

## UAT SANDBOX REFRESH - 2023

- Open sandbox list from the setup-

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (highlighted in green), 'Home', and 'Object Manager'. A search bar contains the text 'sandbo'. Below the search bar, a sidebar has a 'Environments' section with a 'Sandboxes' item highlighted in blue. The main content area is titled 'Sandboxes' and contains the following text: 'Didn't find what you're looking for? Try using Global Search.' and 'Sandboxes are special organizations that are used for testing and development. Sandboxes contain specific data sets.'

- Click on Refresh link for the sandbox, which you would like to refresh-

The screenshot shows the 'Sandboxes' list page. The top navigation bar has tabs for 'Sandboxes' (highlighted) and 'Sandbox Template'. Below the tabs is a 'Action' button. At the bottom of the page, there are links: 'Clone | Del | Refresh | Log In'. The 'Refresh' link is highlighted in yellow.

- Click on next for the type of sandbox you have selected in last step

The screenshot shows the 'Sandboxes' list page with several entries:

Action	Name	Type	Status	Created By	Created Date	Last Modified Date	Description
Clone   Del   Refresh   Log In	Dev1	Developer	Completed	CS110	Non-Preview	00D0C0000000f69	23/10/2019, 11:01
Clone   Del   Refresh   Log In	DevAgent	Developer	Completed	CS87	Preview	00D8E000000HcqH	20/04/2022, 12:00
Clone   Del   Refresh   Log In	Develop	Developer	Completed	CS121	Non-Preview	00D3G00000059GJ	03/02/2023, 13:14
Clone   Del   Refresh   Log In	RMDev	Developer	Completed	CS80	Preview	00D250000007s5y	07/06/2021, 15:00
Clone   Del   Refresh   Log In	SIT	Partial Copy	Completed	CS122	Preview	00D3H0000000lgX	03/03/2023, 16:39
Clone   Log In	UAT	Partial Copy	Completed	CS81	Preview	00D26000000lHDw	11/04/2023, 00:19

A note on the right side of the table states: 'Sandbox containing the new piece of work for Salesforce <--> Rightmove Integration.'

Single sign on

**SETUP**

## Single Sign-On Settings

Single Sign-On Settings

Configure single sign-on in order to authenticate users in salesforce.com from external environments. Your organization has the following options available for single sign-on:

- Delegated authentication is a single sign-on method that uses a Web service call sent from salesforce.com to an endpoint.
- Federated authentication, a single sign-on method that uses SAML assertions sent to a Salesforce endpoint.

[Edit](#) [SAML Assertion Validator](#)

**Delegated Authentication**

Disable login with Salesforce credentials  [i](#)

**Federated Single Sign-On Using SAML**

SAML Enabled  Make Federation ID case-insensitive

**SAML Single Sign-On Settings**

Action	Name	SAML Version	Issuer	Entity ID
Edit   Del	SingleSignOn	2.0	https://sts.windows.net/6a65c76a-9e1a-46b0-af9a-50b67f5fd204/	https://graingerplc--uat.sandbox.lightning.force.com

**SETUP**

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**SETUP** My Domain

## Authentication Configuration

**Authentication Configuration**

**Login Page Type:** Standard

**Authentication Service:**  Login Form  SingleSignOn

**Logo File:** Choose File No file chosen

**Background Color:** #F4F6F9

**Right Frame URL:** [Input field]

**Use the native browser for user authentication on iOS:**

**Allow sharing native browser session for user authentication on iOS:**

**Use the native browser for user authentication on Android:**

**Allow sharing native browser session for user authentication on Android:**

**SETUP** My Domain

**Edit**

## Authentication Configuration

**Authentication Configuration**

Authentication configuration settings apply to all deployed and provisioned domains for this org.

**Login Page Type:** Standard

**Authentication Service:** SingleSignOn

**Logo File:** [Input field]

**Background Color:** #f4f6f9

**Right Frame URL:** [Input field]

**Use the native browser for user authentication on iOS:**

**Allow sharing native browser session for user authentication on iOS:**

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**Allow sharing native browser session for user authentication on Android:**

**Edit**

**SETUP**

## Users

Title	Offline User	<input type="checkbox"/>
Company	Flow User	<input checked="" type="checkbox"/>
Department	Service Cloud User	<input type="checkbox"/>
Division	Mobile Push Registrations	<a href="#">View</a>
Address	Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Time Zone	(GMT+01:00) British Summer Time (Europe/London)	Debug Mode
Locale	English (United Kingdom)	<input checked="" type="checkbox"/> <a href="#">i</a>
Language	English	High-Contrast Palette on Charts
Delegated Approver	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>
Manager	Send Apex Warning Emails	<input type="checkbox"/>
Receive Approval Request Emails	Salesforce CRM Content User	<input type="checkbox"/>
Federation ID	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	Make Setup My Default Landing Page	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	Quick Access Menu	<input type="checkbox"/>
Lightning Login	Development Mode	<input type="checkbox"/>
Temporary Verification Code	Show View State in Development Mode	<input type="checkbox"/>
	Cache Diagnostics	<a href="#">View</a>

**SETUP**

## Users

Title	Offline User	<input type="checkbox"/>
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Time Zone	(GMT+01:00) British Summer Time (Europe/London)	Debug Mode
Locale	High-Contrast Palette on Charts	<input checked="" type="checkbox"/> <a href="#">i</a>
Language	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <a href="#">i</a>
Delegated Approver	Send Apex Warning Emails	<input type="checkbox"/>
Manager	Salesforce CRM Content User	<input type="checkbox"/>
Receive Approval Request Emails	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Federation ID	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator	Make Setup My Default Landing Page	<input type="checkbox"/>
App Registration: Salesforce Authenticator	Quick Access Menu	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	Development Mode	<input type="checkbox"/>
Lightning Login	Show View State in Development Mode	<input type="checkbox"/>
Temporary Verification Code	Cache Diagnostics	<a href="#">View</a>

**GREP**

•

Sandbox: UAT

Manager ▾

## SETUP Manage Connected Apps

**Manage Connected Apps**

**Version:** 1.0    **API Name:** GREP    **Created Date:** 17/09/2020, 11:13    **Last Modified Date:** 12/04/2023, 12:39

**Contact Email:** jgeorge@graingerplc.co.uk    **By:** Saji\_Gunasekaran

**Description:** Info URL

**API (Enable OAuth Settings)**

**Consumer Key and Secret:** Manage Consumer Details

**Selected OAuth Scopes:** Full access (full)

**Callback URL:** https://test.salesforce.com/services/oauth2/success

**Enable for Device Flow:**

**Require Secret for Web Server Flow:**

**Require Secret for Refresh Token:**

**Connection strings**

SalesforceClientEndpointUrl	https://graingerplc--uat.my.salesforce.com/services/oauth2/token
SalesforceClientId	3MVG91LYYD8O4krTHz8FRdSm.b1.A4W7.kJ.7mCFzn97lyq_z66s2Nxewc.VhQK8o6Tg8aJD2tU
SalesforceClientSecret	Hidden value. Click to show value
SalesforcePassword	Hidden value. Click to show value
SalesforceUserName	grepintegrationuser@grainger.com.uat

## Asperato

**Asperato Setup**

**CONFIGURATION STATUS**

**Congratulations! Your configuration is set up.**

You can now start processing payments!  
Your customer ID is 2055.  
Need some help taking your first payment? Have a look here for instructions!

**SALESFORCE CONNECTION**

**Great! Your salesforce connection is active.**

**Reconnect Salesforce**

**PAYMENT SERVICE PROVIDER (PSP) CONNECTIONS**

**Merchant group:** Default

**New merchant group:** New merchant group

Need help with merchant groups? Have a look here.

**New PSP connection**

If your chosen PSP isn't available, then email support@asperato.com - we may be able to add it.

GBP	ECOM	Sage Pay/Opayo - Test	Delete
✓	DD	GoCardless - Test	Delete
✓	OB	GoCardless - Test	Delete
✓	MOTO	Sage Pay/Opayo - Test (Asperato)	Delete

**SETUP**

## Custom Settings

### Asperato ONE settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

		<b>Edit</b>	<b>Delete</b>
<b>Default Organization Level Value</b>			
Location	Grainger PLC	BACS Delay	7
Create Payment Schedule	<input type="checkbox"/>	Customer ID	2055
Is Running Live <input checked="" type="checkbox"/>		Server URL	test.protectedpayments.net
Enable Payauth URL Data Integrity	<input checked="" type="checkbox"/>	Suppress Notification for Payments <input type="checkbox"/>	
View: <b>All</b> <input type="button" value="Create New View"/> A   B   C   D   E   F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other <b>All</b>			
Setup Owner <b>+</b>		Location	

### WEBAPP

**SETUP**

## Custom Labels

Custom Label WebAppURL

**Custom Label Detail**

		<b>Edit</b>	<b>Delete</b>
Short Description	WebAppOfferLink	Name	WebAppURL
Language	English		
Categories	<input type="checkbox"/> Value <a href="https://master.d3b17bm52ya3f.amplifyapp.com/signup/">https://master.d3b17bm52ya3f.amplifyapp.com/signup/</a>		
Created By	Gar Cheung, 21/07/2020, 14:25	Modified By	Saji.Gunasekaran, 12/04/2023, 20:23
<input type="button" value="Edit"/> <input type="button" value="Delete"/>			

Username - [integrationuser@grainger.com.uat](mailto:integrationuser@grainger.com.uat)

Password - Graingerplc123

**System Info**

Installed By	David Picksley	Installed Date	22/07/2020, 10:17
Last Modified By	Jaic George	Last Modified Date	17/04/2023, 13:53

**Basic Information**

Info URL	Start URL
	Mobile Start URL

**OAuth Policies**

Permitted Users	All users may self-authorize	IP Relaxation	Relax IP restrictions
Usage	<a href="#">View OAuth Usage</a>	Refresh Token Policy:	Immediately expire refresh token
Single Logout	Single Logout disabled		
Application Permissions:	Full access		

**Session Policies**

Rightmove URL generation has to be coordinate with Rightmove customer care team which is done and now URL is generating in the opportunity contact role in Reference Application Form URL

Opportunity Apple Tree- Tenant Search Tenancies...

\*Contact

Contact Full Name Apple Tree Direct Debit Amount

Role Lead Tenant Reference Check Status Not Started

Relationship --None-- Exempt Referencing

Other

Active

**Reference Application Form Url** 

Please find below the Rightmove URL endpoints for the test site.

### Testing URLs

<https://adfdapi.adftest.rightmove.com/v1/property/sendpropertydetails>

<https://adfdapi.adftest.rightmove.com/v1/property/removeproperty>

<https://adfdapi.adftest.rightmove.com/v1/property/getbranchpropertylist>

USER EMAIL ADDRESS BULK UPDATE to Remove .invalid

User

## Ros Thornton

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#)  
[Install](#)

### User Detail

[Edit](#) [Share](#)

Name	Ros Thornton
Alias	RThornto
Email	rthornton@graingerplc.co.uk <span style="background-color: yellow;">invalid</span> <a href="#">[Verify]</a> <a href="#"></a>
Username	rthornton@graingerplc.co.uk.uat
Nickname	User1632349965872461432 <a href="#"></a>

(Currently we do not have permissions that would allow the user to mass update user email address without generating email verifications to the end users. Should request salesforce to disable email change verification and then make changes to the users email addresses)

Named Credential: Should change the URL to UAT URL -(Get it from Jaic)



Sandbox: UAT

Search Setup

Manager ▾

## SETUP Named Credentials

< Back to Named Credentials

	<a href="#">Edit</a>	<a href="#">Delete</a>
Label	GraingerApi_MediaAssets	
Name	GraingerApi_MediaAssets	
URL	<a href="https://3cpf78sc55.execute-api.eu-west-2.amazonaws.com/prod">https://3cpf78sc55.execute-api.eu-west-2.amazonaws.com/prod</a>	
<b>Authentication</b>		
Certificate		
Identity Type	Named Principal	
Authentication Protocol	Password Authentication	
Username	x-api-key	
<b>Callout Options</b>		
Generate Authorization Header	<input type="checkbox"/>	
Allow Merge Fields in HTTP Header	<input checked="" type="checkbox"/>	

Publish units to sandbox Rightmove

Go to below link

### Custom Metadata Types

[Custom Metadata Types | Salesforce](#)

then go to **Integration Setting**

Click **Manage integration settings**

SETUP Custom Metadata Types

Custom Metadata Type Integration Setting Help for this Page

Standard Fields [8] | Custom Fields [1] | Validation Rules [0] | Page Layouts [1]

Custom Metadata Type Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Manage Integration Settings</a>
Singular Label	Integration Setting			Description: Settings for managing 3rd party integrations, e.g. RightMove
Plural Label	Integration Settings			Visibility: Public
Object Name	Integration_Setting			Protection Level
API Name	Integration_Setting_mdt			Record Size: 1,986
Created By	Mohammad Usman, 19/07/2021, 19:04			Modified By: Mohammad Usman, 19/07/2021, 19:04
<b>Standard Fields</b>				
Action	Field Label	Field Name	Data Type	Indexed
<a href="#">Edit</a>	Created By	CreatedBy	Lookup(User)	
<a href="#">Edit</a>	Custom Metadata Record Name	DeveloperName	Text(40)	
<a href="#">Edit</a>	Label	MasterLabel	Text(40)	
<a href="#">Edit</a>	Last Modified By	LastModifiedBy	Lookup(User)	

Get the highlighted below details from Rightmove for sandbox and change it

Edit   Del	Righmove_Certificate Name	Listing Handling	Rightmove_cert_name	Rightmove_API_Test	
Edit   Del	Righmove Listing Let_Type	Listing Handling	Rightmove_property.let_type	1	
Edit   Del	Righmove Listing Manual Removal reason	Listing Handling	Rightmove_removal_reason	11	
Edit   Del	Rightmove agent ref	Listing Mapping	Rightmove		Unit
Edit   Del	Rightmove API removeProperty	Listing Handling	Rightmove_api_endpoint_removeproperty	https://adfafpi.adftest.rightmove.com/v1/property/removeproperty	
Edit   Del	Rightmove API sendProperty	Listing Handling	Rightmove_api_endpoint_sendproperty	https://adfafpi.adftest.rightmove.com/v1/property/sendpropertydetails	

**SETUP** Custom Metadata Types

Edit   Del	Rightmove_Property_Price	Listing Mapping	Rightmove	PricebookEntry	
Edit   Del	Rightmove_Property_Removal_Reason	Listing Mapping	Rightmove	Unit	U
Edit   Del	Rightmove_Property_Status	Listing Mapping	Rightmove	Unit	U
Edit   Del	Rightmove_Property_Summary	Listing Mapping	Rightmove	Unit	U
Edit   Del	Rightmove_Property_Town	Listing Mapping	Rightmove	Unit	C
Edit   Del	Rightmove_Property_Type	Listing Mapping	Rightmove	Unit	P
Edit   Del	Rightmove_Ref_field	Listing Handling	Rightmove_ref_field	property.agent_ref	
Edit   Del	Rightmove_Sharees_Considered	Listing Mapping	Rightmove	Building	S
Edit   Del	Rightmove_Site_URL	Listing Handling	Rightmove	https://www.adftest.rightmove.com/properties/	

### Congo composer set up -

Create a new template

The screenshot shows the Conga Composer interface with the 'Conga Templates' section open. A new template named 'CMT-00017' has been created and is listed in the recently viewed section. The template details are as follows:

Template Name	Name	Description	Template Group	Template Type	Last Modified Date	Last Modified By
CMT-00017	AST 2023		Document	Document	12/06/2023, 10:39	Saji Gunasekaran
CMT-00018	Parking 2020		Document	Document	11/06/2023, 12:20	Saji Gunasekaran

Key will automatically generated

The screenshot shows the Conga Composer interface with the template details page open for 'CMT-00017'. The template details are as follows:

Details	Related
Template Name	CMT-00017
Name	AST 2023
Template Group	Master Field to Set 1
Template Type	Document
Key	0T_017EA0887950
Description	
Created By	Saji Gunasekaran, 11/05/2023, 12:19
Last Modified By	Saji Gunasekaran, 12/06/2023, 10:35

## Have to raise a ticket with congo support

An unexpected error occurred while attempting to connect. Error code: 1013. To resolve this issue, submit a case with the specific error code above to Conga Support.

**CONFIGURATION**

- Composer Configuration
- Integration Partners
- Email
- eSignature
- Document Storage
- Usage Dashboard
- Enterprise
- External Data Sources

**CONGA APPS**

- Batch - Coming Soon
- Trigger - Coming Soon

**COMPOSER SETTINGS**

**Composer Configuration**

**Salesforce Org ID:** 00D260000000HDeEA0

**Service User:** Refresh Token Status Refresh

**Enable Notification Emails:** Refresh Token Status Refresh

**Conga File Storage for Link Service:** Refresh Token Status Refresh

**Local Templates:** Permit users to upload a template from a local directory. (Recommended)

**Conga Template Manager:** Instead of using the Salesforce Mail Merge Templates repository (Communication Templates), we strongly recommend that you store templates in the Conga Template Manager. This custom object is included with Conga Composer. Doing so has the following benefits:

## Update the template id for this "Congo Document Id"

SETUP > OBJECT MANAGER  
Tenancy

**Contract Custom Field**  
**Conga Document Id**  
Back to Contract Fields

**Fields & Relationships**

**Custom Field Definition Detail**

Field Information		Formula Options	
Field Label: Conga Document Id	Data Type: Formula	Object Name: Contract	Created By: David Picklesay 20/07/2020, 16:43
Field Name: Conga_Document_Id	Formula:	Modified By: Sai Gunasekaran 30/08/2023, 15:51	
API Name: Conga_Document_Id_c			
Description:			
Help Text:			
Date Owner:			
Field Usage:			
Data Sensitivity Level:			
Compliance Categorization:			
Created By: David Picklesay 20/07/2020, 16:43			
Modified By: Sai Gunasekaran 30/08/2023, 15:51			

Create the Conga Query for all the below as see in the screenshot

All | Conga Queries | Salesforce

Conga Queries							New	Import	Change Owner	Printable View
24 items • Sorted by Conga Query Name • Filtered by All conga queries • Updated a few seconds ago							<input type="text"/> Search this list... <span style="margin-left: 10px;">(B)</span> <span style="margin-left: 10px;">(C)</span> <span style="margin-left: 10px;">(G)</span> <span style="margin-left: 10px;">(E)</span>			
	Conga Query Name	↑	Name	Description	Last Modified Date	Last Modified By				
1	CMQ-0024		Opportunity		14/07/2023, 09:54	Saji Gunasekaran				
2	CMQ-0025		Unit for Tenancy		14/07/2023, 09:55	Saji Gunasekaran				
3	CMQ-0026		OCR Lead Tenant		14/07/2023, 09:55	Saji Gunasekaran				
4	CMQ-0027		Special Clauses on Tenancy		14/07/2023, 09:58	Saji Gunasekaran				
5	CMQ-0028		Tenancy Payment Schedule		14/07/2023, 09:58	Saji Gunasekaran				
6	CMQ-0029		Parking Payment Schedule		14/07/2023, 10:07	Saji Gunasekaran				
7	CMQ-0030		Offer		14/07/2023, 10:10	Saji Gunasekaran				
8	CMQ-0031		Shed Parking Schedule		14/07/2023, 10:10	Saji Gunasekaran				
9	CMQ-0032		OCR Guarantor		14/07/2023, 10:11	Saji Gunasekaran				
10	CMQ-0033		OCR Relevant Person		14/07/2023, 10:11	Saji Gunasekaran				
11	CMQ-0034		OCR Permitted Occupier		14/07/2023, 10:14	Saji Gunasekaran				
12	CMQ-0035		OCR Tenant Offset 0		14/07/2023, 10:14	Saji Gunasekaran				
13	CMQ-0036		OCR Tenant Offset 1		14/07/2023, 10:15	Saji Gunasekaran				
14	CMQ-0037		OCR Tenant Offset 2		14/07/2023, 10:16	Saji Gunasekaran				
15	CMQ-0038		Offer Line Items		14/07/2023, 10:17	Saji Gunasekaran				
16	CMQ-0039		OCR TSign		14/07/2023, 10:18	Saji Gunasekaran				
17	CMQ-0040		OCR Lead Tenant (Parking)		17/07/2023, 10:24	Saji Gunasekaran				
18	CMQ-0041		OCR Tenant (Parking)		14/07/2023, 10:19	Saji Gunasekaran				
19	CMQ-0042		OCR Tenant (Shed)		14/07/2023, 10:19	Saji Gunasekaran				
20	CMQ-0043		NHA OCR Company		14/07/2023, 10:20	Saji Gunasekaran				
21	CMQ-0044		NHA OCR Company 2		14/07/2023, 10:20	Saji Gunasekaran				
22	CMQ-0045		OCR Lead Tenant (Shed)		14/07/2023, 10:20	Saji Gunasekaran				
23	CMQ-0046		OCR Tenant		14/07/2023, 10:24	Saji Gunasekaran				
24	CMQ-0047		Tenant Names		14/07/2023, 10:25	Saji Gunasekaran				

Update the Conga queries ID in the Generate document button

Tenancy | Salesforce

Sandbox: UAT | Log out

Search... ★ + ? ⚙ 🔍

Conga Composer Home Conga Quick Start Conga Composer Setup About Conga Composer Conga Solutions Edit 1 Doc Selection - Ad... X \* Recently Viewed X M

**Agreement Template**  
1 Doc Selection - Adobe Template

Last Saved 19/07/2023, 09:58 Save ▾

**TEMPLATE DETAILS** ATTACHMENT RECIPIENTS DATA MAPPING RULES

\* Agreement Name !  
Adobe Sign Agreement

Salesforce Object !  
Tenancy

Mapped data ! Map data into agreement fields

MAPPING METHOD SOURCE FIELD TARGET AGREEMENT FIELD

ID: a0Y26000008GWBZEA4 Active

Created By: Saji Gunasekaran  
Owner: Saji Gunasekaran  
Last Modified By: Saji Gunasekaran

 Learn more Add an Agreement Name

Update the Agreement template ID in the tenancy object (Tenancy | Salesforce) Adobe Agreement Template Id

SETUP > OBJECT MANAGER

## Tenancy

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets

```

    OR(
        IF(INCLUDES(Document_Type__c, "AST"),
            True,
            IF(INCLUDES(Document_Type__c, "Live Work Agreement"),
                True,
                IF(INCLUDES(Document_Type__c, "NHA Company Let"),
                    True,
                    False)
            ))
        ),
        CASE(
            Doc_Selection_Stamped__c,
            1, "a0Y26000008GWBZEA4",
            2, "a0Y4J000000kaRdUAI",
            3, "a0Y4J000000kaRiUAI",
            4, "a0Y4J000000kaRjUAI",
            5, "a0Y4J000000kaRkUAI",
            6, "a0Y4J000000kaRwUAI",
            7, "a0Y4J000000kaRIUAI",
            8, "a0Y4J000000kaRmUAI"
        )
    )
}

```