Social CRM Tools

For Salesforce.Com

Website: http://www.socialcrmtools.com

Enterprise Edition
Installation Guide

Revision 1.8

Table of Contents

Pre-Installation steps

The followings steps need to be setup prior to Installing/Executing the Application.

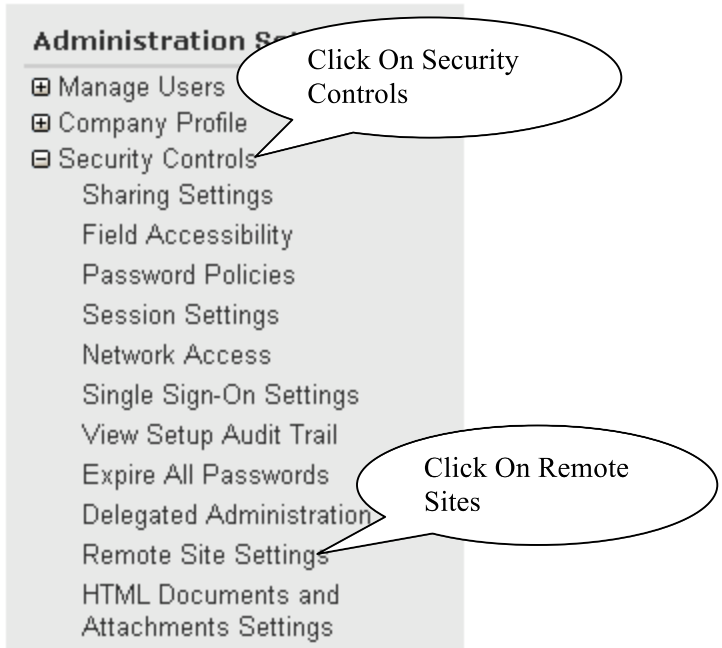
Ignoring the following steps would stop the Application Execution

Prerequisite:

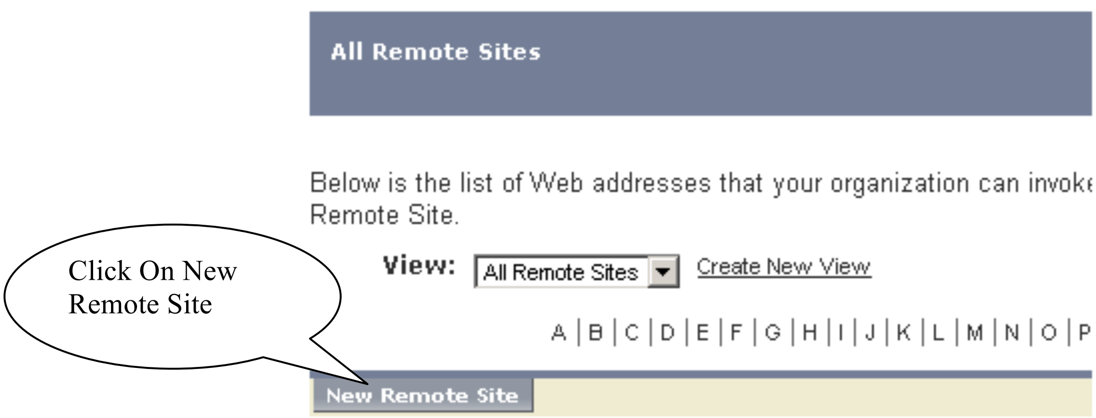
Need to Configure the Remote Site Setting(s).

Step 1:

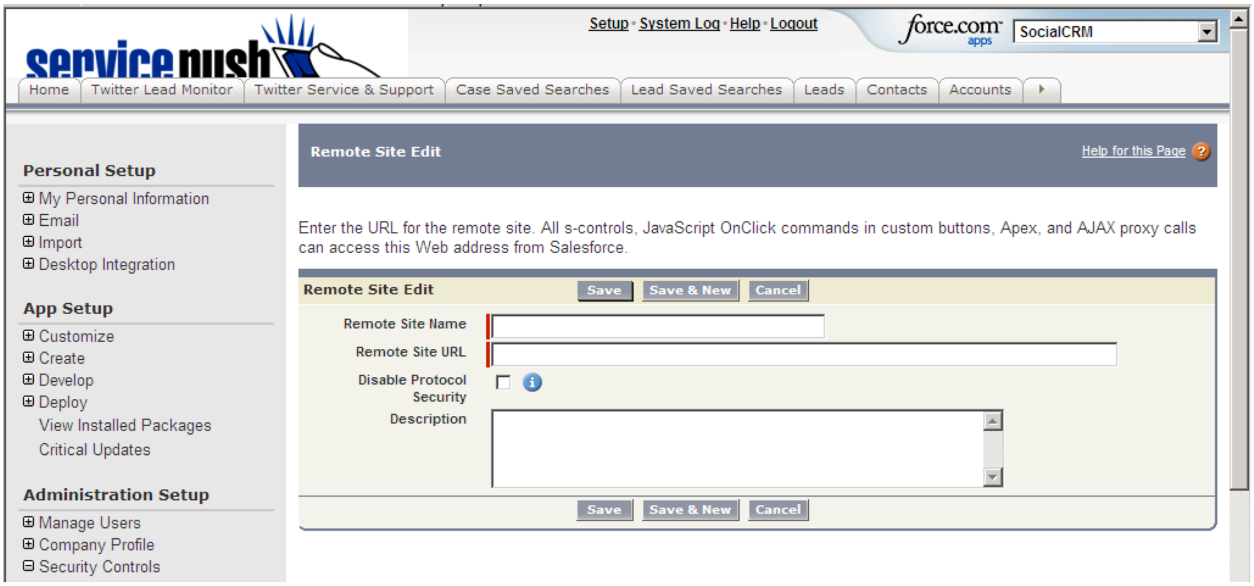
Step 2:



Step 3:



This will open a Remote Site Edit form.



Step 4:

Fill the following information in the Remote Site Settings.

Cut and Paste the Remote Site Name and Remote Site URL from the columns below and click the Save & New button after each Remote Site.

Remote Site Name	**Remote Site URL**
TwitterXML	http://twitter.com
TwitterImageURL	http://s3.amazonaws.com
Twitter	http://search.twitter.com
Tweepz	http://www.tweepz.com
FaceBookSite	http://www.facebook.com
faceBooks	https://api.new.facebook.com
faceBook	http://api.new.facebook.com
ApexDevNet	http://www.apexdevnet.com

Once this is complete you should have the Remote Sites configured like the screenshot below.

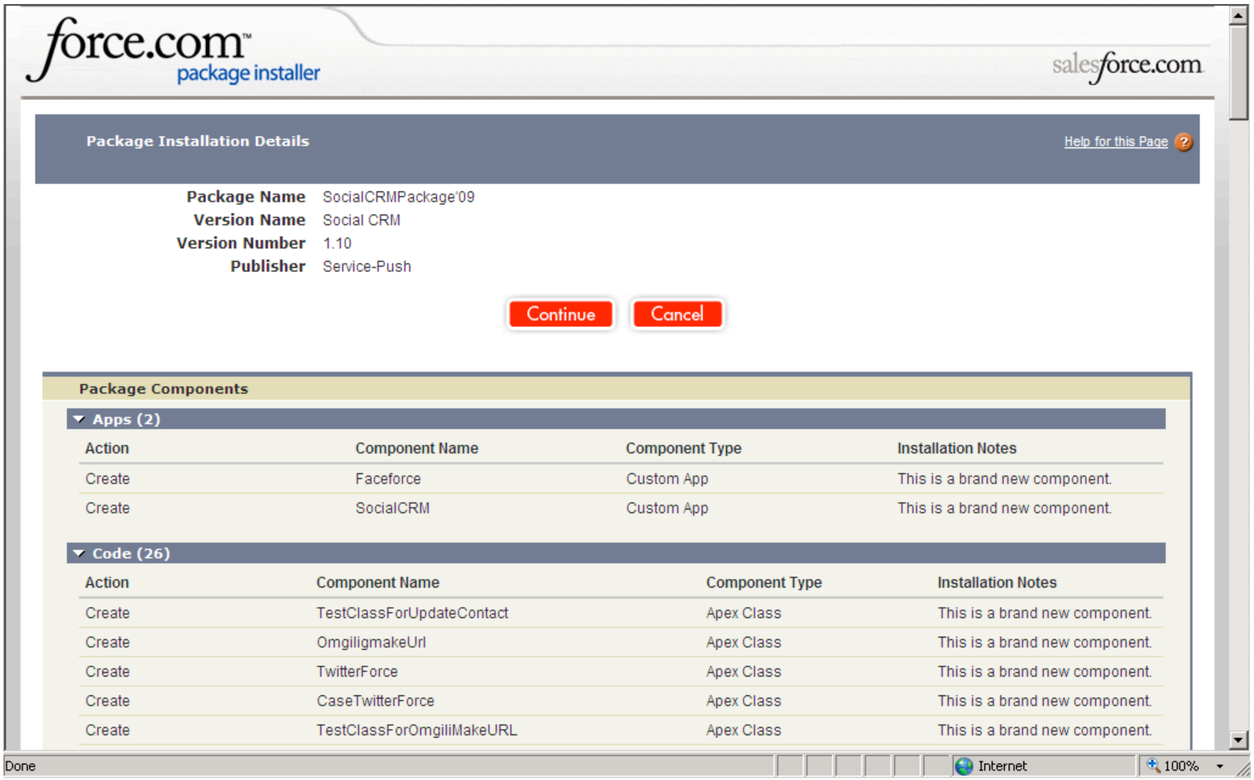
New Remote Site

Action	Remote Site Name	Remote Site URL	Created By	Created Date	Last Modified By	Last Modified Date
Edit | Del	faceBook	http://api.new.facebook.com	Patnaik, Raja	7/20/2009 3:08 AM	Patnaik, Raja	7/20/2009 3:08 AM
Edit | Del	faceBooks	https://api.new.facebook.com	Patnaik, Raja	7/20/2009 3:09 AM	Patnaik, Raja	7/20/2009 3:09 AM
Edit | Del	FacebookSite	http://www.facebook.com	Patnaik, Raja	8/12/2009 5:39 AM	Patnaik, Raja	8/12/2009 5:39 AM
Edit | Del	Tweepz	http://www.tweepz.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:06 AM
Edit | Del	Twiiter	http://search.twitter.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:39 AM
Edit | Del	TwiiterImageURL	http://s3.amazonaws.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:06 AM
Edit | Del	TwiiterXML	http://twitter.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:06 AM

Installing and Deploying the Package

Click on the install link to receive the following screenshot.

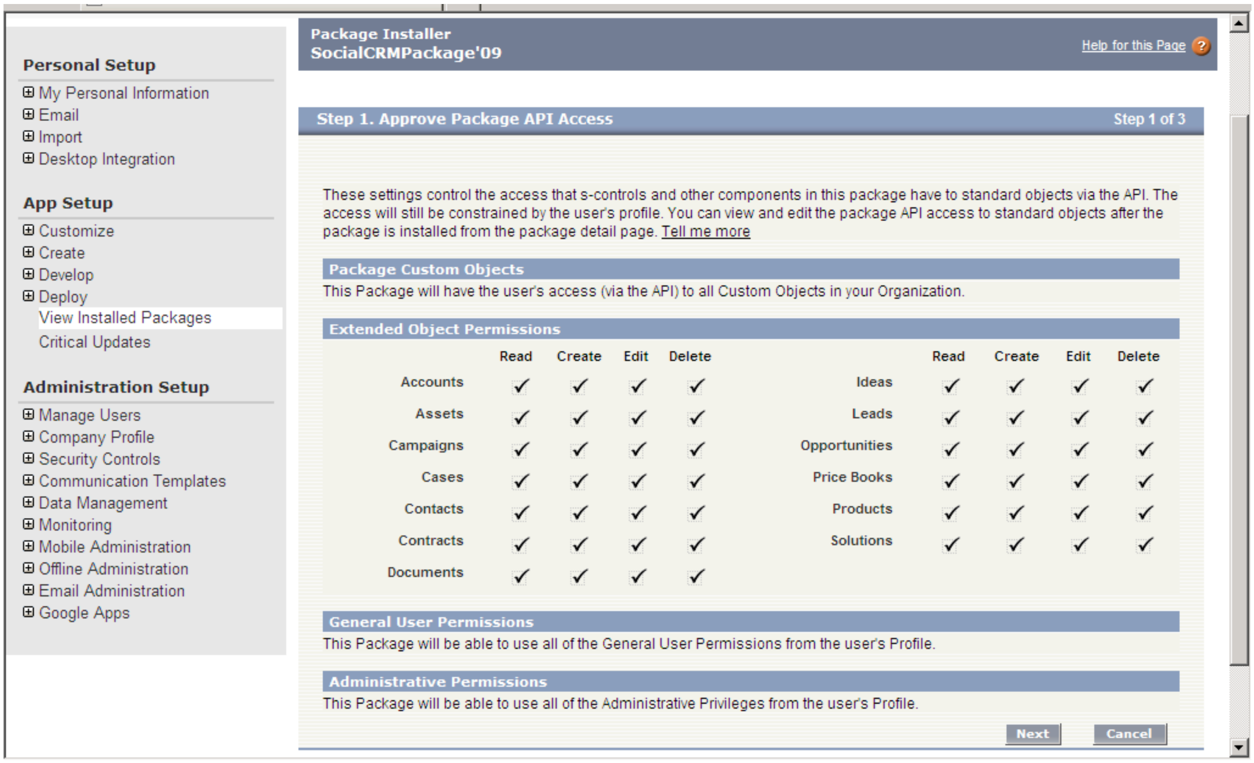
Click Continue to begin the installation



Step 1:

The Approve Package API Access window will come up.

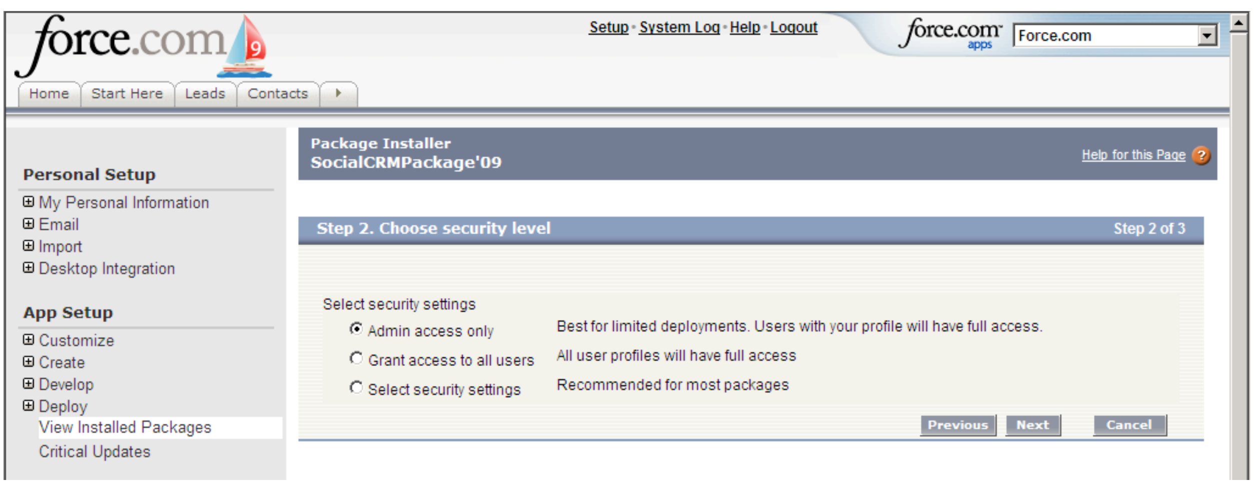
Click Next to proceed with the installation.



Step 2:

Choose your security level.

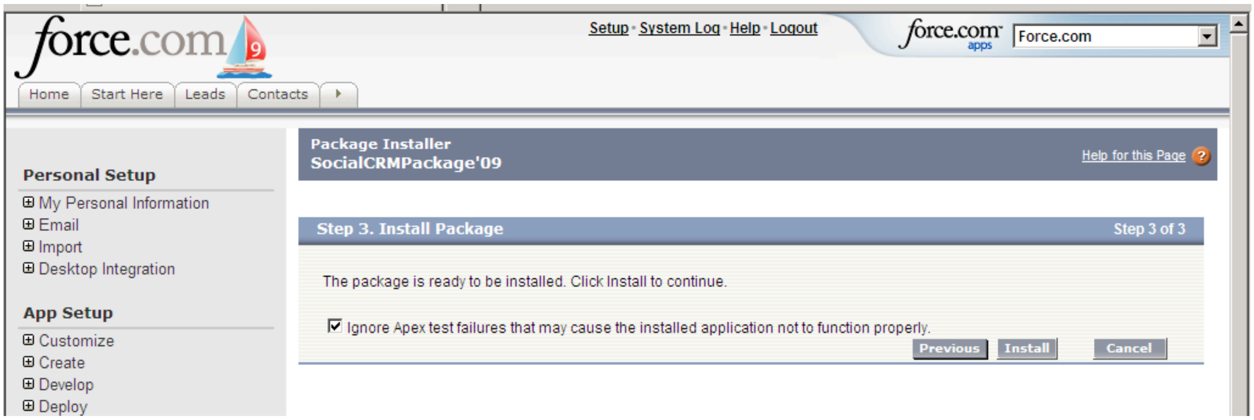
Click on Next to proceed.



Step 3:

Install the Package.

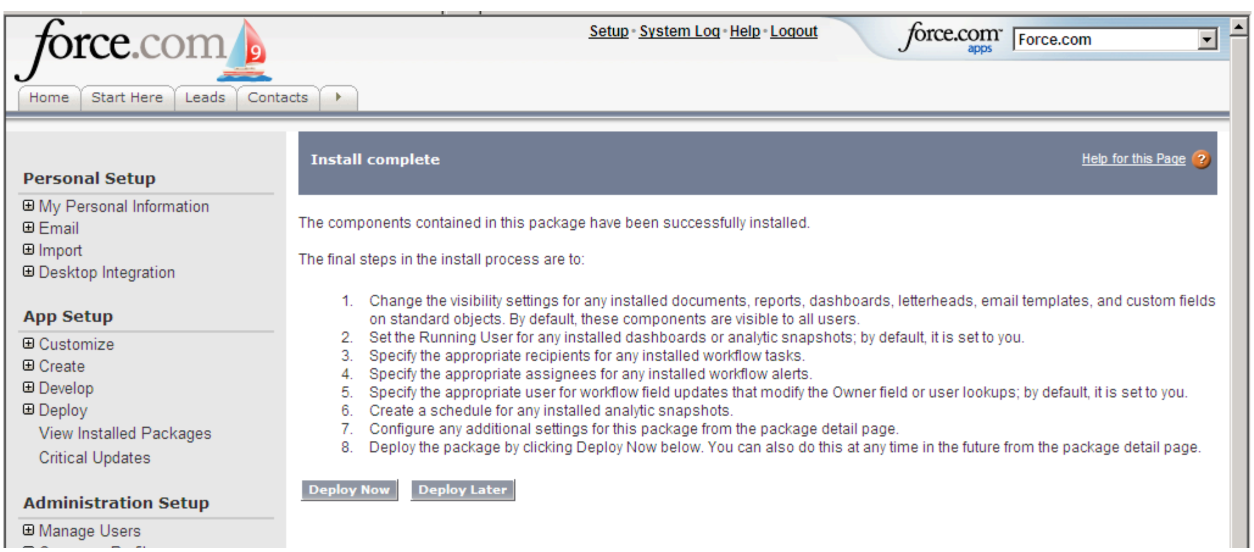
Check the "Ignore Apex test failures…" box prior to clicking on the Install button.



Step 4:

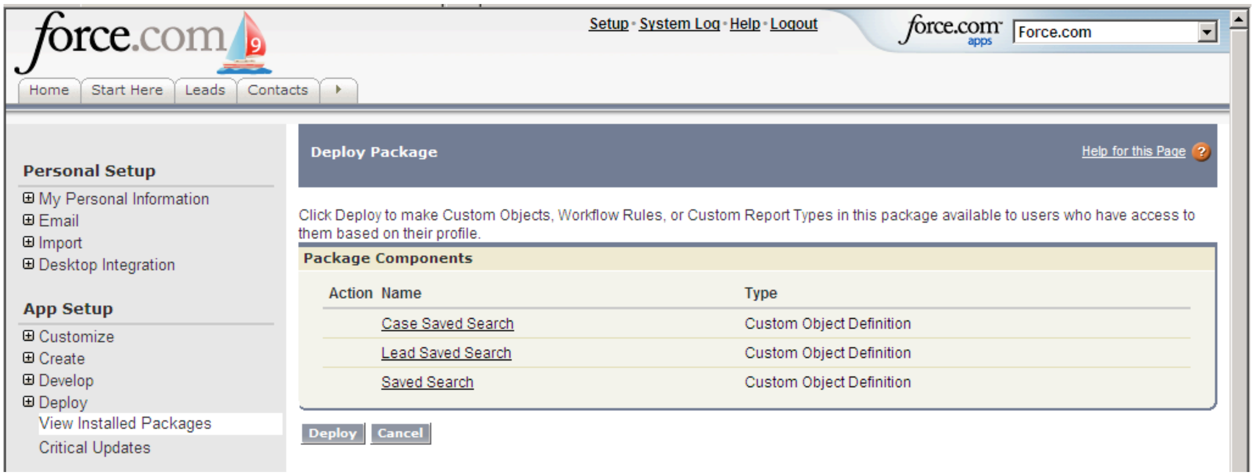
You will see the window below once you have successfully installed the Package.

Click the "Deploy Now" button to begin deployment.



Step 5:

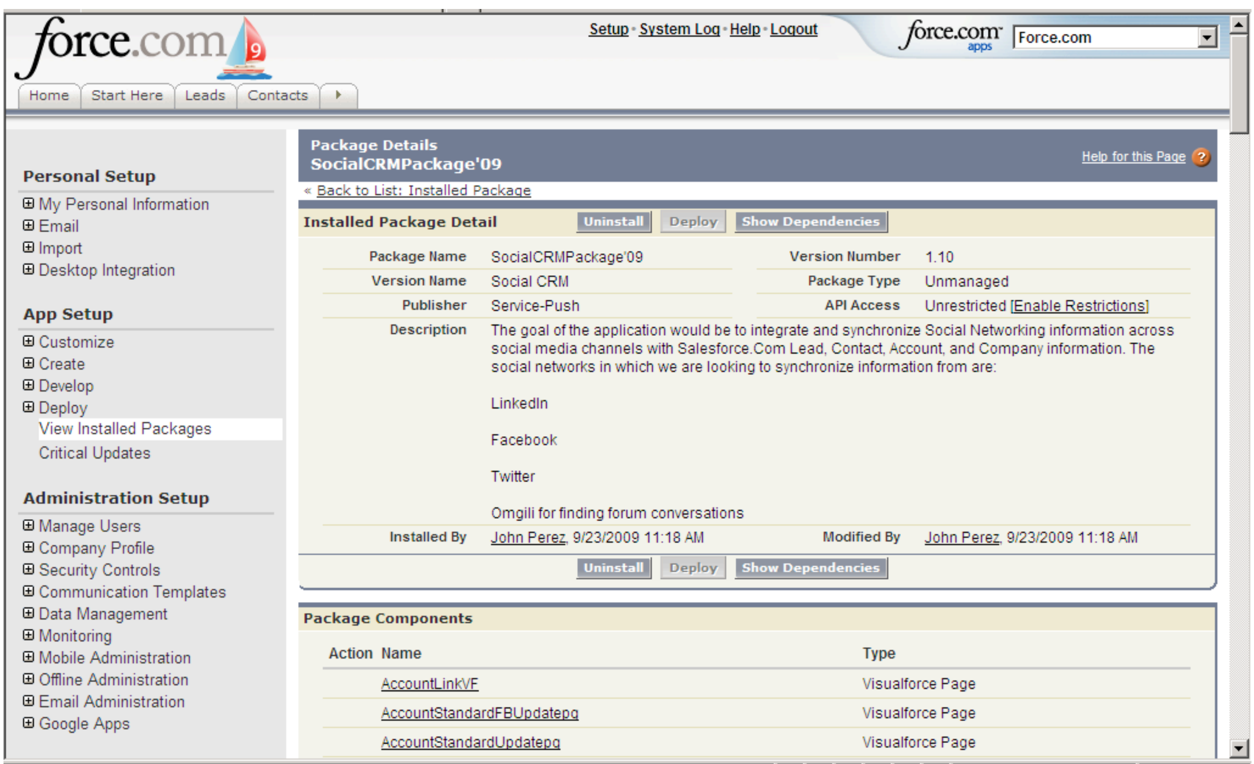
Click the Deploy button to make Custom Objects, Workflow Rules and Custom Report Types available.



Step 6:

You will see the Installed Package Detail box when the package has been successfully installed.

You may need to hit Refresh (F5) if you do not see the window right away .



Setting up Tabs

By default, the Custom Tabs are hidden.

For making them visible, need to go to the Page Layout of Lead/Contact and Account and drag and Drop the desired fields, custom buttons on the Page Layout and save it.

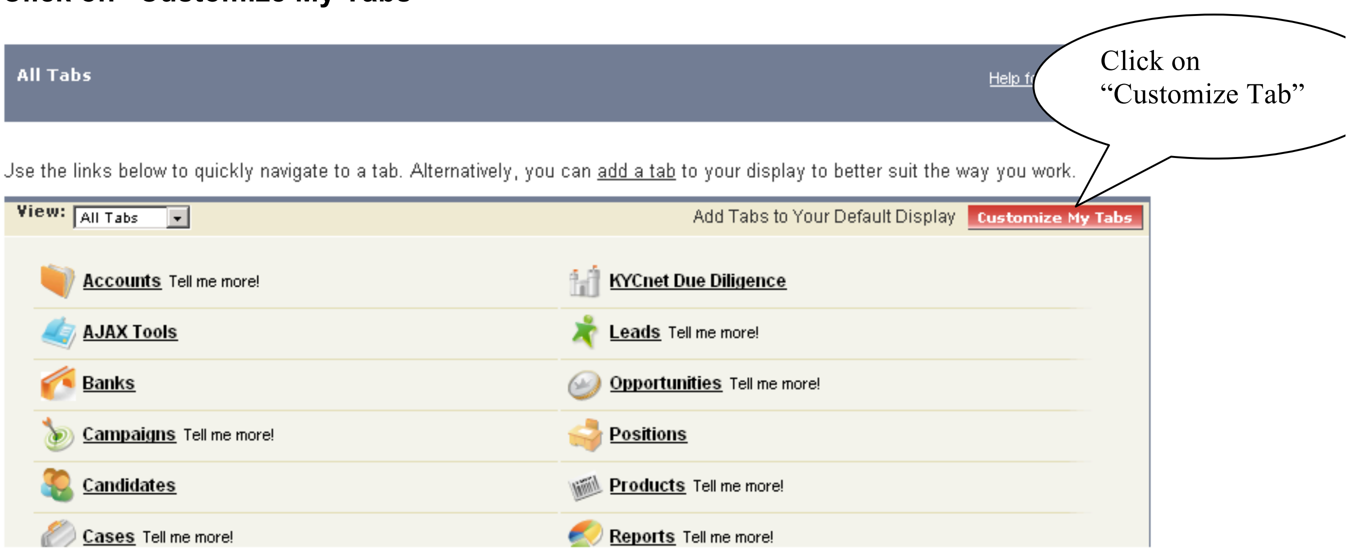
To enable the Tabs, please follow the screenshots.

Step 1:

At the bottom of the page, Click on "All Tabs" Link.

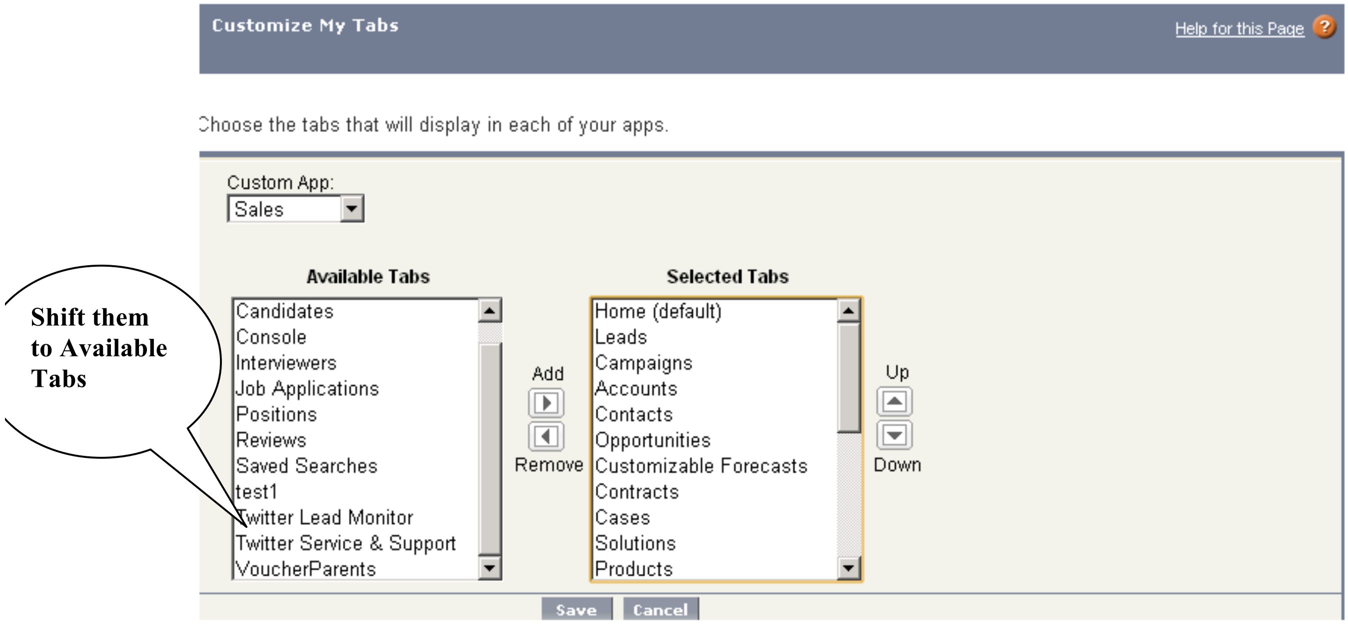
Step 2:

Click on "Customize My Tabs"



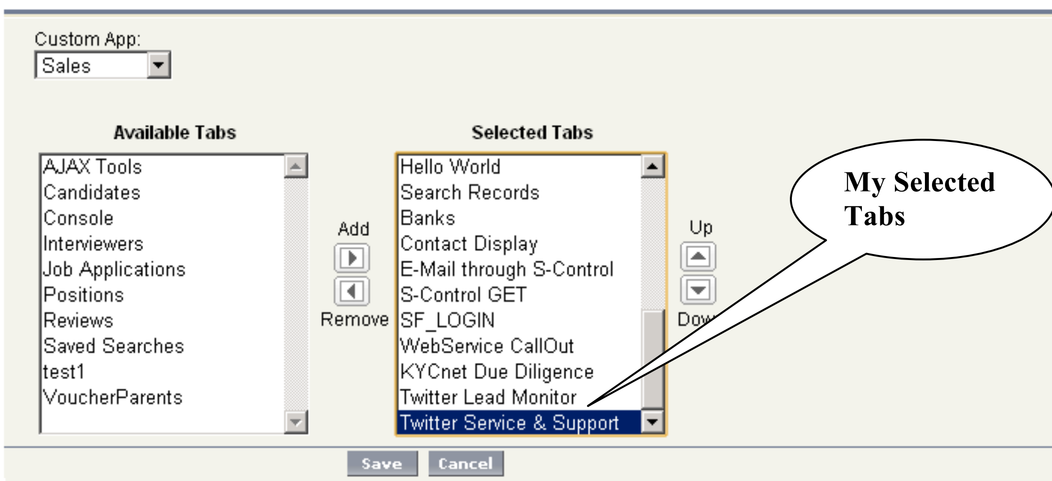
Step 3:

Now, Shift your required Tabs from Available Tabs List to Selected Tabs List and click on Save.



Step 4:

Click Save to commit your new Selected Tabs.

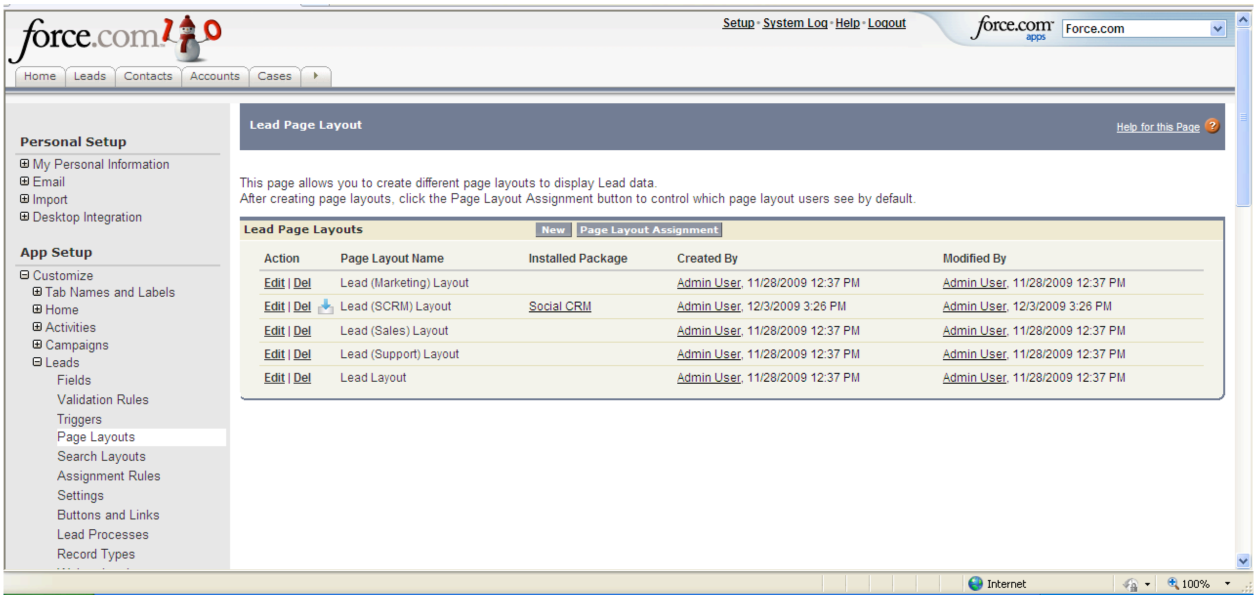


Setting up Page Layouts

After defining page layouts, assign which page layouts users see. A user's profile determines which page layout he or she sees. In addition, if your organization is using record types for a particular tab, the combination of the user's profile and the record type determine which page layout is displayed.

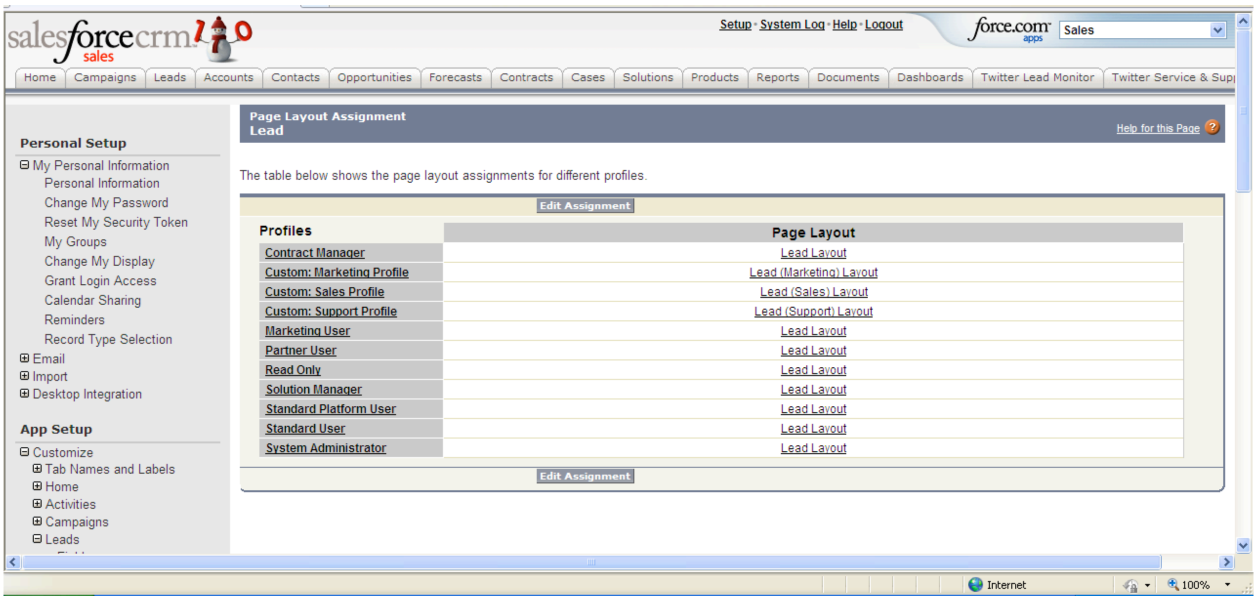
To assign page layouts:

Click Setup->Customize->Page Layouts



From the page layout click Page Layout Assignment. From the profile, click View Assignment next to any tab name in the Page Layouts section.

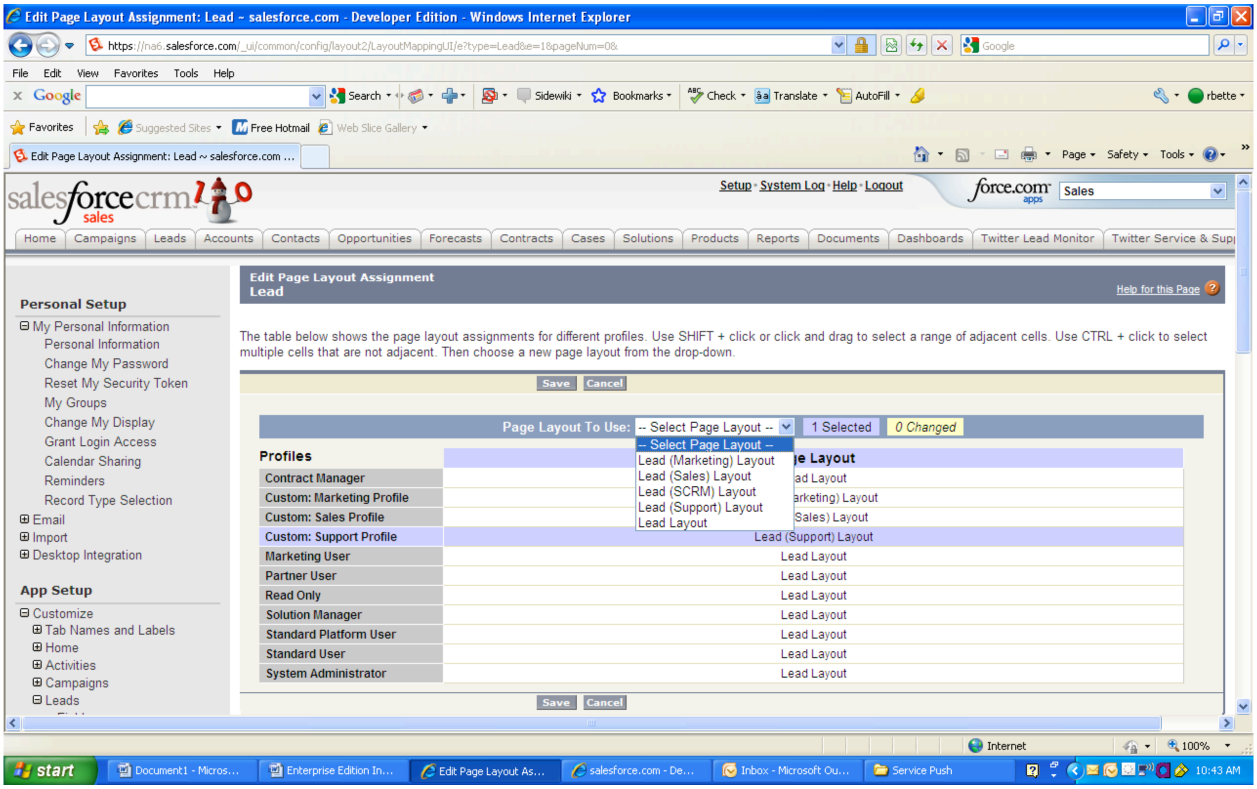
Click Edit Assignment.



Use the table to specify the page layout for each profile. The table displays the page layout assignments for each profile. If your organization uses record types, a matrix displays a page layout selector for each profile and record type.

When selecting page layout assignments:

Click a cell, column, or row heading to select all the table cells in that column or row.



Press SHIFT+click to select multiple adjacent table cells, columns, or rows.

Press CTRL+click to select multiple nonadjacent table cells, columns, or rows.

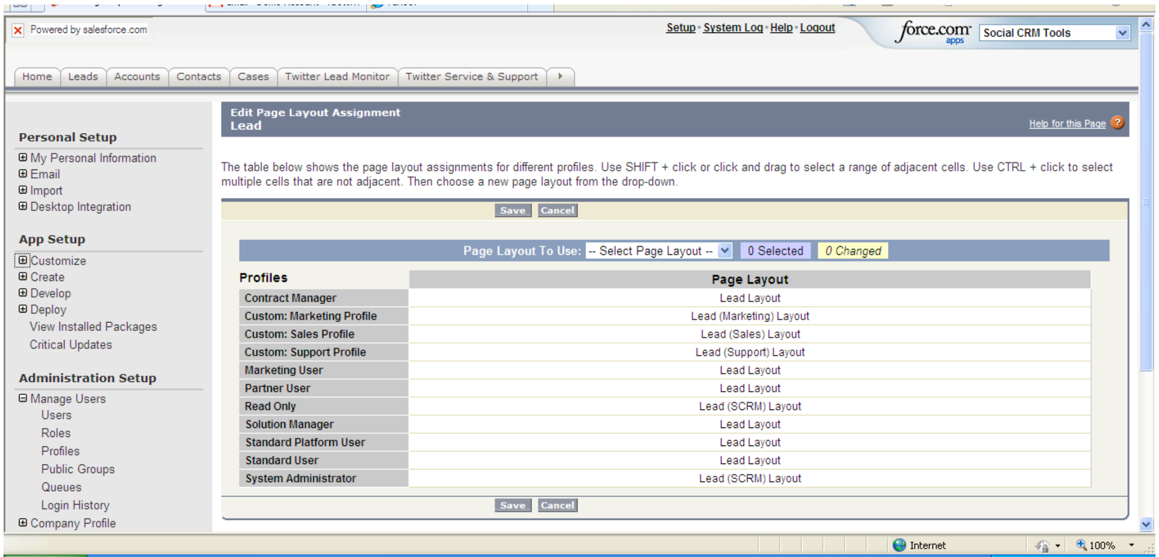
Click any cell and drag to select a range of cells.

Click Next or Prev to view another set of record types.

Select another page layout to assign from the Page Layout To Use drop-down list and repeat the previous step for the new page layout.

This is what is should like when you successfully assign the SocialCRM page layout to a profile.

Notice the Lead (SCRM) Layout has been assigned to the Read Only Profile.

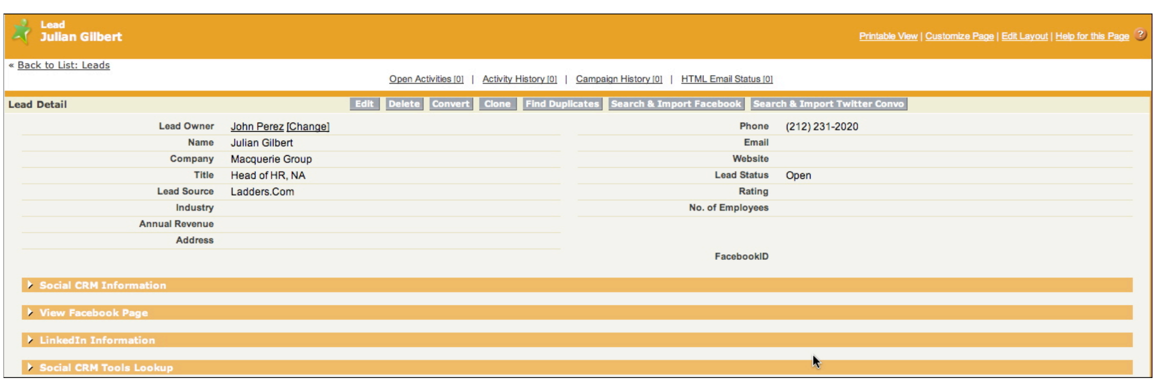


Click Save to commit your changes.

Repeat for the Contact and Account Page Layouts.

When completed, your Lead, Contact, and Account Page Layouts Should look as follows:

Lead Layout



Account Layout