# Installing the *sowithit* Synergy Workflows Application

Introduction

The ***sowithit*** **Synergy Workflows** application is a comprehensive set of tools for all aspects of project, customer and contractor management. As such, it requires installation tasks beyond simply clicking "Get It Now" in the AppExchange. This document outlines these tasks.

Overview

- ✔ Install Synergy Workflows from the SalesForce AppExchange.
- ✔ A *sowithit* installer will need to log into your SalesForce environment to complete the installation, as well as configuring our server to support your deployment.
- ✔ Your system administrator will need to configure a few core data items.

Audience

This document is intended for a system administrator at an organization installing Synergy Workflows. Administrator privileges within SalesForce are assumed, as is a reasonable understanding of the SalesForce web application environment.

Step 1: Install Synergy Workflows from the SalesForce AppExchange

The installation process starts like any other SalesForce application. The basic steps are shown below; for more information, please see www.salesforce.com/appexchange/how_to_install.jsp

1. From the AppExchange page for Synergy WorkFlows, click Get It Now
2. When prompted, enter your SalesForce User Name and Password
3. On the **Examine package contents** page (next), confirm that the Synergy Workflows components will not interfere with your existing SalesForce installation (this is rarely an issue), and click **Next**.
4. On the **Choose security level** page (next), ensure that **Select security settings** is checked, then click **Next**.
5. On the **Customize security** page (next), add access for any user groups in your organization that will need to use Synergy Workflows.
6. Click **Install** on the final page. This may take a few moments to complete.
7. On the **Install complete** page, click **OK**. Note that other steps (below) need to be performed before Synergy Workflows can be deployed within your organization.

Step 2: Completion by a *sowithit* installer

The Synergy Workflows application has many aspects which go beyond what is supported by simple AppExchange deployment. Also, some areas of Synergy Workflows are hosted on our server here at *sowithit*, and thus we need to configure our server to support your deployment.

So, in order to complete the installation, an installer from *sowithit* will need to log into your SalesForce environment. You can either supply us with the user ID and password for an existing account, or create a temporary login for our installer to use. Either way, the user ID in question will need Administrator privileges; this will allow our installer to preform the final installation tasks, as well as gathering information needed to configure our server.

Step 3: Configuration of Core Data

After *sowithit* has completed your installation, there are a few items that your system administrator will need to configure. Because these relate to your specific business processes, it's necessary that someone within your own organization set them up.

First, it will be helpful if you select *sowithit* Synergy Workflows as your default application. Do this from any SalesForce page by selecting **Synergy Workflows** from the dropdown at the far upper-right corner of the screen. This will display the default set of application tabs.

Now you're ready to configure Synergy Workflows for your organization. Details on each area to be configured may be found below.

- **Page Layout Assignments**

Setup | Administratration Setup | Manage Users | Profiles... For each profile desired, click on the profile name. Click "View Assignment" for Contact, click Edit Assignment, select "Contact (Synergy Workflows) Layout", and click Save. Repeat for Account.

also need instros for custom objects...

- **Company Data** - found on SalesForce's **All Tabs** page
  This custom object holds information about your company, and is primarily used for generating forms such as invoices, works orders, and estimates. Mostly, this consists of contact information (such as address and phone) and bank details (such as account and routing numbers that will print on invoices). Our installer will have created an entry here for your company; now it's up to you to fill it in.

- **SMS templates** - found on SalesForce's **All Tabs** page
  These templates are the blank forms used to send SMS text messages to contractors and customers from within Synergy Workflows. From the **SMS Templates: Home** page, click the **New** button to create a new template.
  - **Template Name** should be short and descriptive, but is only displayed to SalesForce users (it doesn't go out in the SMS message).
  - **Content** contains the actual text of the SMS message to send. This may contain both plain text and SalesForce field names for substitution. The latter should be in the same format SalesForce uses in custom S-Controls: {!field_name}. For example, an SMS sending a job number to a customer might look like "Your job ID is {!Job_Name}". All fields from the Job, Account, Contact, or Contractor objects are permitted.

- **Standard Costs** - found on SalesForce's **All Tabs** page.
  This list comprises the standard items for which you pay your contractors, and serves as the source for the dropdown on the **Job: Add Standard Cost** custom link. Examples might include standard components used in jobs (such as a high-security deadbolt lock), or hourly labour rates paid to contractors. For each such item, enter a short, meaningful **Description** and the **Cost** (per unit) to your company. For example:
  - Description: "Labour - Day Charge Rate - A"
  - Cost: "45.00" (this is the hourly rate paid by you)

- **Standard Prices** - found on SalesForce's **All Tabs** page.
  Analogous to Standard Costs, these are the standard items for which you invoice your customers, and serves as the source for the dropdown on the **Job: Add Standard Price** custom link. Examples again might include standard components used in jobs (such as a high-security deadbolt lock), or hourly labour rates charged to customers. For each such item, enter a short, meaningful **Description** and the **Price** (per unit) that you charge. For example:
  - Description: "Labour - Day Charge Rate - A"
  - Price: "120.00" (this is the hourly rate charged by you)