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eFax Connector for Salesforce Upgrade Installation Guide

VERSION: 1.1

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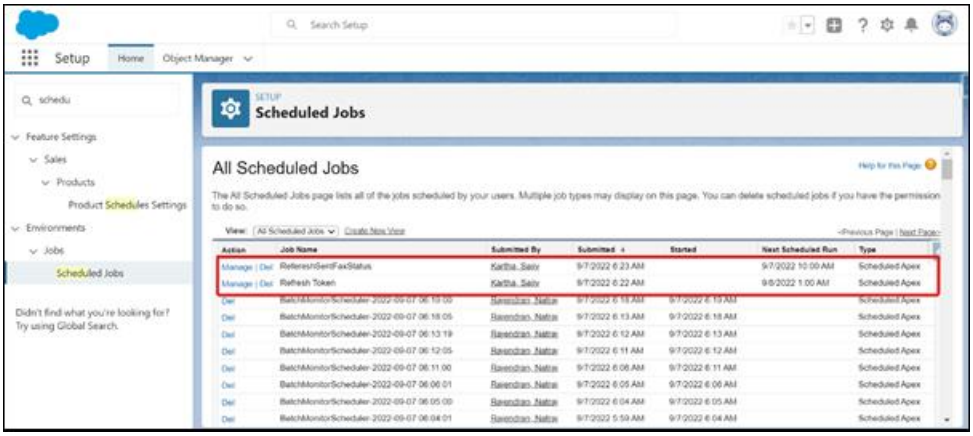
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PRE-INSTALLATION INSTRUCTIONS

When upgrading the application, you should delete the following jobs; the newly introduced batch process will handle the Token Refresh and the Sent Faxes Statuses.

- Delete any apex schedule for refreshing the eFax token (RefreshTokenBatchNew_Scheduler)
- Delete any apex schedule for refreshing the eFax status (RefreshSentFaxesStatus_Scheduler)



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INSTALL THE EFAX CONNECTOR FOR SALESFORCE

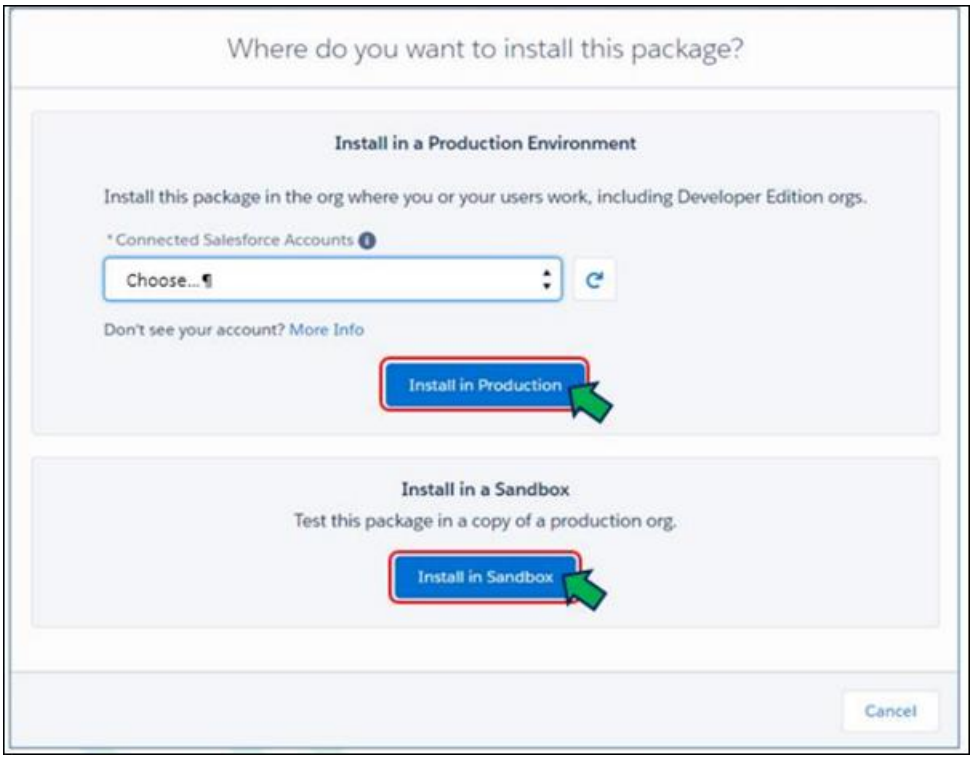
To install the eFax Connector for Salesforce via AppExchange:

1. Log into https://appexchange.salesforce.com/ and search for *eFax Connector by Consensus Cloud Solutions*, then select the **eFax** application.
2. When the app introduction screen appears, click **Get It Now**. From this point forward, the AppExchange handles the transaction.



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3. Next, click **Install in Production** or **Install in Sandbox** to indicate where you want the eFax Connector for Salesforce application. The connected Salesforce account will auto-populate with the username of the account you used to log into the AppExchange.

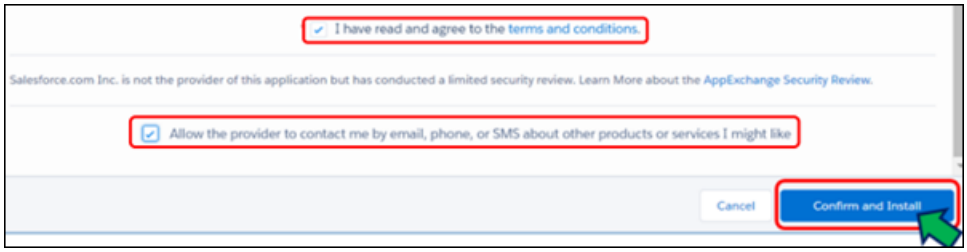


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4. In the **Confirm Installation Details** screen, confirm all installation details.

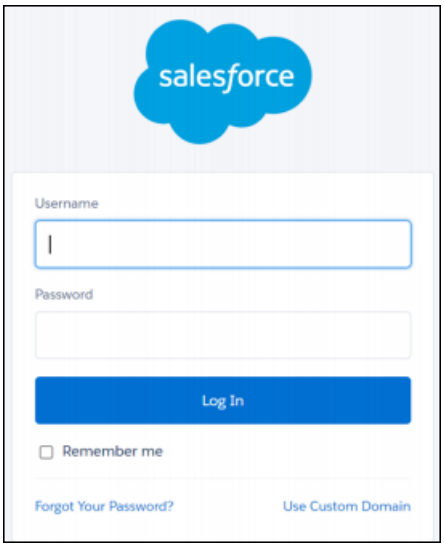


5. Check the **Terms and Conditions** box, and, if you wish, the **Allow the Provider to Contact Me** option, and finally click **Confirm and Install**.



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The Salesforce Log In dialog appears.



6. Enter your username and password of the organization where the eFax Connector for Salesforce application will be installed, and click **Log In**.

   NOTE: You may have another means of logging in. For instance, if you are using SSO for login, please copy the URL below and paste it in the browser window where you wish to log into Salesforce.

   login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t4x000000AIQ6AAO%26newUI%3D1%26src%3Du

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7. In the Install J2 eFax Connector dialog, click the **Install for All Users** tile, then **Install**. This is applicable if this is the first installation in the environment. When the request is for an upgrade, the screen is slightly different – the screen title is **Upgrade eFax Connector** and the button labels read "Upgrade."



8. To approve the eFax Connector for Salesforce for use with Consensus eFax API services, check the **Yes** option and then click **Continue**. The installation process begins.

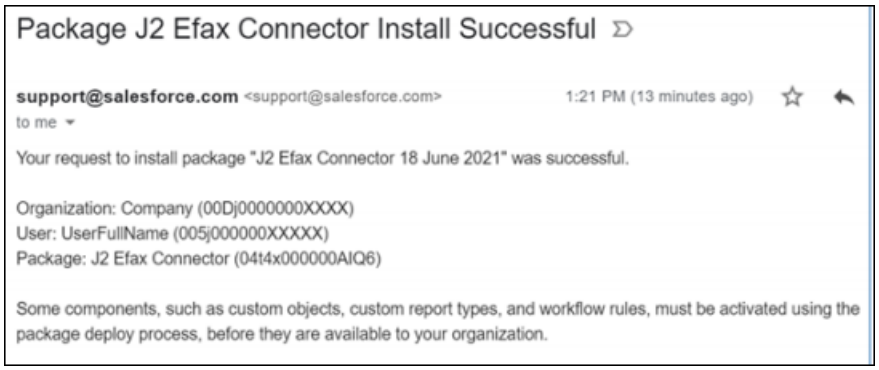


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9. When the installation is finished, click **Done** (upon installation completion, you will be notified via email).



Below is an example of the email you will receive stating that the eFax Connector for Salesforce installation was successful.

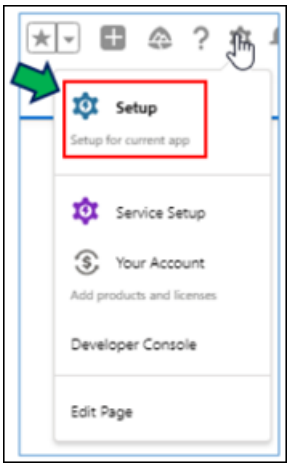


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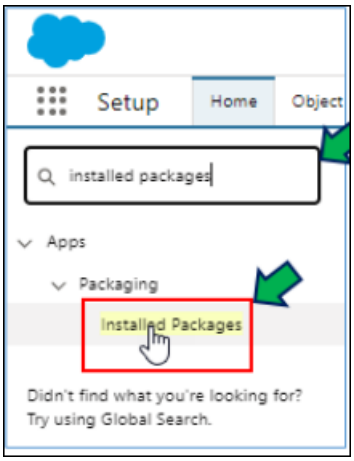
VERIFY INSTALLATION SUCCESS

Follow these steps to verify that the package installation is successful:

1. Click the Setup icon ( ) in the upper-right corner of the screen, and select Setup…



2. In the Quick Find textbox, type “Installed Packages.”



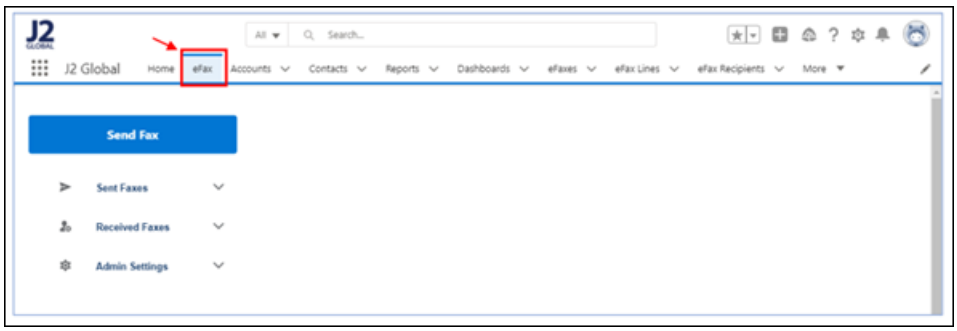
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3. Select Installed Packages and you will see eFax Connector in the list.



Once you login into Salesforce, click the eFax tab to display how to send a fax, view sent and received faxes, and access the account's administrative settings. You may use either of the following versions (see the eFax Connector for Salesforce – User Guide for instructions):

- Salesforce Lightning, which offers a new and improved interface with additional features that make it easier and more engaging for users.
- Salesforce Classic, the original interface, updated but without some key areas offered in the Lightning version.



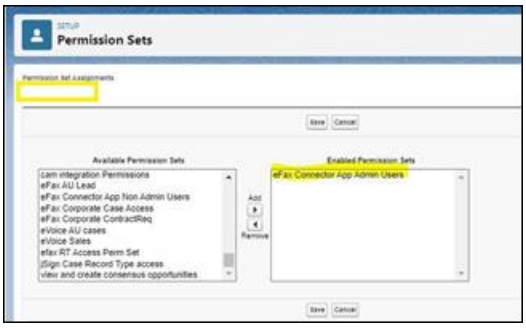
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POST INSTALLATION INSTRUCTIONS

As the eFax Connector for Salesforce administrator, you will need to enable users to access to the application. Follow these steps to do so.

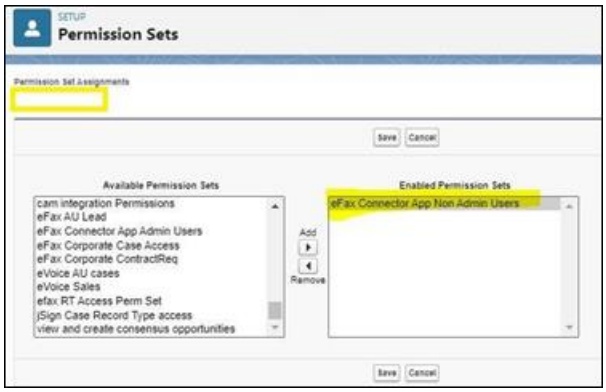
ADMIN USERS

To assign Admin permissions to users, go to **Setup > Permission Sets** and add the **eFax Connector App Admin Users** permission set to the enabled box.



NON-ADMIN USERS

To assign Non-Admin permissions to users, go to **Setup > Permission Sets** and add the **eFax Connector App Non-Admin Users** permission set to the enabled box.



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REVISION HISTORY

Version	Date	Description
1.0	November 16, 2021	First release
1.1	October 13, 2022	Changes for software upgrade

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