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eFax Connector for Salesforce – Administrator's Guide

VERSION: 1.1

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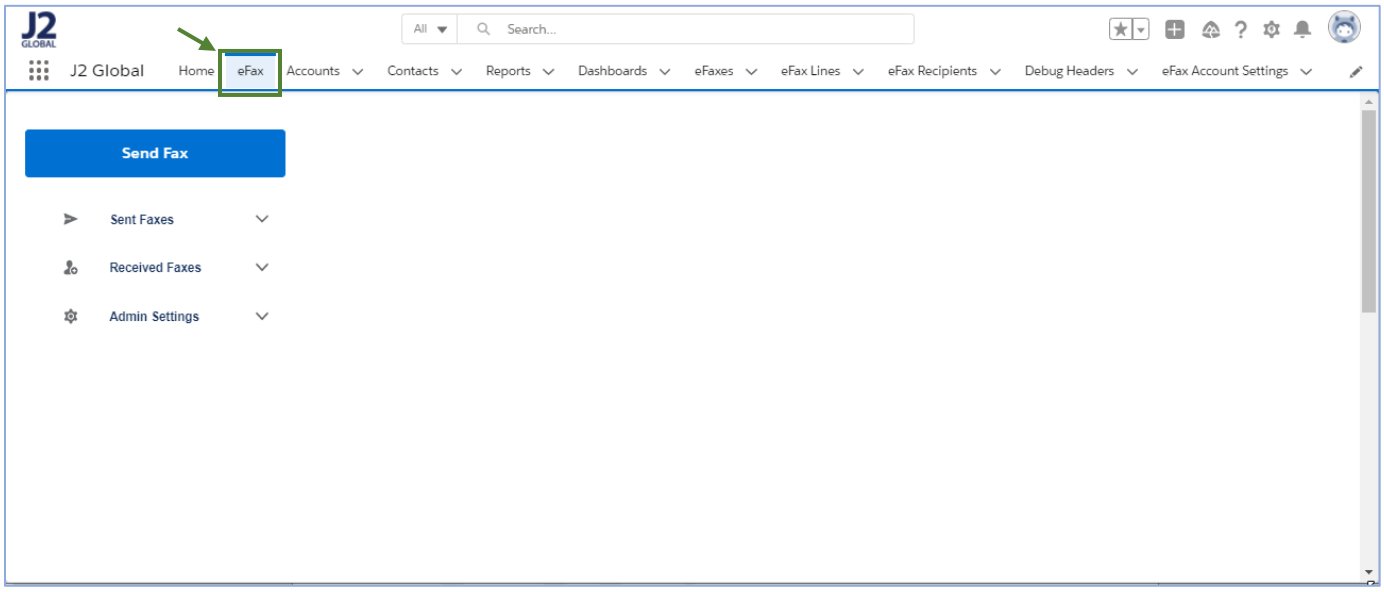
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eFAX TAB



***eFax** tab*

On the **eFax** tab in *Salesforce*:

- Users of this *eFax Connector for Salesforce* integrated app can send and receive faxes.
- The *eFax Connector for Salesforce* administrator can:
  - Link their *eFax Corporate* account to the *Salesforce* app, and configure the account.
  - Manage users (add them, enable/disable their **Send**/**Fax** privilege[s]—and more).
  - Manage fax lines (assign or unassign fax lines to users).
  - Modify/add **Send eFax** buttons to other areas of the *Salesforce* UI.

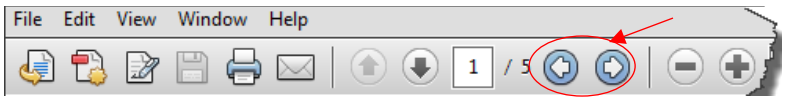
This guide is for *eFax Connector for Salesforce* administrators. (For users, see the *eFax Connector for Salesforce – User's Guide*).

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eFAX TAB (CONT.)

Important Tip!

- **For Adobe Reader X:** Add the **Forward** and **Back** navigation icons to your top toolbar. Then, when you click a **blue** linked number or word to navigate to a cross reference within this guide, you can click the **Back** button to go back where you were. (The **Forward** button takes you to where you just left.)

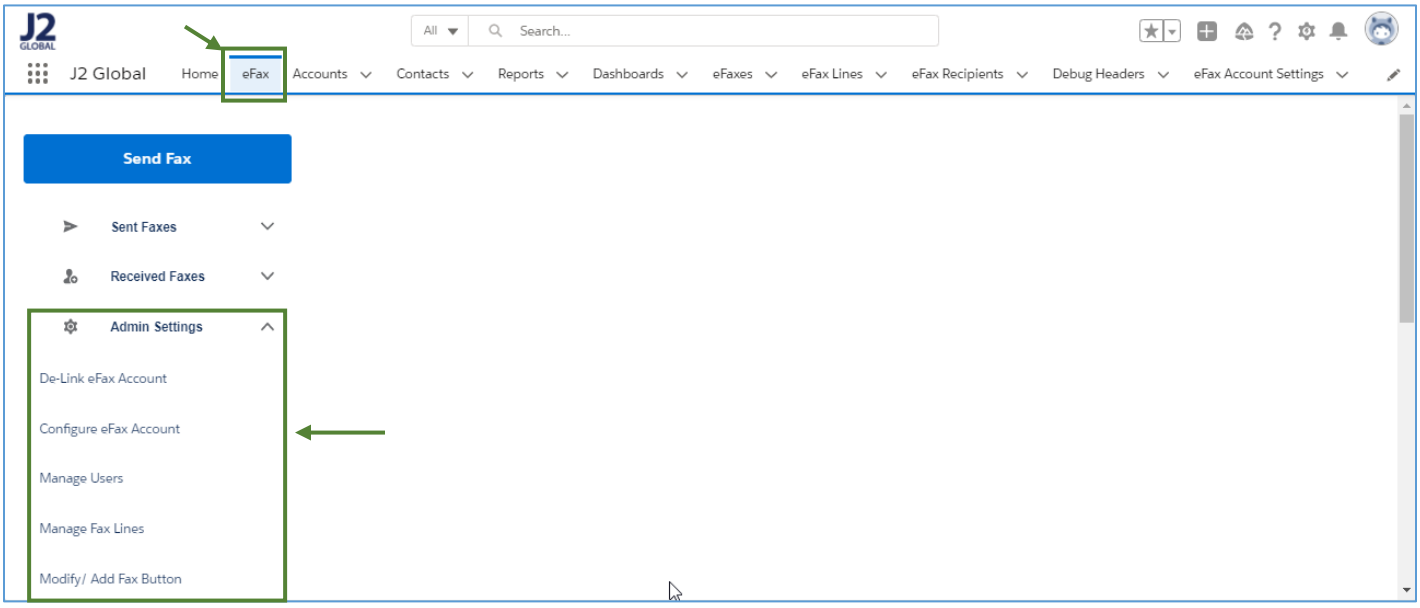


Navigation buttons in the Adobe Reader toolbar

> ✓**NOTE:** These buttons may already display if you have *Adobe Reader X*. For earlier versions of *Adobe Reader*, you can find the icons via **View > Page Navigation...**or…**View > Toolbars > Page Navigation**.

- **For Adobe Acrobat Pro DC:** When you click a **blue** linked number or word to navigate to a cross reference within this guide: Click **Alt + Left Arrow** on your keyboard—or the **View > Page Navigation > Previous View** menu in the top toolbar—to go back where you were. (**Alt + Right Arrow**—or the **View > Page Navigation > Next View**— takes you to where you just left.)

ADMIN SETTINGS



eFax (tab)> Admin Settings

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ADMIN SETTINGS (CONT.)

What do you want to do?

- Link or unlink the *eFax Corporate* account to *Salesforce* (see below).
- Configure the *eFax Corporate* account (pg. **6**).
- Manage users (pg. **8**).
- Manage fax lines (pg. **13**).
- Modify or add a fax button to other areas of *Salesforce* (pg. **21**).

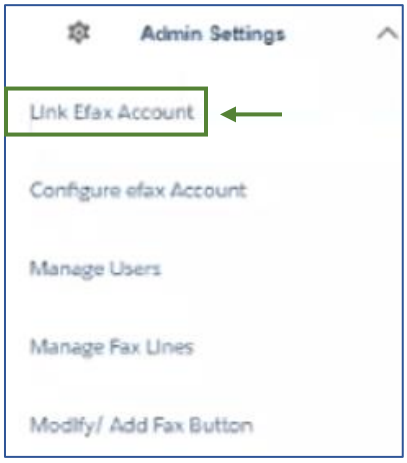
Link or Unlink the eFax Corporate Account

✓**NOTE:**

- Your account may already be linked when you access *Salesforce*. But if you don't see the *eFax* tab (pg. **2**) when you access *Salesforce*, please see your *eFax Corporate* administrator.
- Also, should you have to change the API key or the admin ID (see the table on pg. **4**), you will also have to unlink then relink the account.

- To link the *Salesforce* app to your *eFax Corporate* account:

1. Click **Link eFax Account**, under **Admin Settings** on the **eFax** tab (pg. **2**).



Admin Settings > Link eFax Account

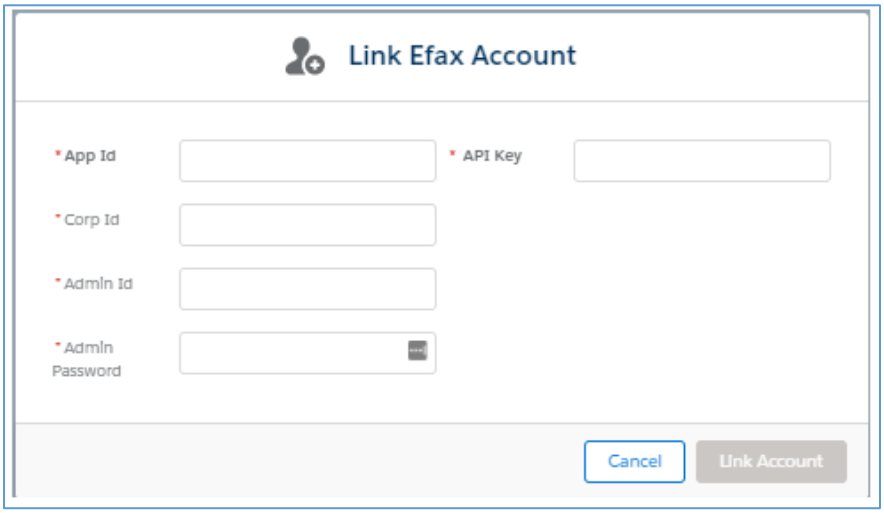
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ADMIN SETTINGS (CONT.)

Link or Unlink Your eFax Corporate Account (Cont.)

- To link the *Salesforce* app to your *eFax Corporate* account: (Cont.)

2. In the dialog, enter the following credentials.



*Linking the **eFax Corporate** account to the **Salesforce** app*

Field	Description/Instructions
App(lication) ID	As assigned to the company during API sign-up and account configuration, enter the application ID for your eFax Corporate account. .
API Key	Enter the assigned API key for your eFax Corporate account. (Along with the **App ID**, authenticates access to the *eFax Enterprise API*).
Corp(orate) ID	Enter your five-digit eFax Corporate account ID (e.g., 73548).
Admin(istrator) ID	Your username
Admin Password	(Self-explanatory)

3. Click the **Link Account** button to finish.

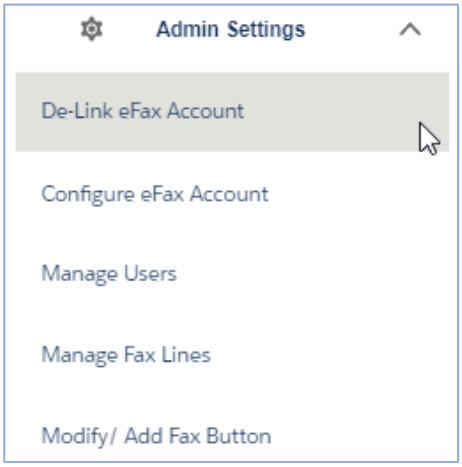
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ADMIN SETTINGS (CONT.)

Link or Unlink Your eFax Corporate Account (Cont.)

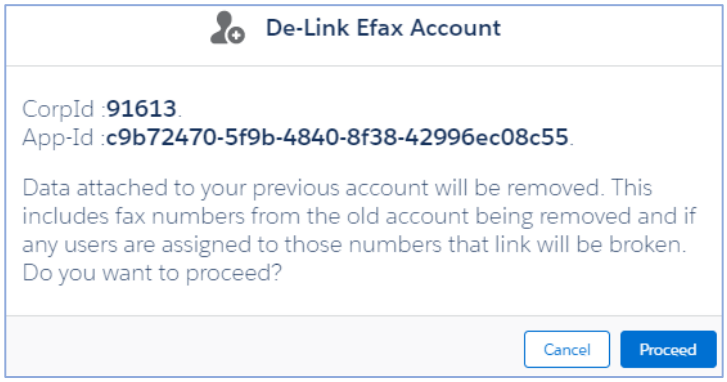
- To unlink the *Salesforce* app from your *eFax Corporate* account:

1. Click **De-Link eFax Account**, under **Admin Settings** on the **eFax** tab (pg. **2**).



*Unlinking **eFax Corporate** account from the **Salesforce** app*

2. On the **De-Link eFax Account** dialog, click **Delink Account**, then **Proceed**.



*Unlinking **eFax Corporate** from **Salesforce***

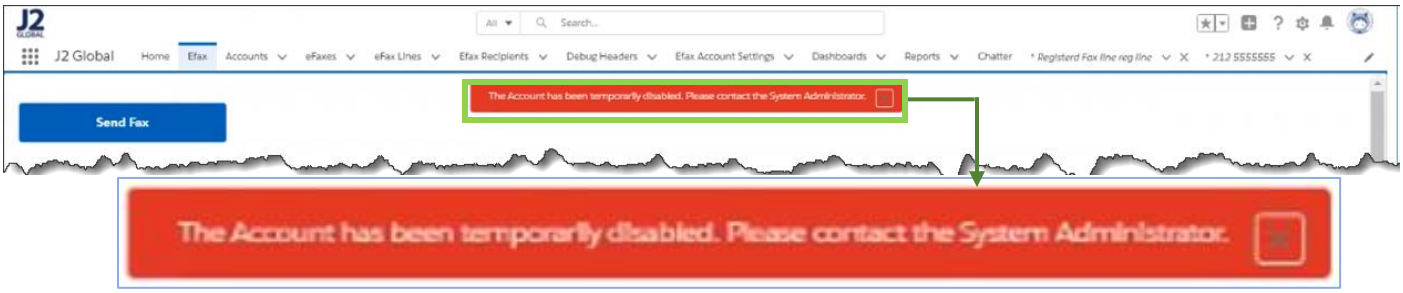
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ADMIN SETTINGS (CONT.)

Link or Unlink Your eFax Corporate Account (Cont.)

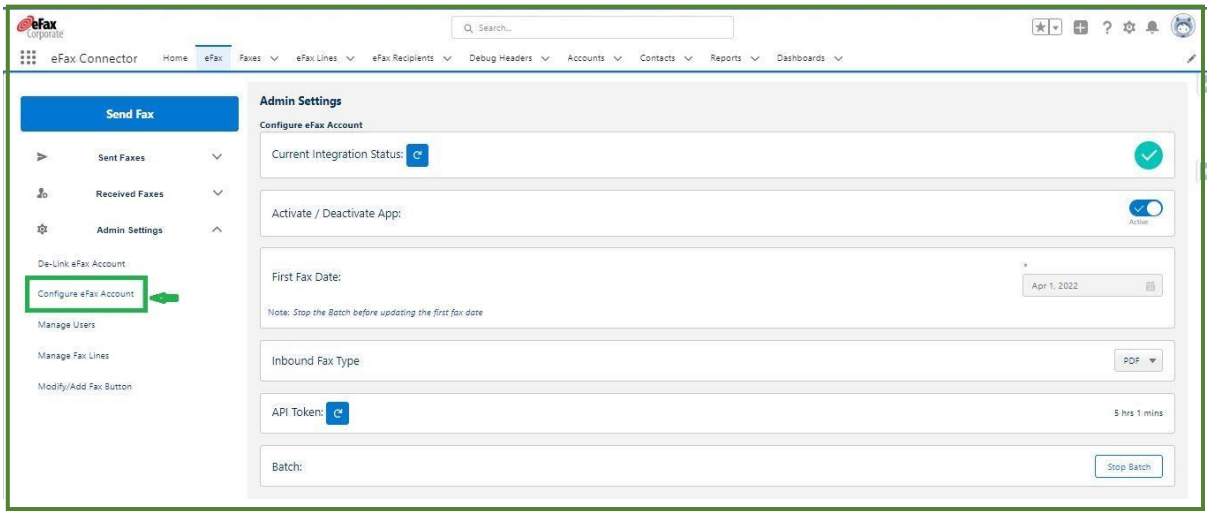
- To unlink the *Salesforce* app from your *eFax Corporate* account:

✓**NOTE:** Users will see the following system message when they access the *eFax Connector for Salesforce*.



*If the administrator unlinks the **eFax Corporate** account,*
*users will see this system message when they log into **Salesforce**.*

Configure the eFax Corporate Account



***Admin Settings > Configure eFax Account** pane*

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ADMIN SETTINGS (CONT.)

Configure the eFax Corporate Account (Cont.)

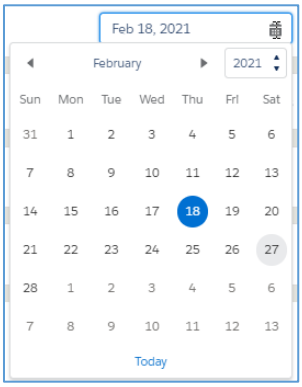
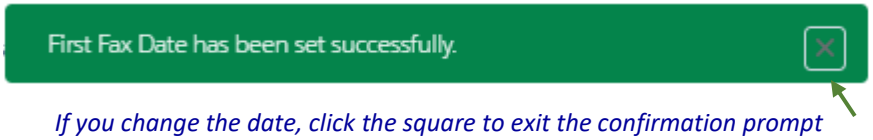
To configure the *eFax Corporate* account after linking it to the *Salesforce* application, provide the following information:

Field	Description/Instructions



Current Integration Status	Shows the current health (status) of the *eFax Enterprise API*. (If an **X** shows, click the **Refresh** icon to get the latest update.)



Activate/Deactivate App	Toggle the button on or off to temporarily prevent (or not) *eFax Corporate* users from accessing *Salesforce*. (Users will be prompted to contact you for activation.)
First Fax Date	The date defaults to when you linked the *eFax Corporate* account to *Salesforce*—which also is the date for which faxes will be managed and monitored by Salesforce. (You may click the textbox or calendar icon to change the date.) NOTE: Batches pick data from revised dates to update Salesforce. This date can be modified only if the user uses the Stop Batch option.  *You can change the date faxes are managed/monitored, if you wish*  *If you change the date, click the square to exit the confirmation prompt*

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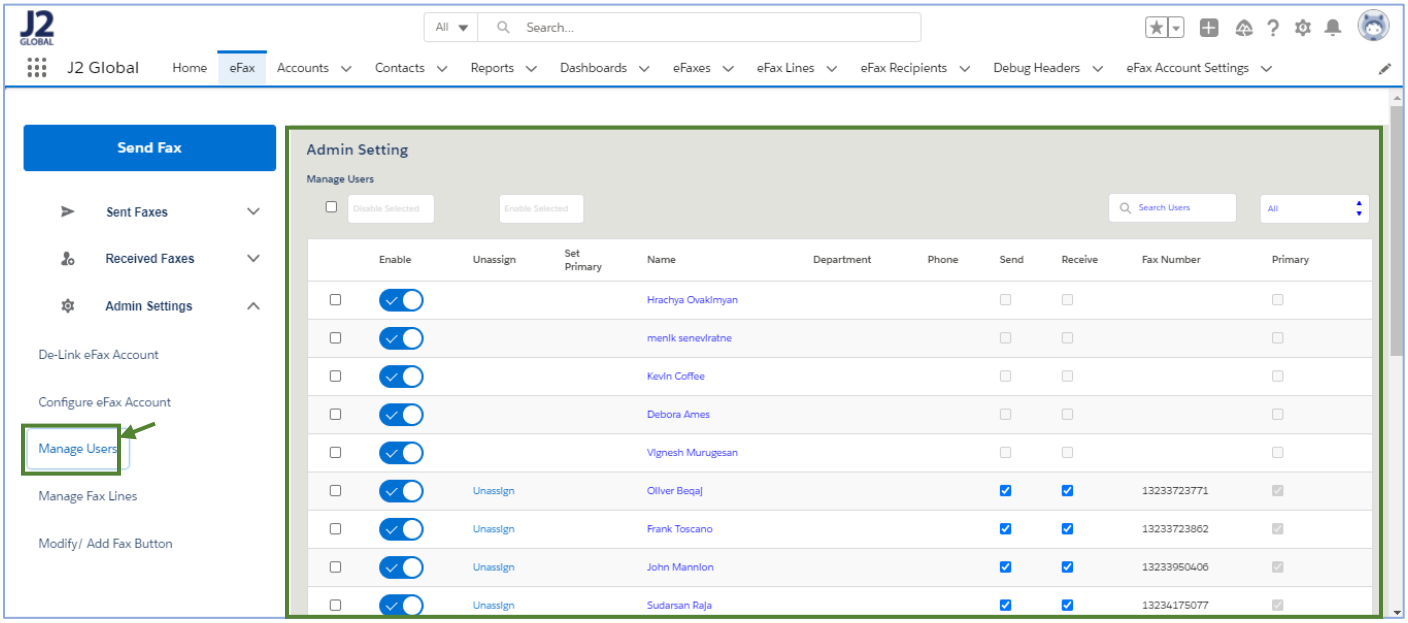
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ADMIN SETTINGS (CONT.)

Configure the eFax Corporate Account (Cont.)

Field	Description/Instructions
	
API Token	Indicates the age of the current token API in use. NOTE: The **Admin Settings -> API Token** option allows a manual refresh of the token. However, Admins do not need to refresh the API Token manually; the Batch process automatically refreshes the token before the stipulated 24 hours  *If you refresh the token, click the square to exit the confirmation prompt*
Inbound Fax Type	Select the file type for inbound faxes (PDF or TIFF).
Batch	Batches run in the background. Batches establish API calls to the eFax source system, retrieve data, and update Salesforce. When the user clicks **Start Batch**, the batch starts running in the backend and the button changes to **Stop Batch**, indicating that the batch is running, and the user can stop it if required. See also Start and Stop the Batch.

Manage Users



***Admin Settings > Manage Users** pane*

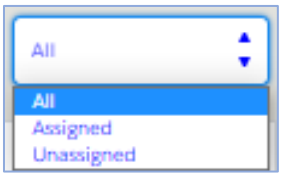
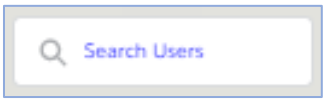
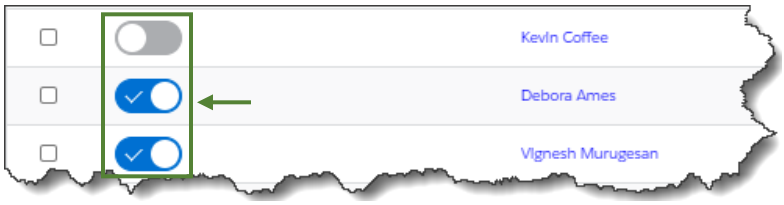
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ADMIN SETTINGS (CONT.)

Manage Users (Cont.)

On the **Manage Users** pane, you can link *Salesforce* users to *eFax Corporate* users, enable/disable their **Send/Fax** privilege(s), and more. (For actions and instructions, see the table on the next page.)

✓**NOTE:** If assigned as **Owner** to more than one fax line [see *Manage Fax Lines* on pg. **13**], a user will be listed more than once.

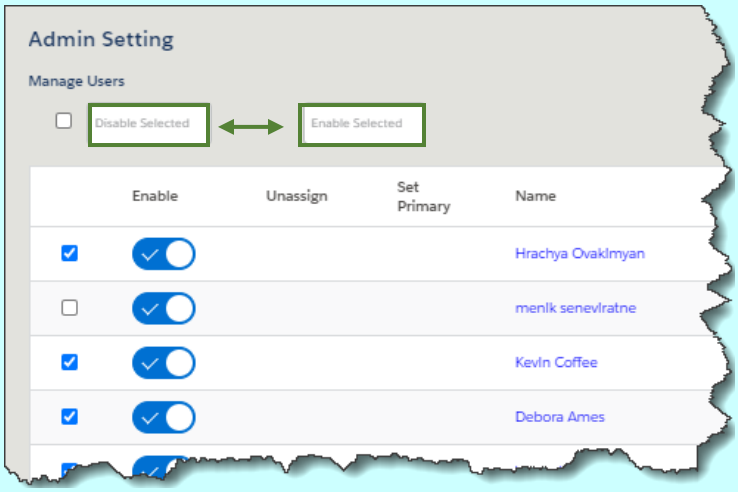
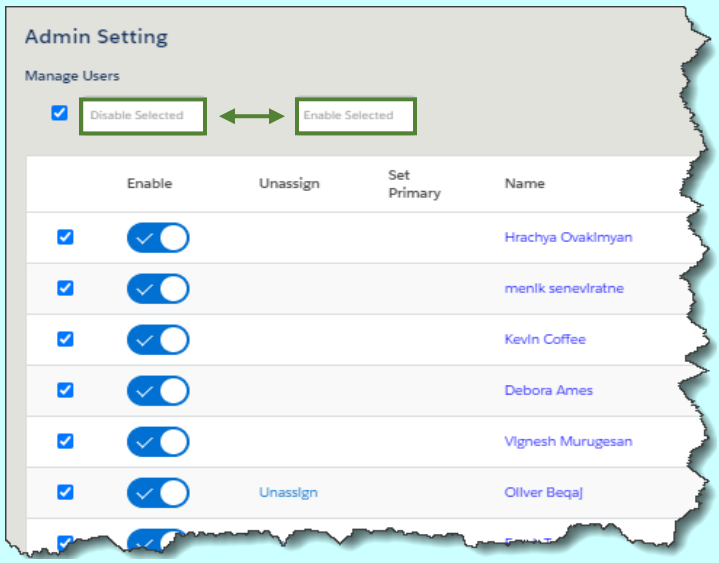
Action	Instructions
Show Assigned, Unassigned, or All Users	Click the drop-down arrow to display the users you want to see. 
Search for a User	Enter their partial/full name in the **Search Users** textbox, and press **Enter**. 
Enable or Disable a User's Fax Capability	Toggle a user's **Enable** button on or off to turn on (or not) their fax capability.  ✓ **NOTES:** • <u>If you toggle the button off (i.e., disable their fax capability):</u> Any fax lines the user has are unlinked, and the ones they owned are returned to unowned status. • <u>To disable or enable **multiple** users:</u> Check the individual boxes of those you want to enable or disable—then under the **Manage Users** header at the top-left of the pane, click **Disable Users** or **Enable Users** button.

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ADMIN SETTINGS (CONT.)

Manage Users (Cont.)

Action	Instructions
Enable or Disable a User's Fax Capability (Cont.)	✓ **NOTES: (Cont.)** • To disable or enable **multiple** users: (Cont.)  *Disable or enable multiple users* • To disable or enable **all** users: Check the box under the **Manage Users** header at the top-left of the pane (all users' boxes become checked), then click the **Disable Users** or **Enable Users** button.  *Disable or enable all users*

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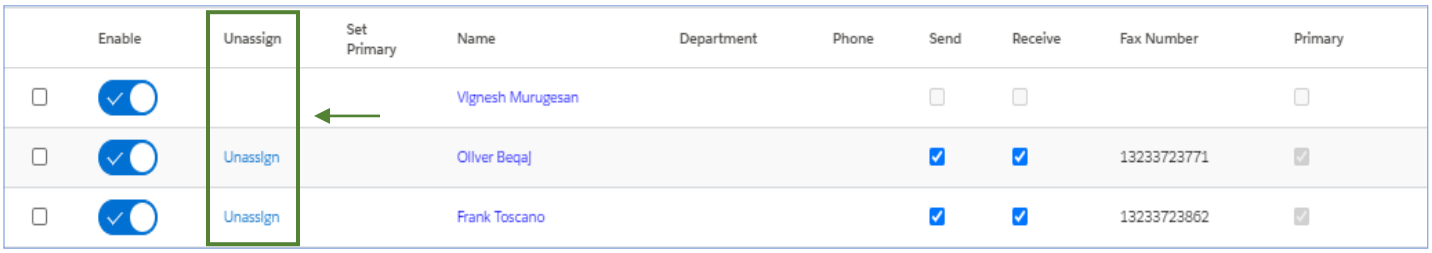
ADMIN SETTINGS (CONT.)

Manage Users (Cont.)

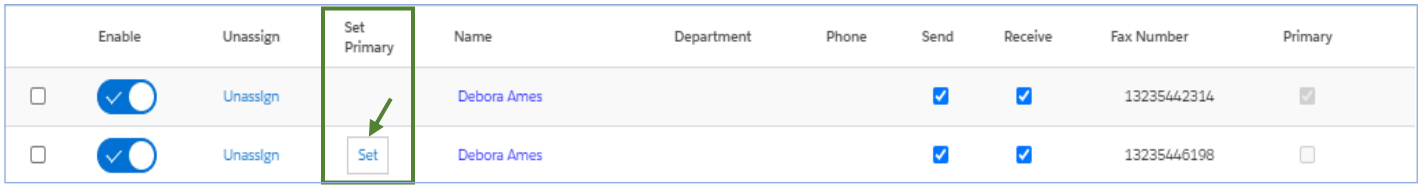
Action	Instructions



Grant Send/Receive Privileges to a User	Check a user's **Send** and/or **Receive** box(es) to let them (or not) send faxes and/or view received faxes. ✓ **NOTE:** If either box is unchecked, then user will be prompted to contact you.



Unassign a Fax Line from a User	Click the **Unassign** link to disassociate a fax line from a user. ✓ **NOTE:** Only displays if the user's **Fax Number** field is populated; if unassigned, the fax line is returned to unowned status and the user line-item no longer displays



Set a User's Primary Number	A user will be listed more than once if they have more than one fax number—and one of them will already be checked as the primary number for sending/receiving faxes. To select another number as the primary number: 1. Click its **Set** box (which only displays if the user owns multiple numbers).

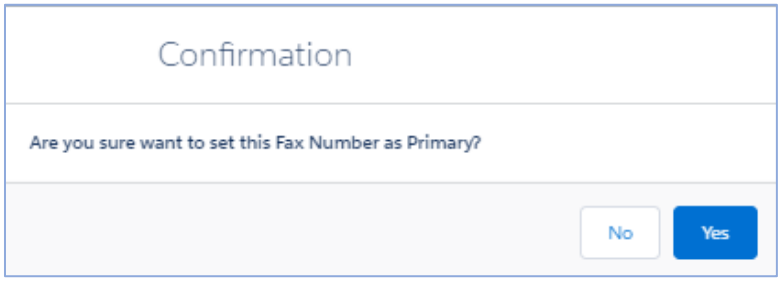
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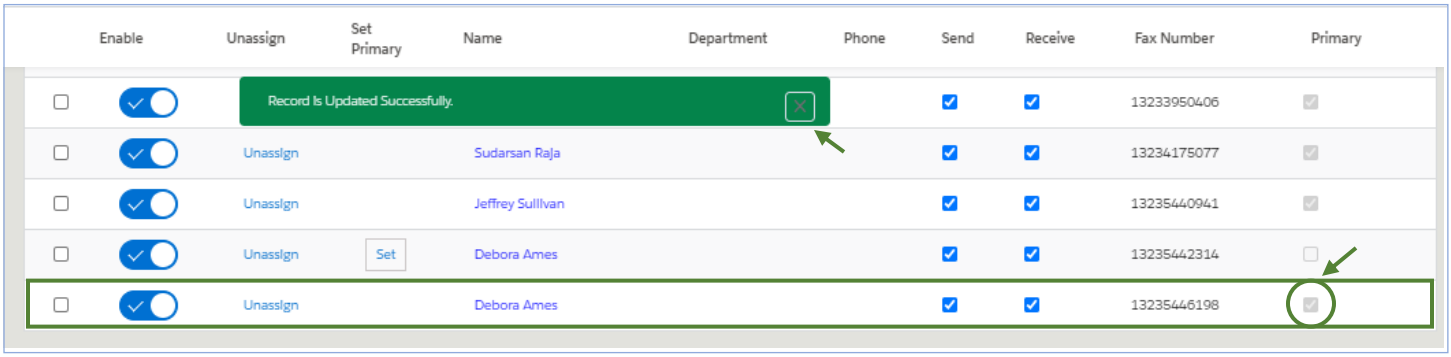
ADMIN SETTINGS (CONT.)

Manage Users (Cont.)

Action	Instructions
Set a User's Primary Number (Cont.)	2. Then, click **Yes** at the first confirmation prompt (then the green square, to exit the second prompt).



*Click **Yes**, to confirm*



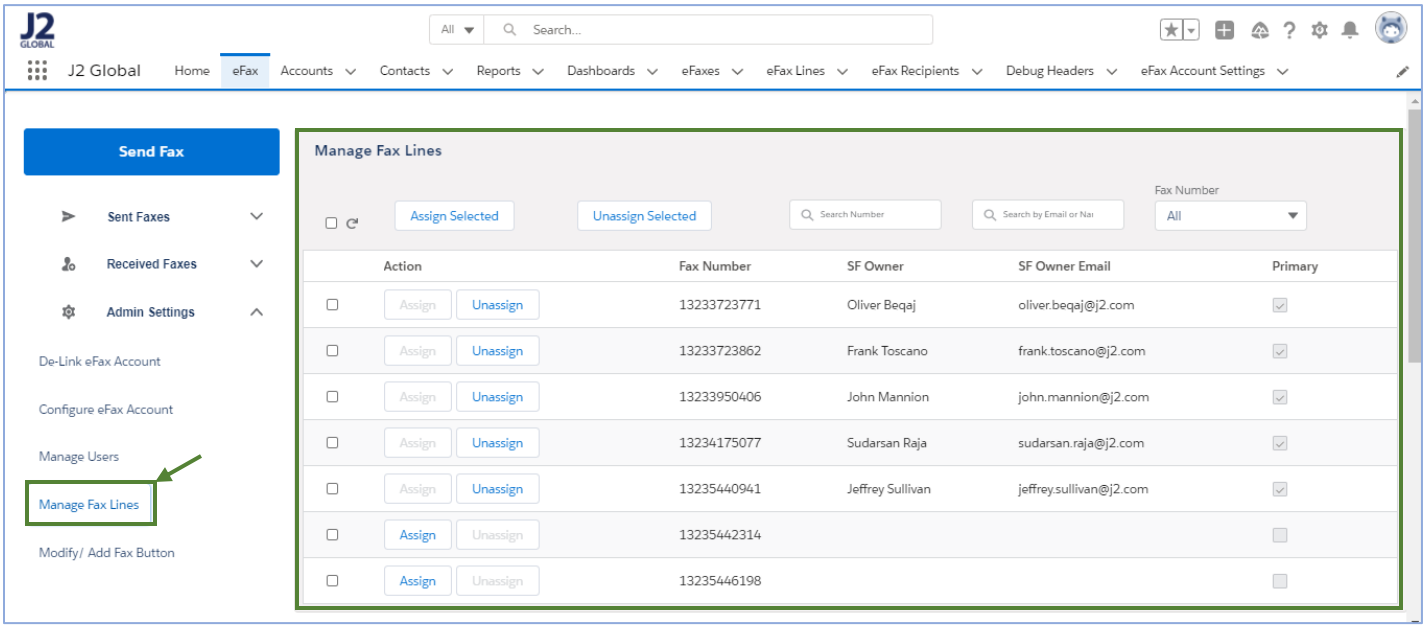
*The other number is now checked as the user's **Primary** number (and **Set** appears next to any others they have)*

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ADMIN SETTINGS (CONT.)

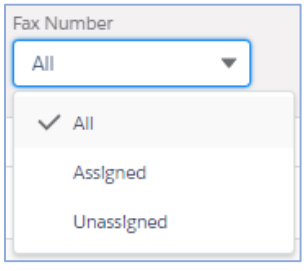
Manage Fax Lines



***Admin Settings > Manage Fax Lines** pane*

The **Manage Fax Lines** pane contains fax-line numbers associated with the linked *eFax Corporate* account. You can assign/unassign one or more lines to any *Salesforce* user. (See the table below, for actions and instructions.)

✓ **NOTE:** These numbers get pulled from your *eFax Corporate* account. If you need more numbers, log into your account to add them.

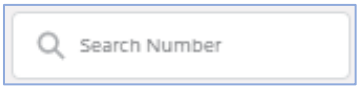
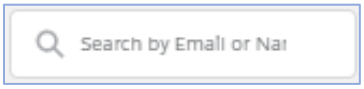
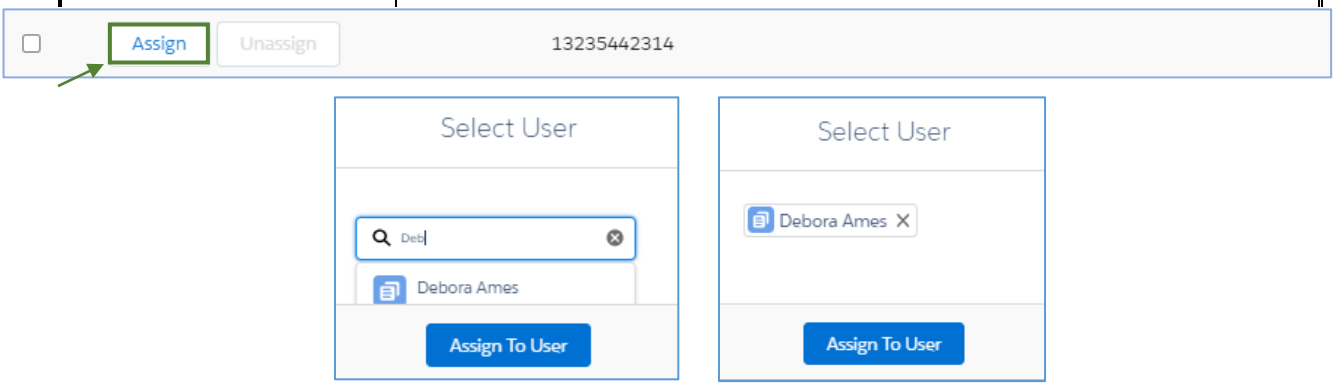
Action	Instructions
Show Assigned, Unassigned, or All Fax Numbers	Click the drop-down arrow to display the fax numbers you want to see. 

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ADMIN SETTINGS (CONT.)

Manage Fax Lines (Cont.)

Action	Instructions
Search for a Fax Number	Enter the partial/full number in the **Search Number** textbox, and press **Enter**. 
Search for a User	Enter their partial/full email address or name in the **Search by Email or No.** textbox, and press **Enter**. 
Assign a Fax Number to a User	✓ **NOTE:** All the account's fax numbers are already listed; just have to assign users to them. To assign **multiple** fax lines to **one** user: See the **NOTE** on pgs. **16-17**. 1. Click the **Assign** button—then, in the **Select User** dialog: Search for and select a user, then click **Assign User**.  *Click **Assign**, then search for and select a user*

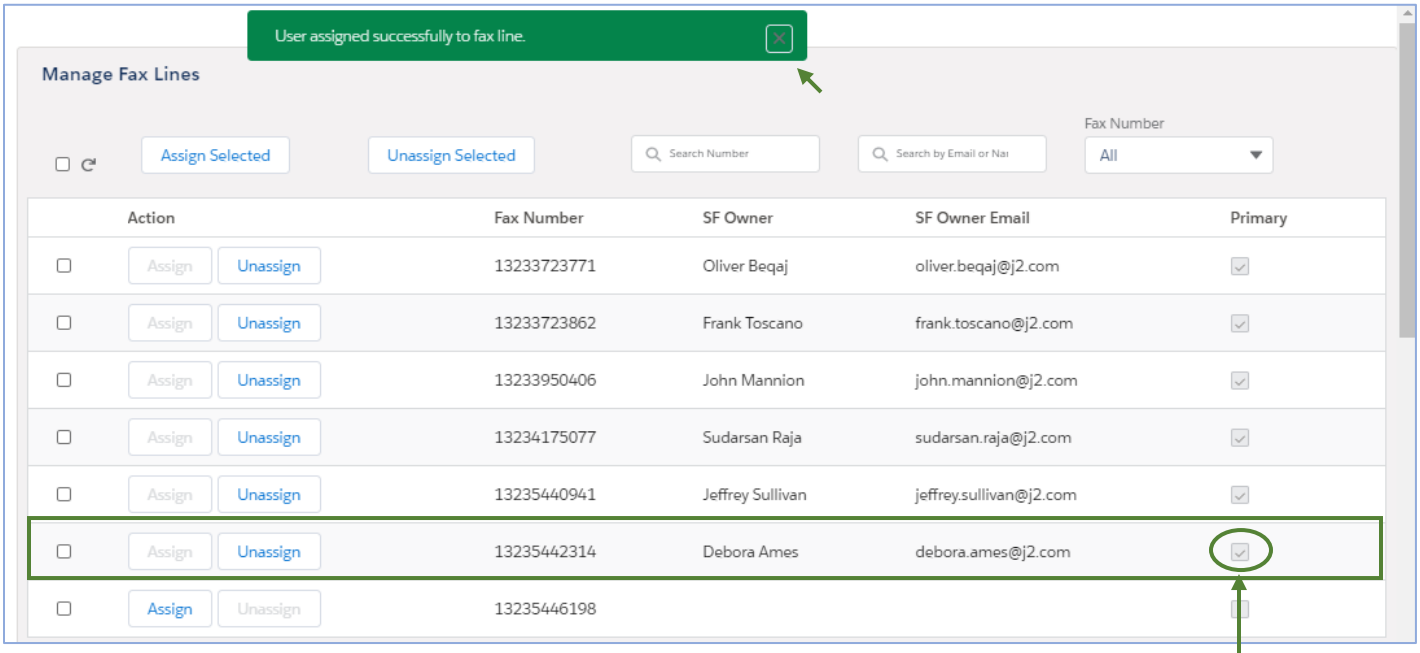
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ADMIN SETTINGS (CONT.)

Manage Fax Lines (Cont.)

Action	Instructions
Assign a Fax Number to a User (Cont.)	2. At the confirmation prompt: Click the square, to exit.



✓ **NOTE:** If a user only owns <u>one</u> fax line, then their **Primary (Number)** box is auto-checked. (If they own more than one, then to set another number as the **Primary**, see **Set a User's Primary Fax Number** on pgs. **11-12**, under *Manage Users*).

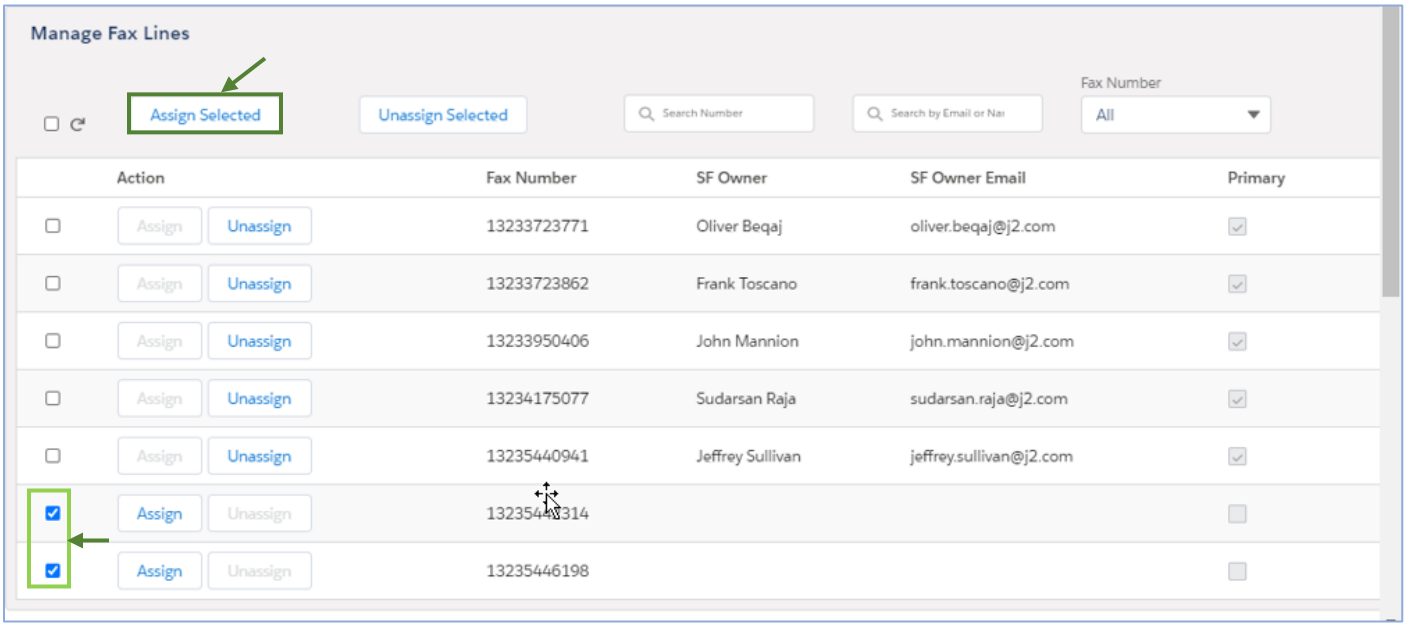
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ADMIN SETTINGS (CONT.)

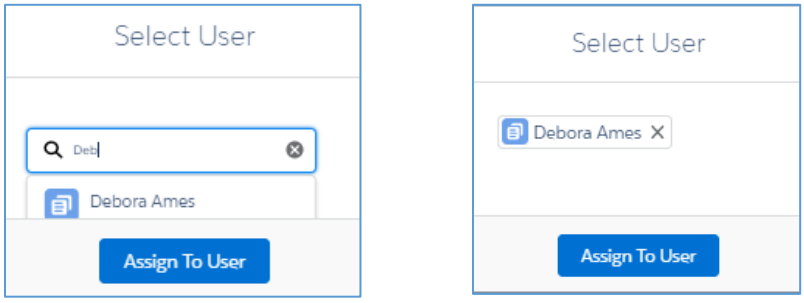
Manage Fax Lines (Cont.)

Action	Instructions
Assign a Fax Number to a User (Cont.)	✓ **NOTE:** To assign **multiple** fax numbers to **one** user: 1. In the **Manage Fax Lines** pane, check the boxes of the numbers you want to assign, then click the **Assign Selected** button at the top of the pane.



Assigning two numbers to a single user

	2. In the **Select User** dialog, search for and select a user; then click **Assign User.**



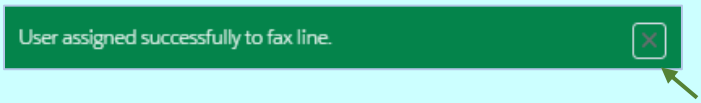
*Look for and select a user, then click **Assign to User***

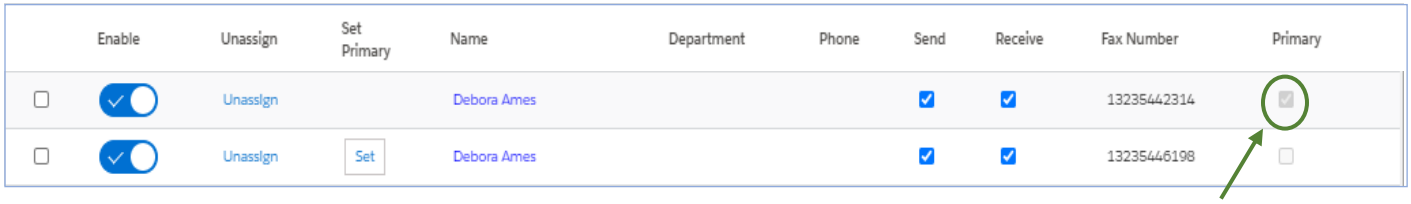
Continued on next page

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ADMIN SETTINGS (CONT.)

Manage Fax Lines (Cont.)

Action	Instructions
Assign a Fax Number to a User (Cont.)	✓ **NOTE:** To assign **multiple** fax numbers to **one** user: (Cont.) 3. At the confirmation prompt: Click the square, to exit.  In addition: • If the user is already listed (in the **Manage Fax Lines** pane) with a single number, then that number remains checked as the **Primary** number. • If user is not already listed, then the first number you selected for the user is auto-checked as the **Primary** number.



If assigning multiple numbers to a user, the first one selected is auto-checked as the primary number

Unassign a Fax Number from a User	✓ **NOTE:** To unassign all fax lines from **all** users: See the **NOTE** on pgs. **19-20**. 1. Click the **Unassign** button.



*Click **Unassign…***

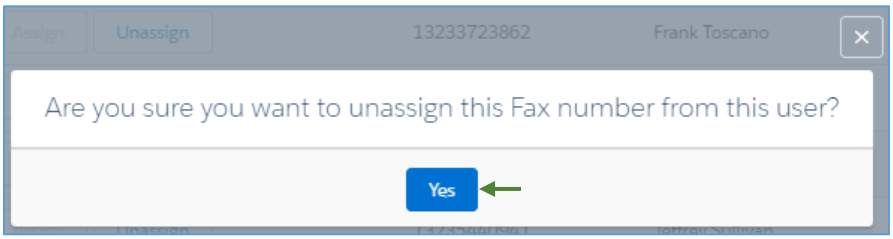
Continued on next page

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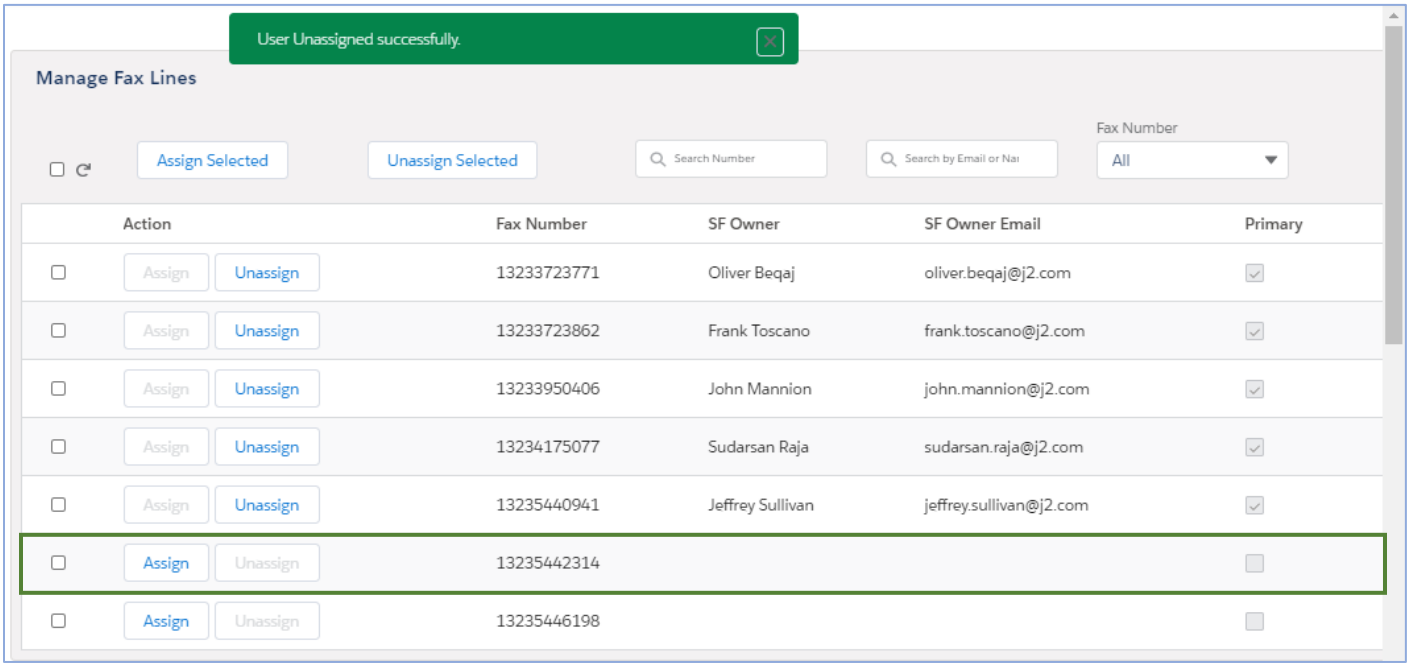
ADMIN SETTINGS (CONT.)

Manage Fax Lines (Cont.)

Action	Instructions
Unssign a Fax Number to a User (Cont.)	2. Click **Yes** at the first confirmation prompt (then the green square, to exit the second prompt). The user's name no longer appears next to that fax line, and the number is returned to unowned status.



*…then **Yes** at the confirmation prompt*



User's name no longer appears next to the unassigned number

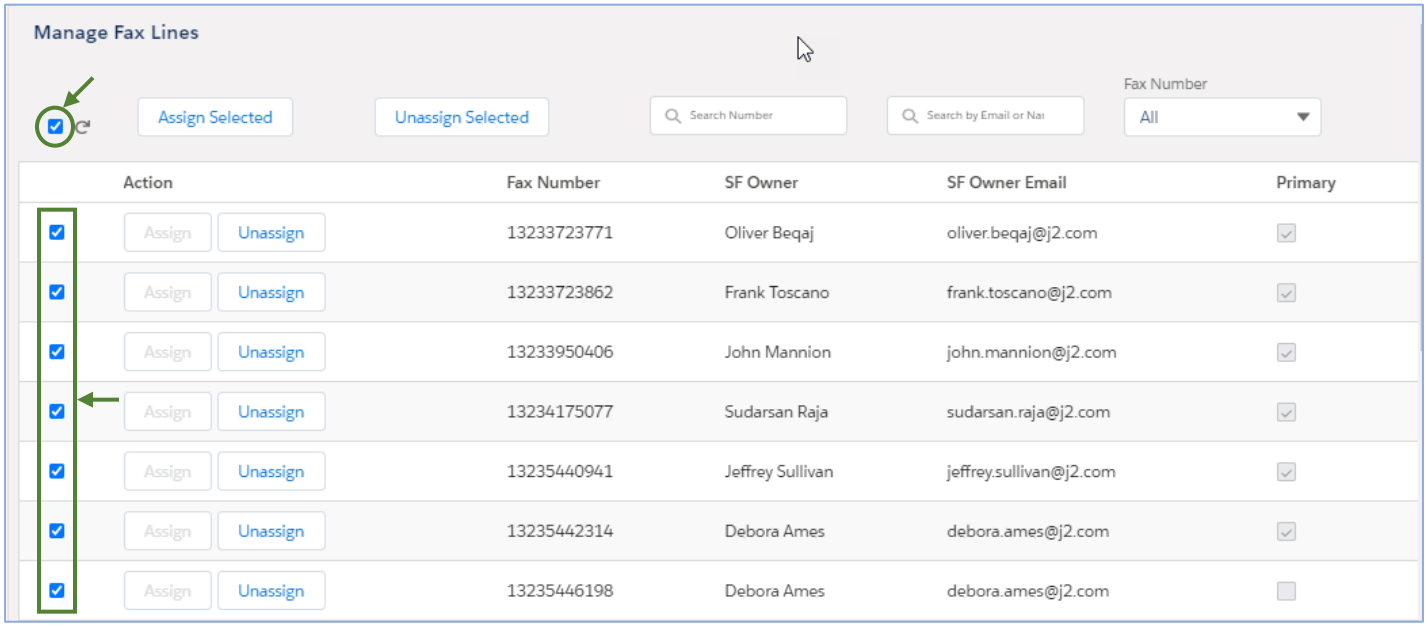
Continued on next page

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ADMIN SETTINGS (CONT.)

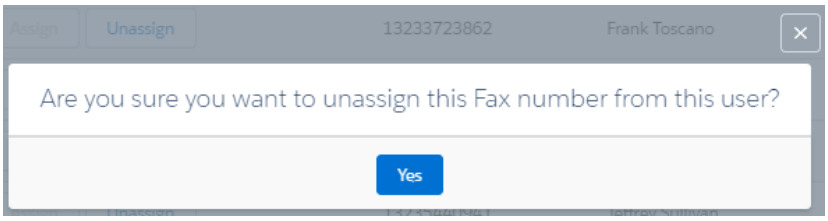
Manage Fax Lines (Cont.)

Action	Instructions
Unassign a Fax Number from a User (Cont.)/	✓ **NOTE:** To unassign **all** fax lines from **all** users: 1. Under the **Manage Fax Lines** header at the top-left of the pane: Check the box (all users' boxes are auto-checked), then click the **Unassign Selected** button.



Unassigning all numbers from all users

2. Click **Yes** at the confirmation first confirmation prompt…



*Click **Yes** at the confirmation*

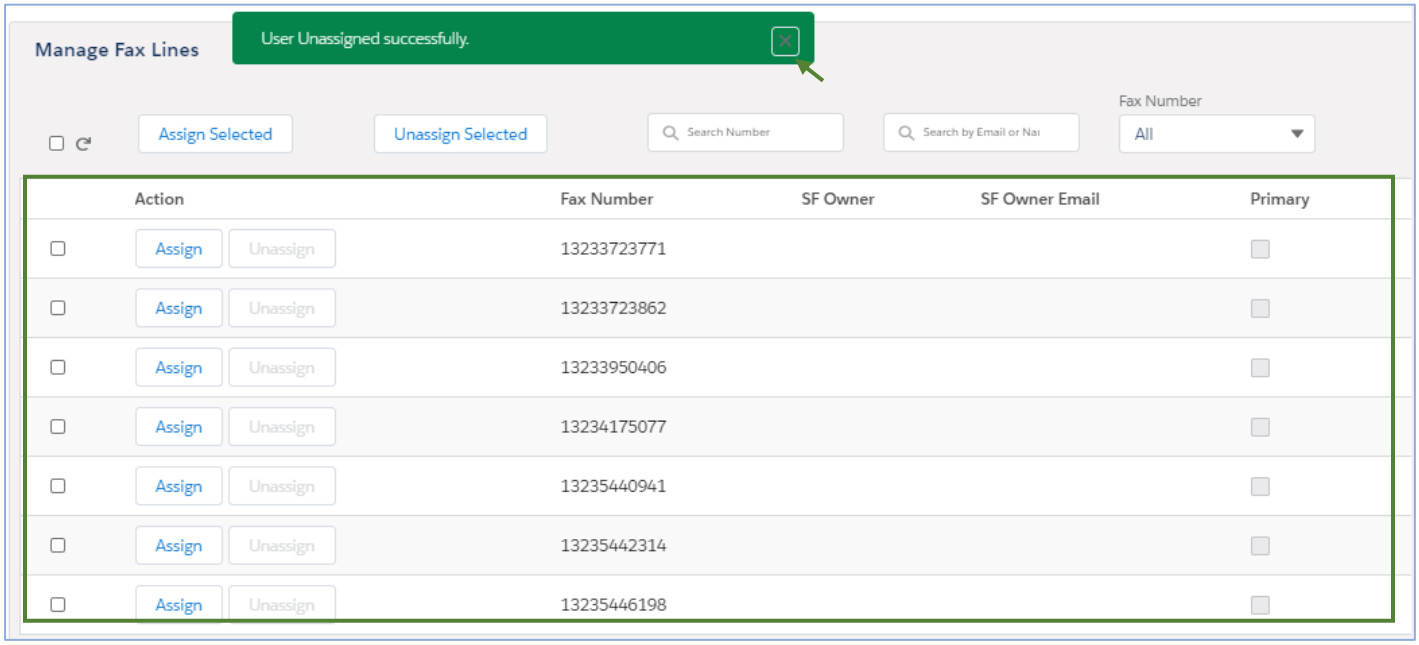
Continued on next page

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ADMIN SETTINGS (CONT.)

Manage Fax Lines (Cont.)

Action	Instructions
Unassign a Fax Number from a User (Cont.)/	✓ **NOTE:** To unassign **all** fax lines from **all** users: (Cont.) **…**then the green square, to exit the second prompt. The users' names no longer appears next to that fax line, and the number is returned to unowned status.



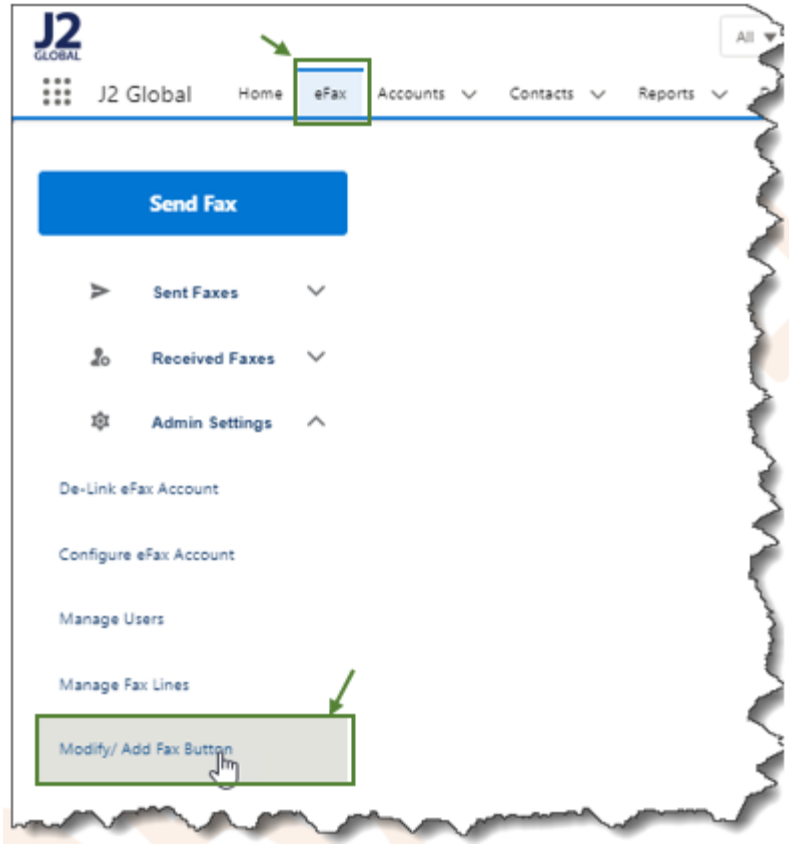
Users' names no longer appear next to the unassigned number

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ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button

1. On the **eFax** tab, click the **Admin Settings** drop-down arrow, then the **Modify/Add Fax Button** button.



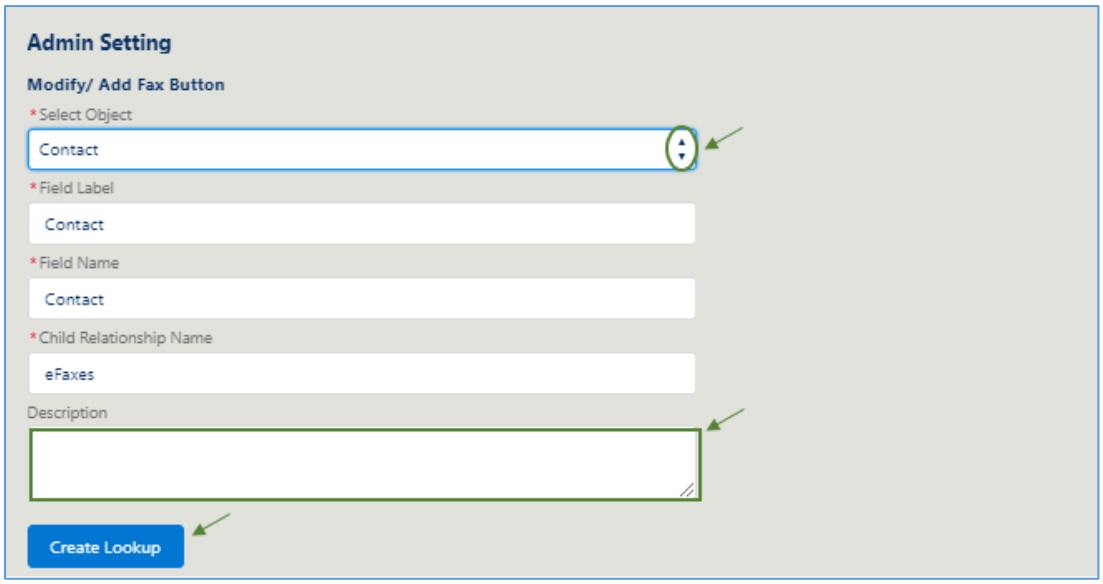
***eFax** tab*

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ADMIN SETTINGS (CONT.)

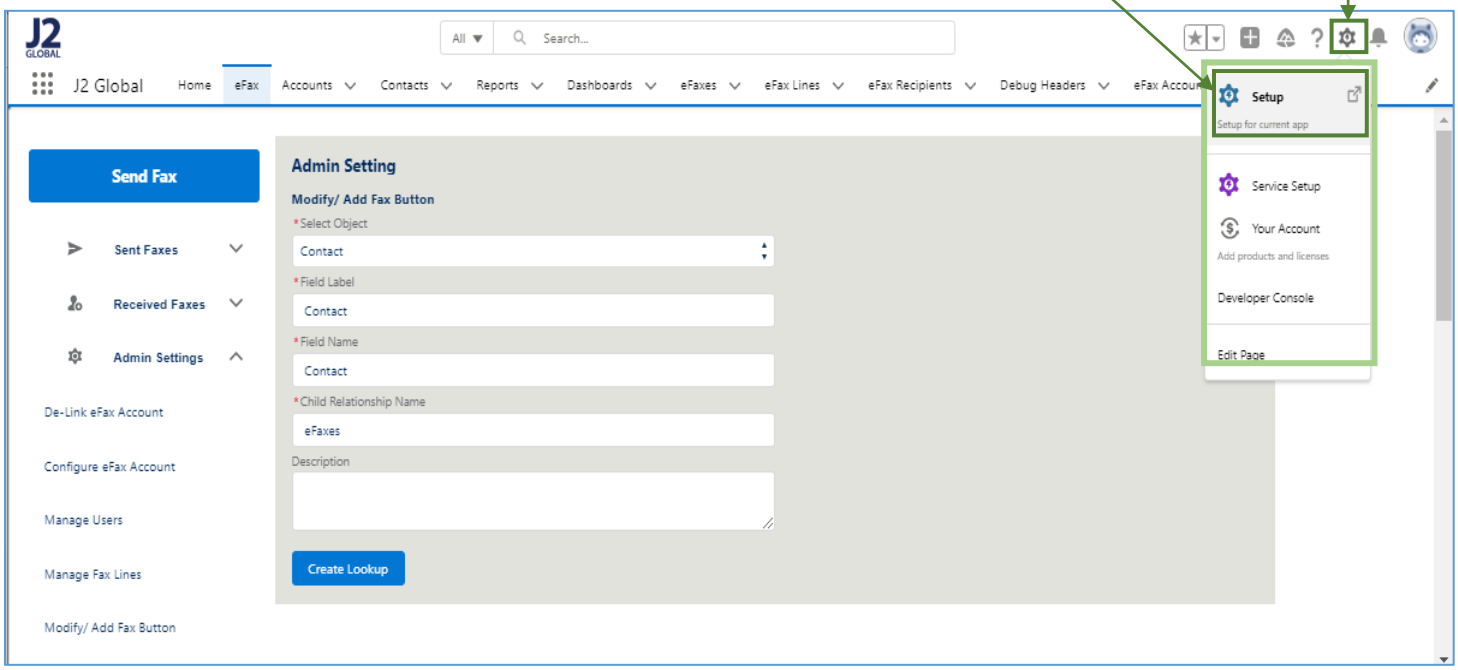
Modify/Add a Fax Button (Cont.)

2. In the **Admin Setting** pane: Click the **Select Object** drop-down arrow, make a selection (i.e., **Contact**; the next three fields auto-populate), enter a description (optional)—then click **Create Lookup**.



***Admin Setting** pane*

3. Click the **Settings** icon ( ) in the upper-right corner of the screen, then **Setup**.



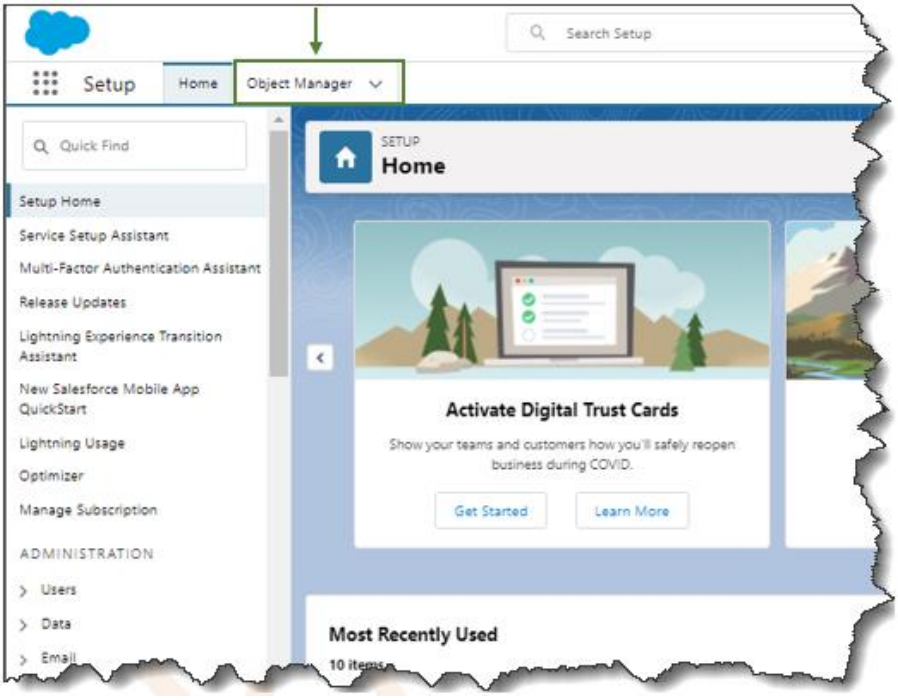
*Click the **Settings** icon, then **Setup***

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ADMIN SETTINGS (CONT.)

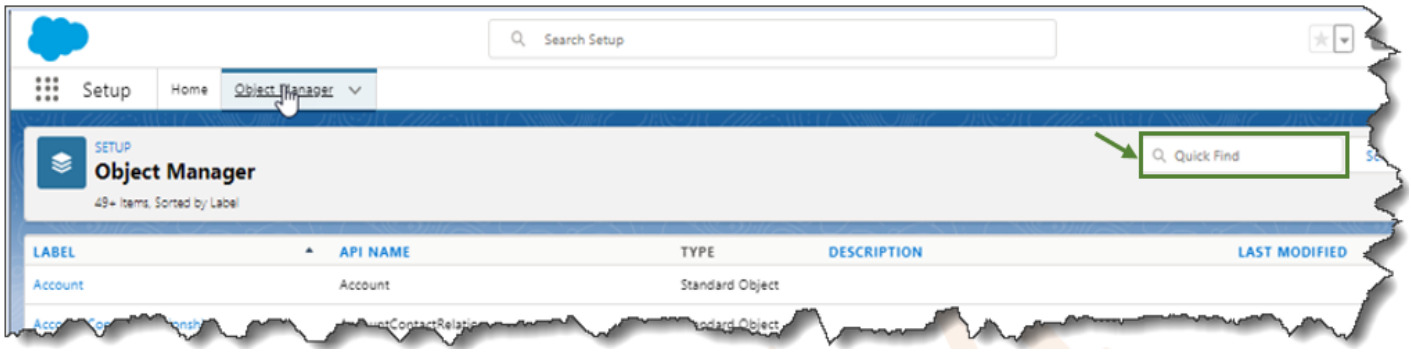
Modify/Add a Fax Button (Cont.)

4. On the **Setup** screen, click the **Object Manager** tab.



*Click the **Object Manager** tab*

5. On the **Object Manager** screen: Enter the name of the object (you just created, i.e., **Contact**) in the **Quick Find** textbox…



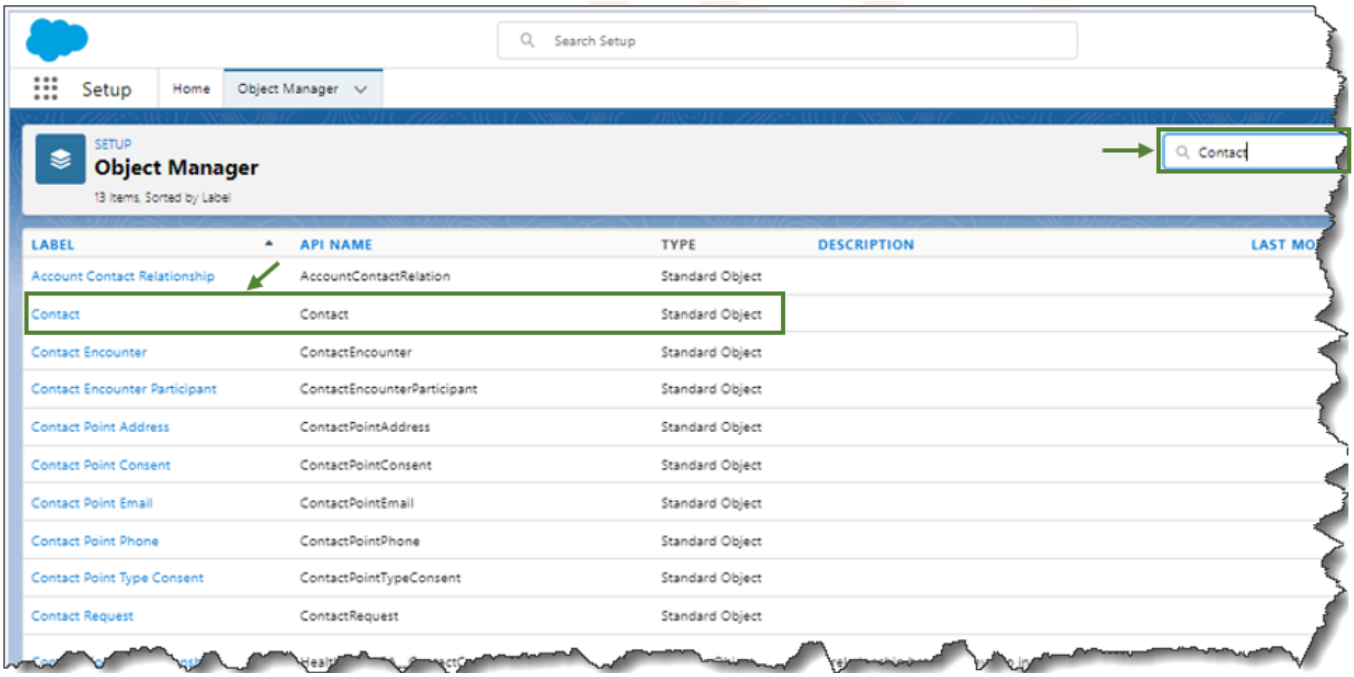
*Enter the name of your object (e.g., **Contact**) in the **Quick Find** textbox*

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ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button (Cont.)

…then select it from the **Label** column in the search results.



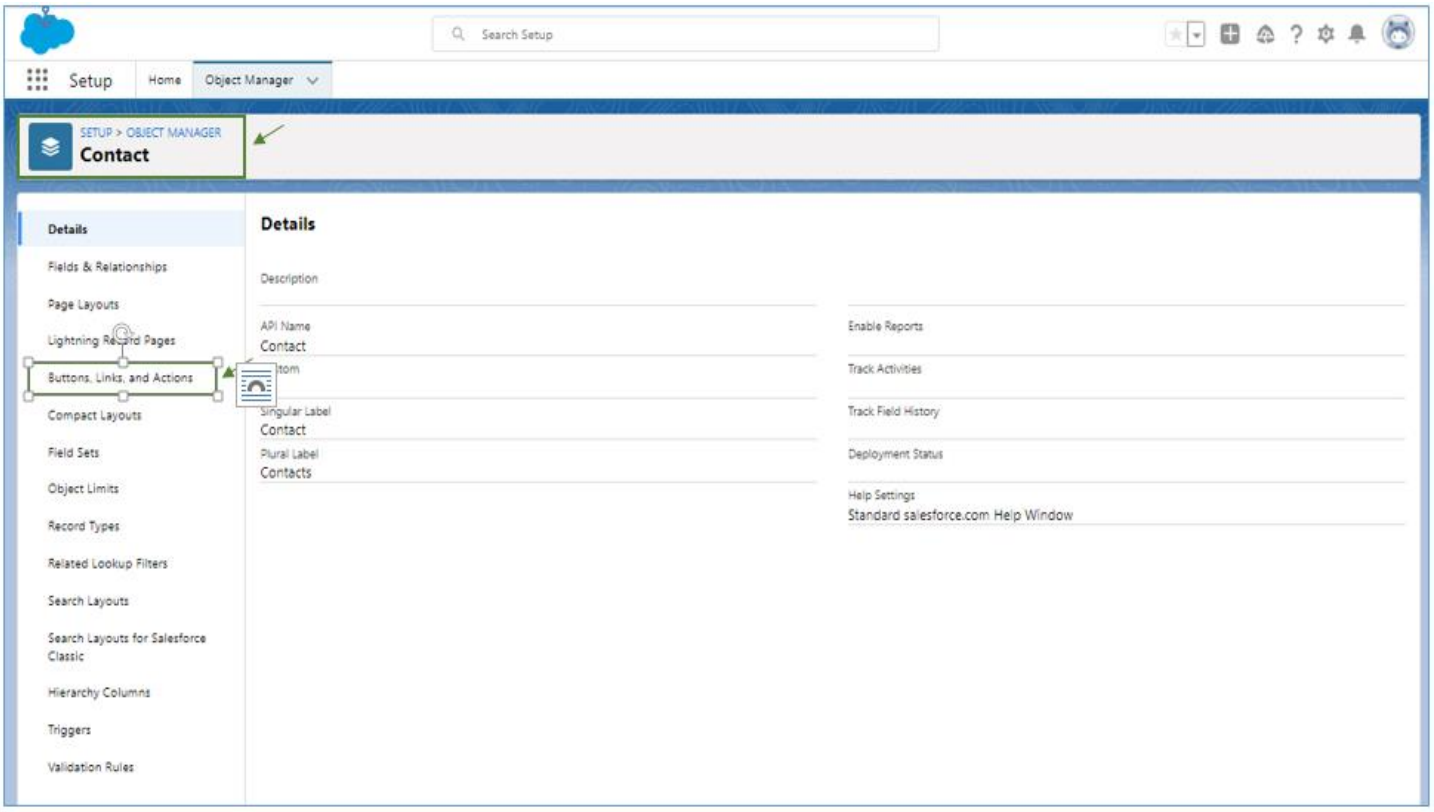
*Select the object you created (e.g., **Contact**)*

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ADMIN SETTINGS (CONT.)

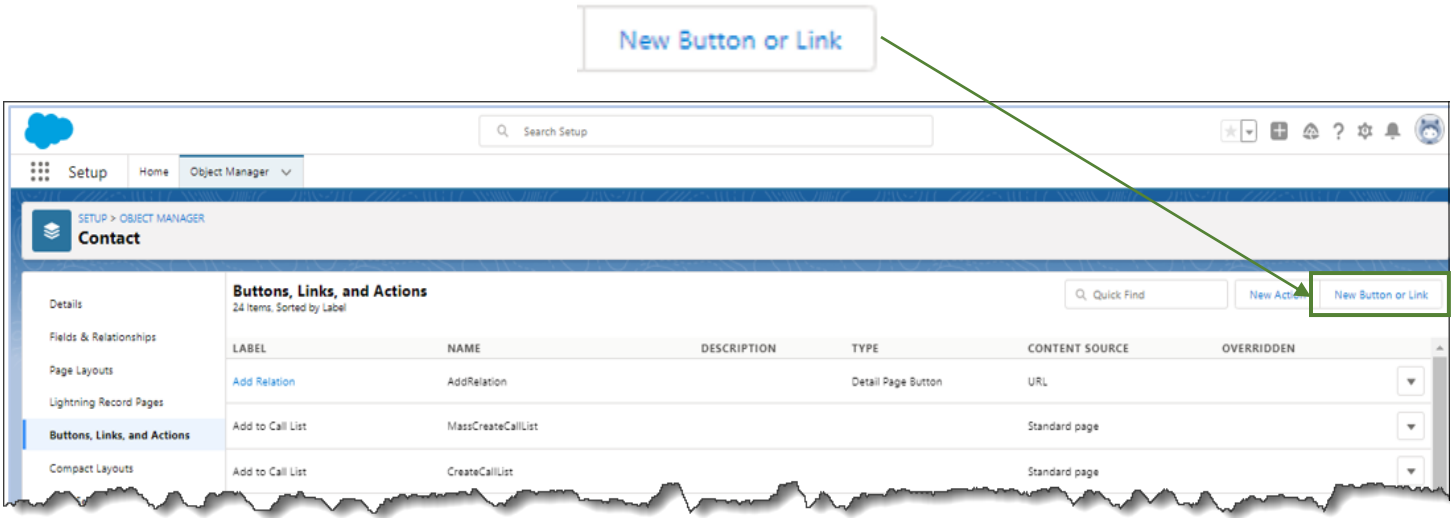
Modify/Add a Fax Button (Cont.)

6. On the object's (i.e., **Contact**) screen, click **Buttons, Links, and Actions** in the left navigation pane…



*Click **Buttons, Links, and Actions** on the object's screen…*

…then on the **Buttons, Links, and Actions** screen, click the **New Button or Link** button to the right.



*…then **New Button or Link** in the upper-right corner of the screen*

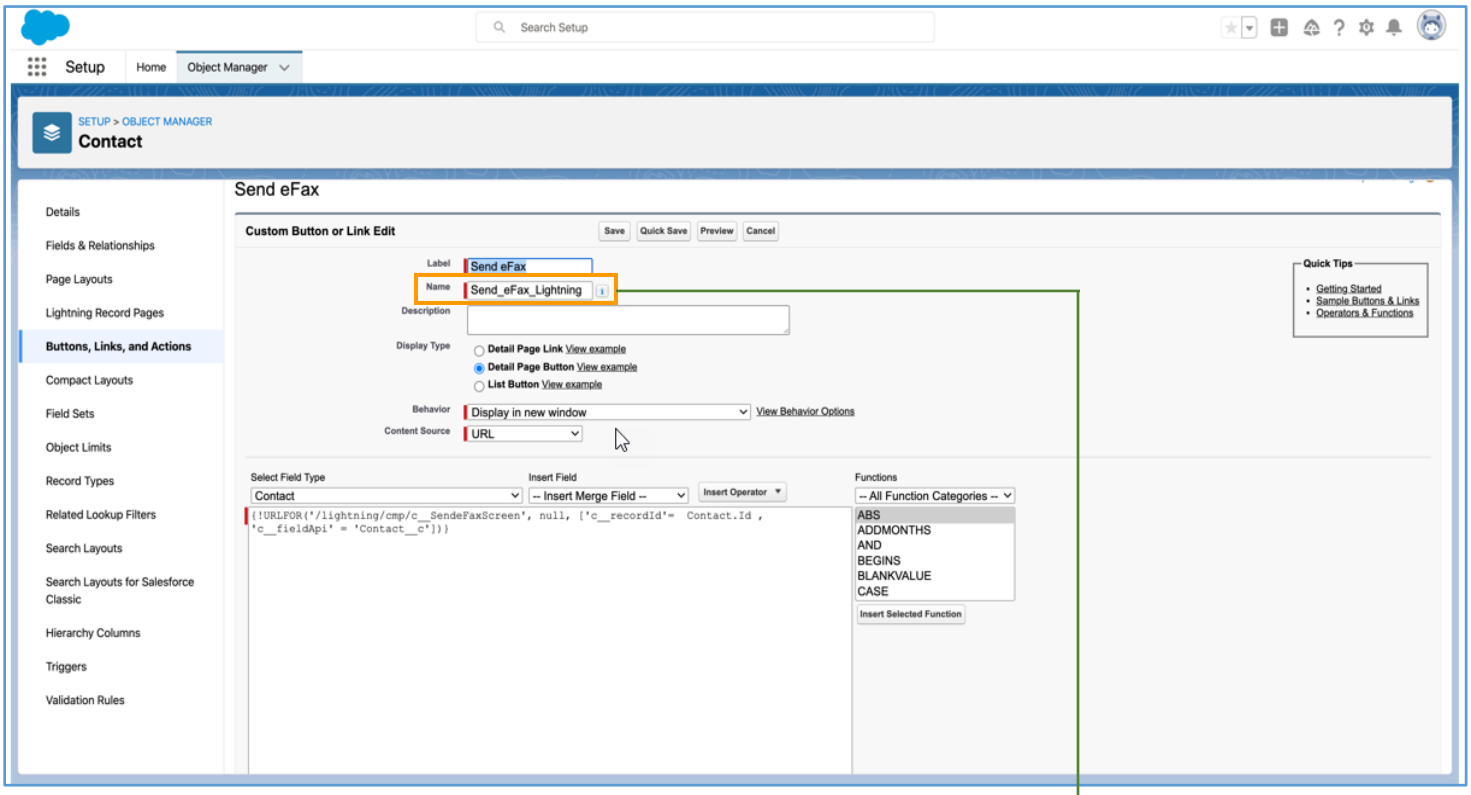
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ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button (Cont.)

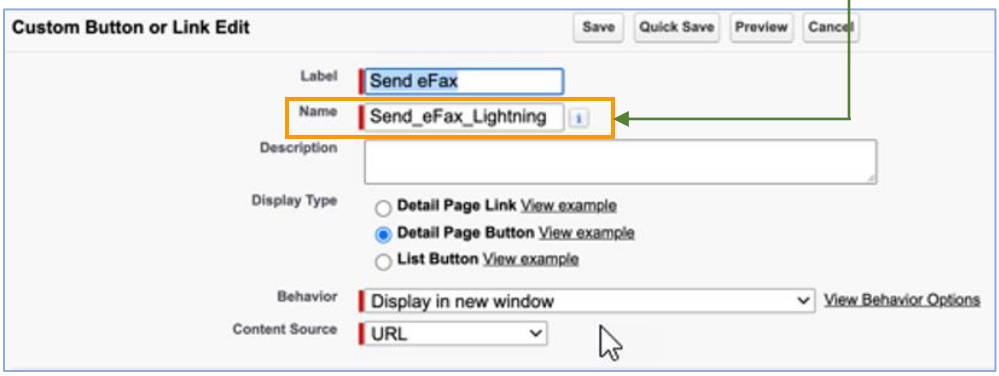
7. On the **Send eFax** screen that appears, you can create a **Send eFax** button for the *Lightning* version of *Salesforce* (see the bullet below) and/or the *Classic* version (see the bullet on pg. **28**).

   - To configure a **Send eFax** button for the ***Lightning* version** of *Salesforce*:



*Configuring a **Send eFax** button for **Salesforce Lightning***

a. In the **Custom Button or Link Edit** pane:



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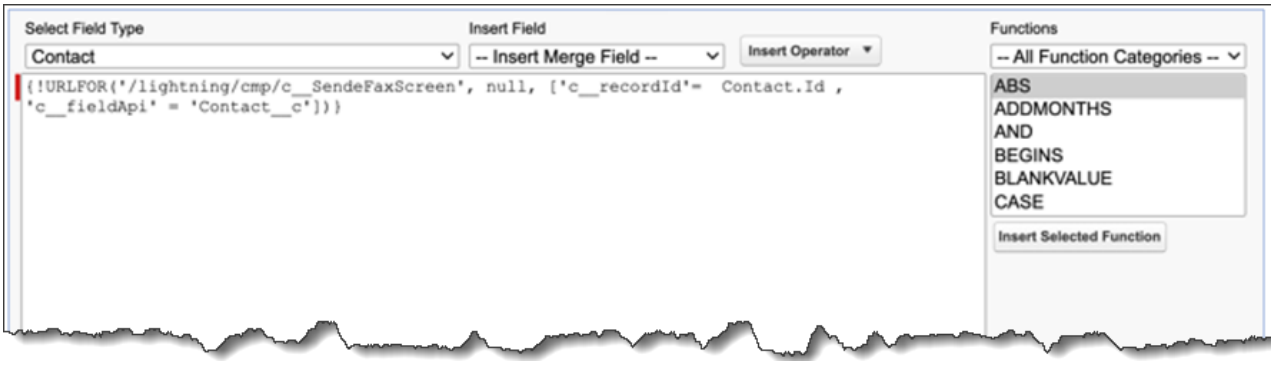
ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button (Cont.)

- To configure a **Send eFax** button for the ***Lightning* version** of *Salesforce*: (Cont.)

1) Enter **Send eFax** in the **Label** field.
2) Enter **Send_eFax_Lightning** in the **Name** field.
3) Enter a description. (Optional)
4) For **Display Type**, click the **Detail Page Button** radio button.
5) Click the **Behavior** drop-down arrow, and select **Display in new window**.
6) Click the **Content Source** dropdown arrow, and select **URL**.

b. In the lower part of the pane:



1) Click the **Select Field Type** dropdown, and select the label/object (**Contact**) you created.
2) Click the **Insert Field** dropdown arrow, and select **Insert Merge Field.**
3) Under **Functions**, select **ABS**.
4) In the large textbox: Add the correct URL, replacing the object as appropriate.

```
{!URLFOR('/lightning/cmp/j2g_fax__SendeFaxScreen', null, ['c__recordId'= Account.Id, 'c__fieldApi' = 'Account__c'])}
```

*The object (i.e., **Account**) of a previous add-button instance may display*

```
{!URLFOR('/lightning/cmp/j2g_fax__SendeFaxScreen', null, ['c__recordId'= Contact.Id, 'c__fieldApi' = 'Contact__c'])}
```

*Based on the object you're using now (i.e., **Contact**), correct the URL as shown above*

5) To save the button, click **Save** at the top of the **Custom Button or Link Edit** pane.

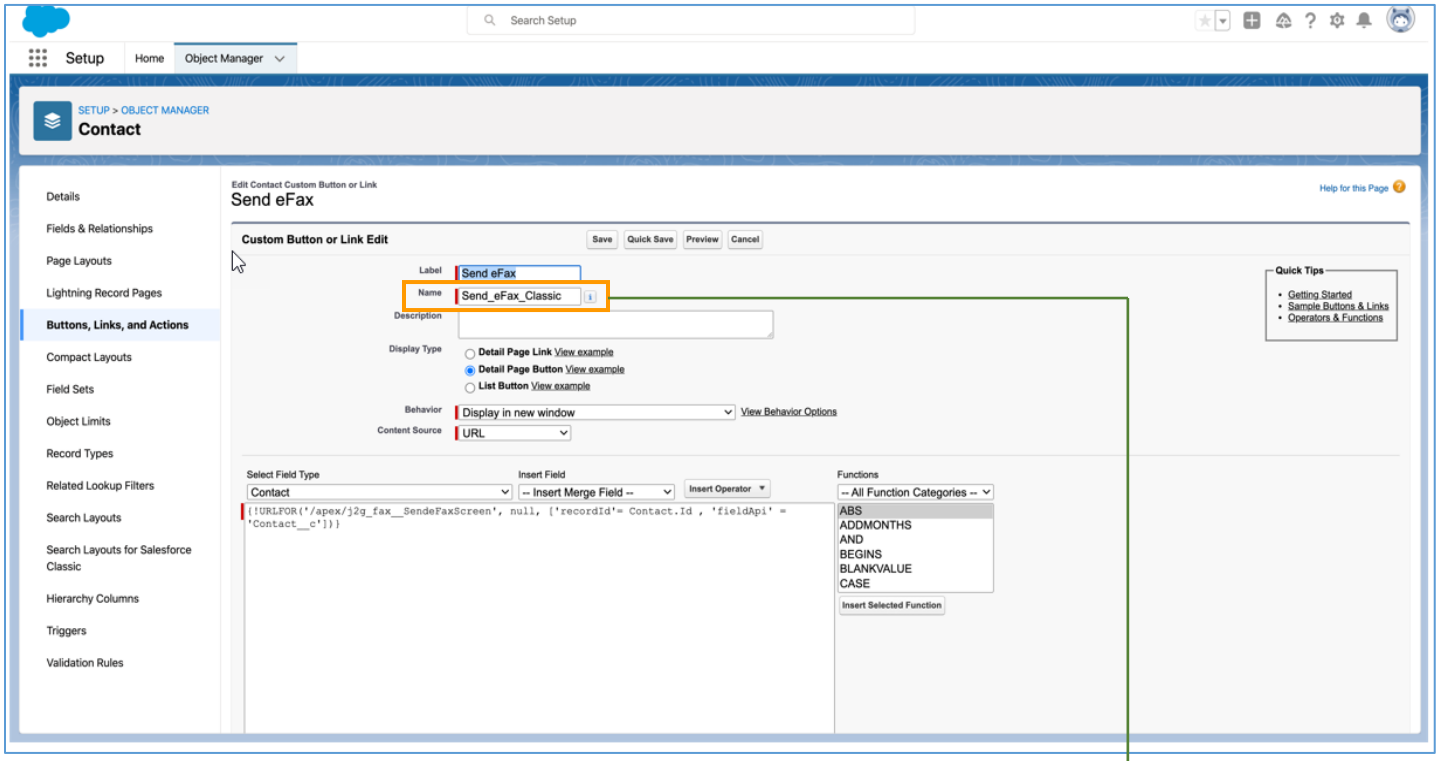


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ADMIN SETTINGS (CONT.)

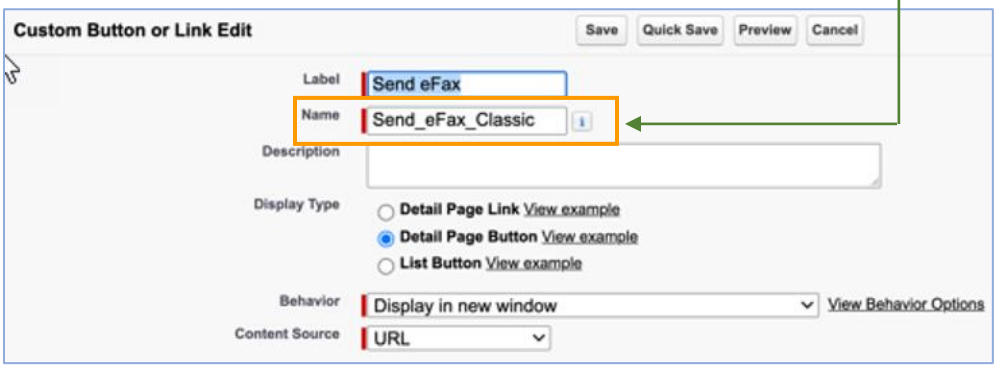
Modify/Add a Fax Button (Cont.)

- To configure a **Send eFax** button for the ***Classic* version** of *Salesforce*:



*Configuring a **Send eFax** button for **Salesforce Classic***

c. In the **Custom Button or Link Edit** pane:



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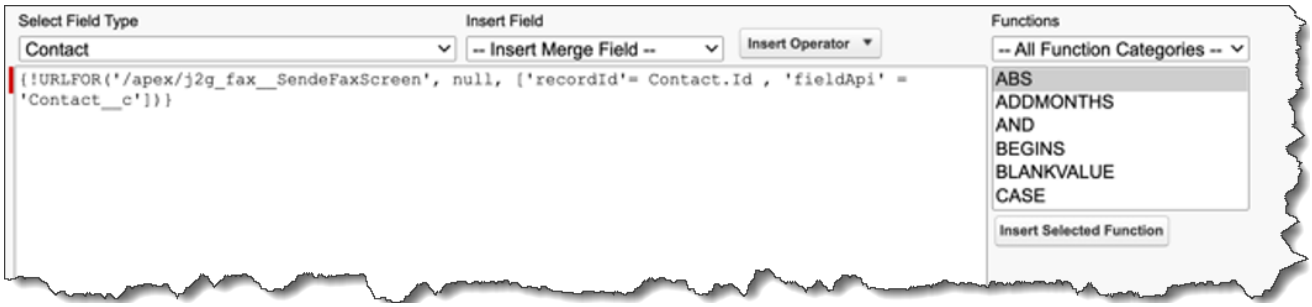
ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button (Cont.)

- To configure a **Send eFax** button for the ***Classic* version** of *Salesforce*: (Cont.)

1) Enter **Send eFax** in the **Label** field.
2) Enter **Send_eFax_Classic** in the **Name** field.
3) Enter a description. (Optional)
4) For **Display Type**, click the **Detail Page Button** radio button.
5) Click the **Behavior** drop-down arrow, and select **Display in new window**.
6) Click the **Content Source** dropdown arrow, and select **URL**.

d. In the lower part of the pane:



1) Click the **Select Field Type** dropdown, and select the label/object (**Contact**) you created.
2) Click the **Insert Field** dropdown arrow, and select **Insert Merge Field.**
3) Under **Functions**, select **ABS**.
4) In the large textbox: Add the correct URL, replacing the object as appropriate.

```
{!URLFOR('/apex/j2g_fax__SendeFaxScreen', null, ['recordId'= Account.Id , 'fieldApi' = 'Account__c'])}
```

*The object (i.e., **Account**) of a previous add-button instance may display.*

```
{!URLFOR('/apex/j2g_fax__SendeFaxScreen', null, ['recordId'= Contact.Id , 'fieldApi' = 'Contact__c'])}
```

*Based on the object you're using now (i.e., **Contact**), correct the URL as shown above*

5) To save the button, click **Save** at the top of the **Custom Button or Link Edit** pane.

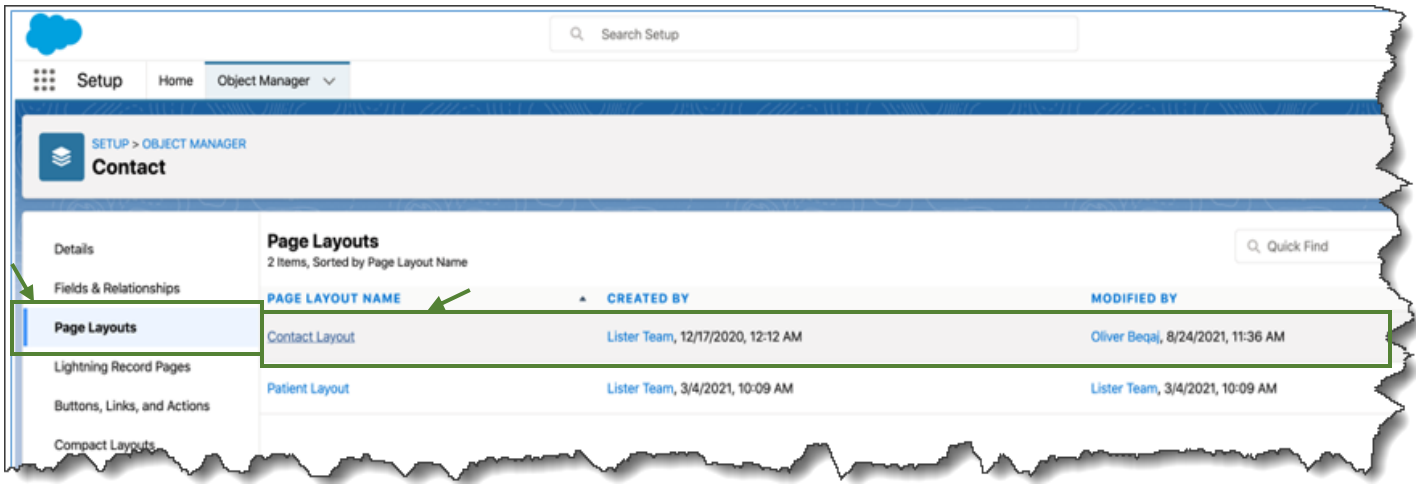


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ADMIN SETTINGS (CONT.)

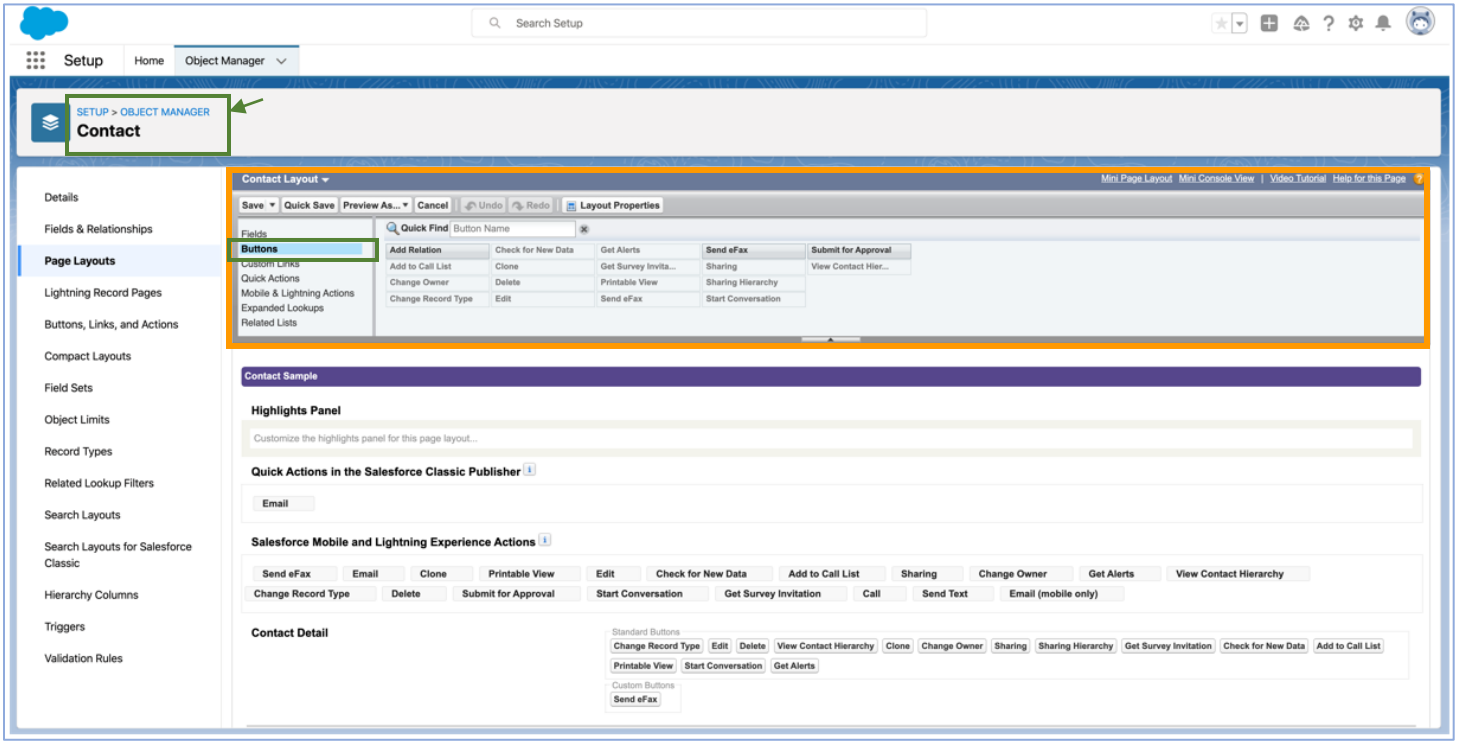
Modify/Add a Fax Button (Cont.)

8. Now, click **Page Layouts** in the left navigation pane, select **Contact Layout** on the **Page Layouts** screen…



*The object's (i.e., **Contact**) **Page Layouts** screen*

…and in the object's (i.e., **Contact**) layout pane (i.e., **Contact Layout**):



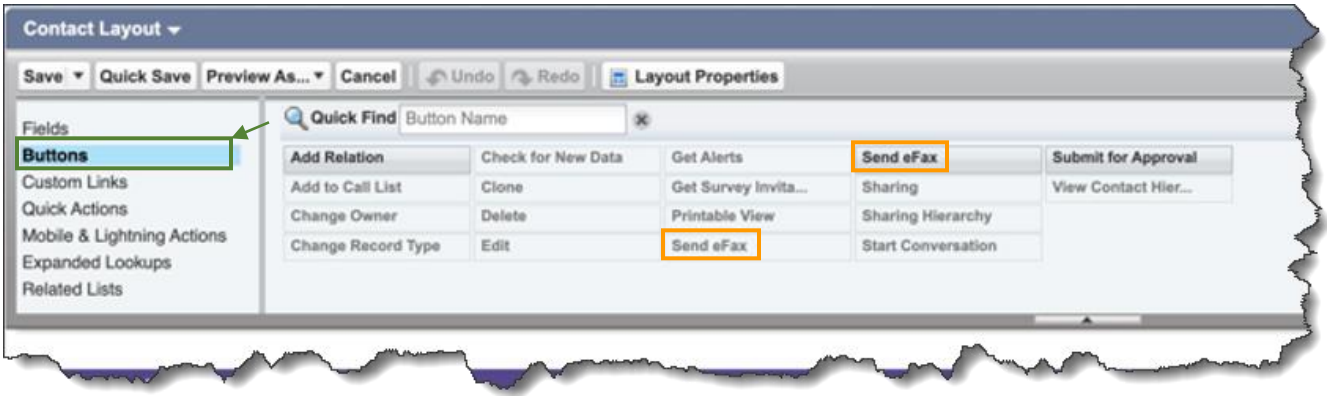
*The **Content** object screen*

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ADMIN SETTINGS (CONT.)

Modify/Add a Fax Button (Cont.)

a. Click **Buttons**—then to the right, hover over the two **Send eFax** buttons to see which one is for *Salesforce Classic* and which one is for *Salesforce Lighting***.**



*Hovering over these two buttons will show which one is the **Classic** button and which one is **Lightning***

b. Then, drag the one you want—or both (one at a time)—to the **Custom Buttons** section of the **Contact Detail** pane at the bottom of the **Contact Layout** screen.

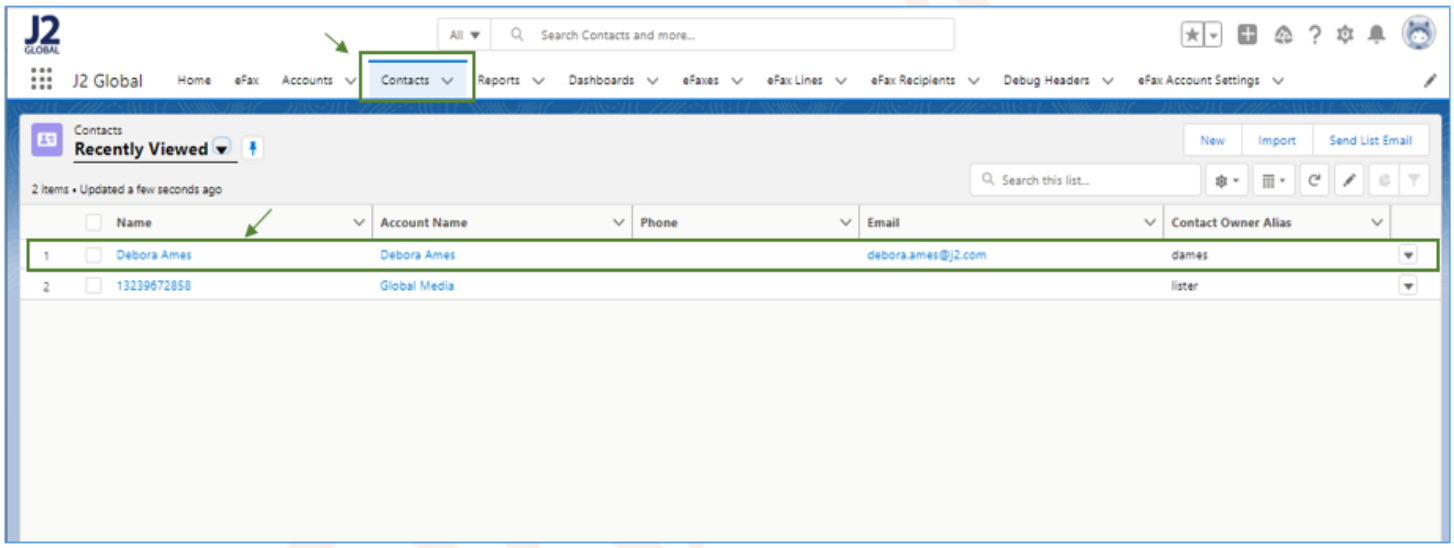


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ADMIN SETTINGS (CONT.)

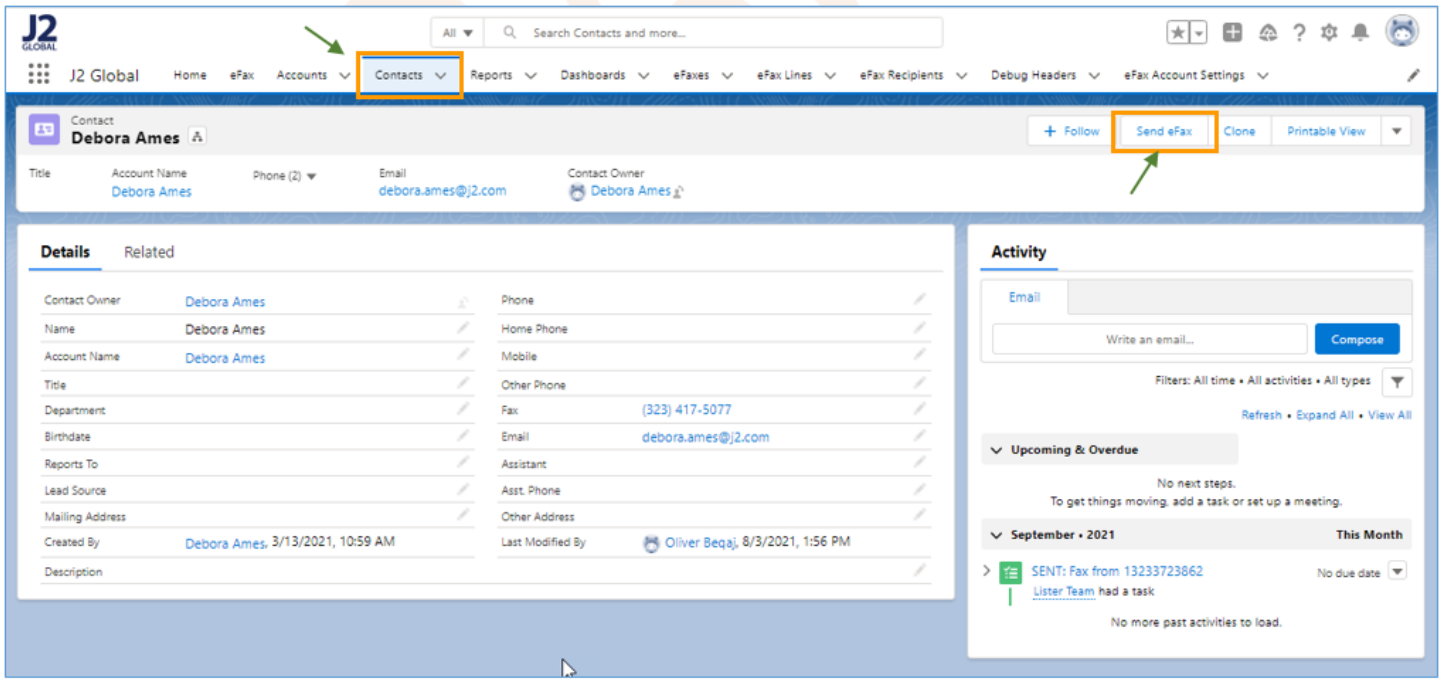
Modify/Add a Fax Button (Cont.)

9. Finally, to see where the button is: Click the **Contacts** tab (if configured), and click a contact's name.



*Select a contact's name on the **Contacts** tab (if configured)*

The **Send eFax** button appears in the top-right corner of the contact's screen.



*The **Send eFax** button is on every contact's screen*

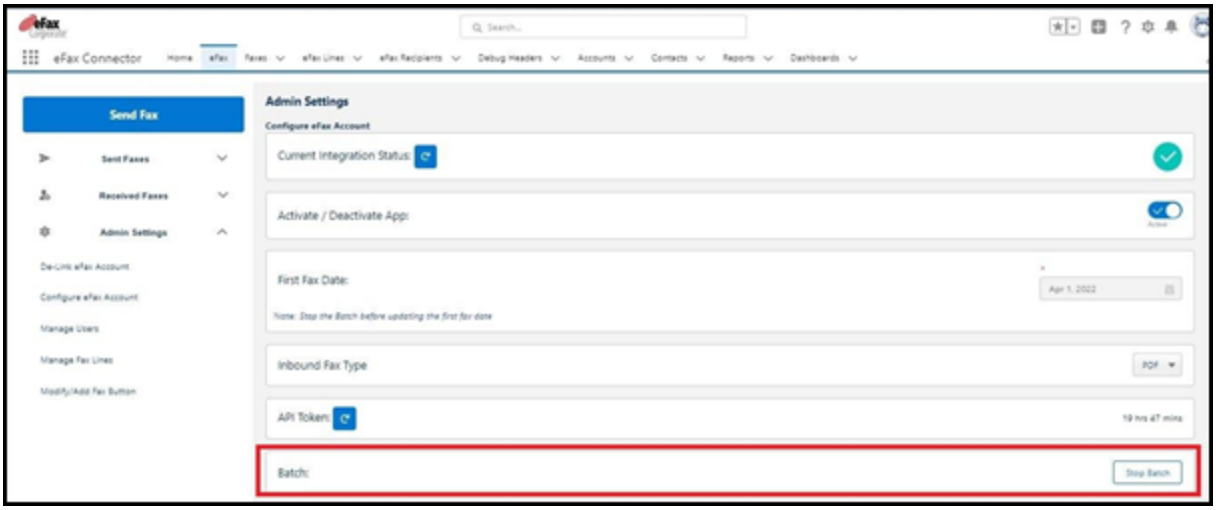
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ADDITIONAL ADMIN SETTINGS

The following additional settings are available for all application administrators.

Start and Stop the Batch

The **Admin Settings** has a new **Batch** section (**Admin Settings > Configure eFax Account > Batch**), with both **Stop Batch** and **Start Batch** buttons. The Batch process runs in the background and establishes API calls to the eFax source system, retrieves the data, and updates it into Salesforce objects.



NOTE: The **Admin Settings -> Manage Users** option and the **Admin Settings -> Manage Fax Lines** option cannot be used when the Batch is in process.

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Batch errors

In the case of any error during the run of the batch, an email is triggered to the System Administrator who started the batch. Typical error conditions and their corresponding emails are highlighted below:

ERROR 1: WHEN THE BULK BATCH ENCOUNTERS ERRORS

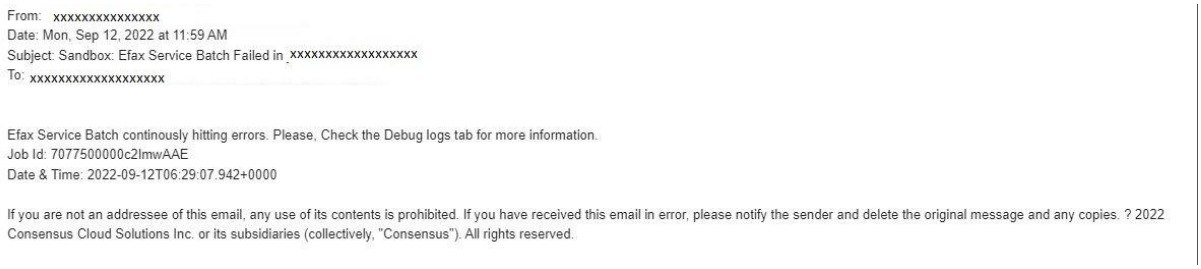

From: xxxxxxxxxxxxxxxxxxx
Date: Thu, 1 Sep 2022, 4:44 pm
Subject: Bulk Batch Failed in xxxxxxxxxxxxxxxxx
To: xxxxxxxxxxxxxxxx

Bulk Batch for retrieving eFaxes is failed to some errors. Please, Check the Debug logs tab for more information.
Job Id: 7075g00004C4twzAAB
Date & Time: 2022-09-01T11:14:08.850+0000

From	The System administrator
To	The System administrator who ran the batch.
Subject	'Bulk Batch failed in <<the org name>>
Action required	Depending on each customer's org and validations across the standard objects, they may receive these types of errors. In such cases, they should reach out to the eFax Connector Technical Support team with the error mail and the debug log.

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ERROR 2: WHEN THE EFAX SERVICE BATCH ENCOUNTERS ERRORS


From: xxxxxxxxxxxxxx
Date: Mon, Sep 12, 2022 at 11:59 AM
Subject: Sandbox: Efax Service Batch Failed in xxxxxxxxxxxxxxxxx
To: xxxxxxxxxxxxxxxxxxx

Efax Service Batch continously hitting errors. Please, Check the Debug logs tab for more information.
Job Id: 7077500000c2ImwAAE
Date & Time: 2022-09-12T06:29:07.942+0000

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From	The System administrator
To	The System administrator who ran the batch.
Subject	eFax Service Batch Failed in <<the org name>>
Action required	For such cases, when the batch runs again after the completion of one cycle, the error gets automatically resolved. In case there are more than four mails with the same content, it needs to be sent to the Technical Support team with the debug logs.

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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