

Salesforce.com Installation

This Guide covers the following topics:

- Installing the Salesforce.com application
- Configuring the application

For more detailed information on using Salesforce.com, click the **Help & Training** link at the top of every Salesforce.com page.

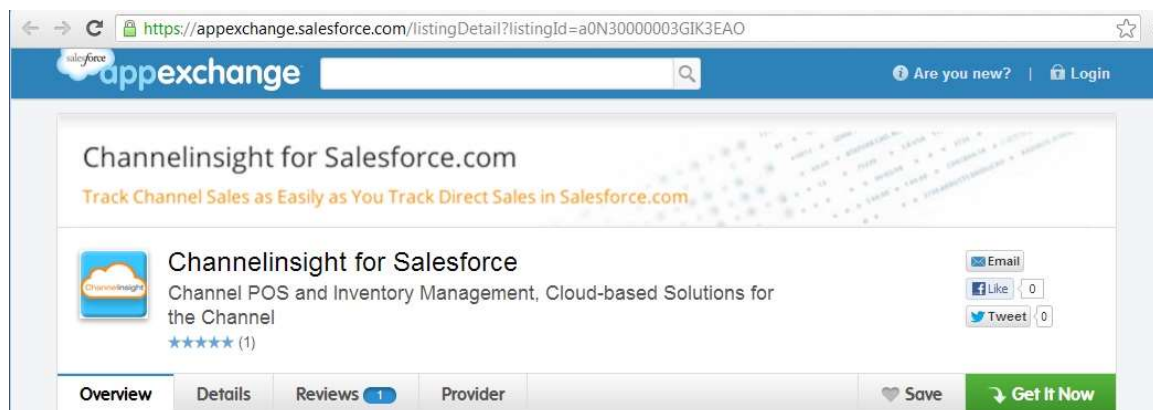
Some important things to remember:

- A System Administrator profile for Channelinsight is required during implementation.
- The password for the profile used by the Channelinsight interface must be set so that is never expires. This profile should have the API enabled permission, and permissions to the Channelinsight package objects, as well as account, opportunities, products, and pricebooks.
- After you install the Channelinsight package for Salesforce.com, some additional configuration is required to populate the Channelinsight package with your data.

Note: You must have System Administrator privileges to install the software.

Installing the Application

1. To install Salesforce.com via a Web-based interface, navigate to this URL:
<http://sites.force.com/appexchange/listingDetail?listingId=a0N30000003GIK3EAO>
2. When the Channelinsight for Salesforce.com screen opens, click **Get it Now**.



A similar screen opens asking How would you like to continue? There are two options, Install in production or Install in sandbox. For this install example, Install in production is the choice.

3. Click **Install in production**.
A similar screen opens with the download details.
4. Verify all the information is correct and select the box next to I have read and agree...
5. Click **Confirm and Install!**

The login screen opens.

6. Enter your User Name and Password.

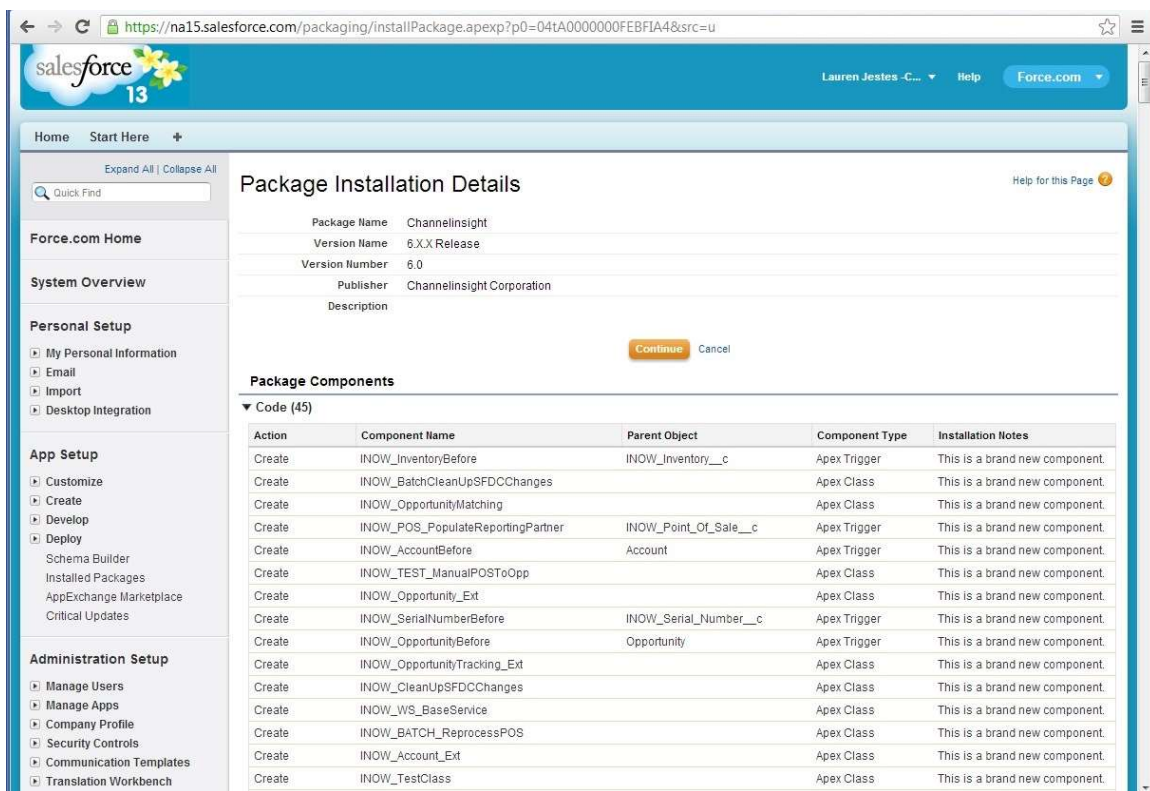
7. Click **Login**.

Note: First time users may need to change their passwords. Complete the necessary information and click **Save**.

You may be asked to login more than once.

1. When the Package Installation Details screen opens, click **Continue**.

Note: An Approve Third-Party Access screen may open, select **Yes, grant access...** and click **Continue**.



The screenshot shows the Salesforce Package Installation Details screen. The package name is 'Channelinsight', version is '6.X.X Release', and the publisher is 'Channelinsight Corporation'. Below this, there is a 'Continue' button. The 'Package Components' section lists 45 components, including various Apex Triggers and Classes, all marked as 'brand new components'.

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	INOW_InventoryBefore	INOW_Inventory__c	Apex Trigger	This is a brand new component.
Create	INOW_BatchCleanUpSFDCCChanges		Apex Class	This is a brand new component.
Create	INOW_OpportunityMatching		Apex Class	This is a brand new component.
Create	INOW_POS_PopulateReportingPartner	INOW_Point_Of_Sale__c	Apex Trigger	This is a brand new component.
Create	INOW_AccountBefore	Account	Apex Trigger	This is a brand new component.
Create	INOW_TEST_ManualPOSToOpp		Apex Class	This is a brand new component.
Create	INOW_Opportunity_Ext		Apex Class	This is a brand new component.
Create	INOW_SerialNumberBefore	INOW_Serial_Number__c	Apex Trigger	This is a brand new component.
Create	INOW_OpportunityBefore	Opportunity	Apex Trigger	This is a brand new component.
Create	INOW_OpportunityTracking_Ext		Apex Class	This is a brand new component.
Create	INOW_CleanUpSFDCCChanges		Apex Class	This is a brand new component.
Create	INOW_WS_BaseService		Apex Class	This is a brand new component.
Create	INOW_BATCH_ReprocessPOS		Apex Class	This is a brand new component.
Create	INOW_Account_Ext		Apex Class	This is a brand new component.
Create	INOW_TestClass		Apex Class	This is a brand new component.

8. When the Step 1. Approve Package API Access screen opens, click **Next**.

The Step 2. Choose security level screen opens. You can define security levels for user profiles.

9. Select **Select security settings**.

10. Under the Customize security section, set the Access Level for each profile by selecting an action from the dropdown list.

Note: If you enable any profiles, custom objects, or tabs without using Channelinsight's profile templates, remember to set the security level.

11. Select one of the Channelinsight profiles if you would like to have Channelinsight visible along with other tabs that are part of the application.

12. Click **Next**.

The screenshot shows the 'Step 2. Choose security level' screen in the Salesforce Package Installer. The left sidebar contains navigation links for 'Force.com Home', 'System Overview', 'Personal Setup', 'App Setup', and 'Administration Setup'. The main content area is titled 'Step 2. Choose security level' and includes a 'Select security settings' section with three radio buttons: 'Grant access to admins only', 'Grant access to all users', and 'Select security settings' (which is selected). Below this is a 'Customize security' section with a warning message about standard profiles. The main part of the screen is a table for setting access levels for various profiles.

Action	Access Level	Description
Set All	No Access	No access to any features in this package.
Set All	Full Access	Full access to all features and fields in this package
Set All	Channel Insight: Sales/Channel Operations (Data Steward)	
Set All	Channel Insight: Standard/Read Only	
Set All	Channel Insight: Interface	
Set All	Channel Insight: Sales Rep/Manager/Operations	

Below the table, there is a section titled 'Please select a level of access to the features in this package for each of your organization's custom profiles.' with a table for setting access levels for various profiles.

Profile	Access Level
System Administrator	Full Access (Your profile must have full access to the package)
Customer Portal Manager	No Access
Authenticated Website	No Access
High Volume Customer Portal	No Access
Service Cloud	No Access
Partner User	No Access
Standard Platform User	No Access

13. When the Step 3. Install Package screen opens, click **Install**.

A Processing screen opens. You receive an e-mail when the install completes.

Post Installation Tasks

Note: The final step of the package installation gives you an option to ignore Apex test failures. This refers to the various tests that our package performs when you install. It is suggested that you *do not* check the **ignore errors** box. However, on occasion, a test failure may occur. This is typically due to custom validation errors that are unique to a particular organization. In this case, it is acceptable to check the **ignore errors** box and proceed.

Configuring Channelinsight Profiles

After receiving the install e-mail, you can configure profile settings.

1. Click your login name at the top of the page to display a dropdown list.
2. Click **Setup** to edit settings.

Customizing User Profiles

You can modify existing customer custom profiles to allow access to Channelinsight (Read-only on POS and inventory fields).

3. In the left column, under Administration Setup, click **Manage Users > Profiles**. The Profiles screen opens.
4. Assign users to a Channelinsight profile or edit your custom profile.

The screenshot displays the Salesforce 'User Profiles' page. The left sidebar shows the navigation menu with 'Administration Setup' expanded and 'Profiles' selected. The main content area shows a table of user profiles. The table has four columns: 'Action', 'Name', 'User License', and 'Custom'. The 'Custom' column contains checkboxes indicating whether a profile is a custom profile. The table lists various standard and custom profiles, including 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Portal Manager', 'Customer Portal Manager Custom', 'Customer Portal Manager Standard', 'Force.com - App Subscription User', 'Force.com - Free User', 'Gold Partner User', 'High Volume Customer Portal', 'Marketing User', 'Partner App Subscription', 'Partner User', 'Read Only', 'Service Cloud', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'Standard User'.

Action	Name	User License	Custom
Edit	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit	Chatter External User	Chatter External	<input type="checkbox"/>
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Del	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit	Customer Portal Manager	Customer Portal Manager	<input type="checkbox"/>
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
Edit	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
Edit	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
Edit	Gold Partner User	Gold Partner	<input type="checkbox"/>
Edit	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
Edit	Marketing User	Salesforce	<input type="checkbox"/>
Edit	Partner App Subscription	Partner App Subscription	<input type="checkbox"/>
Edit	Partner User	Partner	<input type="checkbox"/>
Edit	Read Only	Salesforce	<input type="checkbox"/>
Edit	Service Cloud	Service Cloud	<input type="checkbox"/>
Edit	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit	Solution Manager	Salesforce	<input type="checkbox"/>
Edit	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit	Standard User	Salesforce	<input type="checkbox"/>

- Click the **Edit** link for the custom profile you want to edit.

The Profile Edit screen opens.

At the top of the screen, you can adjust the Custom Application settings. These settings determine which user profiles can view Channelinsight.

- Click **Visible** to display the selected application.

In the next section, you can adjust the Tab Settings. These settings determine which users can view each **Channelinsight** tab in Salesforce.com.

- Select the appropriate setting for each tab from the dropdown list.

Profile Edit
Standard User

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Cancel]

Name: Standard User
User License: Salesforce
Custom Profile: ☐

Custom App Settings ⓘ = Required Information

	Visible	Default		Visible	Default
Call Center	<input checked="" type="checkbox"/>	<input type="radio"/>	Marketing	<input checked="" type="checkbox"/>	<input type="radio"/>
Channel Insight	<input type="checkbox"/>	<input type="radio"/>	Sales	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Community	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console	<input type="checkbox"/>	<input type="radio"/>
Content	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com	<input checked="" type="checkbox"/>	<input type="radio"/>
Force.com	<input checked="" type="checkbox"/>	<input type="radio"/>			

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings	Customizable Forecasts
Home: Default On	Customizable Forecasts: Default On
Accounts: Default On	Ideas: Default On
Campaigns: Default On	Leads: Default On
Cases: Default On	Libraries: Default On
Console: Tab Hidden	Opportunities: Default On
Contacts: Default On	Portals: Tab Hidden
Content: Default On	Products: Default On
Contracts: Default On	Reports: Default On
Dashboards: Default On	Site.com: Default On