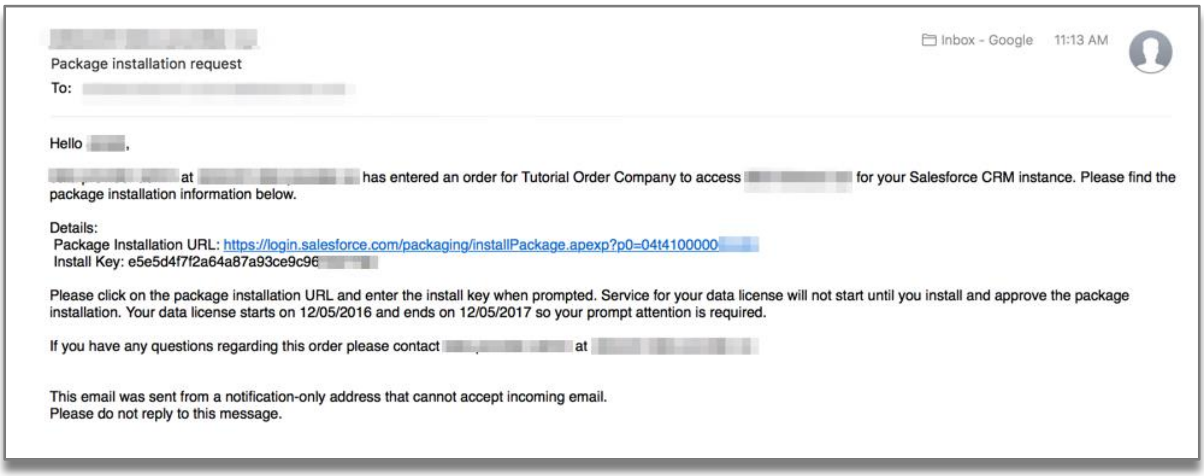
<u>SCOTTS FOR SALESFORCE APP INSTALLATION</u>

1.1 Overview
Objective: successful installation and configuration of data provider's Salesforce package
What you'll need: package installation URL and install key from order email
Salesforce user with admin permissions
Estimated time to complete: 15-20 minutes

1.2 Install the Package

- Click the link found in the new order email

NOTE: *If you are installing into a* ***sandbox*** *organization you must replace the initial portion of the URL with http://test.Salesforce.com*



Inbox - Google 11:13 AM

Package installation request

To: [illegible]

Hello [illegible],

[illegible] at [illegible] has entered an order for Tutorial Order Company to access [illegible] for your Salesforce CRM instance. Please find the package installation information below.

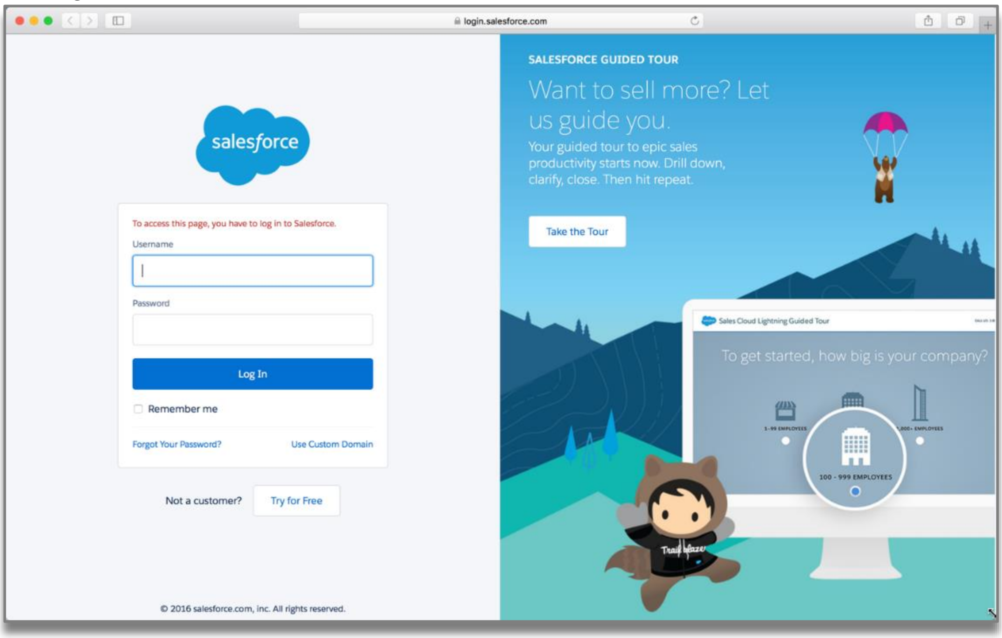
Details:
Package Installation URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4100000[illegible]
Install Key: e5e5d4f7f2a64a87a93ce9c96[illegible]

Please click on the package installation URL and enter the install key when prompted. Service for your data license will not start until you install and approve the package installation. Your data license starts on 12/05/2016 and ends on 12/05/2017 so your prompt attention is required.

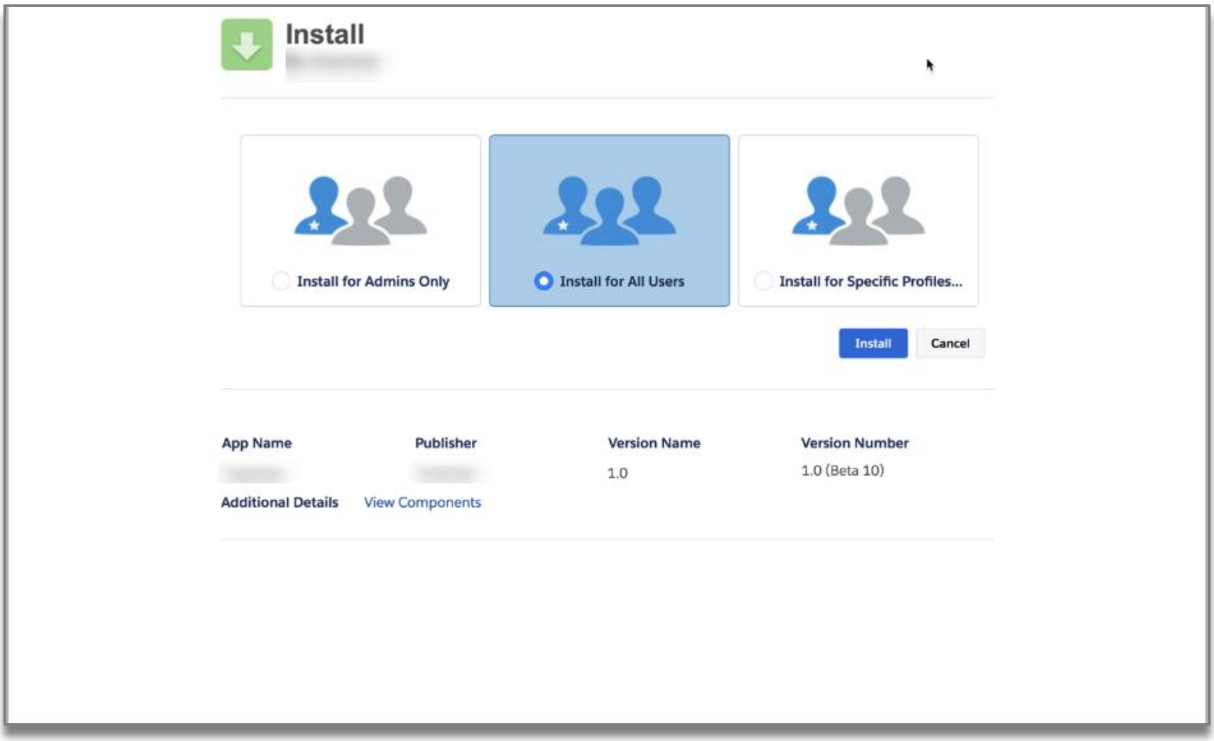
If you have any questions regarding this order please contact [illegible] at [illegible]

This email was sent from a notification-only address that cannot accept incoming email.
Please do not reply to this message.

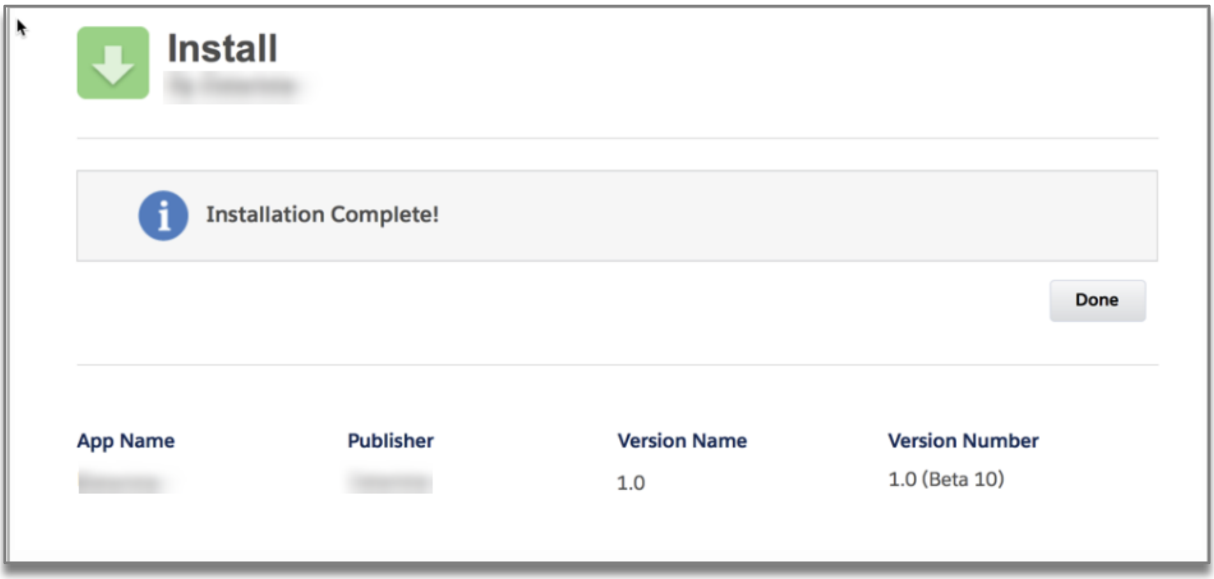
- Log in to Salesforce as an Admin User



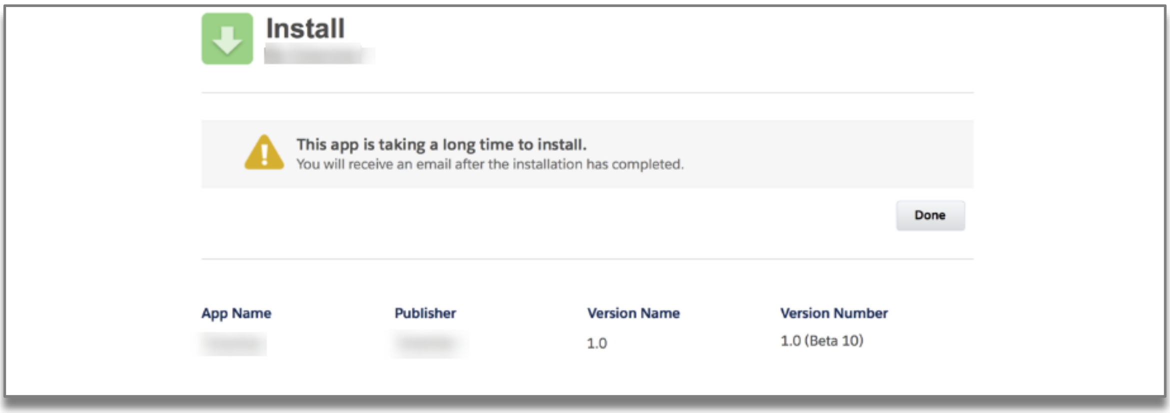
- Install for all users



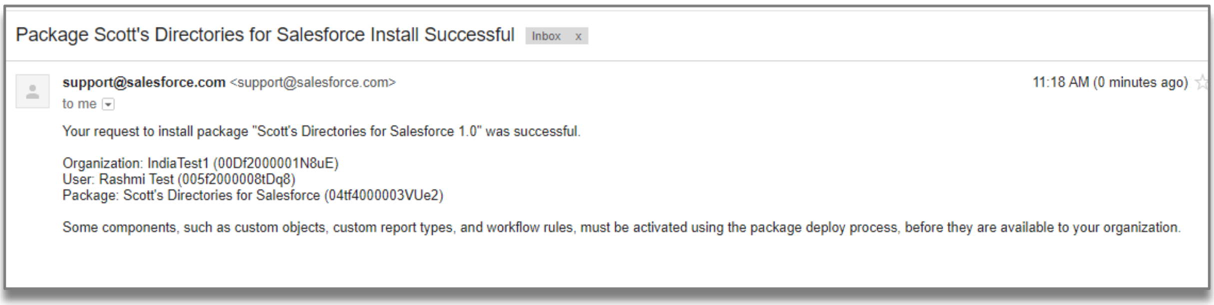
- Wait for package installation to complete
- **Click Done**



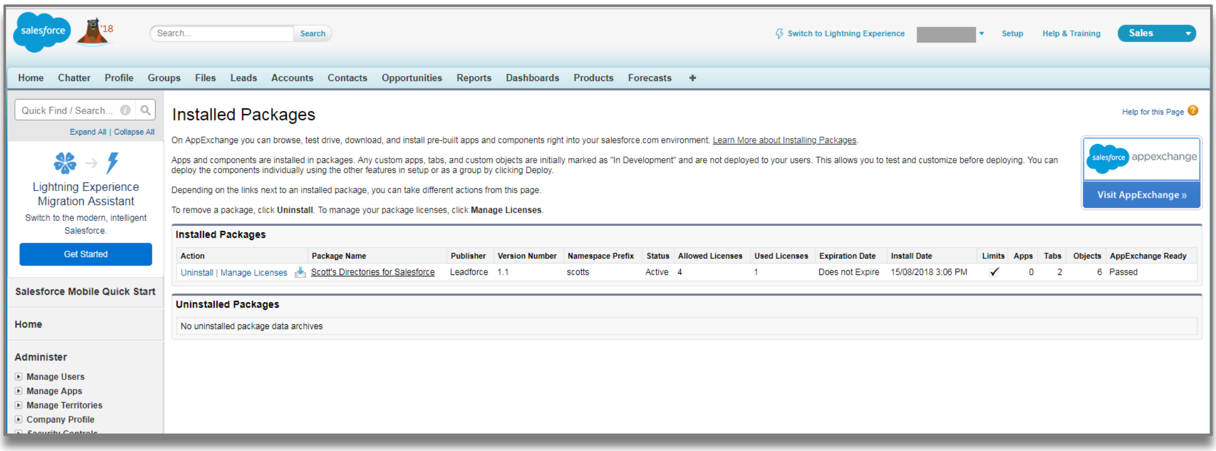
NOTE: *If Salesforce is busy this can take a while.*



▶ The Admin User who initiated the installation will receive an email when it is complete

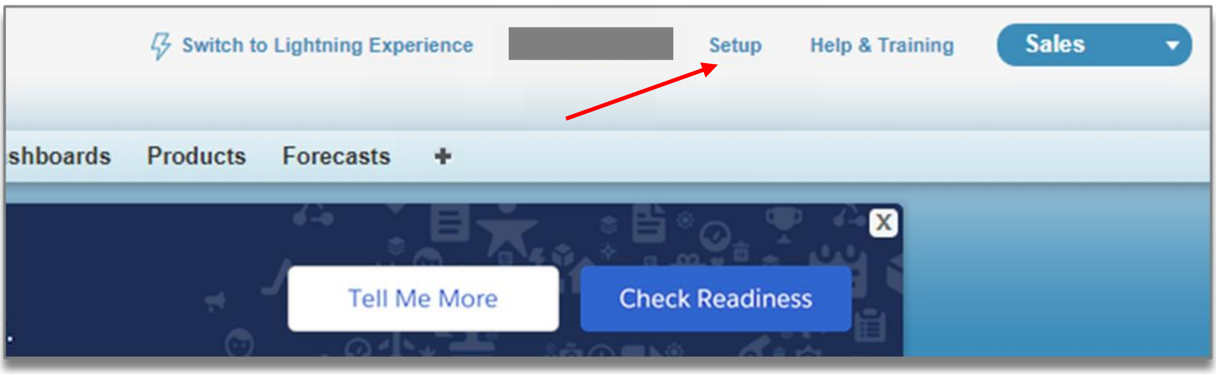


▶ This is what your screen will look like.



1.3 Setup

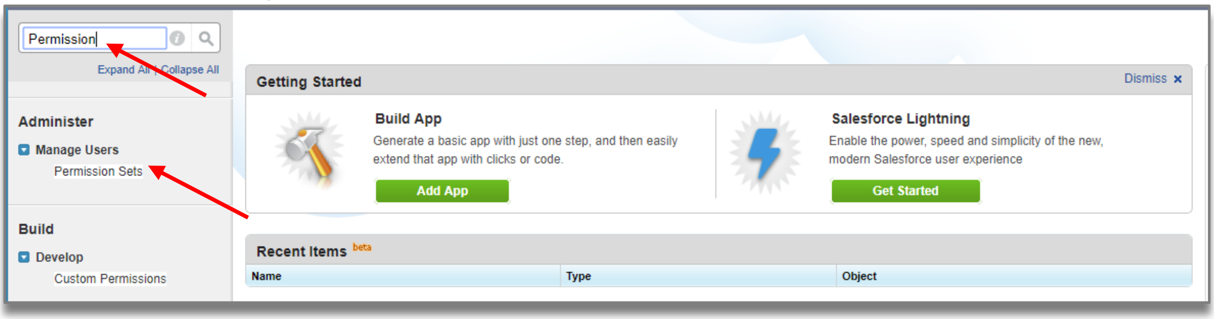
▶ **Click Setup** in the top right corner of Salesforce.



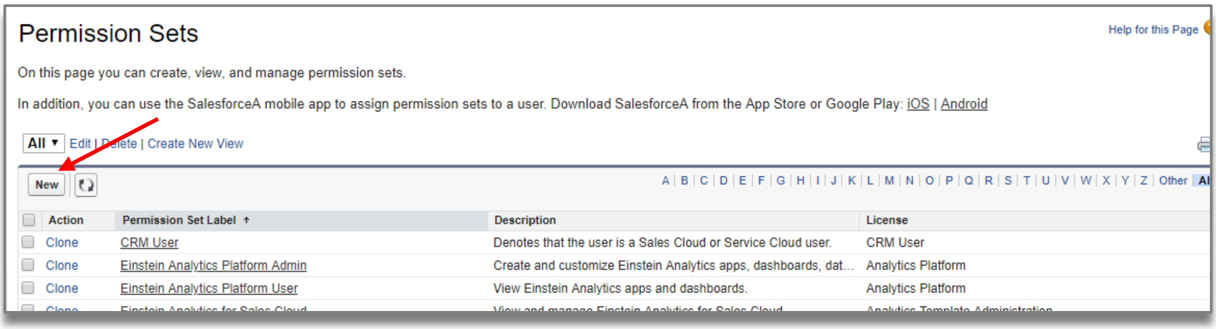
***NOTE:** From this point forward in the tutorial if you get lost or confused you can always get back to a clean slate by returning to **Setup**. All remaining tasks will be completed in the Admin section of Salesforce.*

1.4 Create a Permission Set

- **Type** "Permission" into the **Quick Find / Search** box.
- **Click** on the **Manage Users** -> **Permission Sets** link.

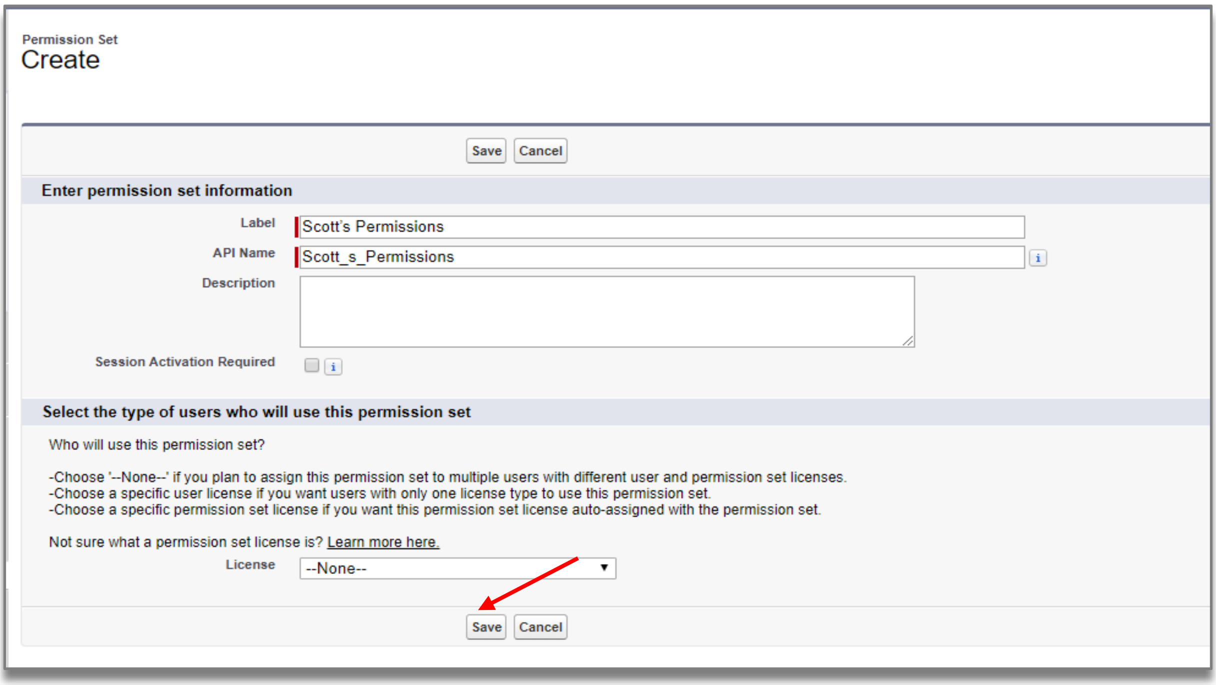


- **Click** the **New** button.

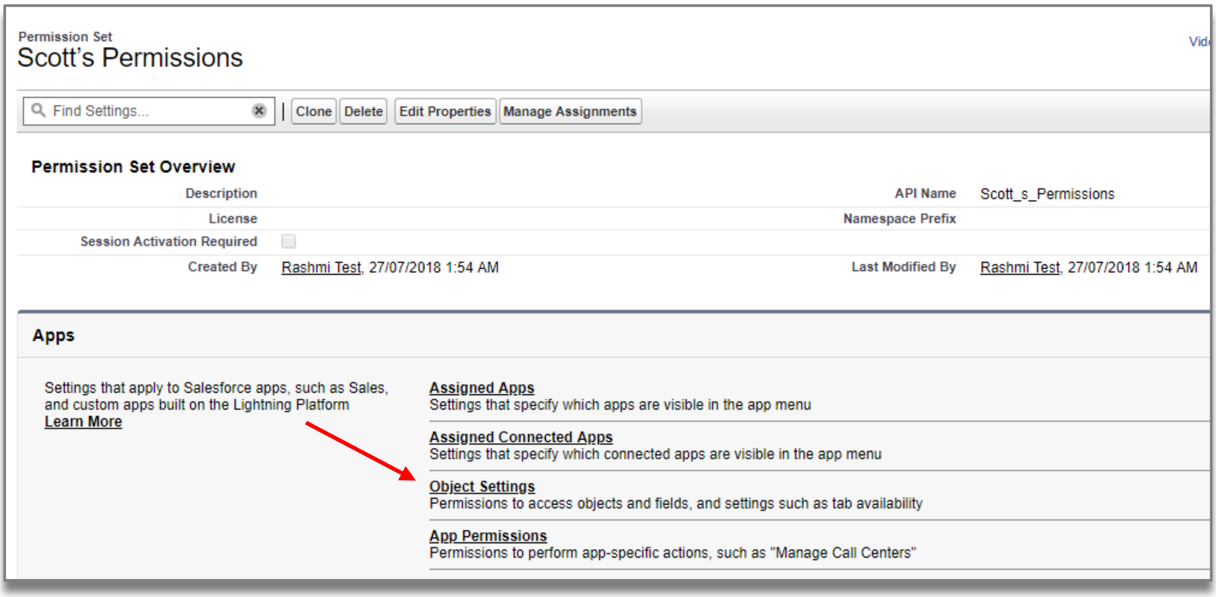


- **Type** "Scott's Permissions" for the permission set in the **Label** field. Salesforce will automatically populate the **API Name** field.

- **Click** the **Save** button.

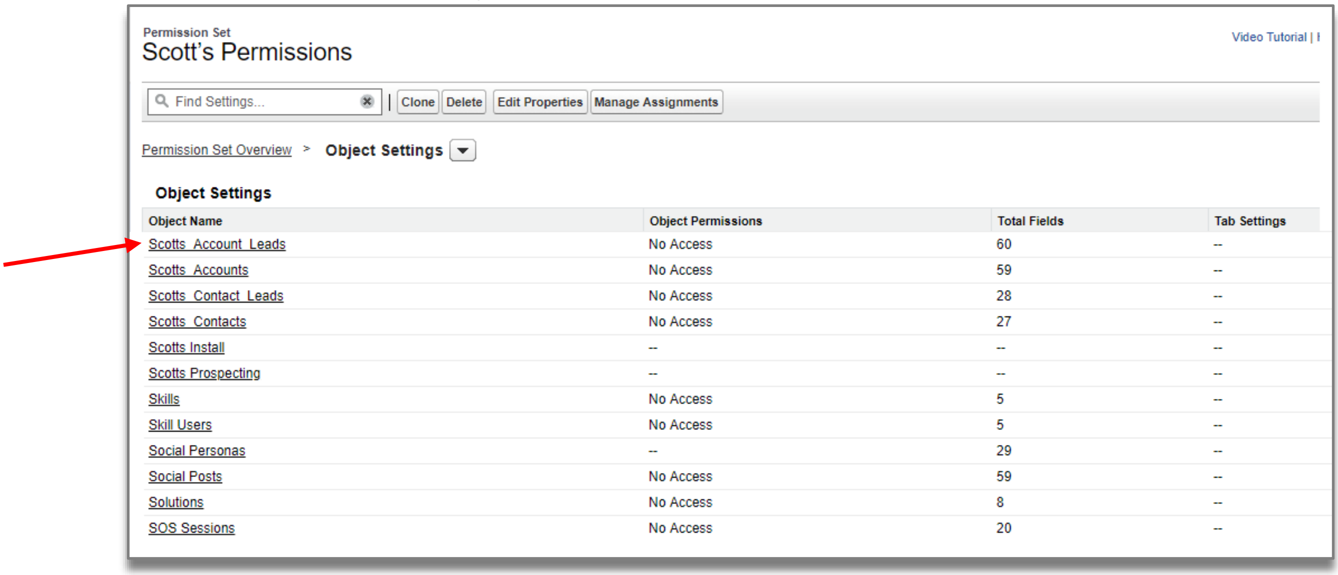


- **Click** the **Object Settings** link.

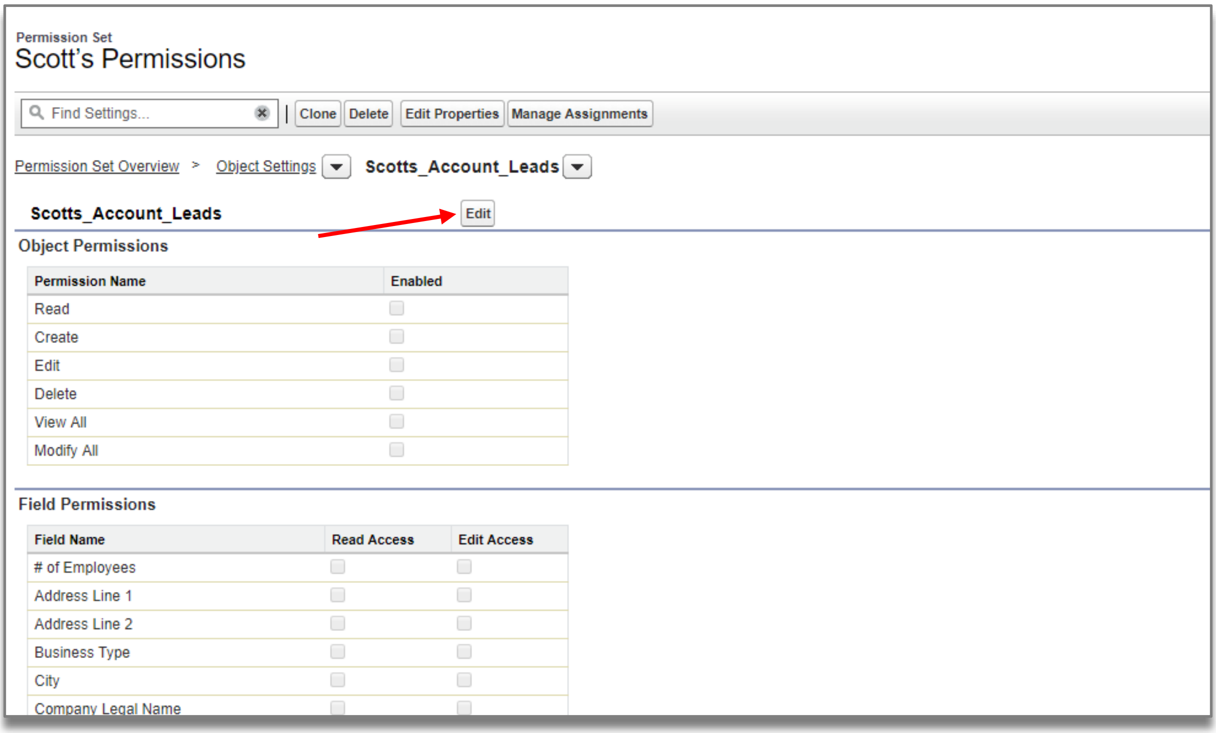


***NOTE:** The following steps will have to be repeated for **all** custom objects. Please talk to your sales rep to obtain the list of custom objects.*

- Scroll through the list of **Objects** to find the Scott's objects.
- Click on the first Scott's object.

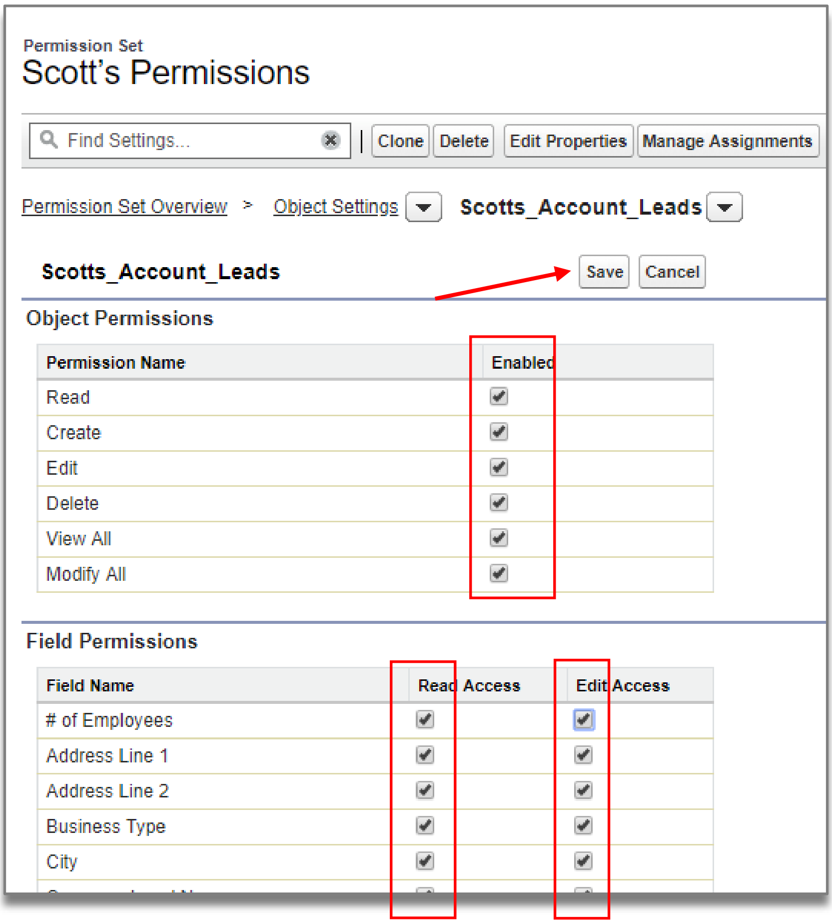


▶ **Click** the **Edit** button.



▶ Check **all** checkboxes. Then **Click** the **Save** button.

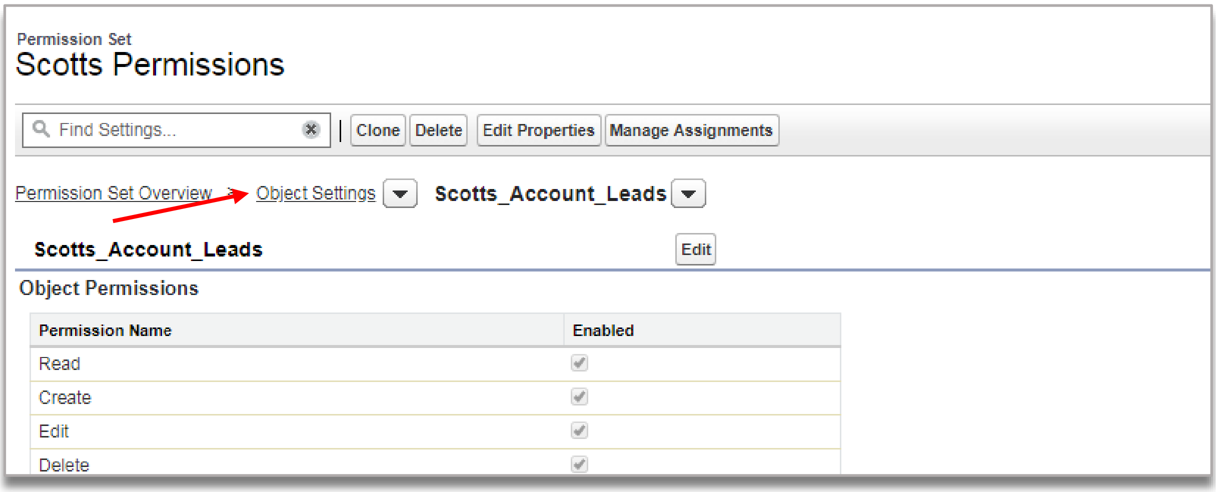
TIP: *If you check the* ***Edit Access*** *checkboxes it will automatically check off the* ***Read Access*** *boxes.*



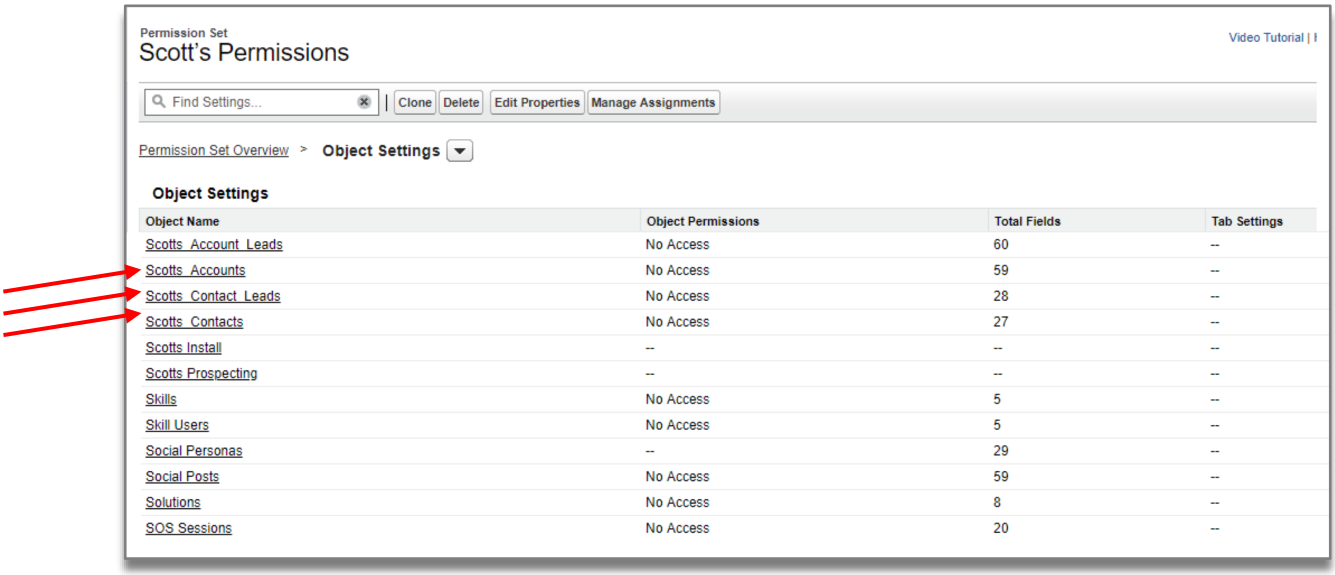
NOTE: *For custom objects with many fields, this step is tedious. For more advanced users copy and paste the following Javascript into your browsers developer's console:*

```
var allInputs = document.getElementsByTagName("input");for(var i =0, max =
allInputs.length; i < max; i++) {if(allInputs[i].type ==='checkbox')
allInputs[i].checked = true;   }
```

- Repeat the above steps for all other custom objects associated with the package that is being installed, by going back to Object Settings.

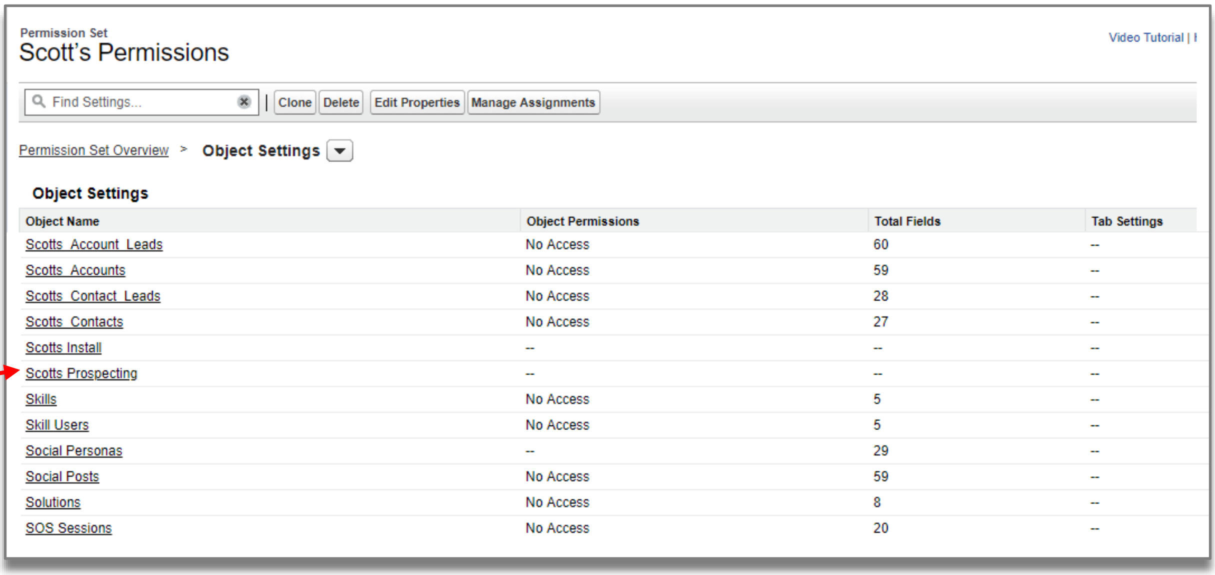


- Other custom objects may include accounts, custom contact or lead objects, Scotts Install and Scotts Prospecting.



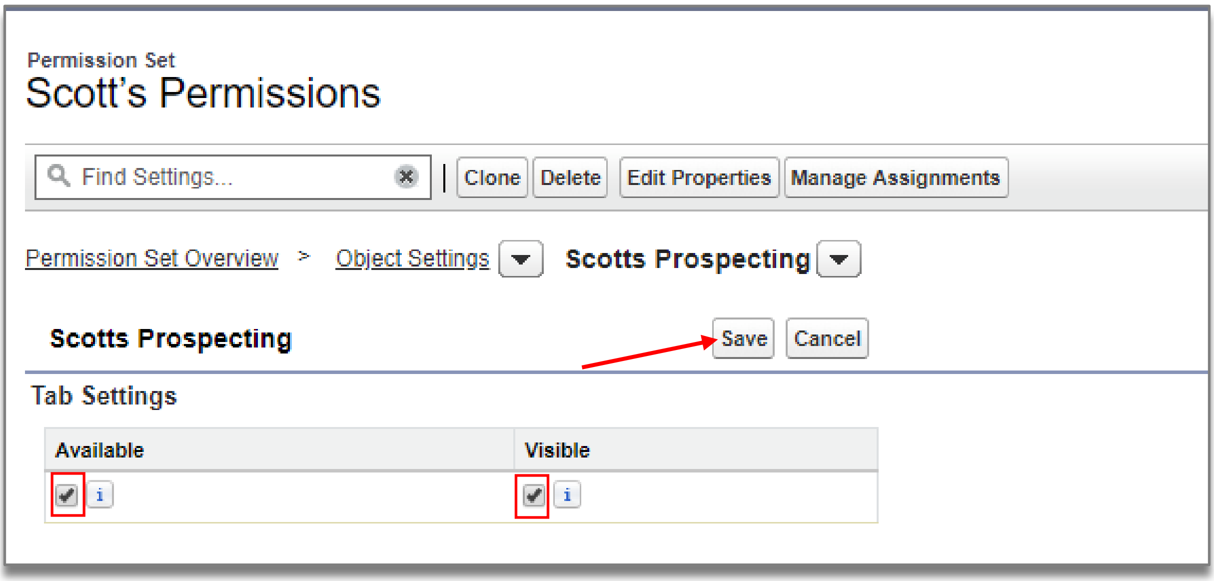
1.5 Enable the Prospecting Tab

- On the **Permission Set** page search for "prospecting" then select that custom object.



Object Name	Object Permissions	Total Fields	Tab Settings
Scotts_Account_Leads	No Access	60	--
Scotts_Accounts	No Access	59	--
Scotts_Contact_Leads	No Access	28	--
Scotts_Contacts	No Access	27	--
Scotts Install	--	--	--
Scotts Prospecting	--	--	--
Skills	No Access	5	--
Skill Users	No Access	5	--
Social Personas	--	29	--
Social Posts	No Access	59	--
Solutions	No Access	8	--
SOS Sessions	No Access	20	--

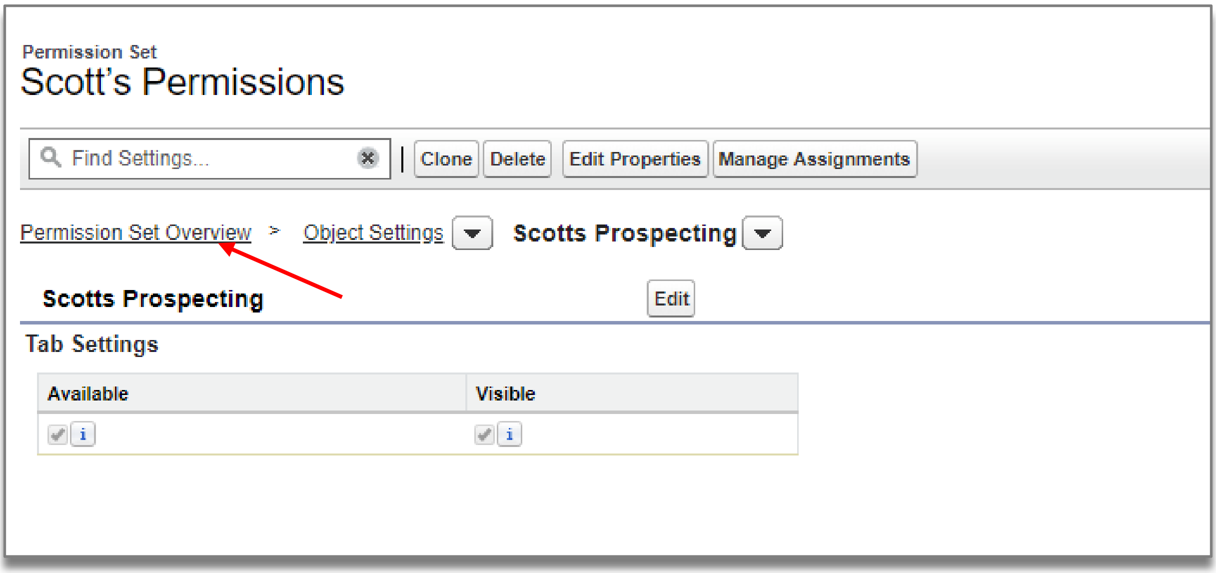
- **Click** the **Edit** button.
- **Check** both **Available** and **Visible**
- **Click** the **Save** button.



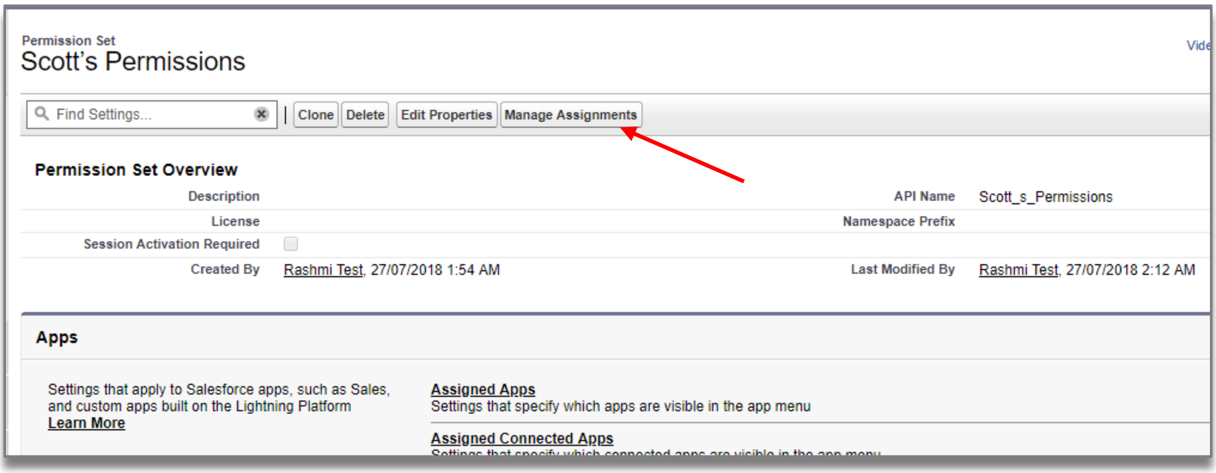
SCOTT'S DIRECTORIES

1.6 Assign the Permission Set

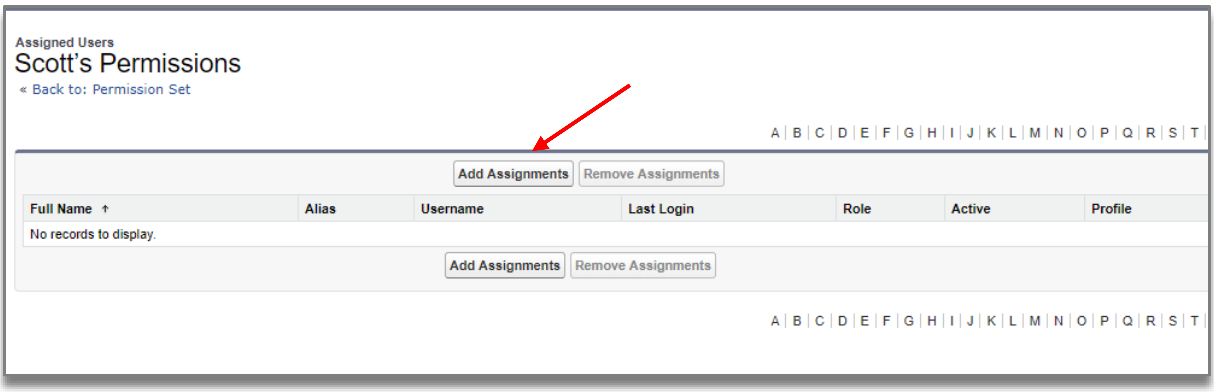
- **Click** the **Permission Set Overview** link.



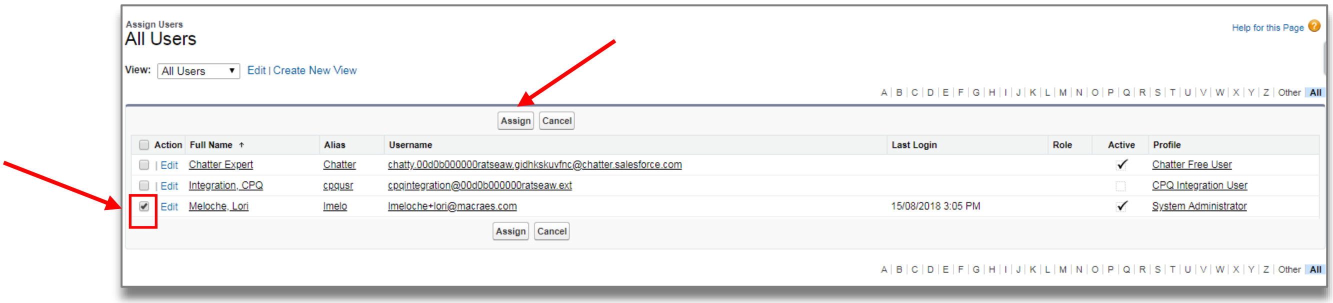
- **Click** the **Manage Assignments** button.



- **Click** the **Add Assignments** button.



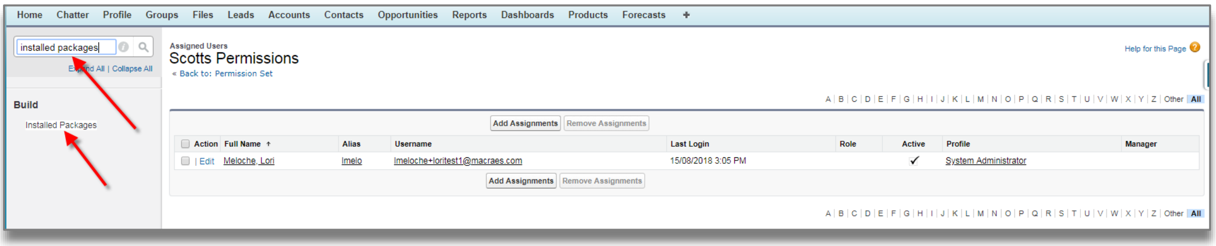
- Select the checkbox next to your user.
- **Click** the **Assign** button.



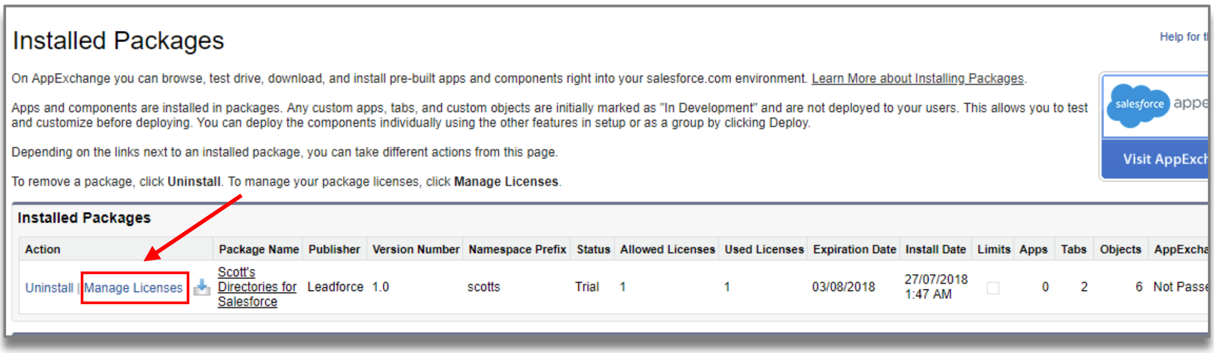
1.7 Manage licenses

NOTE: *You will need to give each user a license in order for the user to access the package. If you do not assign the user in manage licenses, they will not be able to access the package, and an error message will not display. They will simply not see any of the packages components.*

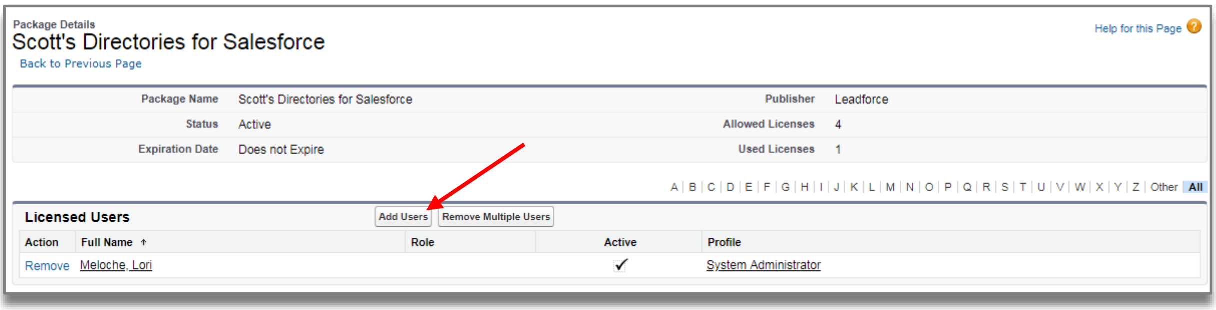
- **Type** “installed packages” into the **Quick Find / Search** box. (Do not press Enter).
- **Click** on the -> **Installed Packages** link.



- **Click** the **Manage Licenses** link next to the package name.

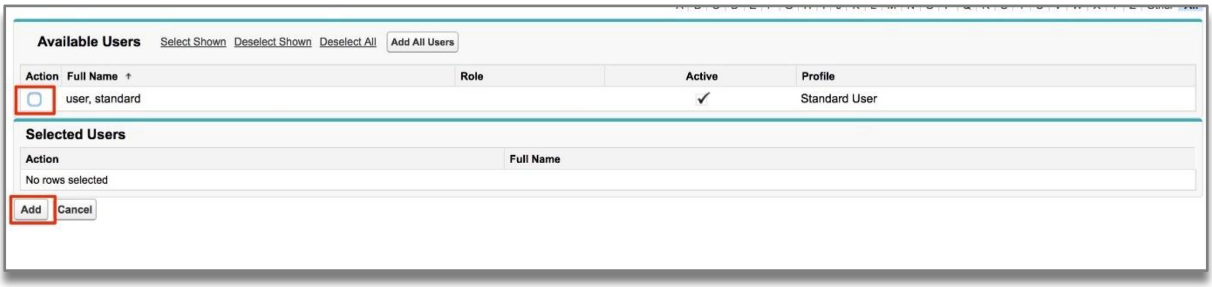


- **Click** the **Add Users** button.



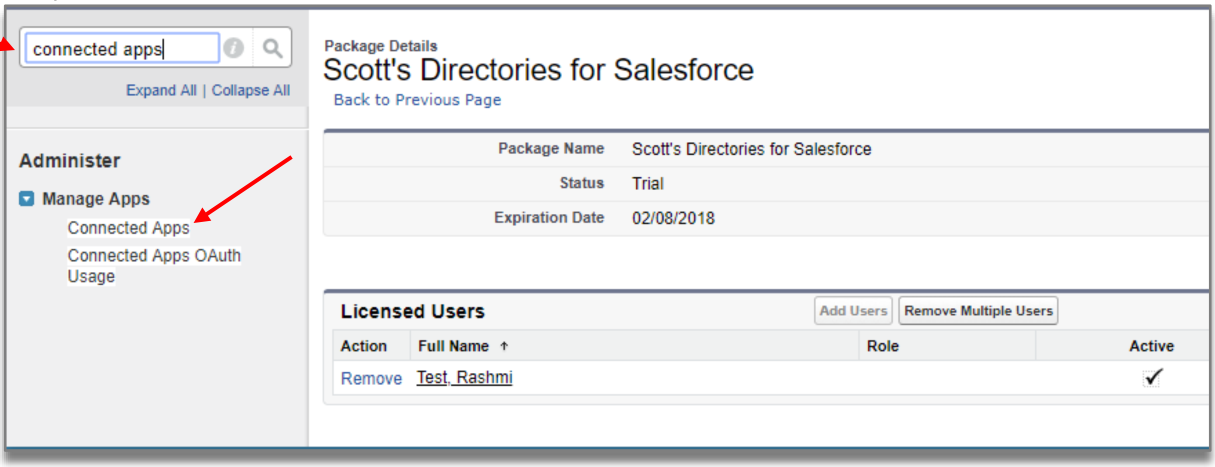
- Select the checkbox next to your user. (There may be a slight delay until your name shows up).

- **Click** the **Add** button.

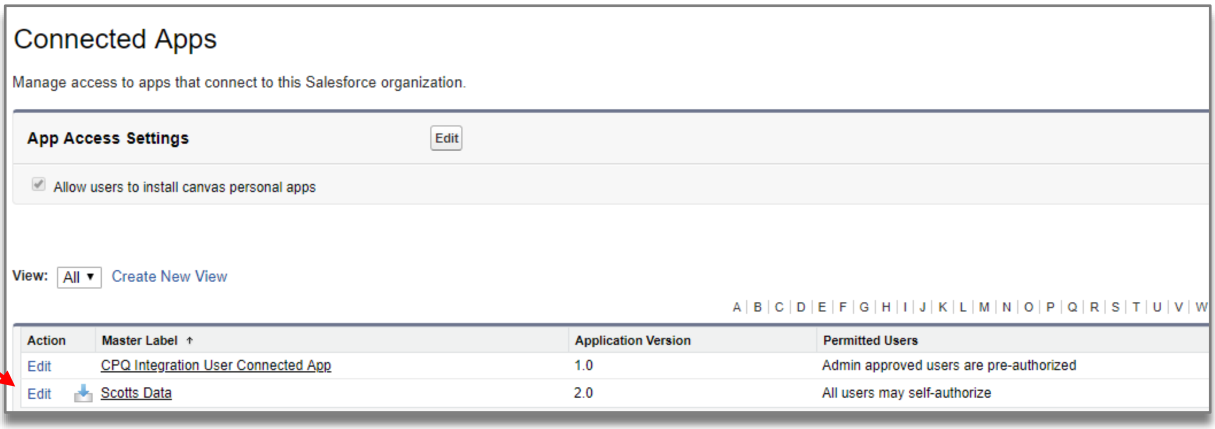


1.8 Configure Connected App Permissions

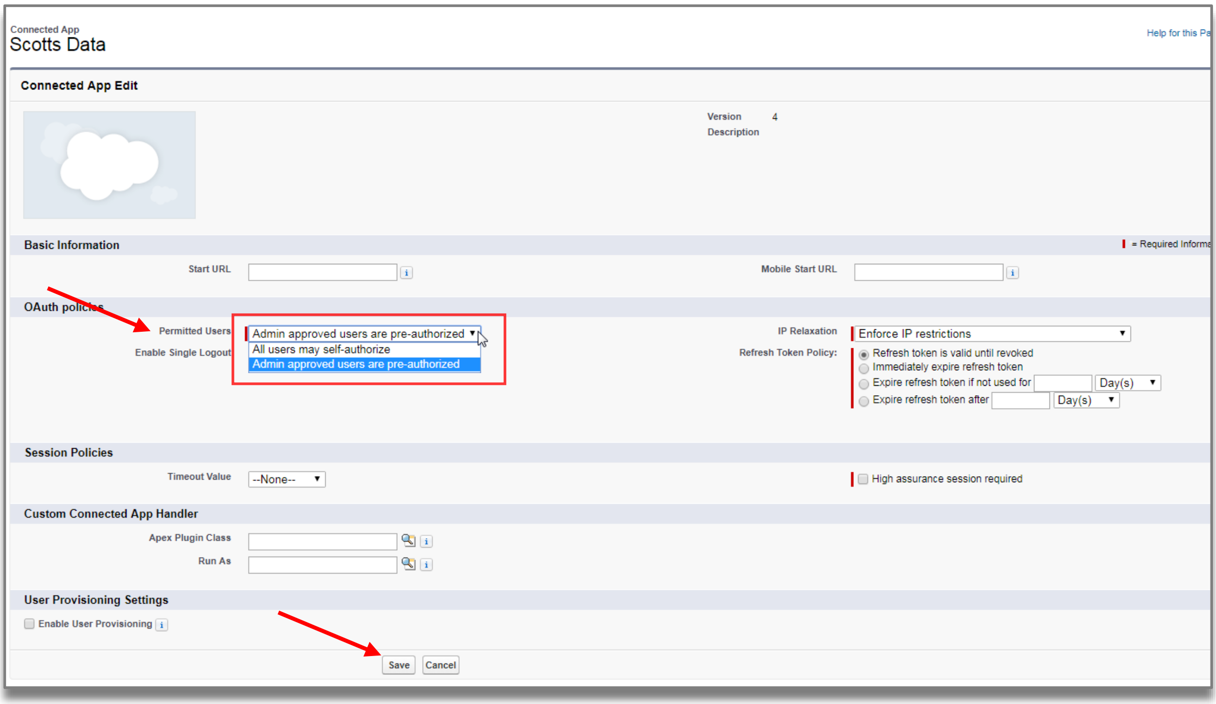
- **Search** for “connected apps” and then **Click Manage Apps -> Connected Apps** (Do not press Enter).



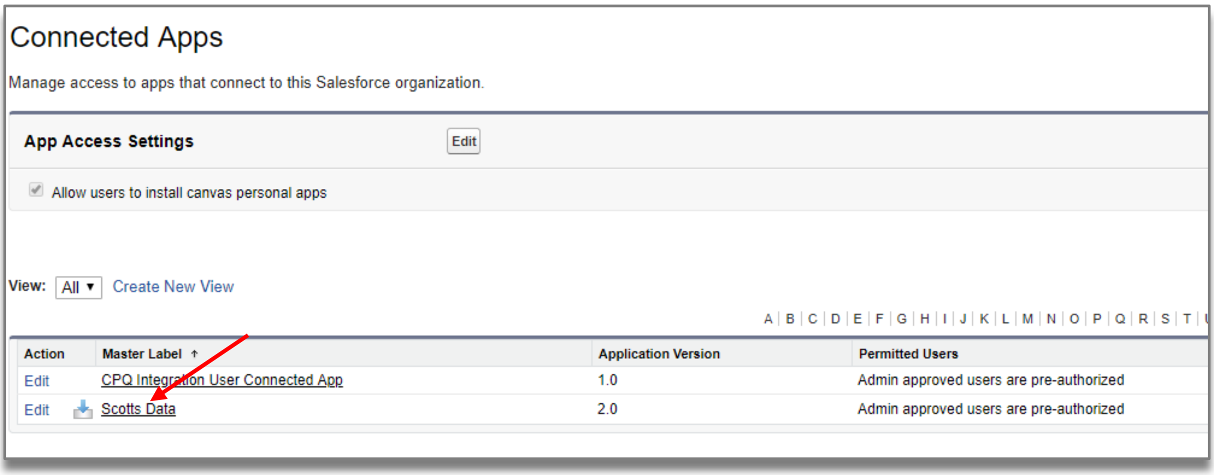
- **Click** the **Edit** link for the appropriate connected app. Example: Scott’s Data.



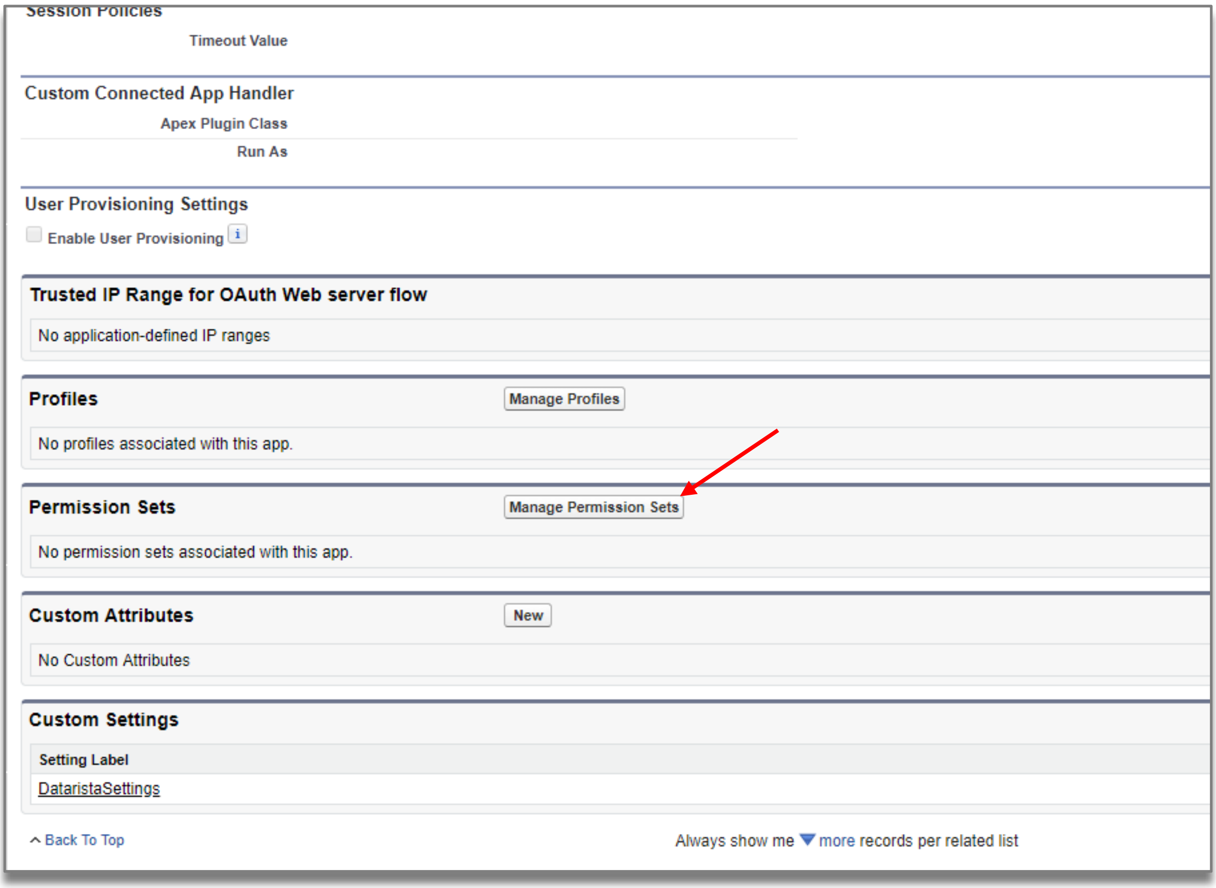
- Under “permitted users”, select “admin approved users are pre-authorized”
- **Click** the **Save** button.



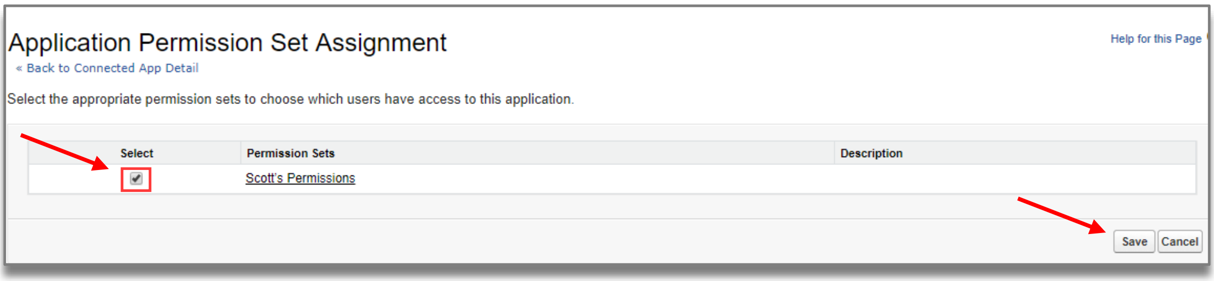
- **Click** on the **Master Label** link for the connected app – **Scott’s Data**.



- Scroll down to the Permission Sets section, **Click** the **Manage Permission Sets** button.

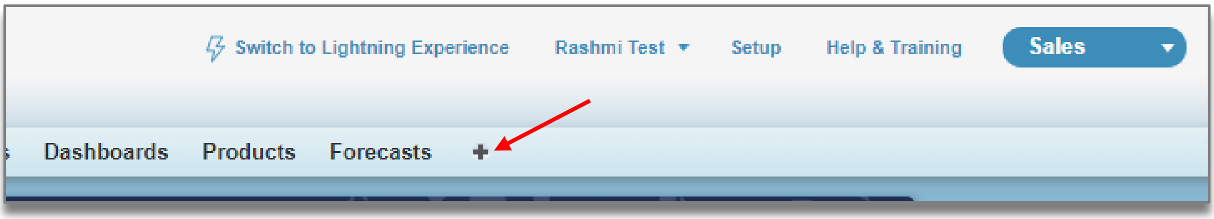


- Select the checkbox next to your permission set ("Scott's Permissions")
- **Click** the **Save** button.

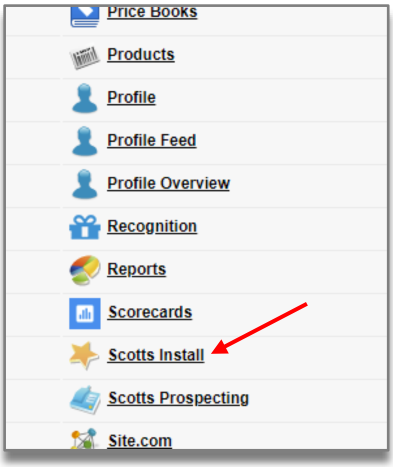


1.9 Authenticate Installation Key

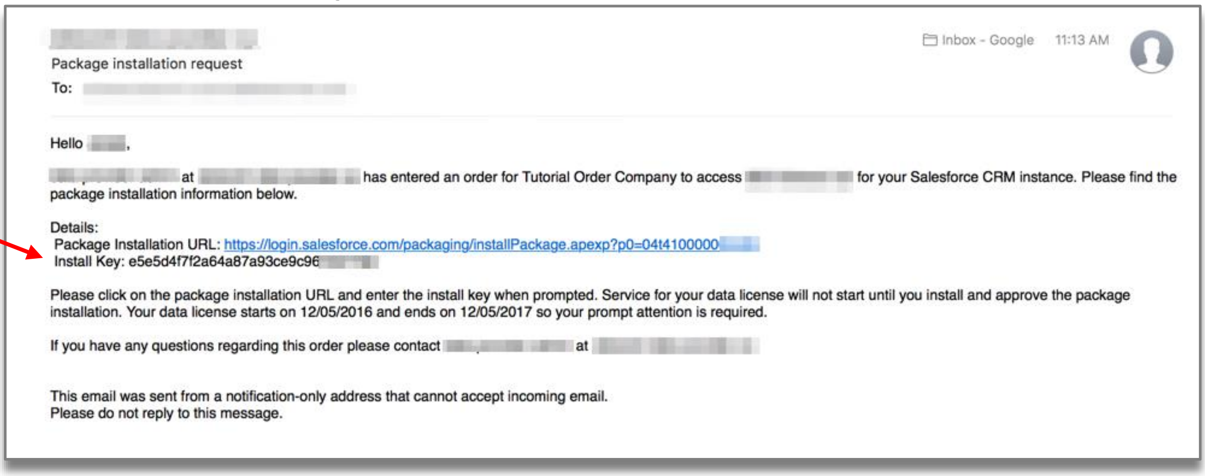
- **Click** the + on the top right of the Salesforce navigation.



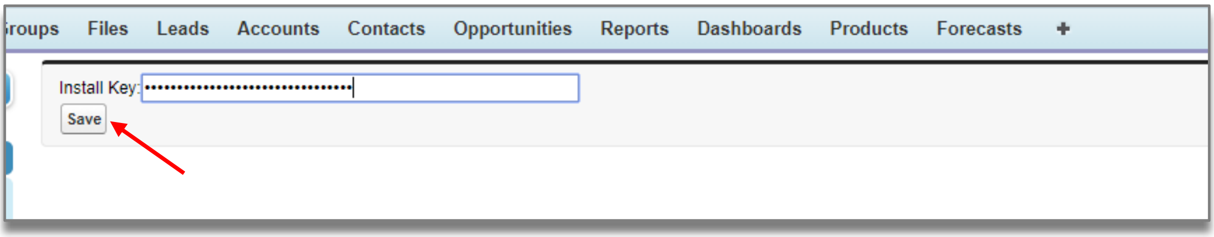
- Under **All Tabs** scroll down and **Click** the **Scott's Install** link.



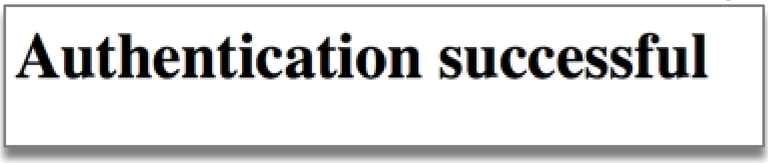
- Enter the **installation key** from the order email.



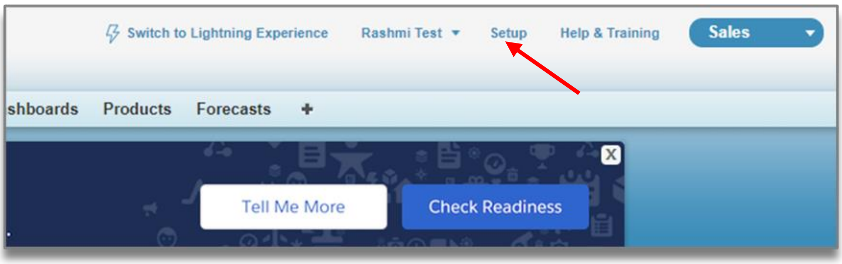
- **Click** the **Save** button.



- You should receive an "Authentication Successful" message. If not, check your install key.



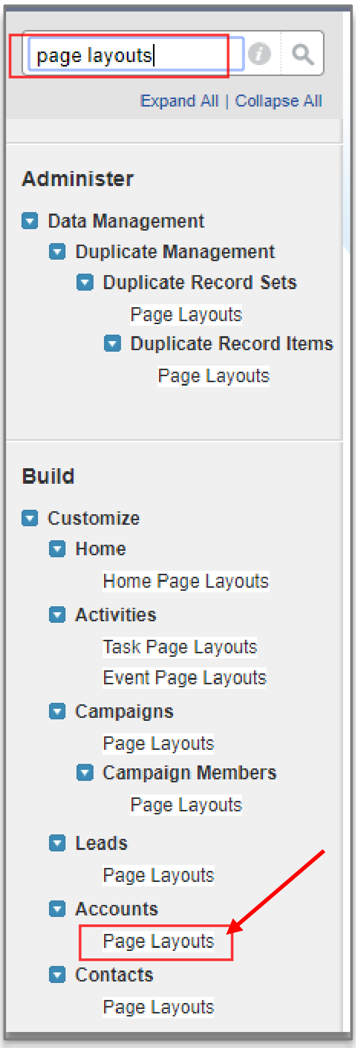
- Close the Authentication successful tab, return to Salesforce setup page.



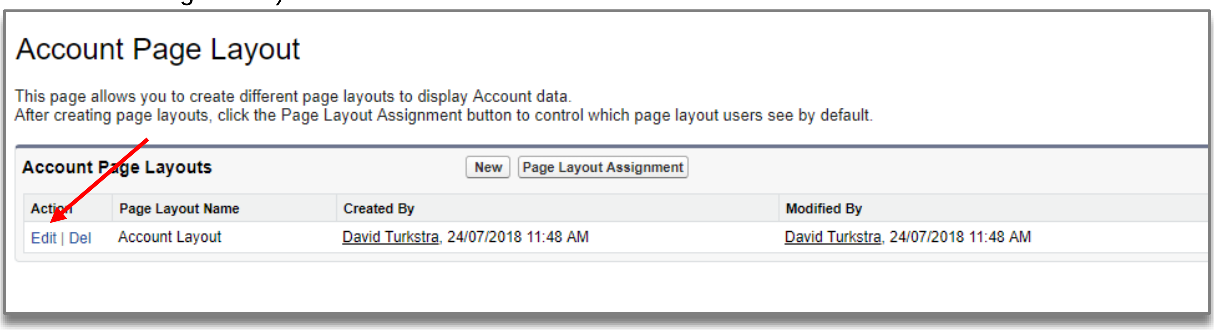
1.10 Configure Page Layouts

NOTE: *You will need to configure a layout for each object that is being added / modified to the Salesforce instance. This likely includes an account and contact object. Perform the following steps for each Salesforce page that requires updating.*

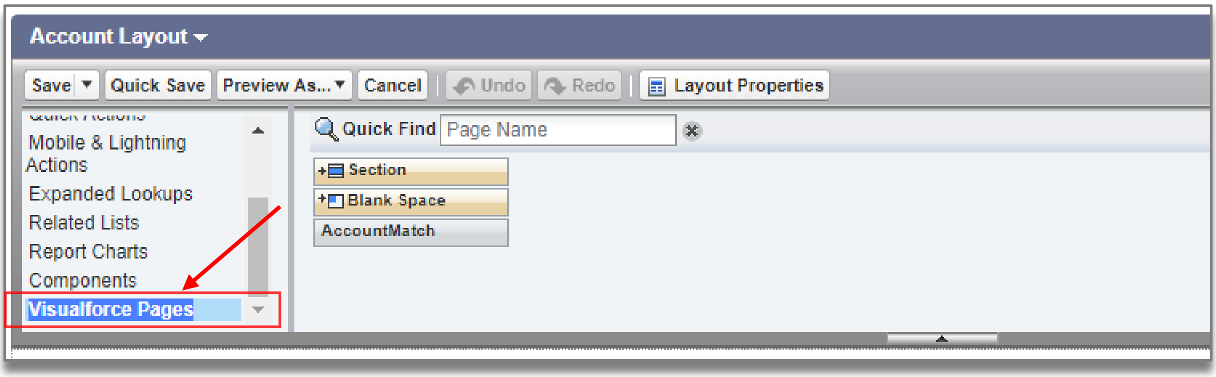
- **Type** “page layouts” into the **Quick Find / Search** box. (Do not press Enter).
- **Click** on the **Accounts -> Page Layouts** link.



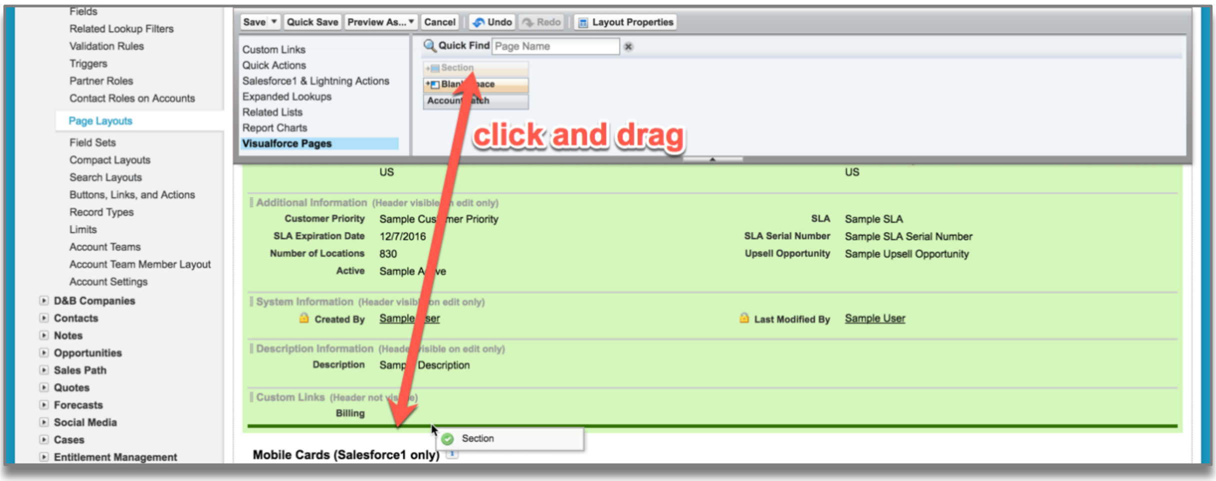
- **Click** the **Edit** link next to **Account Layout** (other layouts may be in use, depending on Salesforce configuration)



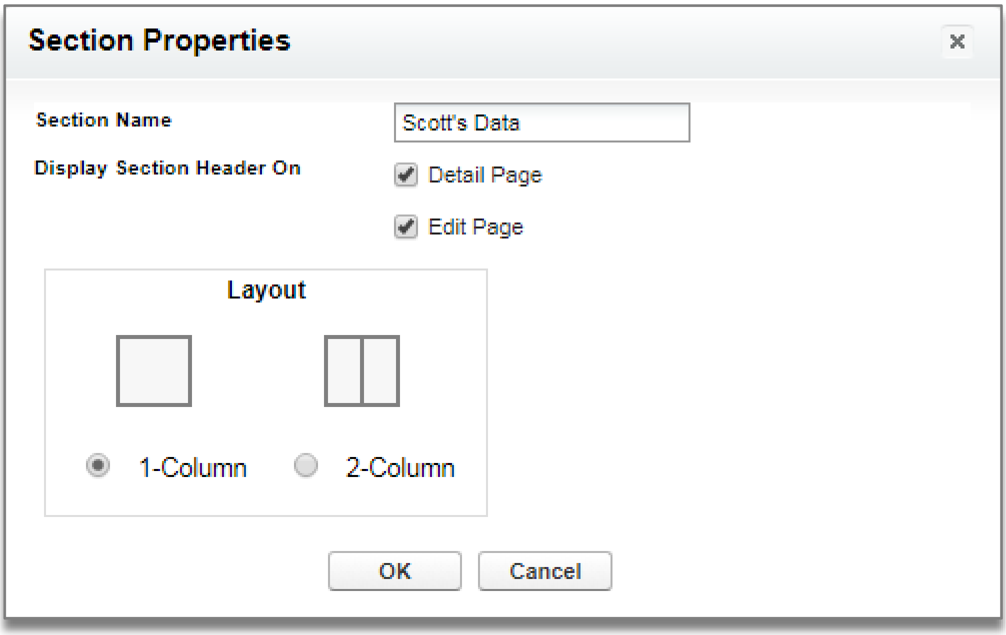
- On the top left selection list **Click Visualforce Pages**



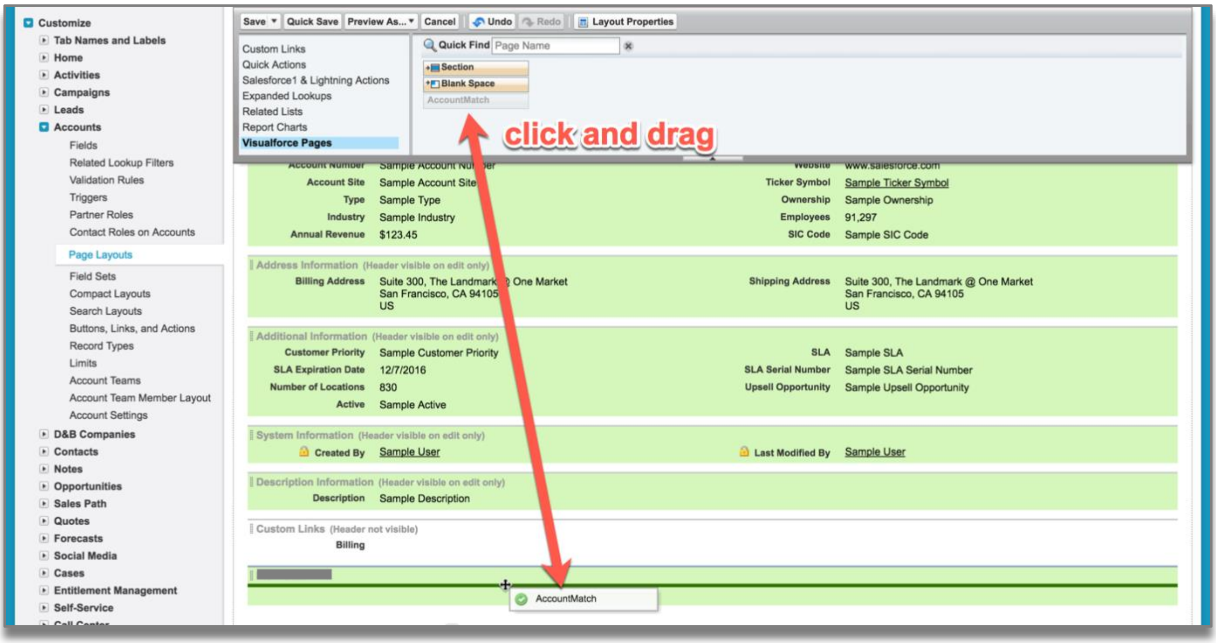
- Create a new section: Drag “Section” from the top to the layout below, place it below “Custom Links”



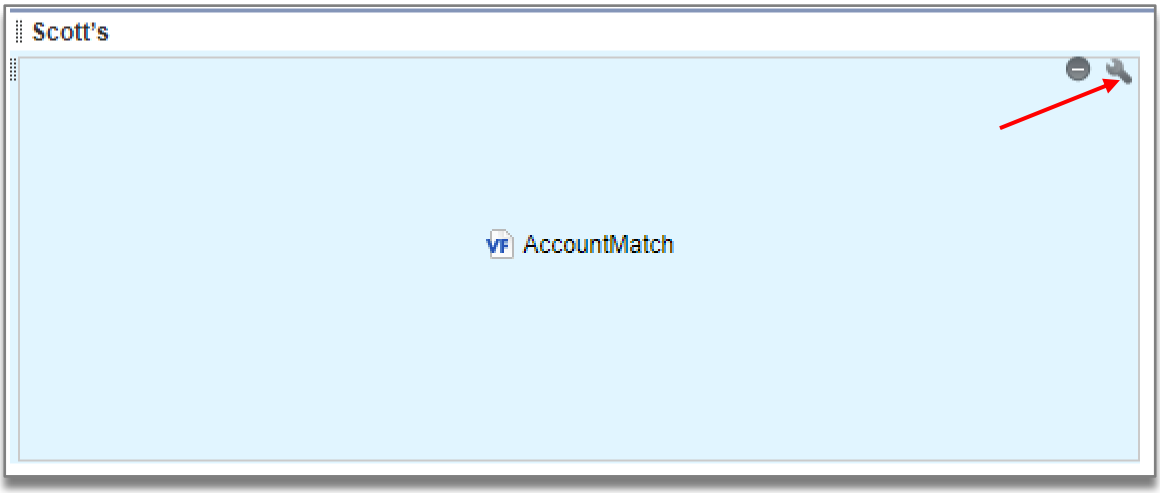
- Enter the **Name** for the section – Scott’s Data
- **Select 1-Column**
- **Click** the **OK** button.



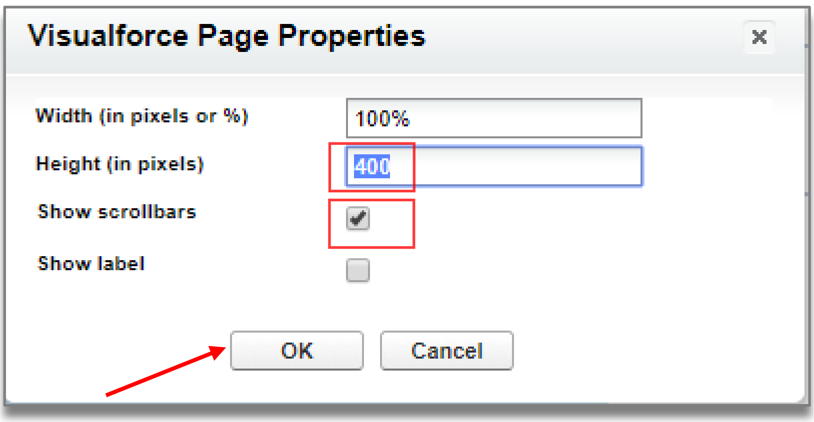
- **Click** and **Drag AccountMatch** into the newly created section.



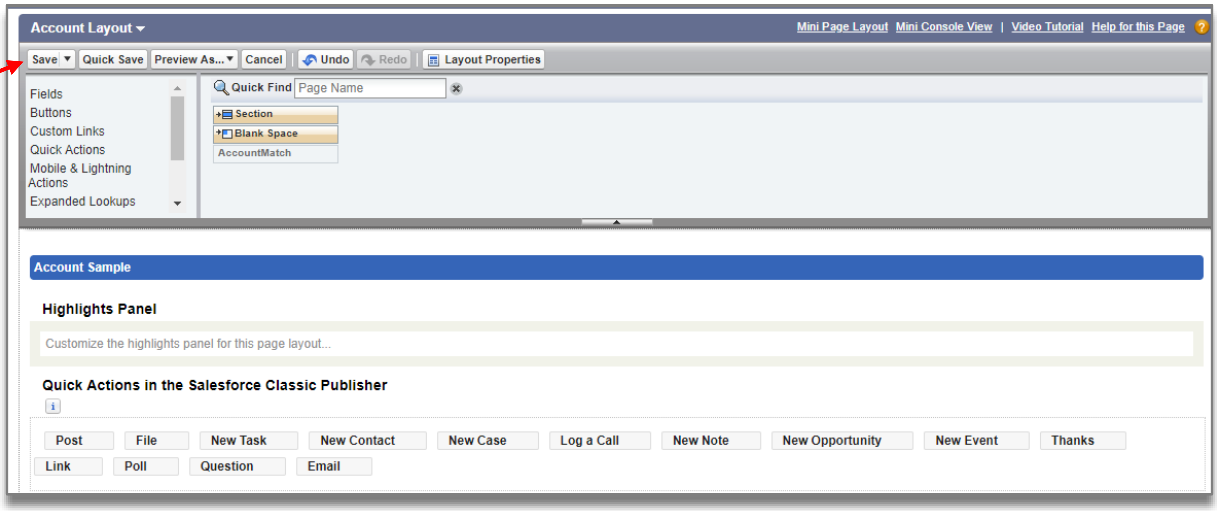
- Move the mouse to the top right of the "AccountMatch" page area. A wrench icon (properties) should appear.
- **Click** the wrench.



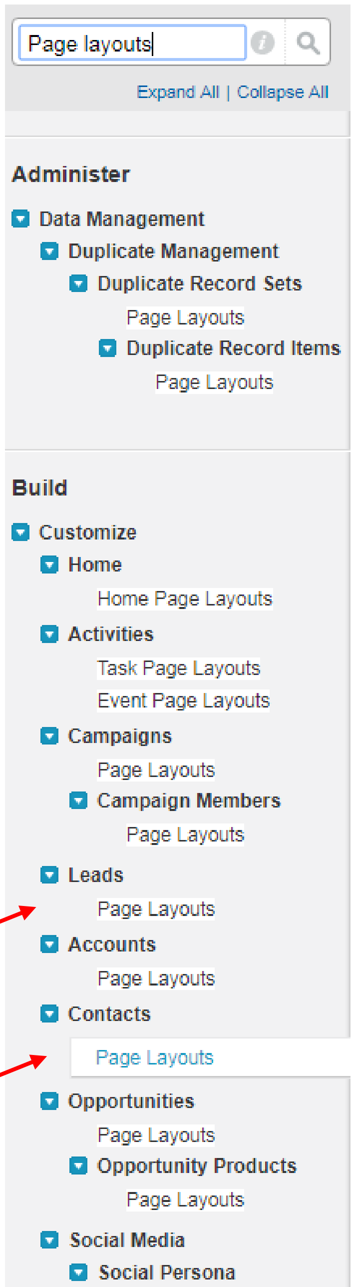
- Change the **Height** to at least **400**
- **Check** Show Scrollbars (optional)
- **Click** the **OK** button.



- **Click** the **Save** button located at the top of the control widget.

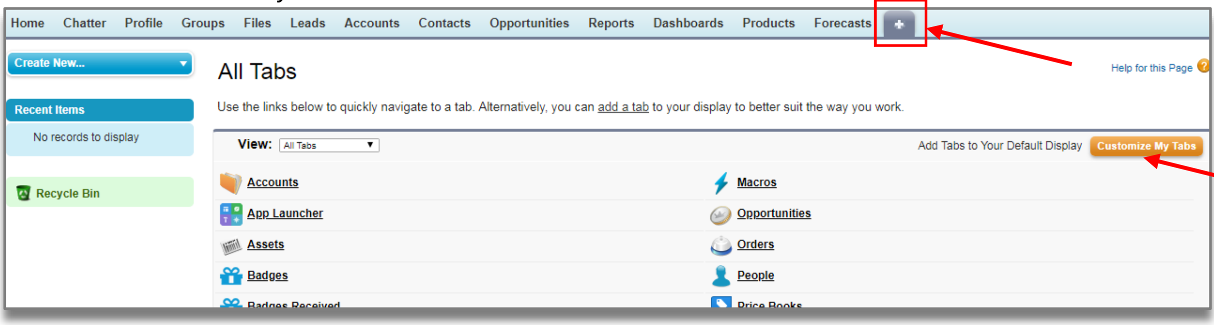


NOTE: *Repeat the previous steps in 1.10 for other Salesforce Objects that are being modified, most likely Contacts and Leads.*

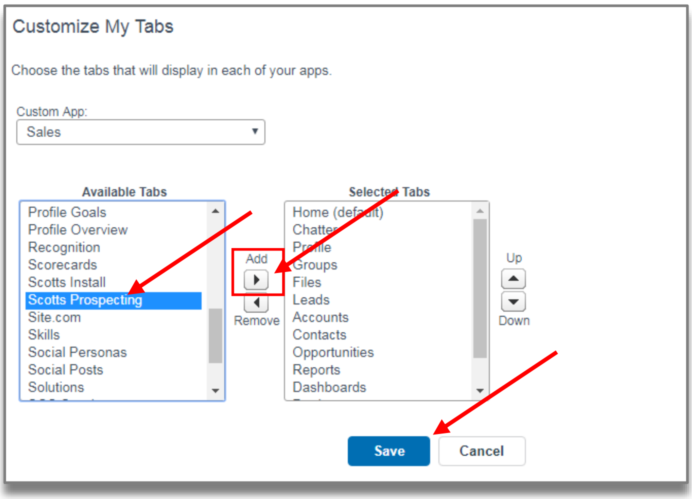


1.11 Enable Prospecting Tab (Optional)

- **Click** the **"+"** on the top right of the Salesforce navigation
- **Click** "Customize My Tabs"



- Under "Available Tabs" select the "Scotts Prospecting" tab under the Available Tabs list.
- **Click** the right arrow to add it to the Selected Tabs list
- **Click "Save"**



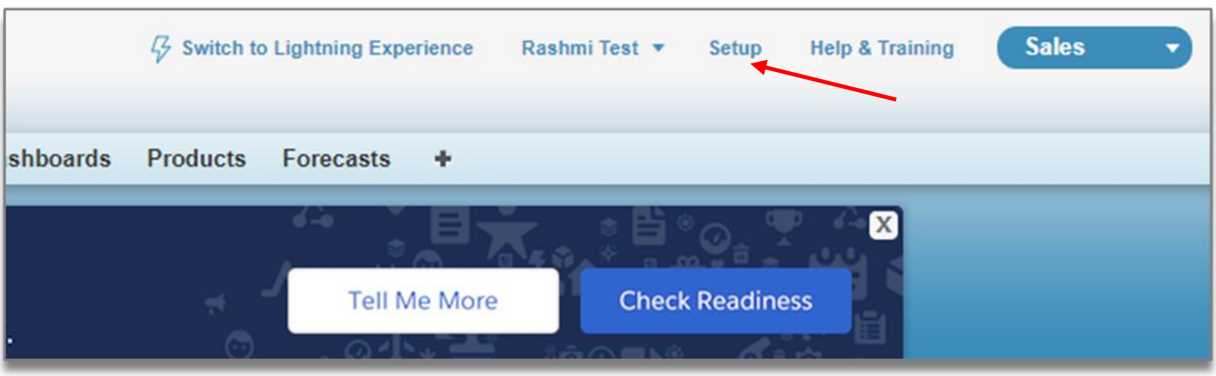
The tab will now appear in the Salesforce top navigation

1.12 Disable Duplicate Detection

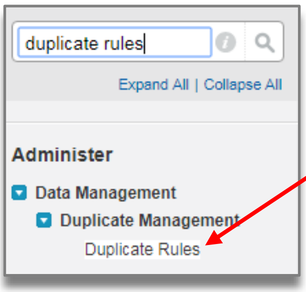
Salesforce provides standard duplicate rules for business and person accounts, contacts, and leads. A duplicate rule defines what happens when a user views a record with duplicates or starts creating a duplicate record. The default Salesforce duplicate rules may be too strict, and may interfere with prospecting similar records.

The user has two options: (1) disable duplicate detection for all users or (2) disable duplicate detection for only the user who installed the package (this is the user new fields will be added as)

- **Click Setup**

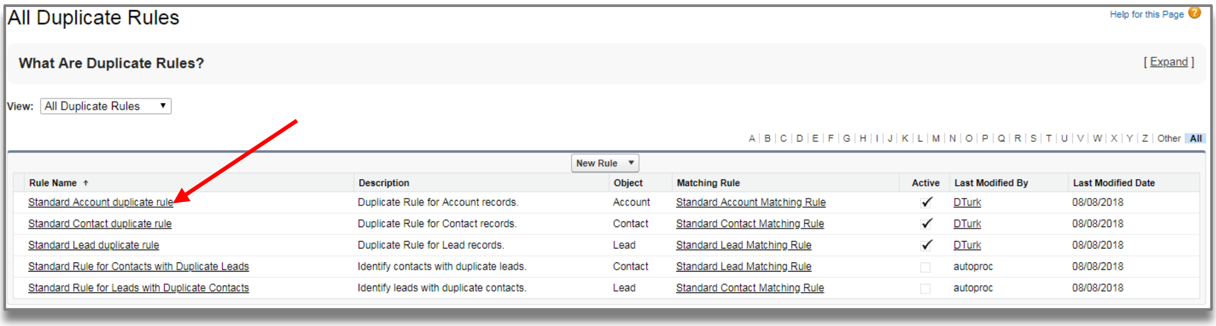


- Type “duplicate rules” into **Quick Find / Search** box. (Do not press Enter).
- **Click Duplicate Rules** which is located under “Duplicate Management”

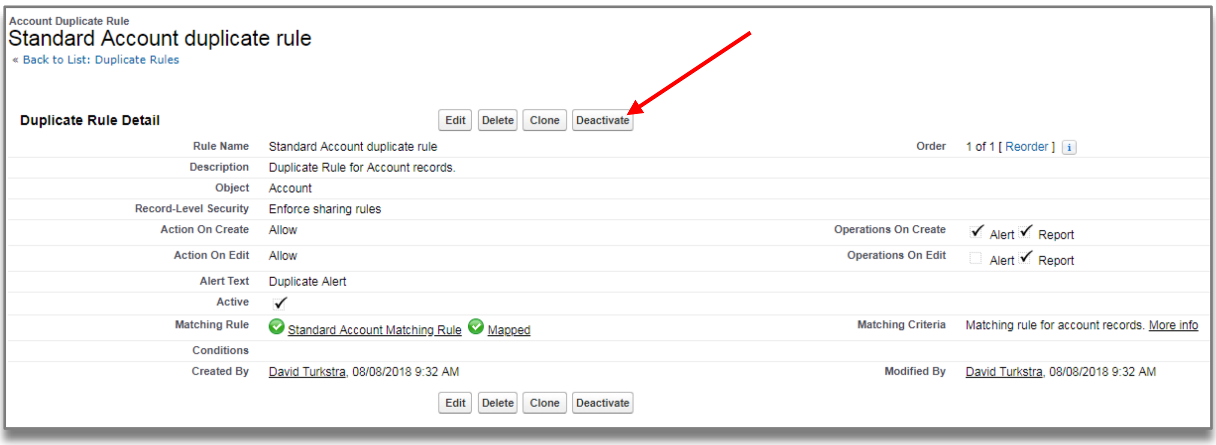


1) Disable for All Users

- For each duplicate rule, click the rule name link

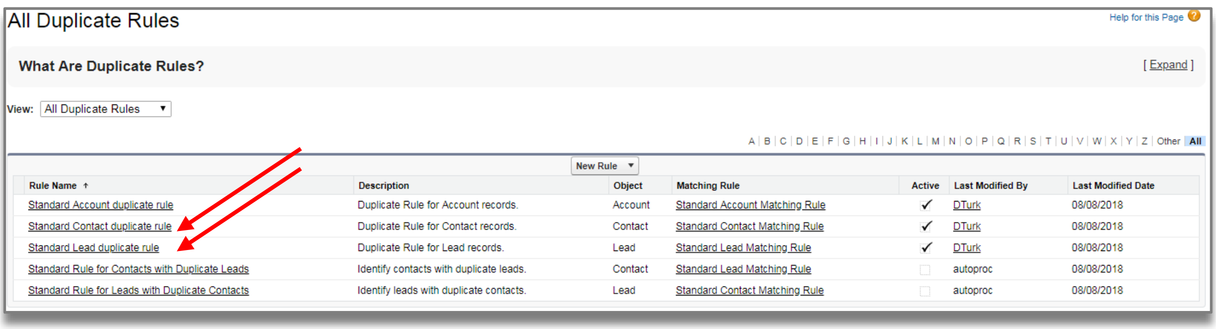


- **Click Deactivate** this will disable the rule



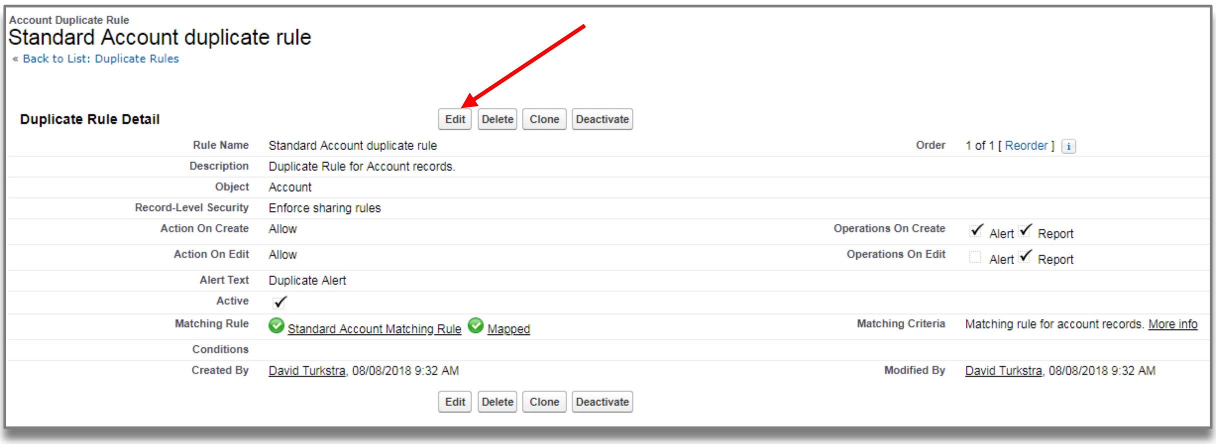
- **Click Back to List**: **Duplicate Rules** and repeat for “Contact” and “Lead” rules.

Once you are done, then go directly to Section 1.13, you no longer need to do the Disable for Single Installation User.

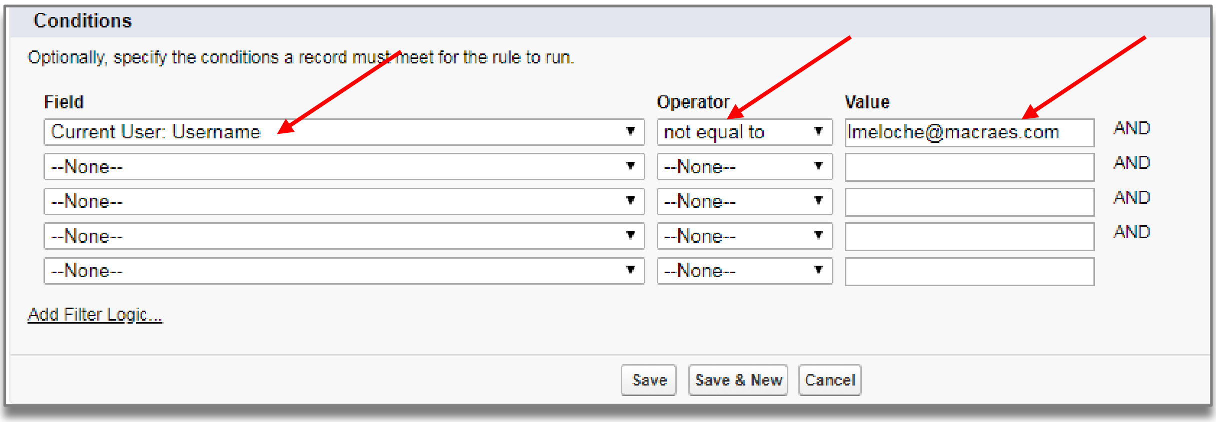


2) Disable for Single Installation User

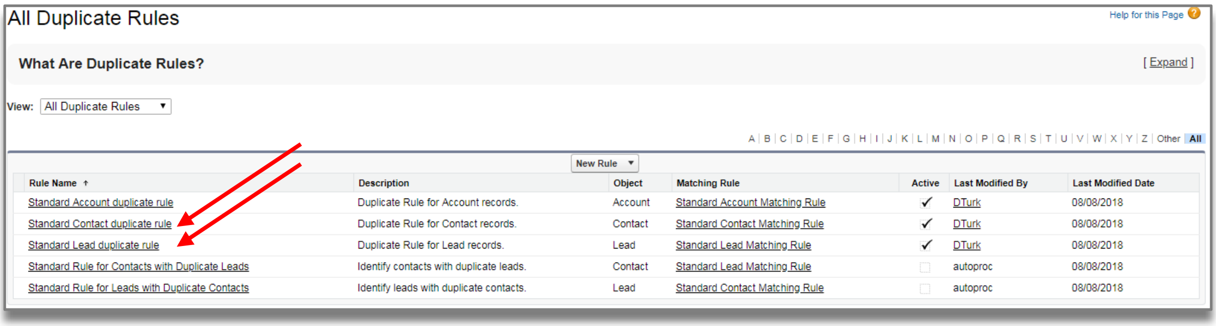
▶ For each duplicate rule, click the rule name and select “Edit”



▶ Under conditions, add a condition with “Current User: Username”, “not equal to”, and the Salesforce username (login) of the user that installed the package.



▶ Repeat for all applicable rules



1.13 Set up Lead Source with Process Builder

Assigning a custom lead/account source value to records created by the Salesforce package is a recommended best practice. A few of the benefits are:

- Administrators are able to identify records added by the prospecting feature
- Filtered views can be created for Accounts, Contacts, Leads

▶ **Before beginning, you will need to:**

- Obtain system administrator access to the Salesforce org
- Decide on a custom source picklist value. It is recommended to use the package name. This will be referred to as picklist value in the Process Builder instructions.

● Identify the Salesforce package’s namespace. (Setup > Installed Packages > value in the table under “Namespace Prefix”). This will be referred to as PackageNamespace in the Process Builder instructions.

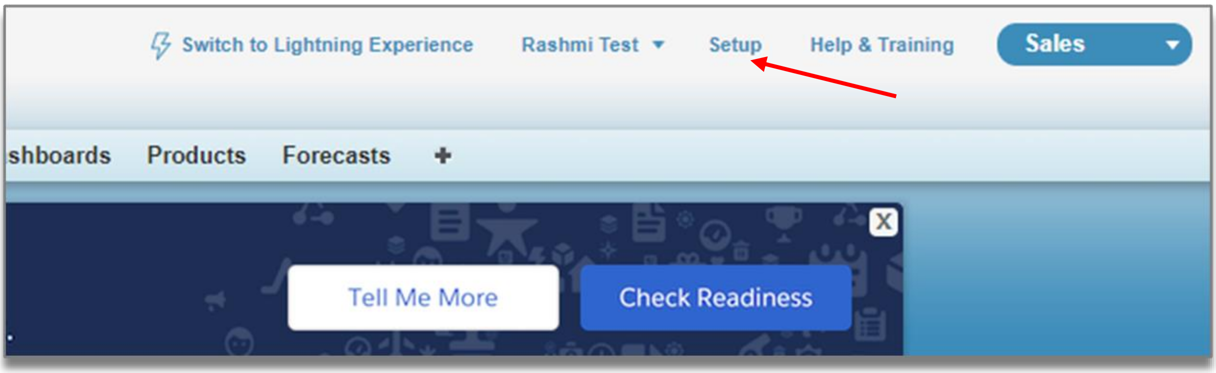
● Identify the Salesforce package’s names for the custom account, contact, and lead objects (Setup > Objects > list of objects for the installed package). These will be referred to as Custom_Account, Custom_Contact, and Custom_Contact_Lead objects in the Process Builder instructions.

NOTE: The package’s custom objects will each have a field for Source. When the record is created using Prospecting, the value of Source will be Y. For records that previously existed or were created by any other process, the Source value will be blank. Using the criteria Source = Y, we can determine that the source of the record is the Salesforce package.

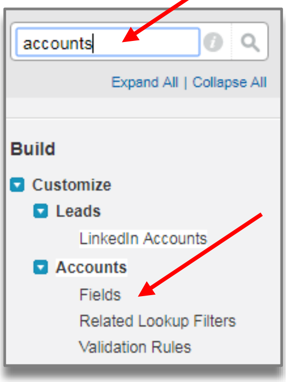
1.13.1 Add the New Account/Lead Source picklist value

***NOTE:** There is one picklist that is used for Lead Source, Account Source, and Contact (Lead) Source. The custom source picklist value will only need to be added to the picklist once.*

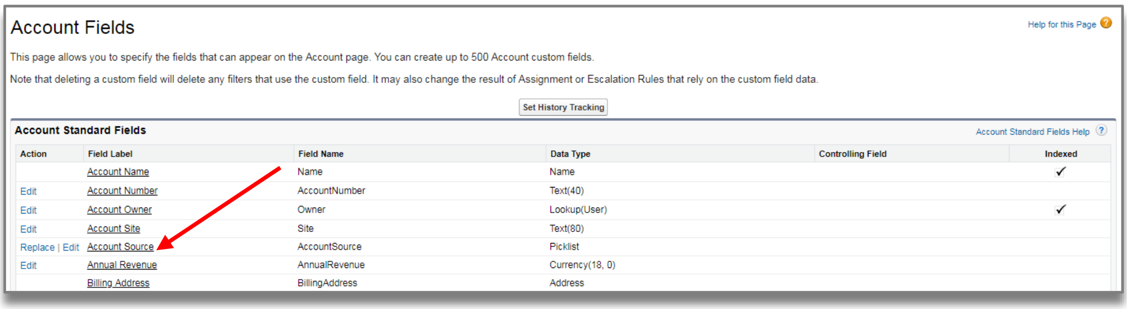
- **Click Setup**



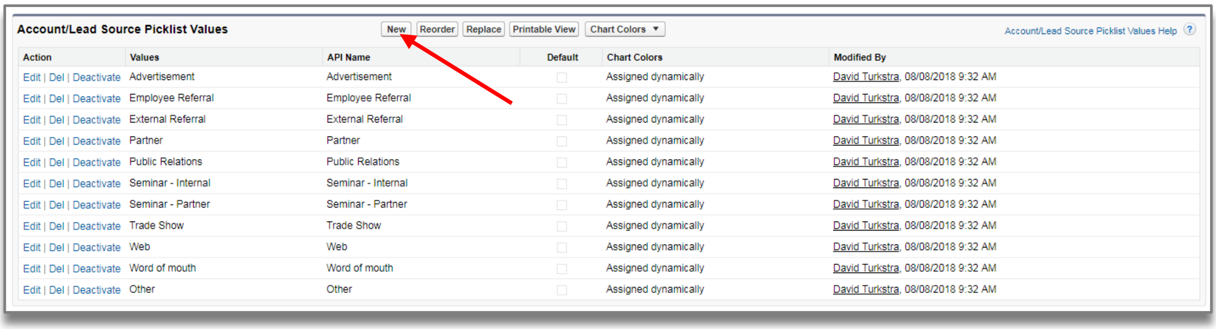
- Type “Accounts” in **Quick Find / Search** box. (Do not press Enter). > click **Fields** (under accounts)



- Click **Account Source** field link

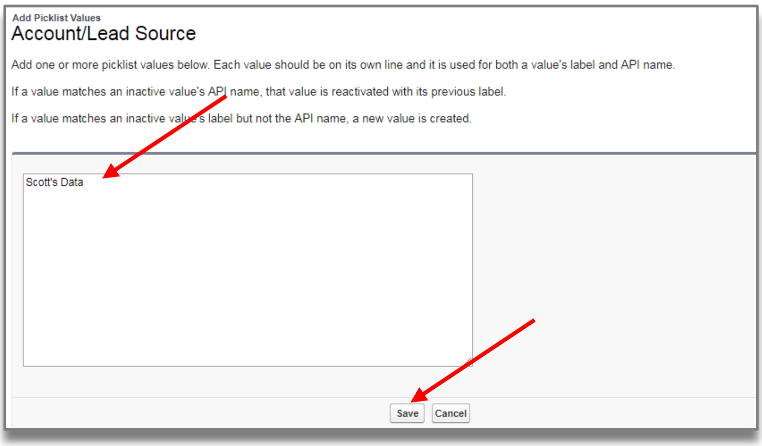


- Under Account/Lead Source Picklist Values, click **New**



Action	Values	API Name	Default	Chart Colors	Modified By
Edit | Del | Deactivate	Advertisement	Advertisement		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Employee Referral	Employee Referral		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	External Referral	External Referral		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Partner	Partner		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Public Relations	Public Relations		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Seminar - Internal	Seminar - Internal		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Seminar - Partner	Seminar - Partner		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Trade Show	Trade Show		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Web	Web		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Word of mouth	Word of mouth		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit | Del | Deactivate	Other	Other		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM

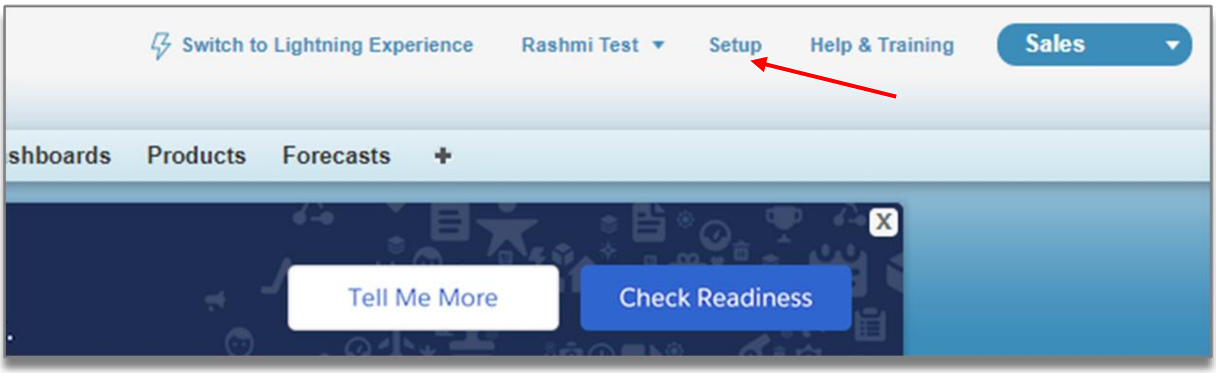
- Type the name of the custom source value and click **Save** i.e. "Scott's Data"



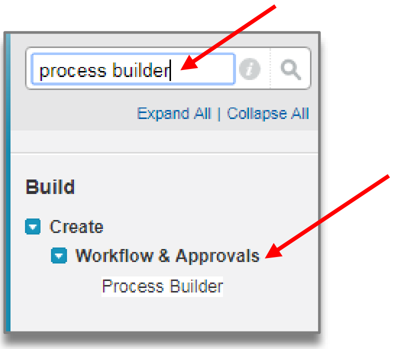
1.13.2 Process Builder

NOTE: *This step will be completed 3 times. Once each for Accounts, Contacts, and Leads Setup*

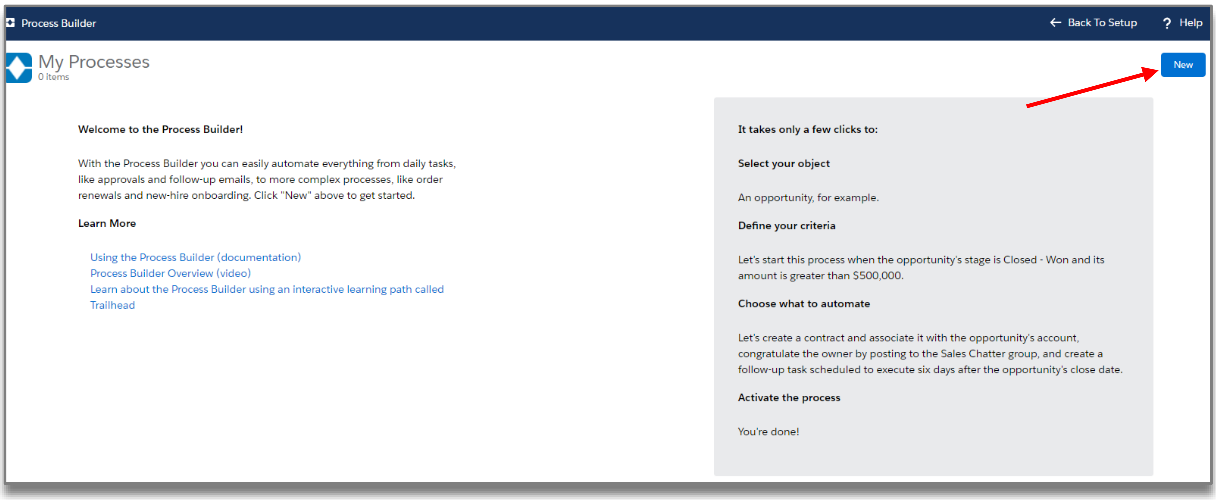
- **Click Setup**



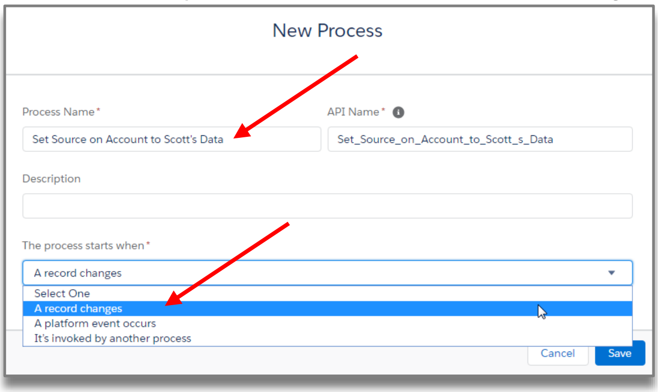
- *Type "process builder" in* **Quick Find / Search** box. (Do not press Enter).
- Click ***Process Builder*** *(under Workflow & Approvals)*



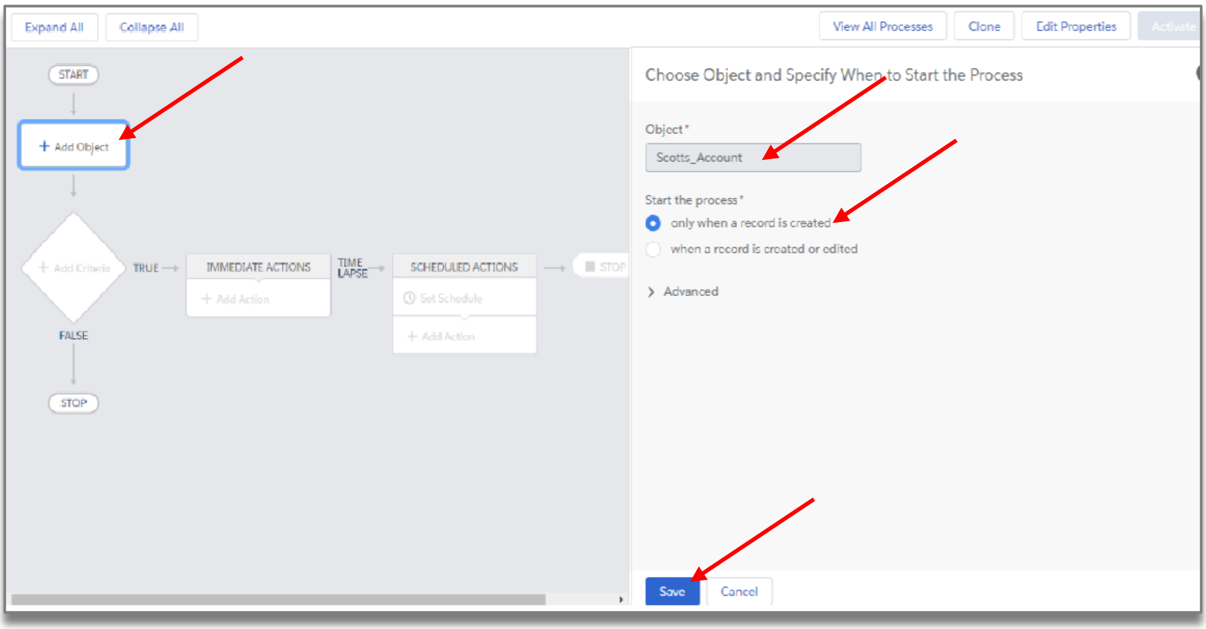
- Click **New** button



- Name the process (i.e. Set Source on *{Account* | *Contact* | *Lead}* to *{picklist value}* i.e. *Scott's Data*).
- Choose the process starts when **A record changes**

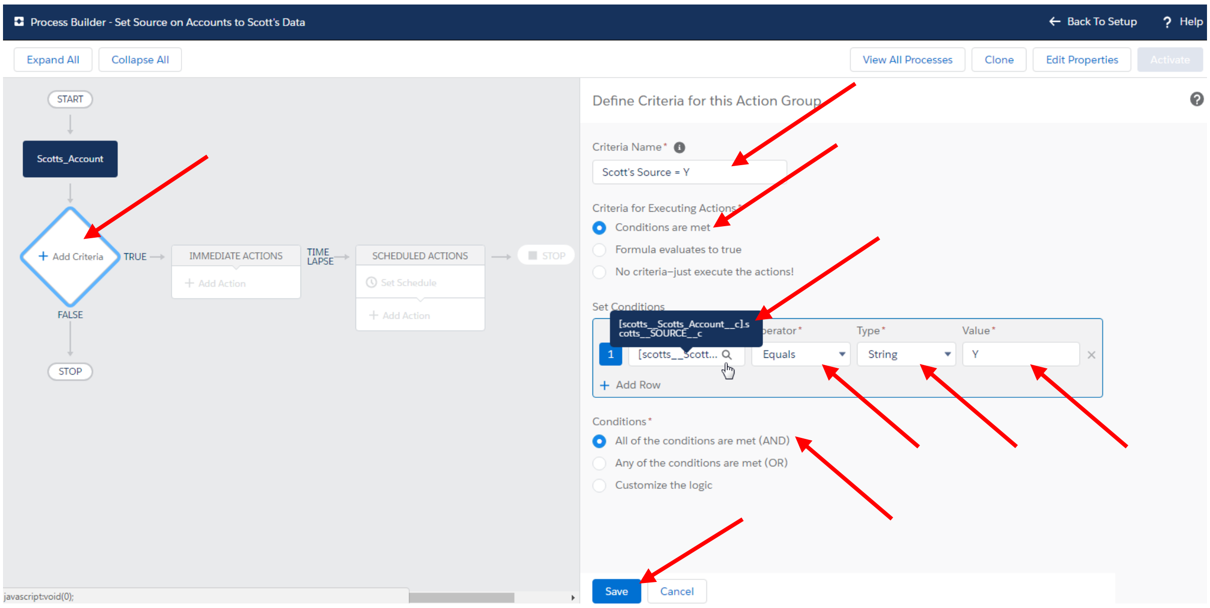


- Click **Add Object**
- Object: Choose **Custom_Account | Custom_Contact or Custom_Contact_Lead** object depending on which process is being built (i.e. Scotts_Account, Scotts_Account_Lead, Scotts_Contact, Scotts_Contact_Lead,)
- Choose the radio button for start the process is **only when a record is created**
- Click **Save**

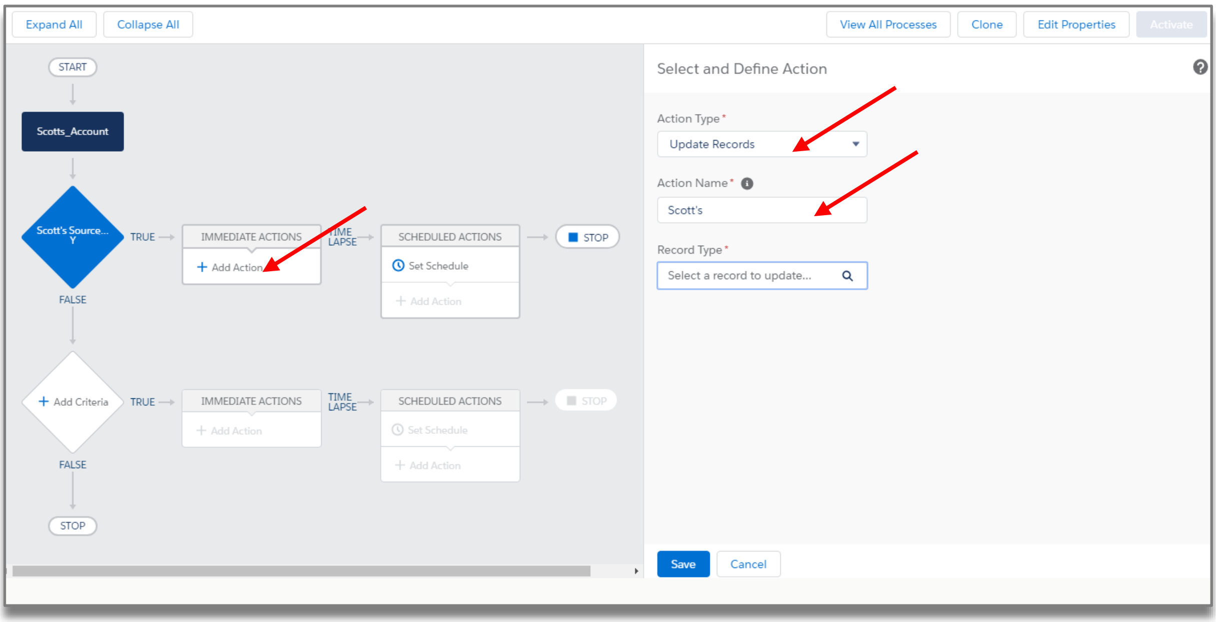


- Click **Add Criteria**

- Criteria name: **Custom Object Source = Y** (This name is not important) i.e. Scott's Source = Y
- Choose the radio button for Criteria for Executing Actions: **Conditions are met**
- Set Conditions: Choose the Source field
- Field = Source
- Operator = Equals
- Type = String
- Value = Y
- Choose the radio button for the Conditions: **All of the conditions are met (AND)**
- Click **Save**

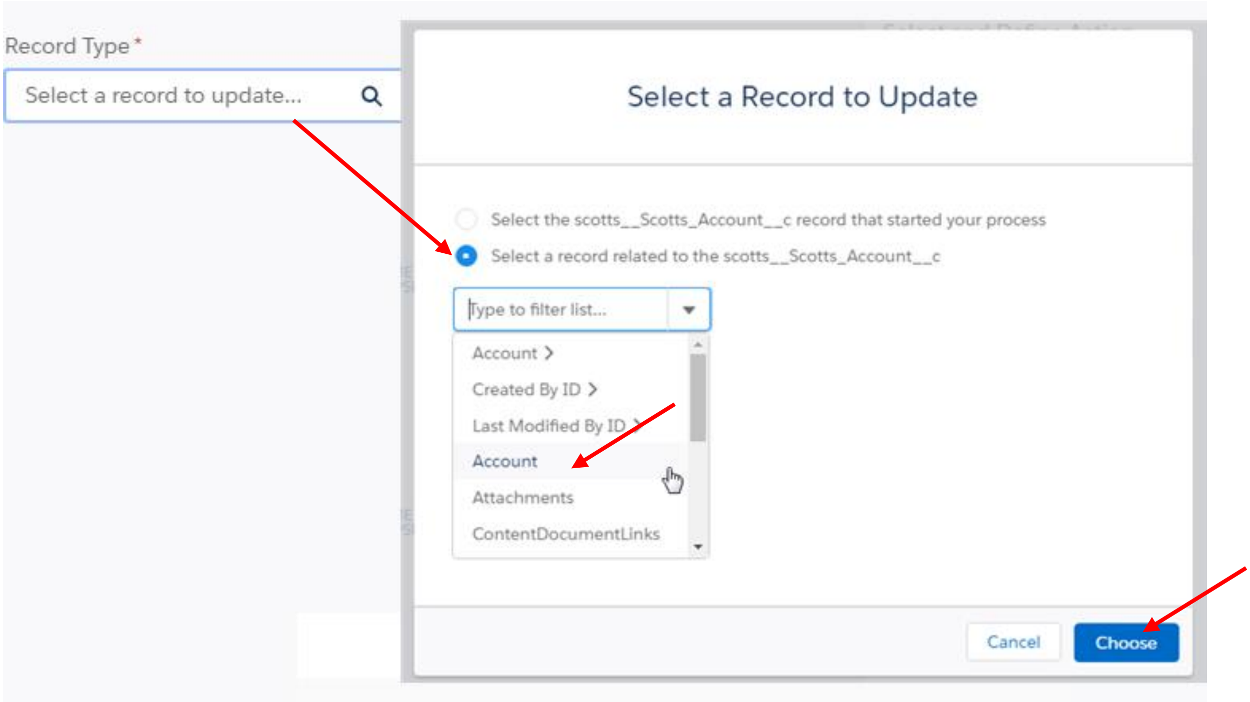


- Click **Add Action**
- Action Type: **Update Records**
- Action Name: **Update Source** (ie. Scott's)

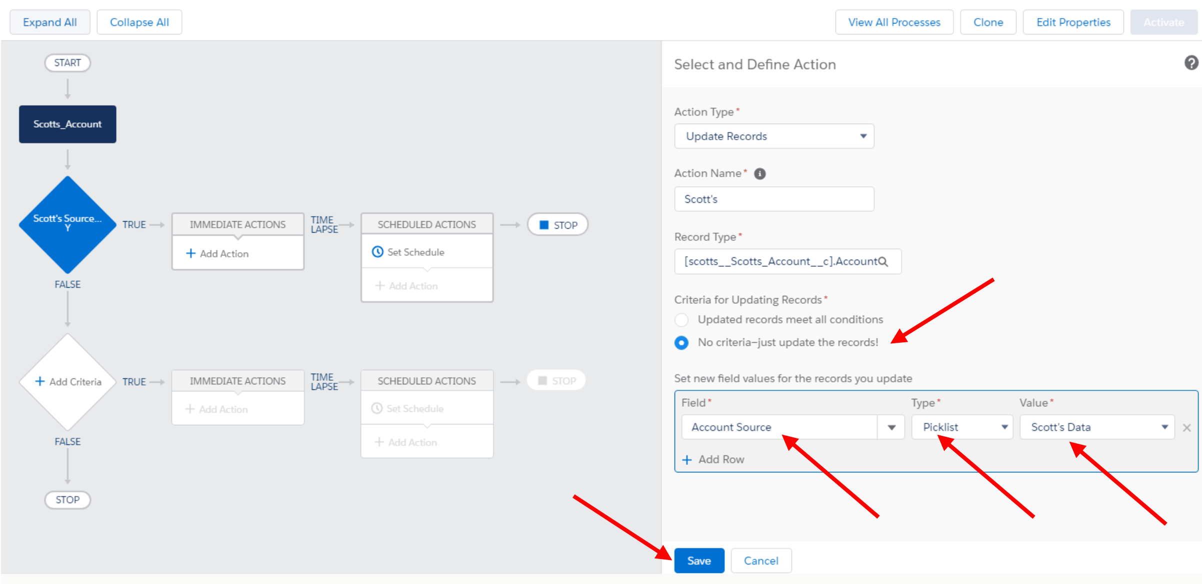


- Record Type: **Select a record related to the (Custom Object)**

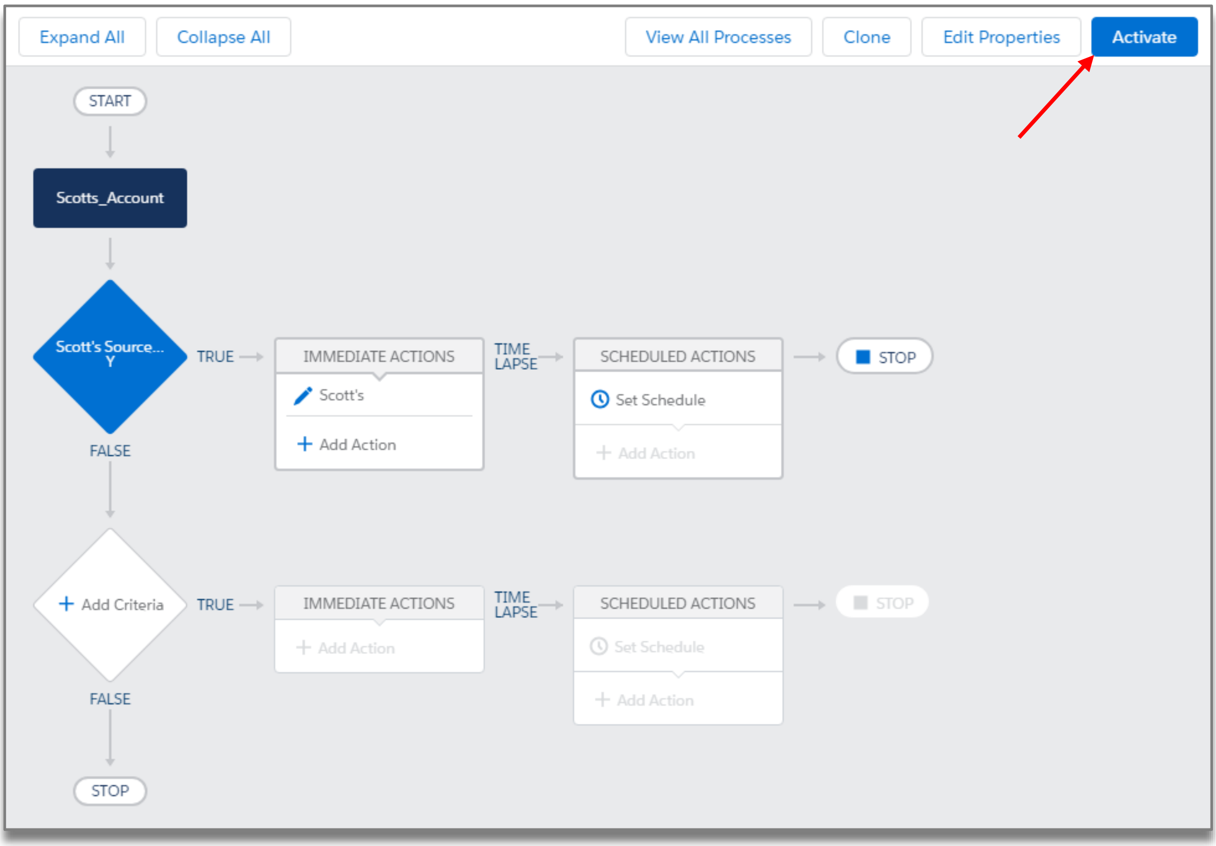
- Choose **Account | Contact | Lead** depending on process being built. Do not choose **Account > | Contact > | Lead >**
- Click **Choose**
- Record Type: **Select a record related to the (Custom Object)**
- Choose **Account | Contact | Lead** depending on process being built. Do not choose **Account > | Contact > | Lead >**
- Click **Choose**



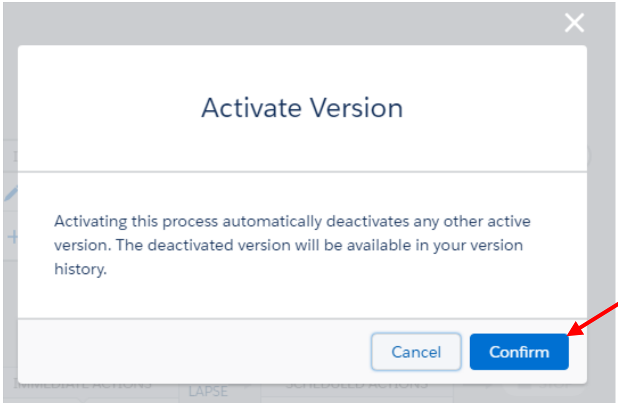
- Criteria for Updating Records: **No Criteria - just update the records!**
- Field: For Accounts, choose **Account Source**. For Contacts or Leads, choose **Lead Source**
- Type: **Picklist**
- Value: Choose the picklist value created (i.e. Scott's Data)
- Click **Save**



▶ Review your entries, and click **Activate**



▶ And then **Confirm** the process.



▶ Repeat the Process Builder instructions **1.13.2** to create processes for Accounts, Contacts, And Leads