

Social CRM Tools



For Salesforce.Com

Website: <http://www.socialcrmtools.com>

Enterprise Edition Installation Guide

Revision 1.8

Table of Contents

Pre-Installation steps.....	2
Installing and Deploying the Package	5
Setting up Tabs	9
Setting up Page Layouts	11

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:

Click On Setup



Step 2:

Administration Settings

- ⊕ Manage Users
- ⊕ Company Profile
- ⊖ Security Controls
 - Sharing Settings
 - Field Accessibility
 - Password Policies
 - Session Settings
 - Network Access
 - Single Sign-On Settings
 - View Setup Audit Trail
 - Expire All Passwords
 - Delegated Administration
 - Remote Site Settings
 - HTML Documents and Attachments Settings

Click On Security Controls

Click On Remote Sites

Step 3:

All Remote Sites

Below is the list of Web addresses that your organization can invoke Remote Site.

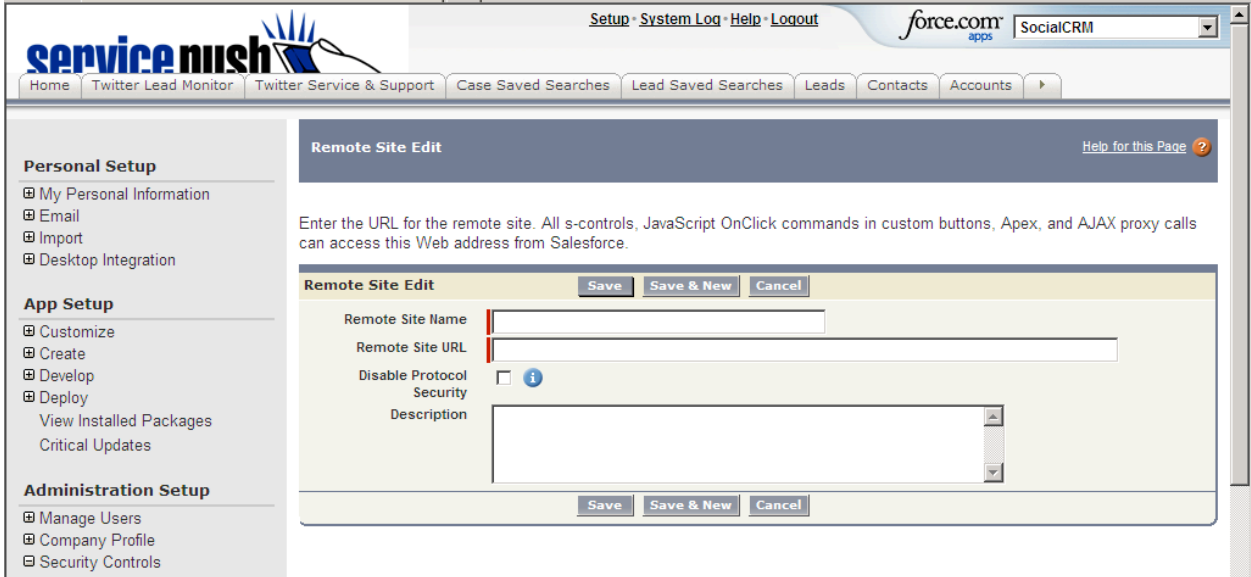
Click On New Remote Site

View: All Remote Sites [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P

New Remote Site

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.

<u>Remote Site Name</u>	<u>Remote Site URL</u>
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

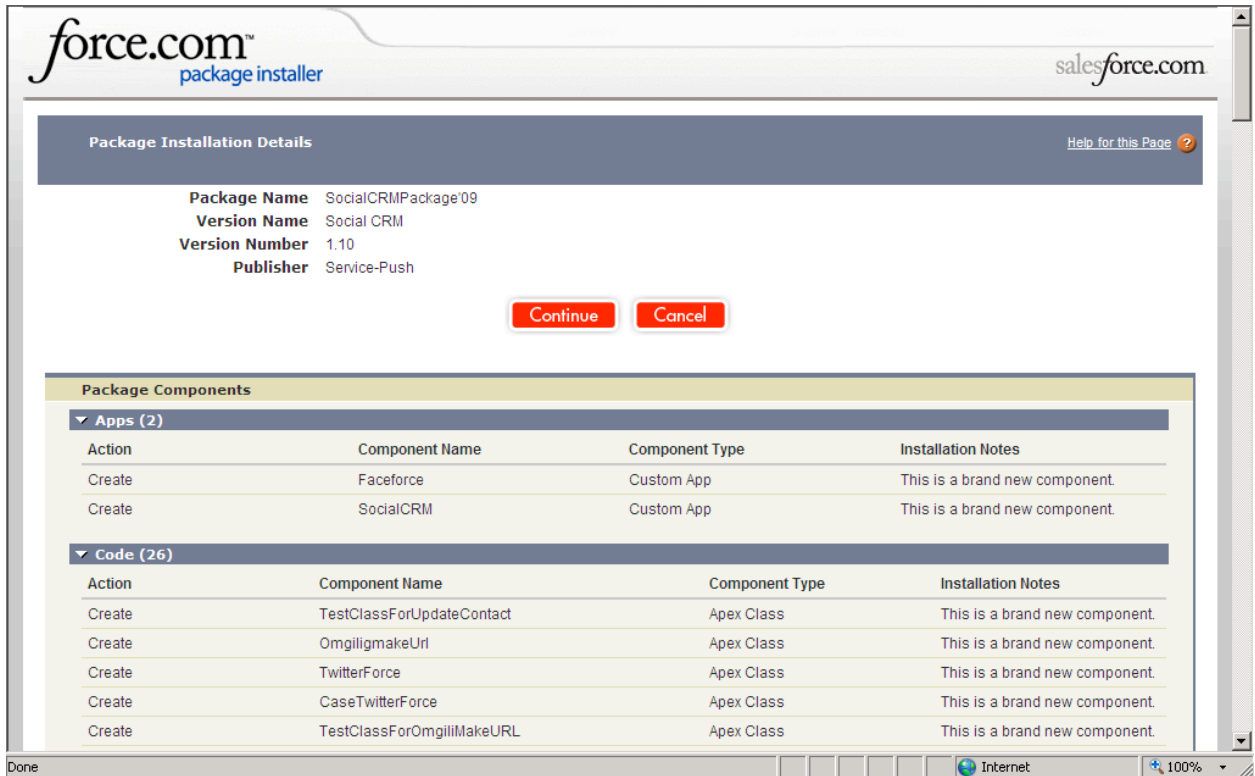
Once this is complete you should have the Remote Sites configured like the screenshot below.

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	Twitter	http://search.twitter.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:39 AM
Edit Del	TwitterImageURL	http://s3.amazonaws.com	Patnaik, Raja	7/17/2009 9:06 AM	Patnaik, Raja	7/17/2009 9:06 AM
Edit Del	TwitterXML	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.

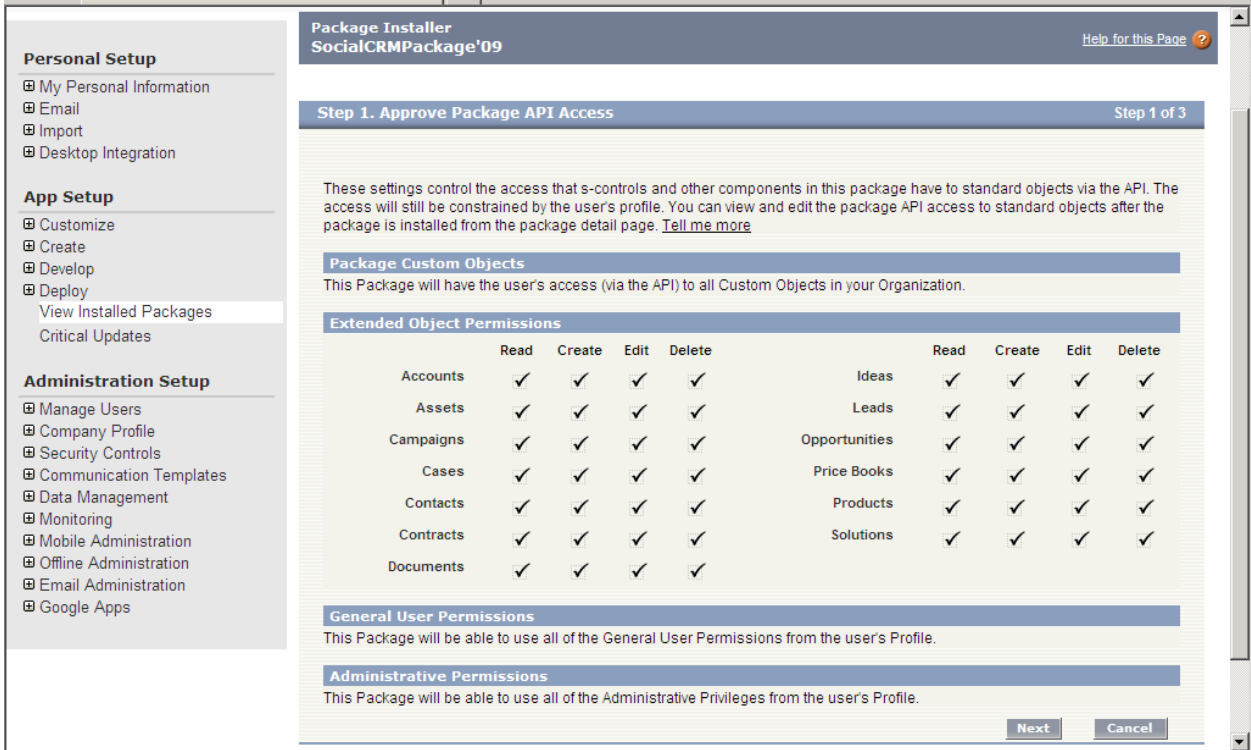
Click Continue to begin the installation



Step 1:

The Approve Package API Access window will come up.

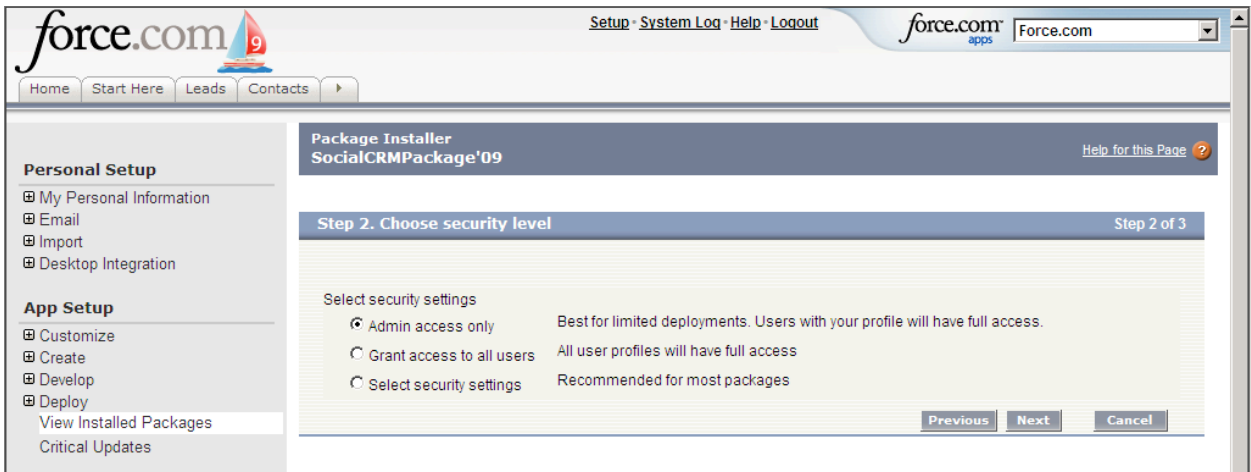
Click Next to proceed with the installation.



Step 2:

Choose your security level.

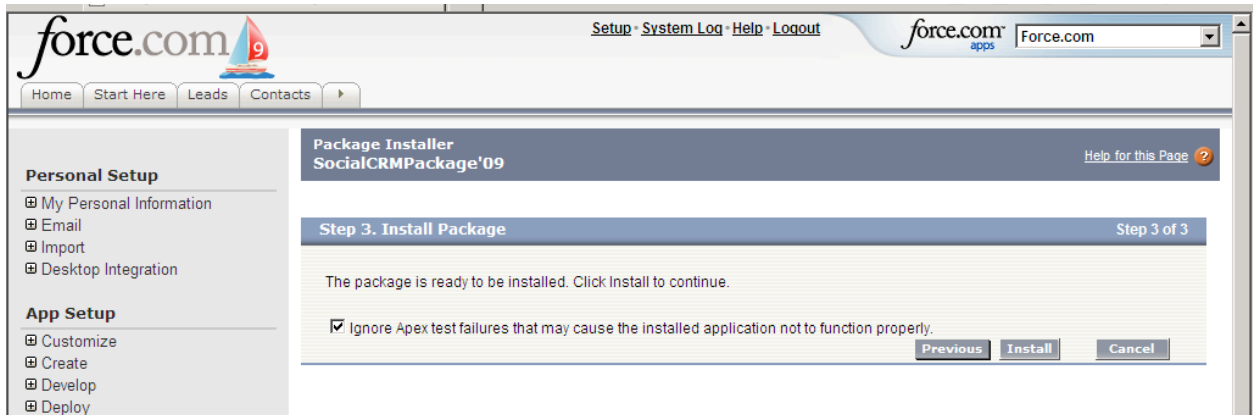
Click on Next to proceed.



Step 3:

Install the Package.

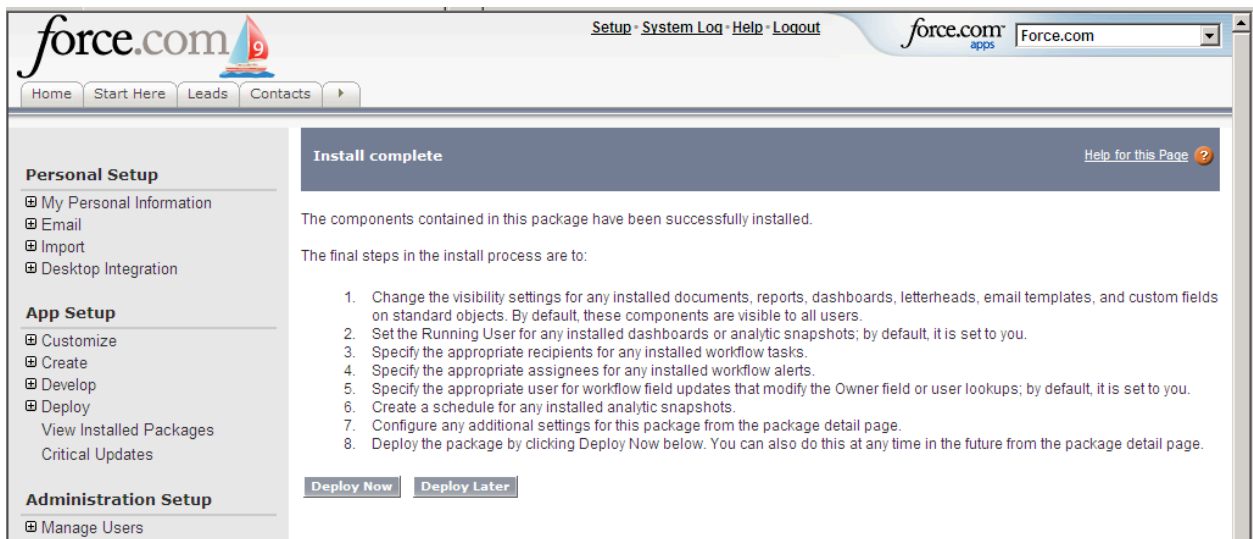
Check the “Ignore Apex test failures...” box prior to clicking on the Install button.



Step 4:

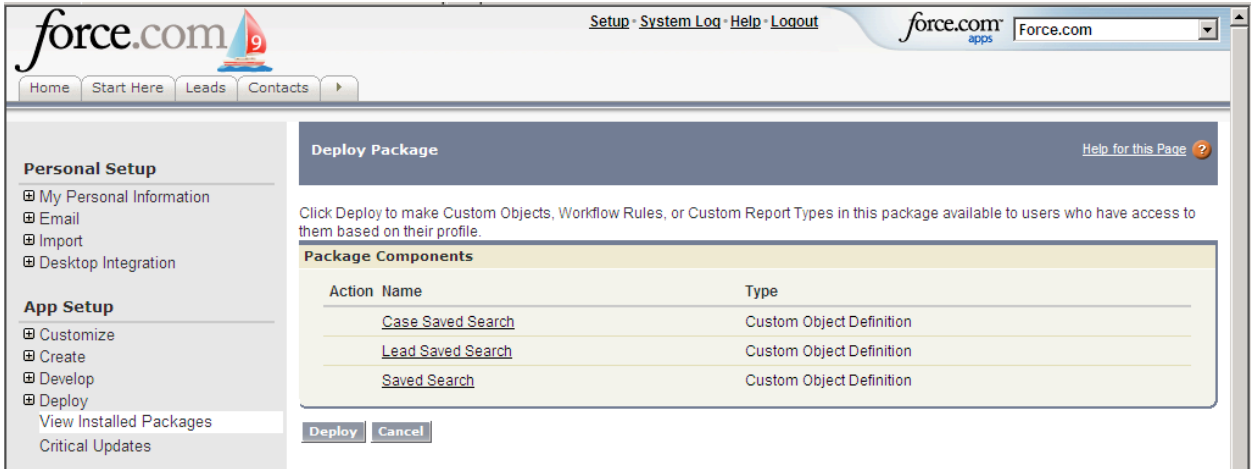
You will see the window below once you have successfully installed the Package.

Click the “Deploy Now” button to begin deployment.



Step 5:

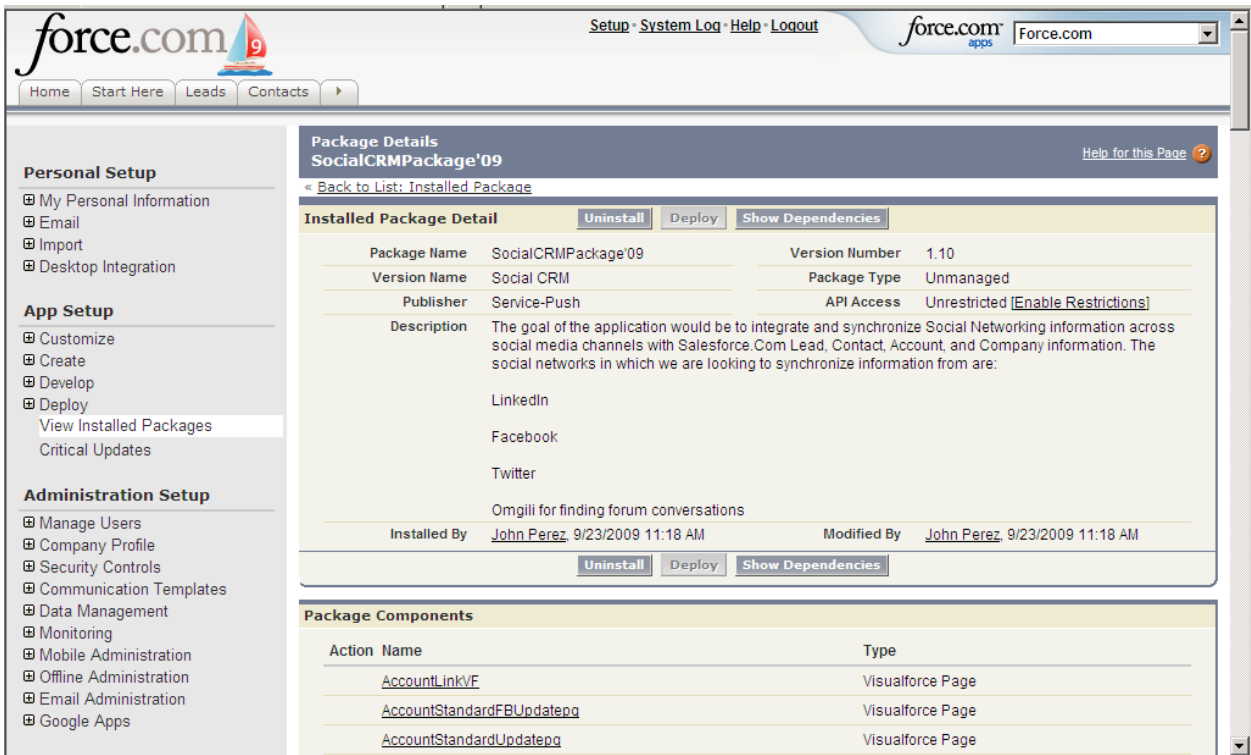
Click the Deploy button to make Custom Objects, Workflow Rules and Custom Report Types available.



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.

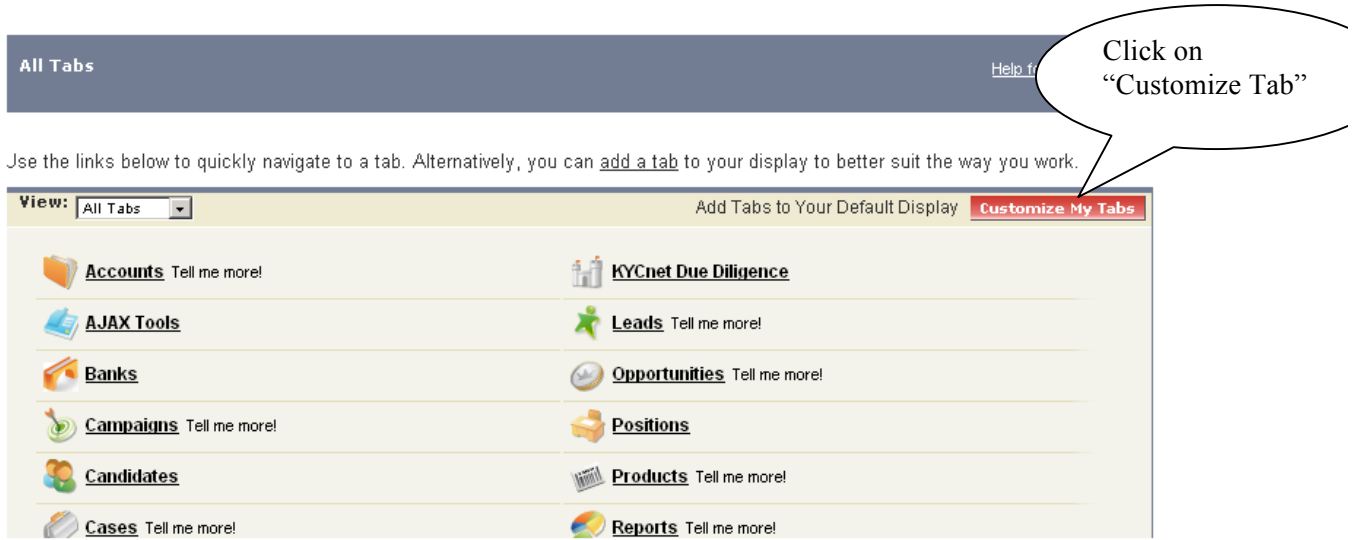
Step 1:

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.

Choose the tabs that will display in each of your apps.

Shift them to Available Tabs

Custom App: Sales

Available Tabs		Selected Tabs
Candidates	Add ▶	Home (default)
Console		Leads
Interviewers	Remove ◀	Campaigns
Job Applications		Accounts
Positions		Contacts
Reviews		Opportunities
Saved Searches		Customizable Forecasts
test1		Contracts
Twitter Lead Monitor		Cases
Twitter Service & Support		Solutions
VoucherParents		Products

Up Down

Save Cancel

Step 4:

Click Save to commit your new Selected Tabs.

Custom App: Sales

Available Tabs		Selected Tabs
AJAX Tools	Add ▶	Hello World
Candidates		Search Records
Console	Remove ◀	Banks
Interviewers		Contact Display
Job Applications		E-Mail through S-Control
Positions		S-Control GET
Reviews		SF_LOGIN
Saved Searches		WebService CallOut
test1		KYCnet Due Diligence
VoucherParents		Twitter Lead Monitor
		Twitter Service & Support

Up Down

Save Cancel

My 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.

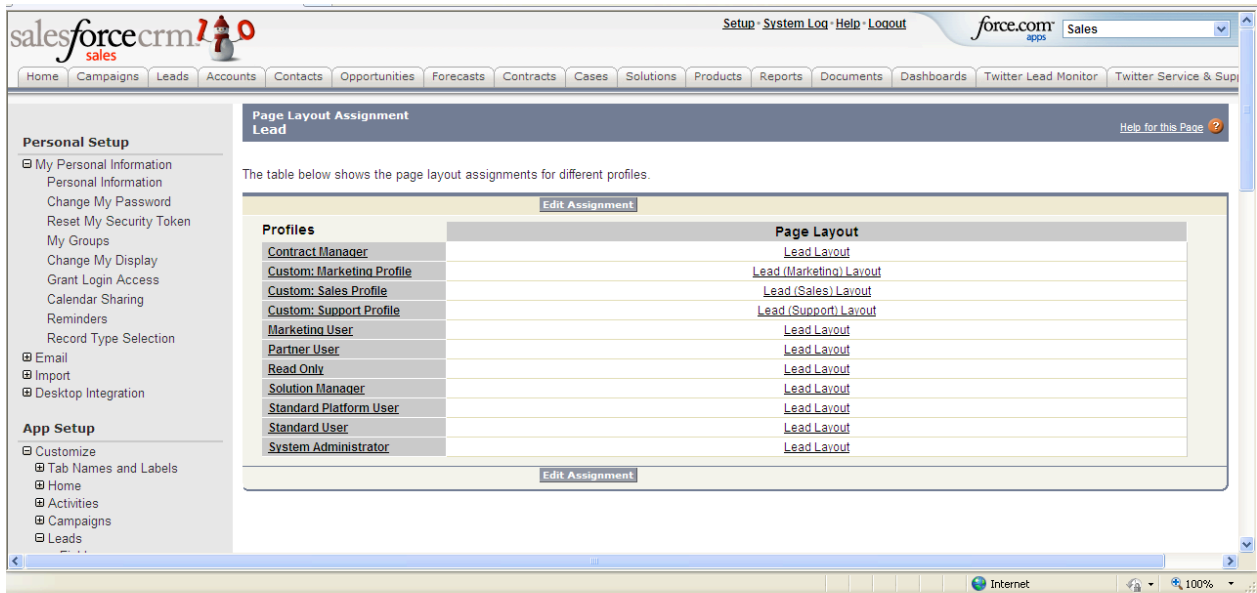
To assign page layouts:

Click Setup->Customize->Page Layouts

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit Del	Lead (Marketing) Layout		Admin User, 11/28/2009 12:37 PM	Admin User, 11/28/2009 12:37 PM
Edit Del New	Lead (SORM) Layout	Social CRM	Admin User, 12/3/2009 3:26 PM	Admin User, 12/3/2009 3:26 PM
Edit Del	Lead (Sales) Layout		Admin User, 11/28/2009 12:37 PM	Admin User, 11/28/2009 12:37 PM
Edit Del	Lead (Support) Layout		Admin User, 11/28/2009 12:37 PM	Admin User, 11/28/2009 12:37 PM
Edit Del	Lead Layout		Admin User, 11/28/2009 12:37 PM	Admin User, 11/28/2009 12:37 PM

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

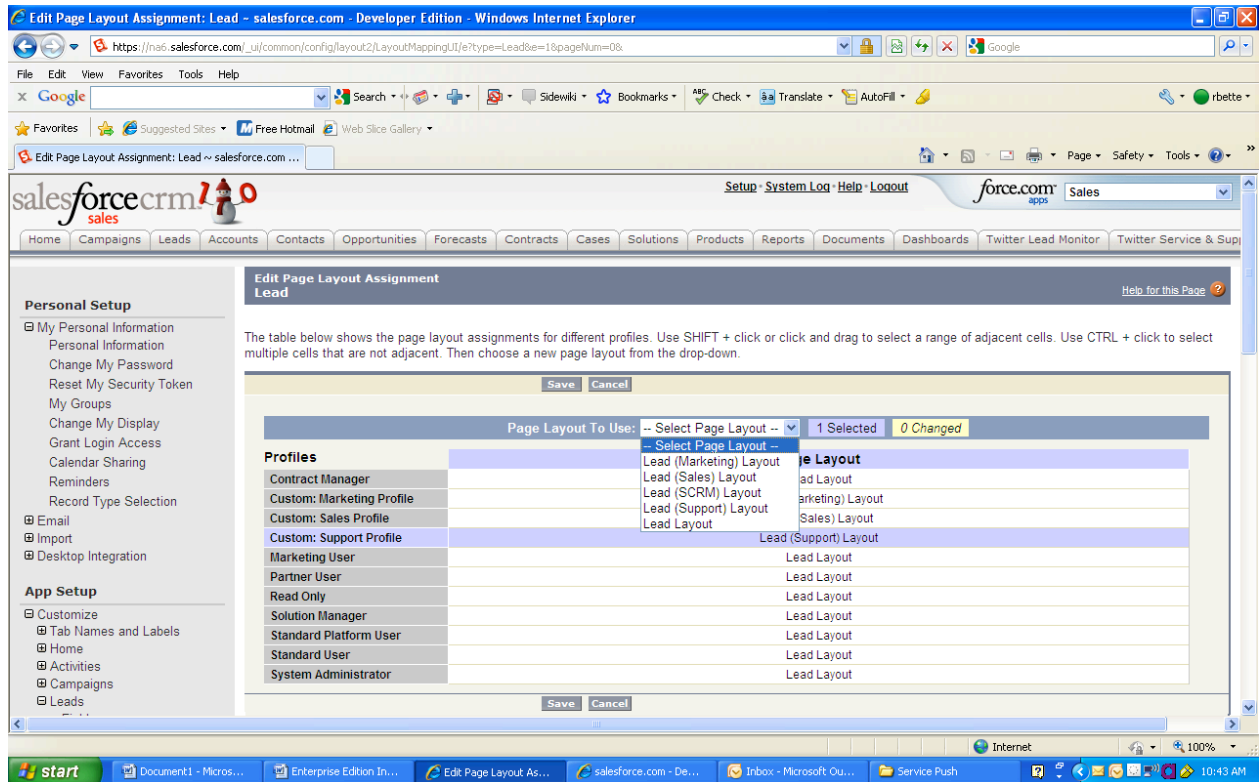
Click Edit Assignment.



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.

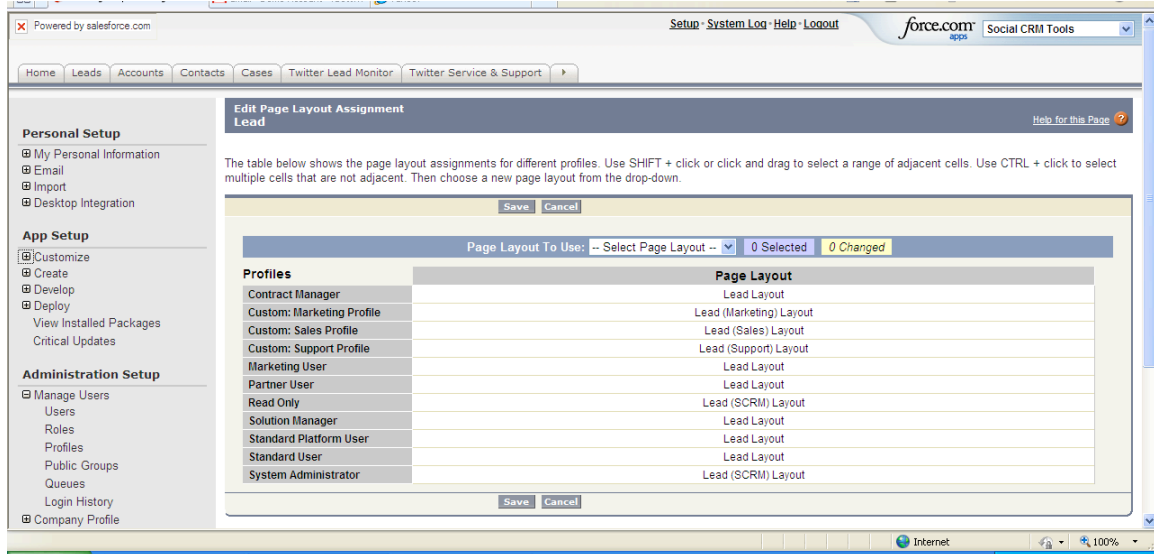
Click any cell and drag to select a range of cells.

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 it should look 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.

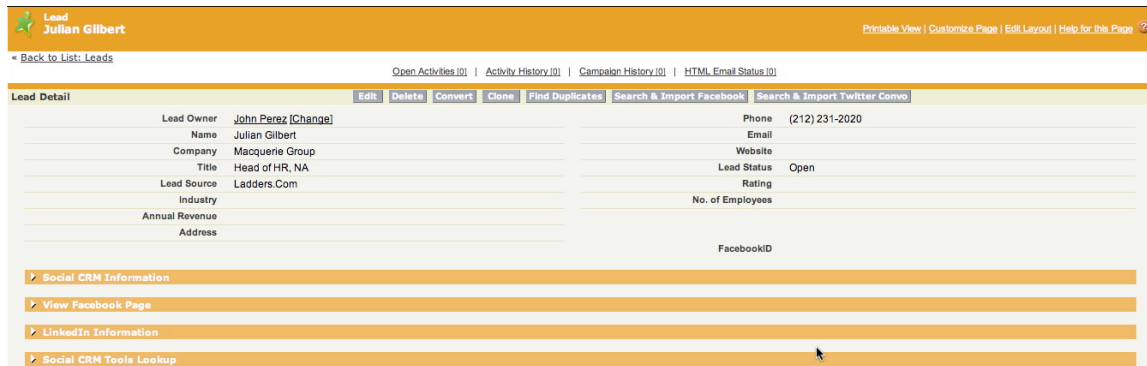


Click Save to commit your changes.

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

The screenshot displays the 'Account Detail' page for 'Premiere Global Services'. The page features a blue header with the account name and navigation links. Below the header, there are tabs for 'Contacts (5)', 'Opportunities (0)', 'Cases (0)', 'Open Activities (0)', 'Activity History (0)', 'Notes & Attachments (0)', and 'Partners (0)'. The main content area is divided into two columns for account information. The left column includes fields for Account Owner (John Perez), Account Name (Premiere Global Services), Parent Account, Type, Industry, Annual Revenue, Billing Address (100 Tormee Drive, Tinton Falls, NJ 07712), and Created By (John Perez, 5/14/2009 10:06 AM). The right column includes fields for Phone, Fax, Website, Employees, Shipping Address, and Last Modified By (John Perez, 12/3/2009 9:53 AM). Below the main information, there are five expandable sections: 'LinkedIn Company Connections', 'Facebook Information', 'Realtime Company Tweets', 'Google Map', and 'Social CRM Lookups'.

Account Detail [Edit](#) [Delete](#) [Include Offline](#)

Account Owner	John Perez (Change)	Phone
Account Name	Premiere Global Services (View Hierarchy)	Fax
Parent Account		Website
Type		Employees
Industry		
Annual Revenue		
Billing Address	100 Tormee Drive Tinton Falls, NJ 07712	Shipping Address
Created By	John Perez , 5/14/2009 10:06 AM	Last Modified By John Perez , 12/3/2009 9:53 AM
Description		

- ▶ [LinkedIn Company Connections](#)
- ▶ [Facebook Information](#)
- ▶ [Realtime Company Tweets](#)
- ▶ [Google Map](#)
- ▶ [Social CRM Lookups](#)