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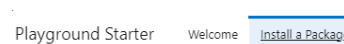
These instructions will guide you through the process of setting up a Salesforce sandbox and storing your OpenAI API secret key. You will also learn how to navigate to the Opportunity page. This is essential to complete the hands-on tasks in the OpenAI and Salesforce integration.

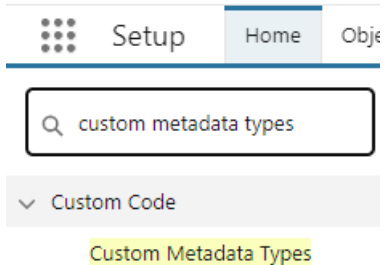Estimated completion time: 5 – 10 minutes

Pre-requisites to complete before this task:

- Preparing for Hands-On Tasks - Setting Up OpenAI and Salesforce Trailhead
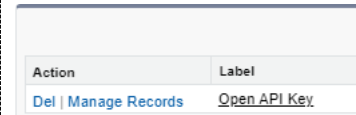
Here are step-by-step instructions for setting up your Salesforce sandbox:

1. Go to https://trailhead.salesforce.com/today

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: **04t7Q000000246Q**.

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."
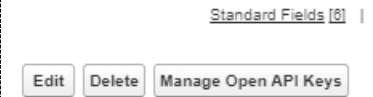
15. Continue with the steps in the section below

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

1. 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.

Action	Label
Del	Manage Records	Open API Key

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

Standard Fields [6] |

Edit Delete Manage Open API Keys
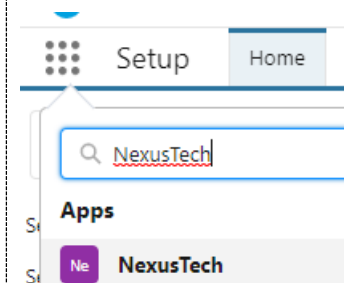
5. Select the "ChatGPT" label.

6. Select "Edit."

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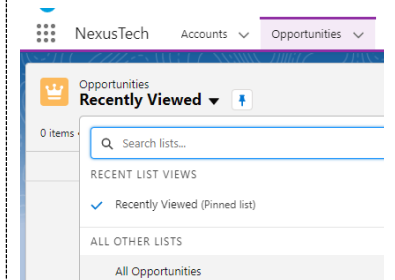
8. Select "Save."

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).

Setup   Home

Q NexusTech

Apps

Ne **NexusTech**

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

NexusTech   Accounts ⌄   Opportunities ⌄

Opportunities
Recently Viewed ▾

0 items

Q Search lists...

RECENT LIST VIEWS

✓   Recently Viewed (Pinned list)

ALL OTHER LISTS

All Opportunities

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

Follow   Edit   New Case   New Note

Account Name	Close Date	Amount	Opportunity Owner
Burlington Textiles Corp of America	25.08.2014	235 000,00 €	Arturs Pugejs

✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓   Closed Won   Change Closed Stage

Chatter   Details

Post   Poll   Question

Share an update...   Share

Sort by:
Most Recent Activity ▼

Search this feed...

AI Query Assistant

Enter your query here:

Submit

Chatter Assistant

Click on "Generate" button to generate a response to the lates chatter feed item

Generate