Technical Configuration of the *sowithit* Synergy Workflows Application

<u>Introduction</u>
After the ***sowithit* Synergy Workflows** application is a initially installed (by an customer clicking "Get It Now" in the AppExchange), a qualified *sowithit* installer needs complete the installation by manually configuring the customer's SalesForce environment and the *sowithit* server. This document outlines these tasks.

<u>Process Overview</u>

- ✔ Create a **Company Data** object for customer
- ✔ Manually add custom fields and links to customer's Accounts and Contacts objects and page layouts.
- ✔ Extend JavaScript on the *sowithit* server to support the new deployment.

<u>Audience</u>
This document is intended for a technical individual, with SalesForce development experience, employed by *sowithit*. This individual must have administrator-level privileges on both the *sowithit* server and the new customer's SalesForce environment until configuration is complete.

<u>Step 1 - Create a **Company Data** object for customer</u>
The new customer will need a **Company Data** object to hold information about their organization.

- Log into the new customer's SalesForce environment, using a login with System Administrator privileges
- On the **All Tabs** page, click **Company Data**
- Click **New**
- Enter the customer's company name into the **Company Data Name** field
- Click **Save**

It will be up to the customer to fill in the rest of the Company Data fields.

Step 2: Manually add custom fields and links to Accounts object and page layout

Uploading to the SalesForce AppExchange does not include custom fields or links added to standard objects (like Accounts), so these need to be added manually after the app is installed by a customer. Log into the new customer's SalesForce environment, using a login with System Administrator privileges, go to **Setup** | **Accounts**, and add the following:

- **Custom Fields**

Label	**Name**	**Type**	**Other Parameters**
Alternate Phone	Alt_Phone	Phone	
Hide Details from Contractor	Hide_Details	Checkbox	Default Value: Unchecked
Invoices Attn Of	Attn_Of	Text(127)	
Latitude	Latitude	Number(2, 6)	
Longitude	Longitude	Number(3, 6)	
Marketing	Marketing	Checkbox	Default Value: Unchecked
Payment Type	Payment_Type	Picklist	Values CREDIT CARD ACCOUNT 30 DAYS INVOICE 7 DAYS BACS OTHER INVOICE 30 DAYS CASH CHEQUE
Sage A/C	Sage_AC	Auto Number	Display Format: {000} Starting Number : 1 Generate for existing records: YES
Source	Source	Picklist	Values YELL.COM REFERRAL NEWS PAPER LEAFLET WEB SITE OTHER KEYS GALORE SCOOT TALKING PAGES

- **Custom Links**

Label	**Type**	**Content**
Create New Job	Custom S-Control	New Job from Account
Export for Sage	URL	https://sslrelay.com/s173592901.websitehome.co.uk/salesforce/sage_export.php?type=account&id={!Account_ID}&session={!API_Session_ID}&location={!API_Partner_Server_URL_70}
Find Location from Postcode	Custom S-Control	Geocode Account
Show on Map	Custom S-Control	Show Map

- **Page Layout**

  On the next page is the standard Synergy Workflows account page layout. It is recommended that you create a new page layout, **Account (Synergy Workflows) Layout**, based on the customer's default Account Layout.

Page Layout Name Account Layout

Account Information

Account Owner	Phone
* **Account Name**	Alternate Phone
Type	Fax
Account Site	Website
Parent Account	Rating
Account Number	Ticker Symbol
Industry	Ownership
Annual Revenue	Employees
Invoices Attn Of	SIC Code
Payment Type	Marketing
Source	Hide Details ...
	Sage A/C

Address Information

Billing Address	Shipping Address
Latitude	
Longitude	

Description Information

Description

Useful Links

Create New Job	Export for Sage
Show on Map	Find Location...

Additional Information

System Information

Created By	Last Modified By

Related List Section

- Contacts
- Jobs
- Open Activities
- Activity History
- Opportunities
- Cases
- Partners
- Notes & Attachments

<u>Step 3: Manually add custom fields and links to Contacts object and page layout</u>
As with Accounts, custom Contacts fields and links need to be added manually after the app is installed by a customer. Log into the new customer's SalesForce environment, using a login with System Administrator privileges, and add the following:

- **Custom Fields**

Label	Name	Type	Other Parameters
Latitude	Latitude	Number(2, 6)	
Longitude	Longitude	Number(3, 6)	
Skype	Skype	Formula (Text)	Formula: HYPERLINK("callto://"&{!Phone},"Click here to call this contact with Skype")

- **Custom Links**

Label	Type	Content
Find Location from Postcode	Custom S-Control	Geocode Contact
Send SMS	URL	https://sslrelay.com/s173592901.websitehome.co.uk/salesforce/sms.php?Contact_MobilePhone={!Contact_MobilePhone}&session={!API_Session_ID}&location={!API_Partner_Server_URL_70}
Show on Map	Custom S-Control	Show Map

- **Page Layout**
  On the next page is the standard Synergy Workflows contact page layout. It is recommended that you create a new page layout, **Contact (Synergy Workflows) Layout**, based on the customer's default Contact Layout.

Page Layout Name Contact Layout

Contact Information

Contact Owner	Phone
* **Name**	Mobile
* **Account**	Fax
Title	**Email**
Department	Email Opt Out
Reports To	Skype
Lead Source	

Address Information

Mailing Address	Other Address
Latitude	
Longitude	

Description Information

Description

Useful Links

Send SMS	Find Location...
Show on Map	

Additional Information

Birthdate	Home Phone
Last Stay-in-...	Other Phone
Last Stay-in-...	Assistant
	Asst. Phone

System Information

Created By	Last Modified By

Related List Section

Open Activities
Opportunities
Cases
HTML Email Status
Activity History
Notes & Attachments

Step 4: Extend **deployment.js** to support new customer

The deployment.js script (in the /salesforce directory on the *sowithit* web server) contains an array of values, used by other JavaScript routines, that are deployment-dependent. A new set of values must be added to this array for each deployment supported.

The new section should be commented with the name of the customer, and will start with lines like these:

```
deploymentData['Job']['a04'] = [];
deploymentData['Job']['a04']['field'] = [];
deploymentData['Job']['a04']['link']  = [];
```

The 'Job', 'field', and 'link' indices should remain unchanged for the new deployment. The second index (*a04* in the above example) is the base SalesForce ID for the Job object. This can be derived from the URL of the deployment's Jobs page (for example, https://na2.salesforce.com/**a04**/o).

Once the new section is started, the remaining groups of values should be replicated from an existing deployment and filled in as follows.

- **Job page fields**

  Example:
  ```
  deploymentData['Job']['a04']['field']['street']      = '00N30000001D6Qo';
  deploymentData['Job']['a04']['field']['city']        = '00N30000001D6Qp';
  deploymentData['Job']['a04']['field']['state']       = '00N30000001D6Qq';
  deploymentData['Job']['a04']['field']['postCode']    = '00N30000001D6Qr';
  deploymentData['Job']['a04']['field']['phone']       = '00N40000001Lfgi';
  deploymentData['Job']['a04']['field']['accountName'] = 'CF00N30000001D6MO';
  deploymentData['Job']['a04']['field']['accountId']   = 'CF00N30000001D6MO_lkid';
  deploymentData['Job']['a04']['field']['contractor']  = 'CF00N30000001LWvj';
  ```

  Each value is a field ID extracted from the HTML source of the deployment's SalesForce Job edit page. For example, the **City** field HTML code will look like this:

  ```
  <label for="00N30000001D6Qp">Site City</label>
  ```

  Extract the ID for each field and paste it into the appropriate **deploymentData** value. Note that the address/phone fields all refer to the **Site Address**.

- **Custom SControl links**

  Example:
  ```
  deploymentData['Job']['a04']['link']['newLead']     = '00b40000000wBdB';
  deploymentData['Job']['a04']['link']['newAccount']  = '00b40000000wBdC';
  deploymentData['Job']['a04']['link']['copyAddress'] = '00b40000000wBdG';
  deploymentData['Job']['a04']['link']['geocode']     = '00b40000000wBlF';
  ```

  The values here are the internal SalesForce IDs for custom SControl links, known as *lid*s. These may be obtained by temporarily adding custom links for the required SControls to the deployment's Job page layout. The *lid* will then appear as a parameter in the linked URL, like this:

  ```
  https://na2.salesforce.com/servlet/servlet.Integration?lid=00b40000000wBdB&eid=a04400000050Z
  ```

  Extract the *lid* parameter for each link and paste it into the appropriate **deploymentData** value. The custom links needed are:
  - `newLead` = **Create New Lead**
  - `newAccount` = **Create New Account from Job**
  - `copyAddress` = **Copy Address from Account**
  - `geocode` = **Find Location from Postcode**