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:

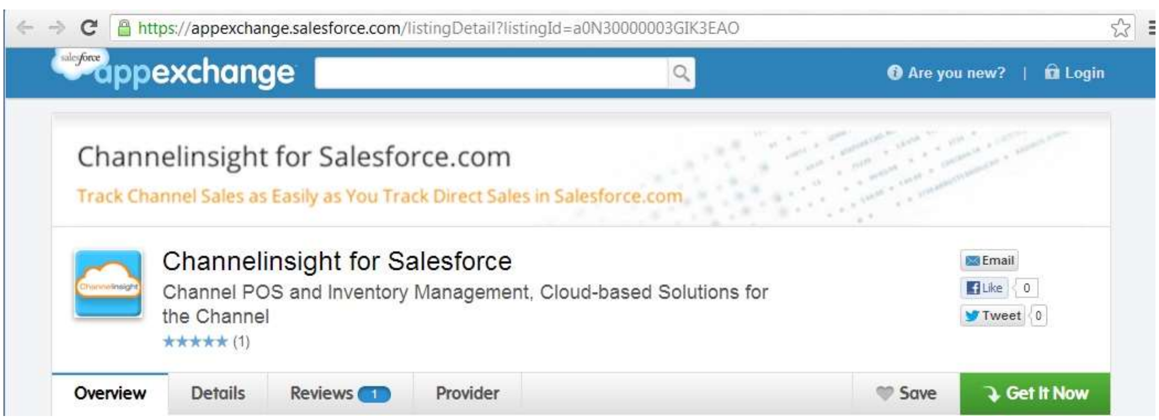
- A System Administrator profile for Channelinsight is required during implementation.
- The password for the profile used by the Channelinsight interface must be set so that is never expires. This profile should have the API enabled permission, and permissions to the Channelinsight package objects, 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.

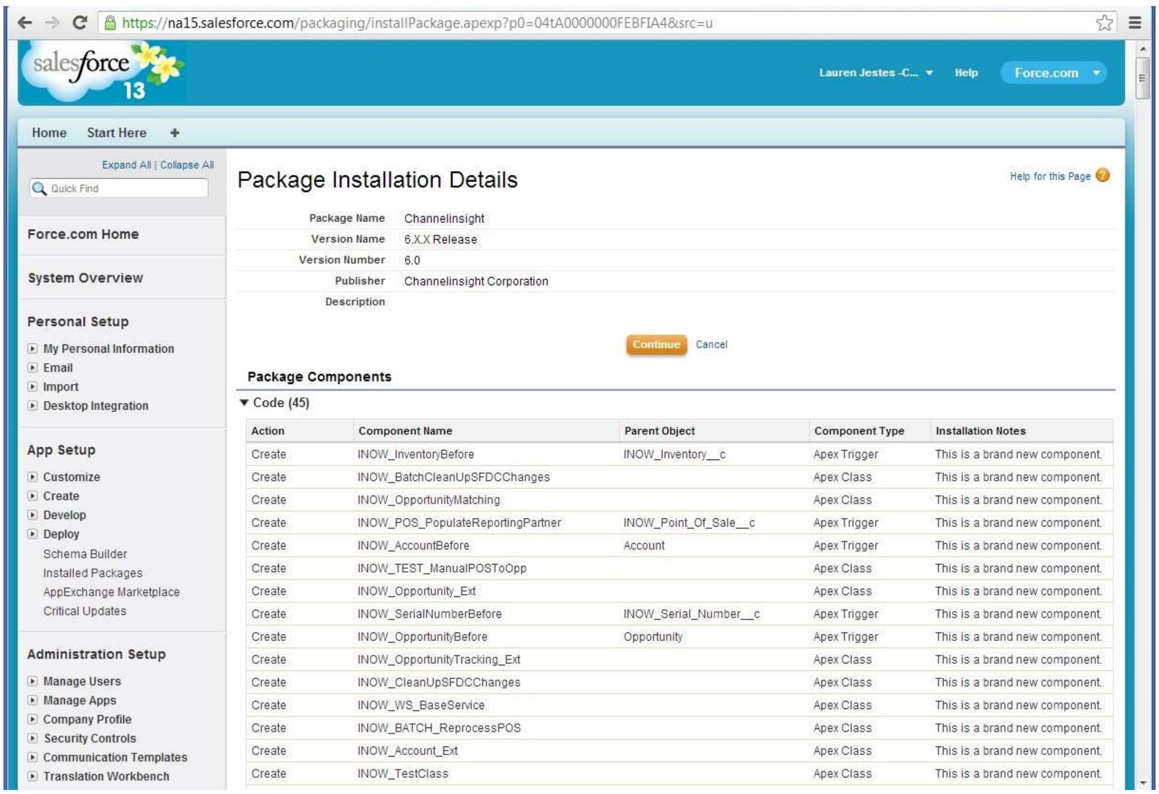
6. Enter your User Name and Password.

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**.



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.

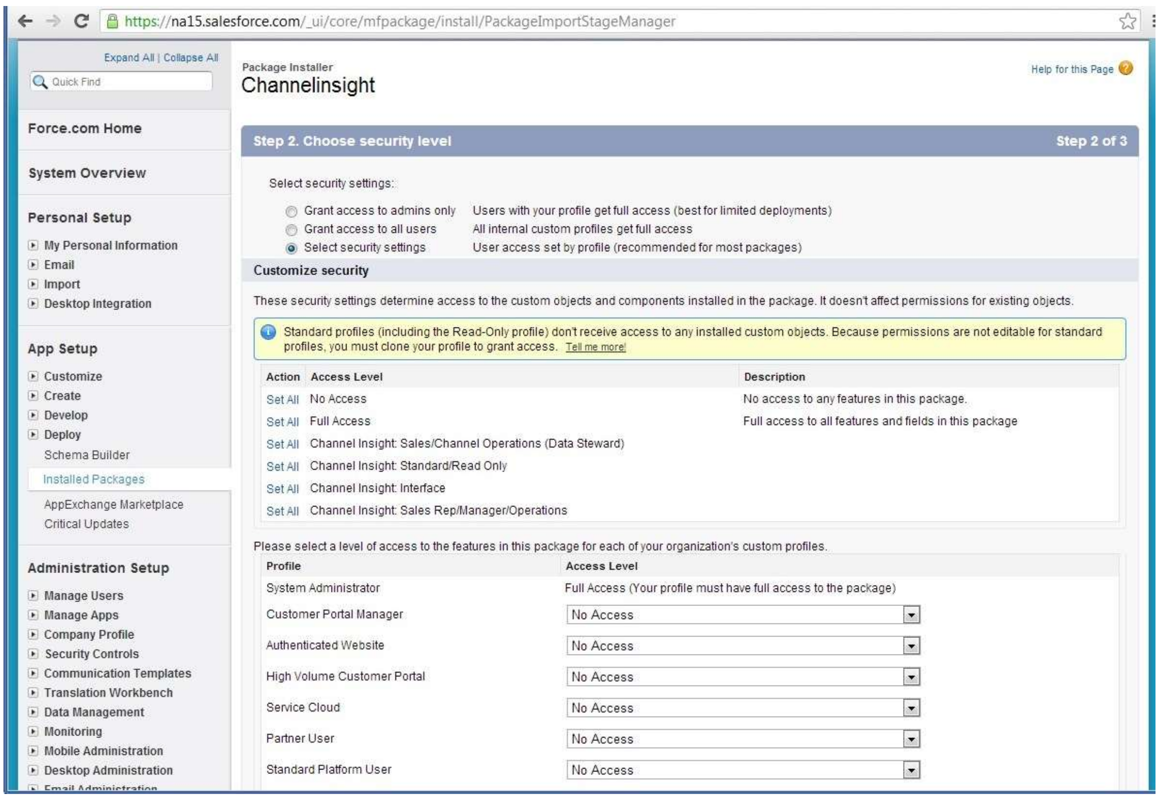
9. Select **Select security settings**.

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**.



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

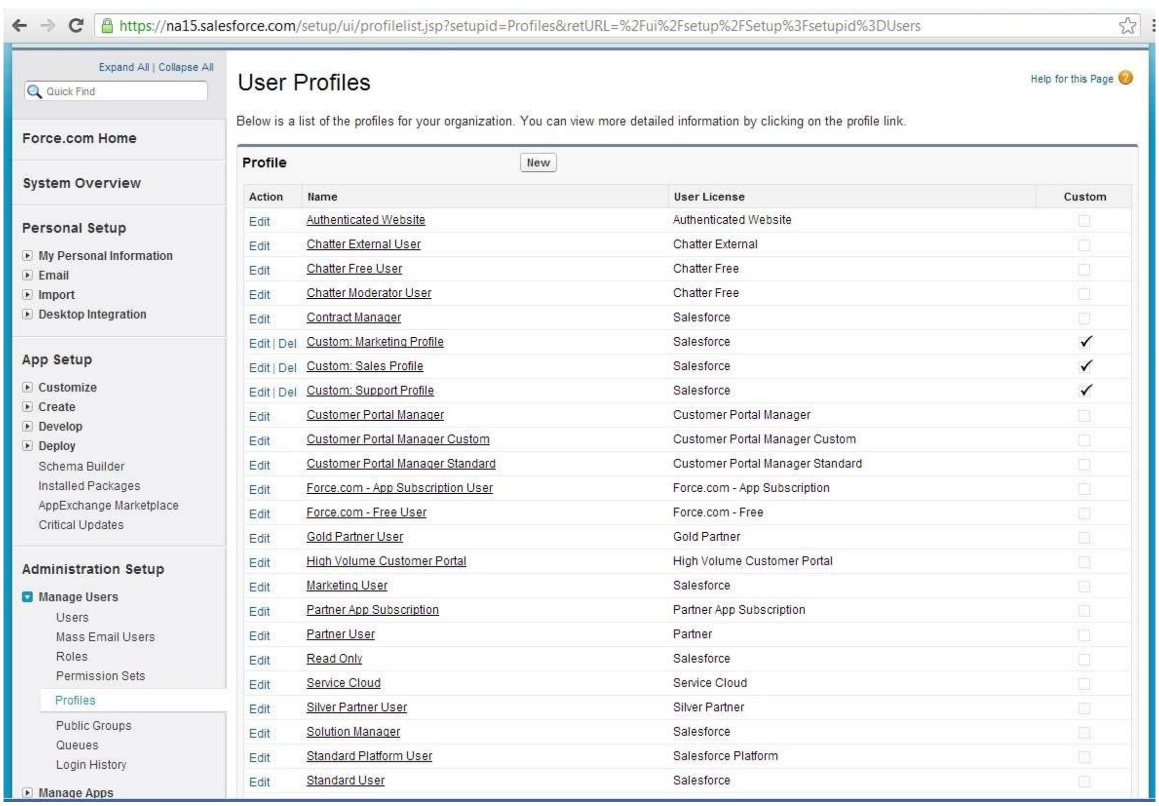
After receiving the install e-mail, you can configure profile settings.

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.



5. 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.

6. 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.

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