Note: If installing 17.39 – 17.41 check the manual step #1 in 17.39. Correct the picklist values for csusracctcntl\_txnid\_\_c \_\_c.

~~Note: Disable ‘Enable Content Sniffing protection’ if the setting is enabled:~~

~~Setup > Security Controls > Session Settings > Enable Content Sniffing protection~~

1. Verify the Platform User licenses have been provisioned from Salesforce
2. Verify a “Full” license sandbox exists or has been provisioned from Salesforce
3. ~~Disable Sniffing protection to avoid issues with the Employee field on Mfg User record~~
   1. ~~Setup > Security Controls > Session Settings > Enable Content Sniffing protection~~
4. Install "Apex-lang" package from the Salesforce AppExchange on to your Salesforce org
   1. Setup > App Setup > AppExchange Marketplace OR  
      Setup > Build > AppExchange Marketplace
   2. Search for Apex-lang and select ‘Get It Now’
   3. If installing on a sandbox:
      1. Log into the AppExchange using your personal ‘production’ credentials
      2. Select the Sandbox option
      3. Enter your sandbox credentials when prompted
   4. Select ‘Grant access to all users’ when prompted on ‘Step 2. Choose security level’.
5. Enable Quote Object - The Quote page layout contains a custom Rootstock button for creating Sales Orders.
   1. Setup > App Setup > Customize > Quotes > Settings OR  
      Setup > Build > Customize > Quotes
   2. Select 'Enable Quotes' checkbox and Save (Note: this feature may already be enabled on customer orgs)
   3. If prompted , select the Opportunity Layout option.
6. Enable Language Translation - this is required for reports which reference a language filter
   1. Setup > Administration Setup > Translation Workbench > Translation Settings OR  
      Setup > Administer > Translation Workbench > Translation Settings
   2. Select 'Enable' button (Note: this feature may already be enabled on customer orgs)
   3. Adding supported languages is NOT necessary
7. Add Salesforce profiles.  When the package is installed and upgraded, these profiles will be updated with the appropriate Rootstock permissions.  These profiles can then be cloned and modified to create specific profiles for individuals using the ERP app.
   1. Setup > Administration Setup > Manage Users > Profiles OR  
      Setup > Administer > Manage Users > Profiles
   2. If FinancialForce Accounting is already installed:
      1. Clone the FinancialForce Accountant profile and name it “RS/FF User - Full Access”. Edit properties and set description to “Contains full Rootstock permissions and full FinancialForce Accountant permissions.”
   3. If FFA is to be installed after RS:
      1. Clone the Salesforce ‘Standard User’ profile and name it “RS/FF User - Full Access”. Edit properties and set description to “Contains full Rootstock permissions and full FinancialForce Accountant permissions.”
      2. FinancialForce will apply the “FinancialForce Accountant” permissions to the “RS/FF User - Full Access” profile during their package installation.
   4. Clone from the Salesforce ‘Standard User’ Profile – Salesforce License and name it “RS Standard User - Full Access”.
      1. Edit profile and enable Create/Edit/Delete permissions on Products standard object
      2. Edit properties and set description to:  
         Contains full access to Rootstock ERP and no access to Rootstock Financials.   
         Do not modify this profile. If changes are necessary then clone the profile and preface the name with RS.
   5. Clone from the Salesforce ‘Standard Platform User’ Profile – Salesforce Platform License and name it “RS Standard Platform User - Full Access”. Edit properties and set description to:  
      Contains full access to Rootstock ERP and no access to Rootstock Financials.   
      Do not modify this profile. If changes are necessary then clone the profile and preface the name with RS.
8. Clone existing custom profiles based on customer requirements. Be sure to clone any existing profiles needing RSF permissions.
9. The standard RSF profiles will be created during the RSF install.
10. FOR ALL ERP PROFILES USING A ‘SALESFORCE’ LICENSE:
    1. Edit the profile OR System Permissions section and verify the “Customize Application” setting is enabled.
    2. Profiles using a Platform license do not have this setting.
11. FOR ALL ERP PROFILES USING A ‘PLATFORM’ LICENSE:
    1. Edit the profile OR Objects Settings section
12. For all RS, RSF, RS/FF profiles regardless of license type:
    1. Verify the ‘Run Reports’ permission is enabled
    2. Enable ‘View All’ permission on the SF Accounts object (this is needed to avoid ‘insufficient access’ errors when running transactions like PO Receipt – see ticket 24675
13. Install ERP package using the latest release URL:
    1. Install latest available ERP version based on ticket 20000. Installation URL is in the ‘Manual Steps Doc’ for the current quarterly release or from PDE4. Replace ‘login’ with ‘test’ if installing in a sandbox.
    2. If prompted for ‘Approve Third-Party Access’, select Yes and Continue.
    3. Select ‘Install for Specific Profiles...’ option and apply ERP permissions to profiles:
       1. Select ‘RS Full Access Platform Users ‘ access level for the following:
          1. RS Standard User - Full Access
          2. RS Standard Platform User - Full Access
          3. RS/FF User - Full Access (if using FFA)
          4. And any other existing customer profiles needing access to ERP/RSF based on customer requirements
    4. Select Install
    5. An email will be sent when the installation completes (1-2 hours)
14. Expose ERP App and Tabs on Profiles:
    1. Setup > App Setup > Apps > OR  
       Setup > Build > Create > Apps
       1. Edit the ERP app
       2. Set 'Visible' for System Administer profile and all profiles updated with permission during installation
15. Add Remote Site Settings. These settings are required for Rootstock email templates that are used when generating forms such as Purchase Orders.
    1. Setup > Administrative Setup > Security Controls > Remote Site Settings OR  
       Setup > Administer > Security Controls > Remote Site Settings  
       Add the following records:
       1. Remote Site Name: SalesforceApex, Remote Site URL: <https://instanceName-api.salesforce.com>. The instanceName can be found in the URL (e.g. ‘na10’ or ‘domainName.na10.my’ if using Domain Management).
       2. Remote Site Name: SalesforceServer, Remote Site URL: <https://instanceName.salesforce.com>. The instanceName can be found in the URL (e.g. ‘na10’ or ‘domainName.na10.my’ if using Domain Management).
       3. Remote Site Name: SalesforceLogin, Remote site URL: <https://login.salesforce.com>
       4. Remote Site Name: SalesforceTestLogin, Remote site URL: <https://test.salesforce.com>
       5. Example when org has a domain name in the URL:
          1. KJM production:
             1. SalesforceApex - https:// kjmcontractors.my-api.salesforce.com
             2. SalesforceServer - https:// kjmcontractors.my.salesforce.com
          2. KJM sandbox:
             1. SalesforceApex: https://kjmcontractors--RSPilot.cs5.my-api.salesforce.com
             2. SalesforceServer: https://kjmcontractors--RSPilot.cs5.my.salesforce.com
16. Add IP address to Network Address to avoid using a token
    1. Setup > Administer > Security Controls > Network Access
    2. Use whatismyip.com to get current IP address
    3. Enter IP address for Start and End range
    4. Add your initials in the Description field
17. Import RS menu records using the Salesforce Data Loader – be sure to use the correct CSV file based on the ERP version being installed. Major release versions are in SVN. If no CSV file matches the build to be installed then be sure to run any menu scripts for subsequent releases using the manual steps doc.
    1. Open Data Loader
    2. Be sure the Server Host Field under Settings is set to <https://login.salesforce.com> for production orgs and <https://test.salesforce.com> for sandbox orgs
    3. Select Insert and enter target org login credentials (be sure to log out before using on a different target org). If login fails it’s due to not adding IP address to Network or the Server Host Field is not properly set.
    4. Next
    5. Select Menu object
    6. Select the appropriate csv file
    7. Next
    8. OK on the popup window
    9. Create or Edit a Map button
    10. Auto-Match Fields to Columns button
    11. OK
    12. Next
    13. Set Directory to c:\temp or something similar
    14. Finish
    15. Yes to proceed
    16. Approximately 260 records should be added with no failures
    17. Verify by display the Site Map menu records
        1. Select the ERP app from the app dropdown (upper right)
        2. Select Rootstock Site Map tab
18. Import helpsetup\_\_c records using the helpsetup.csv file in SVN (manual steps folder). These records are required for ERP/RSF Page Help.
    1. Use Data Loader to add records in helpsetup\_\_c
       1. When importing the CSV file, the field called ‘OLD\_RSTK\_\_HELPURL1\_\_C’ is not mapped to anything on helpsetup\_\_c - it only exists as a reference.
    2. For ERP 19.14 or greater, Set ‘Help URL’ field on SYCONFIG to:
       1. https://rootstock.force.com/Trailblazer/
19. Add control records with baseline configuration data (Use populates.txt in SVN)
    1. Open Developer Console
    2. Copy and paste the populates.txt script
    3. Set authorizedUsers/paidUsers and shopfloorOnlyUsers field values based on SSO or Sales Order in the CRM org. This field will be increased later if RFS licenses were also purchased.
    4. Set password based on customer CRM record – Get Config Password button
       1. In the script, set the first occurrence of the syconfig\_password\_\_c field
       2. Leave the second occurrence as-is: Enter password here
    5. Tick the Open Log checkbox and Execute
    6. Verify the log shows success for Status
    7. Close out the log files
20. Add Mfg User record for rs-support user.
    1. ERP app
    2. Rootstock Site Map tab
    3. Manufacturing Users under the System Setup menu group
    4. Add a new RS user:
       1. Clock#: 1000
       2. Employee: Rootstock Support
          1. Note: If unable to enter a value (auto-complete not working) then try disabling this setting:
             1. Setup > Security Controls > Session Settings > Enable Content Sniffing protection
       3. Other Indicators tab: Tick the 3 Responsible Indicator fields
       4. Defaults for all other fields
       5. Save
21. If installation is for a partner then add Mfg User record for partner’s designated contact which can be found on the Customer/Partner Production Org record.
22. Edit syconfig record in order to set Financial System Interface field:
    1. Skip this step if installing RSF
    2. Rootstock Site Map tab
    3. Select ‘System Configuration’ menu option in the ‘RS Support Functions’ menu group
    4. Select Edit on SYCONFIG record
       1. Set password based on customer CRM record – Get Config Password button
       2. Select the appropriate Financial System Interface value (Get info from customer CRM record).
          1. Set to QuickBooks Desktop for Great Plains Accounting
          2. If unknown for internal and Channel Partner orgs, set to QuickBooks Desktop to avoid getting errors when creating cost transactions.
       3. If it errors out when setting to Rootstock then use Workbench to plug the value:
          1. Workbench URL: https://workbench.developerforce.com/login.php
          2. Set rstk\_\_syconfig\_financials\_\_c = Rootstock
          3. The password must be entered in Workbench. Do not bypass using triggers because the config\_\_c Custom Setting will not get updated.
       4. Save
23. Create a list view called ‘Is Valid = False’ on Apex Classes and compile all classes
    1. Setup > Develop > Apex Classes
    2. Create New View
       1. View Name: Is Valid = False
       2. Add filter where Is Valid equals false
       3. Add the ‘Is Valid’ field to the Selected Fields
       4. Enable ‘Visible to all users’
       5. Save
    3. Create New View if the default view no longer exists
       1. View Name: All
       2. Enable ‘Visible to all users’
       3. Save
24. Add API Usage email notification for production orgs only
    1. Setup > Monitoring > API Usage Notifications
    2. Add a new record ONLY if one does not already exist
       1. Notification Recipient: Set to Primary Contact on customer CRM record or Rootstock Support if unknown
       2. Threshold: 75%
       3. Notification Interval (Hours): 12
25. Verify the SF “Account Number” field on the Account object’s “Field-Level Security” is set to Visible for System Administrator and appropriate profiles. This change automatically sets “Field Accessibility”.
    1. Setup > Build > Customize > Accounts > Fields OR  
       Setup > App Setup > Customize > Accounts > Fields
    2. View Account Number field
    3. Set Field-Level Security button
    4. Tick Visible checkbox for System Administer profile and all profiles updated with permission during installation
    5. Save
26. This now done for all profiles in a previous step  
    ~~If using FFA, enable ‘View All’ permission on the SF Account record for all RS, RSF and RS/FF profiles~~

~~Object Settings~~

~~Accounts~~

~~Enable ‘View All’ in Object Permissions~~

1. If using FFA, add the Rootstock Support user as a FinancialForce licensed user. This must be done in the production org prior to creating the sandbox (resolves a FF Accounting Quickstart bug). (Rob)
   1. Setup > Installed Packages
   2. Search for the c2g Namespace Prefix (FinancialForce Accounting package)
   3. Select the Manage Licenses link
   4. Select Add Users button
   5. Select Rootstock Support user from Available Users and Add button
   6. Remove the FinancialForce user from the Selected Users list, if it exists
2. If using FFA, verify the following apps are installed. Create a FF case if needed and verify FFA login is available. (Rob)
   1. FinancialForce Reporting
   2. FinancialForce ClickLink
   3. FinancialForce.com - Document Field Mapping
   4. FinancialForce Accounting Billing Extension (not a separate package as of c2g rev 11)
   5. Journal Extension package must be separately installed for FFA v14 or greater (FF is no longer including it in v14 – disregard when 11539 is working )
   6. FinancialForce User:
      1. First Name: FinancialForce
      2. Last Name: Onboarding
      3. Email: [ffonboarding.logins@financialforce.com](mailto:ffonboarding.logins@financialforce.com)
      4. Username: [ffonboarding@<newCustomerName>.com](mailto:ffonboarding@%3cnewCustomerName%3e.com)
      5. Profile: System Administrator
3. If using FFA (and already installed), deploy non-packaged classes for FF interface
   1. Enable Apex Class Access for the deployed files on all RS/FF profiles
4. Run the Periodic Batch Processor scheduled job via Developer Console. This job runs every minute and processes any sydata\_\_c records that are queued up (like SO Entry records).
   1. “rstk.PeriodicBatchProcessor.run();
   2. Close all log files
   3. Exit Console
5. Create (if not already there) this ‘rstk’ Custom Setting:
   1. For production use the same value in the sandbox (which may have changed during the sandbox pilot)
   2. Name: salesorder\_maxEditableLines
   3. Value: 8
   4. Description: This value determines the max number of lines that can be added using the normal Sales Order UI
6. Replace all email template contents with dev-qa-ff version (Folder – Email Template Name). Note: may need to click on the “Edit Template” several times in order for edit mode to work.
   1. Bill Of Lading - Bill Of Lading - MASTER - DO NOT MODIFY
   2. Credit Memo - CreditMemoTemplate - MASTER - DO NOT MODIFY
   3. Invoice – SOInvoiceTemplate - MASTER - DO NOT MODIFY
   4. Invoice - SOInvoiceTemplateBatch - MASTER - DO NOT MODIFY
   5. POPrintTemplates – POPrintTemplate - MASTER - DO NOT MODIFY
   6. Packing Slip - Packing Slip - MASTER - DO NOT MODIFY
   7. RMA Templates - RMA Template - MASTER - DO NOT MODIFY
   8. SOPickList - MASTER - DO NOT MODIFY
   9. SOAckTemplates - Sales Order Acknowledgement - MASTER - DO NOT MODIFY
   10. SOQuoteTemplates - Quote Template - MASTER - DO NOT MODIFY
7. Check the SSO and configure RootScan if applicable
8. Ensure Email Deliverability Access Level is set to All Email
   1. Quick Find: Deliverability
   2. If Access Level is editable then set to All Email
   3. If Access Level is disabled then add a SF case to enable the field and set to All Email once the case is resolved – see case 23126863
9. Update customer record on CRM org with org ID, profile info, release number, date, etc…
10. ~~Log your actual time (not elapsed) on the CRM org as billable hours (do not log time for partners)~~