

# Salesforce connector: installing

## Installing the package in Salesforce

The MailUp for Salesforce connector is currently available, free of charge, at the following address (v2.3)

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000kq5q>

**i** If you are testing the package in a Salesforce sandbox organization, change the first part of the URL to <http://test.salesforce.com>

In the Package components page you will notice some information on items that will be added to your organization's system: you can simply click on **Continue**.

- Installing the package in Salesforce
- Editing your Salesforce layouts
  - Campaign Layout
  - Campaign Member Layout
- Connecting Salesforce to your MailUp account
  - Upgrading from v1.73 (or below) to v2.3
- Scheduling tasks
- Mapping fields
- You're done!

**Package Components**

▼ Tabs (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Fields Mapping		Tab	This is a brand new co
Create	Configuration		Tab	This is a brand new co

▼ Apps (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	MailUp		App	This is a brand new co

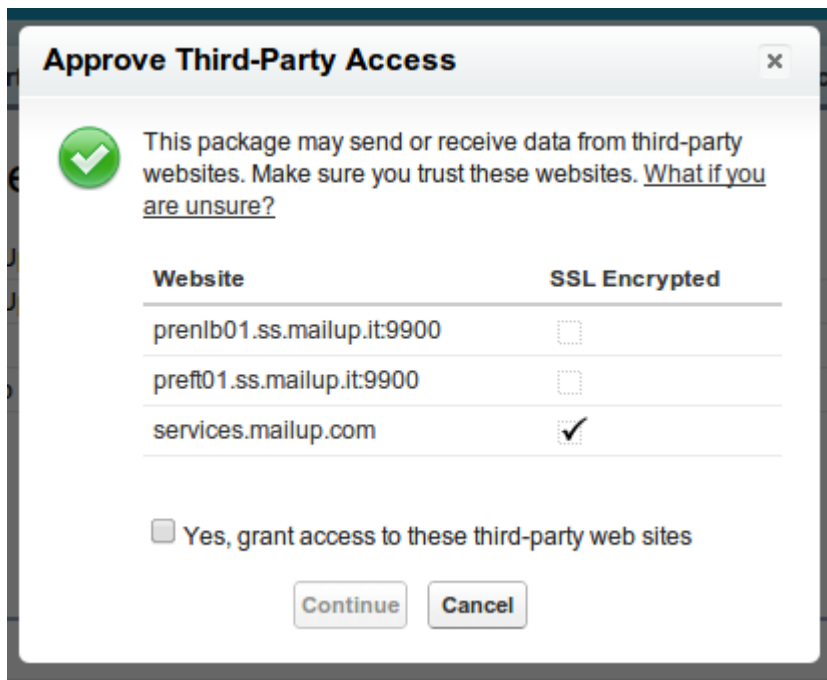
▼ Objects (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	MailUpConfiguration		Custom Setting	This is a brand new co
Create	MailUpFieldMapping		Custom Setting	This is a brand new co

▼ Fields (30)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Views	Campaign Member	Custom Field	This is a brand new co

Next: please authorize the communication between your MailUp account and Salesforce by selecting the appropriate checkbox and clicking on **Continue**.



You will then see a summary of the API access requirements for this package. Just click on **Next** to proceed.

Step 1. Approve Package API Access
Step 1

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**  
Components in this package will have the user's full API access to the following custom objects included in the package:

- MailUpConfiguration
- MailupFieldMapping

**Extended Object Permissions**

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Price Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

You can then define the access levels for your different users' roles: select the desired granted level and click on **Continue**.

Step 2. Choose security level
Step 2

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)

**Customize security**

These security settings determine access to the custom objects and components installed in the package. It doesn't affect permissions for existing objects.

**i** Standard profiles (including the Read-Only profile) don't receive access to any installed custom objects. Because permissions are not editable for standard profiles, you must clone your profile to grant access. [Tell me more!](#)

Action	Access Level	Description
<a href="#">Set All</a>	No Access	No access to any features in this package.
<a href="#">Set All</a>	Full Access	Full access to all features and fields in this package

Please select a level of access to the features in this package for each of your organization's custom profiles.

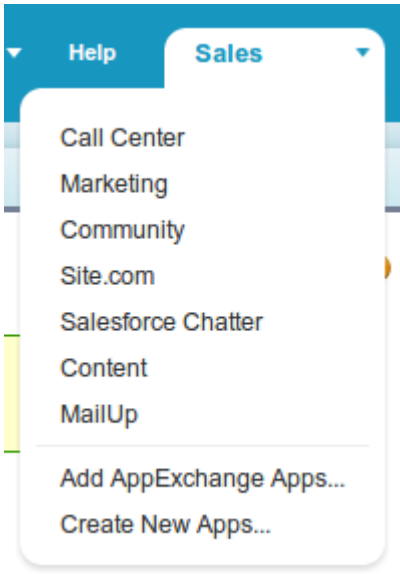
Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Authenticated Website	<input type="button" value="No Access"/>
High Volume Customer Portal	<input type="button" value="No Access"/>
Standard Platform User	<input type="button" value="No Access"/>
Custom: Marketing Profile	<input type="button" value="No Access"/>

You have now completed your configuration and can click on **Install**.

Step 3. Install Package
Step 3

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

Once the installation has been completed, you will find the MailUp for Salesforce connector listed together with other installed components in the *Sales* menu.



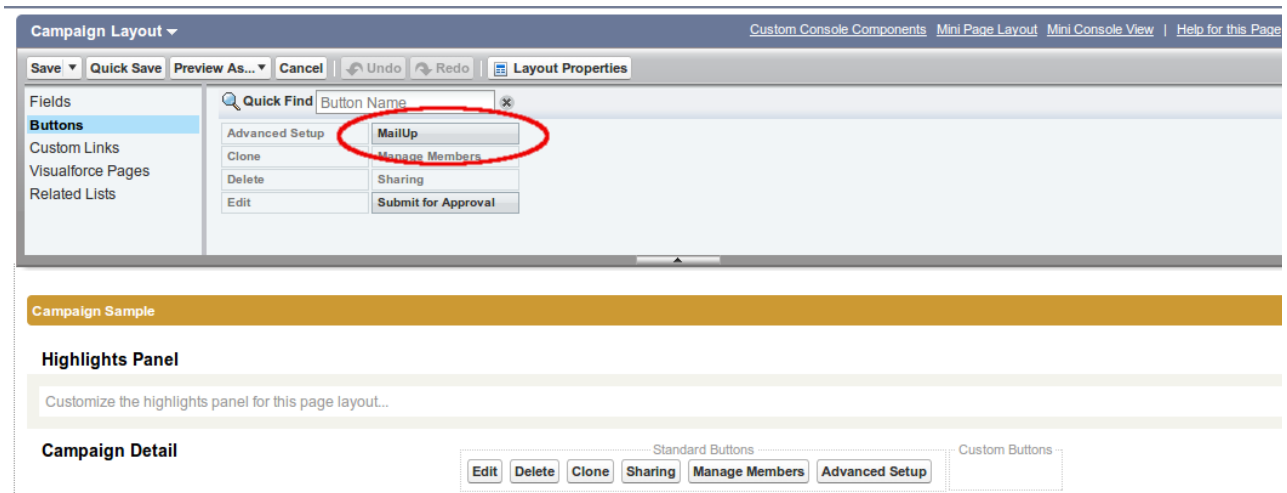
## Editing your Salesforce layouts

The next steps is to edit a few of the layouts used in Salesforce for use with the connector.

### Campaign Layout

First you will need to edit the Campaign page layout.

- Access the **Campaign PageLayout**: at the left column of your Salesforce console by selecting *Build > Customize > Campaigns > Page layout*.
- First add a custom MailUp button to the page:
  - Click *Edit* and select the MailUp button (already available in your fields and buttons lists).
  - Drag it to the custom buttons area in the *Campaign Detail* section
  - Save the layout changes by clicking on the *Save* button at the upper left corner.



- Next, you will add some new fields to the Campaign page layout
- To do so click again on *Edit*, and select *Fields*.
- Click on the *Section* button and drag it to the area you want the MailUp section to appear (normally below Campaign Details section)
- A pop-up will appear to configure the section:
  - Name the section MailUp
  - Select the 2-column option (the tab-key order option doesn't matter)

- Click OK
- Now that you have added a MailUp section to the page, add the following fields to it by dragging and dropping the corresponding buttons into that section
  - MailUp total views
  - MailUp total clicks
  - MailUp total bounces
  - MailUp total unsubscription
- The new MailUp section should look similar to this:

MailUp	
MailUp total views	18.420
MailUp total bounces	57.269
MailUp total clicks	13.916
MailUp total unsubscriptions	85.515

- Click on Save to save the changes to the Campaign layout.

## Campaign Member Layout

Follow the same process to edit your **Campaign Member Page Layout**.

You will find it under *Build > Customize > Campaigns > Campaign Member > Page Layout*.

- Create a *MailUp* section by dragging the *Section* button into the Campaign Details section
- Name it MailUp and save the edited layout.
- Add the following fields to it by dragging and dropping the corresponding buttons into that section
  - Views
  - Clicks
  - Bounced
  - Unsubscribed
- The new MailUp section should look similar to this:

MailUp	
Bounced	<input checked="" type="checkbox"/>
Unsubscribed	<input checked="" type="checkbox"/>
Views	18.799
Clicks	79.691

- Click on Save to save the changes to the Campaign Member layout.

## Connecting Salesforce to your MailUp account

It's now time to connect your Salesforce organization to a List in your MailUp account.

- Use the new *Configuration* tab to configure the MailUp for Salesforce connector
- Connect your MailUp account
- Choose the MailUp List ID that you wish to connect to. It's a number and you can find it in your MailUp platform next to the list name, in the list selection dropdown.

### Warning

MailUp is a multi-list environment, but you can only associate with your Salesforce organization one MailUp account and one List within that account.

Any contacts or message that will be exported from Salesforce into your MailUp console will be available within that List.

## Upgrading from v1.73 (or below) to v2.3

Since authentication method has changed starting from v2.3, if you're upgrading from a previous version, there are four steps you need to take:

### STEP 1: Installation

Go to the [installation link](#) to upgrade your installation to version 2.3. If required, log in to your Salesforce organization.



## Upgrade MailUp for Salesforce

By MailUp SpA



An earlier version is installed. It can be upgraded while preserving the existing data.  
Installed: Spring 2017 (2.3)    New Version: Spring 2017 (2.3)



Install for Admins Only



Install for All Users



Install for Specific Profiles...

Upgrade

Cancel

Choose if you want to install the package for **all users**, **admins only** or just for **specific profiles**, then click **Upgrade**.

The upgrade process will take a few moments. A confirmation screen will let you know when it's over. Click on **Done** to proceed.



## Upgrade MailUp for Salesforce

By MailUp SpA



Upgrade Complete!

Done

### STEP 2: Authentication

After the upgrade, you'll be taken to the "Installed packages" screen in your Preferences. From here, click on the "Configuration" tab, as shown below.

mailup  
BE RELEVANT

Search... Search

Home Campaigns Fields Mapping **Configuration** +

Quick Find / Search... Expand All | Collapse All

Lightning Experience Migration Assistant  
Switch to the modern, intelligent Salesforce.  
Get Started

Salesforce Mobile Quick Start

## Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Developn customize before deploying. You can deploy the components individually using the other features in setup or as a group by clickir

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	MailUp	MailUp	2.3	MailUp
	Description MailUp Connector			

Now click on "Login with MailUp", to re-authorize the connector on your MailUp account.

mailup  
BE RELEVANT

Welcome to the authorization server

Enter your credentials to proceed.

Username

Password

Login

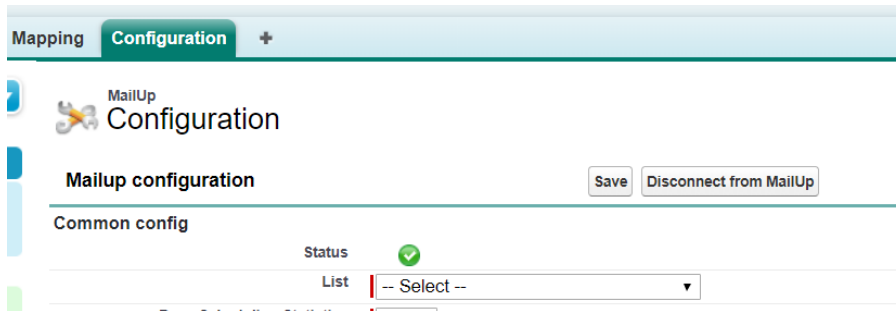
Enter Username and Password for the MailUp account that was previously connected to Salesforce and click "Login", then on "Confirm".

### STEP 3: List configuration

Once the account is reauthorized, you will be redirected to your Salesforce org. A green tick near **Status** will confirm that the authorization process was successful.

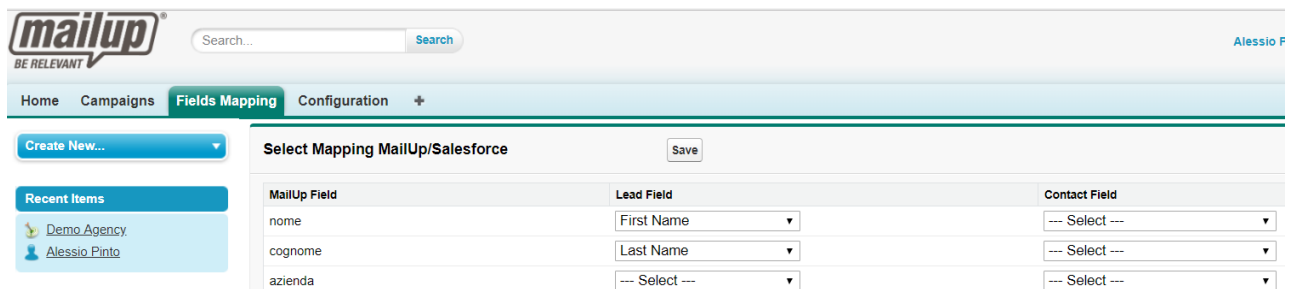
Now you will need to choose the MailUp list that will be used by the connector.

Since you're upgrading from a previous version, **make sure you select the same list that was connected before the upgrade, then click "Save"**.



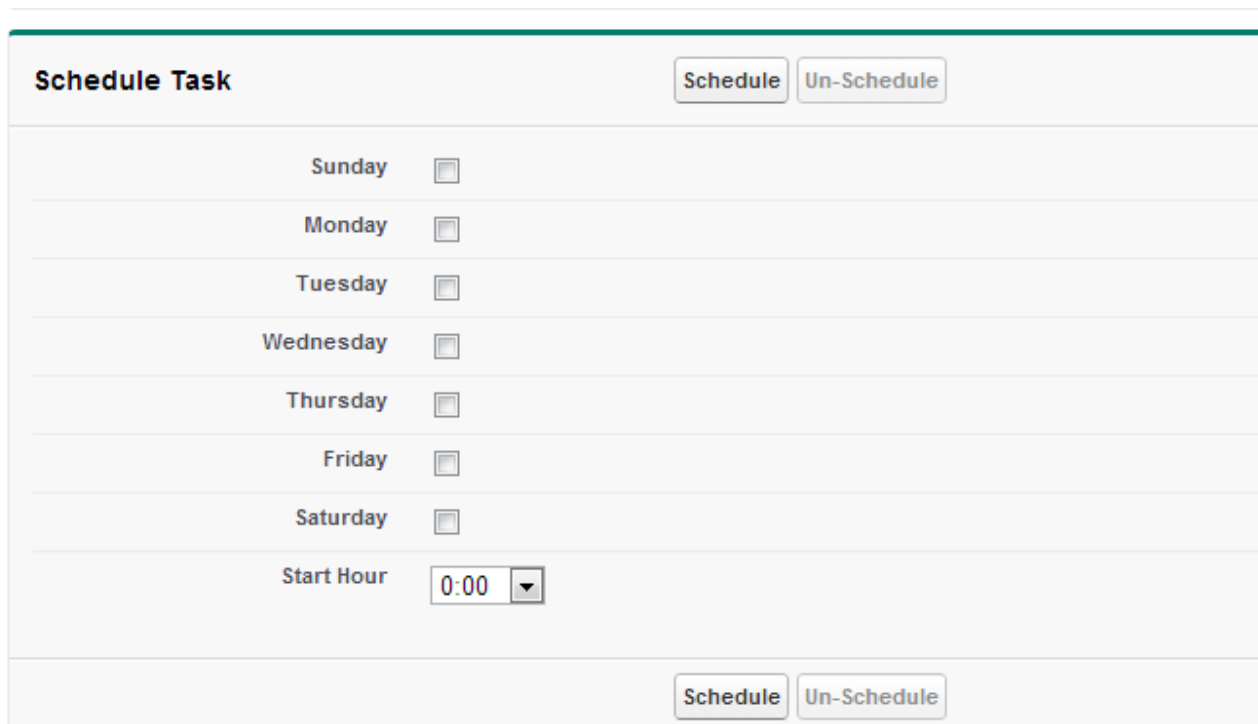
#### STEP 4: Check fields mapping

Now click on "Fields mapping" Tab, to ensure that the fields are mapped exactly as they were before the upgrade process.



## Scheduling tasks

Your Salesforce organization is now connected to the list your specified in your MailUp account. The bottom of the *Configuration* page has another section called **Schedule Task**.



This section is meant to allow you to schedule an import of your email campaign statistics. The statistics will be retrieved once a day at the time you specify after you sent your campaign.

**Schedule Task** Schedule Un-Schedule

Sunday Yes	Monday Yes	Tuesday Yes	Wednesday Yes	Thursday Yes	Friday Yes	Saturday Yes	Running Hour 0:00	Times Fired 0
Sunday <input checked="" type="checkbox"/>								
Monday <input checked="" type="checkbox"/>								
Tuesday <input checked="" type="checkbox"/>								
Wednesday <input checked="" type="checkbox"/>								
Thursday <input checked="" type="checkbox"/>								
Friday <input checked="" type="checkbox"/>								
Saturday <input checked="" type="checkbox"/>								
Start Hour							0:00 <input type="text"/>	

Schedule Un-Schedule

You can select for how long the sync will be active, by choosing a days value (between 1 and 120) in the Configuration.

## Configuration

**Mailup configuration** Save Disconnect from MailUp

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**Common config**

Status ✔

List Newsletter ▼

Days Scheduling Statistics 120 ▼

## Mapping fields

Finally, you will want to map fields between your lead and contact database in Salesforce and your recipient database in MailUp (learn more about custom [recipient fields](#) in MailUp).

To do so, click on the new **Field Mapping** tab in the navigation.

- On the left you will see the recipient fields imported from MailUp
- In the second and third column you will see Lead and Contact Fields
- Map the ones that are relevant to you: when campaign members are *pushed* to MailUp during the setup of a MailUp campaign in Salesforce, the data contained in the fields mapped on this page will be copied from Salesforce to MailUp.
- You do not need to map all the fields
- When you are done, click on **Save** at the top of the page.



### Warning

Do not map the email address as this is already mapped by the code as the unique identifier of your contact!



Home Campaigns **Fields Mapping** Configuration +

Create New...

Recent Items

- test Giulia 22/5
- test Giulia 17/5
- Nobile
- Test Giulia 14/5
- Davide Miaoone
- testhhhh
- Campagna prova Micol
- Nobilis
- Migone
- DM Campaign to Top Customers - Nov 12-23, 2001

Recycle Bin

**Seleziona la mappatura MailUp/Salesforce** Save

MailUp Field	Lead Field	Contact Field
nome	First Name	First Name
cognome	Last Name	Last Name
azienda	--- Select ---	--- Select ---
città	--- Select ---	--- Select ---
provincia	--- Select ---	--- Select ---
cap	--- Select ---	--- Select ---
regione	--- Select ---	--- Select ---
paese	--- Select ---	--- Select ---
indirizzo	--- Select ---	--- Select ---
fax	--- Select ---	--- Select ---
telefono	--- Select ---	--- Select ---
IDCliente	--- Select ---	--- Select ---
IDUltimoOrdine	--- Select ---	--- Select ---
DataUltimoOrdine	--- Select ---	--- Select ---
TotaleUltimoOrdine	--- Select ---	--- Select ---
IDProdottiUltimoOrdine	--- Select ---	--- Select ---
IDCategorieUltimoOrdine	--- Select ---	--- Select ---
DataUltimoOrdineSpedito	--- Select ---	--- Select ---

## You're done!

You've completed the installation and configuration of the MailUp connector for Salesforce.

You can now [start your first campaign!](#)