



## '07 Installation, Customization & Upgrade Guide

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Welcome and thank you for your interest in VerticalResponse for AppExchange. This reference guide will walk you through the installation of our newest integrated application.

VerticalResponse for AppExchange provides self-service email and direct mail solutions for all salesforce.com clients. Build mailing lists of any size, send email and postcards to Leads and Contacts, track the post-launch reporting within your salesforce.com account.

## New customers:

Install the app and be up and running in minutes!

## Existing customers:

Seamlessly upgrade without losing any data!

## How to use this guide:

If you are a new customer, simply follow the installation and customization steps to create your new account. If you are an existing customer, you will need to first install the new version of VerticalResponse for AppExchange and then uninstall the older version. Follow the installation and customization steps and then refer to the upgrade instructions at the end of this document.

## 1. Visit the AppExchange and “Get It Now”

- Go to the VerticalResponse listing on salesforce.com’s AppExchange ([http://www.salesforce.com/appexchange/detail\\_overview.jsp?id=a0330000000G19FAAW](http://www.salesforce.com/appexchange/detail_overview.jsp?id=a0330000000G19FAAW))
- Click “Get It Now”
- Enter your salesforce.com username and password, then click the checkbox agreeing to salesforce.com’s Terms of Service.

The AppExchange lists both free and fee-based apps developed by salesforce.com and third-party contributors. To proceed with installing or downloading an app, you'll need to log in and accept the license terms and conditions below.

Please note: The "Download AppExchange Packages" permission on your Salesforce user profile must be enabled in order for you to install or download apps from the AppExchange. This permission is set for most administrators. If you are denied access to the AppExchange during an installation, please contact your Salesforce administrator.

Provide the user name and password for the Salesforce account in which you'd like to install the application.

Location:  Unless you are installing an app into your sandbox, the target location should be www.salesforce.com.

User Name:

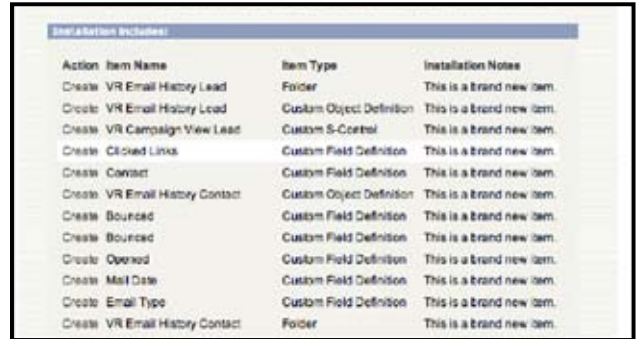
Password:

I have read and agreed to the following terms and conditions:

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## 2. Review Package Components, Set Security Levels & Install!

- Before installing you will have the option to review all the components of VerticalResponse for AppExchange. The package name, version, description will also be noted. Simply click “Next” to proceed.



| Action | Item Name                | Item Type                | Installation Notes        |
|--------|--------------------------|--------------------------|---------------------------|
| Create | VR Email History Lead    | Folder                   | This is a brand new item. |
| Create | VR Email History Lead    | Custom Object Definition | This is a brand new item. |
| Create | VR Campaign View Lead    | Custom S-Control         | This is a brand new item. |
| Create | Closed Links             | Custom Field Definition  | This is a brand new item. |
| Create | Contact                  | Custom Field Definition  | This is a brand new item. |
| Create | VR Email History Contact | Custom Object Definition | This is a brand new item. |
| Create | Bounced                  | Custom Field Definition  | This is a brand new item. |
| Create | Bounced                  | Custom Field Definition  | This is a brand new item. |
| Create | Opened                   | Custom Field Definition  | This is a brand new item. |
| Create | Mail Date                | Custom Field Definition  | This is a brand new item. |
| Create | Email Type               | Custom Field Definition  | This is a brand new item. |
| Create | VR Email History Contact | Folder                   | This is a brand new item. |

- Choose security levels to determine which user profiles can access VerticalResponse for AppExchange. Click “Next” to continue.



Choose security level [Help for this Page](#)

Step 3 of 4: Choose security level Step 3 of 4

Select security settings

- Admin access only Best for limited deployments. Users with your profile will have full access.
- Grant access to all users All user profiles will have full access.
- Select security settings Recommended for most applications.

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

- Now you're ready to install the application! Just click the “Install” button and VerticalResponse for AppExchange will be added into your salesforce.com account.



Install Package [Help for this Page](#)

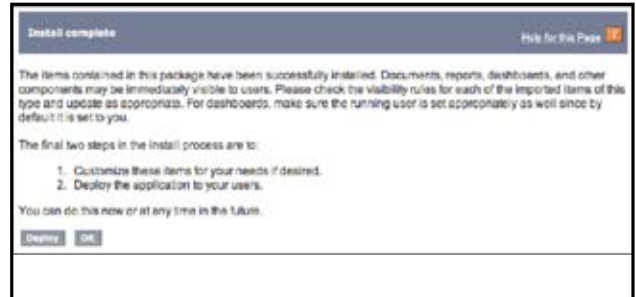
Step 4 of 4: Install Package Step 4 of 4

The package is ready to be installed. Click Install to continue.

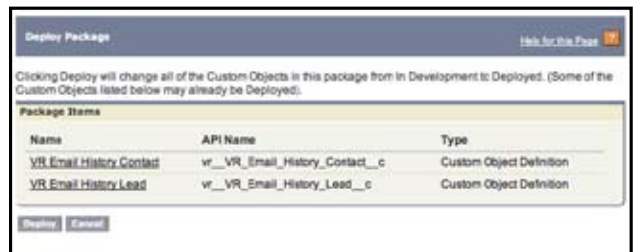
[Previous](#) [Install](#) [Cancel](#)

## 3. Completing the Installation and Exposing Custom Objects

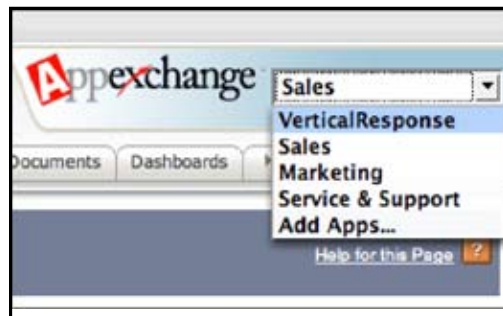
- Now that the application has been installed you have the option to immediately deploy the Custom Object components or choose to customize them first before rolling them out.



- If you choose to deploy the Custom Objects now you will see a listing of the two reporting objects: **VR Email History Lead** and **VR Email History Contact**. To proceed, simply click “Deploy.”



- Almost done! You've now completed the initial installation of VerticalResponse for AppExchange and you will see a summary screen that displays the application details. In addition “VerticalResponse” now appears in the AppExchange drop-down menu in the upper right-hand corner of your salesforce.com account.



- Now it's time to edit your Lead and Contact Page Layouts to expose the VerticalResponse Custom Objects. Simply follow the steps below to complete the installation process.

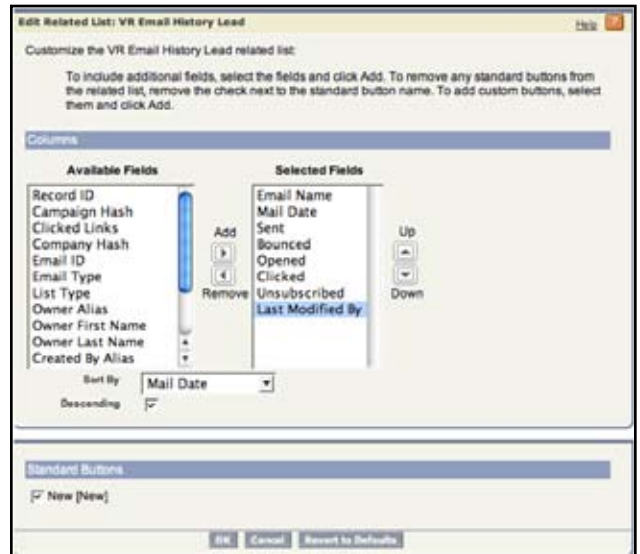
## Adding VR Email History Lead to the Leads Page Layout

- Setup > App Setup > Customize > Leads > Page Layouts
- Choose your Page Layout and then click “Edit”
- Select “Lead Related Lists” from the drop-down menu and locate **VR Email History Lead**
- Drag the **VR Email History Lead** into the Related List Section of the page layout
- Click “Quick Save”



## Customizing the List View Display for VR Email History Lead

- Single-click the **VR Email History Lead** label within the Related Lists section
- Click “Edit Properties”
- Customize your list view display for Leads
- NOTE: We recommend the following display fields:
  - Email Name (default)
  - Mail Date
  - Sent
  - Bounced
  - Opened
  - Clicked
  - Unsubscribed
  - Last Modified By
- When finished, click “OK” and then make sure to click “Save” on the Lead Layout page.



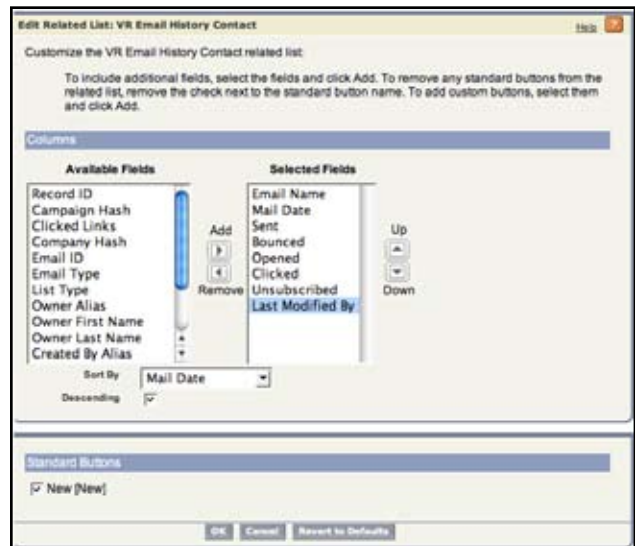
## Add VR Email History Contact to the Contacts Page Layout

- Setup > App Setup > Customize > Contacts > Page Layouts
- Choose your Page Layout and then click “Edit”
- Select “Contact Related Lists” from the drop-down menu and locate **VR Email History Contact**
- Drag the **VR Email History Contact** into the Related List Section of the page layout
- Click “Quick Save”



## Customize the list view display for VR Email History Contact

- Single-click the **VR Email History Contact** label within the Related Lists section
- Click “Edit Properties”
- Customize your list view display for Contacts
- NOTE: We recommend the following display fields:
  - Email Name (default)
  - Mail Date
  - Sent
  - Bounced
  - Opened
  - Clicked
  - Unsubscribed
  - Last Modified By
- When finished, click “OK” and then make sure to click “Save” on the Contact Layout page.



Congratulations, you've completed the installation and customization for VerticalResponse for AppExchange! By clicking on any of the VR custom tabs you'll automatically be set up with a VerticalResponse account or be linked your existing account should one already exist.

Now you can create and send email campaigns and view the post-launch statistics update in the Custom Objects on the Lead and Contact record level.

## 4. Upgrading “VerticalResponse for AppExchange”

If you are an existing customer and have completed the installation and customization process above you actually just “upgraded” as well! The new application now lives within your salesforce.com account and the next step would be to uninstall the older version. You will notice that the AppExchange drop-down menu in your account shows two entries for “VerticalResponse” and you can differentiate between the two as the new version contains additional tabs (Reports and Dashboards).

By uninstalling the older version of VerticalResponse for AppExchange no data will be lost, you are simply removing the app from your salesforce.com interface. To uninstall the older version of VerticalResponse for AppExchange, please follow the instructions below:

- Go to Setup > App Setup > Exchange > Installed Apps
- Locate “VerticalResponse 2.0” which is the Download Name
- Click “Uninstall”

NOTE: You will see a warning page requiring you to carefully review and confirm your decision to uninstall the app. You can proceed with the uninstall as the new application is already installed and no data will be lost.