1. Provide info to Adrian Lopez via email or ticket - alopez@rootstock.com
   1. Org ID
   2. Number of licenses per type
   3. Customer or Partner name. If Rootstock org then provide org name.
      1. Trial = "Trial" are existing Rootstock Customers that want to try RootScan but there is no commitment yet. Organization Code will expire in 14 days.
      2. Partner = Organization Code will expire in 3 months - It can be set to auto-renew.
      3. Customer = Organization Code will expire based on the contract.
2. Verify RootScan app is enabled for RS profiles (CHECK FOR ALL ORGS):
   1. Setup > Create > Apps – Edit RootScan app and set the Visible field for all RS related profiles and System Administrator
   2. Check all RS related profiles and verify the Tab settings are set to ‘Default On’ for the following tabs:
      1. Mobile Devices
      2. User Mobile Profiles
      3. Mobile Label Templates
3. Update user license on syconfig\_\_c. The product on the SSO will indicate if the license is for Standard Users or Shop Floor users. If the product is not clear then add the license to Authorized Mobile Standard Users. (SSO’s are not created for trials)
   1. Set both fields to 10 for a “customer” trial app unless instructed otherwise
   2. For partners, set Standard Users to 1 – do not provision more than 1 license for partners
   3. Authorized Mobile Standard Users
   4. Authorized Mobile Shop Floor Users
4. Update the Production/Sandbox CRM record and set RootScan Active to true.
5. Send an email to customer with these details:

The RootScan app is now enabled in your (be specific) org for xx Standard users and xx Shop Floor users.  
The RootScan app (14 day trial version) is now enabled in your (be specific) org for xx Standard users and xx Shop Floor users.  
Some configuration is required before using your mobile device. The following links will guide you through the configuration. Work through these documents in the order listed.

[User Guide - How to install RootScan?](https://docs.google.com/document/d/1ZusRVbzMZkIGu3dVy-m6PV7fGhacV9QEjcTZRaK1mCA/edit?usp=sharing)

[User Guide - Enable Mobile Access to a Manufacturing User](https://docs.google.com/a/uniqueitconsulting.net/document/d/1ijQYFdYg8cstc6Rn0vsAP0om8TbkcEyh0KS5uQRUk5M/edit?usp=sharing)

[User Guide - Mobile Device](https://docs.google.com/document/d/1SRj1fjObufxitv0Ko6zx_GCkADODsN1DXMOvsgUxd0c/edit?usp=sharing)

[User Guide - User Mobile Profile](https://docs.google.com/a/uniqueitconsulting.net/document/d/1XMVJMuUVqAXpQjVBqFdp-DJv75ygTXqaZO-xOUWRCbU/edit?usp=sharing)

[User Guide - Mobile Label Template](https://docs.google.com/document/d/1OztRWH9bPiJ0rVSjtWCWuoCNMxMjzMJLm8JpUSDdWDg/edit?usp=sharing)

Note: Use Salesforce Classic UI to configure the app. Salesforce Lightning UI is currently not supported.  
   
Please create a new Support case if you have any questions or need assistance.