buildee Salesforce App

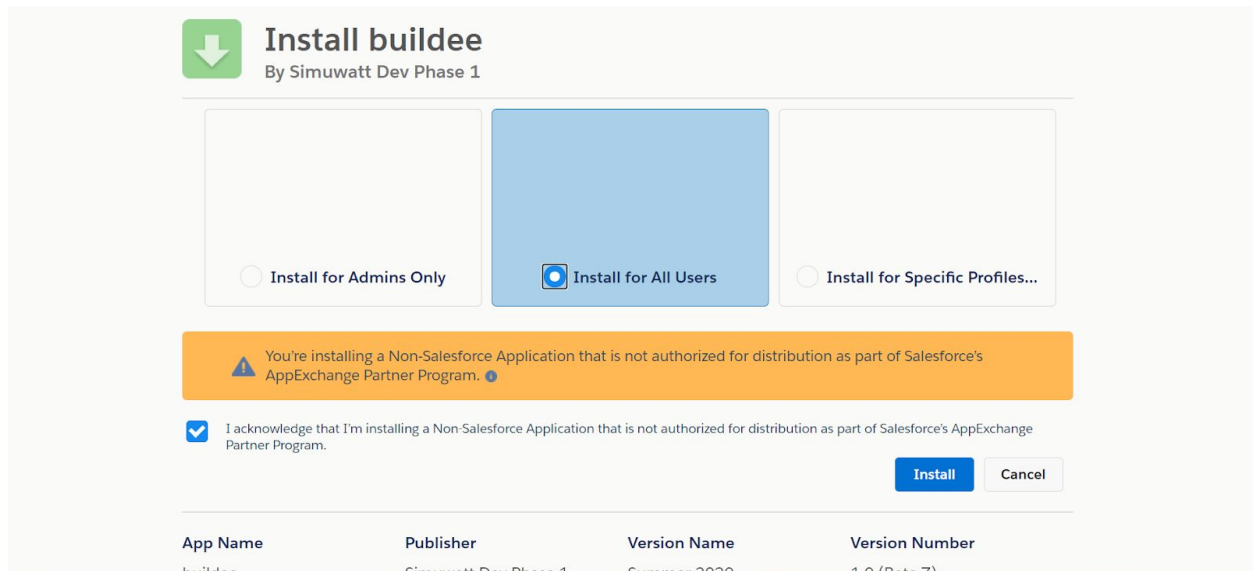**User Configuration Document**

Overview

The buildee Salesforce App enables you to connect buildee with your Salesforce instance and import buildings, measures, projects and equipment data. Simply install the app, sign into your buildee account, configure your Salesforce objects and fields, and enable syncing.

App Installation

To get started, click here to install the app. Once the app is installed, a buildee lightning app will be created in Salesforce. If you receive any permission requests in the process be sure to confirm access. The app can be found in your app launcher.

Pre-Configuration Steps

After the app is installed, set-up access permissions:

1. Create and assign permission to the admin user

    a. Go to permission sets and create a new permission set named 'buildee app access'.

    b. In the permission set, go to assigned connected apps, and assign buildee connected app to it.

    c. Go to manage assignments for this permission set, and assign this permission set to the admin user who installed the app and is configuring the app.

Create

Save | Cancel

Enter permission set information   ▌ = Required Information

Label ▌ buildee app access

API Name ▌ buildee_app_access [i]

Description [   ]

Session Activation Required ☐ [i]

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '--None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? Learn more here.

License [--None-- ▾]

Save | Cancel

Permission Set Overview > **Assigned Connected Apps** ▼

Assigned Connected Apps   Save | Close

Installed Connected Apps   **Enabled Connected Apps**

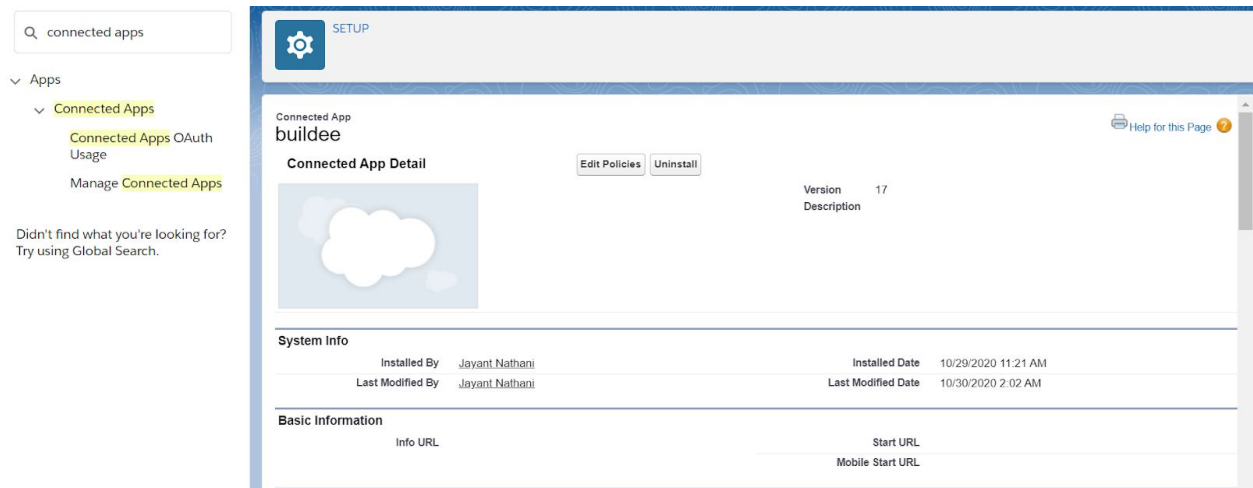| Ant Migration Tool | buildee |
Dataloader Bulk	
Dataloader Partner	
Force.com IDE	
Salesforce Mobile Dashboards	
Salesforce Touch	
Salesforce for Outlook	
SalesforceIQ	
Workbench	

Add ▶
◀ Remove

2. Go to setup, and then manage connected apps and click on edit policies.

3. Set Oauth Policies:

    a. Change permitted users to Admin approved users are pre-authorized.

    b. Set IP Relaxation to Relax IP Restrictions.

    c. Set refresh token policy to immediately expire refresh token.

    d. Click on save.

App Configuration Steps

Your next steps are to sign into buildee, configure objects and fields, and sync.

STEP 1: Configure Authentication

1. Open the buildee app from the app launcher.

2. Go to the App Configuration tab.

3. Enter your buildee credentials and click on verify.

4. Your authentication status will be set to authentication complete.

STEP 2: Configure Mappings

1. When you install buildee app, the associated objects for buildings, measures and equipment are automatically created in your salesforce instance.

2. buildee app also allows you to use your own existing objects for building, project and measures if you want to reuse them and not use the app supplied objects.

3. If you want to use the buildee app supplied objects, go to Mapping Configuration tab and just click on Confirm Mapping to confirm the mapping.

4. Want to use your own objects? You can configure this.

   a. Go to the building, equipment, measure, or project mapping section and select configure fields. This will reveal a mapping of building fields and your objects.

   b. By default, only compatible field types are shown but you can click on show all fields checkbox to see all the fields of the selected object to assign to. This can create problems in mapping, if for example you use a date field mapping when buildee stores data in string, etc.

   c. It is mandatory to select a mapping for all required fields, and assign an external id field as mapping for each object ID field.

   d. After field mappings are done for buildings, measures and projects, click on confirm mappings.

   e. If there are any issues in your mapping the confirm mapping process will fail. The issues may be:

      i. Some required fields are not mapped for some objects.

      ii. Some lookup fields are not populated in the mapping.

      iii. You are using a mix of buildee supplied objects and your own objects. without creating fields to establish a relationship between them.

      iv. Correct the issues and then confirm your mapping.
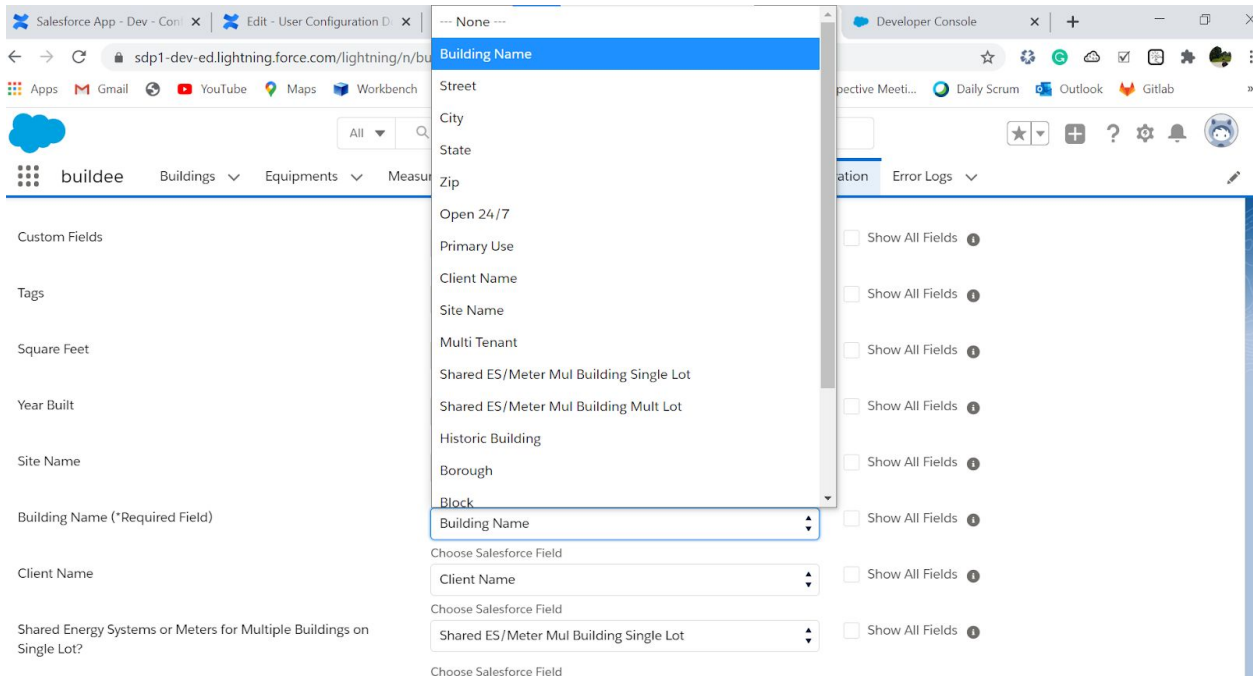
5. Mappings can be edited at any time. We recommend pausing the sync during this
    process to avoid undesired mappings.
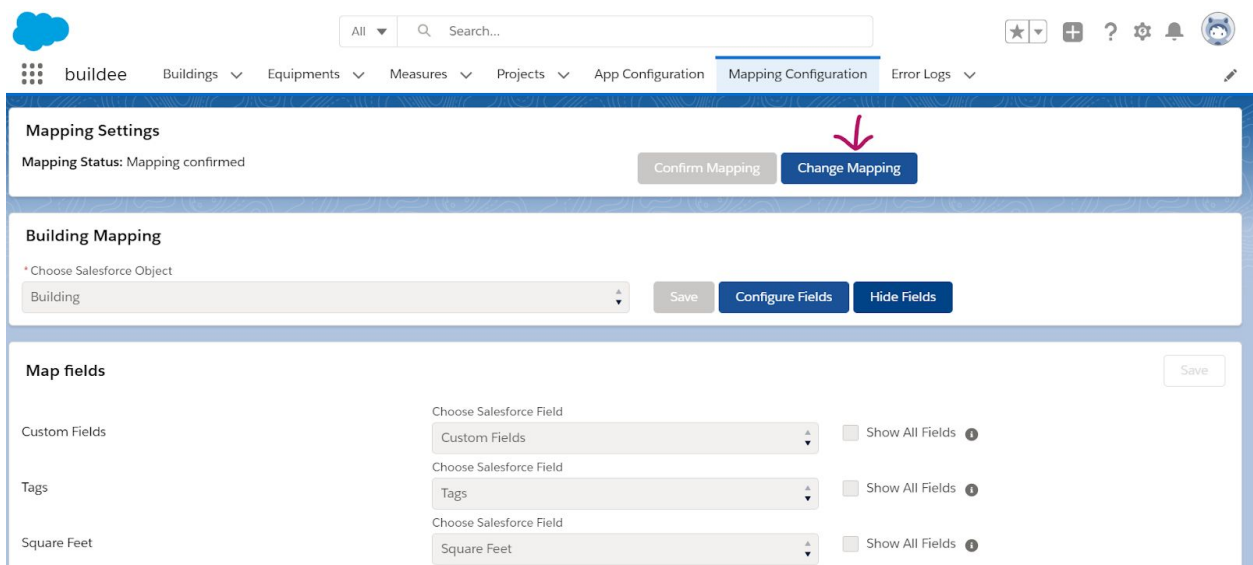
6. After editing your mappings, click on confirm mapping to reconfirm mapping and do
    STEP 3 again.

STEP 3: Data Syncing

1. After completing steps 1 and 2, go to the App Configuration tab.

2. Click on enable data syncing.

3. After this is enabled, an initialization will happen to get all the records you have access to. And any time buildee data is updated, it will be reflected back to salesforce.

buildee Salesforce App Objects

The app consists of following tabs:

1. Buildings

    a. This contains all the buildings that have been imported from buildee.

    b. This tab will contain data only if you use buildee objects from the app itself and have not changed the mappings.

    c. If you have changed the mappings, your data will be available in the object that you mapped buildings to in STEP 2.

2. Equipment

    a. This contains all the equipment that have been imported from buildee.

    b. This tab will contain data only if you use buildee objects from the app itself and have not changed the mappings.

    c. If you have changed the mappings, your data will be available in the object that you mapped measures to in STEP 2.

3. Measures

    a. This contains all the measures that have been imported from buildee.

    b. This tab will contain data only if you use buildee objects from the app itself and have not changed the mappings.

    c. If you have changed the mappings, your data will be available in the object that you mapped measures to in STEP 2.

4. Projects

    a. This contains all the projects that have been imported from buildee.

    b. This tab will contain data only if you use buildee objects from the app itself and have not changed the mappings.

    c. If you have changed the mappings, your data will be available in the object that you mapped projects to in STEP 2.

5. App Configuration

    a. This tab contains the information for STEP 1, 2 and 3 mentioned earlier.

6. Mapping Configuration

    a. This tab is responsible for performing the actions specified in STEP 2.

7. Error Logs

    a. Any errors generated during using the app will be recorded in error logs.

    b. An error can happen if the data sync could not happen due to field mismatch, or validation rules, or any other reason.

    c. The error log will contain an object id of the buildee record which could not be synced correctly.