# 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

Hello ,			
at has entered an order for Tutorial Order Company to access for package installation information below.	or your Salesforce CRM insta	ance. Pleas	e find the
Details: Package Installation URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=0414100000 Install Key: e5e5d4f7f2a64a87a93ce9c96			
Please click on the package installation URL and enter the install key when prompted. Service for your data license will not start unistallation. Your data license starts on 12/05/2016 and ends on 12/05/2017 so your prompt attention is required.	until you install and approve	the packag	je
If you have any questions regarding this order please contact			
This email was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.			

login.salesforce.com	C	004
SALESFORCE GU	JIDED TOUR	
Want to		
us guide		
Your guided too productivity sta		
clarify, close. Th		i i i i i i i i i i i i i i i i i i i
Take the Tour		
	Sales Coud Lightning G	uided Tour www.
	To get start	ed, how big is your company?
	io get start	ca, now orgina your company.
	1-99 (1995)	*TES
		100 - 999 EMPLOYEES
		·
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A	That Hear	
	salesforce of Want to Us guide Your guided to productivity set	SALESFORCE GUIDED TOUR Want to sell more? Let us guide you. Your guided tour to epic sales productivity starts now. Drill down, clarify, close. Then hit repeat. Take the Tour

#### Log in to Salesforce as an Admin User

# Install for all users

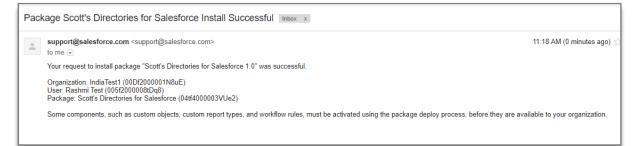
2	2	11	
🔵 Install f	for Admins Only	O Install for All Users	Install for Specific Profiles
App Name	Publisher	Version Name	Version Number
Additional Details	View Components	1.0	1.0 (Beta 10)

Click Done	II			
i Insta	llation Complete!		Don	e
App Name	Publisher	Version Name 1.0	Version Number 1.0 (Beta 10)	

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

This app is taking a long time to install.         You will receive an email after the installation has completed.         Done         Ann Name       Publisher       Version Name       Version Number	Install			
Ann Name Publisher Version Name Version Number	You will rec	<b>s taking a long time</b> eive an email after the	e <b>to install.</b> installation has completed.	Done
	App Name	Publisher	Version Name	Version Number

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



### This is what your screen will look like.

<b>*</b>	All 👻 Q Search Salesforce	🖂 🖬 ? 🌣 🜲 🐻
Lightning Usage	e App Lightning Usage	1
ACTIVITY Lightning Experience Salesforce Mobile	Ughtning Usage Org Lightning Usage	E TE NAMO MATE DI VETTE ANTE E DI NAMO MATE DI NATI E TETE ANTA E DI NAMO MATE
USAGE Switches To Classic	To learn more tips and tricks check out the Lightning Experience R Optimizer to receive a personalized report highlighting exactly how	
Browser Page	Key Metrics	
	Monthly Active Users <b>o</b> Jul. 2018	Daily Active Users Yesterday We can't draw this chart because there is no data.
	Users	
	Monthly Active Users 0	Daily Active Users
	0.9	0.9

#### 1.3 Setup

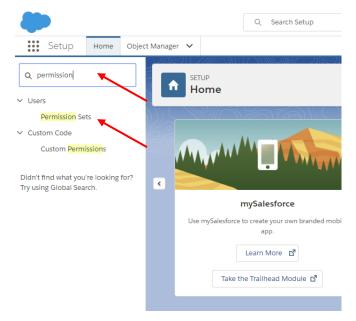
#### Click Setup in the top right corner of Salesforce.

Setup Setup Setup Setup C Setup L Developer Console	🔄 🖬 ? 🏟 单 🌀
Service Setup	Setup 🗹
Developer Console	
	Developer Console

**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 sets" into the quick find / search box.
- Click on the Users -> "Permission Sets" link.



	Click the New button.	
-	SETUP Permission Sets	
	Permission Sets	
	On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets All T Edit   Delete   Create New View	to a user. Download SalesforceA from the App S
	New Q	A   B   C   D   E   F
	Clone <u>CRM User</u>	Denotes that the user is a Sales Cloud or Service

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

Click the Save button.

SETUP Permission Sets			
Permission Set Create			Help for this Page 🥹
	Save		
Enter permission set information			= Required Information
Label	Scott's_Permissions		
API Name	Scott's_Permissions	i	
Description Session Activation Required			
Select the type of users who will u	ise this permission set		
<ul> <li>Choose a specific user license if you</li> </ul>	n this permission set to multiple users with different user and permission set licenses. want users with only one license type to use this permission set. ase if you want this permission set license auto-assigned with the permission set. is? <u>Learn more here.</u> None		
	Save Cancel		

# Click the Object Settings link.

SETUP Permission Sets		
Permission Set Scott's_Permissions		Video Tutorial   Help for this
Q, Find Settings 🛞   Clone Delete Edit	Properties Manage Assignments	
Permission Set Overview		
Description	API Nam	<ul> <li>Scott_s_Permissions</li> </ul>
License	Namespace Prefi	ς
Session Activation Required		
Created By Sonika test, 25/07/2018	2:45 AM Last Modified B	<u>Sonika test</u> , 25/07/2018 2:45 AM
Apps	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	
<b>`</b>	Object Settings Permissions to access objects and fields, and settings such as tab availability	
	<u>App Permissions</u> Permissions to perform app-specific actions, such as "Manage Call Centers"	
Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform Learn More	<u>Apex Class Access</u> Permissions to execute Apex classes	
	<u>Visualforce Page Access</u> Permissions to execute Visualforce pages	
	External Data Source Access Permissions to authenticate against external data sources	

**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. Eg. Scotts\_Account\_Leads Click on the first Scott's object.

Permission Sets			
Permission Set Scott's_Permissions			Video Tutorial   Hel
Q. Scotts_ 8 Clone Delete	Edit Properties Manage Assignments		
Permission Set Overview > Object Settings			
Object Name Scotts Account Leads	Object Permissions No Access	Total Fields 60	Tab Settings
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	

# **Click** the **Edit** button.

Permission S	ets	
ermission Set Scotts_permissions		-3///
Q Find Settings	8 Clone Delet	Edit Propertie
ermission Set Overview > Obje Scotts_Account_Leads bject Permissions	ect Settings 💌 Sco	Edit
Permission Name	Enable	ed
Read		
Create		
Edit		
Delete		
View All		
Modify All		
would be		
ield Permissions		
Field Name	Read Access	Edit Access
# of Employees		
# of Employees Address Line 1		
Address Line 1		
Address Line 2		
Address Line 1 Address Line 2 Business Type		
Address Line 1 Address Line 2 Business Type City		
Address Line 1 Address Line 2 Business Type City Company Legal Name		

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.

SETUP Permission	Sets			
Permission Set Scotts_permissions	6		×==9//	
Q Find Settings	× Clone	e Delet	te Edit P	ropertie
ermission Set Overview > Ob Scotts_Account_Leads	j <u>ect Settings</u> 🔻	Sco	otts_Acc	count_
Dbject Permissions		Enable	od	
Read		Enable	ea	
Create				
Edit				
Delete		<ul> <li>Image: A start of the start of</li></ul>		
View All				
Modify All				
ield Permissions Field Name	Read A	Access	Edit Ac	cess
# of Employees				
Address Line 1				
Address Line 2				
Business Type				
City				
Company Legal Name				
Company Name				
Country				

**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; }</pre>
```

Repeat the above steps for all other custom objects associated with the package that is being installed.

Permission Set Scotts Permissions							
Q. 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	Image: A start and a start						
Create	Image: A start and a start						
Edit	Image: A start and a start						
Delete	<b>I</b>						

# Other custom objects may include accounts, custom contact or lead objects.

Scott's Permissions								
Q Find Settings 8 Clone Dele	Edit Properties Manage Assignments							
ermission Set Overview > Object Settings 💌								
Object Settings								
Dbject 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						

#### 1.5 Enable the Prospecting Tab

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

Permission Set Scott's Permissions								
C Find Settings								
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.

SETUP Permissic	on Sets
Permission Set Scotts_permission	ons
Permission Set Overview >	Clone Delete Edit Properties Manage Assignments      Object Settings      Scotts Prospecting
Scotts Prospecting	Save Cancel
Available	Visible

1.6 Assign the Permission Set

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

SETUP Permission Se	ts	
Permission Set Scotts_permissions		
Q Find Settings	Clone Delete Edit Prop	erties Manage Assignments
Permission Set Overview > Object	Settings  Scotts Prospe	ecting
Scotts Prospecting	Edit	
Tab Settings		
Available	Visible	
1 i	1	

Click the Manage Assignments button.

SETUP Permission S	Sets	
Permission Set Scotts_permissions		Video
Q, Find Settings	Clone Delete Edit Properties Manage Assignments	
Permission Set Overview		
Description	API Name	Scotts_permissions
License	Namespace Prefix	
Session Activation Required		
Created By	Sonika test, 26/07/2018 9:46 AM Last Modified By	Sonika test, 26/07/2018 10:17
Apps		
	Assigned Apps Settings that specify which apps are visible in the app menu	

# Click the Add Assignments button.

SETUP Users				×== q///		ann c - ke	=======================================
Assigned Users Scotts_permissi « Back to: Permission Set	ions						Help
		Add Assignme		E F G H I J	I K L M N C	)   P   Q   R   S   T	UIVIWIXIY
		Username	Last Login	Role			
Full Name 1	Alias	ocomanio	Last Login	Role	Active	Profile	Manager
Full Name * No records to display.	Alias	coornanio	Last Login	Role	Active	Profile	Manager
	Alias	Add Assignmen		Role	Active	Profile	Manager

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

Click	the Assign	n Dutto	on.					
	etup <b>Jsers</b>							
Assign Users All USE View: A	rs	Create New \	<i>liew</i>					Help for this Pa
			A   B   C   D	E   F   G   H   I	J   K   L   M   N   O   P	Q   R   S	S T U	V   W   X   Y   Z   Oth
			Assign Cancel					
Action	Full Name 🕈	Alias	Username		Last Login	Role	Active	Profile
🔲   Edit	Chatter Expert	<u>Chatter</u>	chatty.00df2000001n8v4eac.cttlleo4oq9p@chatter.salesforce.cd	:om			$\checkmark$	Chatter Free User
🔲   Edit	Integration, CPQ	cpqusr	cpgintegration@00df2000001n8v4eac.ext				$\checkmark$	CPQ Integration User
🗹 Edit	test, Sonika	stest	sonikas@owen-media.com		26/07/2018 7:52 AM		$\checkmark$	System Administrator
🔲   Edit	Turkstra, David	DTurk	dturkstra+indiatest2@owen-media.com		24/07/2018 1:32 PM		$\checkmark$	System Administrator
			Assign Cancel					

#### 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 Installed Packages link.

Q Installed packages	Installed Packages							
Installed Packages	Installed Packages Heb for this Page 🥹							
Didn't find what you're looking for? Try using Global Search.	On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages. Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy. Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.							
	Installed Packages       Action     Package Name     Publisher     Version Number     Namespace Prefix     Status     Allowed Licenses     Expiration Date     Install Date     Limits     Apps     Tabs     Obj       Uninstall   Manage Licenses     South Status     Directories for Salesforce     Leadforce     1.0     scotts     Trial     1     01/08/2018     25/07/2018     0     2							

#### Click the Manage Licenses link next to the package name.

Installed Packages												Help for t			
On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages. Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.										salesfo	rce appe				
Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses. Installed Packages									Visit	t AppExcł					
l	Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExcha
	Uninstal   Manage Licenses 🛃	<u>Scott's</u> Directories for Salesforce	Leadforce	1.0	scotts	Trial	1	1	03/08/2018	27/07/2018 1:47 AM		0	2	6	Not Passe

### Click the Add Users button.

Package Details Scott's Directories for Sa Back to Previous Page	alesforce				Help for this Page 🥝
Package Name	Scott's Directories for Salesforce			Publisher	Leadforce
Status A	Active			Allowed Licenses	4
Expiration Date	Does not Expire	_		Used Licenses	1
	4			A   B   C   D   E   F   G   H   I	$\label{eq:relation} I \mid J \mid K \mid L \mid M \mid N \mid O \mid P \mid Q \mid R \mid S \mid T \mid U \mid V \mid W \mid X \mid Y \mid Z \mid Other  \textbf{All}$
Licensed Users	Add Users	Remove Multiple Users			
Action Full Name +	Role		Active	Profile	
Remove Meloche, Lori			$\checkmark$	System Administrator	

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

~				11+0+1+1+1×1+1+E+0mor 5×m
Available Users	Select Shown Deselect Shown Deselect All Add All Users			
Action Full Name +	Role	Active	Profile	
user, standard		✓	Standard User	
Selected Users				
Action	F	uli Name		
No rows selected				
Add Cancel				



# **1.8 Configure Connected App Permissions**

Search for "connected apps" (Do not press Enter).
 Click "Manage Connected Apps"

Q connected apps	SETUP Perm
✓ Apps	TIC ( NOW
<ul> <li>Connected Apps</li> </ul>	Dermissis
Connected Apps OAuth U	Permissio
Manage Connected Apps	On this page you c
	In addition, you ca
Didn't find what you're looking for? Try using Global Search.	All <b>v</b> Edit   Dele
	New
	Action
	Clone

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

	cess to apps that connect to this Salesforce or	ryanization.		
		·		
Арр Ас	cess Settings	Edit		
<ul> <li>Allow</li> </ul>	vusers to install canvas personal apps			
Allow	v users to install canvas personal apps			
	vusers to instali canvas personal apps			
View:				
			A	8   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T
View:			A   Application Version	B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   Permitted Users
	All V Create New View			

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

Connected App Scotts Data			Help for this Page ਓ
Connected App Edit			
<b>O</b> ,		Version 2 Description	
Basic Information			= Required Information
Start URL	1	Mobile Start URL	1
OAuth policies			
Permitted Users Enable Single Logout	Admin approved users are pre-authorized  Admin approved users are pre-authorized	IP Relaxation Refresh Token Policy:	Enforce IP restrictions
Session Policies			
Timeout Value	None V		High assurance session required
Custom Connected App Handler			
Apex Plugin Class Run As	93 i 93 i		
User Provisioning Settings			
Enable User Provisioning 1			
	Save Cancel		

# Click on the Master Label link for the connected app – Scott's Data.

	ected Apps	tion.		Help1	for this Page 💡
Арр Асс	cess Settings	Edit			
Allow	users to install canvas personal apps				
View:	II ▼] <u>Create New View</u>		A   B   C   D	E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y	Z Other All
Action	Master Label ↑	Applica	ation Version	Permitted Users	
Edit	CPQ Integration User Connected App	1.0		Admin approved users are pre-authorized	
Edit 🛃	Scotts Data	2.0		Admin approved users are pre-authorized	



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

SETUP	
Session Policies	
Timeout Value	
Custom Connected App Handler	
Apex Plugin Class	
Run As	
User Provisioning Settings	
Enable User Provisioning	
No application-defined IP ranges	
Profiles	Manage Profiles
No profiles associated with this app.	
Permission Sets	Manage Permission Sets
Permission Sets No permission sets associated with this app.	Manage Permission Sets
	Manage Permission Sets New
No permission sets associated with this app.	
No permission sets associated with this app. Custom Attributes	

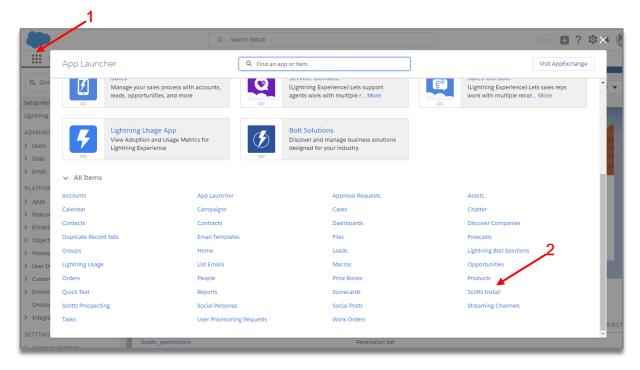
Select the checkbox next to your permission set: "Scott's Permissions"
 Click the Save button.

CIICK	tne	Save	button.	

« Back to Connected App Detail	sion Set Assignment		Help for this Page 🥹
Select	Permission Sets Scotts permissions	Description	Save Cancel

#### **1.9 Authenticate Installation Key**

Click the App Launcher icon on the top left of the menu bar. Click the Data App link - Scott's Install



# Package installation request To: Hello, at \_\_\_\_\_ has entered an order for Tutorial Order Company to access \_\_\_\_\_\_ for your Salesforce CRM instance. Please find the

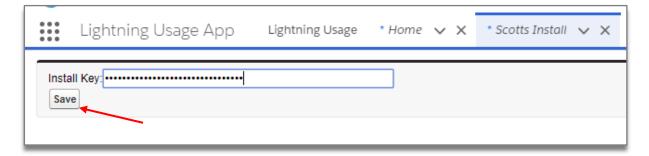
package installation information below. Details: Package Installation URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04l4100000 Install Key: e5e5d4f7f2a64a87a93ce9c96

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

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

Enter the installation key from the order email.

Click the Save button.



🖹 Inbox - Google 11:13 AM

0

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

# Authentication successful

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

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ø	Setup		ď		MilC
\$	Service Se	100	etup	:e 🖣	•
Deve	loper Cons	ole		K	

**NOTE:** Salesforce has a setting that will restrict users from logging in from outside trusted IP address ranges. If this setting is enabled, you may encounter an "Authentication Failed" error during installation. If so, please add these IP Addresses to the list of trusted IP addresses in Salesforce. 52.44.250.212 52.55.250.218 52.70.95.167

More information on how to set trusted IP ranges can be found on Salesforce Help: Restrict Where and When Users Can Log In to Salesforce Set Trusted IP Ranges for Your Organization

### 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 "object manager" into the quick find / search box. (Do not press Enter).
- Click "Object Manager"

Setup Home Object	Manager 🗸
Q object manager	SETUP Home
<ul> <li>Objects and Fields</li> </ul>	Home
Object Manager	
Didn't find what you're looking for? Try using Global Search.	

# Click on the "Account" link.

Setup Home <u>Obje</u>	ect Manager 🗸
SETUP Object Manager 39 Items, Sorted by Label	
LABEL	API NAME DESCRIPTION
Account	Account
Activity	Activity
Asset	Asset
Asset Relationship	AssetRelationship
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Contact	Contact
Content Version	ContentVersion
Contract	Contract
Duplicate Record Item	DuplicateRecordItem
Duplicate Record Set	DuplicateRecordSet
Email Message	EmailMessage

- Click "Page Layouts" in the menu.
   Click the "Account Layout" link.

Setup Home C	object Manager 🛛 🗸		MST (Mesticite Maconite - Missio)
SETUP > OBJECT MANAG	ER		
Details Fields & Relationships	Page Layouts 1 Items, Sorted by Page Layout Na		Q. Quick Find New
	PAGE LAYOUT NAME	<ul> <li>CREATED BY</li> </ul>	MODIFIED BY
Page Layouts	Account Layout	David Turkstra, 7/24/2018, 11:52 AM	David Turkstra, 7/24/2018, 11:52 AM
Lightning Record Pages			
Buttons, Links, and Actions		•	
Compac <mark>t</mark> Layouts			
Object Limits			
Record Types			
Related Lookup Filters			
Search Layouts			
Triggers			
Validation Rules			
Hierarchy Columns			

On the top left selection scroll down and Click "Visualforce Pages" 

Account Layout <del>-</del>	
Save V Quick Save Preview As	▼ Cancel 🛛 📣 Undo 🗛 Redo 🛛 🗮 Layout Properties
Nobile & Lightning	Quick Find Page Name
Expanded Lookups	▶ Blank Space
Related Lists Report Charts	AccountMatch
Components Visualforce Pages	

Create a new section by dragging "Section" from the top to the layout below, place it below "Custom Links" section.

Fields Related Lookup Filters	Save 🔻 Quick Save Preview As * Cancel 🔊 Undo 💿 Redo 💼 Layout Properties
Validation Rules Triggers Partner Roles Contact Roles on Accounts Page Layouts Field Sets	Custom Links Quick Kadions Salesforce1 & Lightning Actions Expanded Lobtups Related Lists Report Charts Visualforce Pages
Compact Layouts Search Layouts Buttons, Links, and Actions Record Types Limits Account Teams Account Team Member Layout Account Team Member Layout	US US Additional Information (Header visible n edit only) Customer Priority Sample Cus mer Priority Sample Cus mer Priority SLA Serial Number SLA Expiration Date 12/7/2016 SLA Serial Number Upsell Opportunity Sample Upsell Opportunity Sample Upsell Opportunity Active Sample A ve
D&B Companies     Contacts     Contacts     Opportunities     Sales Path     Quotes     Forceasts     Social Media     Cases	System Information (Header visits on edit only)     Image: Created By Sample User       Description Information (Header visits on edit only)     Description       Description Samp Description     Image: Cleater only (Vicio)       Billing     Section
Entitlement Management	Mobile Cards (Salesforce1 only)

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

Section Properties	/	×
Section Name	Scott's Data	
Display Section Header On	🕑 Detail Page	
	🕑 Edit Page	
Layout		
I-Column 2-C	Column	
	OK Cancel	

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

Customize	Save * Quick Save Preview As	s 🔻 Cancel 🛛 🛷 Unde	o 🕼 Redo 🛛 💼 Layout Properties	
Tab Names and Labels     Home     Activities     Compaigns     Leads     Fields     Related Lookup Filters			click and drag	www.salestorce.com
Validation Rules		nple Account Site	Ticker Symbol	Sample Ticker Symbol
Triggers Partner Roles		nple Type	Ownership	Sample Ownership
Contact Roles on Accounts		nple Industry	Employees	91,297
	Annual Revenue \$12	3.45	SIC Code	Sample SIC Code
Page Layouts	Address Information (Header	r visible on edit only)		
Field Sets Compact Layouts Search Layouts	Billing Address Suit	te 300, The Landmark n Francisco, CA 94105	) One Market Shipping Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
Buttons, Links, and Actions Record Types Limits Account Teams Account Team Member Layout Account Settings	SLA Expiration Date 12/7 Number of Locations 830	nple Customer Priority 7/2016	SLA SLA Serial Number Upsell Opportunity	Sample SLA Sample SLA Serial Number Sample Upsell Opportunity
D&B Companies	System Information (Header	visible on edit only)		
Contacts	Created By San		Last Modified By	Sample User
Notes				
Opportunities	Description Information (Hea			
Sales Path	Description San	nple Description		
Quotes	Custom Links (Header not vis	(alda)		
Forecasts	E Guatom Elines (Header Not Vis Billing	1010)		
Social Media				
Cases	1			
<ul> <li>Entitlement Management</li> </ul>		4	AccountMatch	
Self-Service				
Call Cantor	1			

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

**Click** the wrench.

Scott's
VP AccountMatch

- Change the **Height** to at least **400.** We recommend **800** so there is no scrolling.
- Check "Show Scrollbars"
- **Click** the **OK** button.

Visualforce Page Pro	operties	×
Width (in pixels or %) Height (in pixels) Show scrollbars Show label	100% 800	
0	K Cancel	

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

Account Layout -	Mini Page Layout Mini Console View   Video Tutorial Help for this Page 🥐
Save 🔻 Quick Save Preview As V Cancel 🔊 Undo 🛝 Redo 🗐 Layout Properties	
Fields Buttons Custom Links Quick Actions AccountMatch AccountMatch	
Account Sample Highlights Panel	
Customize the highlights panel for this page layout	
Quick Actions in the Salesforce Classic Publisher         i         Post       File       New Task       New Contact       New Case       Log a Call       New Note       I         Link       Poll       Question       Email	New Opportunity New Event Thanks

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

Setup Home Object Manager	<b>~</b>
SETUP	DRASH (- 77775-11677-1880) 70077 780
Soliect Manager	
51+ Items, Sorted by Label	
Contact	Contact
Contact Point Type Consent	ContactPointTypeConsent
Contact Request	ContactRequest
Content Version	ContentVersion
Contract	Contract
Customer	CHANNEL_ORDERSCustomerc
Customer Order Product History	CHANNEL_ORDERSCustomer_Order_Product_Historyc
Data Use Legal Basis	DataUseLegalBasis
Data Use Purpose	DataUsePurpose
Duplicate Record Item	DuplicateRecordItem
Duplicate Record Set	DuplicateRecordSet
Email Message	EmailMessage
Event	Event
Hub Invitation	EnvironmentHubInvitation
Hub Member	EnvironmentHubMember
Image	Image
Individual	Individual
Lead	Lead

### 1.11 Configure Custom Object Layouts (optional)

\*\*Scott's has already configured this Scott's Section so nothing is needed for this install, but the following is if you want to make any changes to this section.

Type "object manager" into the quick find / search box (Do not press Enter).



#### Click the custom object associated with the account - example: Scotts\_Account

SETUP Object Manager 61 Items, Sorted by Label			Q Quick Find	Schema Builder	Create 🔻
Scotts_Account	scottsScotts_Accountc	06/11/201	19 🗸	~	•
Scotts_Account_Lead	scottsScotts_Account_Leadc	06/11/201	19 🗸	~	-
Scotts_Contact	scottsScotts_Contactc	06/11/201	19 🗸	~	•
Scotts_Contact_Lead	scottsScotts_Contact_Leadc	06/11/201	19 🗸	~	•

Click Page Layouts in the menu.

Click the custom object Layout link - example: Scotts\_Account Layout

SETUP > OBJECT MANAGER Scotts_Account				
Details Fields & Relationships	Page Layouts 1 Items, Sorted by Page Layout Name			Q Quick Find
Fields & Relationships	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Page Layouts	Scotts_Account Layout	Lori Meloche, 6/13/2019, 12:06 PM	Lori Meloche, 6/13/20	19, 12:06 PM
Lightning Record Pages Buttons, Links, and Actions				

Drag fields from the list to the layout below.

Any fields can be selected, however only fields the customer has licensed in their order will be populated.

Click "Save"

Repeat these steps for any other custom objects, most likely Leads and Contacts.

# THIS COMPLETES THE BASIC INSTALLATION OF YOUR SCOTT'S FOR SALESFORCE DATA PACKAGE.

#### 1.12 Disable Duplicate Detection (optional)

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.

Installations have a configuration option where new records can be created (1) always using the credentials of the user who installed the package, regardless of which user is adding the new records or (2) using the credentials of the salesforce user who is adding the new records. Please ask your sales rep how your installation is configured.

If the order is configured to use the credentials of the user who is doing the installation, duplicate detection should be disabled for the installation user.

If the order is configured to use the credentials of the user who is adding the new records, duplicate detection should be disabled for all users who have access to add new records through the package.

Alternatively, duplicate detection could be disabled for all users in the salesforce org.

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	Service Setup :e 🔻
	Developer Console

# Click Setup



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

Setup	Home	Obje		
Q duplicate rules				
∨ Data				
✓ Duplicate Management				
Duplicate R	ules			

# 1) Disable for All Users

For each duplicate rule, click the rule name link

Duplicate Rules						Help for this Pag
/hat Are Duplicate Rules?						[ Expan
: All Duplicate Rules 🔹			ABCDEFGH	J K L M		T   U   V   W   X   Y   Z   Othe
Rule Name †	Description	New Rule V	Matching Rule	Active		Last Modified Date
	Description Duplicate Rule for Account records.					
Standard Account duplicate rule		Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Object Account	Matching Rule Standard Account Matching Rule	Active	Last Modified By DTurk	Last Modified Date 08/08/2018
Rule Name + Standard Account duolicate nule Standard Lead duplicate nule Standard Lead duplicate nule Standard Rule for Contacts with Duplicate Leads	Duplicate Rule for Account records. Duplicate Rule for Contact records.	Object Account Contact	Matching Rule Standard Account Matching Rule Standard Contact Matching Rule	Active	Last Modified By DTurk DTurk	Last Modified Date 08/09/2018 08/08/2018

#### Click Deactivate this will disable the rule

Account Duplicate Rule Standard Account duplicat « Back to List: Duplicate Rules	ie rule	
Duplicate Rule Detail	Edit Delete Clone Deactivate	
Rule Name	Standard Account duplicate rule Order	1 of 1 [ Reorder ] i
Description	Duplicate Rule for Account records.	
Object	Account	
Record-Level Security	Enforce sharing rules	
Action On Create	Allow Operations On Create	🖌 Alert 🖌 Report
Action On Edit	Allow Operations On Edit	Alert 🗹 Report
Alert Text	Duplicate Alert	
Active	$\checkmark$	
Matching Rule	Standard Account Matching Rule S 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 Ctone 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.

Il Duplicate Rules						Help for this Pag
What Are Duplicate Rules?						[ Expan
w: All Duplicate Rules						T   U   V   W   X   Y   Z   Other
			ADUDEFGH	JAKLW	N O F Q N S	1 0 0 0 0 0
	•	New Rule V	ADCDEFGH	I J K L M	N O P Q N 3	1 0 0 0 W X 1 2 000
Rule Name †	Description	New Rule	Matching Rule	Active	Last Modified By	Last Modified Date
Rule Name + Standard Account duplicate rule	Description Duplicate Rule for Account records.					
		Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account duplicate rule	Duplicate Rule for Account records.	Object Account	Matching Rule Standard Account Matching Rule	Active	Last Modified By DTurk	Last Modified Date 08/08/2018
Standard Account duplicate rule Standard Contact duplicate rule	Duplicate Rule for Account records. Duplicate Rule for Contact records.	Object Account Contact	Matching Rule Standard Account Matching Rule Standard Contact Matching Rule	Active ✓	Last Modified By DTurk DTurk	Last Modified Date 08/08/2018 08/08/2018

#### 2) Disable for Single Installation User

For each duplicate rule, click the rule name and select "Edit"

Account Duplicate Rule Standard Account duplicat « Back to List: Duplicate Rules	re rule	
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	🖌 Alert 🖌 Report
Action On Edit	Allow Operations On Edit	Alert Keport
Alert Text	Duplicate Alert	
Active	$\checkmark$	
Matching Rule	Standard Account Matching Rule S 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 ▼ Imeloche@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						
			A   B   C   D   E   F   G	HIIJKILM	N   O   P   Q   R   S	T   U   V   W   X   Y   Z   Other All
		New Rule 🔻				
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	1	DTurk	08/08/2018
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	1	DTurk	08/08/2018
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	1	DTurk	08/08/2018
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule		autoproc	08/08/2018
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule		autoproc	08/08/2018

### 1.13 Set up Lead Source with Process Builder (optional)

THIS 1.13 SECTION IS ONLY NECESSARY IF YOU WOULD LIKE TO TAG IN THE LEAD SOURCE FIELD THAT THE LEAD WAS CREATED BY SCOTT'S DATA.

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.

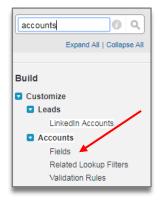
1.13.1 Add the New Account/Lead Source picklist value (optional)

**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

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Developer Console

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



Click Account Source field link

Account	t Fields				Help for this Page
This page allow	ws you to specify the fields that can ap	pear on the Account page. You can create u	p to 500 Account custom fields.		
lote that delet	ting a custom field will delete any filters	that use the custom field. It may also chang	e the result of Assignment or Escalation Rules that rely	on the custom field data.	
			Set History Tracking		
Account Sta	andard Fields				Account Standard Fields Help @
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Account Name	Name	Name		1
Edit	Account Number	AccountNumber	Text(40)		
Edit	Account Owner	Owner	Lookup(User)		✓
Edit	Account Site	Site	Text(80)		
Replace   Edi	t Account Source	AccountSource	Picklist		
Edit	Annual Revenue	AnnualRevenue	Currency(18, 0)		
	Billing Address	BillingAddress	Address		

Account/Lead So	urce Picklist Values	New Reorder R	eplace Printable View	Chart Colors V	Account/Lead Source Picklist Values Help
Action	Values	API Name	Default	Chart Colors	Modified By
Edit   Del   Deactivate	Advertisement	Advertisement	0	Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit   Del   Deactivate	e Employee Referral	Employee Referral		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit   Del   Deactivate	e 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	e Seminar - Internal	Seminar - Internal		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit   Del   Deactivate	e 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	e Web	Web		Assigned dynamically	David Turkstra, 08/08/2018 9:32 AM
Edit   Del   Deactivate	e 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"

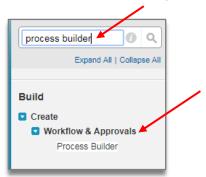
Add Picklist Values Account/Lead Source
Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.
If a value matches an inactive value's API name, that value is reactivated with its previous label.
If a value matches an inactive value's label but not the API name, a new value is created.
Scott's Data
Save Cancel

# 1.13.2 Process Builder (optional)

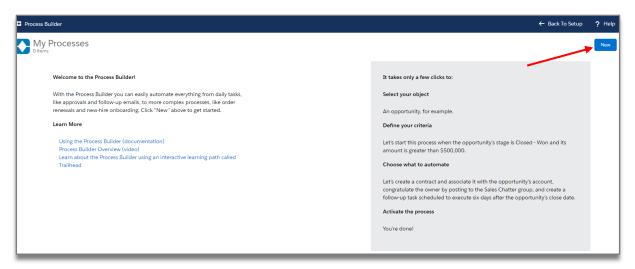
**NOTE:** This step will be completed 3 times. Once each for Accounts, Contacts, and Leads Setup

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	Service Setup :e
	Developer Console

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*).

	New Process
Process Name *	API Name* 🚺
Set Source on Account to Scott's Data	Set_Source_on_Account_to_Scott_s_Data
Description	
The process starts when *	
The process starts when * A record changes	
	· · ·
Select One A record changes	
A record changes Select One	\$

#### 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

Expand All Collapse All	View All Processes Clone Edit Properties Activate
STAR       + Add Object       + Add Criteria       TRUE →       IMMEDIATE ACTIONS       LAPSE →       SCHEDULED ACTIONS       + Add Action       © Set Schedule       + Add Action       STOP	Choose Object and Specify When to Start the Process          Object*         Scottz_Account         Start the process*         Image:





- 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	← Back To Setup ? Help
Expand All Collapse All	View All Processes         Clone         Edit Properties         Activate
START	Define Criteria for this Action Group
Sotts Account       + Add Criteria       FALSE       + Add Action         FALSE         • Add Action         • Add Action	Criteria Name* Scott's Source = Y Criteria for Executing Actions Conditions are met Conditions are met No criteria-just execute the actions! Set Conditions Conditions Conditions* All of the conditions are met (AND) Ary of the conditions are met (AND) Customize the logic
javascriptvoid(0);	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) Select and Define A	Action @
Action Type * Update Records	
Action Name*	
Scott's Source TRUE -> IMMEDIATE ACTIONS TIME LAPSE-> SCHEDULED ACTIONS -> SCHEDULED ACTIONS -> Record Type*	
+ Add Action Set Schedule Select a record to upda	ate Q
FALSE + Add Action	
+ Add Criteria TRUE → IMMEDIATE ACTIONS TIME LAPSE → SCHEDULED ACTIONS → STOP	
+ Add Action O Set Schedule	
FALSE + Add Action	
, 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

ecord Type* Select a record to update Q	Select a Record to Update				
	Select the scotts_Scotts_Account_c record that started your process Select a record related to the scotts_Scotts_Account_c [Type to filter list Account > Created By ID > Last Modified By ID Attachments ContentDocumentLinks				
	Cancel				

- 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

Expand All Collapse All	View All Processes Clone Edit Properties Activate
START	Select and Define Action
Scott's Source- V TRUE $\rightarrow$ T	Action Type * Update Records  Action Name *  Scott's  Record Type *  [scotts_Scotts_Accountc] AccountQ  Criteria for Updating Records *  Updated records meet all conditions  No criteria-just update the records!
+ Add Criteria TRUE → IMMEDIATE ACTIONS IMPE + Add Action ScheDuleD ACTIONS → STOP	Set new field values for the records you update  Field* Type* Value* Account Source Picklist Source Cancel Cancel

	Review your entries	, and click <b>Activa</b>	te				
	Expand All Collapse All			View All Processes	Clone	Edit Properties	Activate
	START						
	Scotts_Account						
	Scott's Source	IMMEDIATE ACTIONS	TIME LAPSE	SCHEDULED ACTIONS		)	
		✓ Scott's		Set Schedule			
	FALSE	+ Add Action		+ Add Action			
	+ Add Criteria TRUE $\rightarrow$	IMMEDIATE ACTIONS	TIME LAPSE	SCHEDULED ACTIONS			
		+ Add Action					
	FALSE			+ Add Action			
	STOP						
5			_				
	And then <b>Confirm</b> the	ne process.	×				
I	Activat	e Version					
+	Activating this process automati version. The deactivated version history.						
horry	LODATE ACTIONS LAPSE	Cancel	Confirm				

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

# 1.13.3 Salesforce IP Restrictions

**NOTE:** Salesforce has a setting that will restrict users from logging in from outside trusted IP address ranges. If this setting is enabled, you may encounter an "Authentication Failed" error during installation.

Please add these IP Addresses to the list of trusted IP addresses in Salesforce.



52.44.250.212 52.55.250.218 52.70.95.167

More information on how to set trusted IP ranges can be found on Salesforce Help: Restrict Where and When Users Can Log In to Salesforce Set Trusted IP Ranges for Your Organization