Compatibility Considerations

1. The ERP package must be installed prior to installing Financials – See ‘Rootstock ERP Package Installation Process’ document
2. The Financials package will always require a newer version of ERP due to dependencies between the two packages. The required ERP version is equal to or greater than the ERP version in pde4f.
3. See ticket 20000 for available and required RSF/ERP builds.

Installation Steps

1. Create profiles that will have full access to ERP and Financials
   1. Clone “RS Standard User - Full Access” and name it “RSF Standard User - Full Access”
   2. Edit properties and set description to:  
      Contains full access to both Rootstock ERP and Rootstock Financials.   
      Do not modify this profile. If changes are necessary then clone the profile and preface the name with RSF.
   3. Clone “RS Standard Platform User - Full Access” and name it “RSF Standard Platform User - Full Access”
   4. Edit properties and set description to:  
      Contains full access to both Rootstock ERP and Rootstock Financials.   
      Do not modify this profile. If changes are necessary then clone the profile and preface the name with RSF.
2. Clone existing custom profiles based on customer requirements. THIS NEEDS TO BE DONE IN THE ERP INSTALL IN ORDER TO GET ERP PERMISSIONS.   
   If customers who already have ERP ask us to provide RSF profiles to a new custom profile that does not have ERP permissions then we’ll need to use Snapshot to manually deploy the permissions.
3. IF IN DOUBT ABOUT THE PROFILES, CONTINUE WITH THE INSTALLATION AND ADD A COMMENT TO THE TICKET ASKING FOR A REVIEW.
4. Install Financials package using the correct build URL:
   1. Install latest available RSF version based on ticket 20000 or use specific build if requested. Installation URL is in the ‘Manual Steps Doc’ for the current quarterly release or from PDE4F. Replace ‘login’ with ‘test’ if installing in a sandbox.
   2. Select ‘Install for Specific Profiles...’ option and apply Financials permissions to both RS and RSF profiles:
      1. Select ‘RSF Full Access Users ‘ access level for the following:
         1. RS Standard Platform User - Full Access
         2. RS Standard User - Full Access
         3. Any existing RS customer profiles
         4. RSF Standard Platform User - Full Access
         5. RSF Standard User - Full Access
         6. And any other existing customer RSF profiles needing access to Financials based on customer requirements.
   3. Select Install
   4. An email will be sent when the installation completes (about 20 minutes)
5. Once the installation is complete, remove Apex Class Access and Visualforce Page Access for rstkf files from all RS profiles (ERP-only) modified above.
   1. This must be done using the appropriate UI.
      1. ~~Setup > Customize > User Interface~~
      2. As of SF Spring 18, this option is under Setup > Manage Users > User Management Settings
      3. Enable this setting: Enhanced Profile User Interface
      4. This is required because the other UI does NOT display all the components.
   2. The end result is all RS profiles have RSF object/FLS permissions (and no access to Classes/Pages). This is needed for ERP programs that reference RSF objects. Removing the Class/Page permissions prevents ERP-only users from accessing RSF programs.
6. Edit the RSF profiles and verify ALL Apex Class & Visualforce Page Access files are enabled. Several files end up not enabled on every installation – may be a SF bug.
7. After making the changes above set the ‘Enhanced Profile User Interface’ value back to its original value.
8. Edit all RSF Profiles and set the following:
   1. Custom App Settings
      1. Enable “Rootstock Financials”
9. For all RS/RSF profiles:
   1. Verify the ‘Run Reports’ permission is enabled
10. Compile all classes
11. 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 name or initials in the Description field
12. Verify the SF “Account Number” field on the Account object’s “Field-Level Security” is set to Visible for all RSF profiles & System Administrator. 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
13. Edit syconfig record in order to set Financial System Interface and Authorized Financial Users:
    1. Rootstock Site Map tab
    2. Select ‘System Configuration’ menu option in the ‘RS Support Functions’ menu group
    3. Select Edit on SYCONFIG record
       1. Set password based on customer CRM record – Get Config Password button
       2. Set Financial System Interface to Rootstock
       3. Set ‘Authorized Financial Users’ based on the ‘Rootstock Financial Apps’ value in the SSO. These licenses are NOT included in the ‘Number of Authorized Users’ and ‘Number of Paid User Licenses’ fields.
       4. If in doubt set to 0 and place a comment on the ticket asking for clarification.
       5. ~~Note: Verify rstk\_\_syconfig\_quickbooks\_\_c = false. (not necessary after ticket 19061 is packaged)~~
          1. ~~Use Workbench to make the change.~~
          2. ~~The password must be entered in Workbench. Do not bypass using triggers because the config\_\_c Custom Setting will not get updated.~~
14. Import Financials menu records using the Salesforce Data Loader
    1. Be sure to use the correct CSV file based on the Financials version being installed. Major release versions are in SVN.
    2. If installing an interim release be sure to run any menu scripts for subsequent releases.
    3. See ‘Rootstock ERP Package Installation Process’ document for details on using Data Loader
    4. Verify the site map displays the RSF menu items
15. Install "S-Docs" package from the Salesforce AppExchange on to your Salesforce org
    1. Setup > App Setup > AppExchange Marketplace OR  
       Setup > Build > AppExchange Marketplace
    2. Search for Sdocs and select ‘Get It Now’
    3. If installing on a sandbox:
       1. Login to the customer production org
       2. Search for Sdocs on the AppExchange and select ‘Get It Now’
       3. Select Login and Get It Now
       4. Select the Sandbox option
       5. Enter your sandbox credentials when prompted
    4. Select ‘Install for Specific Profiles...’ option and apply Financials permissions to profiles:
       1. Select ‘Full Access ‘ access level for the following:
          1. RSF Standard Platform User - Full Access
          2. RSF Standard User - Full Access
          3. And any other existing customer profiles needing access to Financials based on customer requirements
    5. Select Install
    6. An email will be sent when the installation completes (about 10 minutes)
    7. The S-Docs package must be configured – See ‘S-Docs - RS Check Template Steps’ document.
       1. Note: If there is a delay in opening the document with a message ‘connecting to printer’, then press ESC key to continue.
    8. Perform configuration of S-Docs package till ‘Step 4’ according to document mentioned above.
16. Disable ‘Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments’
    1. ONLY IF THIS IS A NEW ORG OR A CUSTOMER NEW TO SALESFORCE
    2. Customize > Salesforce Files > Settings > General Settings
    3. Ref: ticket 18159
17. Ensure all classes are compiled
18. Update customer record on CRM org with org ID, profile info, release number, date, etc…
19. Log your actual time (not elapsed) on the CRM org as billable hours (do not log time for partners)

Steps to create a Financials user record (if needed):

1. Update Mfg User Record
   1. Set Division, Company, User's Organizational Department, Multi-Company, Multi-Division, Labor Ohd, Fringe Ohd
2. Add Financial System User record
   1. Set Manufacturing User and leave other fields blank for now
3. Add Financial Company Master
   1. Set Company to ERP company – leave other fields blank for now