



# ADMINISTRATOR GUIDE

VERSION 1.0

## Abstract

This document provides a brief description about the prerequisites, installation, settings and working of Stay In Touch (Contact Update Request).

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## Stay In Touch (Contact Update Request) Overview

Stay In Touch is an application that allows you to quickly and easily request updated contact information from your contacts and automatically update their contact information by one click.

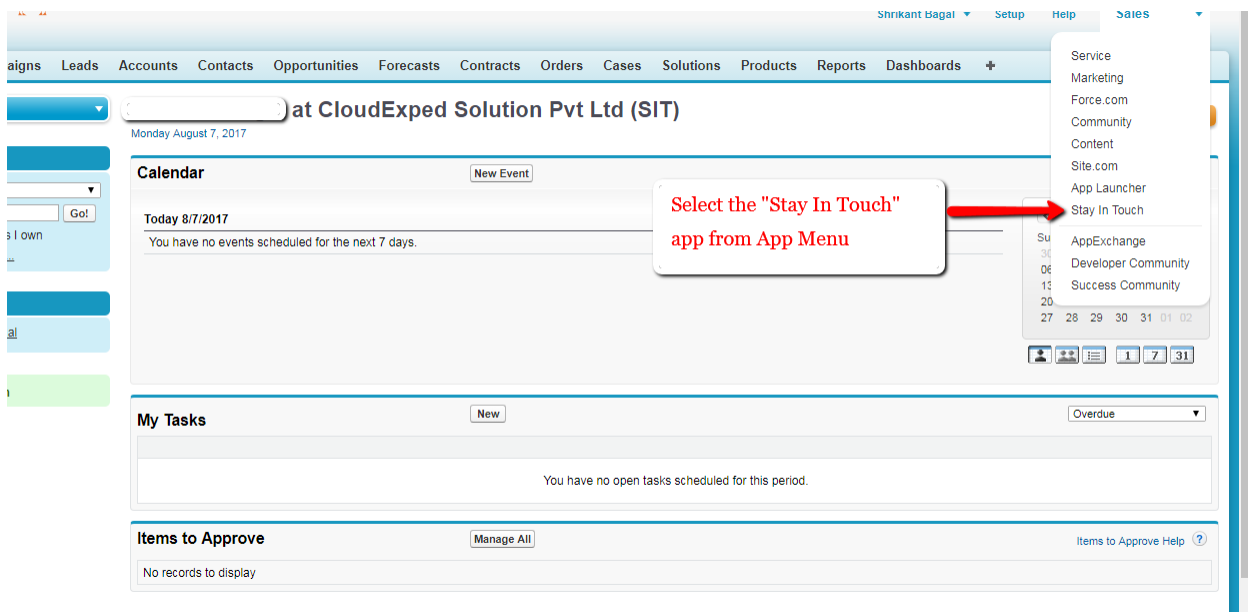
## Stay In Touch Features

- Customize the form with your contact standard fields.
- Automatically prefill the form with data pulled directly from your Salesforce database.
- Automatically submit the updated data back to Salesforce.
- Eliminate the need for constituents to enter info you already have, and eliminate the need for data re-entry.

## Configure the Stay In Touch

**NOTE:** THE FOLLOWING STEPS ARE CONSIDERING AS YOU HAVE INSTALLED THE “STAY IN TOUCH” PACKAGE FROM APPEXCHANGE.

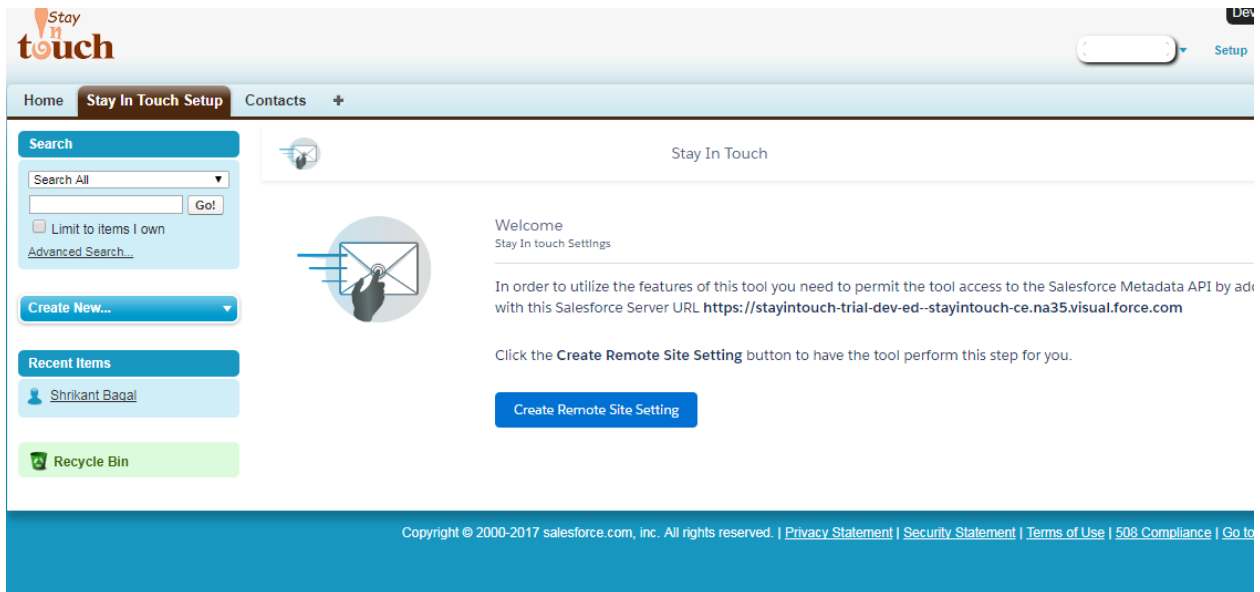
### STEP 1: Select the “Stay In Touch” application from Salesforce App Menu Dropdown list



The screenshot shows the Salesforce user interface for a user named Shrikant Bagal. The top navigation bar includes 'Setup', 'Help', and 'Sales'. Below this is a horizontal menu with various Salesforce objects: 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Contracts', 'Orders', 'Cases', 'Solutions', 'Products', 'Reports', and 'Dashboards'. A dropdown menu is open, displaying a list of applications and services. The 'Stay In Touch' application is highlighted in blue. A red callout box with the text 'Select the "Stay In Touch" app from App Menu' and a red arrow points to the 'Stay In Touch' option in the dropdown list. The main content area shows a calendar for Monday, August 7, 2017, with a message 'You have no events scheduled for the next 7 days.' Below the calendar are sections for 'My Tasks' (with a 'New' button and 'Overdue' filter) and 'Items to Approve' (with a 'Manage All' button and 'Items to Approve Help' link). The 'My Tasks' section shows 'You have no open tasks scheduled for this period.' and the 'Items to Approve' section shows 'No records to display'.

## STEP 2: Create “Create Remote site setting”

**NOTE:** THIS WINDOW WILL OPEN ONLY FOR FIRST TIME, IT WILL CREATE THE REMOTE SITE SETTING RECORD SO IT WILL ACCESS THE EMAIL LIMITS



The screenshot displays the 'Stay in touch' application interface. The top navigation bar includes 'Home', 'Stay In Touch Setup', and 'Contacts'. The main content area is titled 'Stay In touch' and features a 'Welcome' message. The message states: 'In order to utilize the features of this tool you need to permit the tool access to the Salesforce Metadata API by add with this Salesforce Server URL <https://stayintouch-trial-dev-ed--stayintouch-ce.na35.visual.force.com>'. Below this, it instructs the user to 'Click the **Create Remote Site Setting** button to have the tool perform this step for you.' A prominent blue button labeled 'Create Remote Site Setting' is visible. The left sidebar contains a search bar, a 'Create New...' button, and a 'Recycle Bin' link. The footer contains copyright information: 'Copyright © 2000-2017 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#) | [508 Compliance](#) | [Go to](#)'.

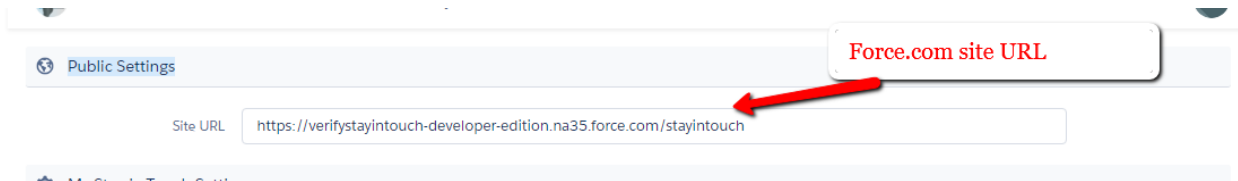
Once you click on “Create Remote Site Setting”, application will create the remote site setting for you and redirect you to setup page.

## STEP 3: Setup the Stay In Touch

This step has following sections:

### 3.1 Public Settings

In this section you have to specify the Force.com site URL



Public Settings

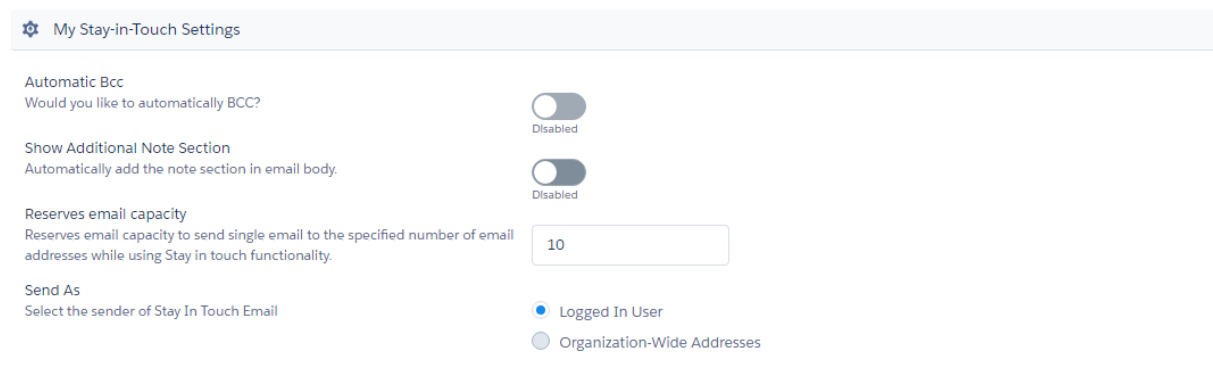
Force.com site URL

Site URL

### 3.2 My Stay-in-Touch Settings

In this section you can configure the

- BCC – Application will add user’s email address in bcc automatically
- Show Additional Note Section - it will show the addition section on Contact Update page so that contact owner can add some additional note for your organization
- Reserves email capacity- Reserves email capacity to send single email to the specified number of email addresses while using Stay in touch functionality
- Send As - Select the sender of Stay In Touch Email



My Stay-in-Touch Settings

Automatic Bcc  
Would you like to automatically BCC?  Disabled

Show Additional Note Section  
Automatically add the note section in email body.  Disabled

Reserves email capacity  
Reserves email capacity to send single email to the specified number of email addresses while using Stay in touch functionality.

Send As  
Select the sender of Stay In Touch Email

Logged In User

Organization-Wide Addresses

### 3.3 Email Template Settings

In this section you can specify the Default email template while sending the Contact update request for your contact owner [ User can select the different email template while sending contact update request if user want ]

✉ Email Template Settings

Email Folder

StayInTouch
 ▾

Template

Staying in touch
 ▾
Preview

### 3.4 Field Configuration

In this section you can configure the fields which will available for contact to update.

⌵ Field Configuration

Quick Find

Contact Des...
Other City
Other Coun...
Other Phone
Other State...
Other Street
Other Zip/P...
Reports To ID

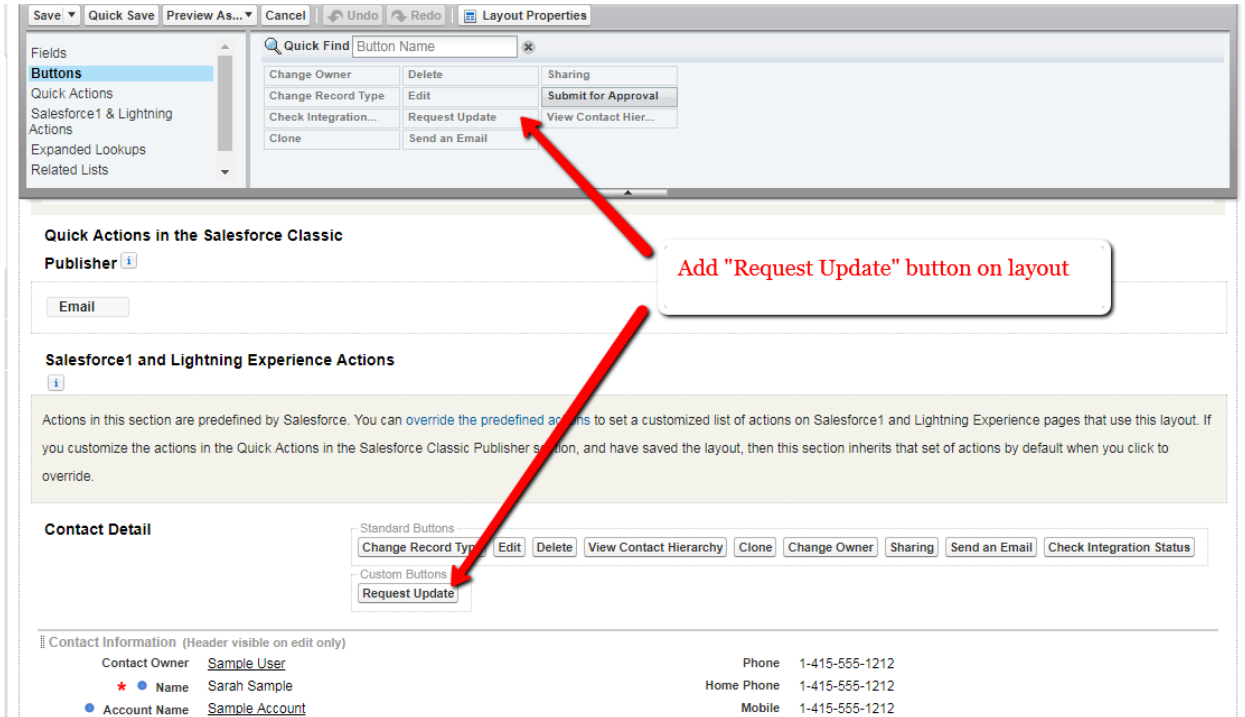
Drag and drop the fields you want show on "Stay In Touch" page

Account	Assistant's ...	Asst. Phone	Birthdate	Business Fax	Business Ph...	Department	Email	First Name	Home Phone
Last Name	Mailing City	Mailing Cou...	Mailing Stat...	Mailing Street	Mailing Zip/...	Mobile Pho...	Salutation	Title	



## STEP 4: Add “Request Update” button on Contact Layout

Select the contact layout on which you would like to send the contact update request and add “Request Update” button on layout.



The screenshot shows the Salesforce Layout Properties editor. The 'Buttons' section is expanded, and the 'Request Update' button is selected. A red arrow points from the 'Request Update' button in the 'Buttons' list to the 'Request Update' button in the 'Custom Buttons' section of the 'Contact Detail' layout. A text box with the text 'Add "Request Update" button on layout' is positioned above the arrow.

**Buttons**

Change Owner	Delete	Sharing
Change Record Type	Edit	Submit for Approval
Check Integration...	Request Update	View Contact Hier...
Clone	Send an Email	

**Quick Actions in the Salesforce Classic**

**Publisher**

Email

**Salesforce1 and Lightning Experience Actions**

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Contact Detail**

Standard Buttons

Change Record Type Edit Delete View Contact Hierarchy Clone Change Owner Sharing Send an Email Check Integration Status

Custom Buttons

Request Update

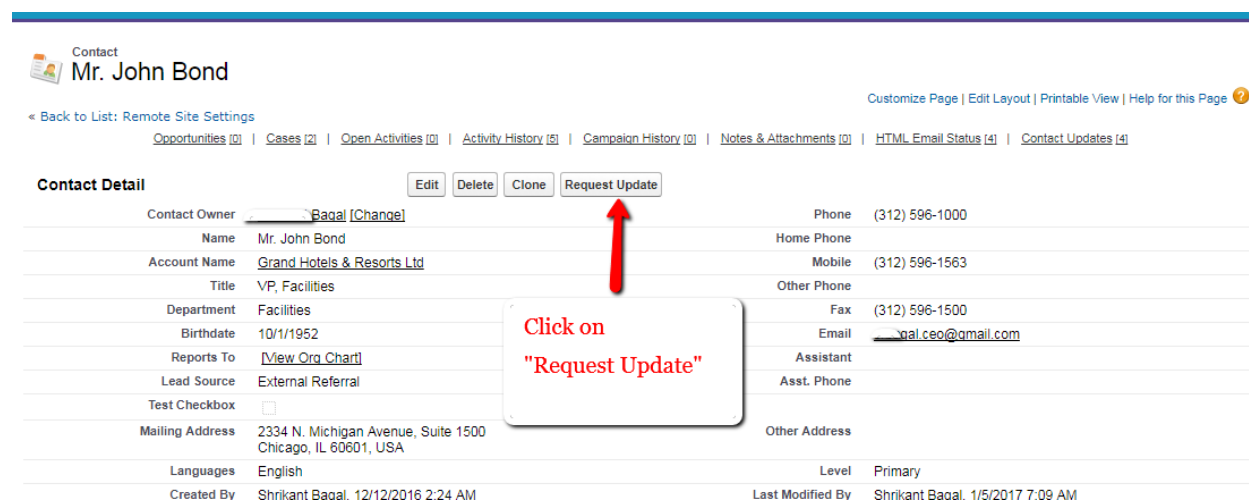
|| Contact Information (Header visible on edit only)

Contact Owner	Sample User	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Account	Mobile	1-415-555-1212

## STEP 5: Sent Contact Update Request

The following steps will explain you, How to send the request for contact detail update to any contact record.

5.1 Go to specific Contact record for which you would like to send the update request and click on "Request Update" button



Contact  
Mr. John Bond

Customize Page | Edit Layout | Printable View | Help for this Page ?

« Back to List: Remote Site Settings

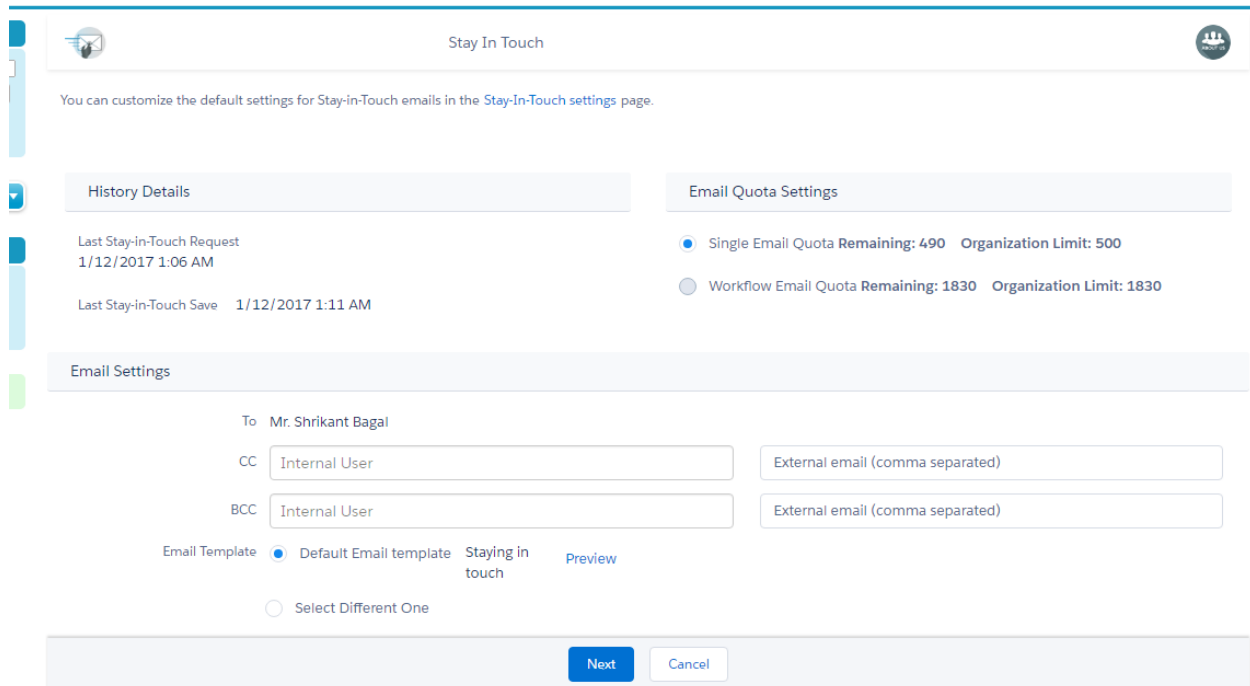
[Opportunities \(0\)](#) | [Cases \(2\)](#) | [Open Activities \(0\)](#) | [Activity History \(5\)](#) | [Campaign History \(0\)](#) | [Notes & Attachments \(0\)](#) | [HTML Email Status \(4\)](#) | [Contact Updates \(4\)](#)

**Contact Detail** [Edit](#) [Delete](#) [Clone](#) [Request Update](#)

Contact Owner	<a href="#">Shrikant Baagal [Change]</a>	Phone	(312) 596-1000
Name	Mr. John Bond	Home Phone	
Account Name	<a href="#">Grand Hotels &amp; Resorts Ltd</a>	Mobile	(312) 596-1563
Title	VP, Facilities	Other Phone	
Department	Facilities	Fax	(312) 596-1500
Birthdate	10/1/1952	Email	<a href="#">shrikant.baagal@gmail.com</a>
Reports To	<a href="#">View Org Chart</a>	Assistant	
Lead Source	External Referral	Asst. Phone	
Test Checkbox	<input type="checkbox"/>	Other Address	
Mailing Address	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA		
Languages	English	Level	Primary
Created By	Shrikant Baagal. 12/12/2016 2:24 AM	Last Modified By	Shrikant Baagal. 1/5/2017 7:09 AM

Click on  
"Request Update"

5.2 After click on “Request Update” you will redirect to Stay In Touch page as shown in the following screenshot



Stay In Touch

You can customize the default settings for Stay-in-Touch emails in the [Stay-In-Touch settings](#) page.

**History Details**

Last Stay-in-Touch Request  
1/12/2017 1:06 AM

Last Stay-in-Touch Save 1/12/2017 1:11 AM

**Email Quota Settings**

Single Email Quota Remaining: 490 Organization Limit: 500

Workflow Email Quota Remaining: 1830 Organization Limit: 1830

**Email Settings**

To Mr. Shrikant Bagal

CC

BCC

Email Template  Default Email template [Staying in touch](#) [Preview](#)

Select Different One

[Next](#) [Cancel](#)

### HISTORY DETAILS

The section will show the history of last updated request send to that contact.

### EMAIL QUOTA

The section will show the remaining email quota in your organization

### EMAIL SETTINGS

In this section you can select the email template additional addresses.

### 5.3 Before sending an email application will show you summary of the email.

Stay In Touch

Review

To Mr. Shrikant Bagal

Email Subject Staying in touch

Email Body Hi Shrikant,  
I'm updating my address book and want to make sure I have your correct contact information so we can stay in touch. Can you take a look at the info I have for you below and let me know if it's out of date?

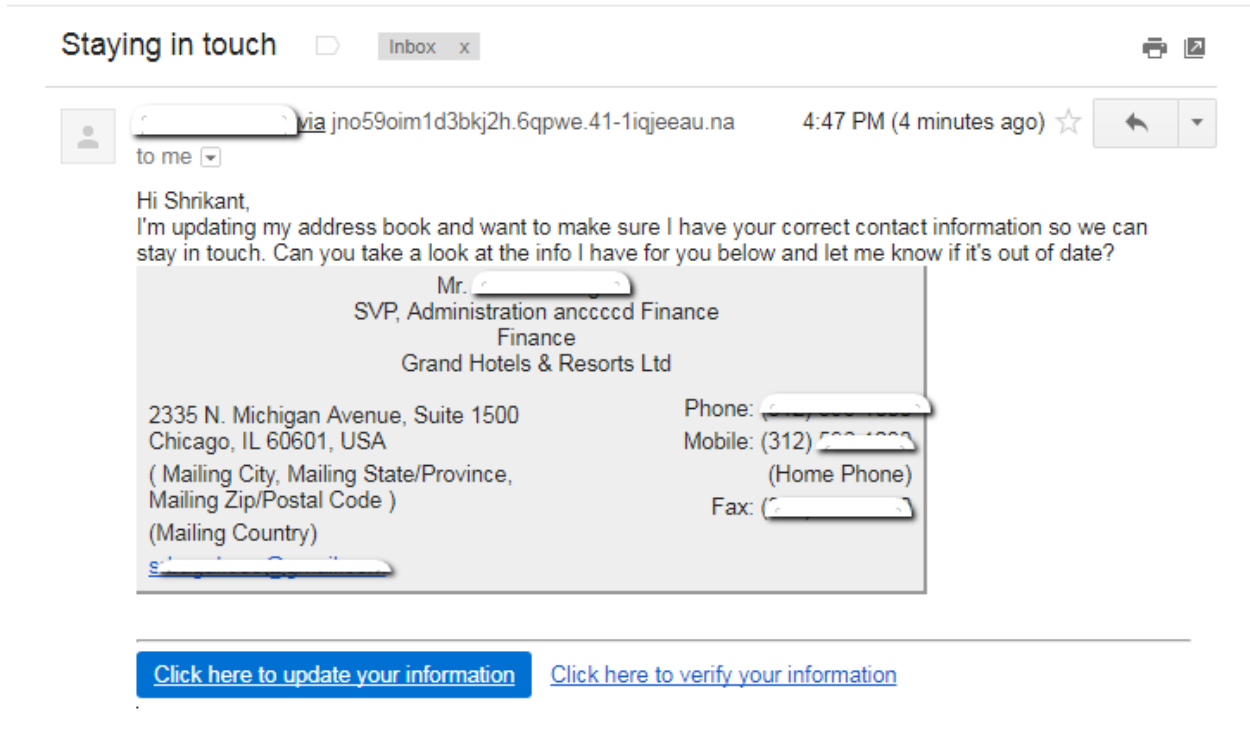
Mr. Shrikant Bagal  
SVP, Administration anccccc Finance  
Finance  
Grand Hotels & Resorts Ltd  
2335 N. Michigan Avenue, Suite 1500  
Chicago, IL 60601, USA  
( Mailing City, Mailing State/Province, Mailing Zip/Postal Code )  
(Mailing Country)  
[srbagal.ceo@gmail.com](mailto:srbagal.ceo@gmail.com)

Phone: (312) 596-1000  
Mobile: (312) 596-1230  
(Home Phone)  
Fax: (312) 596-1500

Previous Send Cancel

AFTER CLICKING ON SEND BUTTON YOU WILL REDIRECT TO CONTACT RECORD AND EMAIL LOCKED AS ACTIVITY UNDER THE RECORD.



## STEP 6: Contact Received Email



The screenshot shows an email titled "Staying in touch" in an inbox. The sender is a contact with a masked name. The email body contains a message from Shrikant asking for contact information updates. A grey box displays the current contact details for Mr. [redacted], including his title (SVP, Administration ancccd Finance), company (Grand Hotels & Resorts Ltd), address (2335 N. Michigan Avenue, Suite 1500, Chicago, IL 60601, USA), and phone numbers (Phone: [redacted], Mobile: (312) 500-1000, Home Phone: [redacted], Fax: [redacted]). At the bottom of the email, there are two buttons: a blue button labeled "Click here to update your information" and a blue link labeled "Click here to verify your information".

The above email will be received by the contact user and they can update the contact information by clicking on "Click here to update your information"

## STEP 7: Update Contact Information


**Stay-in-Touch**


**Please enter your updated contact information.**  
 Information entered in this section will be sent to Shrikant Bagal : CloudExped Solution Pvt Ltd (SIT)

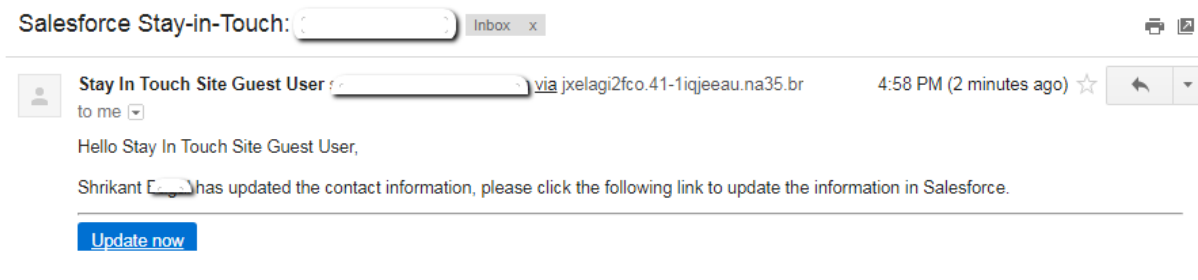
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### Contact Information

<p>Account  <input type="text" value="Grand Hotels &amp; Resorts Ltd"/></p> <p>Asst. Phone  <input type="text"/></p> <p>Business Fax  <input type="text" value="(312) 596-1500"/></p> <p>Department  <input type="text" value="Finance"/></p> <p>First Name  <input type="text" value="Shrikant"/></p> <p>Last Name  <input type="text" value="Bagal"/></p> <p>Mailing Country  <input type="text"/></p> <p>Mailing Street  <input type="text"/></p>	<p>Assistant's Name  <input type="text"/></p> <p>Birthdate  <input type="text" value="7/22/1950"/> [ 8/10/2017 ]</p> <p>Business Phone  <input type="text" value="(312) 596-1000"/></p> <p>Email  <input type="text" value="srbagal.ceo@gmail.com"/></p> <p>Home Phone  <input type="text" value="(996) 054-8267"/></p> <p>Mailing City  <input type="text"/></p> <p>Mailing State/Province  <input type="text"/></p> <p>Mailing Zip/Postal Code  <input type="text"/></p>
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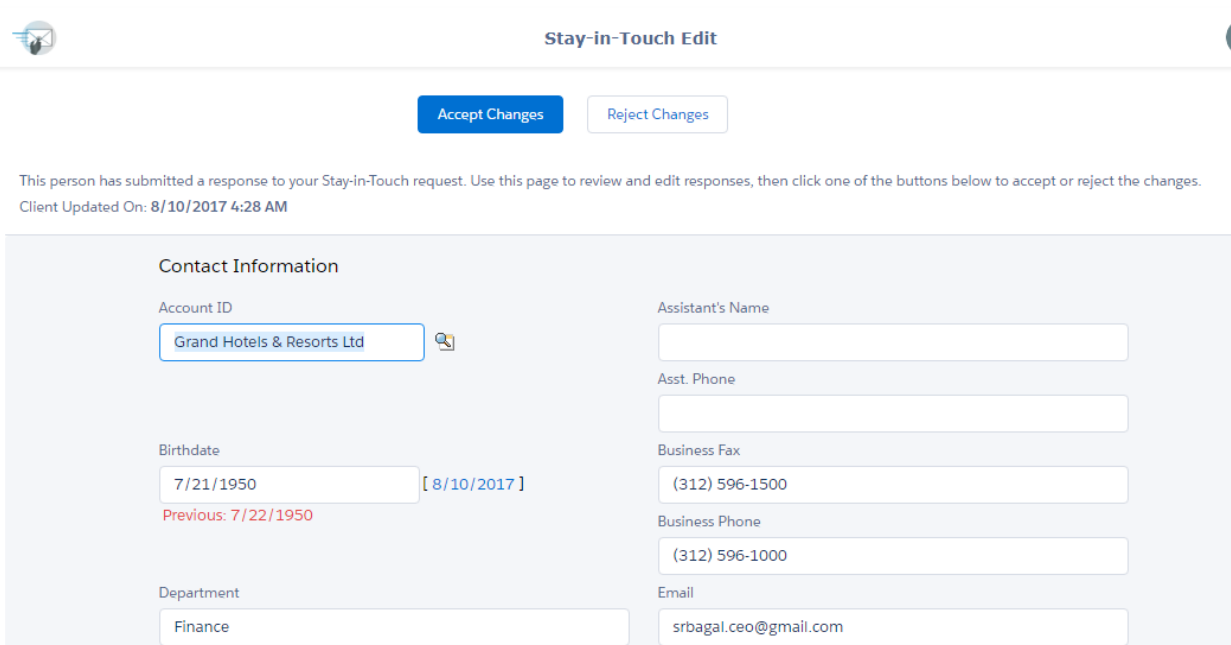
The contact user will redirect to page where he/she will able to see the existing information and they can update the new information and click on “update” button.

## STEP 8: Salesforce User update Notification



The above email will send to Salesforce user saying that information is updated please click on Update now to update the information in Salesforce.

## STEP 9: Update information in Salesforce



**Stay-in-Touch Edit**

[Accept Changes](#) [Reject Changes](#)

This person has submitted a response to your Stay-in-Touch request. Use this page to review and edit responses, then click one of the buttons below to accept or reject the changes.  
Client Updated On: 8/10/2017 4:28 AM

**Contact Information**

Account ID	Assistant's Name
<input type="text" value="Grand Hotels &amp; Resorts Ltd"/>	<input type="text"/>
Birthdate	Asst. Phone
<input type="text" value="7/21/1950"/> [ 8/10/2017 ]	<input type="text"/>
<small>Previous: 7/22/1950</small>	Business Fax
Department	<input type="text" value="(312) 596-1500"/>
<input type="text" value="Finance"/>	Business Phone
	<input type="text" value="(312) 596-1000"/>
	Email
	<input type="text" value="srbagal.ceo@gmail.com"/>

After click on “Update Now” link from email, user will redirect to contact update page as shown in above screenshot.

The information changed, the page will show the previous value just below the field as shown in above screenshot (Birthdate) Field.

User can update the information on Contact record by clicking on “Accept Changes” or they can decline the changes by clicking on “Reject Changes”.