

SCOTTS FOR SALESFORCE APP INSTALLATION

1.1 Overview

Objective: successful installation and configuration of data provider's Salesforce package

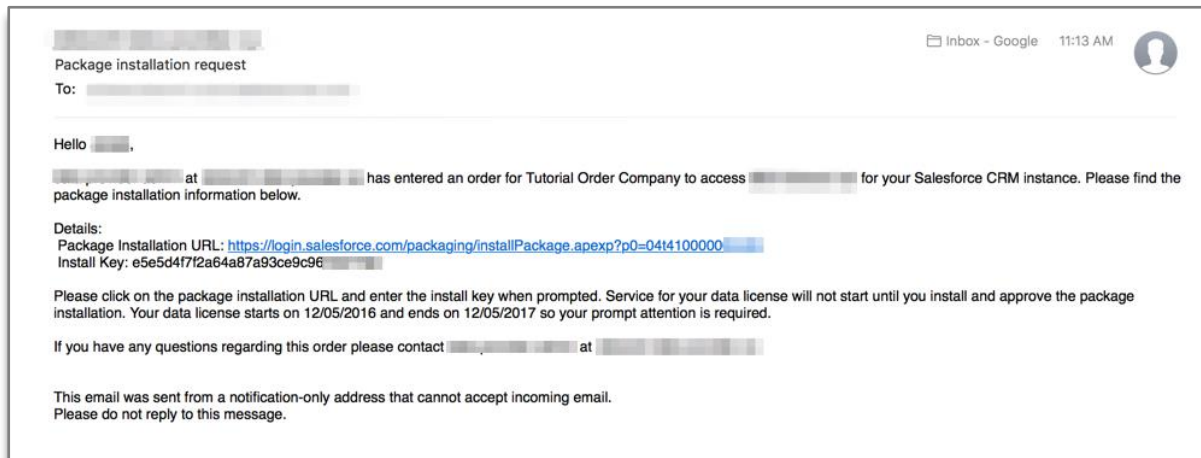
What you'll need: package installation URL and install key from order email
Salesforce user with admin permissions

Estimated time to complete: 15-20 minutes

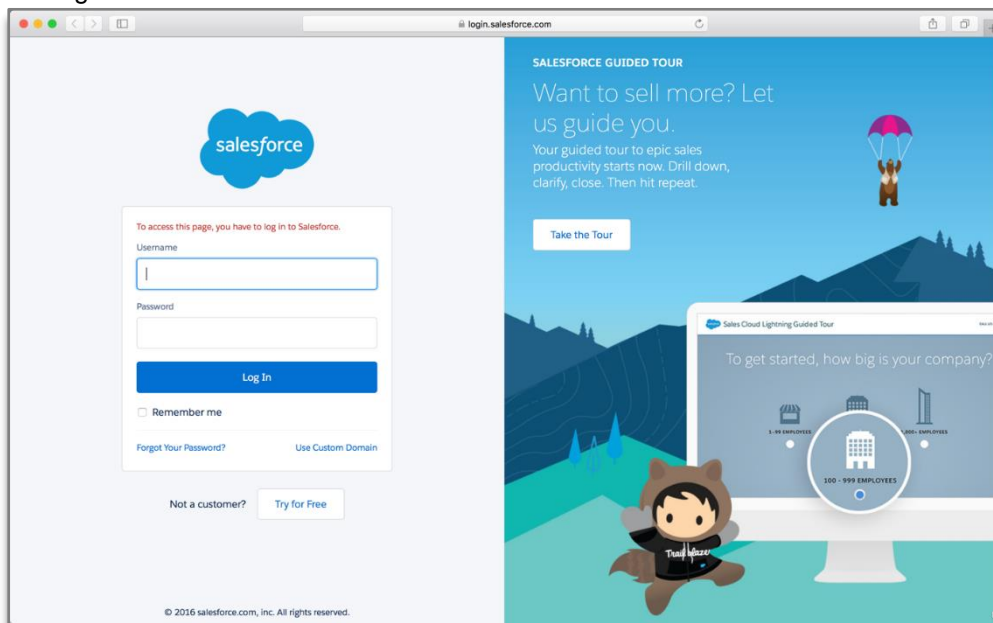
1.2 Install the Package

- ▶ 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>



- ▶ Log in to Salesforce as an Admin User



- ▶ Install for all users

Install

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
		1.0	1.0 (Beta 10)

[Additional Details](#) [View Components](#)

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

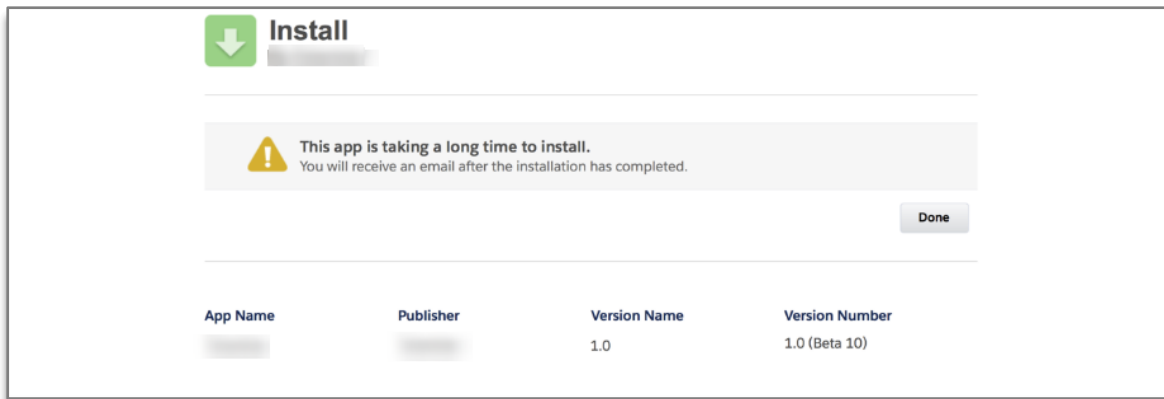
Install

i Installation Complete!

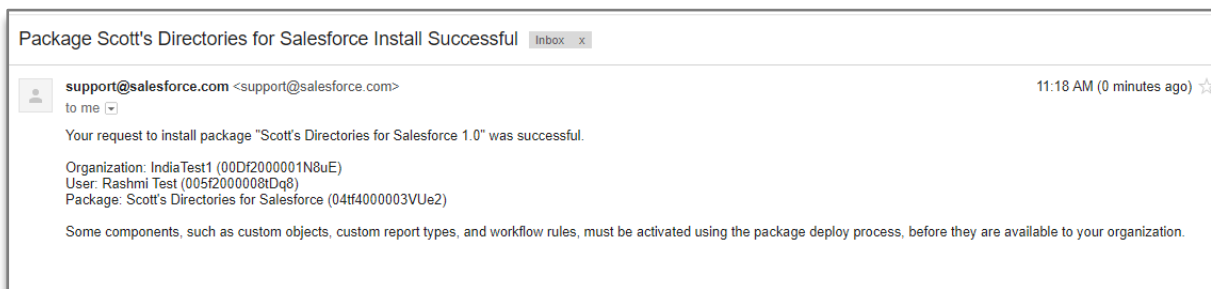
Done

App Name	Publisher	Version Name	Version Number
		1.0	1.0 (Beta 10)

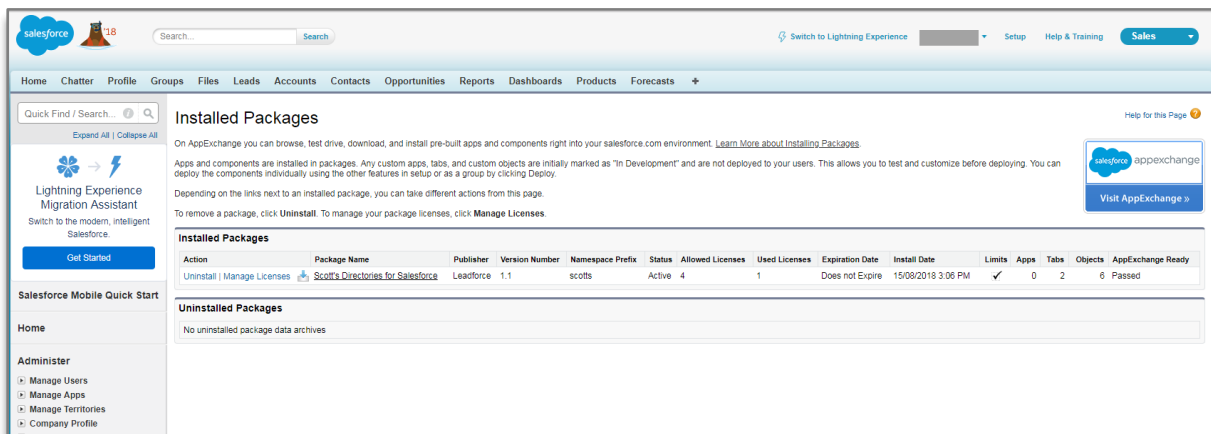
NOTE: If Salesforce is busy this can take a while.



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

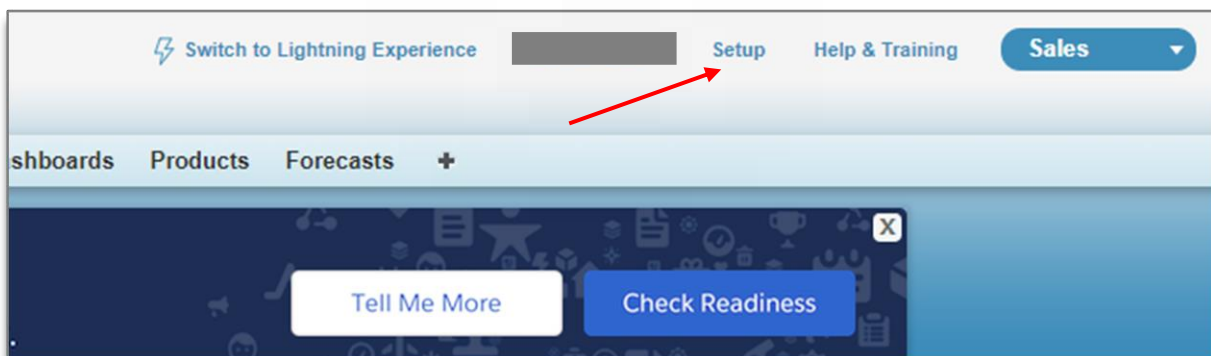


- This is what your screen will look like.



1.3 Setup

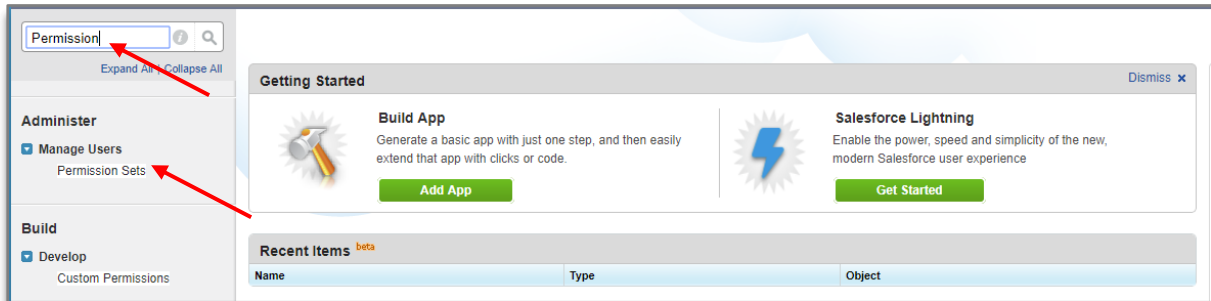
- Click Setup in the top right corner of Salesforce.



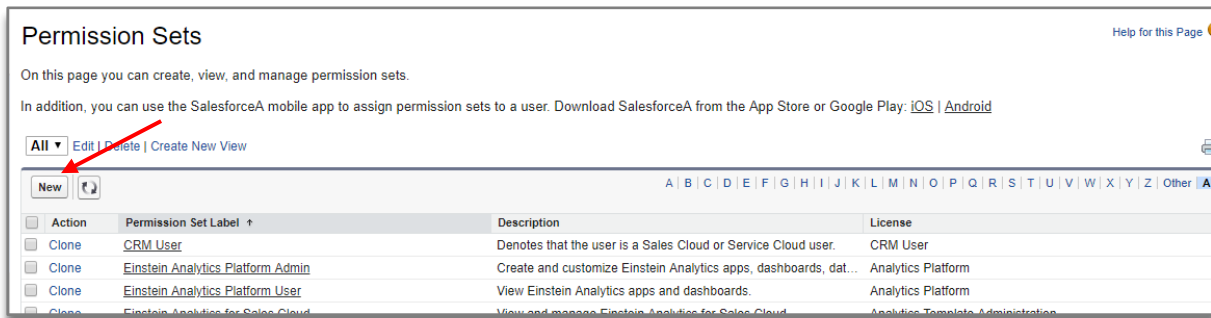
NOTE: From this point forward in the tutorial if you get lost or confused you can always get back to a clean slate by returning to **Setup**. All remaining tasks will be completed in the Admin section of Salesforce.

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.

This screenshot shows the 'Create Permission Set' form in the Salesforce Admin console. The form has a 'Save' button at the top right. Below it is a section titled 'Enter permission set information' with fields for 'Label' (containing 'Scott's Permissions'), 'API Name' (containing 'Scott_s_Permissions'), and 'Description'. There is also a 'Session Activation Required' checkbox. Below this is a section titled 'Select the type of users who will use this permission set' with a dropdown menu for 'License' (set to '--None--'). A red arrow points to the 'Save' button at the bottom right.

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

Permission Set
Scott's Permissions

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview

Description	API Name	Scott_s_Permissions
License	Namespace Prefix	
Session Activation Required		<input type="checkbox"/>
Created By	Rashmi Test	27/07/2018 1:54 AM
Last Modified By	Rashmi Test	27/07/2018 1:54 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

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.

Permission Set
Scott's Permissions

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > **Object Settings**

Object Settings

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.

Permission Set
Scott's Permissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings ▾ **Scotts_Account_Leads** ▾

Scotts_Account_Leads Edit

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
# of Employees	<input type="checkbox"/>	<input type="checkbox"/>
Address Line 1	<input type="checkbox"/>	<input type="checkbox"/>
Address Line 2	<input type="checkbox"/>	<input type="checkbox"/>
Business Type	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>
Company Legal Name	<input type="checkbox"/>	<input type="checkbox"/>

- ▶ 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.

Permission Set
Scott's Permissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings ▾ **Scotts_Account_Leads** ▾

Scotts_Account_Leads Save Cancel

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

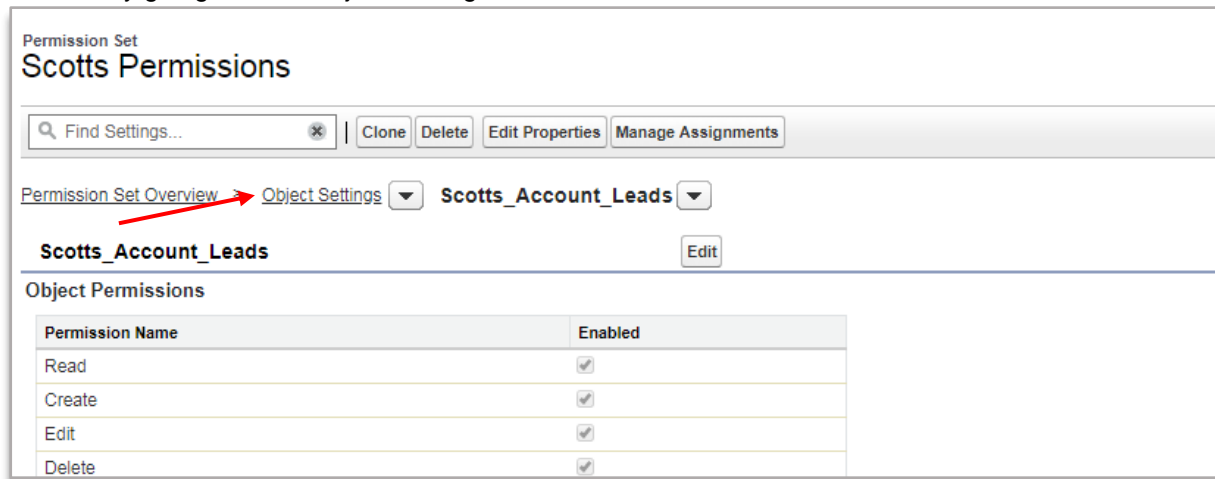
Field Permissions

Field Name	Read Access	Edit Access
# of Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address Line 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Business Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Legal Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.



Permission Set
Scotts Permissions

Find Settings... Clone Delete Edit Properties Manage Assignments

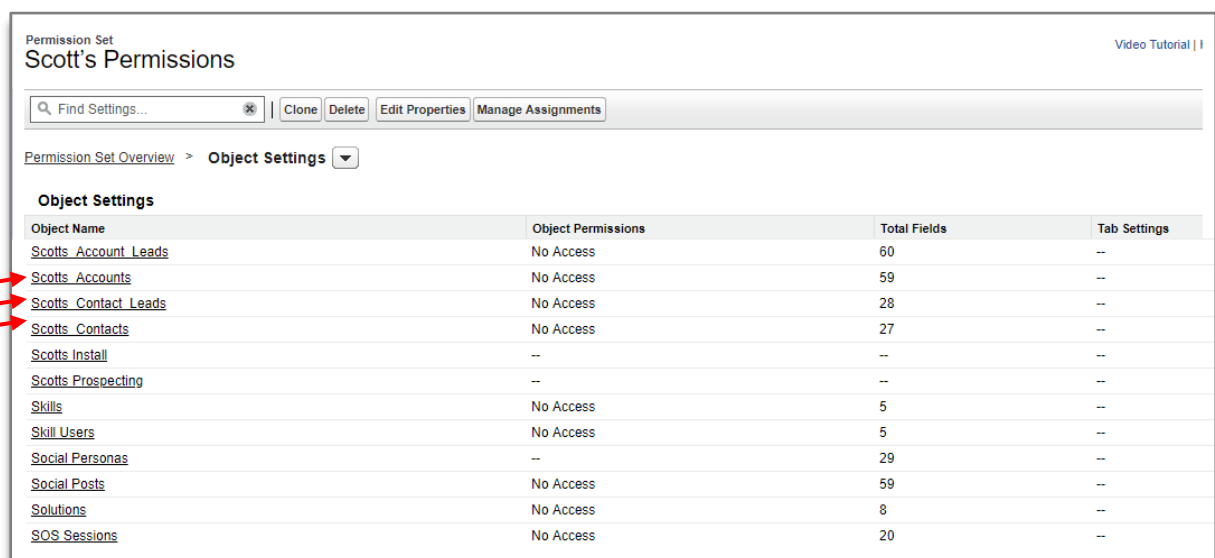
Permission Set Overview → **Object Settings** ▼ **Scotts_Account_Leads** ▼

Scotts_Account_Leads Edit

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>

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



Permission Set
Scott's Permissions

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > **Object Settings** ▼

Object Settings

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	--

1.5 Enable the Prospecting Tab

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

Permission Set
Scott's Permissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings

Object Settings

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.

Permission Set
Scott's Permissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings **Scotts Prospecting**

Scotts Prospecting Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/> i	<input checked="" type="checkbox"/> i

1.6 Assign the Permission Set

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

The screenshot shows the 'Permission Set Overview' page for 'Scott's Permissions'. At the top, there's a search bar 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. Below this, a breadcrumb trail shows 'Permission Set Overview > Object Settings' with a dropdown arrow, followed by 'Scotts Prospecting' with another dropdown arrow. A red arrow points to the 'Permission Set Overview' link in the breadcrumb. Below the breadcrumb, there's a section for 'Scotts Prospecting' with an 'Edit' button. Underneath is the 'Tab Settings' section, which contains two columns: 'Available' and 'Visible'. Each column has a checkbox and an information icon (i).

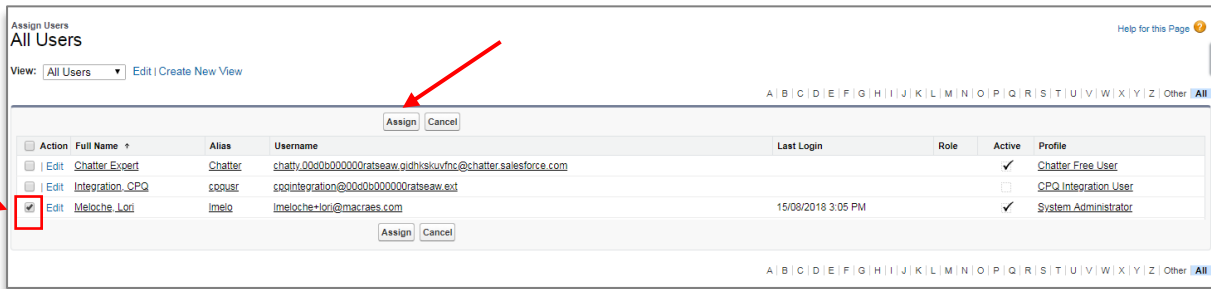
- ▶ Click the **Manage Assignments** button.

The screenshot shows the 'Manage Assignments' page for 'Scott's Permissions'. At the top, there's a search bar 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. A red arrow points to the 'Manage Assignments' button. Below this, there's a 'Permission Set Overview' section with a table containing details about the permission set, including 'Description', 'License', 'API Name', 'Namespace Prefix', 'Session Activation Required', 'Created By', and 'Last Modified By'. Below this is the 'Apps' section, which contains two sub-sections: 'Assigned Apps' and 'Assigned Connected Apps', each with a brief description and a 'Learn More' link.

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

The screenshot shows the 'Add Assignments' page for 'Scott's Permissions'. At the top, there's a search bar 'Find Settings...' and buttons for 'Clone', 'Delete', 'Edit Properties', and 'Manage Assignments'. Below this, there's a 'Permission Set Overview' section with a table containing details about the permission set. Below this is the 'Assigned Users' section, which contains a table with columns: 'Full Name', 'Alias', 'Username', 'Last Login', 'Role', 'Active', and 'Profile'. The table is currently empty, showing 'No records to display.' Below the table, there are buttons for 'Add Assignments' and 'Remove Assignments'. A red arrow points to the 'Add Assignments' button. At the bottom of the page, there's a navigation bar with links for 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T'.

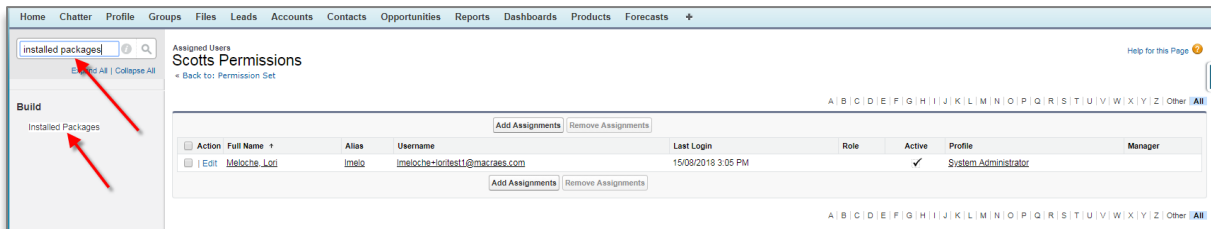
- ▶ Select the checkbox next to your user.
- ▶ Click the **Assign** button.



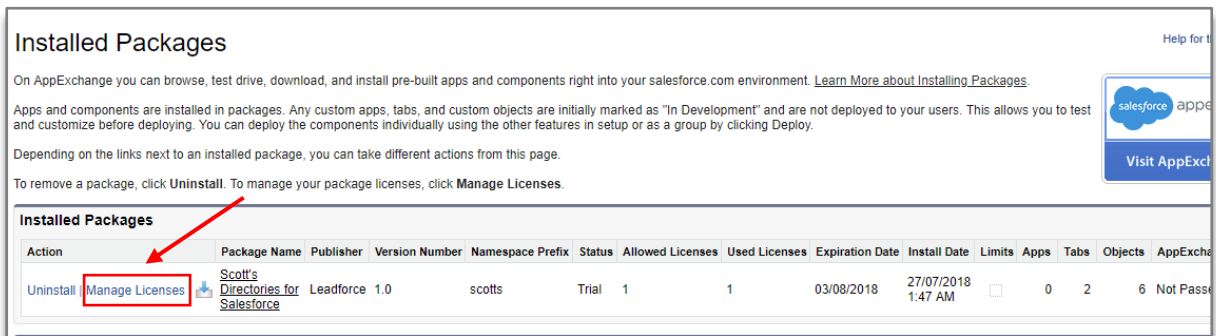
1.7 Manage licenses

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.

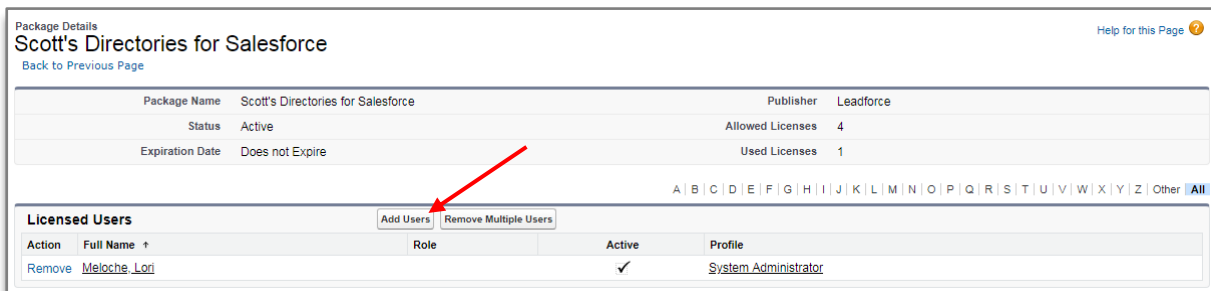
- ▶ Type "installed packages" into the **Quick Find / Search** box. (Do not press Enter).
- ▶ Click on the -> **Installed Packages** link.



- ▶ 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.

The screenshot shows the 'Available Users' section in Salesforce. At the top, there are buttons: 'Select Shown', 'Deselect Shown', 'Deselect All', and 'Add All Users'. Below this is a table with columns: 'Action', 'Full Name', 'Role', 'Active', and 'Profile'. The first row shows a user named 'user, standard' with a checked 'Active' status and 'Standard User' profile. Below the table is the 'Selected Users' section, which currently shows 'No rows selected'. At the bottom left of the 'Selected Users' section, the 'Add' button is highlighted with a red box.

1.8 Configure Connected App Permissions

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

The screenshot shows the Salesforce search results for 'connected apps'. The search bar at the top left contains the text 'connected apps'. Below the search bar, there are links for 'Expand All' and 'Collapse All'. On the left sidebar, under the 'Administer' section, the 'Manage Apps' link is highlighted with a red arrow. Below 'Manage Apps', there are links for 'Connected Apps', 'Connected Apps OAuth Usage', and 'Usage'. The main content area shows 'Package Details' for 'Scott's Directories for Salesforce'. It includes a table with columns: 'Package Name', 'Status', and 'Expiration Date'. The 'Package Name' is 'Scott's Directories for Salesforce', the 'Status' is 'Trial', and the 'Expiration Date' is '02/08/2018'. Below this table, there is a 'Licensed Users' section with buttons for 'Add Users' and 'Remove Multiple Users'. It contains a table with columns: 'Action', 'Full Name', 'Role', and 'Active'. The first row shows a user named 'Test_Rashmi' with a checked 'Active' status. A red arrow points to the search bar.

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

The screenshot shows the 'Connected Apps' page in Salesforce. At the top, there is a heading 'Connected Apps' and a sub-heading 'Manage access to apps that connect to this Salesforce organization.' Below this is the 'App Access Settings' section with an 'Edit' button. There is a checkbox labeled 'Allow users to install canvas personal apps' which is checked. Below this is a 'View' section with a dropdown menu set to 'All' and a link 'Create New View'. At the bottom, there is a table with columns: 'Action', 'Master Label', 'Application Version', and 'Permitted Users'. The first row shows 'CPQ Integration User Connected App' with version '1.0' and 'Admin approved users are pre-authorized'. The second row shows 'Scott's Data' with version '2.0' and 'All users may self-authorize'. A red arrow points to the 'Edit' link for 'Scott's Data'.

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

Connected App Edit

Version 4

Basic Information

Start URL Mobile Start URL

OAuth policies

Permitted Users **Admin approved users are pre-authorized**

Enable Single Logout ☐

IP Relaxation **Enforce IP restrictions**

Refresh Token Policy: ☐ Refresh token is valid until revoked ☐ Immediately expire refresh token ☐ Expire refresh token if not used for Day(s) ☐ Expire refresh token after Day(s)

Session Policies

Timeout Value **--None--** ☐ High assurance session required

Custom Connected App Handler

Apex Plugin Class Run As

User Provisioning Settings

☐ Enable User Provisioning

Save **Cancel**

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

Connected Apps

Manage access to apps that connect to this Salesforce organization.

App Access Settings **Edit**

☒ Allow users to install canvas personal apps

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

Action	Master Label ↑	Application Version	Permitted Users
Edit	CPQ Integration User Connected App	1.0	Admin approved users are pre-authorized
Edit	Scott's Data	2.0	Admin approved users are pre-authorized

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

The screenshot shows the 'Session Policies' and 'Custom Connected App Handler' sections. Below these is the 'User Provisioning Settings' section with a checkbox for 'Enable User Provisioning'. The 'Trusted IP Range for OAuth Web server flow' section shows 'No application-defined IP ranges'. The 'Profiles' section has a 'Manage Profiles' button. The 'Permission Sets' section has a 'Manage Permission Sets' button, which is highlighted with a red arrow. Below this is the 'Custom Attributes' section with a 'New' button. The 'Custom Settings' section shows a 'Setting Label' of 'DataristaSettings'. At the bottom, there is a 'Back To Top' link and a link to 'more records per related list'.

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

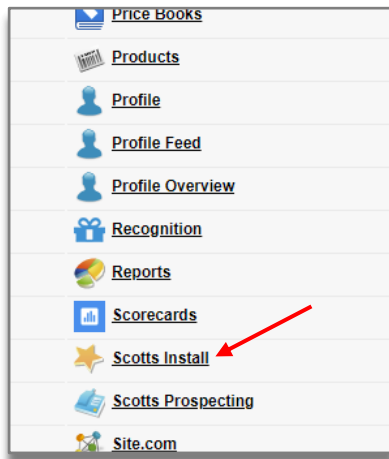
The screenshot shows the 'Application Permission Set Assignment' page. It has a header with 'Help for this Page' and a link to 'Back to Connected App Detail'. Below the header is a table with columns 'Select', 'Permission Sets', and 'Description'. The table contains one row with a checked checkbox, 'Scott's Permissions', and an empty description. A red arrow points to the checkbox. At the bottom right, there are 'Save' and 'Cancel' buttons, with another red arrow pointing to the 'Save' button.

1.9 Authenticate Installation Key

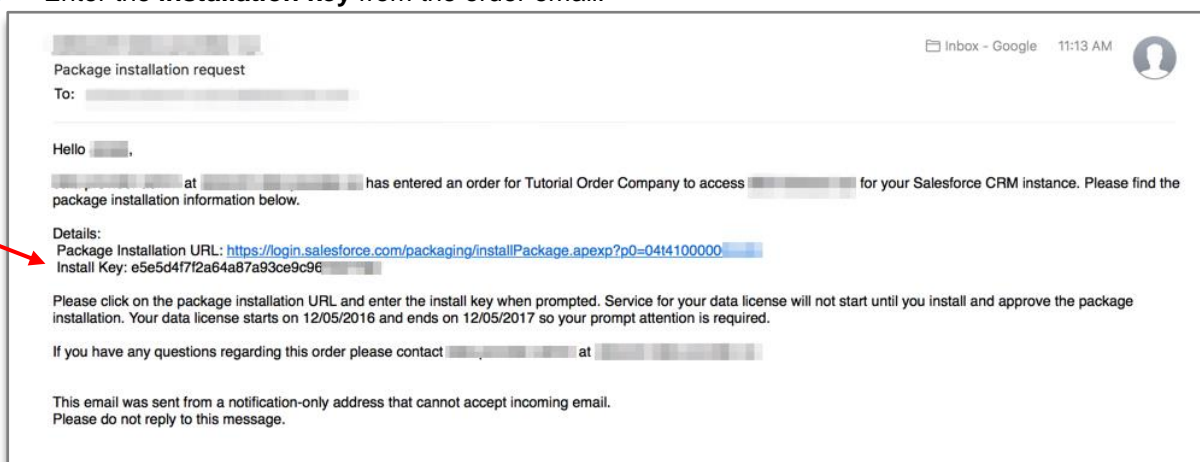
- **Click the +** on the top right of the Salesforce navigation.

The screenshot shows the Salesforce navigation bar. It includes links for 'Switch to Lightning Experience', 'Rashmi Test', 'Setup', 'Help & Training', and 'Sales'. Below these links is a navigation bar with 'Dashboards', 'Products', 'Forecasts', and a '+' button. A red arrow points to the '+' button.

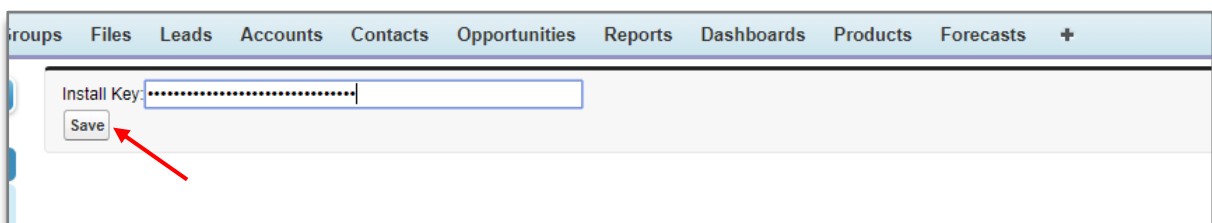
- ▶ Under **All Tabs** scroll down and **Click** the **Scott's Install** link.



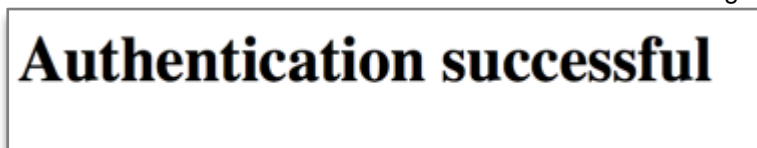
- ▶ Enter the **installation key** from the order email.



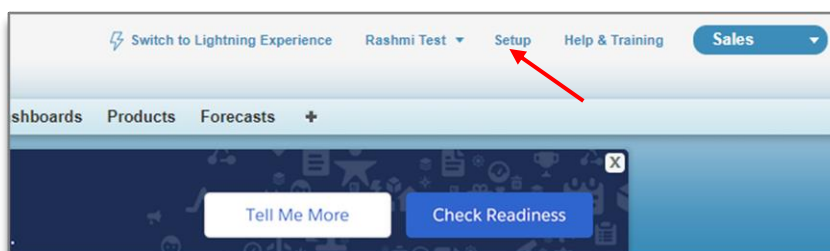
- ▶ **Click** the **Save** button.



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



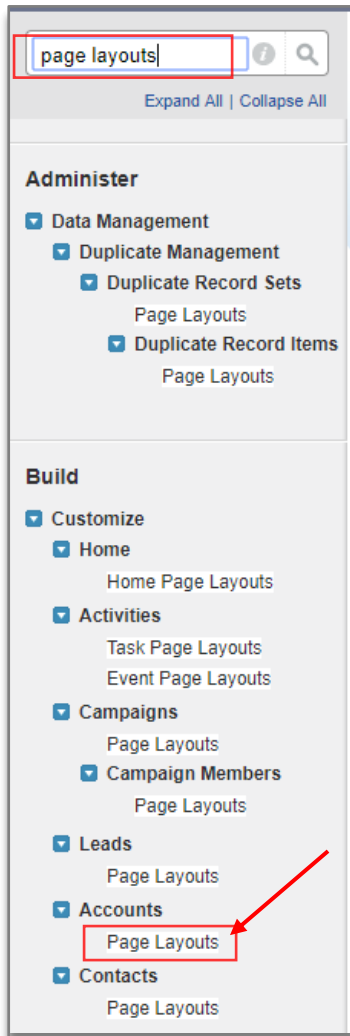
- ▶ Close the Authentication successful tab, return to Salesforce setup page.



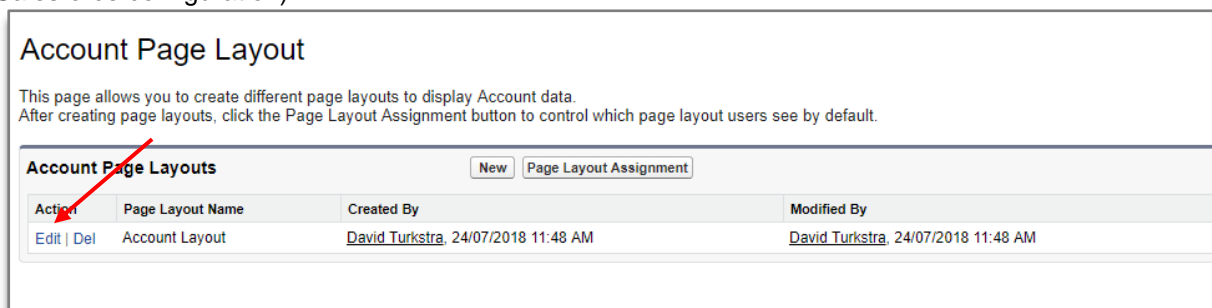
1.10 Configure Page Layouts

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.

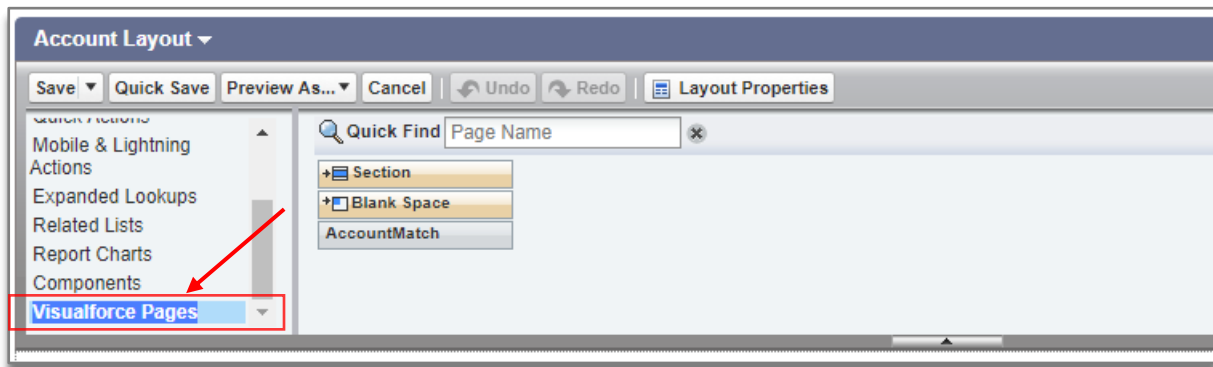
- ▶ Type “page layouts” into the **Quick Find / Search** box. (Do not press Enter).
- ▶ Click on the **Accounts -> Page Layouts** link.



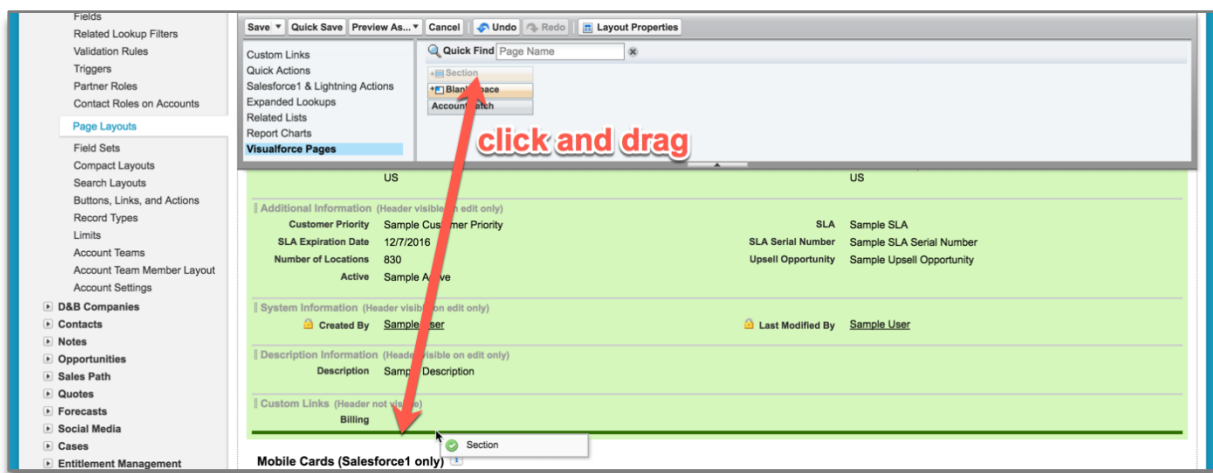
- ▶ Click the **Edit** link next to **Account Layout** (other layouts may be in use, depending on Salesforce configuration)



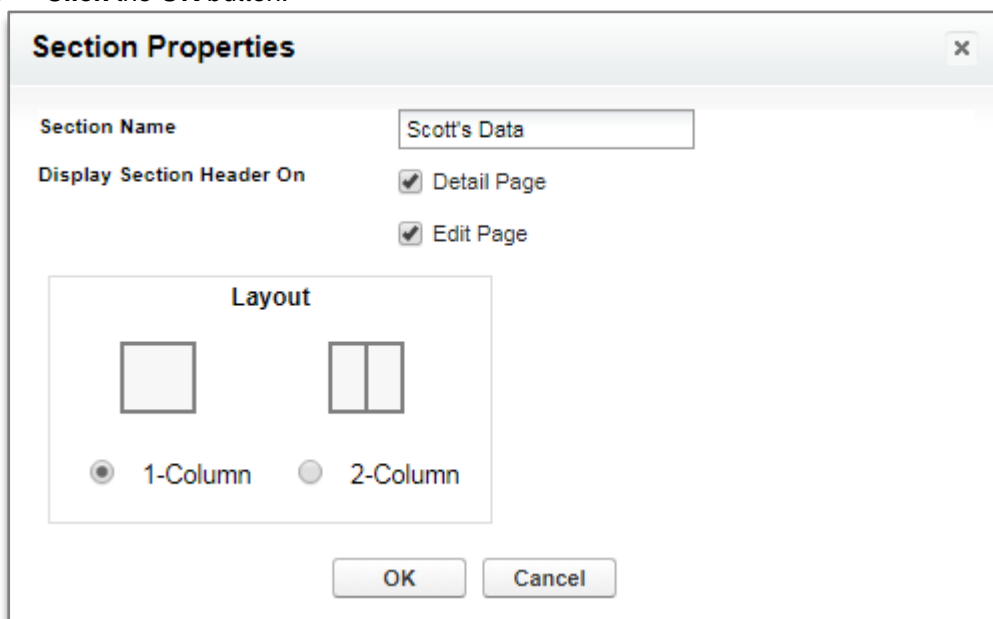
- ▶ On the top left selection list **Click Visualforce Pages**



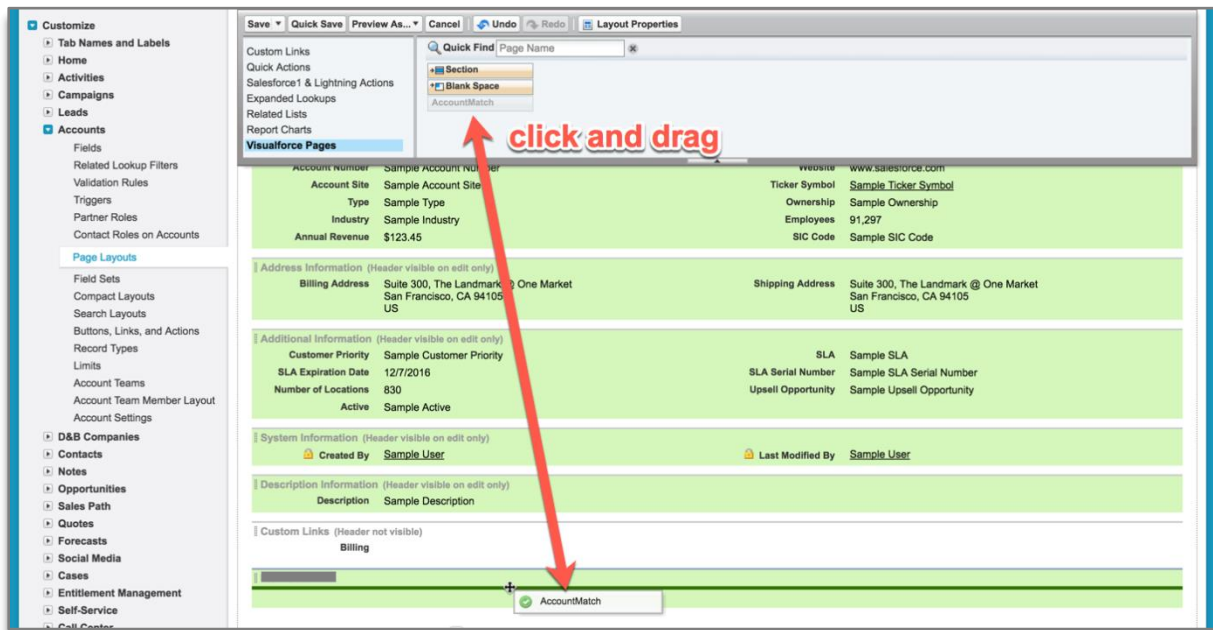
- ▶ Create a new section: Drag “Section” from the top to the layout below, place it below “Custom Links”



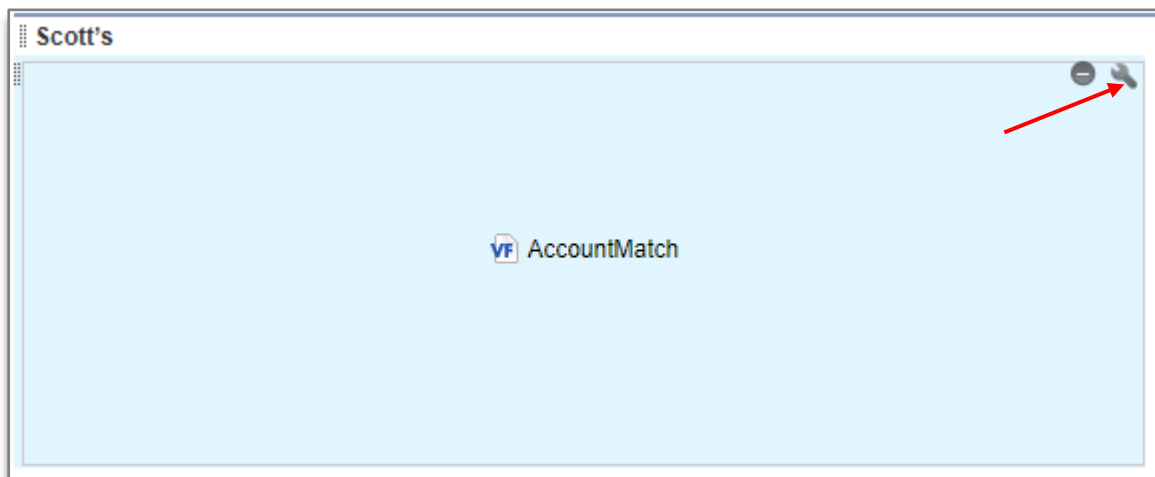
- ▶ Enter the **Name** for the section – Scott's Data
- ▶ **Select 1-Column**
- ▶ **Click the OK button.**



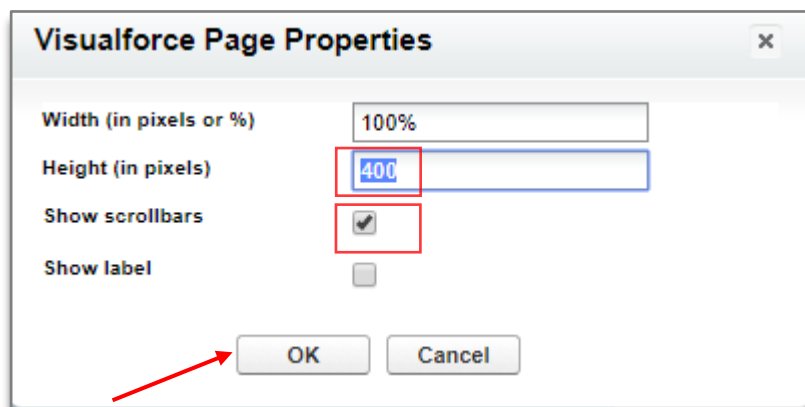
- Click and Drag **AccountMatch** into the newly created section.



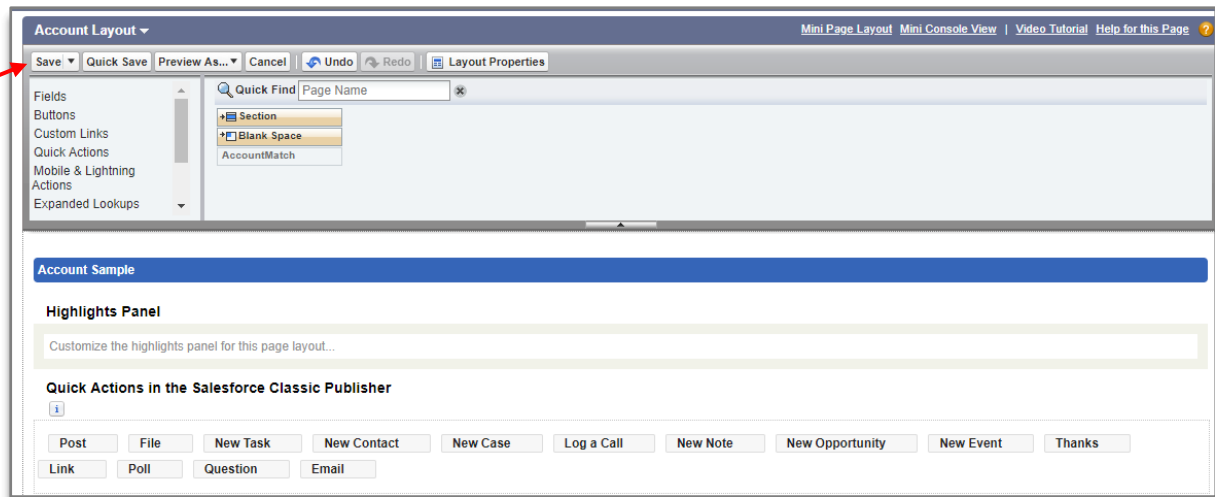
- Move the mouse to the top right of the “AccountMatch” page area. A wrench icon (properties) should appear.
- Click the wrench.



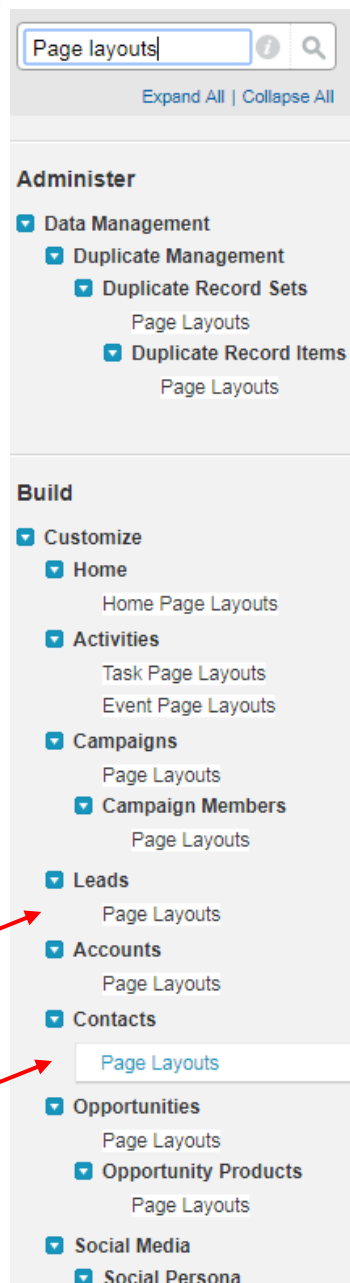
- Change the **Height** to at least **400**
- Check **Show Scrollbars** (optional)
- Click the **OK** button.



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

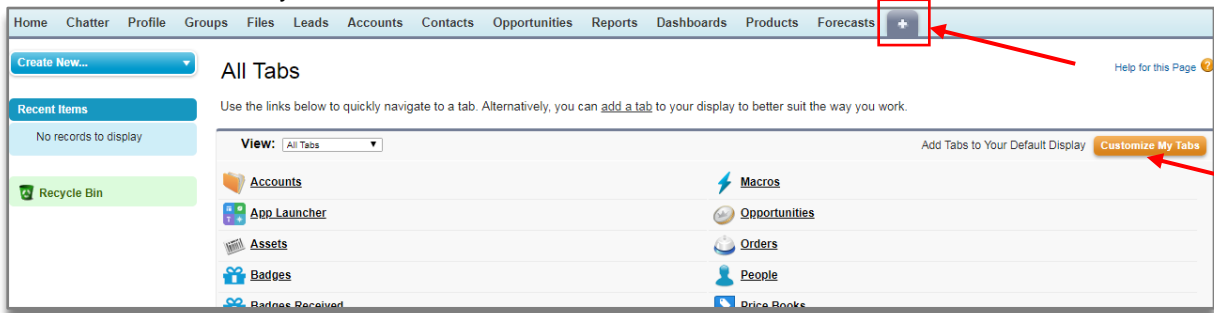


NOTE: Repeat the previous steps in 1.10 for other Salesforce Objects that are being modified, most likely Contacts and Leads.

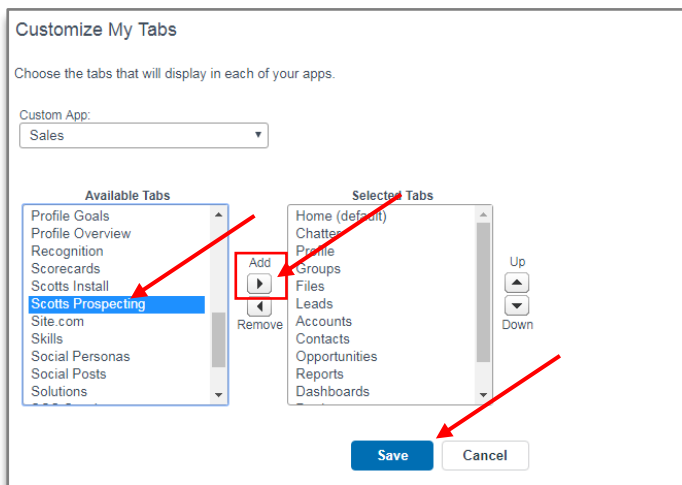


1.11 Enable Prospecting Tab (Optional)

- ▶ 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”



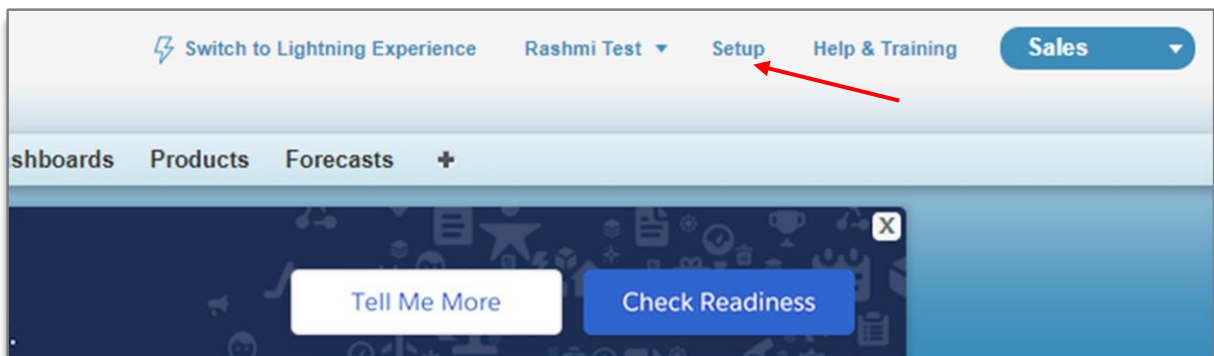
The tab will now appear in the Salesforce top navigation

1.12 Disable Duplicate Detection

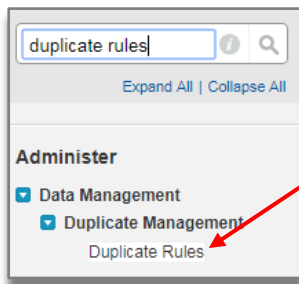
Salesforce provides standard duplicate rules for business and person accounts, contacts, and leads. A duplicate rule defines what happens when a user views a record with duplicates or starts creating a duplicate record. The default Salesforce duplicate rules may be too strict, and may interfere with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

All Duplicate Rules Help for this Page

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Account	Standard Account Matching Rule	✓	DTurk	08/08/2018
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	✓	DTurk	08/09/2018
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	✓	DTurk	08/08/2018
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule	<input type="checkbox"/>	autoproc	08/08/2018
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule	<input type="checkbox"/>	autoproc	08/09/2018

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

Account Duplicate Rule

Standard Account duplicate rule

[Back to List: Duplicate Rules](#)

Duplicate Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

Rule Name	Standard Account duplicate rule	Order	1 of 1 [Reorder]
Description	Duplicate Rule for Account records.		
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Duplicate Alert		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Mapped	Matching Criteria	Matching rule for account records. More info
Conditions			
Created By	David Turkstra, 08/08/2018 9:32 AM		Modified By
			David Turkstra, 08/08/2018 9:32 AM

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

- ▶ **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.

All Duplicate Rules Help for this Page

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Account	Standard Account Matching Rule	✓	DTurk	08/08/2018
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	✓	DTurk	08/09/2018
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	✓	DTurk	08/08/2018
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule	<input type="checkbox"/>	autoproc	08/08/2018
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule	<input type="checkbox"/>	autoproc	08/09/2018

2) Disable for Single Installation User

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

Account Duplicate Rule
Standard Account duplicate rule
[Back to List: Duplicate Rules](#)

Duplicate Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

Rule Name	Standard Account duplicate rule	Order	1 of 1 [Reorder]
Description	Duplicate Rule for Account records.		
Object	Account		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Duplicate Alert		
Active	<input checked="" type="checkbox"/>		
Matching Rule	<input checked="" type="checkbox"/> Standard Account Matching Rule <input checked="" type="checkbox"/> Mapped		
Matching Criteria	Matching rule for account records. More info		
Conditions			
Created By	David Turkstra, 08/08/2018 9:32 AM	Modified By	David Turkstra, 08/08/2018 9:32 AM

[Edit](#) [Delete](#) [Clone](#) [Deactivate](#)

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

Conditions
Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	
Current User: Username	not equal to	lmeloche@macraes.com	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

[Save](#) [Save & New](#) [Cancel](#)

- ▶ Repeat for all applicable rules

All Duplicate Rules [Help for this Page](#)

What Are Duplicate Rules? [\[Expand \]](#)

View: [All Duplicate Rules](#)

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	DTurk	08/08/2018
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	DTurk	08/08/2018
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	DTurk	08/08/2018
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule	<input type="checkbox"/>	autoproc	08/08/2018
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule	<input type="checkbox"/>	autoproc	08/08/2018

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.

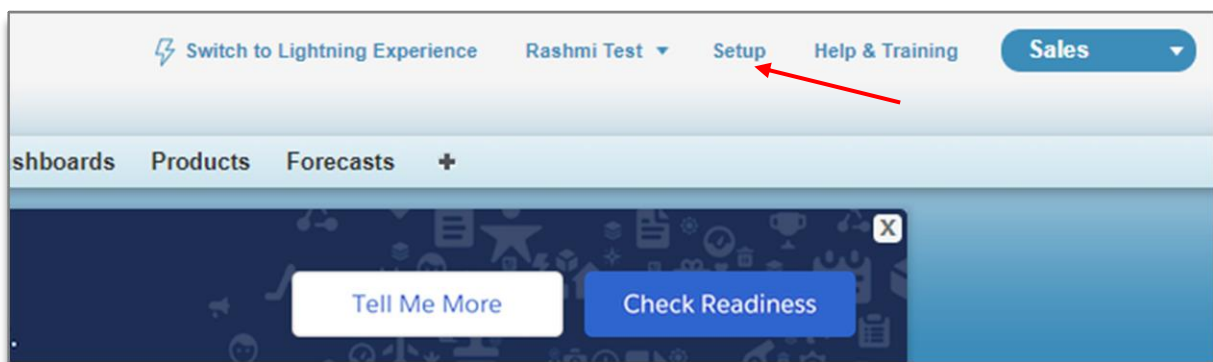
- Identify the Salesforce package's namespace. (Setup > Installed Packages > value in the table under "Namespace Prefix"). This will be referred to as PackageNamespace in the Process Builder instructions.
- Identify the Salesforce package's names for the custom account, contact, and lead objects (Setup > 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.

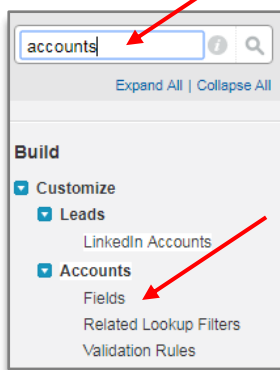
1.13.1 Add the New Account/Lead Source picklist value

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

Account Fields Help for this Page

This page allows you to specify the fields that can appear on the Account page. You can create up to 500 Account custom fields.
Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Account Name	Name	Name		
Edit	Account Number	AccountNumber	Text(40)		✓
Edit	Account Owner	Owner	Lookup(User)		✓
Edit	Account Site	Site	Text(80)		
Replace Edit	Account Source	AccountSource	Picklist		
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)		
	Billing Address	BillingAddress	Address		

► Under Account/Lead Source Picklist Values, click New

Account/Lead Source Picklist Values						
New Reorder Replace Printable View Chart Colors						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit Del Deactivate	Advertisement	Advertisement	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Employee Referral	Employee Referral	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	External Referral	External Referral	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Partner	Partner	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Public Relations	Public Relations	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Seminar - Internal	Seminar - Internal	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Seminar - Partner	Seminar - Partner	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Trade Show	Trade Show	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Web	Web	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Word of mouth	Word of mouth	<input type="checkbox"/>	Assigned dynamically	David Turkstra	08/08/2018 9:32 AM
Edit Del Deactivate	Other	Other	<input type="checkbox"/>	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"

Add Picklist Values
Account/Lead Source

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Scott's Data

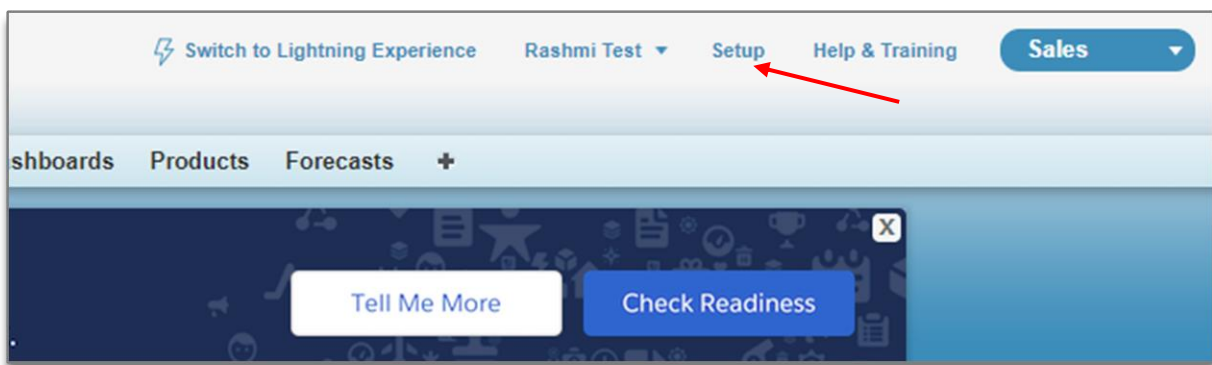
[Save](#) [Cancel](#)

1.13.2 Process Builder

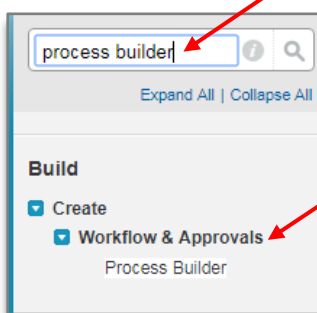
NOTE: This step will be completed 3 times. Once each for Accounts, Contacts, and Leads

Setup

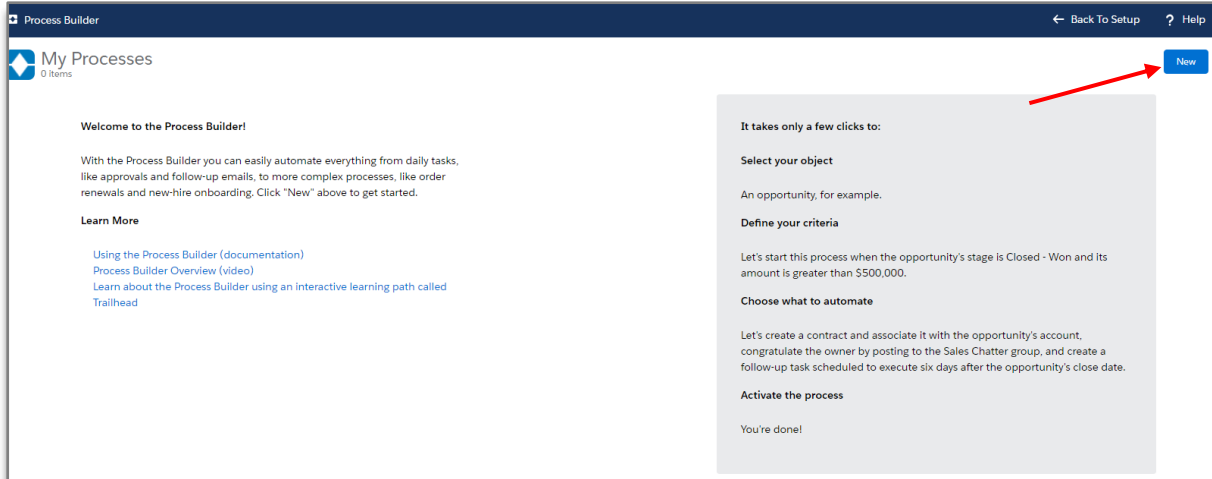
- ▶ Click Setup



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

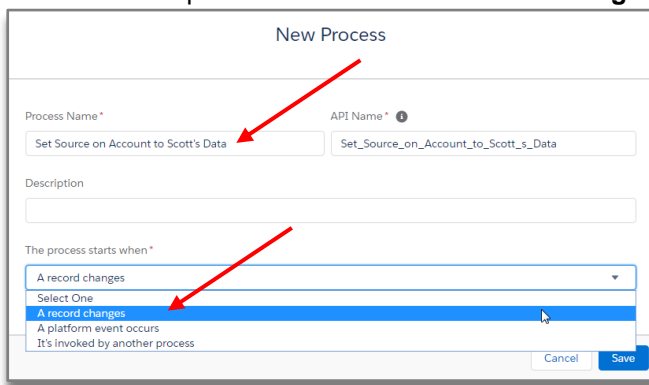


- ▶ Click **New** button



► 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**



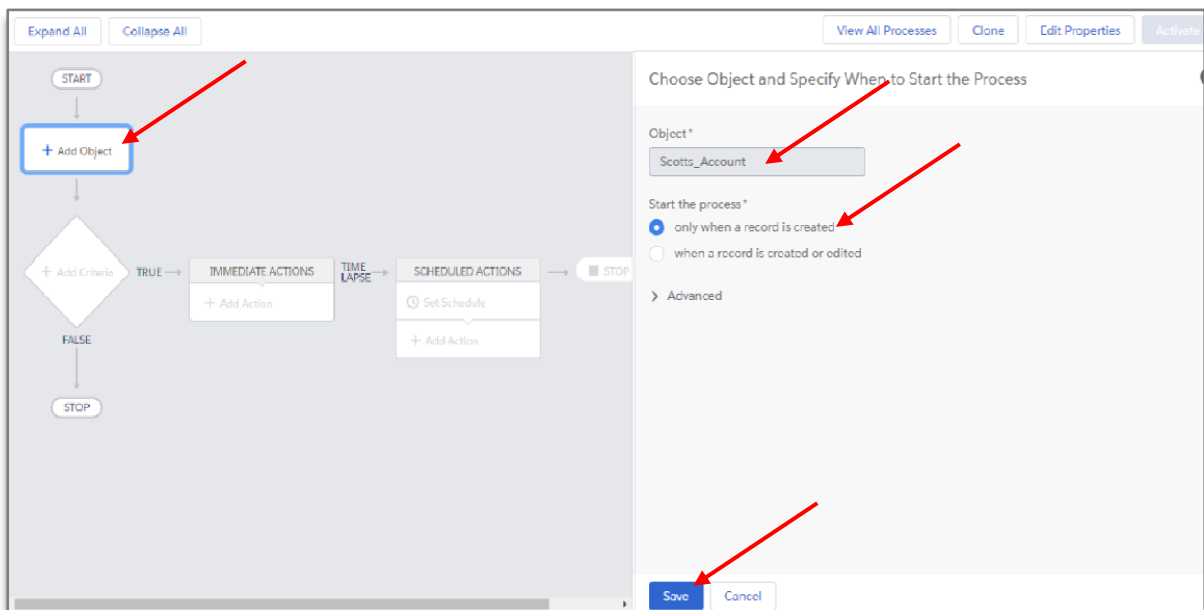
► Click **Add Object**

► 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**

Process Builder - Set Source on Accounts to Scott's Data

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Scotts_Account

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULED ACTIONS

+ Add Action

STOP

FALSE

STOP

Define Criteria for this Action Group

Criteria Name*

Scott's Source = Y

Criteria for Executing Actions*

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*
1	[scotts__scott... Q	Equals	String	Y

+ Add Row

Conditions*

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

Save Cancel

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

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Scotts_Account

Scott's Source... Y

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULED ACTIONS

+ Add Action

STOP

FALSE

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULED ACTIONS

+ Add Action

STOP

FALSE

STOP

Select and Define Action

Action Type*

Update Records

Action Name*

Scott's

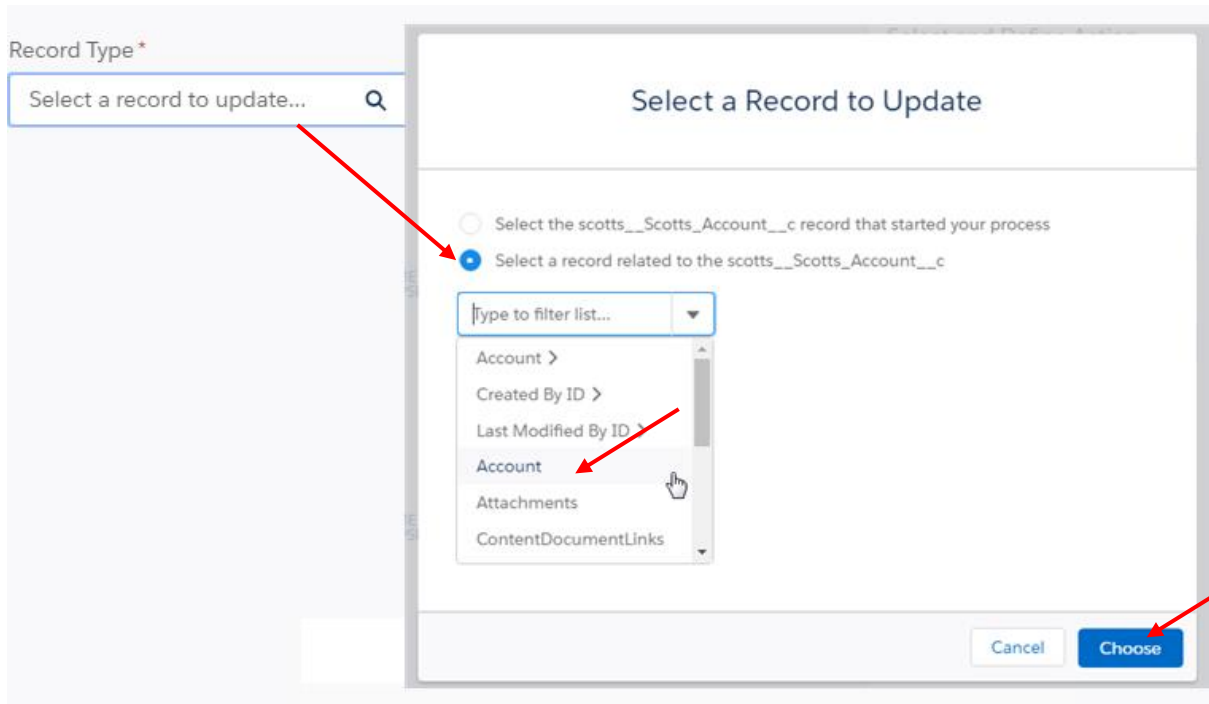
Record Type*

Select a record to update...

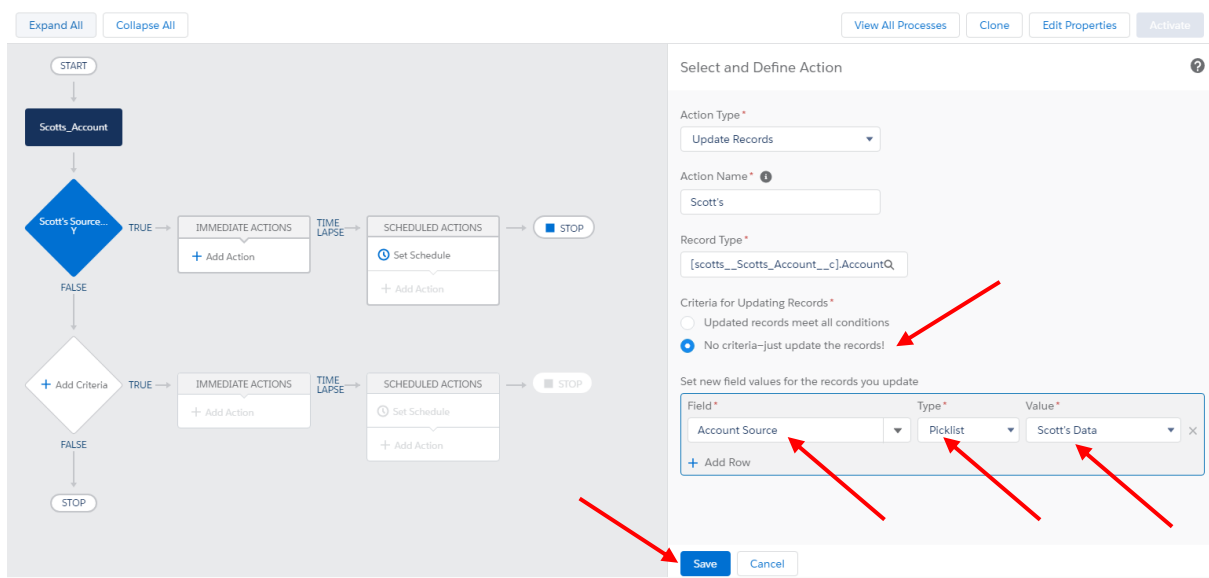
Save Cancel

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

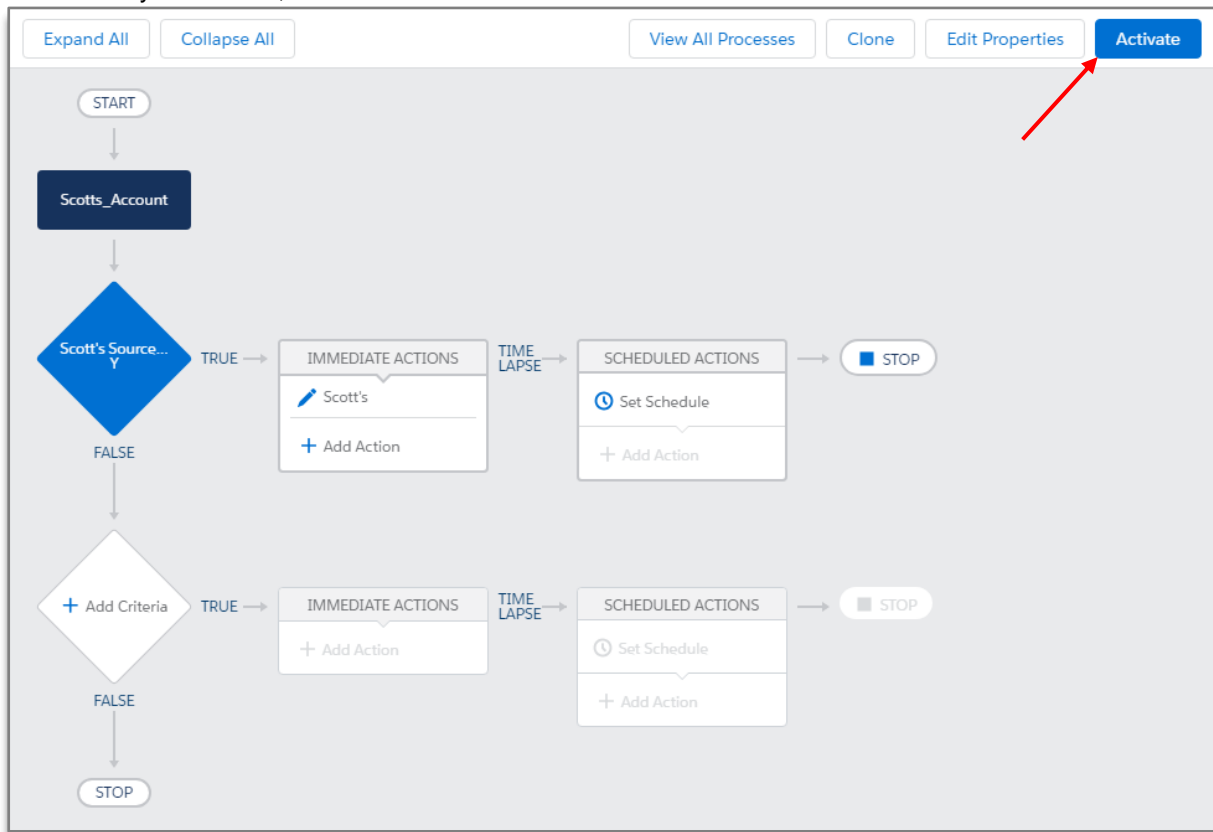
- ▶ Choose **Account | Contact | Lead** depending on process being built. **Do not choose Account > | Contact > | Lead >**
- ▶ Click **Choose**
- ▶ Record Type: **Select a record related to the (Custom Object)**
- ▶ Choose **Account | Contact | Lead** depending on process being built. Do not choose **Account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



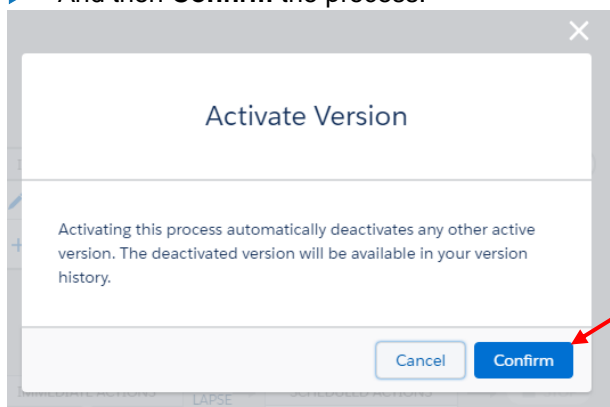
- ▶ Criteria for Updating Records: **No Criteria - just update the records!**
- ▶ Field: For Accounts, choose **Account Source**. For Contacts or Leads, choose **Lead Source**
- ▶ Type: **Picklist**
- ▶ Value: Choose the picklist value created (i.e. Scott's Data)
- ▶ Click **Save**



- 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