MassMailer Configuration Guide

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MassMailer Overview

- MassMailer is an easy-to-use tool that allows mass emailing to more than the Salesforce limit of 250
recipients in a batch and 1000 emails a day.

- MassMailer provides the ability to schedule email delivery via:
  
  - Campaigns
  - Leads
  - Contacts
  - Users

- Use the MassMailer wizard to build views of Leads, Contacts, and Users to whom you want to send mass emails.

SendGrid Prerequisite

SendGrid is the email service tool necessary to use MassMailer. You can set up a SendGrid account at [http://www.sendgrid.com](http://www.sendgrid.com/) and approve third-party access to SendGrid when you install MassMailer. Or, you can click the Sign Up link on the MassMailer Setup Tab and then add your SendGrid credentials to MassMailer in Salesforce manually.

When you set up your SendGrid accounts, choose from Bronze, Silver, Gold, or Platinum level:
• For Silver, Bronze, Gold, and Platinum accounts, SendGrid provides notifications like: Delivered/Invalid/Click/New/Unsubscribe/Bounce/Spam.

It is important to ensure that the timezone you have selected for your SendGrid account and your Salesforce org match.

On the Account Overview screen in SendGrid, click Edit Profile to change your timezone.

In Salesforce, select Setup from the drop-down beside your name in the upper right-hand part of the screen, then under Personal Setup, select My Personal Information => Personal Information and click edit to change the timezone.
Installing the MassMailer App

MassMailer is a private application that cannot be found by searching the Salesforce App Exchange.

MassMailer can be installed from the following URL:

https://appexchange.salesforce.com/listingDetail?listingId=a0N30000005uxj5EAA

Steps to Install MassMailer

1. After clicking the above link to the MassMailer App Exchange detail page, click Get It Now, then choose to install in your production or sandbox Salesforce org:
2. Indicate that you have read and agreed to the terms, and click **Confirm and Install!**

3. When prompted, provide your Salesforce login credentials.

4. The Package Installation Details page shows the MassMailer components that will be added. Click **Continue** to add MassMailer.
5. A dialog will prompt for permission to approve third-party settings. Select **Yes, grant access to these third-party web sites**, then click **Continue**.

6. MassMailer will use your Salesforce credentials to find your SendGrid account and redirect you to the **Approve Package API Access** page.

   Click **Next**. See **SendGrid Prerequisite**.
7. From the **Choose security level** page, you can grant access to:

- **Admins Only**
- **All users**
- **Specify your own settings**

Select the security level you want to use and click **Next**.

8. From the Installation Package page, click **Install**.
9. You will receive an email from support@salesforce.com when the installation is complete.

MassMailer Quick Setup

From the MassMailer Setup tab, you can perform the following functions:

1. Set up your SendGrid information. You must have a SendGrid login to use MassMailer.

2. Set up your Force.com site for event notifications.

3. Select email fields from Lead, Contact, and Account to include in your MassMailer emails.

4. Set up campaigns with the scheduler to send MassMailer emails.

The first two steps are one-time only.
## 1. SendGrid Login

Click the **Sign Up** link on the main MassMailer Setup tab to open the SendGrid website and set up a SendGrid account.

Once you have your SendGrid credentials, click (1) **SendGrid Login** on the MassMailer Setup tab to provide MassMailer with those credentials. Click **Edit** to enter or update the User Name and Password on the Account Information screen.
Once you save your credentials on this screen, you will not have to provide them again.

2. Event Notification URL

Before this step, you must first register the Force.com domain for your Salesforce site URL.

Use the URL from that step to build the MassMailer URL. For example, if your Salesforce site URL is:
Your Event Notification URL would be:

```
```

If your domain name contains the word "secure," then include "secure" in your Event Notification URL. For example, if your domain is:

```
```

Then your Event Notification URL would be:

```
```

And your Stay-in-Touch Site URL would be:

```
```

Note that your Event Notification URL will be in the format of:

```
{Your Default Web Address from your MassMailer Site}/services/apexrest/sendgrid4sf/MassMailer_hook
```

And your Stay-in-Touch Site URL is just the your domain:
To set up these two URLs on the MassMailer Setup tab, click (2) Event Notification URL, then click Edit and enter or paste the URLs in the Site URL and Stay-in-Touch Site URL fields.

Once you save your Site URL and Stay-in-Touch Site URL on this screen, you will not have to provide them again.

Note: Save your Company Timezone here and it should be same as your Salesforce Org Timezone.

For getting the Salesforce Org Timezone, Follow certain steps:

- Go to Company Information under Company Profile section.
- Click Edit.
- Scroll down and go to Locale Settings and Default Timezone is your salesforce org timezone.
3. Field Information

Before you can use the MassMailer Email Wizard to build views of Leads, Contacts, or Accounts for which to schedule mass email deliveries, you need to select which email fields to use for Leads, Contacts, and Accounts.

Click (3) Field Information, and then click Edit. Select from all Email fields you have defined for Lead, Contact, and Account. Click Save.

Click Edit in the below Section and Enter your Global sender Name, Global Sender Email and Global Bcc Email. Click Save.

4. Schedule
You can also run the scheduler to send scheduled emails for Campaigns, Schedule One-off and Mass Email Wizard from the MassMailer Setup tab.

<table>
<thead>
<tr>
<th>Start Here</th>
<th>Schedule Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 SendGrid Login</td>
<td>* Click on Schedule Button.</td>
</tr>
<tr>
<td>2 Event Notification URL</td>
<td></td>
</tr>
<tr>
<td>3 Field Information</td>
<td>Schedule</td>
</tr>
<tr>
<td>4 Schedule</td>
<td></td>
</tr>
</tbody>
</table>

### Setting up Salesforce for MassMailer

Once the MassMailer application is installed in your Salesforce org, you need to perform the following tasks to set up MassMailer in Salesforce:

- Setting Up the Force.com Site
- Setting Up the Remote Site Settings
- Setting Up Salesforce Users for MassMailer
- MassMailer SG Campaign Page Layout
- MassMailer SG Lead Page Layout
- MassMailer SG Contact Page Layout

### Setting Up Remote Site Settings

For Setting up Remote Site Settings, you need to follow certain steps:

- Click on Remote Site settings under Security control section.
Administration Setup

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
  - Sharing Settings
  - Field Accessibility
  - Password Policies
  - Session Settings
  - Network Access
  - Activations
  - Session Management **New!**
  - Login Access Policies
  - Certificate and Key Management
  - Single Sign-On Settings
  - Auth. Providers
  - Identity Provider
  - View Setup Audit Trail
  - Account Owner Report
  - Expire All Passwords
  - Delegated Administration
  - **Remote Site Settings**
  - File Upload and Download Security
  - Portal Health Check

- Click on New Remote Site button.

- Enter **Remote Site Name** and Paste Stay In touch URL in **Remote Site Url** Section. For Stay IN Touch URL Click here and make it active.
Setting Up the Force.com Site

You must designate the Force.com site that will capture email event notifications for mass mailings.

To set up a Force.com site:

1. To set up a Force.com domain name, click Setup => Develop => Sites.

2. On the Sites page, enter a domain name, then click Check Availability to verify that the domain name has not yet been used.
3. Once you choose a domain name that is available, select the box to indicate that you have read and accepted the Site Terms of Use and then click Register My Force.com Domain.

4. There are two ways to create the event notification URL for MassMailer to route email responses such as Delivered, Open, Spam, etc. Select one or the other of the following two options:

- Option 1 Make sendgrid4sf__eventvf the Active Site Home Page
- Option 2 Add the sentgrid4sf__eventvf Visualforce page to the site

To Make sitegrid4sf__eventvf the Active Site Home Page

1. Once you have successfully registered your domain, you will have the option to edit the site. Click New.

2. Name the Site and select Active. Save the changes.
To Add the Visualforce Pages to an Existing Site

1. Click Setup => Develop => Sites.
2. On the Sites page, click the Site Label of the site to which you want to add the Visualforce pages.

Note that you do not have to make SendGrid the active home page. You only need to add the Visualforce pages to an existing site (see the next step).

3. On the resulting Site Details page, click Edit in the Site Visualforce Pages area.

4. On the resulting Enable Visualforce Page page, select sendgrid4sf.eventvf and sendgrid4sfContactStayintouch and use the Add arrow to move each of them to the Enabled Visualforce Pages. Click Save.
To Set Up Salesforce Permissions

In order to grant public access to MassMailer, you have to grant permissions to the Event Notification profile.

1. Click Setup => Develop => Sites.

2. On the Sites page, click the Site Label of the site to which you want to add the public access.
3. **Click Public Access Settings** of Site Details page to open its profile.

4. **Click Edit** on the profile for the Site you created.
5. In the Standard Object Permissions section of the profile, select Read and Create for Accounts, Campaigns, Contacts, and Leads.

6. In the Custom Object Permissions section of the profile, select all MassMailer Email Status and Mass Stay-in-Touch permissions. Click **Save**.

7. Once you have saved the MassMailer profile, scroll to the Field-Level Security section of the profile and click **[View]** next to Mass Stay-in-Touch.
8. Click **Edit** to modify the visibility of the Mass Stay-in-Touch fields for the MassMailer profile. Then, select the Visible checkbox for each field, and click **Save**.
9. Then, on the MassMailer profile, scroll to the Enable Apex Class section of the screen and click **Edit**.

10. Select `sendgrid4sf.emailnotify`, `sendgrid4sf.Ctrl_ContactStayintouch` and `sendgrid4sf.MassEmailWizard_Insertion` from the Available Apex Classes and use the Add arrow to move them each to the Enabled Apex Classes. Click **Save**.
Setting Up Salesforce Users for MassMailer

You need to assign a MassMailer license to all users in your Salesforce org who will have permission to use the application and if you want to use the functionality of Mass Stay In Touch then you need to assign one Licence to Site Guest User.

1. Access the Salesforce Installed Packages by selecting Setup => App Setup => Installed Packages.

2. On the Installed Packages page, click MassMailer.
3. From the MassMailer page detail page, click Manage Licenses.

4. Click Add Users.

5. Then select each user you want to assign a MassMailer license.
Note: The number of users cannot exceed the number of MassMailer licenses you have purchased. Only those users with licenses can see and use MassMailer.

Assigning Licence to Site Guest User, you need to follow certain steps:

- Login with Admin User.
- Click on Setup -> Click on Develop Under App Setup Section -> then Sites.

- Click on Site Label.
- Click on Public Access Settings.

- Then, Click on View Users.

- Click on Site Guest User Name.
• Scroll down and click on Assign Licenses under Manage Packages section.

### MassMailer SG_Campaign Layout

The MassMailer SendGrid Campaign page layout, **SG_Campaign Layout**, includes the following buttons:

- **Schedule via MassMailer**
- **MassMailer Clone**
- **Set Member Status**

To manage these buttons and assign this page layout to profiles so that users will see it, follow these instructions:

### SG_Campaign Layout - MassMailer Buttons
To edit the SG_Campaign layout to add, remove, or reorder these buttons:


2. Click **Edit** beside the SG_Campaigns page layout.

3. Click **Buttons** to drag and drop **MassMailer Clone**, **Schedule Via MassMailer**, and **Set Member Status** buttons.
4. Drag and drop MassMailer Clone, Schedule Via MassMailer, and Set Member Status buttons on or off the SG_Campaign layout, reordering in the Custom Buttons section if desired. Click Save if you make changes to the Campaign layout.

Assigning SG_Campaign Page Layout

To assign this Campaign page layout to your users’ profiles:

2. From the Campaigns Page Layout, click **Page Layout Assignment**.

![Campaign Page Layout](image)

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Page Layout Name</th>
<th>Installed Package</th>
<th>Created By</th>
<th>Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Campaign Layout</td>
<td>Wenda McMahan</td>
<td>7/23/2012 1:40 PM</td>
<td>Wenda McMahan</td>
</tr>
<tr>
<td>Del</td>
<td>SG_Campaign Layout</td>
<td>MassMailer</td>
<td>8/31/2013 3:31 PM</td>
<td>Wenda McMahan</td>
</tr>
</tbody>
</table>

3. On the resulting Campaign Page Layout Assignment detail page, click **Edit Assignment**.

![Page Layout Assignment](image)

The table below shows the page layout assignments for different profiles.

<table>
<thead>
<tr>
<th>Profiles</th>
<th>Page Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Manager</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Custom: Marketing Profile</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Custom: Sales Profile</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Custom: Support Profile</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Gold Partner User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Marketing User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Partner Community Login User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Partner Community User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Read Only</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Silver Partner User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Solution Manager</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>Standard User</td>
<td>Campaign Layout</td>
</tr>
<tr>
<td>System Administrator</td>
<td>Campaign Layout</td>
</tr>
</tbody>
</table>

4. From the Edit Page Layout Assignment detail page, click to select the page layout beside each profile to assign the MassMailer layout, then select **SG_Campaign Layout** from the drop-down list.

**Hold Shift** to select the first and last and all profiles between them; **hold Ctrl** to select multiple profiles, not necessarily in order.
5. Click **Save** to update the Campaign Page Layout assignment(s) for the selected profiles.
Enabling MassMailer on Existing Campaign Layout

You can also update an existing Campaign page layout to include MassMailer functionality:

1. Click *Edit Layout* on a Campaign detail page.

![Campaign Layout Edit](image)

2. Click on *Fields* and add a *Section* on your Page and name it as *MassMailer Email Statistics*.

![Section Added](image)
3. Now Drag and Drop following fields in the Section added:

- Total Request
- Total Open
- Total Blocks
- Total Bounces
- Total Repeat SpamReports
- Total Spam Drop
- Total Repeat Bounces
- Total Delivered
- Total Clicks
- Total Spam Reports
- Total Unsubscribes
- Total Invalid Emails
- Total Unique Opens
- Total Unique Clicks
- Total Repeat Unsubscribes

4. Scroll to the Activity History related list and click the wrench icon (settings).

5. Click + to expand the Buttons section of the Activity History settings.
6. From the Buttons section, select **Schedule Email via MassMailer** and use the Add arrow to move it to the Selected Buttons. Click **OK**.

7. Continuing in the related lists on the Campaign page layout, drag and drop **MassMailer Email Status** where you want it onto your Campaign related lists.
8. Click the wrench icon (settings) beside the MassMailer Email Status related list on the Campaign page layout to edit the columns that display.

**NOTE:** When selecting fields, choose the **Date_Time, Email, Event and Reason** fields for MassMailer Email Status as shown below.
MassMailer SG_Lead Layout

To enable MassMailer to build views of Leads and schedule mass mailings to them:

- Assign the SG_Lead Layout to profiles, or
- Update another Lead layout to include the Email via MassMailer button on Lead Activities.

Assigning SG_Leads Page Layout

To assign the SG_Lead page layout to your users' profiles:


2. From the Leads Page Layout, click Page Layout Assignment.
3. On the resulting Lead Page Layout Assignment detail page, click **Edit Assignment**.

4. From the Edit Page Layout Assignment detail page, click to select the page layout beside each profile to assign the MassMailer layout, then select **SG_Lead Layout** from the drop-down list.

   *Hold Shift to select the first and last and all profiles between them; hold Ctrl to select multiple profiles, not necessarily in order.*
5. Click **Save** to update the Lead Page Layout assignment(s) for the selected profiles.
Enabling MassMailer on Existing Lead Layout

You can also update an existing Lead page layout to include MassMailer functionality:

1. Click **Edit Layout** on a Lead detail page.

2. Make sure you include the **Invalid Lead** and **Email Opt Out** fields on the Lead page layout.

3. Scroll to the Activity History related list and click the wrench icon (settings).
4. Click + to expand the Buttons section of the Activity History settings.

5. From the Buttons section, select Schedule Email via MassMailer and use the Add arrow to move it to the Selected Buttons. Click OK.
6. Continuing in the related lists on the Lead page layout, drag and drop **MassMailer Email Status** where you want it onto your Lead related lists.

7. Click the wrench icon (settings) beside the MassMailer Email Status related list on the Lead page layout to edit the columns that display.

**NOTE:** When selecting fields, choose the **Date_Time**, **Event**, **Email** and **Reason** fields for MassMailer Email Status as shown below:
MassMailer SG_Contact Page Layout

To enable MassMailer to build views of Contacts and schedule mass mailings to them:

- Assign the SG_Contact Layout to profiles, or
- Update another Contact layout to include the Email via MassMailer button on Contact Activities.

Assigning SG_ContactPage Layout

To assign the SG_Contact page layout to your users’ profiles:

2. From the Contact Page Layout, click **Page Layout Assignment**.

3. On the resulting Contact Page Layout Assignment detail page, click **Edit Assignment**.
4. From the Edit Page Layout Assignment detail page, click to select the page layout beside each profile to assign the MassMailer layout, then select **SG_Contact Layout** from the drop-down list.

   Hold **Shift** to select the first and last and all profiles between them; hold **Ctrl** to select multiple profiles, not necessarily in order.
5. Click **Save** to update the Contact Page Layout assignment(s) for the selected profiles.
You can also manually add the Email via MassMailer buttons on Activity History and MassMailer Email Status related list on any Contact page layout by following the steps in the Enabling MassMailer on Existing Lead Layout section.

Make sure to include the Invalid SendGrid and Email Opt Out fields on Contact page layouts that you want to use with MassMailer.

Mass Email Wizard Create Custom Views

Use the Mass Email Wizard tab to build views of Leads, Contacts, or Users for which you can then schedule mass email deliveries.

1. Click the Mass Email Wizard tab.

2. From the drop-down, select the object for which to create a MassMailer view: Lead, Contact, or User.
3. The default view for the object you select is “All.” You can select a view and edit it, or create a new view.

4. When creating and editing views, choose the filters and fields to display just as you would with any Salesforce view.
You can then select a template, build the email, and either send immediately or schedule when you want the delivery to be sent.

See the MassMailer User Guide for more information on scheduling mass emails.

Click Add Filter Logic to access the following screen where you can use AND and OR with parentheses to set up more complex filter relationships for your view:
Upgrading MassMailer to the Latest Version
Upgrading MassMailer is very easy. Use the same link that you used to install MassMailer to install the upgraded version:

https://appExchange.salesforce.com/listingDetail?listingId=a0N30000005uxj5EAA

The following screen will appear when an upgraded version of MassMailer is available. Click Continue and then follow the rest of the steps to install MassMailer.

---

Removing Unsubscribe Link From Emails

If you do not want to display this unsubscribe Link in your Emails as shown in the following Screenshot:

---

To disable this Link, Follow certain Steps:

- Click on Apps tab.
Now, Disable this Subscription Tracking App.

Now, If you Send Emails using MassMailer then you will not receive that Unsubscribe Link in your Emails.

### Field permissions for different Profiles

**For System Administrator:**

Email Opt-out field not available. We have to make available this email opt-out field.

Go to Security Control --> Field Accessibility --> Lead (or Contact) --> View By Profiles --> Choose System Administrator --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select visible & make it checked.
For Standard User:

By default, Salesforce provides only read access to Campaign and does not provide access to any of the custom objects for Standard User.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. Mass Mailing Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. Mass Mailing Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>
4. **Mass Stay-in-Touch**
   Read, create, edit, delete, view all, modify all

5. **Send Grid**
   Read, create, edit, delete, view all, modify all

6. If the User have access to Campaign then only following Permission is required.
   **SendGrid4sfs**
   Read, create, edit, delete, view all, modify all

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Standard User Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

Email Opt-out field is not available. We have to make available this email opt-out field.

Go to Security Control --> Field Accessibility --> Lead (or Contact) --> view By Profiles --> Choose Standard User Profile --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select visible & make it checked.
For Marketing User:

By default, Salesforce provides read, create, edit, delete access to Campaign and does not provide access to any of the custom objects for Standard User.

Now, we have to provide access to marketing users so that they can create and edit campaigns. For this,

- Go to administration setup --> Manage users ---> users.
- Click on the user full Name with Marketing user profile.
- Click on Edit button.
- Check the Marketing User checkbox under user Details section as shown below.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. MassMailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. MassMailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>

6. If the User have access to Campaign then only following Permission is required
For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Marketing User Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

Email Opt-out field not available. We have to make available this email opt-out field.

Go to Security Control --> Field Accessibility --> Lead (or Contact) --> view By Profiles --> Choose Marketing User Profile --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select visible & make it checked --> Click Save.
For Salesforce Platform User:

By default, Salesforce provide Read, Create, Edit, Delete access to account, contact and does not provide any access to campaign, Lead and any of the custom Objects.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. Mass Mailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. Mass Mailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>
5. **Send Grid**

*Read, create, edit, delete, view all, modify all*

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Marketing User Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

![Custom Object Permissions](image)

Email Opt-out field not available. We have to make available this email opt-out field.

Go to Security Control --> Field Accessibility --> Lead(or Contact) --> view By Profiles --> Choose Salesforce Platform User Profile --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select visible & make it checked.

![Field accessibility for Profile: Salesforce Platform User1](image)
For Force.com User:

By default, Salesforce provide only Read access to Account & Contact and does not provide any access to any of the custom objects.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. Mass Mailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. Mass Mailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>

For giving permissions to all these objects:

- Go to Administration Setup -> Manage Users -> Users.
- Click on the Force.com Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

Email Opt-out field not available. We have to make available this email opt-out field.

Go to Security Control -> Field Accessibility -> Lead(or Contact) -> view By Profiles -> Choose Force.com User Profile -> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available -> Select visible & make it checked.
For Customer Community User:

Profiles related to Customer Community User and their permissions:

High Volume Customer Portal
By Default Salesforce does not provide access to Accounts, Contacts and any of the Custom Objects.

Customer Community

By Default, Salesforce Provide only Read, Edit access for Accounts & Read, Edit, Create access for Contacts and does not provide access to any of Custom Objects.

Note: Customer Community User cannot use email templates. User can only send email by writing it manually. Accounts & Contacts tab are not visible for Customer Community profile.

For Making Custom Objects available in Customer Community User, We need to follow the certain steps:

- Go to App Setup --> Create --> objects.
- Click on Edit Button beside the objects that you want to give permissions.
- Give permissions to the following objects that are highlighted in the following snapshot.
Click on Edit button.
Now, Scroll down & go to Optional features and mark the Available for customer portal checkbox as shown below.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. Mass Mailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. Mass Mailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Customer Community Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

For making all the fields available, follow the steps:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
• Scroll down & Go to Field Level Security for the following highlighted objects.

- Click on View, then edit button and Make all the fields visible.
- Follow same steps for all the objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Tabs available in Customer Portal, follow Certain Steps:

- Go to App Setup --> Customize --> Customer Portal --> Settings --> Portal Name.

- Click On Customize Portal Tabs Button.
- Choose the tabs which you want to make available for customer portal and then click on add.

- Click Save.

We have to set the fields which are not available in the Layout. For getting the fields:
Go to Security Control --> Field Accessibility --> Contact --> view By Profiles --> Choose Customer Community
User Custom Profile --> Click on the email opt out field & Invalid Contact + fields which you want to make available --> Select Visible box & make it checked --> Click Save.

Customer Portal Manager Custom

By Default, Salesforce Provide only Read access for Accounts & Read, Create, Edit access for Contacts and does not provide access to any of Custom Objects.
Note: We can use Email Templates for Customer Portal Manager Custom profile. We can Make Accounts & Contacts tab visible for this profile by making it Delegated External User Administrator.

For Making Custom Objects available in Customer Portal Manager Custom User, We need to follow the certain steps:

- Go to App Setup --> Create --> objects.
- Click on Edit Button beside the objects that you want to give permissions.
- Give permissions to the following objects that are highlighted in the following snapshot.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>MassMailer</td>
<td></td>
</tr>
<tr>
<td>MassMailer Email Status</td>
<td>MassMailer</td>
</tr>
<tr>
<td>MassMailerView</td>
<td>MassMailer</td>
</tr>
<tr>
<td>MassMailer Touch</td>
<td>MassMailer</td>
</tr>
<tr>
<td>SFCA Version</td>
<td>MassMailer</td>
</tr>
<tr>
<td>Search Phrase</td>
<td>MassMailer</td>
</tr>
<tr>
<td>SendAuditor</td>
<td>MassMailer</td>
</tr>
<tr>
<td>Text Ad</td>
<td>MassMailer</td>
</tr>
<tr>
<td>Order History</td>
<td>MassMailer</td>
</tr>
</tbody>
</table>

Now, Scroll down & go to Optional features and mark the Available for customer portal checkbox as shown in the following screenshot.

http://support.mansasy.com/support/solutions/articles/69151-mass-mailer-configuration-guide
1. **Mass Email Statistics**
   Read, create, edit, delete, view all, modify all
2. **MassMailer Email Status**
   Read, create, edit, delete, view all, modify all
3. **MassMailer Views**
   Read, create, edit, delete, view all, modify all
4. **Mass Stay-in-Touch**
   Read, create, edit, delete, view all, modify all
5. **Send Grid**
   Read, create, edit, delete, view all, modify all

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

For making all the fields available, follow the steps:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
- Scroll down & Go to Field Level Security for the following highlighted objects.

- Click on View, then edit button and Make all the fields visible.
- Follow same steps for all the highlighted objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Custom Tabs available in Customer Portal, follow Certain Steps:
- Go to App Setup --> Customize --> Customer Portal --> Settings --> Portal Name

**Customer Portal Setup**

<table>
<thead>
<tr>
<th>Portals</th>
<th>Ports Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Name</td>
</tr>
</tbody>
</table>

- **Click On Customize Portal Tabs Button.**
- **Choose the tabs which you want to make available for customer portal and then click on add.**

For Making Account & Contact Tabs available in Customer Portal, follow Certain Steps:

- Go to Administration Setup --> Manage Users --> Users.
- **Click on the Customer Portal Manager Custom Profile.**
- **Click on Edit.**
- **Scroll Down & go to Administrative Permissions.**
- Select Delegated External User Administrator and make it checked.

- Click Save.
- Again Click on Edit Button.
- Scroll down & go to Standard Tab Settings and make Accounts, Contacts “Default ON”.

We have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control -- Field Accessibility -- Contact -- view By Profiles -- Choose Customer Portal Manager Custom User Custom Profile -- Click on the field which you want to make available -- Select Visible box & make it checked -- Click Save.
By Default, Salesforce provide only Read access for Accounts & Contacts and does not provide access to any of Custom Objects.

Note: We can use Email Templates for Customer Portal Manager Standard profile.
For Making Custom Objects available in Customer Portal Manager Custom User, We need to follow the certain steps:

- Go to App Setup --> Create --> objects.
- Click on Edit Button beside the objects that you want to give permissions.
- Give permissions to the following objects that are highlighted in the following snapshot.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>2. Mass Mailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>3. Mass Mailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>
For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

![Custom Object Permissions]

For making all the fields available, follow the steps:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
- Scroll down & Go to Field Level Security for the following highlighted objects.

![Custom Field-Level Security]

- Click on View, then edit button and Make all the fields visible.
- Follow same steps for all the highlighted objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Custom Tabs available in Customer Portal, follow Certain Steps:

- Go to App Setup --> Customize --> Customer Portal --> Settings --> Portal Name

![Customer Portal Setup]

- Click On Customize Portal Tabs Button.
- Choose the tabs which you want to make available for customer portal and then click on add.

- Click Save.

Now, we have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control -> Field Accessibility -> Contact -> view By Profiles -> Choose Customer Portal Manager Standard User Custom Profile -> Click on the email opt out field & Invalid Contact + fields which you want to make available -> Select Visible box & make it checked -> Click Save.
Customer Community Login

By Default, Salesforce Provide only Read, Edit access for Accounts & Read, Edit, Create access for Contacts and does not provide access to any of Custom Objects.

**Note:** Customer Community User cannot use email templates. User can only send email by writing it manually. Accounts & Contacts tab are not visible for Customer Community profile.
For Making Custom Objects available in Customer Community User, We need to follow the certain steps:

- Go to App Setup --> Create --> objects.
- Click on Edit Button beside the objects that you want to give permissions.
- Give permissions to the following objects that are highlighted in the following snapshot.

- Click on Edit button.
- Now, Scroll down & go to Optional features and mark Available for customer portal checkbox as shown below.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Email Statistics</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>Mass Mailer Email Status</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>Mass Mailer Views</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>Mass Stay-in-Touch</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
<tr>
<td>Send Grid</td>
<td>Read, create, edit, delete, view all, modify all</td>
</tr>
</tbody>
</table>

For giving permissions to all these objects:
Go to Administration Setup -> Manage Users -> Users.

Click on the profile that you want to give permissions, then Edit button.

Scroll down & Go to custom object permissions and give the above mentioned permissions.

For making all the fields available, follow the steps:

Go to Administration Setup -> Manage Users -> Users.

Click on the profile that you want to give permissions.

Scroll down & Go to Field Level Security for the following highlighted objects.

Click on View, then edit button and Make all the fields visible.

Follow same steps for all the objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Tabs available in Customer Portal, follow Certain Steps:

Go to App Setup --> Customize --> Customer Portal --> Settings --> Portal Name.

Click On Customize Portal Tabs Button.
Choose the tabs which you want to make available for customer portal and then click on add.

- Choose the tabs which you want to make available for customer portal and then click on add.

Now, we have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control -> Field Accessibility -> Contact -> view By Profiles -> Choose Customer Community Login User Custom Profile -> Click on the email opt out field & Invalid Contact + fields which you want to make available -> Select Visible box & make it checked -> Click Save.
For Partner Community User:

Profiles related to Partner Community and their permission settings are:

Gold Partner user
By default Salesforce provides Read, Create, and Edit Permissions for Account, Contact and Lead. There is no access for Campaign and not for custom objects.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>2. Mass Mailing Email Status</td>
<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>3. Mass Mailing Views</td>
<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>4. Mass Stay-in-Touch</td>
<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete</td>
</tr>
</tbody>
</table>

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

For making all the fields available, follow the steps:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
- Scroll down & Go to Field Level Security for the following highlighted objects.

- Click on View, then edit button and Make all the fields visible.
- Follow same steps for all the highlighted objects like Mass Email Statistics, MassMailer Email Status etc.
Now, For Making Tabs available in Partner Portal, follow Certain Steps:

- Go to App Setup --> Customize --> Partners --> Settings --> Portal Name.

```
[Image]
```

- Click On Customize Portal Tabs Button.
- Choose the tabs which you want to make available for Partner Portal and then click on add.

```
[Image]
```

- Click Save.

Now, we have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control --> Field Accessibility --> Lead (or Contact or Account) --> view By Profiles --> Choose Gold Partner User Custom Profile --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select Visible box & make it checked --> Click Save.
Partner Community User

By default Salesforce provides Read, Create, and Edit Permissions for Account, Contact and Lead. There is no access for Campaign and not for custom objects.

Now, we have to give Permissions to following Custom Objects:

<table>
<thead>
<tr>
<th>Custom Objects</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Email Statistics</td>
<td>Read, create, edit, delete</td>
</tr>
</tbody>
</table>
2. **Mass Mailer Email Status**  
   Read, create, edit, delete

3. **Mass Mailer Views**  
   Read, create, edit, delete

4. **Mass Stay-in-Touch**  
   Read, create, edit, delete

5. **Send Grid**  
   Read, create, edit, delete

---

For giving permissions to all these objects:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

---

For making all the fields available, follow the steps:

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
- Scroll down & Go to Field Level Security for the following highlighted objects.

---

Click on View, then edit button and Make all the fields visible.

Follow same steps for all the highlighted objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Tabs available in Partner Portal, follow Certain Steps:
- Go to App Setup -> Customize -> Partners -> Settings -> Portal Name.

- Click On Customize Portal Tabs Button.
- Choose the tabs which you want to make available for Partner Portal and then click on add.

- Click Save.

Now, we have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control -> Field Accessibility -> Lead (or Contact or Account) -> view By Profiles -> Choose Partner Community User Custom Profile -> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available -> Select Visible box & make it checked -> Click Save.
By default Salesforce provides Read, Create, and Edit Permissions for Account, Contact and Lead. There is no access for Campaign and not for custom objects.

Now, we have to give Permissions to following Custom Objects:
### Custom Objects

<table>
<thead>
<tr>
<th></th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Mass Email Statistics</td>
<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>2. Mass Mailer Email Status</td>
<td>Read, create, edit, delete</td>
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<tr>
<td>3. Mass Mailer Views</td>
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<td>Read, create, edit, delete</td>
</tr>
<tr>
<td>5. Send Grid</td>
<td>Read, create, edit, delete</td>
</tr>
</tbody>
</table>

**For giving permissions to all these objects:**

- Go to Administration Setup --> Manage Users --> Users.
- Click on the Custom profile that you want to give permissions, then Edit button.
- Scroll down & Go to custom object permissions and give the above mentioned permissions.

![Custom Object Permissions Diagram](image)

**For making all the fields available, follow the steps:**

- Go to Administration Setup --> Manage Users --> Users.
- Click on the profile that you want to give permissions.
- Scroll down & Go to Field Level Security for the following highlighted objects.

![Custom Field-Level Security Diagram](image)

- Click on View, then edit button and Make all the fields visible.
- Follow same steps for all the highlighted objects like Mass Email Statistics, MassMailer Email Status etc.

Now, For Making Tabs available in Partner Portal, follow Certain Steps:
Go to App Setup --> Customize --> Partners --> Settings --> Portal Name.

- Go to App Setup --> Customize --> Partners --> Settings --> Portal Name.

- Click On Customize Portal Tabs Button.
- Choose the tabs which you want to make available for Partner Portal and then click on add.

Now, we have to set the fields which are not available in the Layout. For getting the fields:

Go to Security Control --> Field Accessibility --> Lead (or Contact or Account) --> view By Profiles --> Choose Partner Community Login User Custom Profile --> Click on the email opt out field & Invalid (Lead, Account or Contact) + fields which you want to make available --> Select Visible box & make it checked --> Click Save.
### Field accessibility for Profile: Partner Community Login1

Click on a cell in the table below to change the field's accessibility.

<table>
<thead>
<tr>
<th>Field</th>
<th>Field Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Editable</td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>Editable</td>
</tr>
<tr>
<td>Campaign</td>
<td>Editable</td>
</tr>
<tr>
<td>Company</td>
<td>Required</td>
</tr>
<tr>
<td>Correlation Data</td>
<td>Hidden</td>
</tr>
<tr>
<td>CorrelationID</td>
<td>Hidden</td>
</tr>
<tr>
<td>Created By</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Data.com Key</td>
<td>Hidden</td>
</tr>
<tr>
<td>Description</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Do Not Call</td>
<td>Hidden</td>
</tr>
<tr>
<td>Email</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Email Opt Out</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Fax</td>
<td>Hidden</td>
</tr>
<tr>
<td>Fax Opt Out</td>
<td>Hidden</td>
</tr>
<tr>
<td>Industry</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Invalid Lead</td>
<td>Editable</td>
</tr>
<tr>
<td>Last Modified By</td>
<td>Read-Only</td>
</tr>
<tr>
<td>Last Transfer Date</td>
<td>Hidden</td>
</tr>
<tr>
<td>Lead Owner</td>
<td>Editable</td>
</tr>
<tr>
<td>Lead Source</td>
<td>Hidden</td>
</tr>
<tr>
<td>Lead Status</td>
<td>Required</td>
</tr>
<tr>
<td>Mobile</td>
<td>Hidden</td>
</tr>
</tbody>
</table>

### Field-Level Security:

<table>
<thead>
<tr>
<th>Profile</th>
<th>Field</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Community Login1</td>
<td>Invalid Lead</td>
<td>Visible</td>
</tr>
</tbody>
</table>

**Page Layout:**