

## Preparing for Hands-On Tasks: Setting up Salesforce Sandbox


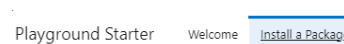
These instructions will guide you through the process of setting up a Salesforce sandbox and storing your OpenAI API secret key. You will also learn how to navigate to the Opportunity page. This is essential to complete the hands-on tasks in the OpenAI and Salesforce integration.

Estimated completion time: 5 – 10 minutes

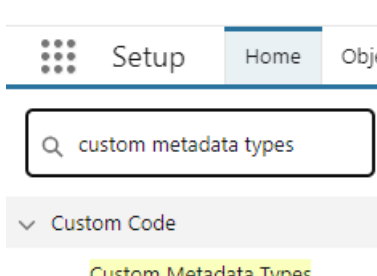
Pre-requisites to complete before this task:

- Preparing for Hands-On Tasks - Setting Up OpenAI and Salesforce Trailhead

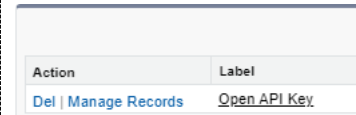
Here are step-by-step instructions for setting up your Salesforce sandbox:

1. Go to <a href="https://trailhead.salesforce.com/today">https://trailhead.salesforce.com/today</a>	
2. In top right corner select "Login"	
3. From the dropdown under "Experiences " select "Trailblazer.me" and login.	
4. In top right corner hover your cursor over the profile icon.	
5. From the dropdown select "Hands-On Orgs"	
6. Select "Launch" next to the sandbox you created previously.	
7. Confirm that you are in the "Playground Starter" app located in the top-left corner of the screen.	
8. If you are not in the "Playground Starter" app, select the app selector icon (nine dots in the top-left corner) and type "Playground Starter" to select it.	
9. In the app, select the "Install a Package" tab.	
10. Paste the following Id in the Package ID field: <b>04t7Q000000246Q</b> .	
11. Select "Install for all users."	
12. Select "Install."	
13. Check "Yes, grant access to these third-party websites" and select "Continue."	
14. Once the package installation is complete, click "Done."	
15. Continue with the steps in the section below	

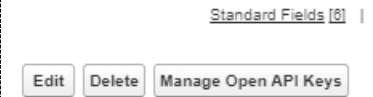
To store your OpenAI API secret key in the playground org, follow these steps:

1. In the top-left corner, type "Custom Metadata Types" in the "Quick Find" box.	
2. Select "Custom Metadata Types."	

3. Under "All Custom Metadata Types," find and select the "Open API Key" label.



4. In the top-middle, select "Manage Open API Keys."



5. Select the "ChatGPT" label.

6. Select "Edit."

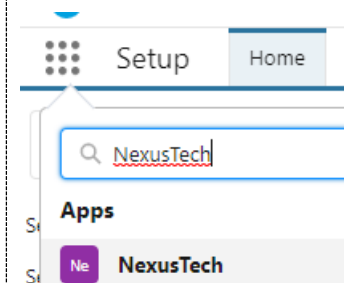
7. Paste your OpenAPI secret key in the "ChatGPTKey" field.

8. Select "Save."

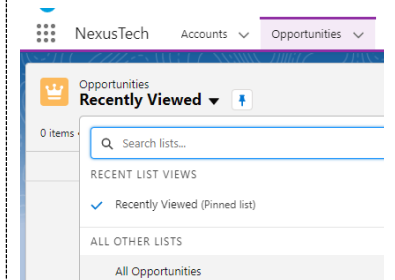
9. Continue with the steps in the section below

To navigate to the Opportunity page, follow these steps:

1. Navigate to the "NexusTech" app from the app launcher (click on the nine dots in the upper-left side, search for "NexusTech" and select it).



2. Select the "Opportunities" tab, click on the "Recently Viewed" text, and choose the list view "All Opportunities."



3. Select any opportunity name from the list.

4. Confirm that your page layout looks like the one shown below.

