Zero Managed Package Details

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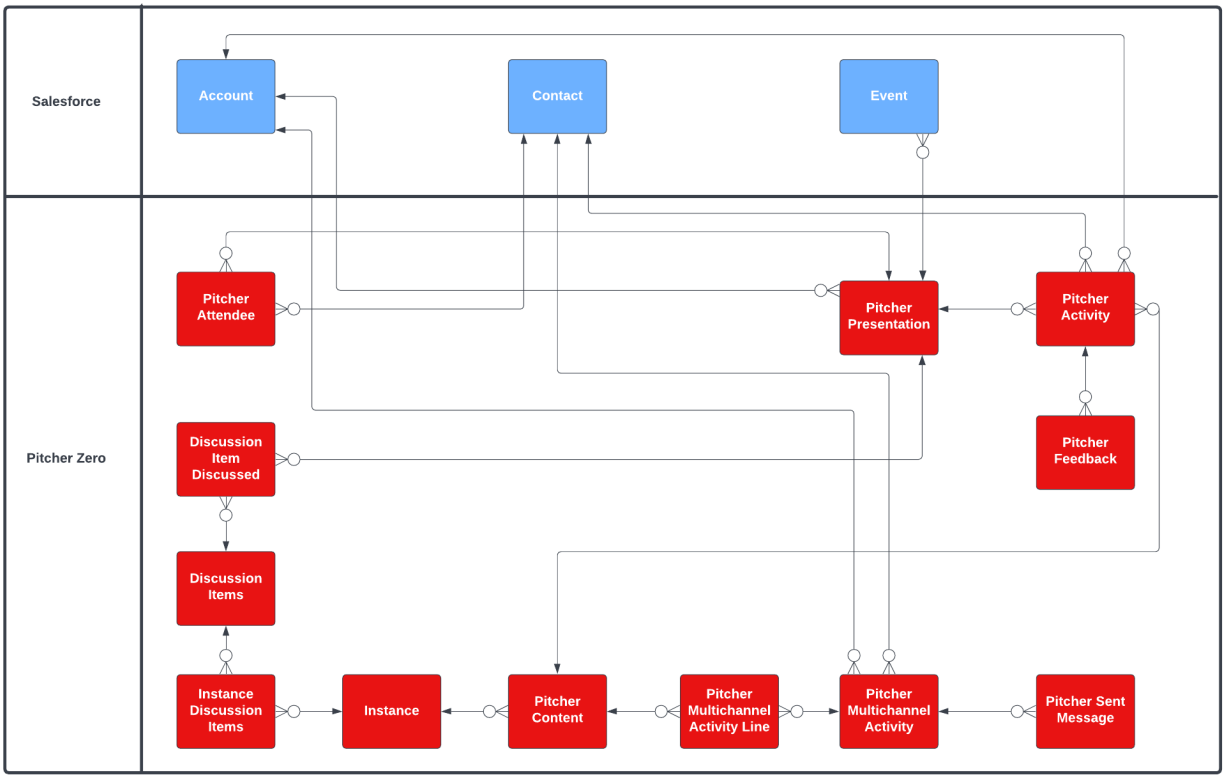
Zero Managed Package is a base package for Salesforce that allows you to sync foundational data like - users, accounts, permissions sets, instances, etc for Pitcher Applications use.

This document describes the contents and configuration of the latest Pitcher Zero Managed Package.

- Data Model
- Package Components
    - Custom Objects
        - Instance
        - Discussion Item Discussed
        - Pitcher Sent Message
        - Pitcher Feedback
        - Discussion Item
        - Pitcher Presentation
        - Instance Discussion Item
        - Pitcher Attendee
        - Pitcher Multichannel Activity Line
        - Pitcher Activity
        - Pitcher Multichannel Activity
        - Pitcher Content
        - Pitcher Synch Error
        - Pitcher Synch Activity Tracking
    - Custom Fields
        - Account
        - Contact
        - Activity
        - User
    - Custom Settings
    - Lightning App
    - Custom Tabs
    - Apex Classes
    - Apex Triggers
    - Permission Sets
- High-Level Functional Integration
    - PostCall Event
    - PostCall Pitcher Presentation
    - PostCall Pitcher Presentation Related
    - Multichannel Activity
- Package Installation
- Version Control

1 Data Model

This is a high-level data model of `Pitcher Zero` Managed Package for Salesforce.



2 Package Components

A Package Component is a basic building block of development. Check this Salesforce Package-able Components Documentation for different supported components which can be packaged.

2.1 Custom Objects

Pitcher Zero Managed Package installs the following custom objects listed below:

- Instance
- Discussion Item Discussed
- Pitcher Sent Message
- Pitcher Feedback
- Discussion Item
- Pitcher Presentation
- Instance Discussion Item
- Pitcher Attendee
- Pitcher Multichannel Activity Line
- Pitcher Activity
- Pitcher Multichannel Activity
- Pitcher Content
- Pitcher Synch Error
- Pitcher Synch Activity Tracking

2.1.1 Instance

The Instance (`PITCHER__Instance__c`) object contains the instance details related to where the Pitcher Content is allocated.

Fields and Relationship

Field Label	Field Name	Data Type
Created By	`CreatedById`	Lookup(User)
ID	`PITCHER__ID__c`	Number(18, 0)
Instance Name	`Name`	Auto Number
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)
Title	`PITCHER__Title__c`	Text(255)

Resources

Component Name	Component Type
Instance Layout	Page Layout

2.1.2 Discussion Item Discussed

The Discussion Item Discussed (`PITCHER__Discussion_Item_Discussed__c`) object allows in defining the link between Pitcher Presentation and Discussion Item.

Fields and Relationship

Field Label	Field Name	Data Type
Created By	`CreatedById`	Lookup(User)
Discussion Item	`PITCHER__Discussion_Item__c`	Master-Detail(Discussion Item)
Discussion Item Discussed Name	`Name`	Auto Number
Last Modified By	`LastModifiedById`	Lookup(User)
Order	`PITCHER__Order__c`	Number(18, 0)
Pitcher Presentation	`PITCHER__Pitcher_Presentation__c`	Master-Detail(Pitcher Presentation)
Reaction	`PITCHER__Reaction__c`	Picklist

Resources

Component Name	Component Type
Discussion Item Discussed Layout	Page Layout

2.1.3 Pitcher Sent Message

The Pitcher Sent Message (`PITCHER__Sent_Message__c`) allows you to define the Sent Email template.

Fields and Relationship

Field Label	Field Name	Data Type
Account	`PITCHER__Account__c`	Lookup(Account)

Field Label	Field Name	Data Type
Channel	`PITCHER__Channel__c`	Picklist
Clicked Date	`PITCHER__Clicked_Date__c`	Date/Time
Contact	`PITCHER__Contact__c`	Lookup(Contact)
Created By	`CreatedById`	Lookup(User)
Delivered Date	`PITCHER__Delivered_Date__c`	Date/Time
External ID	`PITCHER__External_ID__c`	Text(255) (External ID) (Unique Case Insensitive)
Last Modified By	`LastModifiedById`	Lookup(User)
Message	`PITCHER__Message__c`	Long Text Area(131072)
Owner	`PITCHER__Owner__c`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)
Sent Date	`PITCHER__Sent_Date__c`	Date/Time
Sent Message Name	`Name`	Auto Number
Status	`PITCHER__Status__c`	Picklist
Template	`PITCHER__Template__c`	Text(255)
Last Status	`PITCHER__Last_Status__c`	Formula (Text)
Read Date	`PITCHER__Read_Date__c`	Date/Time
Failed Date	`PITCHER__Failed_Date__c`	Date/Time
Failed Reason	`PITCHER_Failed_Reason__c`	Text (255)

Resources

Component Name	Component Type
Pitcher Sent Message Layout	Page Layout

2.1.4 Pitcher Feedback

The Pitcher Feedback (`PITCHER__Pitcher_Feedback__c`) object allows you to store the feedback received for content or slide.

Fields and Relationship

Field Label	Field Name	Data Type
Created By	`CreatedById`	Lookup(User)
Feedback	`PITCHER__Feedback__c`	Text(255)
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)
Page	`PITCHER__Page__c`	Number(5, 0)
Page Title	`PITCHER__Page_Title__c`	Text(255)
Pitcher Activity	`PITCHER__Pitcher_Activity__c`	Lookup(Pitcher Activity)
Pitcher Feedback Name	`Name`	Auto Number

Resources

Component Name	Component Type
Pitcher Feedback Layout	Page Layout

2.1.5 Discussion Item

The Discussion Item (`PITCHER__Discussion_Item__c`) object allows you to define a list of possible topics to be tagged inside content.

Fields and Relationship

Field Label	Field Name	Data Type
Created By	`CreatedById`	Lookup(User)
DI Target Object	`PITCHER__DI_Target_Object__c`	Picklist
DI Target Value	`PITCHER__DI_Target_Value__c`	Picklist
Discussion Item Name	`Name`	Text(80)
Last Modified By	`LastModifiedById`	Lookup(User)
Original Type	`PITCHER__Original_Type__c`	Text(255)
Owner	`OwnerId`	Lookup(User,Group)
Parent Discussion Item	`PITCHER__Parent_Discussion_Item__c`	Lookup(Discussion Item)

Resources

Component Name	Component Type
Discussion Item Layout	Page Layout

2.1.6 Pitcher Presentation

The Pitcher Presentation (`PITCHER__Pitcher_Presentation__c`) object is a master object that allows to define and link child objects. One presentation represents a call submitted.

Fields and Relationship

Field Label	Field Name	Data Type
Account	`PITCHER__PIT_Account__c`	Lookup(Account)
Created By	`CreatedById`	Lookup(User)
ExternalID	`PITCHER__ExternalID__c`	Text(255) (External ID)
Last Modified By	`LastModifiedById`	Lookup(User)

Field Label	Field Name	Data Type
Live! Meeting	`PITCHER__Live_Meeting__c`	Checkbox
Owner	`OwnerId`	Lookup(User,Group)
Pitcher Presentation Name	`Name`	Text(80)
Post Call Notes	`Post_Call_Notes__c`	Text Area
Pre Call Notes	`Pre_Call_Notes__c`	Text Area
Presentation Date	`PITCHER__Presentation_Date__c`	Date/Time
Presentation End Date	`PITCHER__Presentation_End_Date__c`	Date/Time

Resources

Component Name	Component Type
Pitcher Presentation Layout	Page Layout

2.1.7 Instance Discussion Item

The Instance Discussion Item (`PITCHER__Instance_Discussion_Items__c`) object allows you to define discussion Items to be synched to each Instance.

Fields and Relationship

Field Label	Field Name	Data Type
All Instances	`PITCHER__All_Instances__c`	Checkbox
Created By	`CreatedById`	Lookup(User)
Discussion Item	`PITCHER__Discussion_Item__c`	Lookup(Discussion Item)
Instance	`PITCHER__Instance__c`	Lookup(Instance)
Instance Discussion Items Name	`Name`	Auto Number

Field Label	Field Name	Data Type
Instance Name	`PITCHER__Instance_Name__c`	Formula (Text)
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)

Resources

Component Name	Component Type
Instance Discussion Item Layout	Page Layout

2.1.8 Pitcher Attendee

The Pitcher Attendee (`PITCHER__Pitcher_Attendee__c`) object allows you to define and list contacts who attended a Pitcher Presentation.

Fields and Relationship

Field Label	Field Name	Data Type
Contact	`PITCHER__Contact__c`	Lookup(Contact)
Created By	`CreatedById`	Lookup(User)
Last Modified By	`LastModifiedById`	Lookup(User)
PA Code	`Name`	Auto Number
Pitcher Presentation	`PITCHER__Pitcher_Presentation__c`	Master-Detail(Pitcher Presentation)
User	`PITCHER__User__c`	Lookup(User)

Resources

Component Name	Component Type
Pitcher Attendee Layout	Page Layout

2.1.9 Pitcher Multichannel Activity Line

The Pitcher Multichannel Activity Line (`PITCHER__Multichannel_Activity_Line__c`) object allows you to define content that is shared or accessed during a multichannel interaction.

Fields and Relationship

Field Label	Field Name	Data Type
Account	`PITCHER__Account__c`	Lookup(Account)
Answer	`PITCHER__Answer__c`	Long Text Area(131072)
Contact	`PITCHER__Contact__c`	Lookup(Contact)
Created By	`CreatedById`	Lookup(User)
Last Modified By	`LastModifiedById`	Lookup(User)
Multichannel Activity	`PITCHER__Multichannel_Activity__c`	Master-Detail(Pitcher Multichannel Activity)
Multichannel Activity Line Name	`Name`	Auto Number
Multichannel Activity Time	`PITCHER__Multichannel_Activity_Time__c`	Formula (Date/Time)
Multichannel Activity Type	`PITCHER__Multichannel_Activity_Type__c`	Formula (Text)
Pitcher Content	`PITCHER__Pitcher_Content__c`	Lookup(Pitcher Content)
Question	`PITCHER__Question__c`	Long Text Area(131072)

Resources

Component Name	Component Type
Pitcher Multichannel Activity Line Layout	Page Layout

2.1.10 Pitcher Activity

The Pitcher Activity (`PITCHER__Pitcher_Activity__c`) object allows you to define content presented or shared during Pitcher Presentation.

Fields and Relationship

Field Label	Field Name	Data Type
Account	PITCHER__Account__c	Lookup(Account)
Activity Time	PITCHER__Activity_Time__c	Date/Time
Answer	`PITCHER__Answer__c`	Text(255)
Contact	`PITCHER__Contact__c`	Lookup(Contact)
Created By	`CreatedById`	Lookup(User)
Download Time	`PITCHER__Download_Time__c`	Date/Time
Duration	`PITCHER__Duration__c`	Number(18, 0)
Last Modified By	`LastModifiedById`	Lookup(User)
Lead	`PITCHER__Lead__c`	Lookup(Lead)
Left Behind	`PITCHER__Left_Behind__c`	Checkbox
Link Click Time	`PITCHER__Link_Click_Time__c`	Date/Time
Pitcher Activity Name	`Name`	Auto Number
Pitcher Presentation	`PITCHER__Pitcher_Presentation__c`	Master-Detail(Pitcher Presentation)
Question	`PITCHER__Question__c`	Text(255)
Reaction	`PITCHER__Reaction__c`	Picklist
Survey Name	`PITCHER__Survey_Name__c`	Text(255)

Field Label	Field Name	Data Type
Used Content	`PITCHER__Used_Content__c`	Lookup(Pitcher Content)
Used Content Name	`PITCHER__Used_Content_Name__c`	Formula (Text)
Viewed	`PITCHER__Viewed__c`	Checkbox

Resources

Component Name	Component Type
Pitcher Activity Layout	Page Layout

2.1.11 Pitcher Multichannel Activity

The Pitcher Multichannel Activity (`PITCHER__Multichannel_Activity__c`) object allows you to define and store multichannel interactions through different channels like Message Sent, Content Shared, Content Accessed, or Survey Completed.

Fields and Relationship

Field Label	Field Name	Data Type
Account	`PITCHER__Account__c`	Lookup(Account)
Activity Channel	`PITCHER__Channel__c`	Text(255)
Activity Time	`PITCHER__Activity_Time__c`	Date/Time
Contact	`PITCHER__Contact__c`	Lookup(Contact)
Created By	`CreatedById`	Lookup(User)
Customer Channel	`PITCHER__Customer_Channel__c`	Picklist
Details	`PITCHER__Details__c`	Long Text Area(131072)
Last Modified By	`LastModifiedById`	Lookup(User)

Field Label	Field Name	Data Type
Meeting Id	`PITCHER__Meeting_Id__c`	Text(255) (External ID) (Unique Case Insensitive)
Multichannel Activity Name	`Name`	Auto Number
Multichannel Activity Type	`PITCHER__Multichannel_Activity_Type__c`	Picklist
Owner	`PITCHER__Owner__c`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)
Pitcher Content	`PITCHER__Pitcher_Content__c`	Lookup(Pitcher Content)
Pitcher Sent Message	`PITCHER__Pitcher_Sent_Message__c`	Lookup(Pitcher Sent Message)
Session Id	`PITCHER__Session_Id__c`	Text(50) (External ID)

Resources

Component Name	Component Type
Pitcher Multichannel Activity Layout	Page Layout

2.1.12 Pitcher Content

The Pitcher Content (`PITCHER__Pitcher_Content__c`) object allows you to define and store all the content available inside the Pitcher Instance.

Fields and Relationship

Field Label	Field Name	Data Type
Category	`PITCHER__Category__c`	Text(255)
Content Name	`Name`	Text(80)
Content Type	`PITCHER__Content_Type__c`	Text(255)

Field Label	Field Name	Data Type
Created By	`CreatedById`	Lookup(User)
Duration (Minutes)	`PITCHER__Duration__c`	Number(18, 0)
Expire Date	`PITCHER__Expire_Date__c`	Date/Time
File Size	`PITCHER__File_Size__c`	Number(18, 0)
FileID	`PITCHER__FileID__c`	Text(255) (External ID) (Unique Case Insensitive)
Full Name	`PITCHER__Full_Name__c`	Text(255)
Instance	`PITCHER__Instance__c`	Lookup(Instance)
Keywords	`PITCHER__Keywords__c`	Long Text Area(131072)
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	`OwnerId`	Lookup(User,Group)
Subcategory	`PITCHER__Subcategory__c`	Text(255)
Uploaded By	`PITCHER__Uploaded_By__c`	Text(255)

Resources

Component Name	Component Type
Pitcher Content Layout	Page Layout

2.1.13 Pitcher Synch Error

The Pitcher Synch Error (`PITCHER__Pitcher_Synch_Error__c`) object allows you to track synchronization errors.

Fields and Relationship

Field Label	Field Name	Data Type
Name	Name	Autonumber
Created By	`CreatedById`	Lookup(User)
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	OwnerId	Lookup (User)
Type	PITCHER__Type__c	Picklist
Status	PITCHER__Status__c	Picklist
Version	PITCHER__Version__c	Text (80)
Instance Name	PITCHER__Instance_Name__c	Text (80)
Device name	PITCHER__Device_Name__c	Text (80)
Device udid	PITCHER__Device_UDID__c	Text(80) (External ID) (Unique Case Insensitive)
Error Date	PITCHER__Error_Date__c	Date/Time
Last Seen Date	PITCHER__Last_Seen_Date__c	Date/Time
Synch Attends	PITCHER__Synch_Attends__c	Number (18,0)
Mobile Id	PITCHER__Mobile_ID__c	Text(80) (External ID) (Unique Case Insensitive)
Event Name	PITCHER__Event_Name__c	Text (80)
Event Parameters	PITCHER__Event_Parameters__c	Text Long (131,072)
Event Extra	PITCHER__Event_Extra__c	Text Long (131,072)
Error Message	PITCHER__Error_Message__c	Text Long (131,072)

Resources

Component Name	Component Type
Pitcher Synch Error Layout	Page Layout

2.1.14 Pitcher Synch Activity Tracking

The Pitcher Synch Activity Tracking (`PITCHER__Pitcher_Synch_Activity_Tracking__c`) object allows you to track synchronization activities.

Fields and Relationship

Field Label	Field Name	Data Type
Name	Name	Autonumber
Created By	`CreatedById`	Lookup(User)
Last Modified By	`LastModifiedById`	Lookup(User)
Owner	OwnerId	Lookup (User)
Synch Start	PITCHER__Synch_Start__c	Date/Time
Synch End	PITCHER__Synch_End__c	Date/Time
Duration	PITCHER__Duration__c	Number (18,0)
Synch Type	PITCHER__Synch_Type__c	Picklist
Version	PITCHER__Version__c	Text (80)
Device name	PITCHER__Device_Name__c	Text (80)
Device udid	PITCHER__Device_UDID__c	Text(80) (External ID) (Unique Case Insensitive)
Mobile Id	PITCHER__Mobile_ID__c	Text(80) (External ID) (Unique Case Insensitive)
Status	PITCHER__Status__c	Picklist

Resources

Component Name	Component Type
Pitcher Synch Activity Tracking Layout	Page Layout

2.2 Custom Fields

The Pitcher's Zero Managed Package extends many custom fields to the following standard SFDC objects as listed below:

2.2.1 Account

Fields

Field Label	Field Name	Data Type	Description
Best Day to Visit	`PITCHER__Best_Day_to_Visit__c`	Picklist (Multi-Select)	Best days of week to visit customer.
Best Time to Visit	`PITCHER__Best_Time_to_Visit__c`	Picklist (Multi-Select)	Best time to visit customer.
Billing Lat/Lon	`PITCHER__Billing_Lat_Lon__c`	Formula(Tex)	Geolocation of the account.
Bring to Pitcher	`PITCHER__Bring_to_Pitcher__c`	Checkbox	Determines if the account needs to be synced with Pitcher Connect.
Calls This Month	`PITCHER__Call_Target_This_Month__c`	Number (18,0)	Interactions executed inside actual month.
Calls This Quarter	`PITCHER__Call_Target_This_Quarter__c`	Number (18,0)	Interactions e xecuted inside actual quarter.
Calls This Week	`PITCHER__Call_Target_This_Week__c`	Number (18,0)	Interactions e xecuted inside actual week.

Field Label	Field Name	Data Type	Description
Calls This Year	PITCHER__Calls_This_Year__c	Number (18,0)	Interactions executed inside actual year.
Call Target This Month	PITCHER__Calls_This_Month__c	Number (18,0)	Interactions target inside actual month.
Call Target This Quarter	PITCHER__Calls_This_Quarter__c	Number (18,0)	Interactions target inside actual quarter.
Call Target This Week	PITCHER__Calls_This_Week__c	Number (18,0)	Interactions target inside actual week.
Call Target This Year	PITCHER__Call_Target_This_Year__c	Number (18,0)	Interactions target inside actual year.
Connect DnD Communications	PITCHER__Connect_DnD_Communications__c	Checkbox	Connect DnD information synced from Pitcher<-> SFDC
Enrolled Channels	PITCHER__Enrolled_Channels__c	Picklist (Multi-Select)	Channels used by customers inside Pitcher Connect.
Enrolled Code	PITCHER__Enrollment_Code__c	Text(255)	Customer Pitcher Connect code.
ExternalId	PITCHER__ExternalID__c	Text(255) (External ID) (Unique Case Insensitive)	External Id generated by Accounts that were created offline.
Pitcher Last Visit	PITCHER__Last_Visit__c	Date/Time	Date of last executed interaction.

Field Label	Field Name	Data Type	Description
Portal URL	`PITCHER__Portal_URL__c`	URL(255)	Customer Portal Connect URL.
Visit Fx Completion	`PITCHER__Visit_Fx_Completion__c`	Formula (Number)	Target vs Execution Interaction completion.

2.2.2 Contact

Fields

Field Label	Field Name	Data Type	Description
Bring to Pitcher	`PITCHER__Bring_to_Pitcher__c`	Checkbox	Checkbox used to Synch Account to Pitcher Connect
Connect DnD Communications	`PITCHER__Connect_DnD_Communications__c`	Checkbox	Connect DnD information syched from Pitcher<-> SFDC
Enrolled Channels	`PITCHER__Enrolled_Channels__c`	Picklist (Multi-Select)	Channels used by customer inside Pitcher Connect
Enrolled Code	`PITCHER__Enrollment_Code__c`	Text(255)	Customer Pitcher Connect code
ExternalId	`PITCHER__ExternalID__c`	Text(255) (External ID) (Unique Case Insensitive)	External Id generated by Accounts created offline
Pitcher External Id	`PITCHER__PIT_External_ID__c`	Text(255) (External ID) (Unique Case Insensitive)	Pitcher External Id

Field Label	Field Name	Data Type	Description
Portal URL	`PITCHER__Portal_URL__c`	URL(255)	Customer Portal Connect URL

2.2.3 Activity

Fields

Field Label	Field Name	Data Type	Description
Coaching Visit	`PITCHER__Coaching_Visit__c`	Checkbox	Checkbox to reflect Coaching Visit
Executed	`PITCHER__PIT_Executed__c`	Checkbox	Executed
Pitcher Call Type	`PITCHER__Call_Type__c`	Picklist	How Call has been created inside Pitcher: via Planning (Detailed), Planning (Quick), Quick Plan or Unplanned
Pitcher Content	`PITCHER__Pitcher_Content__c`	Lookup (Pitcher Content)	Field used inside Tasks to launch content
Pitcher External Id	`PITCHER__PIT_CalendarID__c`	Text(255) (External ID) (Unique Case Insensitive)	Pitcher External Id
Pitcher Presentation	`PITCHER__Pitcher_Presentation__c`	Lookup (Pitcher Presentation)	Lookup to Pitcher Presentation when call is executed
Pitcher Presentation Type	`PITCHER__Presentation_Type__c`	Picklist	Type of Interaction: In Person or Remote

2.2.4 User

Fields

Field Label	Field Name	Data Type	Description
Case Insensitive Profile Id	`PITCHER__Case_Insensitive_Profile_ID__c`	Formula (Text)	Formula to Profile Id
Connect Admin	`PITCHER__Connect_Admin__c`	Checkbox	Flag to skip territory/rule assigment inside Connect (visibility to all customers)
Pitcher Instance	`PITCHER__Instance__c`	Picklist (Multi-Select)	Assigment visibility of Instance in Pitcher Connect
Pitcher Last Sync	`PITCHER__Last_Sync__c`	Date/Time	Last Sych Time in Pitcher Impact
ProfileId	`PITCHER__PIT_Profile_ID__c`	Formula Text	Formula to Profile Id

2.3 Custom Settings

Custom settings are needed in order to allow to perform Pitcher Zero Push and generate Pitcher Zero cards. Pitcher custom settings need to be created in each org with the info provided by the Pitcher team.

Name	Type	Description
Additional Offline Objects	Text(255)	Offline Object to generate p0 cards
API Consumer Key	Text(40)	Customer Key to connect SFDC to Pitcher
API Consumer Secret	Text(40)	Customer Secret to connect SFDC to Pitcher
Instance	Number (6,0)	Customer Instance Id to push p0 cards

Name	Type	Description
Second System Admin Password + Token	Text(255)	SFDC Admin encripted password to run P0 push
Second System Admin Username	Text(255)	SFDC Admin username to run P0 push

2.4 Lightning App

In Lightning mode, Lightning Apps can be launched from App Launcher. These are combinations of multiple tabs.

Label	Developer Name	Description
PITCHER	`Pitcher_Zero_Lightning`	This app includes multiple tabs and some navigation configurations
PITCHER	`Pitcher_Zero`	This app includes multiple tabs and some navigation configurations

2.5 Custom Tabs

The following list reflects custom tabs available inside the Pitcher Zero package

Name	Type	Description
Pitcher Admin	Visualforce Tab	Pitcher Admin portal linked to customer instances
Pitcher Insight	Visualforce Tab	Pitcher Insight portal linked to logged used
Pitcher Zero	Visualforce Tab	Pitcher Zero Generator Portal

2.6 Apex Classes

Pitcher Zero Managed Package installs the following Apex Classes as listed below. These are used for proper application functionality on Pitcher platform general application usage.

- `MyMockHttpCallout`
- `MyMockHttpCalloutV2`
- `PIT_AccountCallScheduleBatch`
- `PIT_AccountCallsClear`

- `PIT_CounterHandler`
- `PIT_DiscussionItemPusher`
- `PIT_DiscussionItemPusherTest`
- `PIT_DiscussionItemPusherV2`
- `PIT_DiscussionItemPusherTestV2`
- `PIT_TestAccountCallsClear`
- `PIT_TestCounterHandler`
- `PIT_TestUpdatedObjectService`
- `PIT_UpdatedObjectService`
- `TestUpdatePitcherActivityViaWebToLead`

2.7 Apex Triggers

Pitcher Zero Managed Package installs the following Apex Triggers as listed below. These are used for proper application functionality on Pitcher platform general application usage.

Name	Object	Description
PIT_Counter	Pitcher Presentation	Trigger to count interaction executed in Pitcher and update Calls fields inside Account Object
`PIT_Push_DiscussionItem`	Discussion Item	Trigger to push Discusion Item to linked instances defined inside Pitcher Custom Settings
`PIT_Push_DiscussionItem`	Instance Discussion Items	Trigger to push Discusion Items to selected instance defined inside Pitcher Custom Settings
`removePitcherUpdateActivityLead`	Lead	Trigger to remove temporally Lead
`UpdatePitcherActivityViaWebToLead`	Lead	Trigger to generate Lead via Pitcher Form and capture download and click time via ZeroDrive

2.8 Permission Sets

Pitcher Zero Managed Package installs the following permission sets as listed below. These are used for proper access on Pitcher application usage.

- `PITCHER-Zero Admin` - This permission set is used for admin users that need to admin Pitcher Objects and generate P0 push.

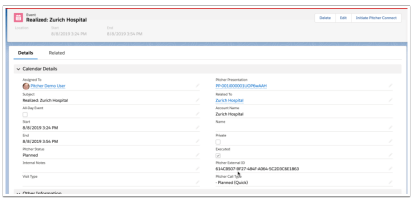
- `PITCHER-Zero Integration` - This permission set is used for integration user that needs to synch data between Pitcher Connect and SFDC.
- `PITCHER-Zero Rep` - This permission set is used for all users that work with Pitcher in the field.
- `PITCHER-Zero Rep - NonPlatform` - This permission set is used for all platform users that work with Pitcher in the field.

3 High-Level Functional Integration

The following section provides details on how records are generated using the Pitcher Zero managed objects.

3.1 PostCall Event

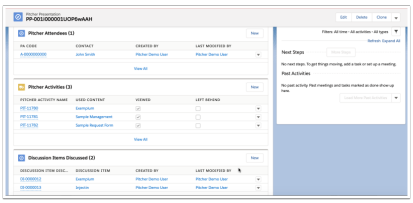
When a call is planned an event record is created without Pitcher Presentation that it is only generated during the submit process in Pitcher. The following image shows an example of Event Layout with Pitcher Presentation link:



1 Pitcher Presentation Link

3.2 PostCall Pitcher Presentation

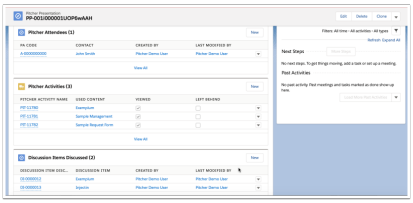
The following image shows an example of a Pitcher Presentation Layout:



2 Pitcher Presentation Layout

3.3 PostCall Pitcher Presentation Related

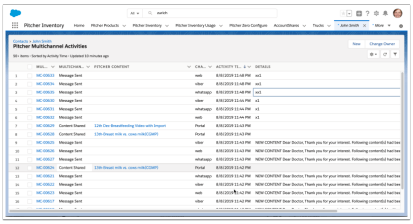
The following image shows an example of Pitcher Presentation Related Objects:



3 Pitcher Presentation Related Objects

3.4 Multichannel Activity

The following image shows an example of a Multichannel Activity:



4 Multichannel Activity

4 Package Installation

To learn how to install this package and the post-installation steps, see Danone - Installing the Zero Managed Package.

5 Version Control

Version (Download)	Installation/Upgrade Link	Data Updated	Release Notes
1.79	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001E4ha	12-Jul-22	New fields in Presentation: Pre Call Notes and Post Call Notes
1.78	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001E4Za	07-Jul-22	New objects: Synch Activity Tracking and Synch Error
1.77	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001UjhP	15-Jun-22	New field Session id in Pitcher Multichannel Activity Object
1.76	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001UjVm	26-May-22	New fields inside Pitcher Sent Message: Last status, Read Date
1.75	https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6S000001UjVD	29-Mar-22	Fix issue Delta synch in Windows

6 Installing the Zero Managed Package

- Pre Installation
  - Install the dependent package
- Installation
- Post Deployment
  - Step 1 - Add Pitcher Presentation Field to Events Layout
  - Step 2 - Configure Activity Settings
  - Step 3 - Add Permission Sets to Users
  - Step 4 - Create and Activate Pitcher Zero Admin Users
  - Step 5 - Configure Pitcher Zero Settings
  - Step 6 - Generate Encrypted Password
  - Step 7 - Generic Pitcher Zero Push
  - Step 8 - Download Pitcher Zero File
  - Step 9 - Schedule Apex Jobs
    - PITCHER.PIT_AccountCallScheduleBatch

6.1 Pre Installation

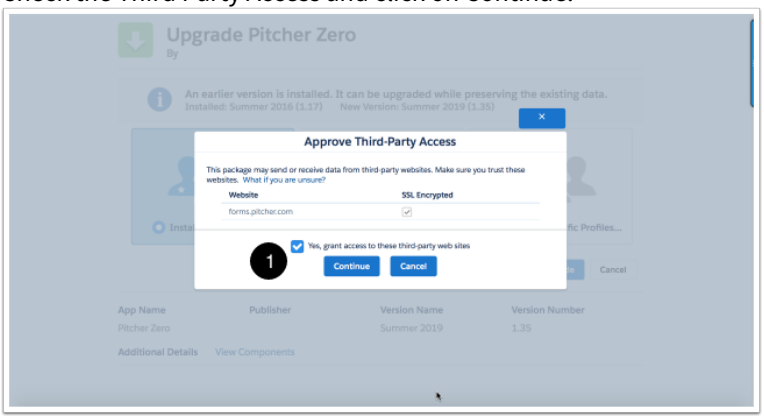
6.1.1 Install the dependent package

1. There is no dependent package(s) for Pitcher Zero. So no action here.

6.2 Installation

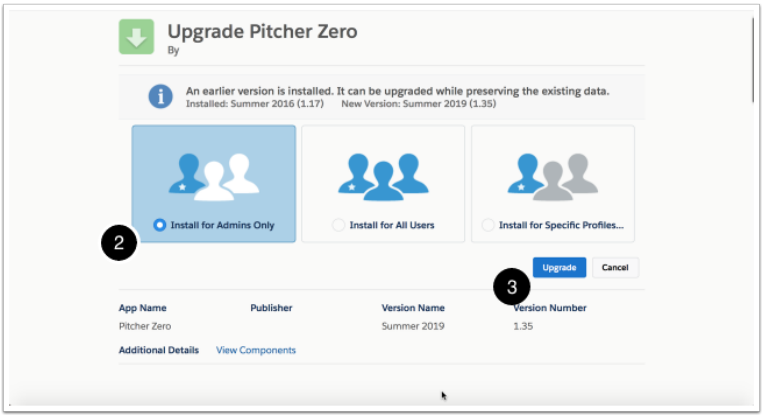
Let us go through the below steps to install or upgrade `Pitcher Zero` managed package in Salesforce.

1. Enter the following address in your browser: `https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5p000000258AAAQ` (This link is just an example. Use the respective installation link from https://pitcher-ag.atlassian.net/wiki/spaces/PDOC/pages/266732320/Zero+Managed+Package+Details#Version-Control section). This should redirect you to the login page of Salesforce.com. For Sandbox organizations, swap http://login.salesforce.com with http://test.salesforce.com in the URL.
2. Check the Third Party Access and click on Continue.



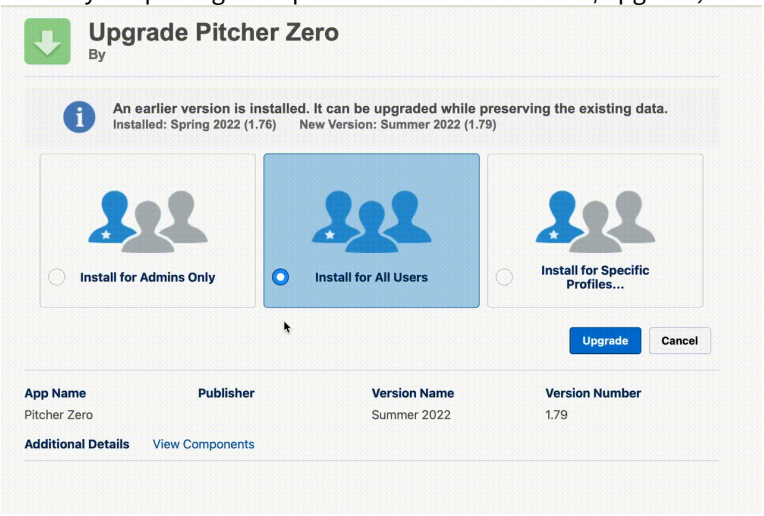
5 Approve Third-party Access

3. Select **Install for Admins Only** or **Install for All Users** or **Install for Specific Profiles** depending on the need.

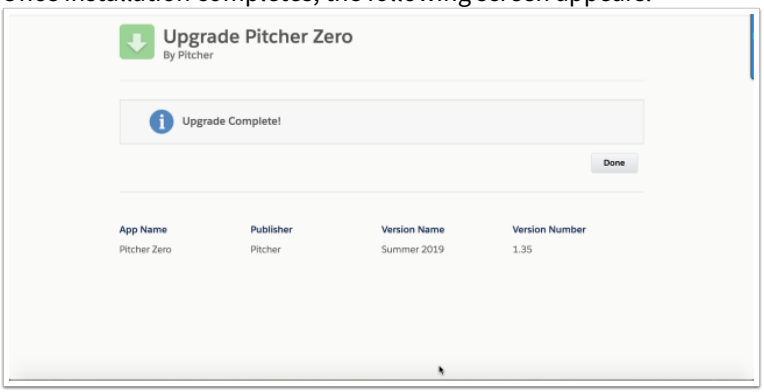


6 Pitcher Zero Installation

4. To verify the package components before installation/upgrade, click on the “View Components” link

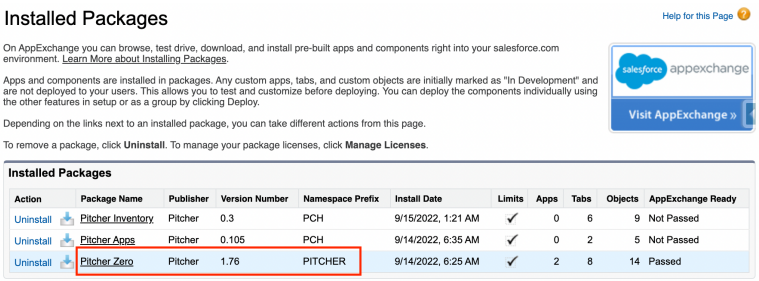


5. Check the acknowledgement and click **Install or Upgrade** to proceed.
6. Once installation completes, the following screen appears:

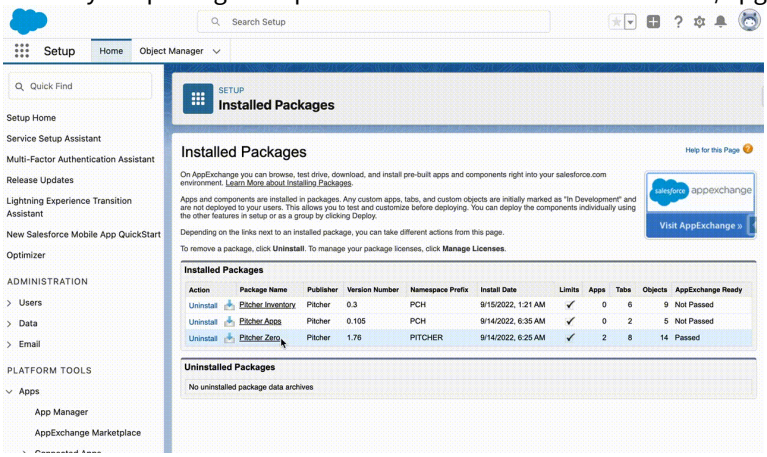


7 Complete Installation

7. To confirm the successful installation, check the installed packages, on the **Setup > Apps > Packaging > Installed Packages** page.



8. To verify the package components after a successful installation/upgrade, follow the steps shown below -



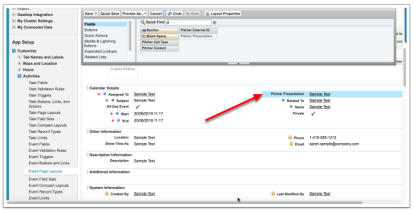
6.3 Post Deployment

Follow the following steps after installing the `Pitcher Zero` managed package.

6.3.1 Step 1 - Add Pitcher Presentation Field to Events Layout

1. Go to **Setup > Customize > Activities > Event Page Layouts**.
2. Select the **Event Layout** page layout and click **Edit**.
3. Add the **Pitcher Presentation** field.

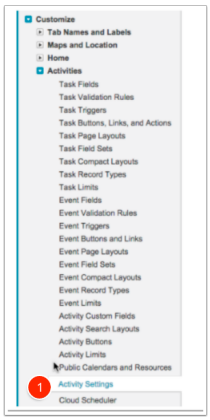
> Note: In Lightning mode, search in **Object Manager > Event**.



8 Add Presentation Field

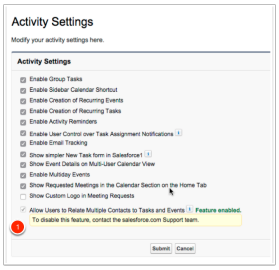
6.3.2 Step 2 - Configure Activity Settings

1. Go to **Setup >Customize >Activities >Activity Settings**.



9 Navigate to the Activity Settings page

2. Select **Allow Users to Relate Multiple Contacts to Tasks and Events** to activate, as shown in the screenshot below. You can not install the Pitcher Zero package without enabling this option.

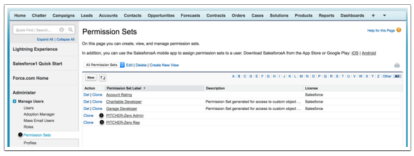


10 Configure the Activity Settings.

6.3.3 Step 3 - Add Permission Sets to Users

After installing Pitcher Zero, Admins can add and assign permission sets to individuals.

1. **PITCHER-Zero Admin** - User configuring Pitcher Zero & pushing updates out to mobile devices.
2. **PITCHER-Zero Rep** - Gives users off-line capabilities (mobile devices) and enables the sync between CRM and mobile devices.



11 Pitcher Zero Permission Sets

6.3.4 Step 4 - Create and Activate Pitcher Zero Admin Users

- You must have at least two system administrator users for the Pitcher Zero Offline Account/Contact cards push mechanism to work.
- You will need the two new admin users for the Staging and Prod environments.
- Both users can use the same email address. For example, developer-one@pitcher.com.

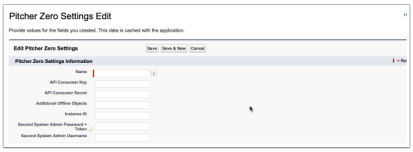
12 Pitcher Zero Admin Users

> If the Pitcher Zero push is managed only by the system administrator, you may omit to create a second system administrator.

6.3.5 Step 5 - Configure Pitcher Zero Settings

> Contact your Pitcher representative to know your Consumer Key, Secret, and Instance ID.

1. Go to **Setup > Custom Settings > Pitcher Zero Settings**.
2. Click **Manage**.
3. Click **New custom setting**.
4. Add values the following values:
    - **Name**: `Pitcher Zero Settings`
    - **Consumer key**: as provided by Pitcher representative
    - **Consumer secret**: as provided by Pitcher representative
    - **Instance ID**: as provided by Pitcher representative
    - **Second system Admin user**: as created in the previous step
    - **Second system Admin password**: check the following step

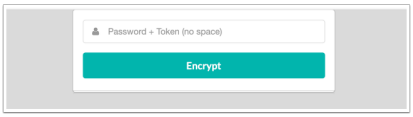


13 Pitcher Zero Settings

6.3.6 Step 6 - Generate Encrypted Password

1. Open the following link inside the Description of custom settings: https://pitcher.com/encrypt_token.
2. Enter the Password and Token.
3. Click **Encrypt**.
4. Copy the encrypted password and paste it to Second System Admin Password and Token inside **Pitcher Custom Settings**.

> This password belongs to the second system admin, and this is usually an admin for the Pitcher Managed Package.



14 Generate Encrypted Password

6.3.7 Step 7 - Generic Pitcher Zero Push

Here are the steps to perform a Pitcher Zero Push towards Pitcher Admin and Impact.

1. Login to Salesforce and go to All Tabs.

15 Salesforce: All Tabs

2. Locate and open Pitcher Zero.

16 Tab: Pitcher Zero

3. Click the Update Pitcher Zero link.

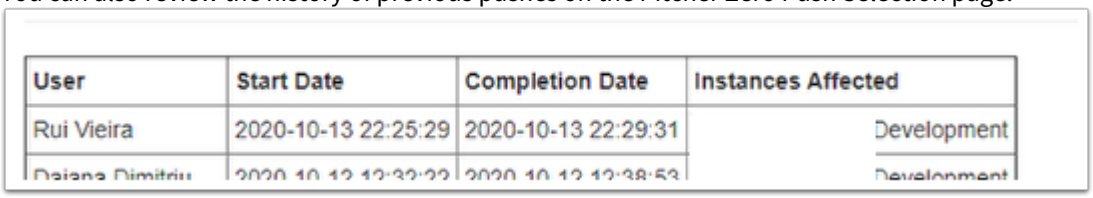
17 Update Pitcher Zero

4. On the Pitcher Zero Push Selection page:

18 Pitcher Zero Push Selection Page

   a. Please select the Pitcher Admin and Impact instances you would like to distribute the push in the first section. You can multi-select with Ctrl / Apple keys.
   b. In the second section, please select the multiple profiles of the users that will use Pitcher Impact. You can multi-select with Ctrl / Apple keys.
   c. In the third section, please select the multiple permission sets to which users (which are Pitcher Impact users) are assigned. You can multi-select with Ctrl / Apple keys.
   d. Please select the SFDC languages that the Pitcher Impact users will leverage in the fourth section. You can multi-select with Ctrl / Apple keys.
   e. You will be presented with a message to wait patiently. If the process continues to run after >2h, please contact PITCHER support.

5. Once the process is completed, a successful message appears, and the tab might automatically close itself. You can also review the history of previous pushes on the Pitcher Zero Push Selection page.



User	Start Date	Completion Date	Instances Affected
Rui Vieira	2020-10-13 22:25:29	2020-10-13 22:29:31	Development
Daiana Dimitriu	2020-10-12 12:32:22	2020-10-12 12:38:53	Development

19 Push History

6.3.8 Step 8 - Download Pitcher Zero File

1. Open Pitcher Impact.
2. Validate your Pitcher Impact credentials.
3. Select your instance if you have access to more than one instance.
   Once you select the instance to connect, Salesforce will present you with a pop-up window message indicating that you have now available for download a new file, "Pitcher Zero Files."

20 Download Pitcher Zero File

6.3.9 Step 9 - Schedule Apex Jobs

Schedule Apex Jobs are background jobs. For example, a scheduled job can also have some considerable calculation logic or timely integration with external systems.

PITCHER.PIT_AccountCallScheduleBatch

This scheduled job updates the account fields like Calls This Week, Calls This Month, Calls This Quarter, and Calls This Year.

1. Login to destination org.
2. Go to the **Developer Console**.
    a. From the **Debug** menu, click **Open Execute Anonymous Window**.
    b. Paste the following apex code based on the scheduled time as per customer need:
        - For **1 AM,** use the following code:

```
PITCHER.PIT_AccountCallScheduleBatch mgr = new
 PITCHER.PIT_AccountCallScheduleBatch();
System.schedule('PITCHER.PIT_AccountCallScheduleBatch || Everyday 1
AM', '0 0 1 * * ? *', mgr);
```

        - For **12:10 AM,** use the following code:

```
PITCHER.PIT_AccountCallScheduleBatch mgr = new
 PITCHER.PIT_AccountCallScheduleBatch();
System.schedule('PITCHER.PIT_AccountCallScheduleBatch || Everyday
12:10 AM', '0 10 0 * * ? *', mgr);
```

    c. Click **Execute**.
3. Verify under **Setup > Scheduled Job** that the apex job `PITCHER.PIT_AccountCallScheduleBatch` is scheduled to run daily at the scheduled time.

OR,

1. Go to **Setup > Apex Classes**.
2. Use the **Schedule Apex** button to schedule the job.
3. Select the `PITCHER.PIT_AccountCallScheduleBatch` apex class.
4. Set any suitable time. For example, 1 AM.
5. Set the name of the job as `PITCHER.PIT_AccountCallScheduleBatch` .