

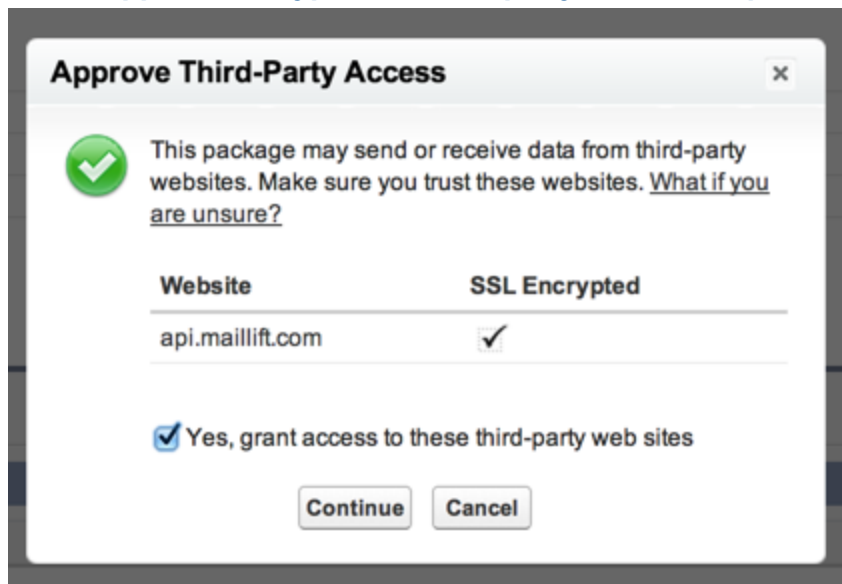
Install MailLift Preview in Salesforce

This guide gets you started with installing MailLift in your Salesforce instance. MailLift permissions can be assigned to users or profiles using the “MailLift Permissions” permission set.

1. Go to the link to install the package

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti00000004ZCi>

2. Approve encrypted SSL 3rd party access to api.maillift.com



3. Review and approve API by clicking “Next”

Step 1. Approve Package API Access

Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Goals	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Goal Collaborators	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Goal Links	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Coaching	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Orders	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Performance Cycles	✓	✓	✓	✓
Feedback	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Feedback Questions	✓	✓	✓	✓	Products	✓	✓	✓	✓
Feedback Question Sets	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Feedback Requests	✓	✓	✓	✓	Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

4. Grant access to the desired profiles. The MailLift permission set makes it easy to assign permissions to a user or profile later. MailLift recommends granting access to admins only.

Step 2. Choose security level

Step 2 of 3

Select security settings:

- Grant access to admins only Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

5. Click Install to complete the installation process. It will take a few moments for the next page to load as Salesforce installs the package in your environment.

Step 3. Install Package

Step 3 of 3

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


Previous Install Cancel

6. Installation complete.

Package Details
MailLift (Managed)

[Help for this Page](#)

[Back to List: Users](#)

 **Install Complete**
Follow any remaining steps in the app install guide to complete deployment.

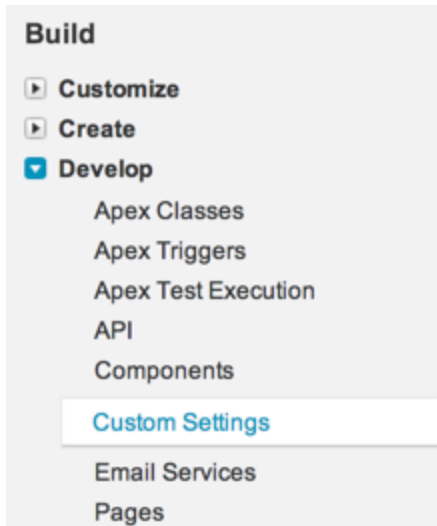
Installed Package Detail

[Uninstall](#) [View Components](#) [View Dependencies](#)

Package Name	MailLift	Version Number	1.1 (Beta 3)
Language	English	Package Type	Managed
Version Name	Beta	API Access	Unrestricted [Enable Restrictions]
Namespace Prefix	MailLift	Modified By	Daniel Jurek , 5/16/2014 9:02 AM
Publisher	MailLift		
Description	Send Hand Written Letters using the MailLift API		
Installed By	Daniel Jurek , 5/16/2014 9:02 AM		

7. Set up your account and API key

a. Go to Setup > Develop > Custom Settings




Build

- ▶ **Customize**
- ▶ **Create**
- Develop**
 - Apex Classes
 - Apex Triggers
 - Apex Test Execution
 - API
 - Components
 - Custom Settings**
 - Email Services
 - Pages

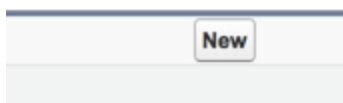
b. Click on “Manage” next to MailLift

View: [All](#) [Create New View](#)

Action	Label ↑	Visibility
Manage	 MailLift	Public

Manage - Record 1 - MailLift

c. Click “New”



[New](#)

- d. Set the name to “Default” and fill in your API Key and Username from the MailLift developer’s tab

Provide values for the fields you created. This data is cached with the application.

Edit MailLift Save Save & New Cancel

MailLift Information

Name	<input type="text" value="Default"/> i
Api Key	<input type="text" value="a83s8l29alaf93ja93la"/>
Username	<input type="text" value="example@example.co"/>

8. Edit the Lead layout to add MailLift
 - a. Go to Setup > Build > Customize > Leads > Page Layouts
 - b. Select “Lead Layout” at the bottom of the layout list. (This enables everyone with permission to see MailLifts for a lead)

[Expand All](#) | [Collapse All](#)

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize**
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads**
 - Fields
 - Related Lookup Filters New!
 - Validation Rules
 - Triggers
 - Page Layouts
 - Field Sets

Lead Page Layout

This page allows you to create different page layouts to display Lead data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by

Lead Page Layouts [New](#) [Page Layout Assignment](#)

Action	Page Layout Name	Created By
Edit Del	Lead (Marketing) Layout	Daniel Jurek , 5/15/2014 4:11 PM
Edit Del	Lead (Sales) Layout	Daniel Jurek , 5/15/2014 4:11 PM
Edit Del	Lead (Support) Layout	Daniel Jurek , 5/15/2014 4:11 PM
Edit Del	Lead Layout	Daniel Jurek , 5/15/2014 4:11 PM

- c. In the Lead layout editor, select “Related Lists” then drag the MailLift item to the desired location on the page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Activity History	HTML Email Status	Related Content
Approval History	MailLifts	
Campaign History	Notes & / Label: MailLifts	
Content Deliveries	Open Activities	

Fields
Buttons
Actions
Expanded Lookups
Related Lists
Report Charts
Components

Related Lists

Open Activities

New Task New Event New Meeting Re

Subject	Task	Due Date
Sample Subject	✓	5/16/2014 9:09 AM

HTML Email Status

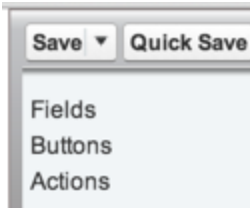
Subject	Date Sent
Sample Subject	5/16/2014 9:09 AM

MailLifts

New

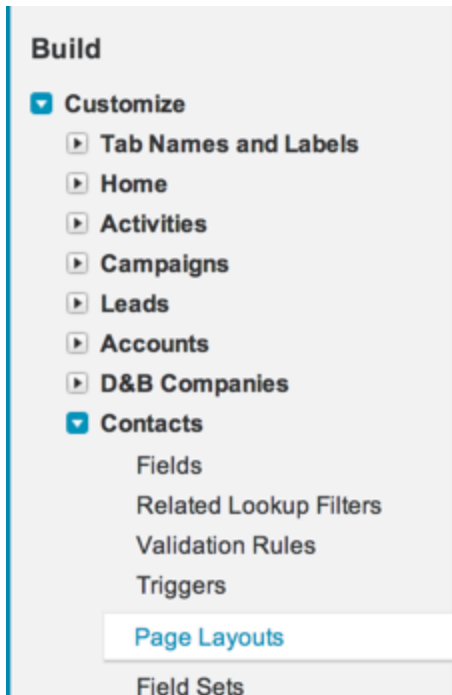
MailLift ID	Status
Sample MailLift ID	Sample Status

d. Click Save



9. Edit the Contact layout to include MailLift

- a. Go to Setup > Build > Customize > Contacts > Page Layouts



- b. Click "Edit" on the general Contact Layout (this enables everyone with permission to see MailLifts for a contact)

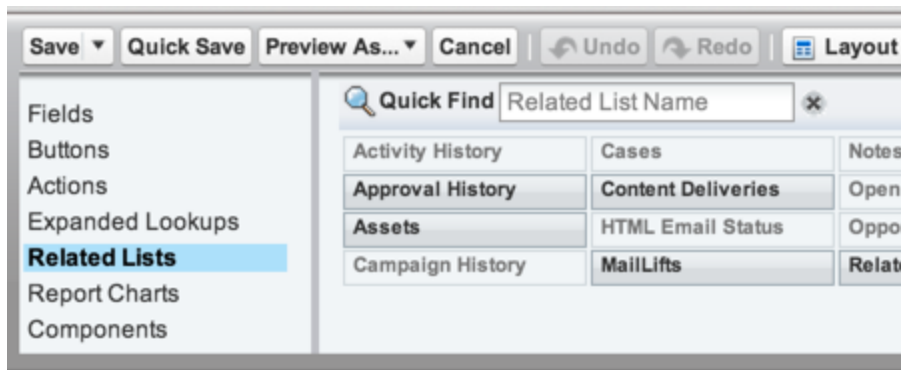
Contact Page Layout

This page allows you to create different page layouts to display Contact data.

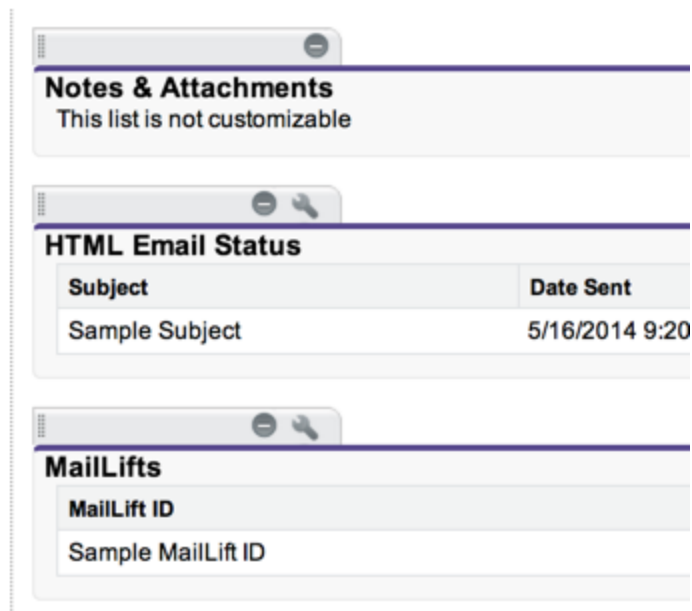
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Contact Page Layouts			New	Page Layout Assignment
Action	Page Layout Name	Created By		
Edit Del	Contact (Marketing) Layout	Daniel Jurek , 5/15/2014 4:11 PM		
Edit Del	Contact (Sales) Layout	Daniel Jurek , 5/15/2014 4:11 PM		
Edit Del	Contact (Support) Layout	Daniel Jurek , 5/15/2014 4:11 PM		
Edit Del	Contact Layout	Daniel Jurek , 5/15/2014 4:11 PM		

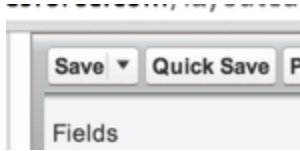
c. From the “Related Lists” menu select “MailLifts”



d. Drag the “MailLifts” object to the desired location in the page



e. Click “Save”



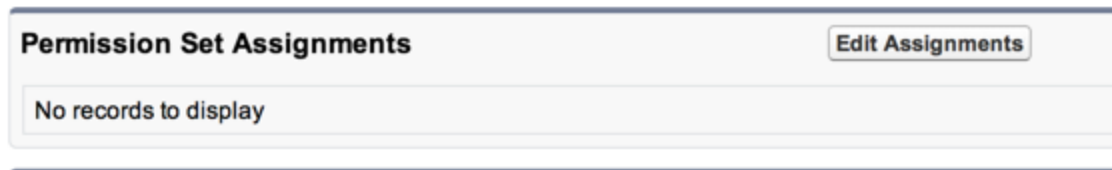
10. Assign permissions to the right users

a. Go to Setup > Manage Users > Users

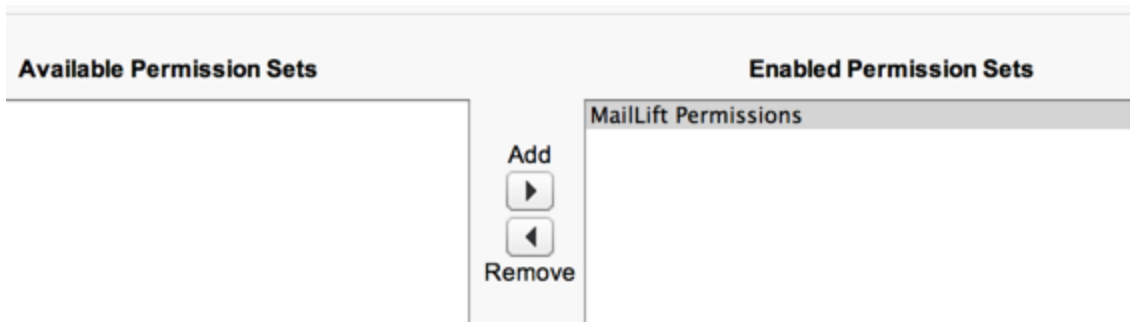


b. Select a user

c. Go to “Permission Set Assignments” and click on “Edit Assignments”



d. Select “MailLift Permissions” in the left side and click the “Add” arrow to assign the permission set



e. Click Save

11. Users with the MailLift Permissions permission set can now send Handwritten letters from Leads and Contacts

HTML Email Status

[Send an Email](#)

No records to display

MailLifts

[New MailLift](#)

Action	MailLift ID	From	To
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