

NIPR Integration - Initial Setup Guide

Version: 1.0

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Package Name: NIPR Integration

Package Namespace: `niprsync`

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Prerequisites

Before beginning the installation, ensure you have:

- ✓ System Administrator access to the target Salesforce org
- ✓ NIPR API credentials (username and password)
- ✓ Postman collection from the NIPR repository (for credential testing)
- ✓ Client approval for Production environment configuration

Step 1: Install NIPR Package

1.1 Get Latest Package Version from Hipten

To get the latest package version, contact your Hipten representative or run the following command from the Hipten Dev Hub:

```
# Authenticate to Hipten Dev Hub
sf org login web --alias "HIPTEN DEV HUB" --set-default-dev-hub

# List all released package versions
sf package version list --packages "NIPR Integration" --target-dev-hub "HIPTEN DEV HUB"
```

Package Version: 0.7.0-1

1.2 Install Package in Client Org

Install the package in the client's Salesforce org:

```
# Authenticate to client org
sf org login web --alias "Client Org Name"

# Install the package
sf package install \
  --package "04tPB000000At1dYAC" \
  --target-org "Client Org Name" \
  --wait 20 \
  --upgrade-type Mixed
```

1.3 Alternative: Install via Salesforce UI

1. Log into the client org as System Administrator
2. Navigate to the package installation URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tPB000000At1dYAC>

5. Wait for installation to complete (you'll receive an email notification)

Step 2: Assign Permission Set Groups

After package installation, assign the appropriate Permission Set Groups to users.

2.1 For Standard Users (Read-Only Access)

- View NIPR data (Producers, Licenses, Appointments, etc.)
 - API callout permissions for NIPR integration
5. Select all standard users who need read-only access to NIPR data

2.2 For Admin Users (Full Access)

- Full administrative access to NIPR objects
 - SSN field visibility
 - Manage Producer records
 - API callout permissions
 - Admin-level access to all NIPR features
5. Select all admin users who need full NIPR access

Step 3: Configure Page Layouts

CRITICAL: The NIPR package adds custom fields to standard objects (Account, Contact, Lead) but cannot modify your org's page layouts. You must manually add NIPR fields to your page layouts for users to see and edit them.

3.1 Account Page Layout Configuration

Add the following NIPR fields to your Account page layouts:

3. Select the page layout(s) used by your users (e.g., "Account Layout")
6. Drag and drop the NIPR fields listed above into the section
8. Repeat for all Account page layouts in use

3.2 Contact Page Layout Configuration

Add the following NIPR fields to your Contact page layouts:

3. Select the page layout(s) used by your users
6. Drag and drop the NIPR fields listed above into the section
8. Repeat for all Contact page layouts in use

3.3 Lead Page Layout Configuration

Add the following NIPR fields to your Lead page layouts:

3. Select the page layout(s) used by your users
6. Drag and drop the NIPR fields listed above into the section
8. Repeat for all Lead page layouts in use

3.4 Field-Level Security

If users cannot see or edit NIPR fields after adding them to layouts, verify:

1. ■ Permission Set Groups are assigned (Step 2)
2. ■ User's Profile grants Create/Edit access to Account, Contact, Lead objects
3. ■ NIPR fields are added to the correct page layouts (steps 3.1-3.3)
4. ■ User is assigned the correct page layout via their Profile or Record Type

Step 4: Configure Custom Metadata - Subscription Email

Configure the email address where PDB Alert notifications should be sent.

3.1 Navigate to Custom Metadata Type

3.2 Create or Edit Email Record

If a record already exists:

If no record exists:

Step 4: Share NIPR Reports Folder

4.1 Navigate to Reports

3. Click the dropdown arrow next to the folder name

4.2 Share with Users or Roles

2. Select the users, roles, or public groups that should have access
3. Choose the access level:

Step 5: Configure Named Credentials

Configure the Named Credentials to connect to NIPR's APIs.

5.1 Test Credentials with Postman (CRITICAL STEP)

■■ WARNING: This step is billable by NIPR. Only test the PDB Alerts API endpoint.

Before configuring Named Credentials in Salesforce, test the credentials using the Postman collection found in the NIPR repository:

1. Open the Postman collection from the NIPR repository
2. Configure the NIPR credentials (username and password)
4. Expected response: Error indicating no subscriptions (confirms credentials are valid)

5.2 UAT Environment Configuration

5.2.1 Configure External Credential

7. Enter the credentials:

5.2.2 Verify Named Credentials URLs (UAT)

- ✓ No changes needed for UAT
- ✓ No changes needed for UAT

5.3 Production Environment Configuration

■ **CRITICAL WARNING: Production environment configuration should only be done:**

- ✓ After successful UAT testing
- ✓ With explicit client approval
- ✓ With production credentials from the client
- ✓ After testing credentials via Postman

5.3.1 Configure External Credential (Production)

5.3.2 Update Named Credential URLs (Production)

■■ **CRITICAL: Remove .beta from both Named Credential URLs.**

Step 6: Test NIPR Integration

Test the NIPR integration by manually creating a Producer record.

6.1 Create Test Producer Record

4. Fill in the following fields:

6.2 Verify Integration Attempt

After saving, the integration will attempt to retrieve data from NIPR. Since this is a test NPN, the integration should fail (which confirms the integration is working).

3. You should see a log entry indicating the NIPR API was called
4. The log should show an error (expected for a test NPN)

- Log Level: ERROR or WARNING

If you see log entries, the integration is working correctly.

Step 7: Schedule Automated Jobs

Schedule the automated jobs for PDB Alerts and log cleanup.

7.1 Schedule PDB Alerts Daily Report

This job retrieves daily PDB alerts from NIPR and updates Producer records.

5. Paste the following code:

```
Id jobId = niprsync.PDBAlertReportScheduleable.scheduleDaily();  
System.debug('Scheduled Job ID: ' + jobId);
```

7. Check the debug log to verify the job was scheduled

7.2 Schedule Log Deletion Job

This job automatically deletes old Logger records to keep the org clean.

3. Paste the following code:

```
Id jobId = niprsync.DeleteLogsScheduleable.scheduleTwiceMonthly();  
System.debug('Scheduled Job ID: ' + jobId);
```

5. Check the debug log to verify the job was scheduled

7.3 Verify Scheduled Jobs

2. Confirm both jobs appear in the list:

Troubleshooting

Issue: Package Installation Fails

- Ensure you have System Administrator access
- Check that the org has sufficient storage space
- Verify the package version ID is correct

Issue: Named Credential Authentication Fails

1. Verify credentials in LastPass (UAT) or from client (Production)
2. Test credentials using Postman before configuring in Salesforce
3. Ensure the correct environment URLs are configured (beta vs production)
4. Check that the External Credential Principal is configured correctly

Issue: Users Cannot See NIPR Data

1. Verify the user has been assigned the appropriate Permission Set Group
2. Check that the Permission Set Group is Active
3. Ensure the user's profile has access to the NIPR tabs
4. Log out and log back in to refresh permissions

Issue: PDB Alerts Not Received

4. Verify NIPR subscriptions exist and are active

Issue: Logs Not Being Deleted

2. Check the job is not in a failed state
4. Manually run the job from Developer Console to test:

```
Database.executeBatch(new niprsync.DeleteLogsBatchable(), 2000);
```

Support

For technical support or questions:

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