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EFAX CONNECTOR ADD ON FOR HEALTHCLOUD INSTALLATION GUIDE

VERSION: 1.0

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GENERAL INFORMATION

This document describes the installation process for the eFax Connector Add On for HealthCloud application for Salesforce.

To begin, install the following base software packages for your organization:

- **eFax Connector by Consensus Cloud Solutions, Inc.** This standard version of the Connector app permits you to use eFax Corporate directly from your Salesforce instance.
- **eFax Connector Add On for HealthCloud by Consensus Cloud Solutions, Inc.** This allows you to pull faxes from the Connector to your HealthCloud organization.

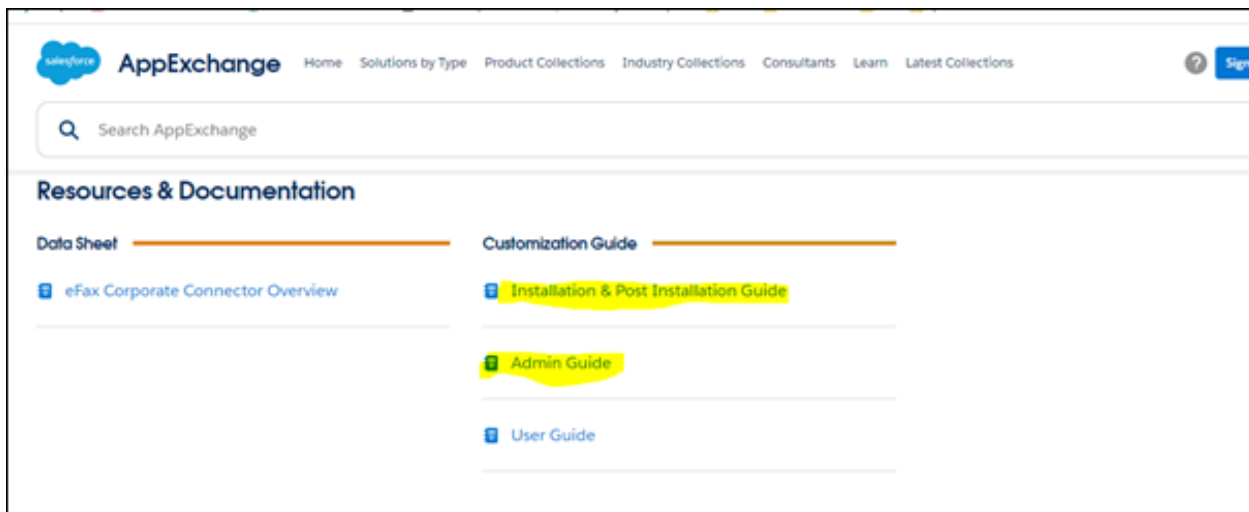
PREREQUISITES

Install the standard eFax Connector package prior to installing the Health Cloud add-on.

INSTALLATION INSTRUCTIONS – EFAX CONNECTOR

To install eFax Connector:

1. Open a web browser, navigate to <https://appexchange.salesforce.com/>, and search for the eFax Connector app.
2. Follow the instructions provided in the Installation Guide to download the app, and refer to the Admin Guide for app configuration and usage advice. You will find these Guides in **the Resources & Documentation** section of the AppExchange, as shown in the image below.

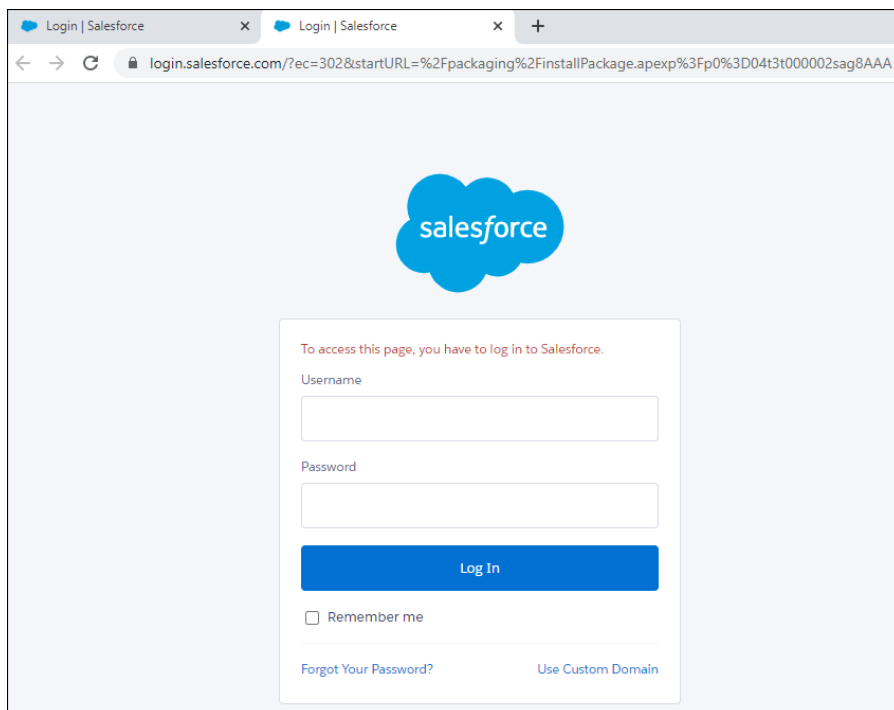


3. Return here to continue with the eFax Connector Add On for HealthCloud installation.

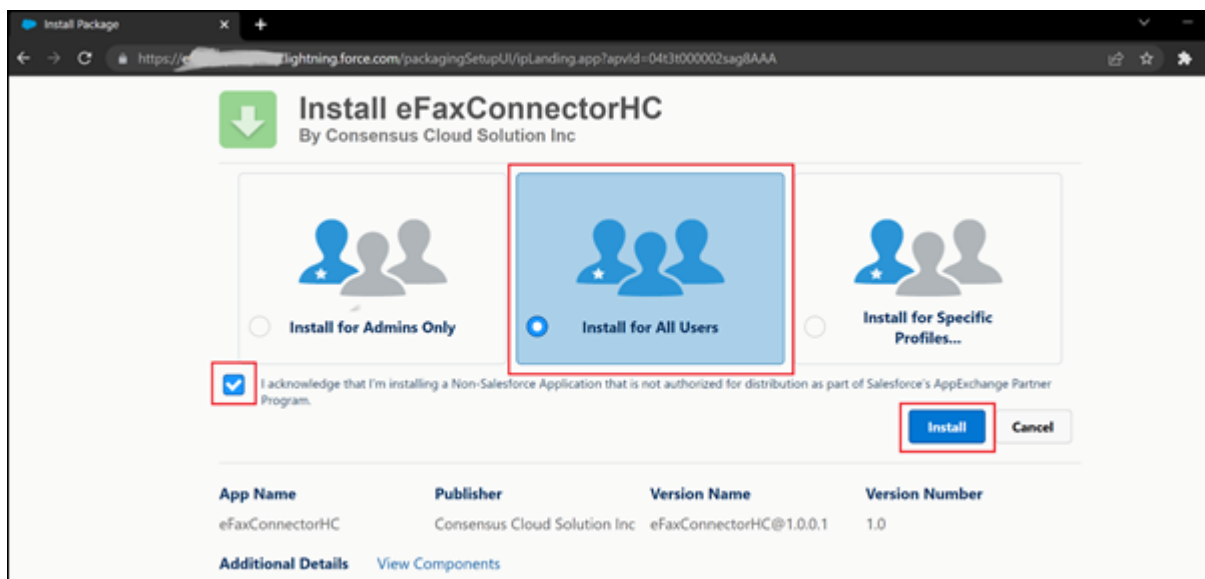
INSTALLATION INSTRUCTIONS – EFAX CONNECTOR ADD ON FOR HEALTHCLOUD PACKAGE

Follow these steps to install the eFax Connector Add On for HealthCloud package:

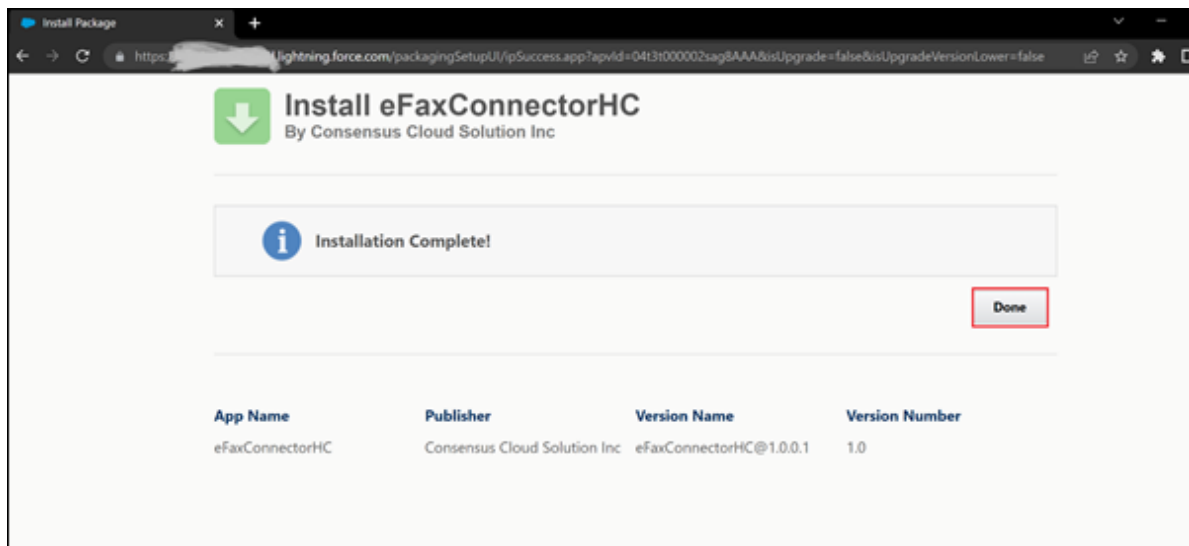
1. Open a web browser and navigate to [this URL](#).
2. Login with the credentials of your organization.



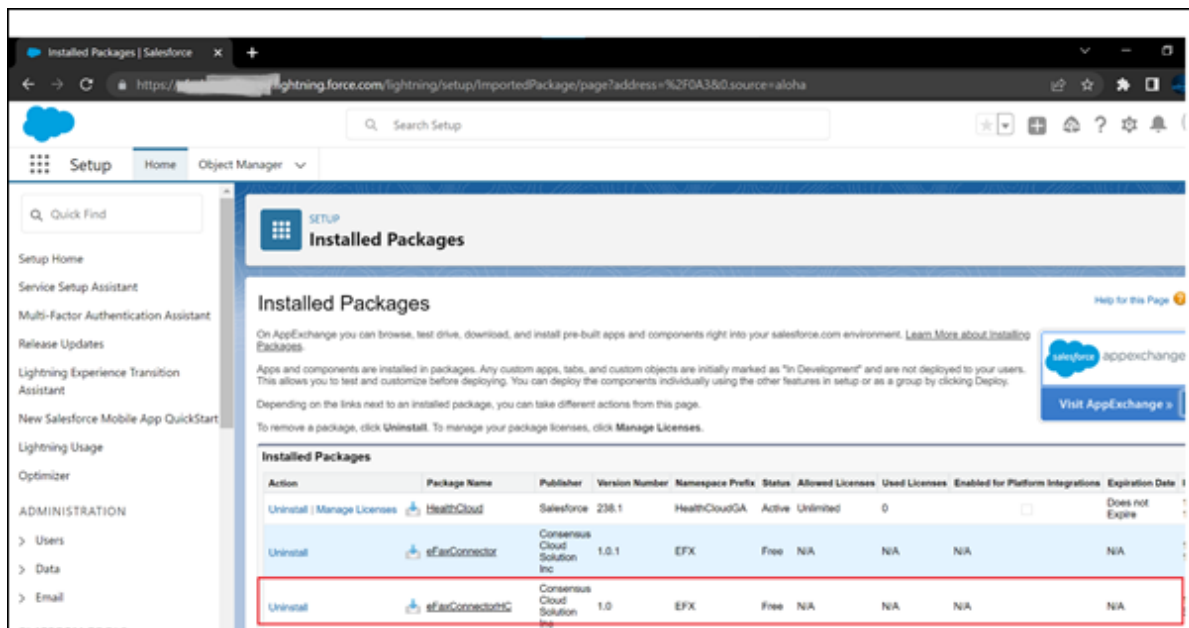
3. Select **Install for All Users**, check the acknowledgement box, and click **Install**.



4. Click **Done**.



5. Verify the Package appears in the **Installed Packages** tab.

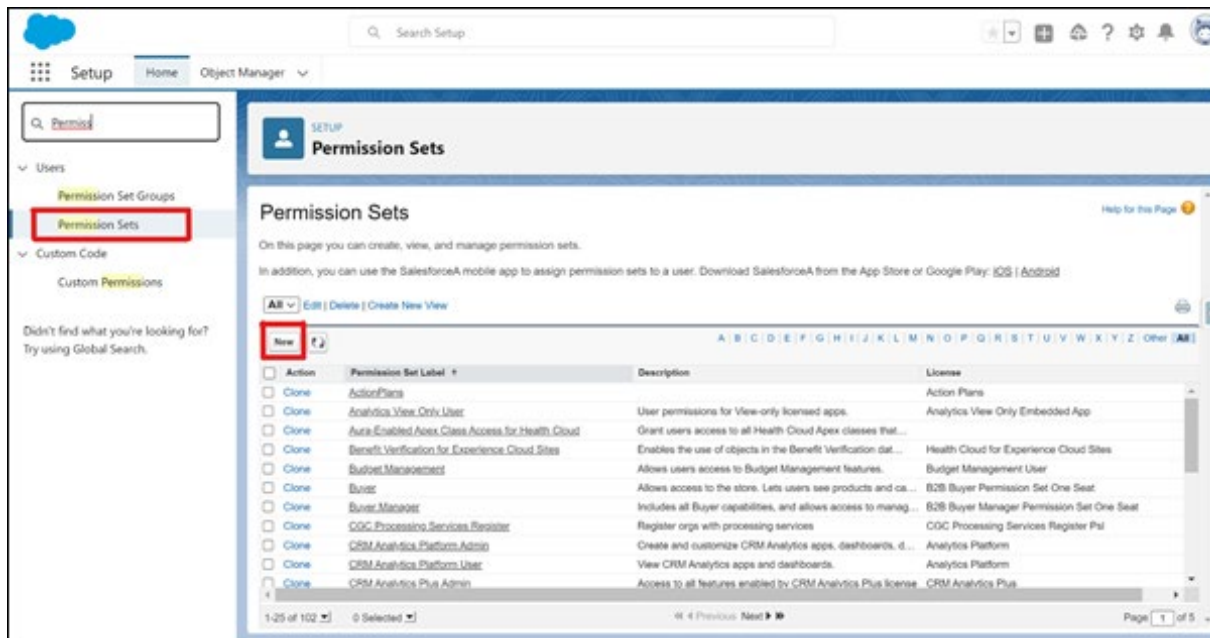


POST INSTALLATION CONFIGURATION

Now that you have the eFax Connector for HealthCloud app installed, you need to configure the permission set to enable users to engage with the app.

Follow these steps to configure the eFax Connector for HealthCloud permission set:

1. Navigate to the Setup page and search for Permission Sets.
2. When the Permission Sets page opens, click **New**.



3. In the **Enter Permission Set Information** pane, enter the following details:
 - Label: **eFax HealthCare**
 - API Name: **eFax_HealthCare**
 - Session Activation Required: Leave this unchecked
 - License: **Health Cloud Platform**

- Click **Save** to create the permission set.

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer

ADMINISTRATION

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles

SETUP
Permission Sets

Save Cancel

Enter permission set information

Label **eFax HealthCare**

API Name **eFax_HealthCare**

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License **Health Cloud Platform**

Save Cancel

- Continue by selecting **Object Settings** in the list of apps that appears below the saved permission set.

Setup Home Object Manager

Search Setup

Setup
Permission Sets

Permission Set Overview

Description

License

Session Activation Required ☐

Last Modified By [sally.kartha](#) 10/27/2022, 12:31 AM

API Name eFax_HealthCare

Namespace Prefix

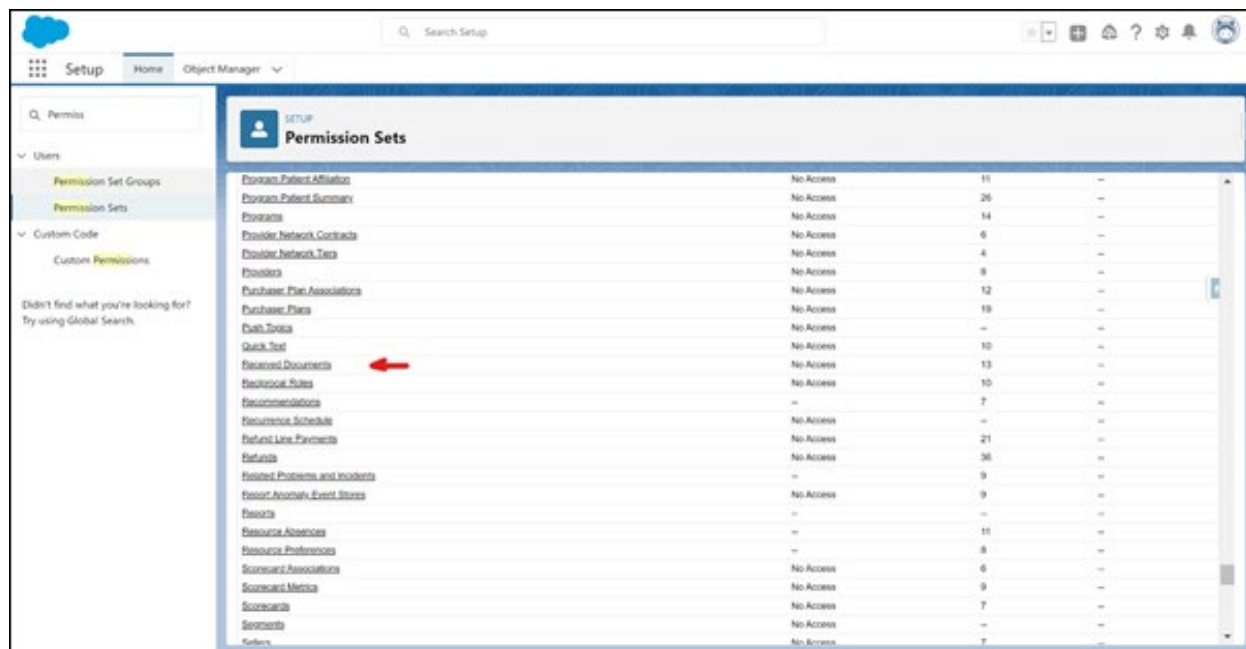
Created By [sally.kartha](#) 10/27/2022, 12:31 AM

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to exclude Apex classes
- Visualforce Page Access**
Permissions to execute visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

6. Search for the **Received Documents** object and select it.



7. Enable the checkbox for **Read, Create, Edit, Delete** in the **Object Permission** section, and then enable the checkboxes for the following fields in the **Field Permissions** section:

Field Name	Read Access	Edit Access
Direction	TRUE	TRUE
Document Number	TRUE	TRUE
eFax	TRUE	TRUE
Priority	TRUE	TRUE
Source	TRUE	TRUE
Status	TRUE	TRUE

The following image shows these selections made in the **Received Documents** page.

Received Documents [Save] [Cancel]

Tab Settings

Available	Visible
☒	☒ (3)

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒

Field Permissions

Field Name	Read Access	Edit Access
Active	☐	☐
Created By	☐	☐
Created Date	☐	☐
Direction	☒	☒
Document Number	☒	☒
eFax	☒	☒
Last Modified By	☐	☐
Last Modified Date	☐	☐
Name	☐	☐
Owner Name	☐	☐
Priority	☒	☒
Source	☒	☒
Status	☐	☐

8. Click **Save** to continue.

9. In the **eFax HealthCare** screen, look for the **Systems** pane and click **System Permissions**.

Permission Set Overview

Description: Health Cloud Platform

License: [Icon]

Session Activation Required: ☐

Last Modified By: [sally.kartha](#) 10/31/2022, 11:57 PM

API Name: eFax_HealthCare

Namespace Prefix:

Created By: [sally.kartha](#) 10/31/2022, 11:42 PM

Apps

Object Settings
Permissions to access objects and fields, and settings such as tab availability

Flow Access
Permissions to execute Flows

Custom Metadata Types
Permissions to access custom metadata types

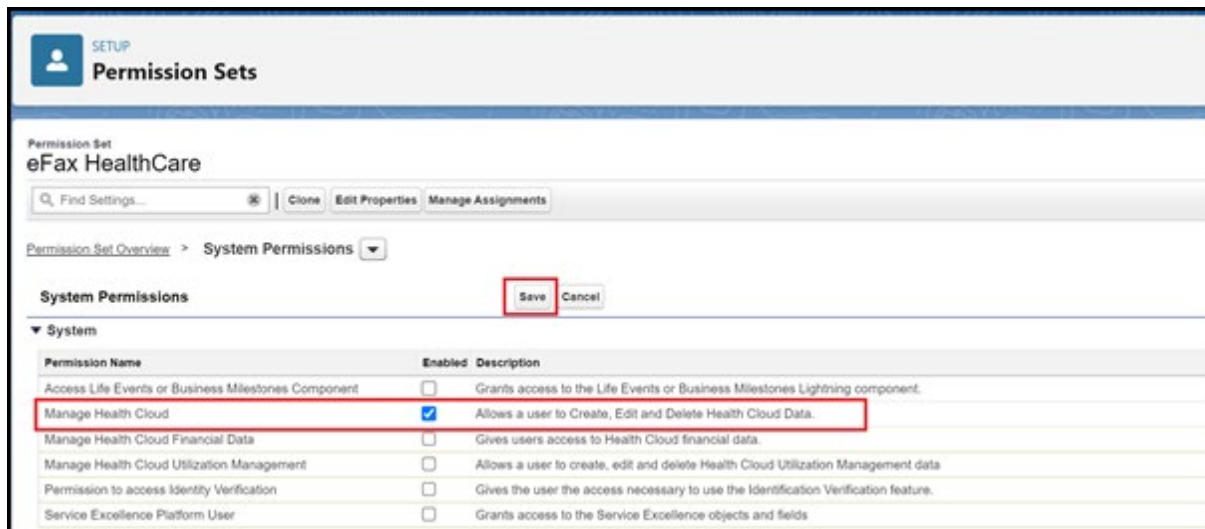
Custom Setting Definitions
Permissions to access custom settings

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

10. Using the checkbox, enable **Manage Health Cloud** and then click **Save**.



You are now ready to assign the eFax HealthCare permission set to both Admin and non-admin users of the eFax Connector application, as shown in the following image. Be sure to save any changes you make.

