Profiles	Page Layout
Contract Manager	MyFax Sent Fax Layout (Administrator)
Custom: Marketing Profile	MyFax Sent Fax Layout (Administrator)
Custom: Sales Profile	MyFax Sent Fax Layout (Administrator)
Custom: Support Profile	MyFax Sent Fax Layout (Administrator)
Marketing User	MyFax Sent Fax Layout (Administrator)
Partner User	MyFax Sent Fax Layout (Administrator)
Read Only	MyFax Sent Fax Layout (Administrator)
Solution Manager	MyFax Sent Fax Layout (Administrator)
Standard Platform User	MyFax Sent Fax Layout (Administrator)
Standard User	MyFax Sent Fax Layout (Administrator)
Standard User (MyFax)	MyFax Sent Fax Layout (Administrator)
System Administrator	MyFax Sent Fax Layout (Administrator)

Save Cancel

Save the layout settings.

Edit Page Layout Assignment  
MyFax Sent Fax

Help for this Page

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: MyFax Sent Fax Layout (User) 1 Selected 1 Changed

MyFax Sent Fax Layout (User)

Profiles	Page Layout
Contract Manager	MyFax Sent Fax Layout (Administrator)
Custom: Marketing Profile	MyFax Sent Fax Layout (Administrator)
Custom: Sales Profile	MyFax Sent Fax Layout (Administrator)
Custom: Support Profile	MyFax Sent Fax Layout (Administrator)
Marketing User	MyFax Sent Fax Layout (Administrator)
Partner User	MyFax Sent Fax Layout (Administrator)
Read Only	MyFax Sent Fax Layout (Administrator)
Solution Manager	MyFax Sent Fax Layout (Administrator)
Standard Platform User	MyFax Sent Fax Layout (Administrator)
Standard User	MyFax Sent Fax Layout (Administrator)
Standard User (MyFax)	MyFax Sent Fax Layout (User)
System Administrator	MyFax Sent Fax Layout (Administrator)

Save Cancel

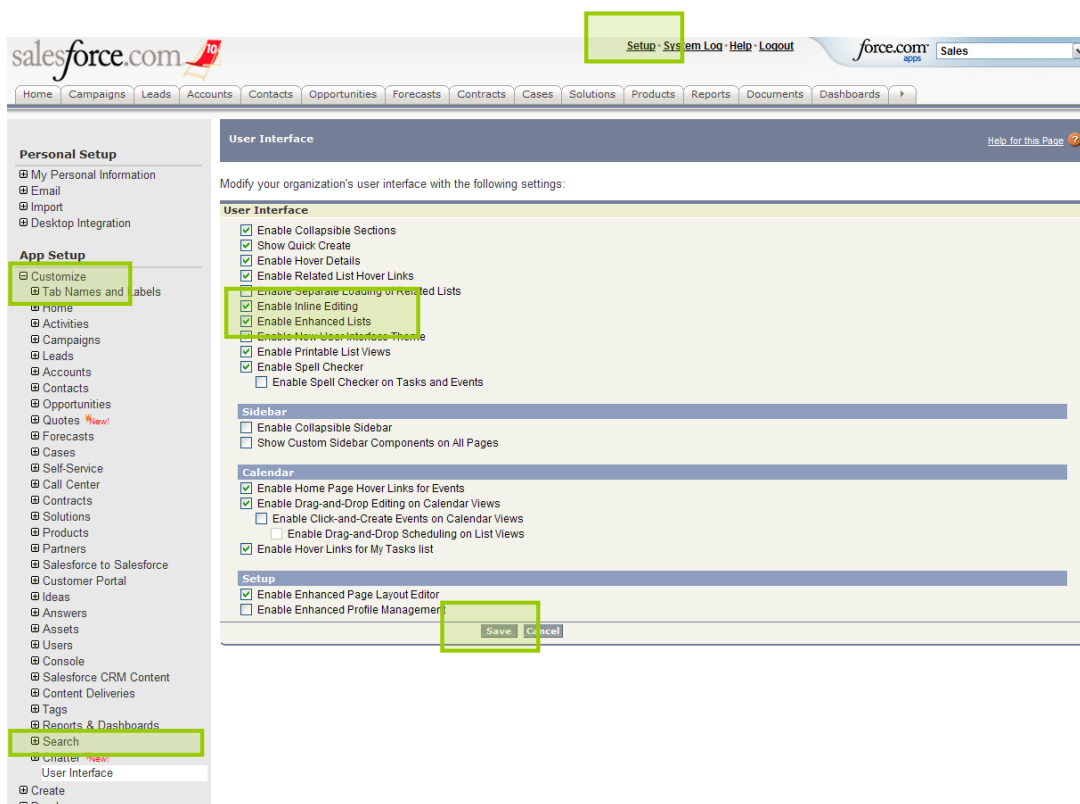
The layouts for additional custom objects; “MyFax Recipient”, “MyFax Received Fax”, etc., can be updated in exactly the same manner as was performed in this example.



## 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:

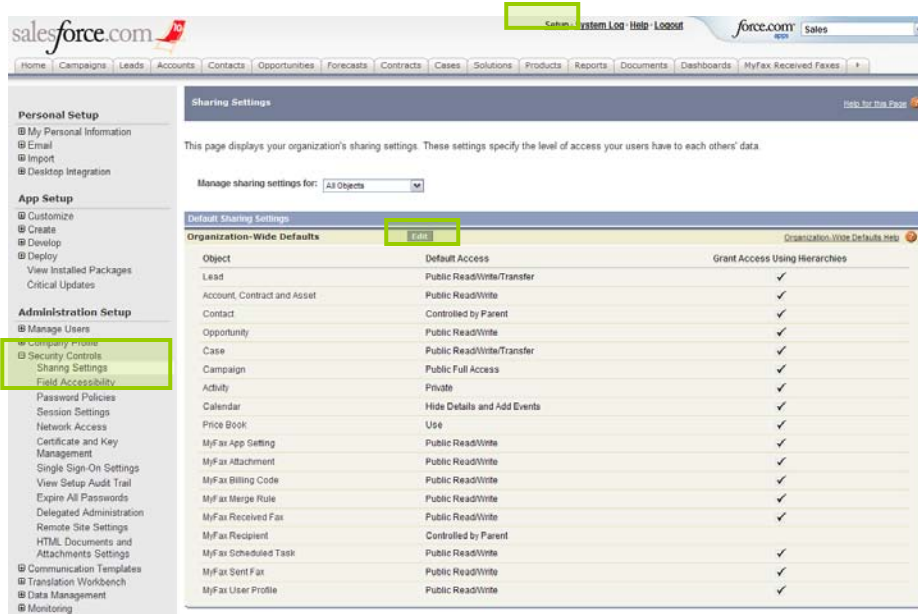
- ▶ Accessible from “Setup”, “Customize”, “User Interface”.
- ▶ Select “Enable Inline Editing”.
- ▶ Select “Enable Enhanced Lists”.
- ▶ “Save” your configuration changes.



## 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.

**Organization-Wide Sharing Defaults Edit** [Help for this Page](#)

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization.

[Save](#) [Cancel](#)

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	✓
Account, Contract and Asset	Public Read/Write	✓
Contact	Controlled by Parent	✓
Opportunity	Public Read/Write	✓
Case	Public Read/Write/Transfer	✓
Campaign	Public Full Access	✓
Activity	Private	✓
Calendar	Hide Details and Add Events	✓
Price Book	Use	✓
MyFax App Setting	Public Read/Write	✓
MyFax Attachment	Public Read/Write	✓
MyFax Billing Code	Public Read/Write	✓
MyFax Merge Rule	Public Read/Write	✓
MyFax Received Fax	Private	✓
MyFax Scheduled Task	Public Read/Write	✓
MyFax Sent Fax	Private	✓
MyFax User Profile	Public Read/Write	✓

[Save](#) [Cancel](#)

## 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) complete 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](mailto: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.