

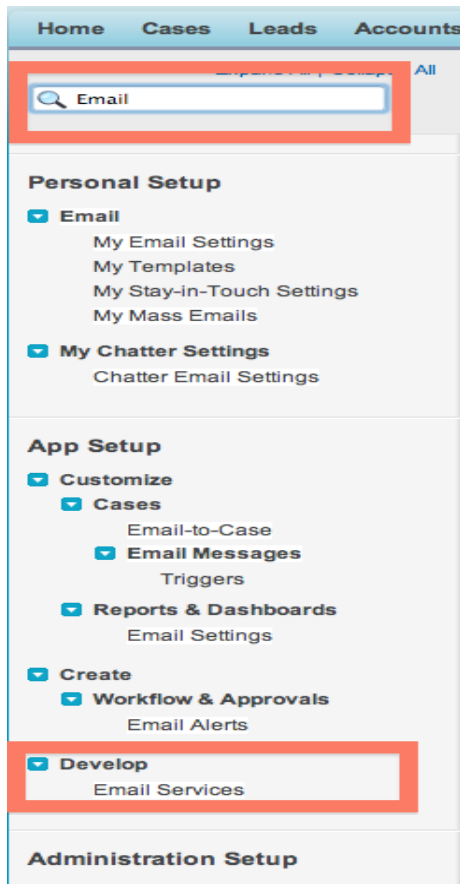
Easy Opt searches the “Subject” line of inbound emails for either of the following words: Unsubscribe, Unsubscribed, Remove, Delete, Insubscribe, Unsub, Opt-Out or Op Out . If one of these words is found, Easy Opt will process this request by locating the “From” email address; once found Easy Opt will then , set the value of the Email Opt Out field (HasOptedOutOfEmail) to True.

For Do Not Call processing, Easy Opt requires the exact phrase “Do Not Call” to appear on the Subject line.

Easy Opt Post Installation Setup

Setup Email Service

1. Go to Setup -> App Setup -> Develop -> Email Services



2. Click on ‘New Email Service’
3. Use the screenshot below to fill in the form:

Enter the Email Service Name: **EasyOpt**

Open Apex class and select: **UnsubscribeEmailHandler**

Leave “Accept Attachments” as None

Check Active: ✓

Don't modify any of the remaining 7 fields.

4. Click on “Save and New Email Address”

The screenshot displays the Salesforce configuration interface for an email service. At the top, there are three buttons: 'Save', 'Save and New Email Address', and 'Cancel'. The main section is titled 'Email Service Information' and contains the following fields:

- Email Service Name:** EasyOpt
- Apex Class:** UnsubscribeEmailHandler
- Accept Attachments:** None
- Advanced Email Security Settings:** [i](#)
- Accept Email From:** (Empty text area) [i](#)
- Convert Text Attachments to Binary Attachments:** [i](#) **Active**

The 'Failure Response Settings' section is titled 'Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.' and includes the following actions:

- 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:** [i](#)
- Route Error Emails to This Email Address:** (Empty text field)

At the bottom of the form, there are three buttons: 'Save', 'Save and New Email Address', and 'Cancel'.

5. As screenshot below all fields will be auto populated but you need to empty the field “Accept Email From”, ensuring that it is blank when you click on Save.
6. Click on “Save” to generate your Email Service Email Address.
7. In the Email Address field, enter the easyopt.
8. Check Active: ✓
9. Context User is your System Admin User

Email Service Address

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

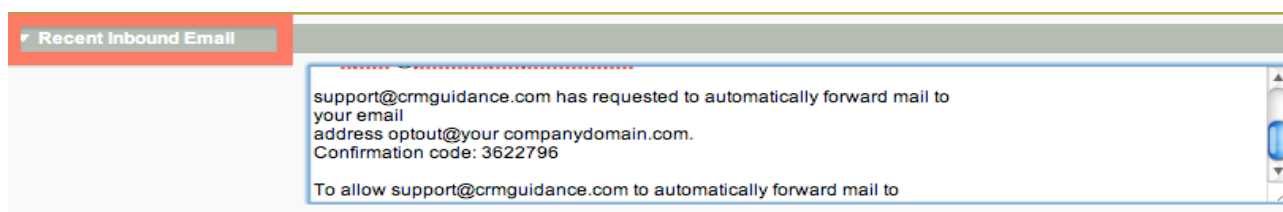
Email Address Information

Email address: @m-ss0e4fuk1yzjmdxwwwo540nx1fq1xfiucn4ti5xxi8rbjqsxo.e-bkcamai.e.apex.salesforce.com
 Active:
 Context User:
 Accept Email From:

Email Addresses

Action	Email Address
View Edit	easyopt@m-ss0e4fuk1yzjmdxwwwo540nx1fq1xfiucn4ti5xxi8rbjqsxo.e-bkcamai.e.apex.salesforce.com

- Go to the “Email Address” section: the long string that starts with “easyopt@” is your Easy Opt Email Service Address. If you are NOT using a custom Unsubscribe Email Alias, copy this address, because you’ll need paste it into the Easy Opt Setting. If you are using an Unsubscribe Email Alias, forward the to your Easy Opt Email Service Address to your Email Administrator.
- If your organization is using an unsubscribe Alias like [unsubscribe@yourcompany.com](#) or [optout@yourcompany](#) your Email Administrator will need your new your Easy Opt Email Service Address so that he can forward inbound messages sent to [unsubscribe@yourcompany.com](#) or [optout@yourcompany](#) to EasyOpt.
- If your organization is using GMAIL or Yahoo or any other hosting service that requires email verification when you set up your forwarding service, you will have an extra step. Once you generate your Verification Code, go to the “Easy Opt Settings” tab. Page down to the “Recent Inbound Email” section of the page layout. You will find your Verification Code located in that text area.



Next, go to “Easy Opt Settings

Go to your upper right navigation of your Salesforce Org, click on the drop down menu, then select the ‘Easy Opt’ App, then go to your Tabs and click on the ‘Easy Opt’ tab.

How to configure the Easy Opt Settings.

1. Select Leads & Contacts to enable Opt Out and Do Not Call updates on Leads and Contacts. This is important, because of the potential for duplicate email address appearing throughout your Salesforce org. Easy Opt will update every occurrence of an Email Address whether its’ found in Contacts and or Leads. If you don’t select Lead or Contact for Unsubscribe or Do Not Call, Easy Opt will not update records found in these areas of your Salesforce Org.

Do Not Call Configuration

Completing the rest of this form:

To: You have two options for inserting data into the “To” field:

1. If your organization has an Unsubscribe Email Alias like optout@yourcompanyname.com, insert it here.
2. If you are not using an Unsubscribe Email Alias, paste (from line 10 above) your Easy Opt Email Service Address here.

Subject

This is the value that Easy Opt requires in order to execute inbound requests. Easy Opt is looking for any of the following values in the email recipient/responders Subject line to your Unsubscribe requests: Unsubscribe, Unsubscribe Remove, Delete, Insubscribe, Unsub, Opt-Out, Opt Out . Insert your choice of either of these values. Easy Opt is looking for “Do Not Call” in the Subject line in order to process Do Not Call requests.

Display Text

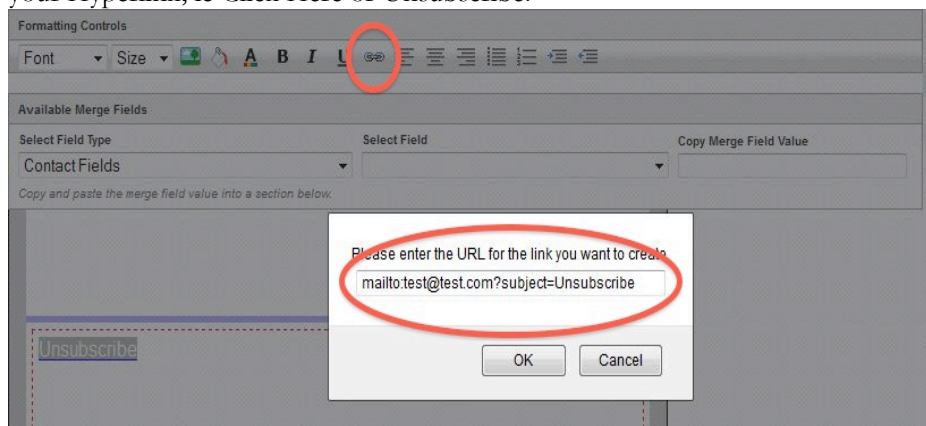
This is the message used to guide your recipient to enter the correct information for the email response.

Inserting Your HTML Link Into Your Email Templates

CUSTOM Salesforce Template: Copy and paste the value that appears here into your HTML Emails and or to Salesforce’s CUSTOM Email Templates.

Text Emails you will explicitly direct your recipients to Insert Unsubscribe to their Subject field; and you will explicitly ask your recipients to copy and paste your full Easy Opt Email Service to the “To” field in their Email Application.

HTML Templates (with Letterhead): Whether you’re creating a new HTML (with letterhead) Template or editing an existing one, while in “Edit” mode, type the phrase that you want to appear as your Hyperlink; ie Click Here or Unsubscribe.



- Next, highlight your phrase
- Go to the Toolbar
- Click on the chain link (circled above)

- Remove the “http://”
- Insert your Opt Out email address, either your Alias: unsubscribe@yourcompany .com, or our Easy Opt Email Address as follows <mailto:unsubscribe@yourcompany.com?subject=Unsubscribe> or your Easy Opt Email address if you are not using an Email Alias.
<mailto:yourneweasyoptemailoptoutaddresslocatedonesettingstab?subject=Unsubscribe>
- Click on “OK”
- Click on “ Save”
- Done

Opt-Out / Do Not Call Confirmation

Select this checkbox if you would like Easy Opt to automatically respond to successful Opt Out and Do Not Call Submissions.

A successful Opt Out or Do Not Call submission is defined as;

- Easy Opt receives the Inbound Message containing Unsubscribe or Do Not Call in the subject line.
- Easy Opt processes the request and locates one or more occurrences of the “From” Email Address.
- Easy Opt updates each located record with Email Opt Out or Do Not Call = True

Successful Submission Subject

This is the Email Subject that will appear in the return response on successful Opt Out and Do Not Call submissions.

Successful Submission Message

This is the email message that will appear in your return response to successful Opt Out and Do Not Call submissions.

Note: Even if Easy Opt identifies multiple records in Contacts and or Leads, the recipient will only receive one response per confirmation response.

Sample Opt Out Verbiage

Sample 1: Text and HTML Templates (with Letterhead):

If you do not wish to receive these emails in the future, you can easily unsubscribe from our mailing lists by sending an email to unsubscribe@mycompanyname.com with the word "UNSUBSCRIBE" in your “Subject” line.

Sample 2: CUSTOM Salesforce Template

Please note: If you do not wish to receive further emails from us, please click on the link below, and SEND. [Click Here](#)

Sample 3: CUSTOM Salesforce Template

Click here to Unsubscribe: <mailto:easyopt@m-ss0e4fuk1yzjmdxwvwo540nx1fq1xfiucn4ti5xxi8rbjqsxo.e-bkcamai.e.apex.salesforce.com?subject=Unsubscribe>>Click Here

Easy Opt Configuration Tips

- NOTE: Email Service addresses that you create in your Sandbox cannot be copied to your production organization. You must recreate your Email Service in production in order for Easy Opt to function correctly.
- For Enterprise, Force.com and Unlimited Editions**, please confirm Do Not Email and Do Not Call Field Level Security is set to visible for Contacts and Leads:
 - Go to:** Setup>App Setup>>Leads>>Fields>>Email Opt Out>>Set Field-Level Security>> Click on “Visible”, or set visibility according to your orgs requirements

Set Field-Level Security
Email Opt Out

Save Cancel

Field Label	Email Opt Out
Data Type	Checkbox

Field-Level Security for Profile	Visible
Contract Manager	<input type="checkbox"/>
Custom: Marketing Profile	<input type="checkbox"/>
Custom: Sales Profile	<input type="checkbox"/>
Custom: Support Profile	<input type="checkbox"/>
Customer Portal Manager Custom	<input type="checkbox"/>
Customer Portal Manager Standard	<input type="checkbox"/>

Set Field-Level Security
Email Opt Out

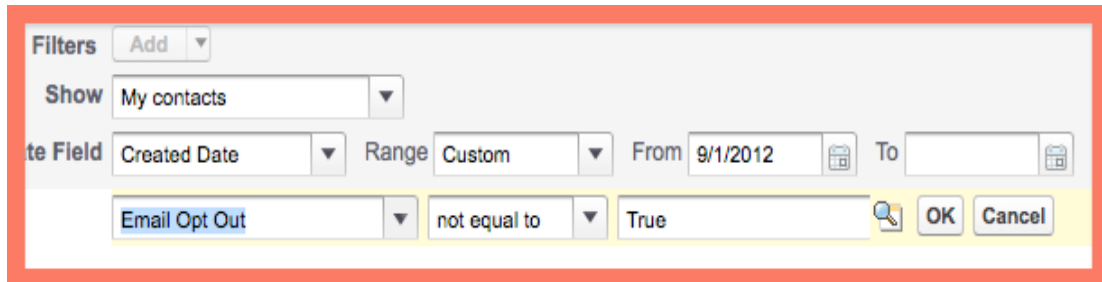
Save Cancel

Field Label	Email Opt Out
Data Type	Checkbox

Field-Level Security for Profile	Visible
Contract Manager	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>

- Group Edition to Unlimited Edition: Make sure “Do Not Email” has been added to your page layouts on Leads and Contacts.

- Modify your Mailing Lists Reports by adding a filter that excludes Contact and or Lead records where “Do Not Email” = True. Your filters should look like this:



The screenshot shows a filter configuration interface with the following elements:

- Filters** section with an **Add** button.
- Show** dropdown menu set to **My contacts**.
- Select Field** dropdown menu set to **Created Date**.
- Range** dropdown menu set to **Custom**.
- From** date field set to **9/1/2012**.
- To** date field (empty).
- Filter Rule** section with a dropdown set to **Email Opt Out**, a comparison operator dropdown set to **not equal to**, and a value field set to **True**.
- OK** and **Cancel** buttons.