

SCOTTS FOR SALESFORCE APP INSTALLATION

1.1 Overview

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

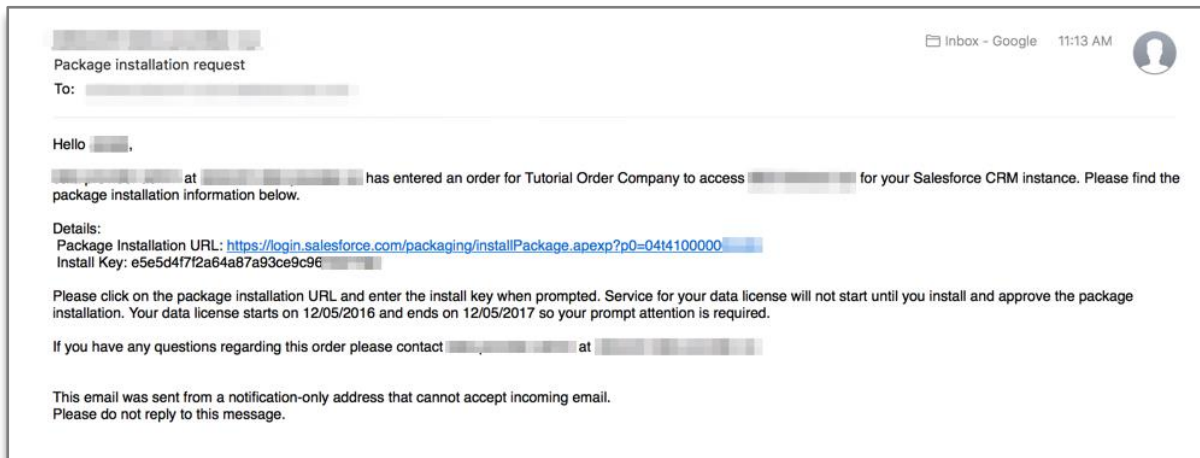
What you'll need: package installation URL and install key from order email
Salesforce user with admin permissions

Estimated time to complete: 15-20 minutes

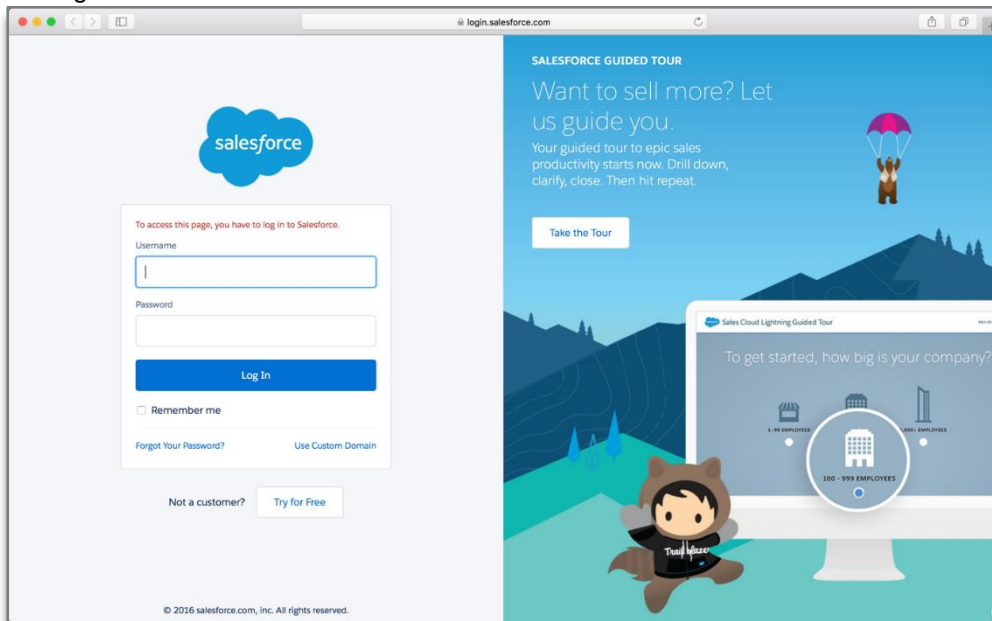
1.2 Install the Package

- ▶ 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**


 **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.

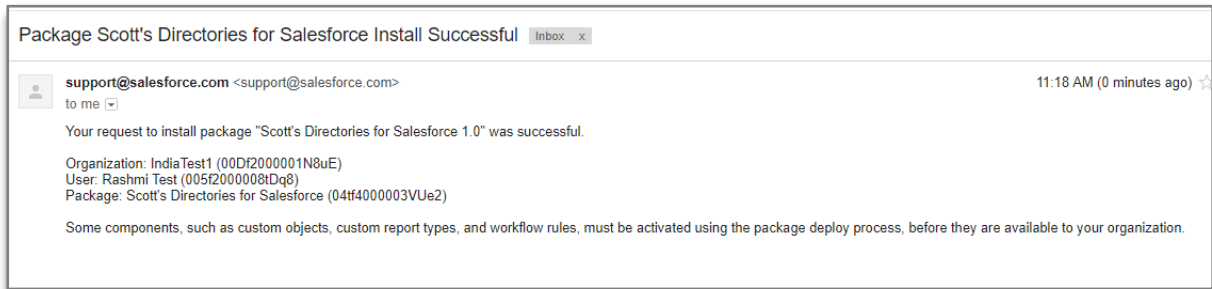
 **Install**

 **This app is taking a long time to install.**
You will receive an email after the installation has completed.

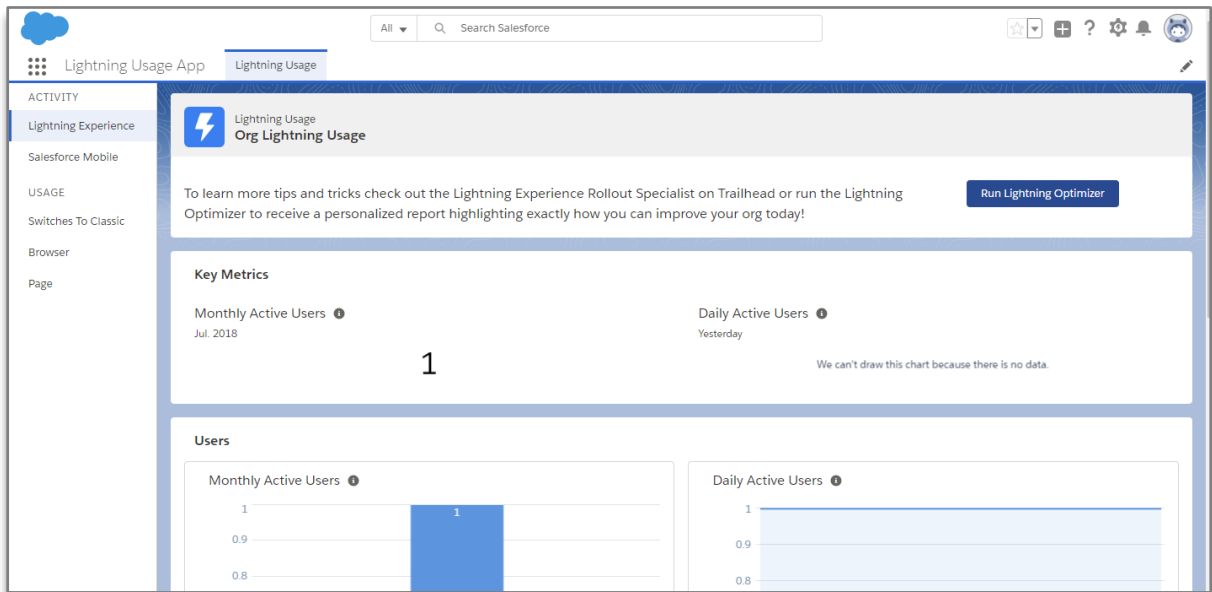
Done

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

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

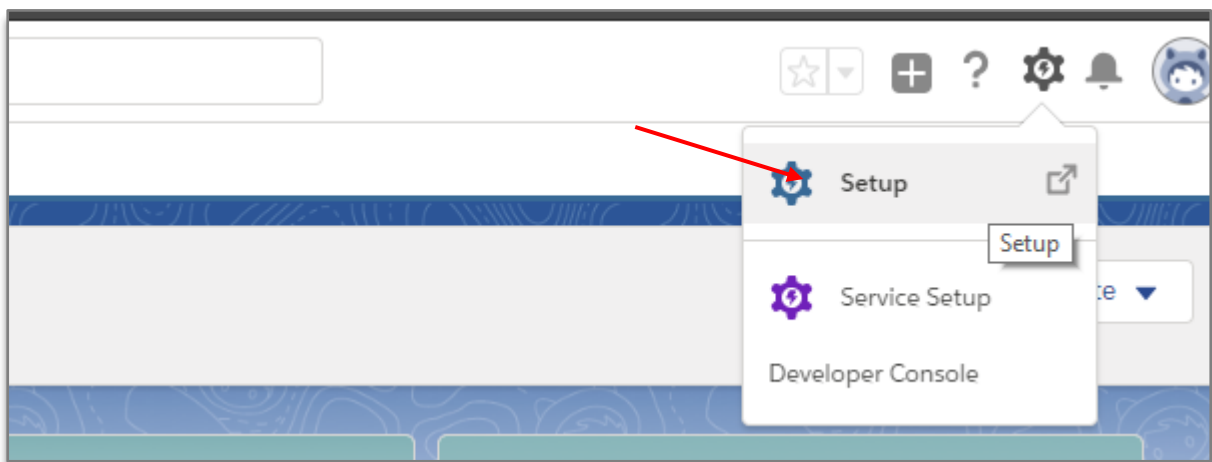


- ▶ This is what your screen will look like.



1.3 Setup

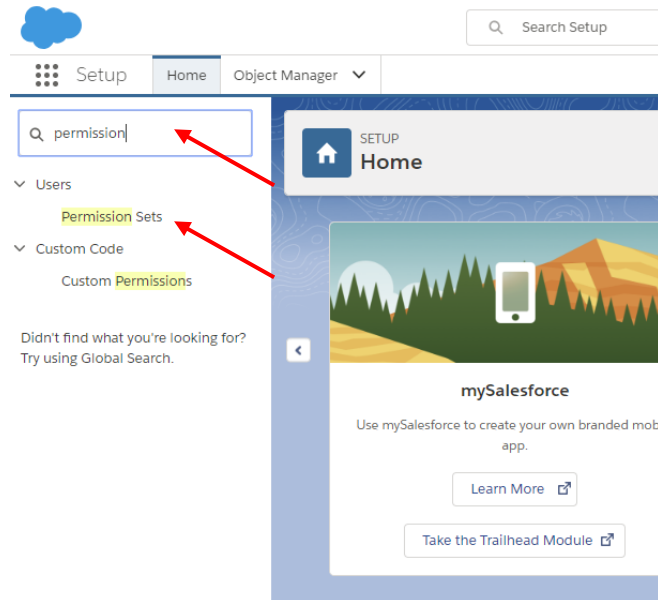
- ▶ Click **Setup** in the top right corner of Salesforce.



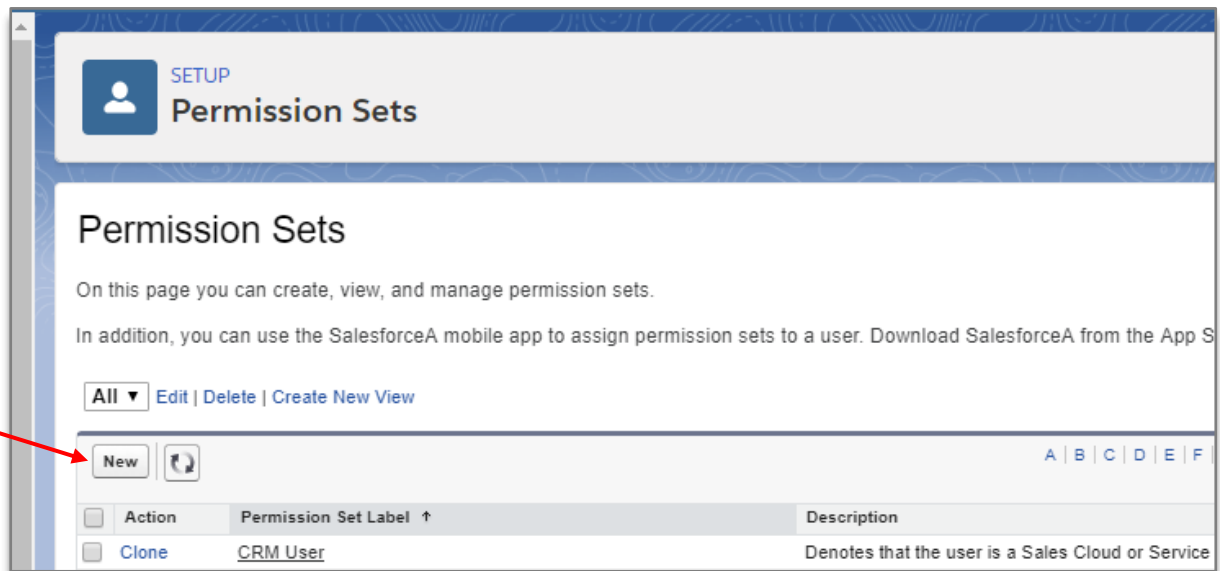
NOTE: From this point forward in the tutorial if you get lost or confused you can always get back to a clean slate by returning to **Setup**. All remaining tasks will be completed in the Admin section of Salesforce.

1.4 Create a Permission Set

- ▶ **Type** “permission sets” into the quick find / search box.
- ▶ **Click** on the **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.

SETUP
Permission Sets

Permission Set
Create

Save Cancel

Enter permission set information Required Information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "--None--" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Save Cancel

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

SETUP
Permission Sets

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 Sonika test 25/07/2018 2:45 AM	Last Modified By Sonika test 25/07/2018 2:45 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"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
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.

SETUP
Permission Sets

Permission Set
Scott's_Permissions [Video Tutorial](#) | [Help](#)

Q Scotts_ * | 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_Propecting	--	--	--
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.

SETUP
Permission Sets

Permission Set
Scotts_permissions [Video Tutorial](#) | [Help](#)

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	<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"/>
Company Name	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>
Created By	<input checked="" 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
Scotts_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"/>
Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country	<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.

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.

Permission Set
Scott's Permissions Video Tutorial | 1

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	--

1.5 Enable the Prospecting Tab

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

Permission Set
Scott's Permissions Video Tutorial | 1

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
Permission Sets

Permission Set
Scotts_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"/> ⓘ	<input checked="" type="checkbox"/> ⓘ

1.6 Assign the Permission Set

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

SETUP
Permission Sets

Permission Set
Scotts_permissions

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

Permission Set Overview > Object Settings ▼ Scotts Prospecting ▼

Scotts Prospecting Edit

Tab Settings

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

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

SETUP
Permission Sets

Permission Set
Scotts_permissions

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

Permission Set Overview

Description	API Name	Scotts_permissions	
License	Namespace Prefix		
Session Activation Required <input type="checkbox"/>			
Created By	Sonika test, 26/07/2018 9:46 AM	Last Modified By	Sonika test, 26/07/2018 10:17 AM

Apps

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

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

SETUP
Users

Assigned Users
Scotts_permissions

< Back to: Permission Set

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

Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
No records to display.							

Add Assignments Remove Assignments

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

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

SETUP
Users

Assign Users
All Users

View: All Users Edit Create New View

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

Assign Cancel

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00df2000001n8v4eac.ctitle040090@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Integration - CPQ	cpqusr	cpqintegration@00df2000001n8v4eac.ext			<input checked="" type="checkbox"/>	CPQ Integration User
<input checked="" type="checkbox"/> Edit	test_Sonika	stest	sonikas@owen-media.com	26/07/2018 7:52 AM		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Turkstra, David	DTurk	dturkstra+indiatest2@owen-media.com	24/07/2018 1:32 PM		<input checked="" type="checkbox"/>	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.

Installed Packages

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**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Obj
Uninstall Manage Licenses	Scott's Directories for Salesforce	Leadforce	1.0	scotts	Trial	1	1	01/08/2018	25/07/2018 1:52 AM		0	2	

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

Installed Packages

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**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange
Uninstall Manage Licenses	Scott's Directories for Salesforce	Leadforce	1.0	scotts	Trial	1	1	03/08/2018	27/07/2018 1:47 AM		0	2	6	Not Passed

- ▶ Click the **Add Users** button.

Package Details

Scott's Directories for Salesforce

[Back to Previous Page](#)

Package Name	Scott's Directories for Salesforce	Publisher	Leadforce
Status	Active	Allowed Licenses	4
Expiration Date	Does not Expire	Used Licenses	1

[Add Users](#) [Remove Multiple Users](#)

Action	Full Name	Role	Active	Profile
Remove	Meloche, Lori		✓	System Administrator

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

Available Users

[Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name	Role	Active	Profile
<input checked="" type="checkbox"/>	user, standard		✓	Standard User

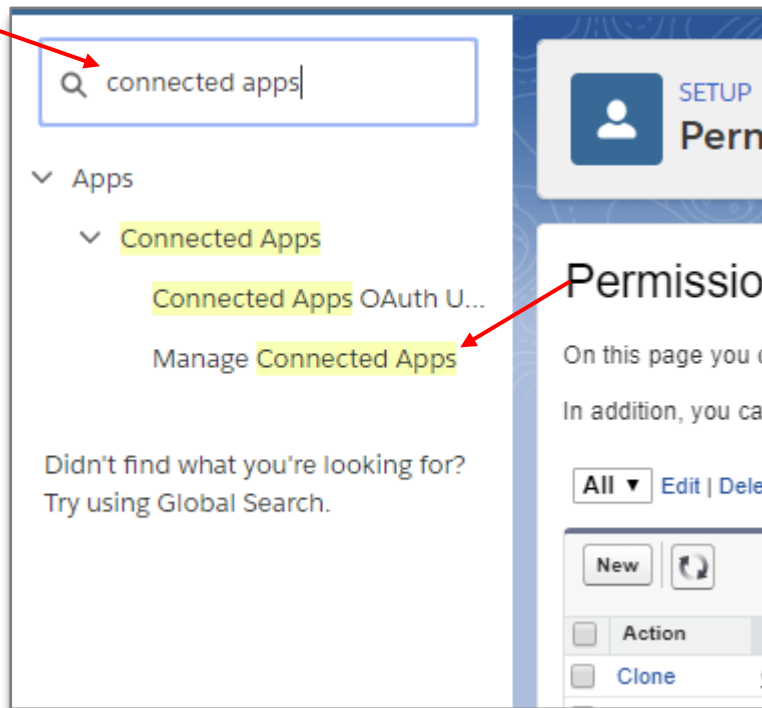
Selected Users

Action	Full Name
No rows selected	

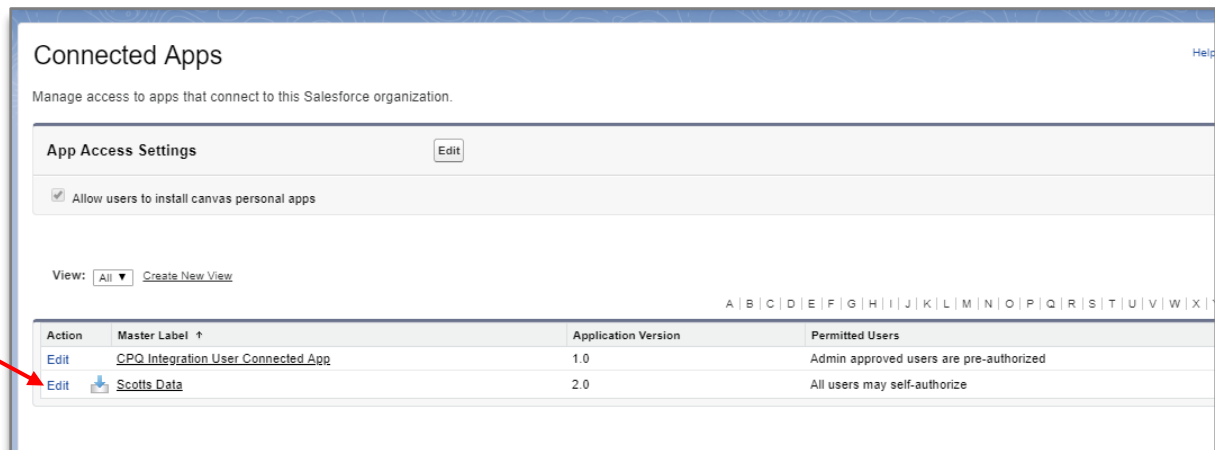
[Add](#) [Cancel](#)

1.8 Configure Connected App Permissions

- ▶ Search for “connected apps” (Do not press Enter).
- ▶ Click “Manage Connected Apps”



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



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

Connected App Edit

Version 2

Basic Information

Start URL Mobile Start URL

OAuth policies

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

Enable Single Logout **Admin approved users are pre-authorized**

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](#)

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 ↑	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.

SETUP

Session Policies

Timeout Value

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

☐ Enable User Provisioning [i](#)

Trusted IP Range for OAuth Web server flow

No application-defined IP ranges

Profiles [Manage Profiles](#)

No profiles associated with this app.

Permission Sets [Manage Permission Sets](#)

No permission sets associated with this app.

Custom Attributes [New](#)

No Custom Attributes

Custom Settings

Setting Label

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

Application Permission Set Assignment [Help for this Page](#)

[Back to Connected App Detail](#)

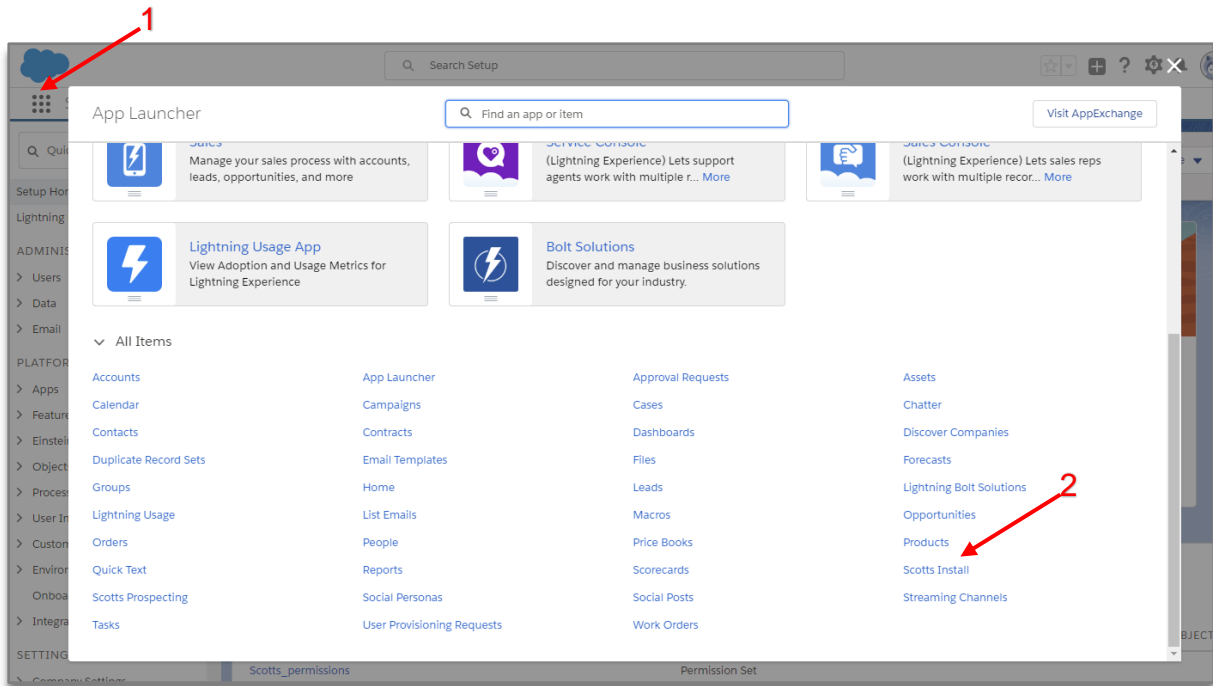
Select the appropriate permission sets to choose which users have access to this application.

Select	Permission Sets	Description
<input checked="" type="checkbox"/>	Scotts_permissions	

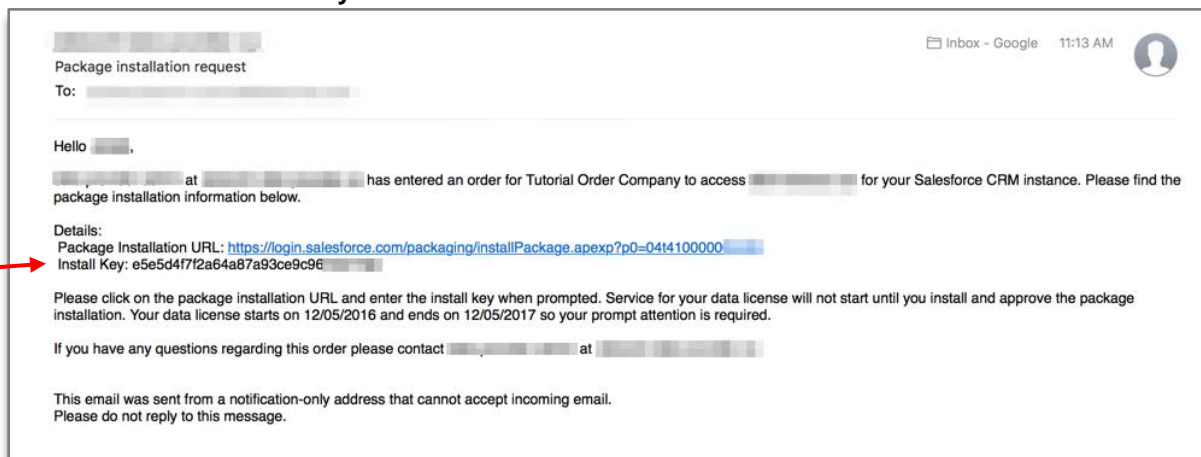
[Save](#) [Cancel](#)

1.9 Authenticate Installation Key

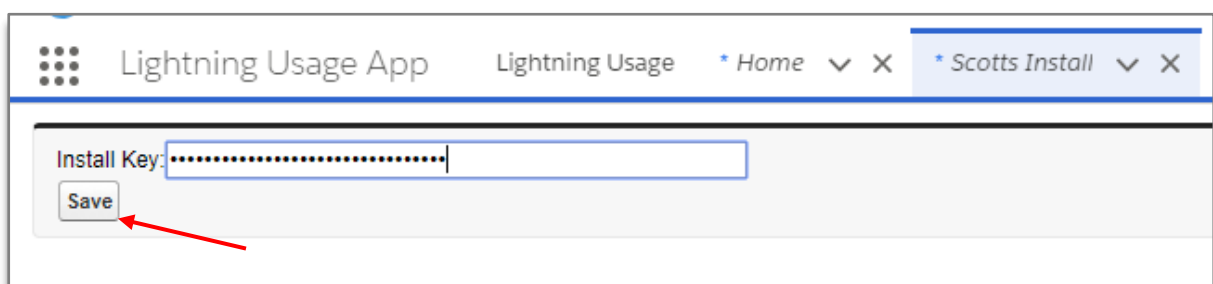
- ▶ Click the App Launcher icon on the top left of the menu bar.
Click the Data App link - **Scott's Install**



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



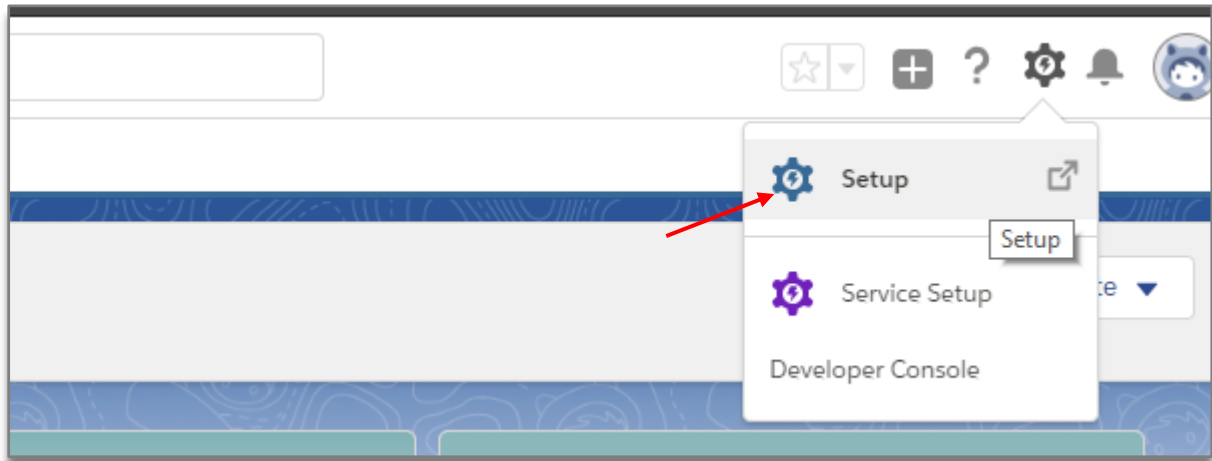
- ▶ Click the **Save** button.



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

Authentication successful

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



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

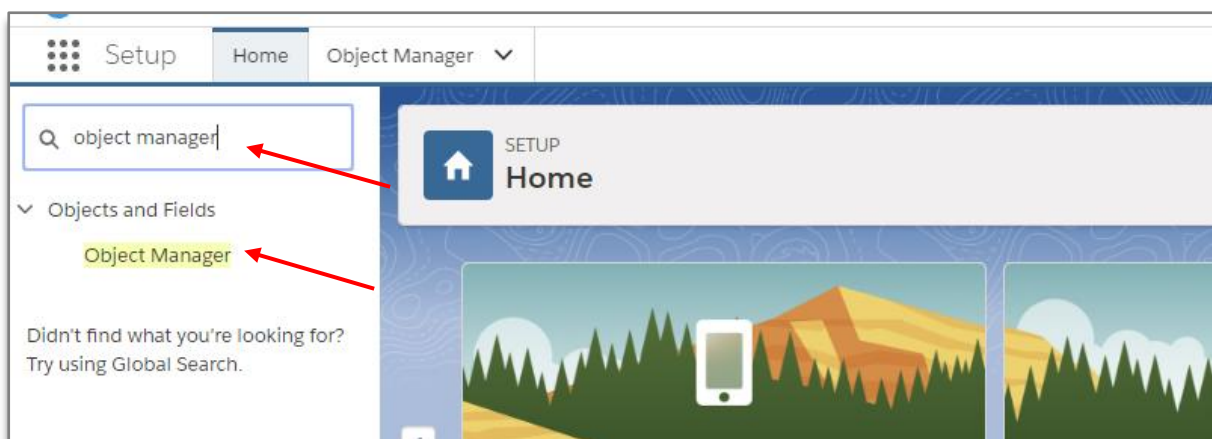
52.70.95.167

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.

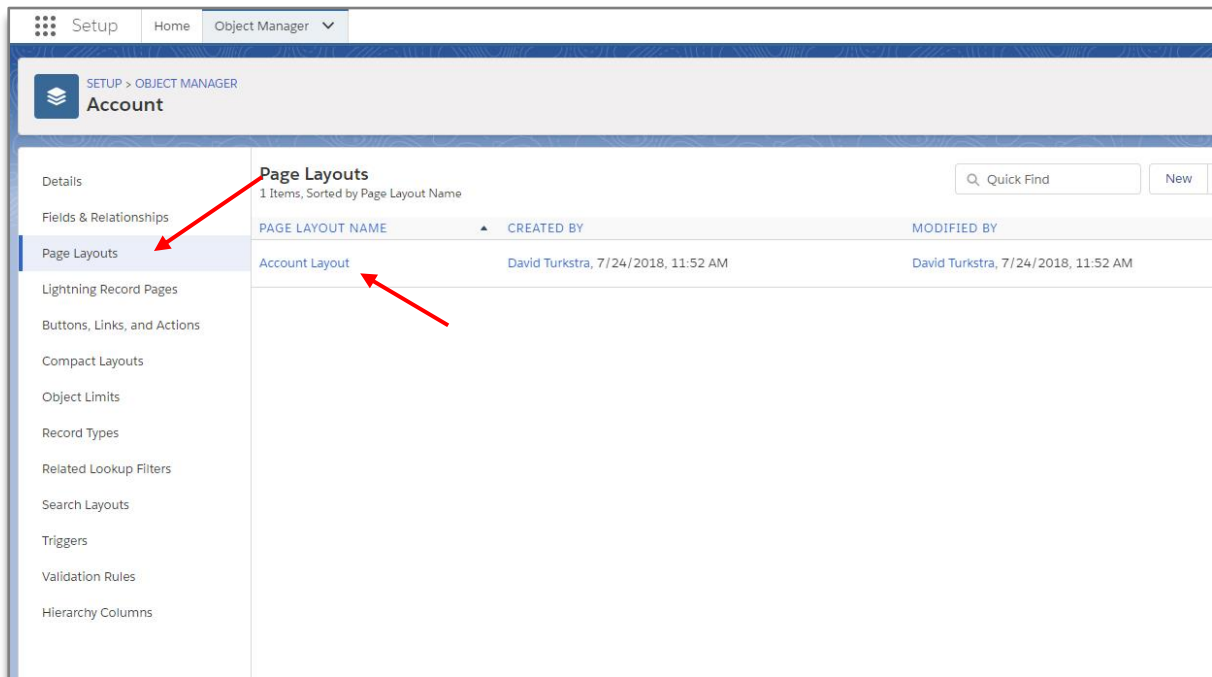
- ▶ Type “**object manager**” into the quick find / search box. (Do not press Enter).
- ▶ Click “**Object Manager**”



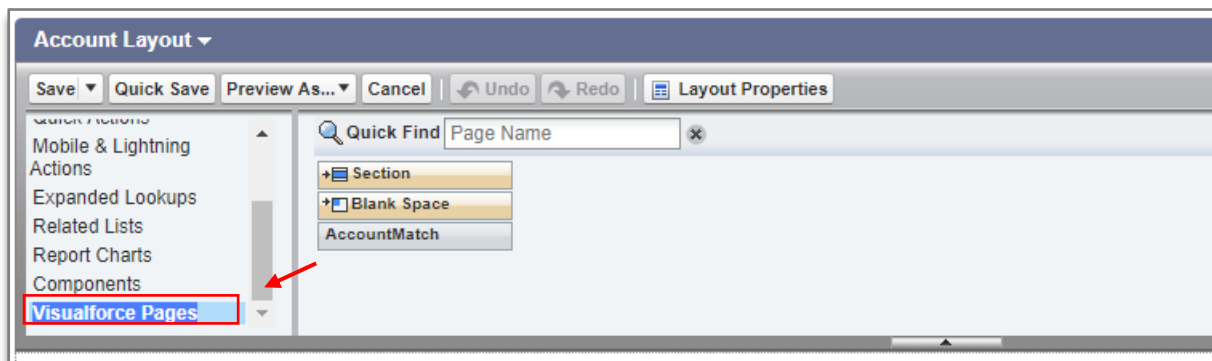
- Click on the “**Account**” link.

Setup	Home	Object Manager
 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	

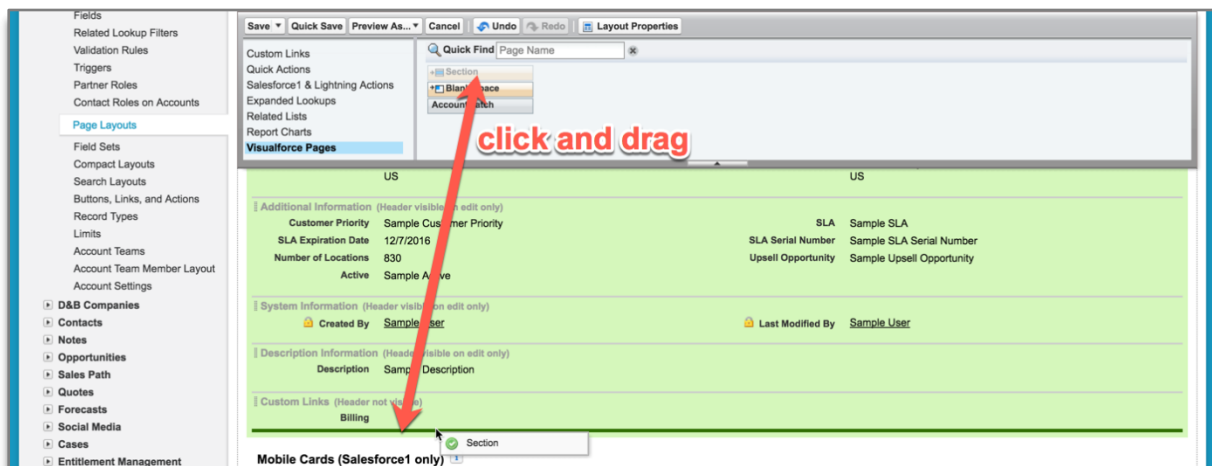
- ▶ Click **“Page Layouts”** in the menu.
- ▶ Click the **“Account Layout”** link.



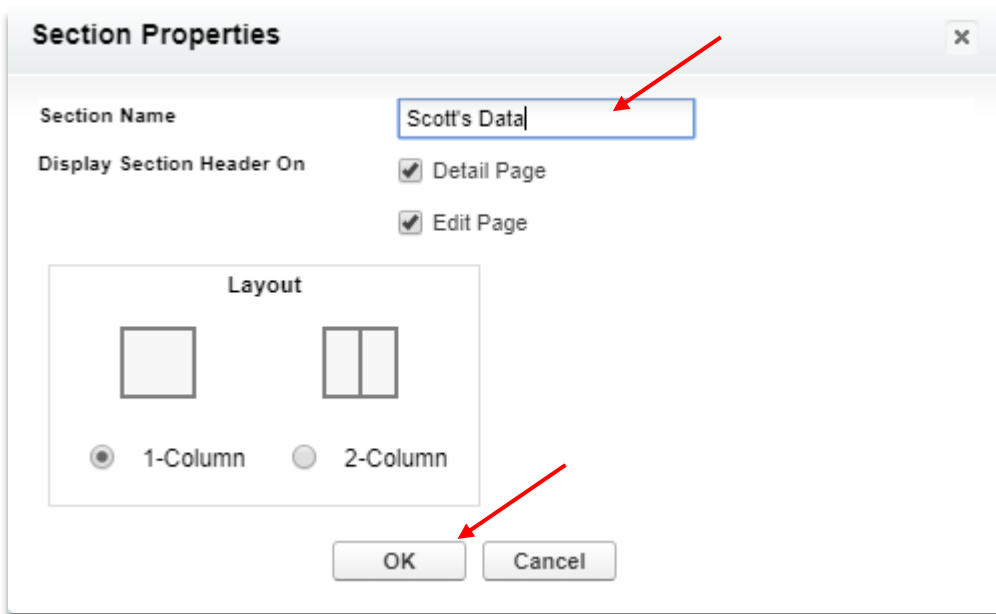
- ▶ On the top left selection scroll down and Click **“Visualforce Pages”**



- ▶ Create a new section by dragging **“Section”** from the top to the layout below, place it below **“Custom Links”** section.

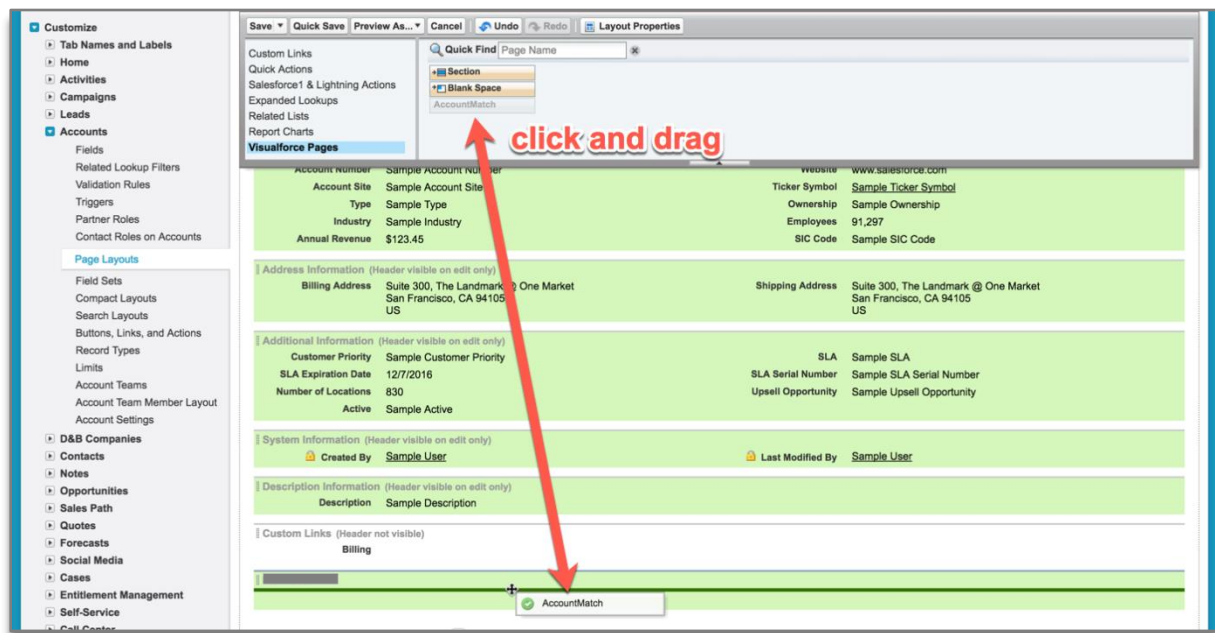


- ▶ Enter the **Name** for the section – **Scott's Data**
- ▶ Select **"1-Column"**
- ▶ Click the **OK** button.



The image shows the 'Section Properties' dialog box. The 'Section Name' field contains 'Scott's Data'. Under 'Display Section Header On', both 'Detail Page' and 'Edit Page' are checked. In the 'Layout' section, the '1-Column' radio button is selected. At the bottom, the 'OK' button is highlighted with a red arrow.

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



The image shows the Salesforce Visualforce Page editor. On the left is a sidebar with a navigation menu. The main area displays a Visualforce page with various sections. A red arrow points from the 'AccountMatch' component in the 'Visualforce Pages' palette to the bottom of the page layout, with the text 'click and drag' written in red.

Visualforce Pages

Account Number	Sample Account Number	Website	www.salesforce.com
Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	91,297
Annual Revenue	\$123.45	SIC Code	Sample SIC Code

Address Information (Header visible on edit only)

Billing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Shipping Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
-----------------	---	------------------	---

Additional Information (Header visible on edit only)

Customer Priority	Sample Customer Priority	SLA	Sample SLA
SLA Expiration Date	12/7/2016	SLA Serial Number	Sample SLA Serial Number
Number of Locations	830	Upsell Opportunity	Sample Upsell Opportunity
Active	Sample Active		

System Information (Header visible on edit only)

Created By	Sample User	Last Modified By	Sample User
------------	-------------	------------------	-------------

Description Information (Header visible on edit only)

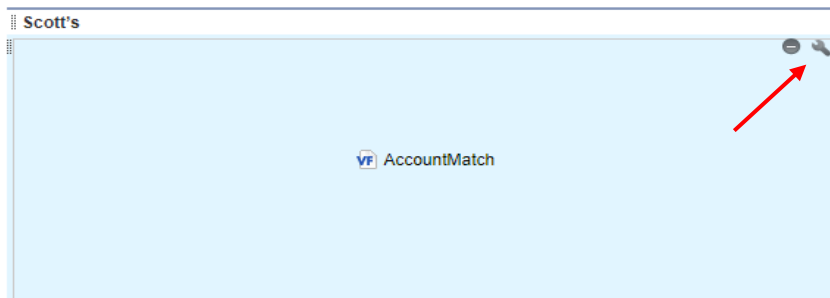
Description	Sample Description
-------------	--------------------

Custom Links (Header not visible)

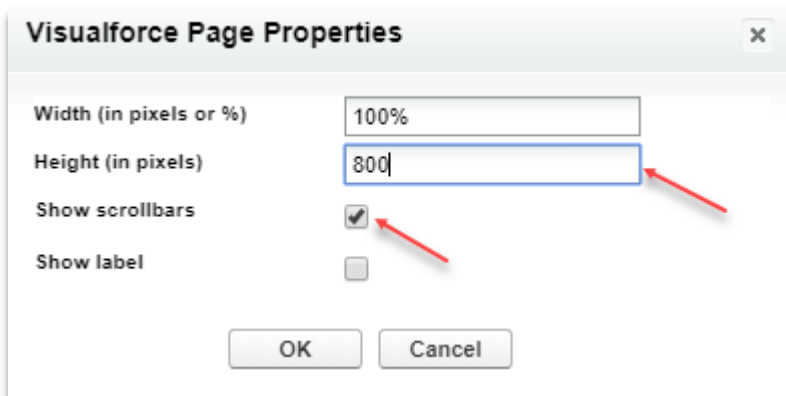
Billing

AccountMatch

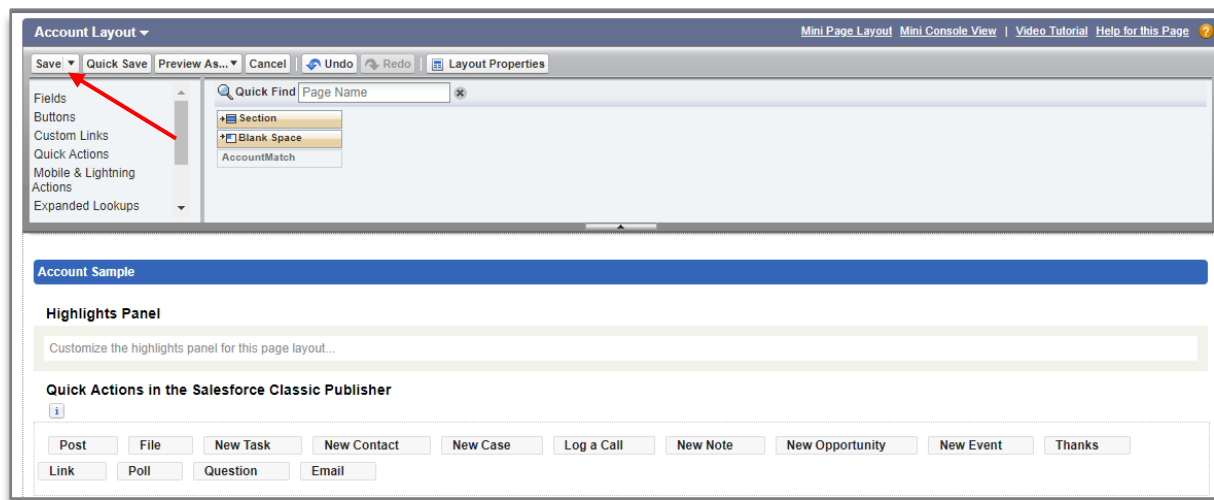
- Move the mouse to the top right of the “**AccountMatch**” page area. A wrench icon (properties) should appear.
- **Click** the wrench.



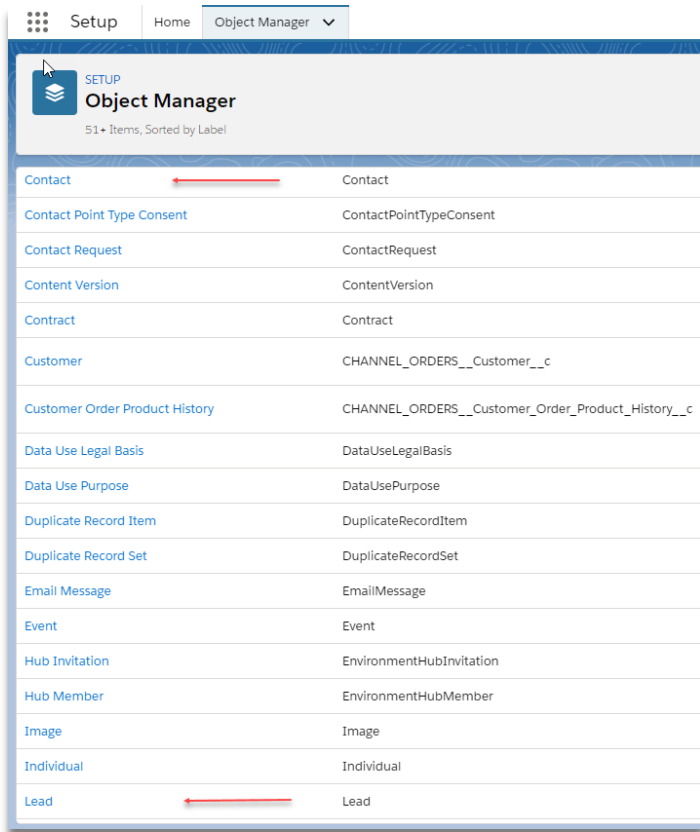
- Change the **Height** to at least **400**. We recommend **800** so there is no scrolling.
- **Check** “Show Scrollbars”
- **Click** the **OK** button.



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



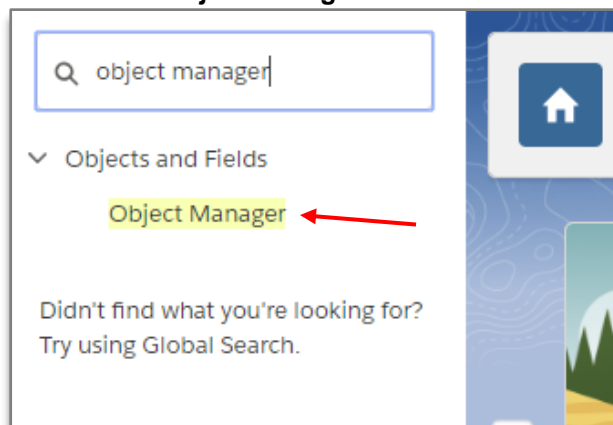
NOTE: Repeat the previous steps in 1.10 for other Salesforce Objects that are being modified, most likely **Contacts** and **Leads**.



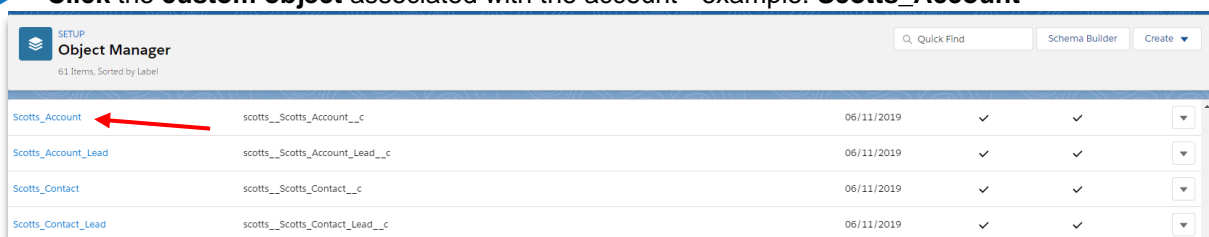
1.11 Configure Custom Object Layouts (optional)

****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 on **"Object Manager"**.

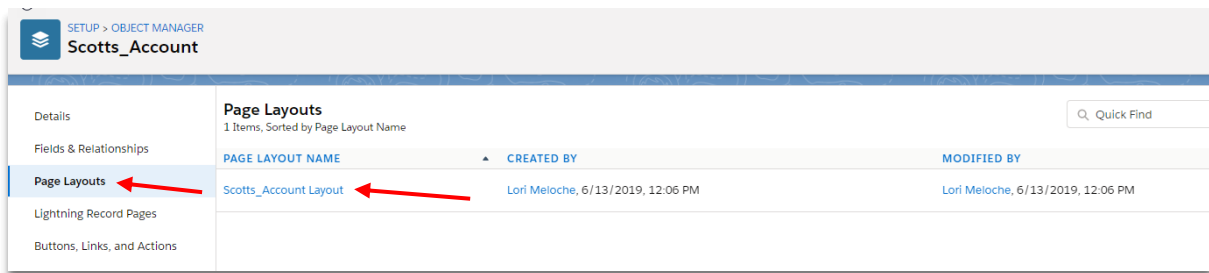


- ▶ Click the **custom object** associated with the account - example: **Scotts_Account**



- ▶ Click **Page Layouts** in the menu.

- ▶ Click the custom object Layout link - example: **Scotts_Account Layout**



- ▶ 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.

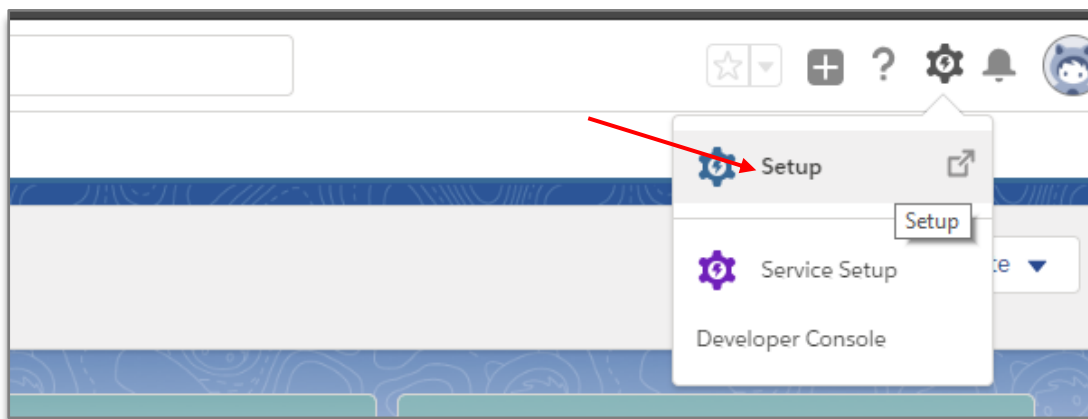
Installations have a configuration option where new records can be created (1) always using the credentials of the user who installed the package, regardless of which user is adding the new records or (2) using the credentials of the salesforce user who is adding the new records. Please ask your sales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

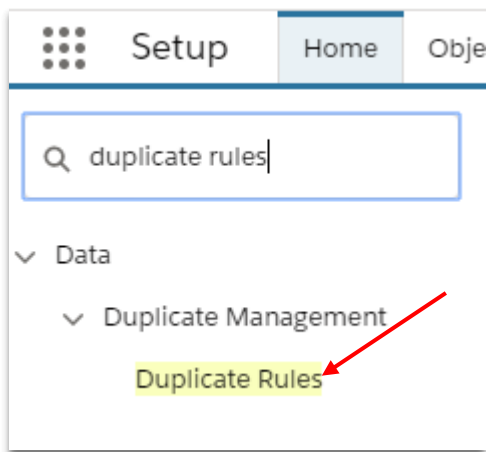
If the order is configured to use the credentials of the user who is adding the new records, duplicate detection should be disabled for all users who have access to add new records through the package.

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

- ▶ 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

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

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

- ▶ 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](#)

Order 1 of 1 [Reorder](#) [1](#)

Rule Name	Standard Account duplicate rule		
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

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**

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	✓	D Turk	08/08/2018
Standard Contact duplicate rule	Duplicate Rule for Contact records.	Contact	Standard Contact Matching Rule	✓	D Turk	08/08/2018
Standard Lead duplicate rule	Duplicate Rule for Lead records.	Lead	Standard Lead Matching Rule	✓	D Turk	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

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: ☒ Alert ☒ Report

Action On Edit: Allow Operations On Edit: ☐ Alert ☒ Report

Alert Text: Duplicate Alert

Active: ☒

Matching Rule: ☒ Standard Account Matching Rule ☒ Mapped Matching Criteria: Matching rule for account records. [More info](#)

Conditions: [Add Filter Logic...](#)

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							
What Are Duplicate Rules? [Expand]							
View: All Duplicate Rules							
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							
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	08/08/2018	
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	08/08/2018	

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:

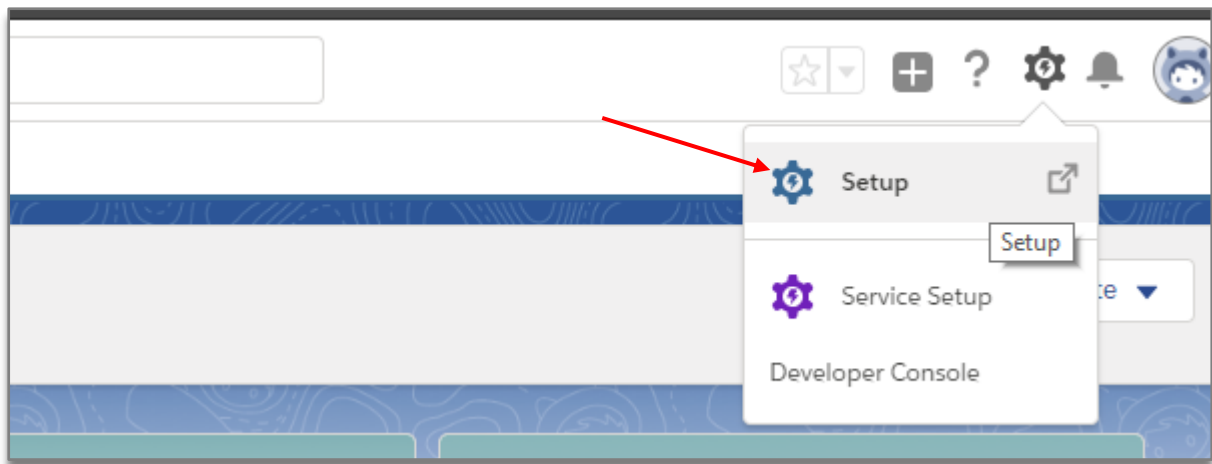
- Obtain system administrator access to the Salesforce org
- Decide on a custom source picklist value. It is recommended to use the package name. This will be referred to as picklist value in the Process Builder instructions.
- Identify the Salesforce package's namespace. (Setup > Installed Packages > 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.

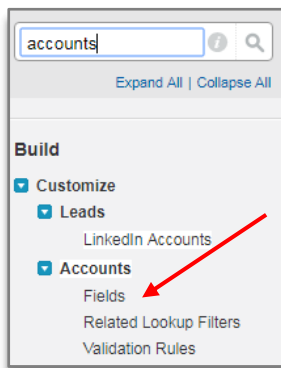
1.13.1 Add the New Account/Lead Source picklist value (optional)

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



► 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.

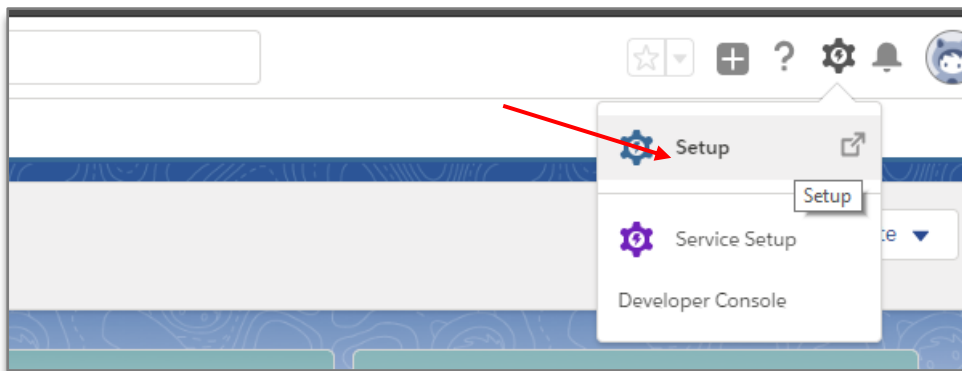
Scott's Data

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

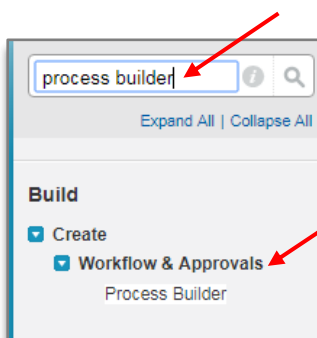
1.13.2 Process Builder (optional)

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

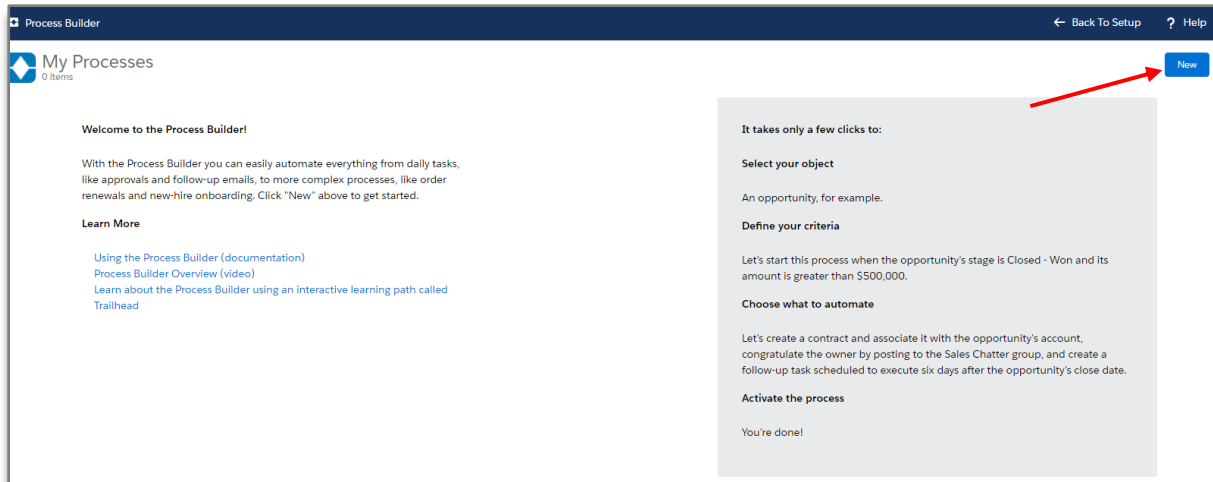
- ▶ Click Setup



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

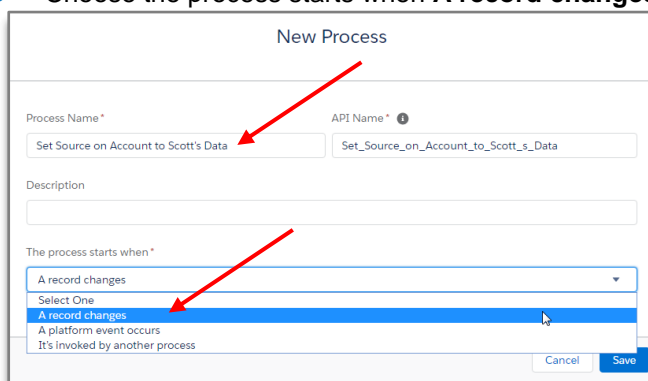


- ▶ Click **New** button



► 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**



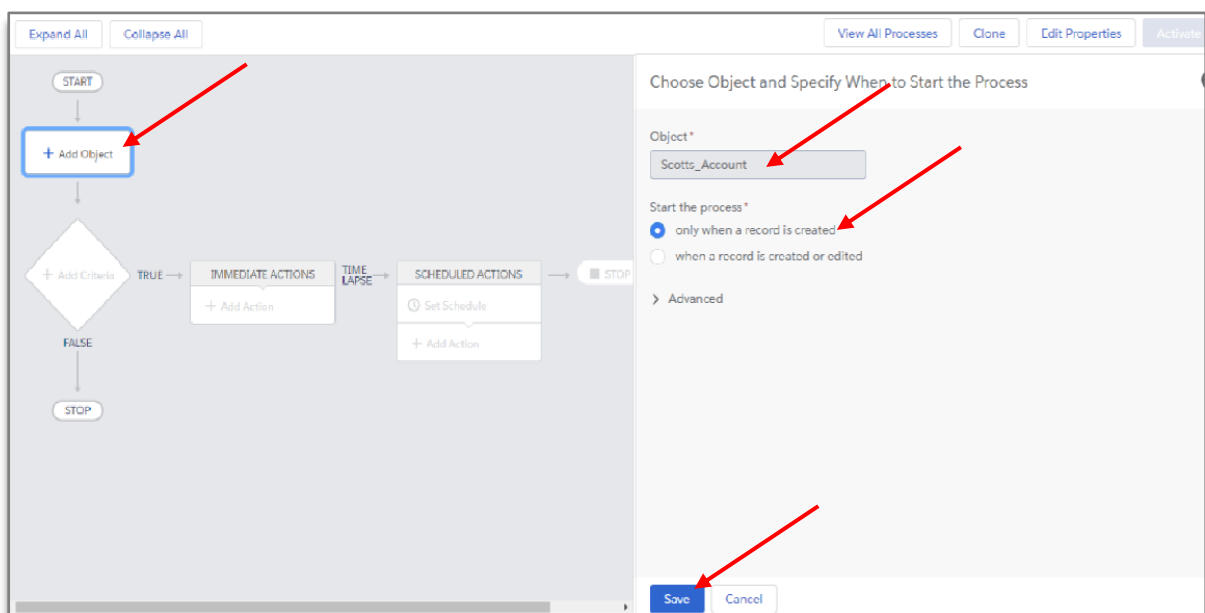
► Click **Add Object**

► 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* 1

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__scotts__c:scotts__source__c]	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

STOP

+ 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

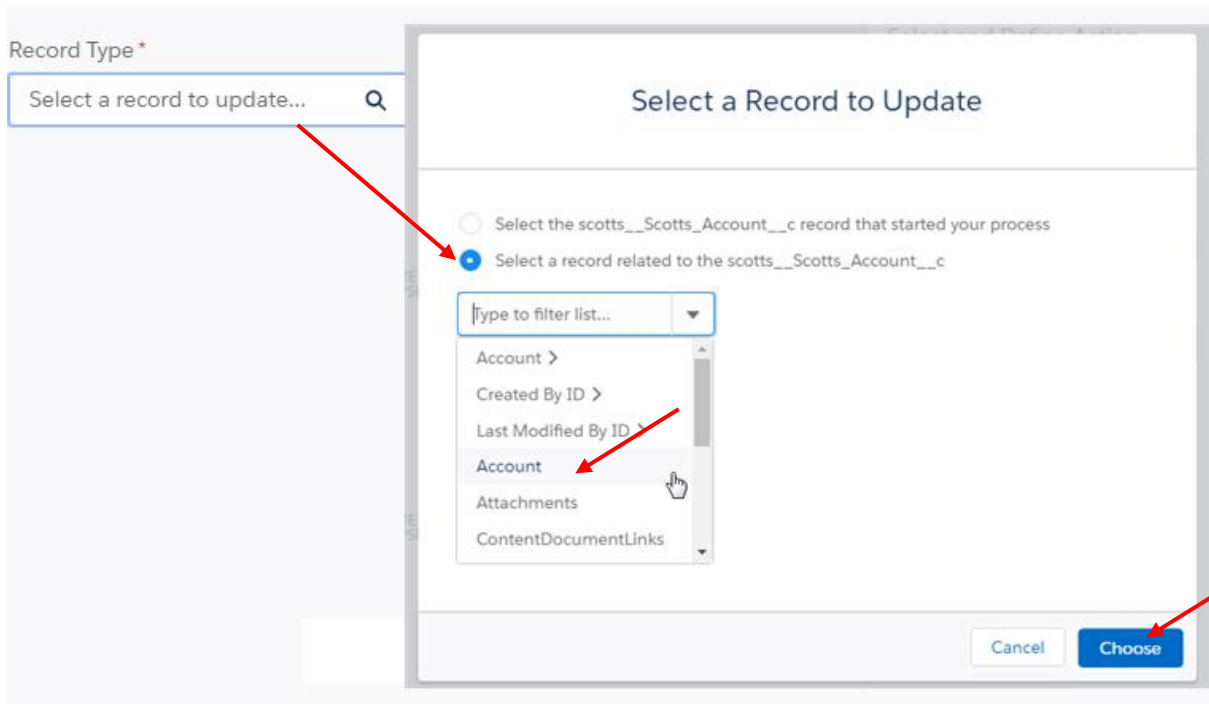
Record Type*

Select a record to update...

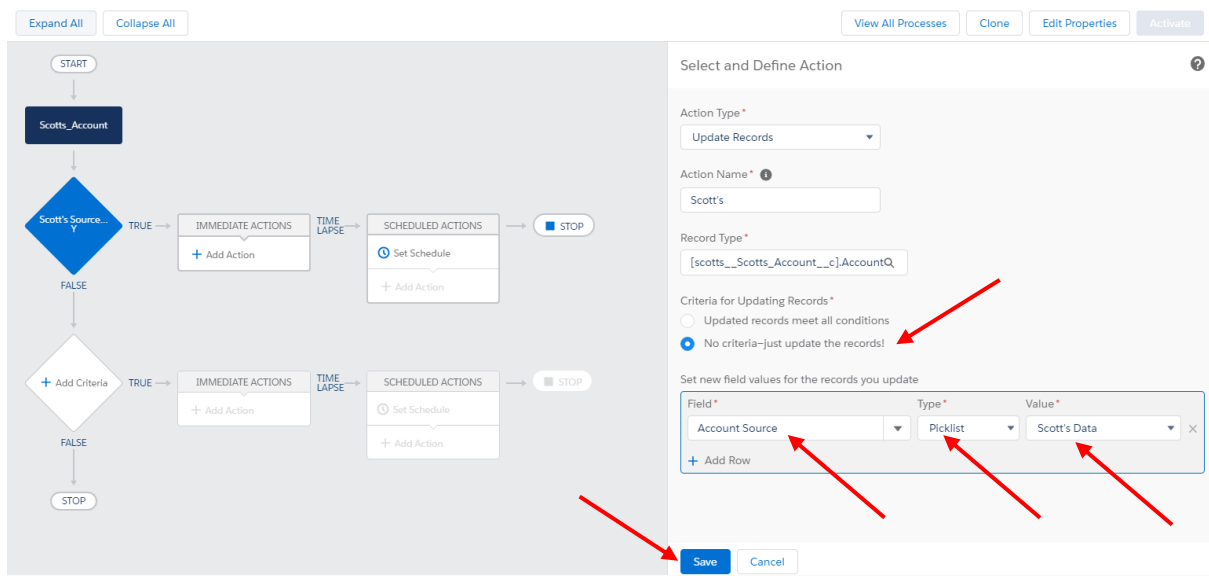
Save Cancel

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

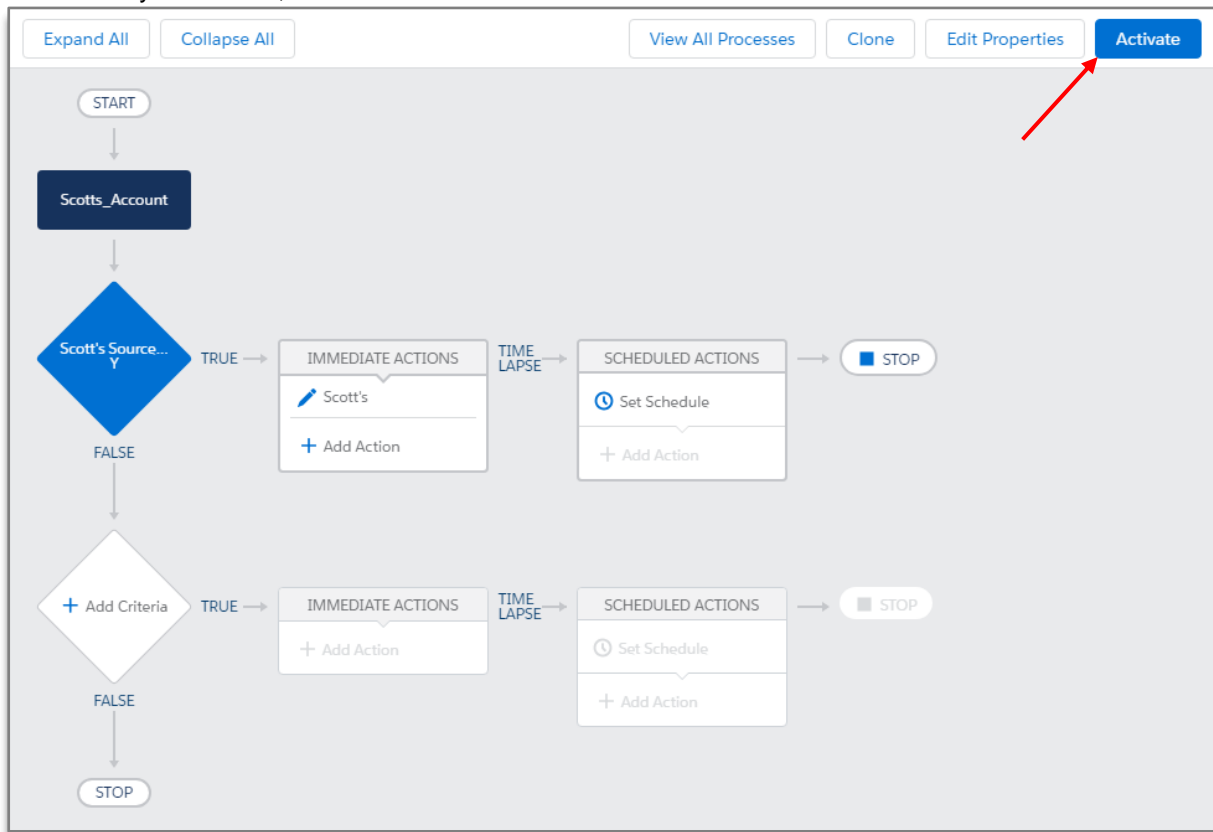
- ▶ Choose **Account** | **Contact** | **Lead** depending on process being built. **Do not choose Account > | Contact > | Lead >**
- ▶ Click **Choose**
- ▶ Record Type: **Select a record related to the (Custom Object)**
- ▶ Choose **Account** | **Contact** | **Lead** depending on process being built.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



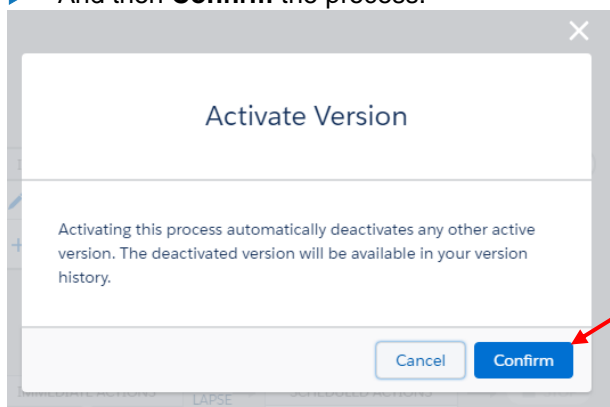
- ▶ Criteria for Updating Records: **No Criteria - just update the records!**
- ▶ Field: For Accounts, choose **Account Source**. For Contacts or Leads, choose **Lead Source**
- ▶ Type: **Picklist**
- ▶ Value: Choose the picklist value created (i.e. Scott's Data)
- ▶ Click **Save**



- 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

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](#)