Requires ERP 17.21.3 or greater in order to avoid the unrelated SO data integrity issue on 16980 and the Insufficient Privileges issues.

1. Create Salesforce Connected App
   1. Setup > Create > Apps
   2. Under **Connected Apps**, click on **New**
   3. App Information
      1. **Basic Information**
         1. Connected App Name RootScan App
         2. API Name rscan
         3. Contact Email [support@rootscan.net](mailto:support@rootscan.net)
         4. Contact Phone 888-524-0123
         5. Logo Image URL Dynamic (RS Provide) **\*\*Optional**
         6. Icon URL Dynamic (RS Provide) **\*\*Optional**
         7. Description Mobile App for Rootstock ERP
      2. **API (Enable OAuth Settings)**
         1. Enable OAuth Settings TRUE
         2. Callback URL rootscan1://success
         3. Selected OAuth Scopes Full Access (full)
         4. Require Secret for Web Server Flow TRUE
      3. **IP Relaxation Setting**
         1. IP Relaxation **Relax IP restrictions**
2. Select Continue
3. Make a note of these values :
   1. Consumer Key
   2. Consumer Secret
4. Assign Connect App to Profiles
   1. Setup > Manage Users > Profiles
   2. View **System Administrator and all full access RS/RSF profiles**
   3. Click on **Assigned Connected Apps or Connected App Access**
   4. Click on Edit
   5. Choose **RootScan App** from the Left Table and move it to the Right Table (may take up to 10 minutes for RootScan app to display)
      1. If error ‘Standard tabsets are not permitted for this profile’ occurs then disable Rebates apps and make the necessary object permission changes in order to same changes.
      2. See known SF issue:
         1. https://help.salesforce.com/articleView?id=000186561&type=1
   6. Save
5. Allow Profile to Read Objects.
   1. Setup > Manage Users > Profiles
   2. Choose a profile (**System Administrator**) and open it.
   3. Open Objects – Verify permissions are set for Administrator and full access ERP profiles
      1. User Mobile Devices Read/Create/Edit/Delete/View All/Modify All
      2. User Mobile Profiles Read/Create/Edit/Delete/View All/Modify All
      3. Mobile Devices Read/Create/Edit/Delete/View All/Modify All
      4. Mobile Label Templates Read/Create/Edit/Delete/View All/Modify All
6. Update user license on syconfig\_\_c. The product on the SF order (or SSO) should 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.
   1. Authorized Mobile Standard Users
   2. Authorized Mobile Shop Floor Users
7. Provide info to Adrian Lopez via email or ticket - alopez@rootstock.com
   1. Org ID
   2. UITC Consumer Key
   3. Secret Key
   4. 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.
8. Adrian will provide to Rootstock the Organization Code - One per Salesforce Org. This code is used by the customer when logging into RootScan via a mobile device.
9. Update the customer, partner, or RS Org record with the Organization Code and set RootScan Active to true.
10. Add a public comment to ticket:

The RootScan app is now enabled in your (be specific) org for xx Standard users and xx Shop Floor users.  
The RootScan app (2 week 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)

Your Organization Code is xxxx. Use this code when logging into RootScan on your mobile device.

Please create a new ticket if you have any questions or need assistance.