beDirect

Installation instructions
for the beServe Salesforce app (Lightning UI)

for the beServe Data Quality address management solution

Contents

1 System requirements

At least one of the following editions is required to install the Salesforce package:

- Salesforce Enterprise Edition
- Salesforce Unlimited Edition
- Salesforce Developer Edition
- Salesforce Professional Edition

For use in Salesforce, on the user side a modern browser (Firefox 50+, Chrome 50+, Opera 40+, Safari 10+, Microsoft Edge 14+) is required on a desktop operating system (Windows 7, 8, 10, or Mac OSX or Linux).

Note regarding disk space requirements:

Please note that our beServe Salesforce app uses referencing for the data objects and each piece of data is therefore given its own data object. This means that additional memory is required for each data record compared using beServe.

As a benchmark for the disk space requirements, you can expect approx. 2 kB per data object, resulting in an approx. 200 MB requirement for 100,000 data records.

2 Installation

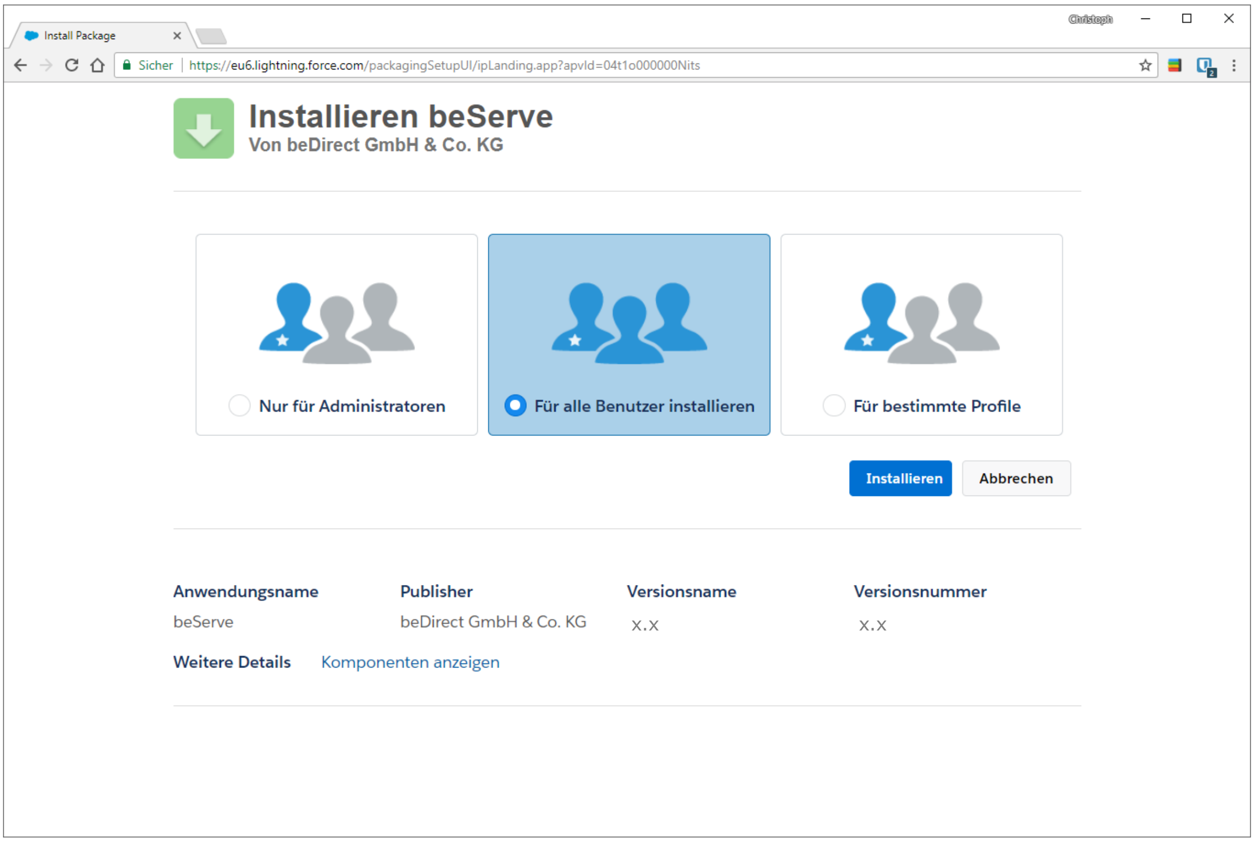
This section explains what components have to be installed and enriched to install the app in Salesforce and integrate the necessary elements in Salesforce.

To install our beServe Salesforce App, use the administrator user. Make sure your user has been granted access to all the Visual Force pages and Apex classes that the app uses. He must also be allowed to create triggers

The admin must have permission to download and install App-Exchange packages.

Start the installation from the URL contained in the email.

When installing in a sandbox organisation, you must replace the first part of the URL with » https://test.salesforce.com.



The registration screen for connecting to beServe is shown.

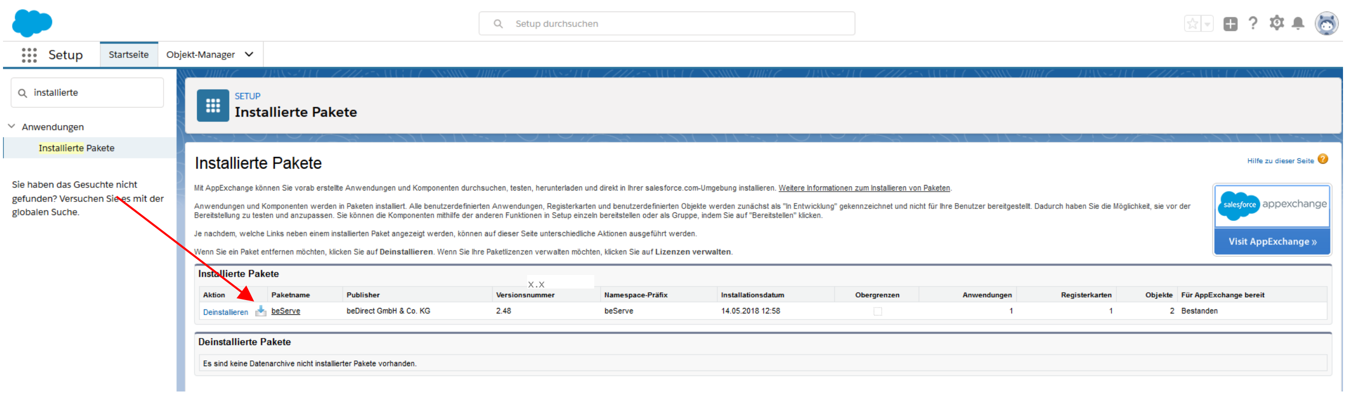
You can specify an alternative email address which you would like beDirect to contact you on if it is not the same as your Salesforce user email address. If you would like to send us a text, you can write it in the “Anmerkungen” field.

Click on the “Register” button; this will initially activate a test mode (trial version).

If no registration mask is displayed, please deactivate the API access restrictions. Then switch to the beServe tab.

This restriction must also be deactivated for the use of user-defined objects.

Click on the Setup link and select the “Installed packages from” item under “Setup”.



Click on the package name “beServe”.

Select [Disable restrictions] for the API access

Paketdetails

beServe (Verwaltet)

« Zurück zur Liste: Installiertes Paket

Installiertes Paket – Details

Deinstallieren | Komponenten anzeigen | Hauptansprechpartner werden | Abhängigkeiten anzeigen

Paketname	beServe	Versionsnummer	x.x
Sprache	Deutsch	Nummer der zuerst installierten Version	1.5
Versionsname	x.x	Pakettyp	Verwaltet
Namespace-Präfix	beServe	API-Zugriff	Eingeschränkt [Einschränkungen deaktivieren]
Publisher	beDirect GmbH & Co. KG	Geändert von	Carolin Schroeder, 22.03.2018 06:28
Beschreibung			
Anweisungen nach Installation	Anzeigen		
Installiert von	Carolin Schroeder, 08.04.2016 12:59		
Auf Obergrenzen anrechnen	✓	Registerkarten	1
Anwendungen	1	Objekte	2

User permissions for using the app

Users need permission to read/modify objects selected for synchronization, and you must have permission to save beServe settings (CustomSettings).
In addition, you should have full access to BIPIDReferenz objects.
Furthermore, access to the object BIPIDReferenzen should be given by "Modify All" via the Permission Set. Without this permission, the content of the beServe tab may remain empty.

Permission Set Overview > Object Settings ▼ **BIPIDReferenzen** ▼

BIPIDReferenzen Edit

Object Permissions

Permission Name	Enabled
Read	✓
Create	✓
Edit	✓
Delete	✓
View All	✓
Modify All	✓

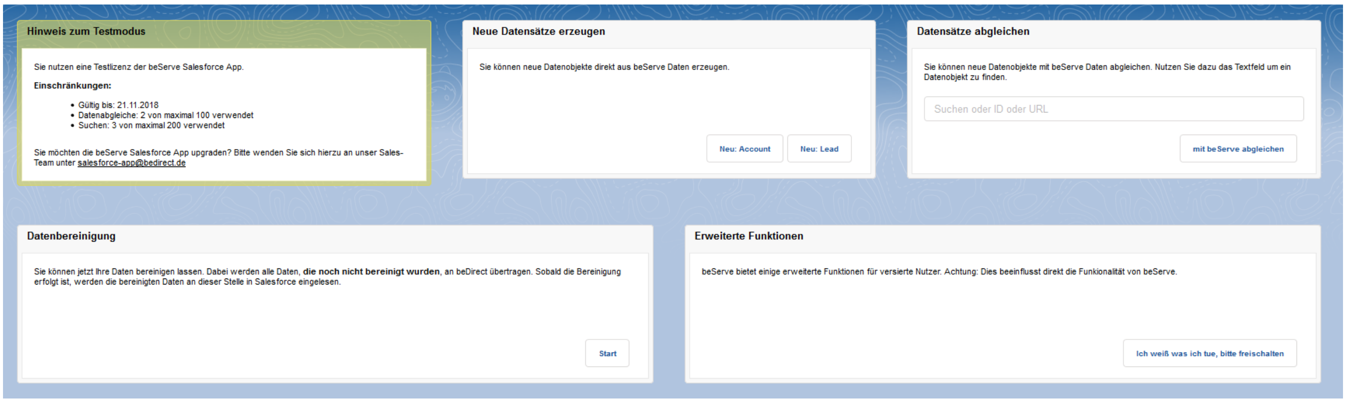
In addition, it may be necessary to assign additional access to the Visualforce Pages of beDirect via the Permission Sets.

Permission Set Overview > **Visualforce Page Access** ▼

Visualforce Page Access Edit

Visualforce Page Name	Installed Package
beServe.beServeClearing	beServe
beServe.beServeLogs	beServe
beServe.beServeNew	beServe
beServe.beServeNewAccount	beServe
beServe.beServeNewLead	beServe
beServe.beServePage	beServe
beServe.beServeRegister	beServe
beServe.beServeSettings	beServe
beServe.beServeTab	beServe
beServe.beServeUpdate	beServe
beServe.beServeUpdateAccount	beServe
beServe.beServeUpdateLead	beServe
beServe.beServeWelcome	beServe

After installation, you will be in test mode and be taken to the dashboard:



You will see the test mode note with a yellow border. Here, it is shown how long the account is still valid for. The status of reaching the data reconciliation and search limits is also displayed.
You can already create new data records and synchronise existing ones using the dashboard via Data records (accounts or leads).

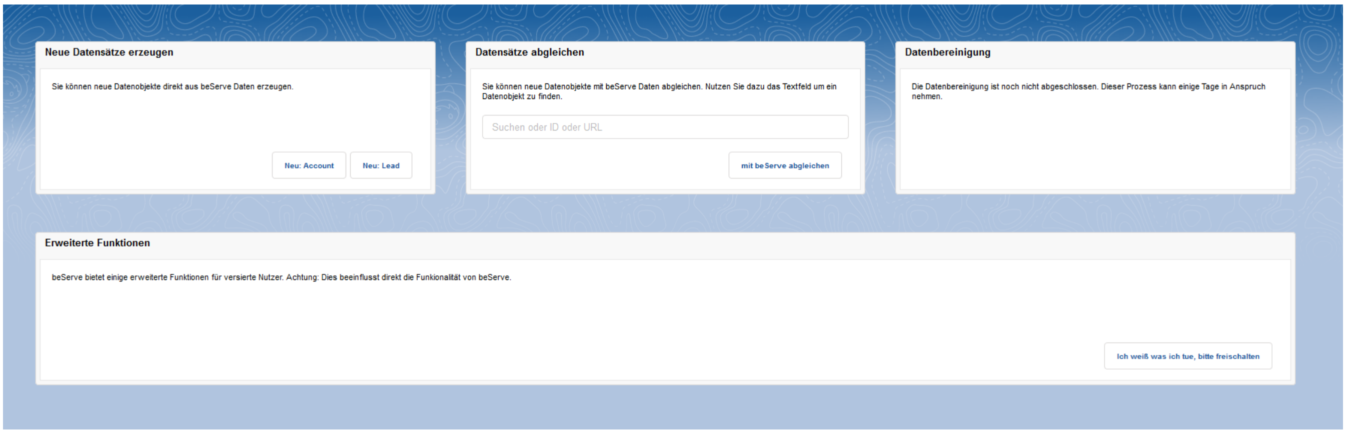
Using a custom URL

If a message appears that a "Content Security Policy" prevents the app from running: Please open the beServe tab, copy the URL from the top of the browser line and enter it in the secure domains.

Activating the full version

We will activate the full version once the contract has been concluded; you need to register on and log into Salesforce for this purpose.

You can tell that the version is licensed due to the changed dashboard:



Our beServe Salesforce app comes with pre-configured assignments:

Konfigurierte Zuweisungen

Die Felder in den gewählten Datentypen in Salesforce werden aus beServe gefüllt. Über die "Aktion" können Sie festlegen, ob Änderungen automatisch von beServe nach Salesforce übernommen werden sollen oder ob Sie diese erst prüfen und bestätigen möchten, wenn diese aus beServe kommen.

Datentyp	Feld	beServe Feld	Aktion	
Account	Account-Fax-Nummer	FAX_GESAMT	Anzeigen & ausgewählt	Entfernen
Account	Accountname	FIRMENNAME_GESAMT	Anzeigen & ausgewählt	Entfernen
Account	Accounttelefon	TELEFON_GESAMT	Anzeigen & ausgewählt	Entfernen
Account	BIPID	BIPID	Anzeigen & ausgewählt	Entfernen
Account	CompanyState	STATUS_ID_TEXT	Anzeigen & ausgewählt	Entfernen
Account	ID des übergeordneten Accounts	SFID_DIREKTE_MUTTER	Anzeigen & ausgewählt	Entfernen
Account	Jahresumsatz	UMSATZ_STAFFEL_MITTELWERT	Anzeigen & ausgewählt	Entfernen
Account	Mitarbeiter	MITARBEITER_STAFFEL_MITTELWERT	Anzeigen & ausgewählt	Entfernen
Account	PLZ (Lieferanschrift)	PLZ	Anzeigen & ausgewählt	Entfernen
Account	PLZ (Rechnungsanschrift)	PLZ	Anzeigen & ausgewählt	Entfernen
Account	Stadt (Lieferanschrift)	ORT	Anzeigen & ausgewählt	Entfernen
Account	Stadt (Rechnungsanschrift)	ORT	Anzeigen & ausgewählt	Entfernen
Account	Straße (Lieferanschrift)	STRASSE_GESAMT	Anzeigen & ausgewählt	Entfernen
Account	Straße (Rechnungsanschrift)	STRASSE_GESAMT	Anzeigen & ausgewählt	Entfernen
Account	Website	URL	Anzeigen & ausgewählt	Entfernen
Lead	BIPID	BIPID	Anzeigen & ausgewählt	Entfernen
Lead	CompanyState	STATUS_ID_TEXT	Anzeigen & ausgewählt	Entfernen

You will find further information on this matter on the following pages.

Field Assignments (Feldzuweisungen)

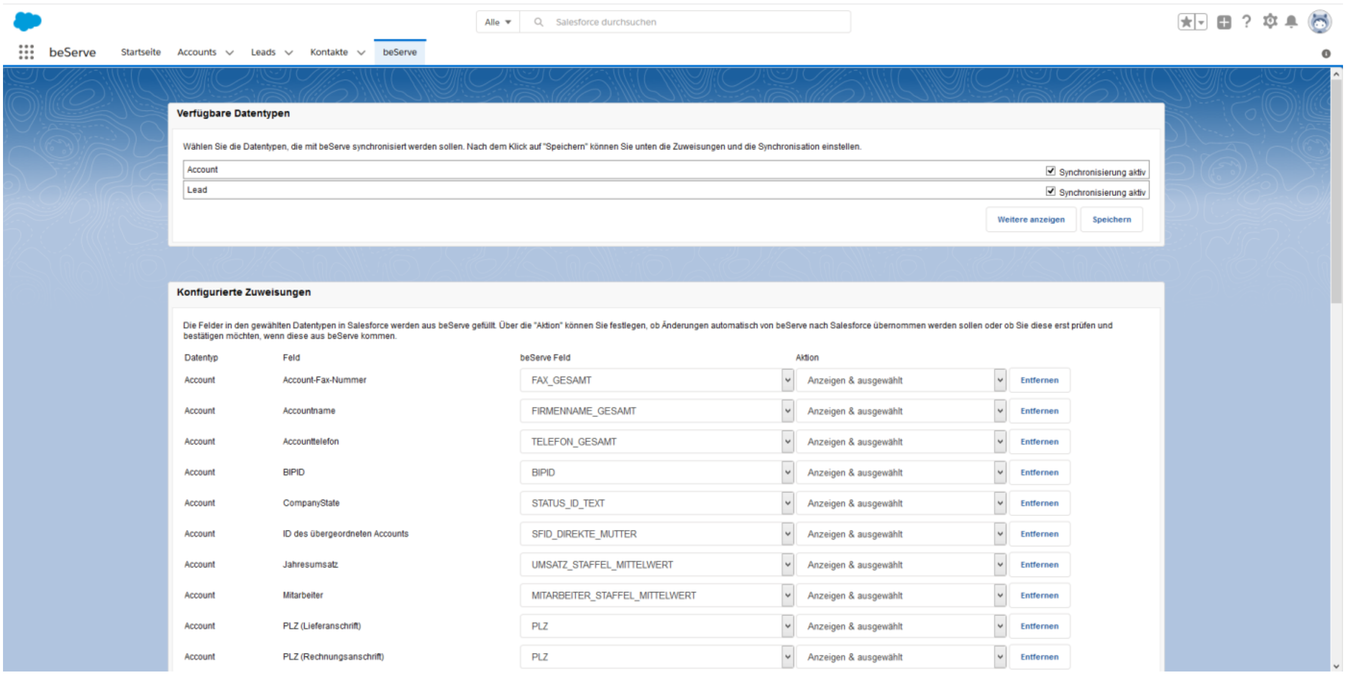
Now switch to the beServe tab.

For your features acquired with the data package, you can create your own custom objects or fields in Salesforce as appropriate. These are then compared by the beServe data retrieval (new and actual pull).

If you would like to compare your own custom objects or custom fields in Salesforce with beServe, click on the “Erweiterte Funktionen” button and then on the button [Ich weiß was ich tue, bitte freischalten]

then on the button [Feldzuweisungen]

The settings for the field assignments open:

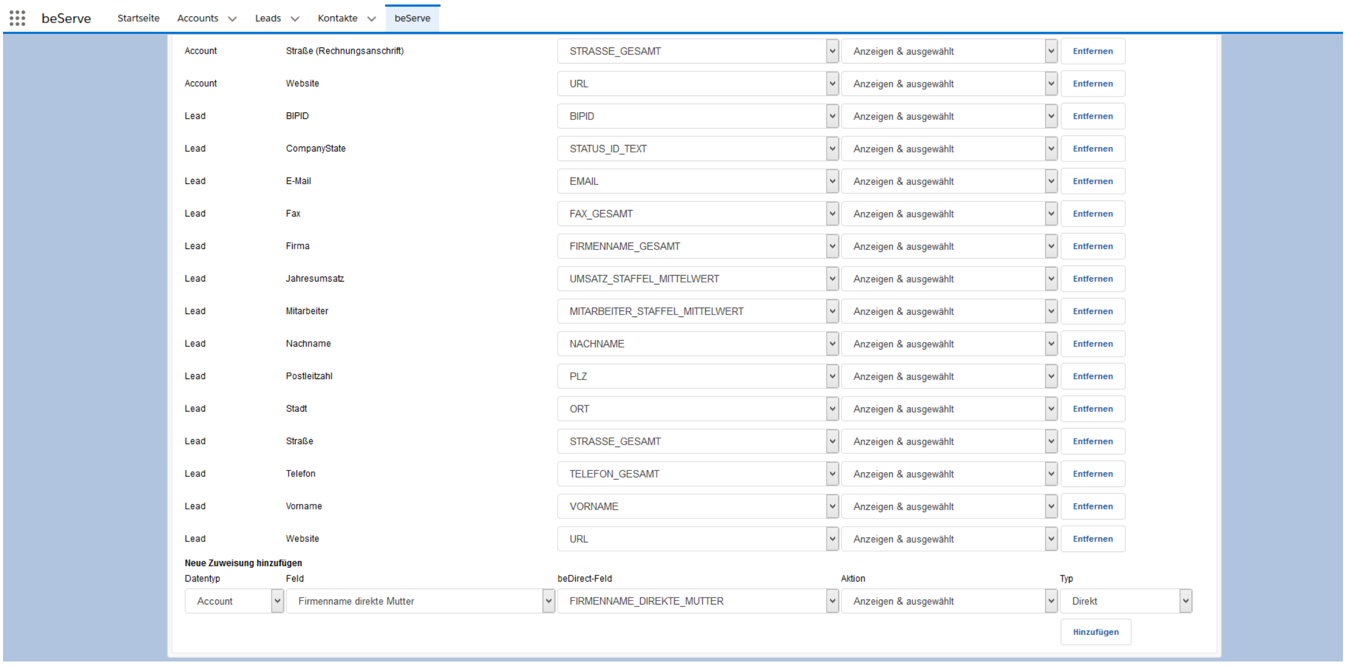


Here, select the data types which are to be filled by or synchronised with beServe. Then click on “Speichern”. The “Account” and “Lead” data types are pre-selected by default.

Note:
Please refer to the contract annex on the data package for the available data package features.

You will find a list with descriptions of the beServe fields in the field and format definitions, which are also part of your beServe contract.

You can then assign the individual fields to the selected data types:



On the left-hand side, you will see the data types in Salesforce and, next to them, the field in beServe which corresponds to the field in your Salesforce objects.

You can choose from the following possibilities as an “Aktion”:

- “Anzeigen & ausgewählt”: If a change is detected in the beServe data when compared to the data in your Salesforce, this change is displayed in a list and the option to adopt the change from beServe to Salesforce is already ticked. If you would not like to adopt this change to the field, you must untick the changed data in the list during the comparison.
- “Anzeigen & nicht ausgewählt”: If a change is detected in the beServe data when compared to the data in your Salesforce, this change is displayed in a list and you can confirm that this changed data should overwrite your data in Salesforce (data changes must be approved).
- “Automatisch übernehmen”: Changes to the data in beServe are adopted to the relevant fields in Salesforce without the changed data being displayed to you.

You can completely remove a field assignment in beServe to a field in your Salesforce using the “Entfernen” button. This does not cause existing data in your Salesforce to be deleted, but it is no longer compared if there are changes.

There is no need to save the changed assignments here; they are always saved automatically when the assignments are edited.

With the “Neue Zuweisung hinzufügen” option, you can add another link between a field from beServe to a field in your Salesforce. This can be done using the “Direkt” type or using “Nachschlagen”. You can use a reference in an object with the “Nachschlagen” option.

“Nachschlagen” sample application:

You would like to show the industry sector codes (e.g. 6311) with the sections presented and separated by full stops (J63.11). We call this “WZ deStatis”. To do this, you use an “eigenes Custom Object” with the codes’ reference to one another.

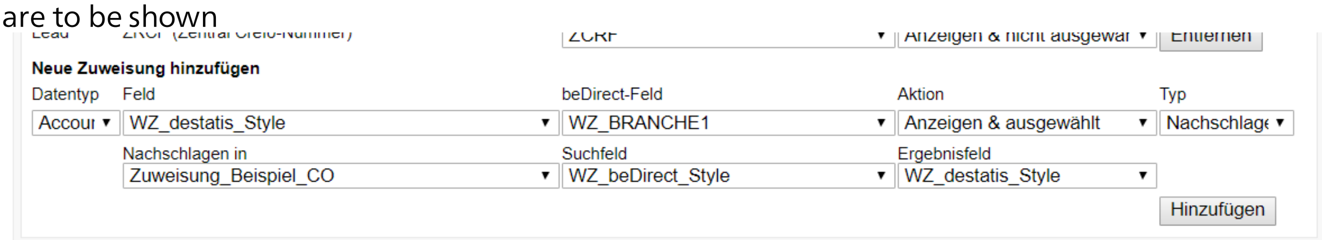
- Mapping reference

WZ_deStatis_Style__c	WZ_beDirect_Style__c
J63.11	6311
M73.11	7311
M73.2	732

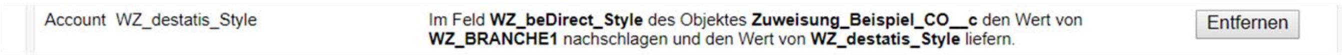
Refresh Grid Access in Salesforce: Create New

- “Neue Zuweisung hinzufügen“
  - Select a data type, here: Account
  - Feld wählen, hier: WZ_destatis_Stlye, das Feld aus Account in dem die Inhalte “WZ deStatis“ angezeigt werden sollen
  - beDirect field, here: WZ_BRANCHE1, i.e. the field which comes over the beServe interface and corresponds to beDirect’s industry sector codes in the mapping reference
  - Action, here: “Anzeigen & ausgewählt“
  - Type, here: “Nachschlagen“, only then do the options below open
  - “Nachschlagen” in, here: Zuweisungs_Beispiel_CO. This is the “Own custom object” with the mapping reference
  - Search field, here: WZ_beDirect_Style, i.e. the field which comes from your “Own custom object” and corresponds to beDirect’s Industry sector codes mapping field in the mapping reference

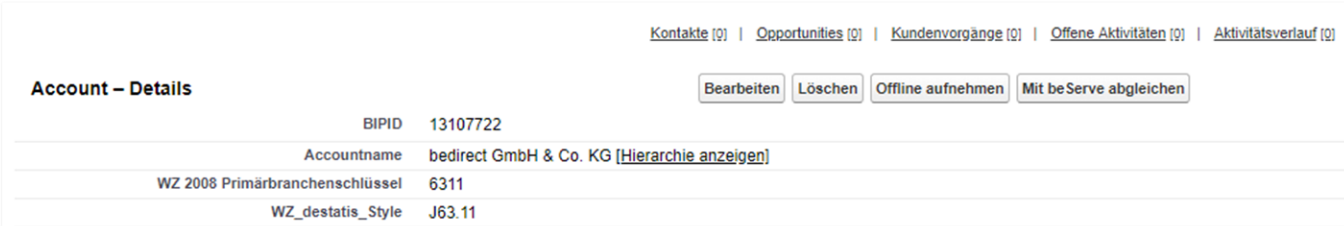
Result field, here: WZ_destatis_Style, i.e. the field from Account in which the “WZ deStatis” contents are to be shown



- Save the assignment using “Hinzufügen”.



- The assignment is saved and can now be used.
- The next time a new account is created or an existing one is updated, during suitable mapping the contents are written to the relevant field.

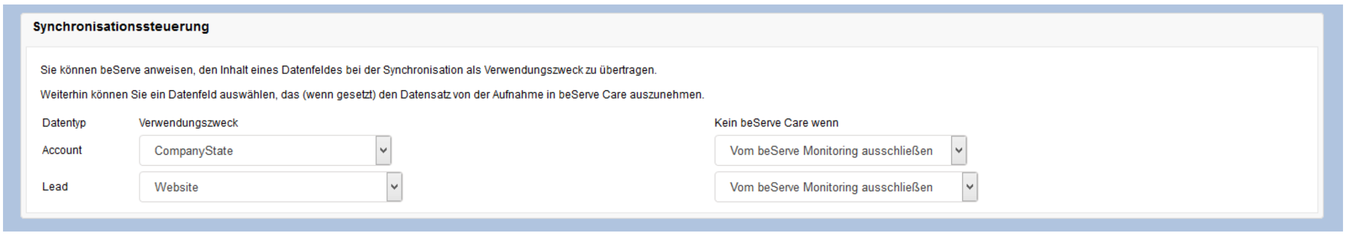


Synchronization Control (Synchronisationssteuerung)

With the “Synchronisationssteuerung”, you can define

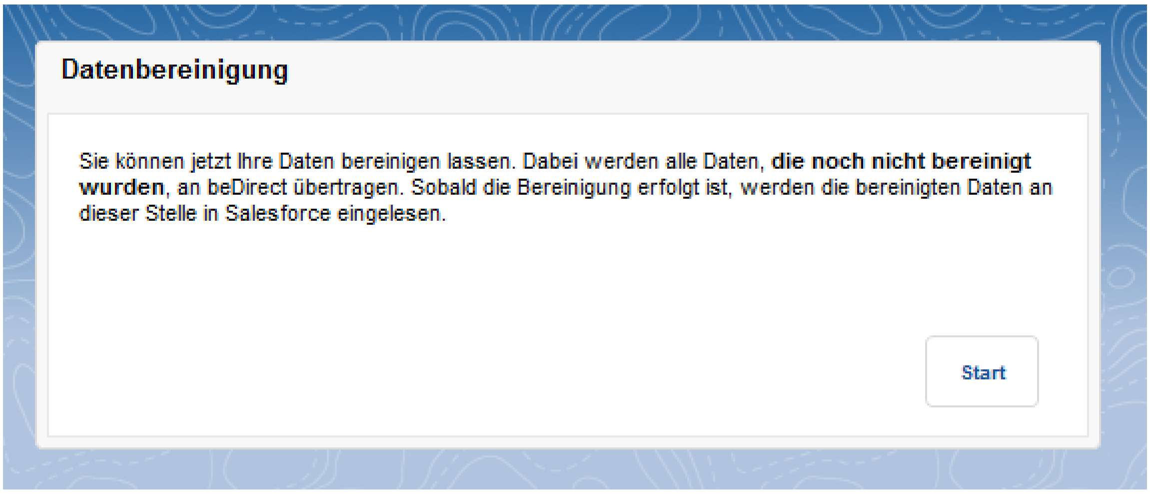
- whether company hierarchies and accounts belonging to a hierarchy tree should be created automatically, provided that data package is licensed in beServe. The detailed description is available separately.
- what data should be transmitted as purpose 1
- and/or should be excluded by beServe Care Monitoring during the search and manual comparison of individual data records from Salesforce.

Not allowed in test mode; this only works in the full version



When a data record is retrieved from beServe, the data is automatically adopted into beServe Care Monitoring (if contractually agreed). If you would like to control this yourself, you can do so using the “Kein beServe Care wenn” setting: If the selected field is filled here, the retrieved data record is not automatically adopted into beServe Care Monitoring.

If you have commissioned initial data cleaning (beProfile), you can trigger it using the "Start" button:



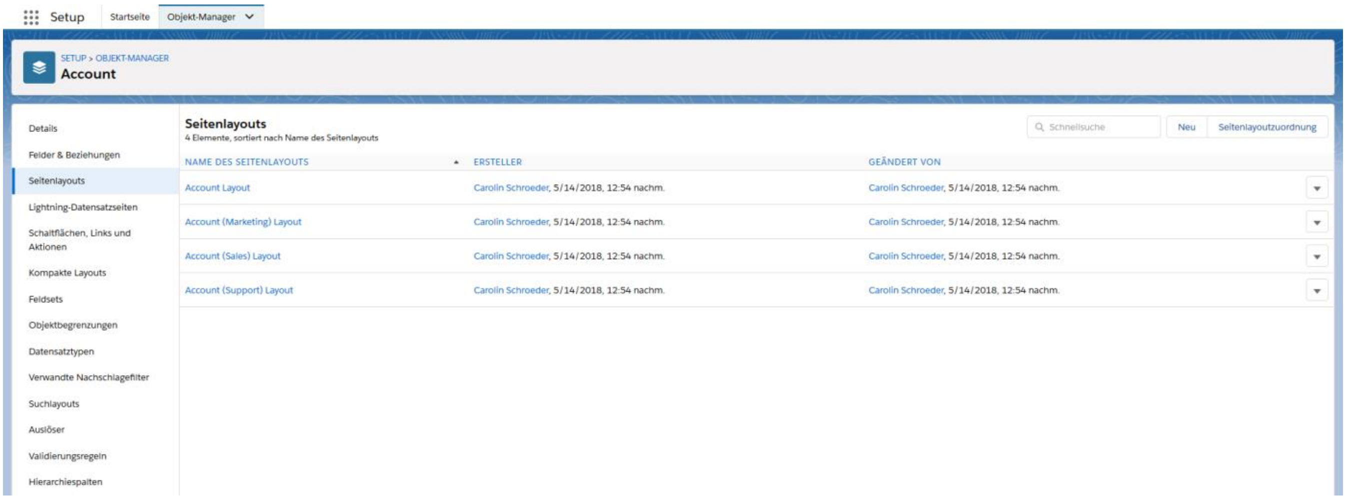
Click on "Start" so that your existing addresses are sent to us for checking.

Please remain in the beServe tab until the process step is complete (blue progress bar is shown). At this point, the data is prepared from Salesforce and sent to our secure server.

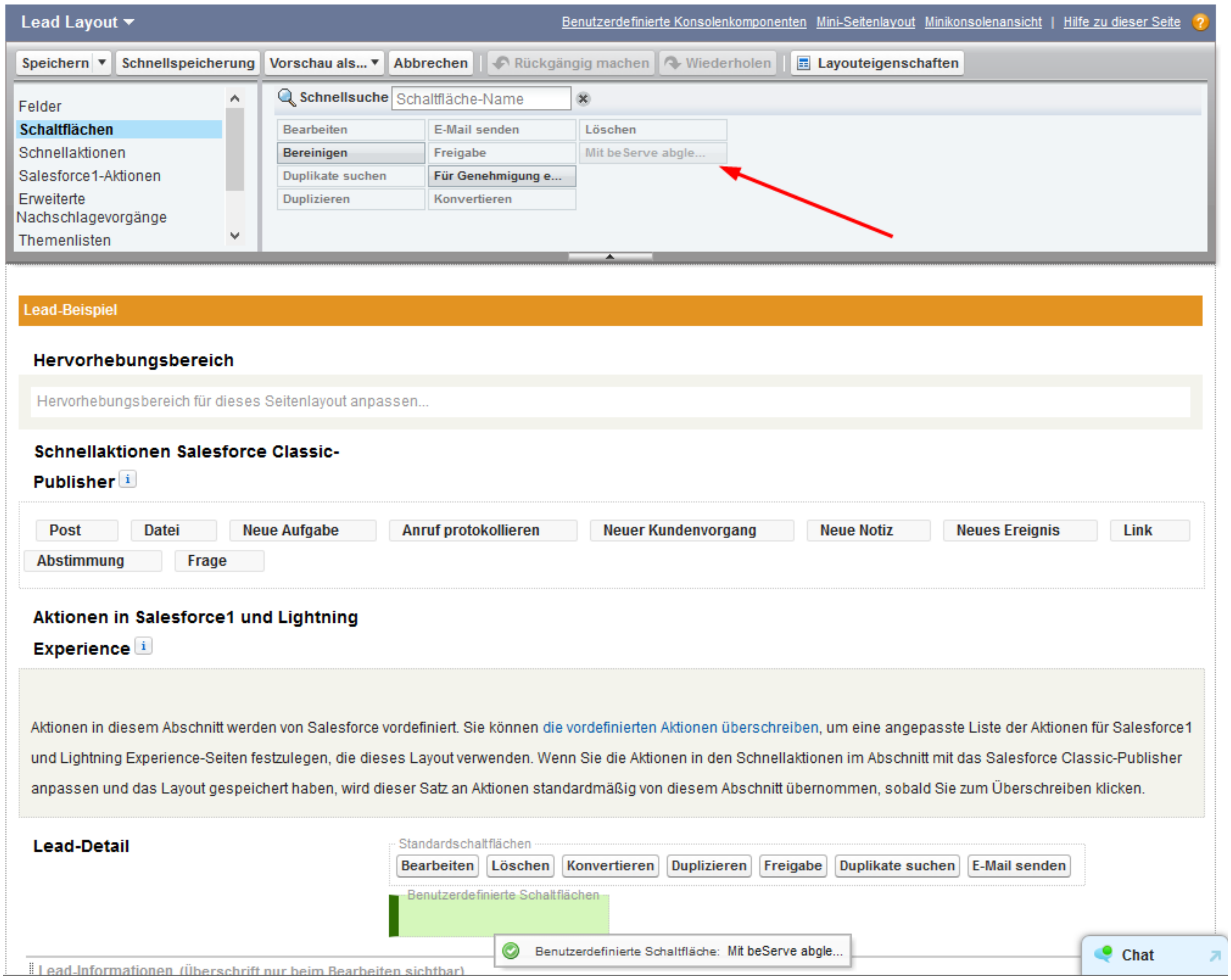
Following the clean-up, we will let you know that the data has been checked and corrected so that you can read it back into your Salesforce.

3 Integrating Buttons and fields in Salesforce

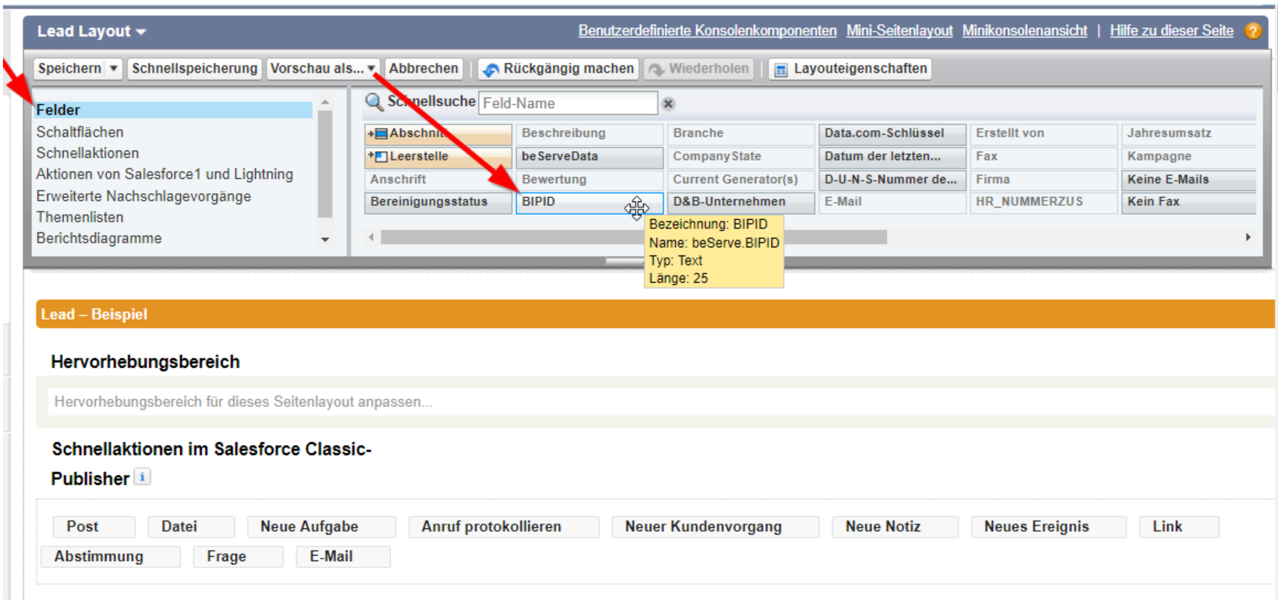
In Setup, go to Setup -> Objektmanager -> Lead -> Seitenlayouts and then click on “Bearbeiten” for one of the layouts where you would like to add the manual beServe compare button and the beServe fields:



Now drag the “Mit beServe abgleichen” button into the area for the “Benutzerdefinierten Schaltflächen”:



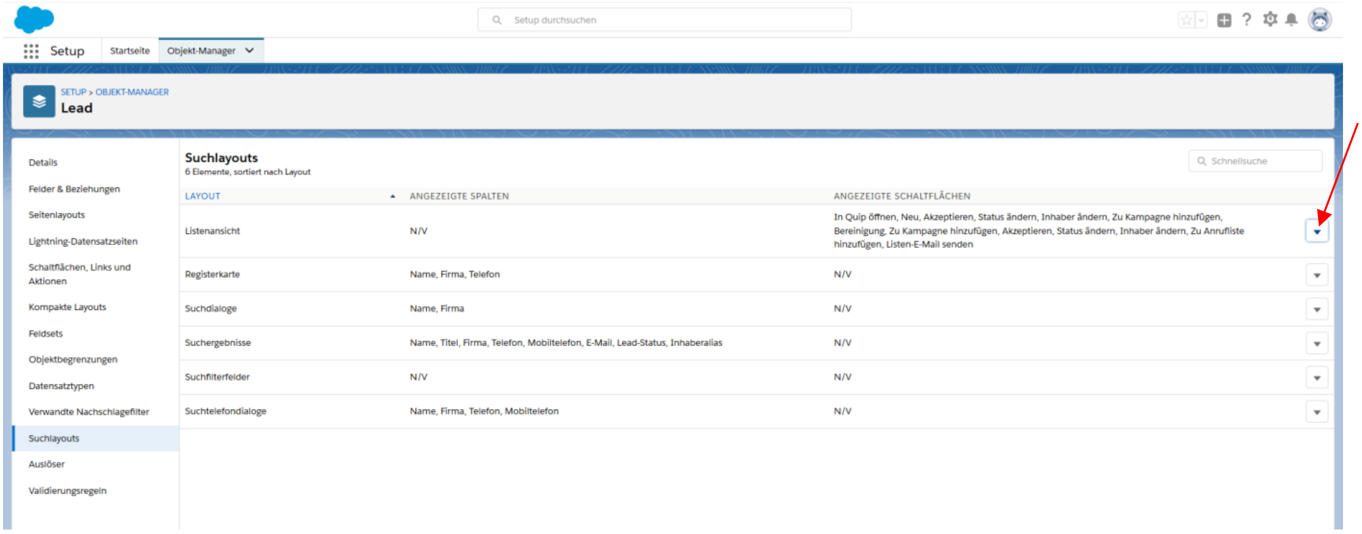
Switch to the “Felder” selection and, if desired, add the fields like “BIPID” and/or “CompanyState” (for the beServe company status) to the page layout:



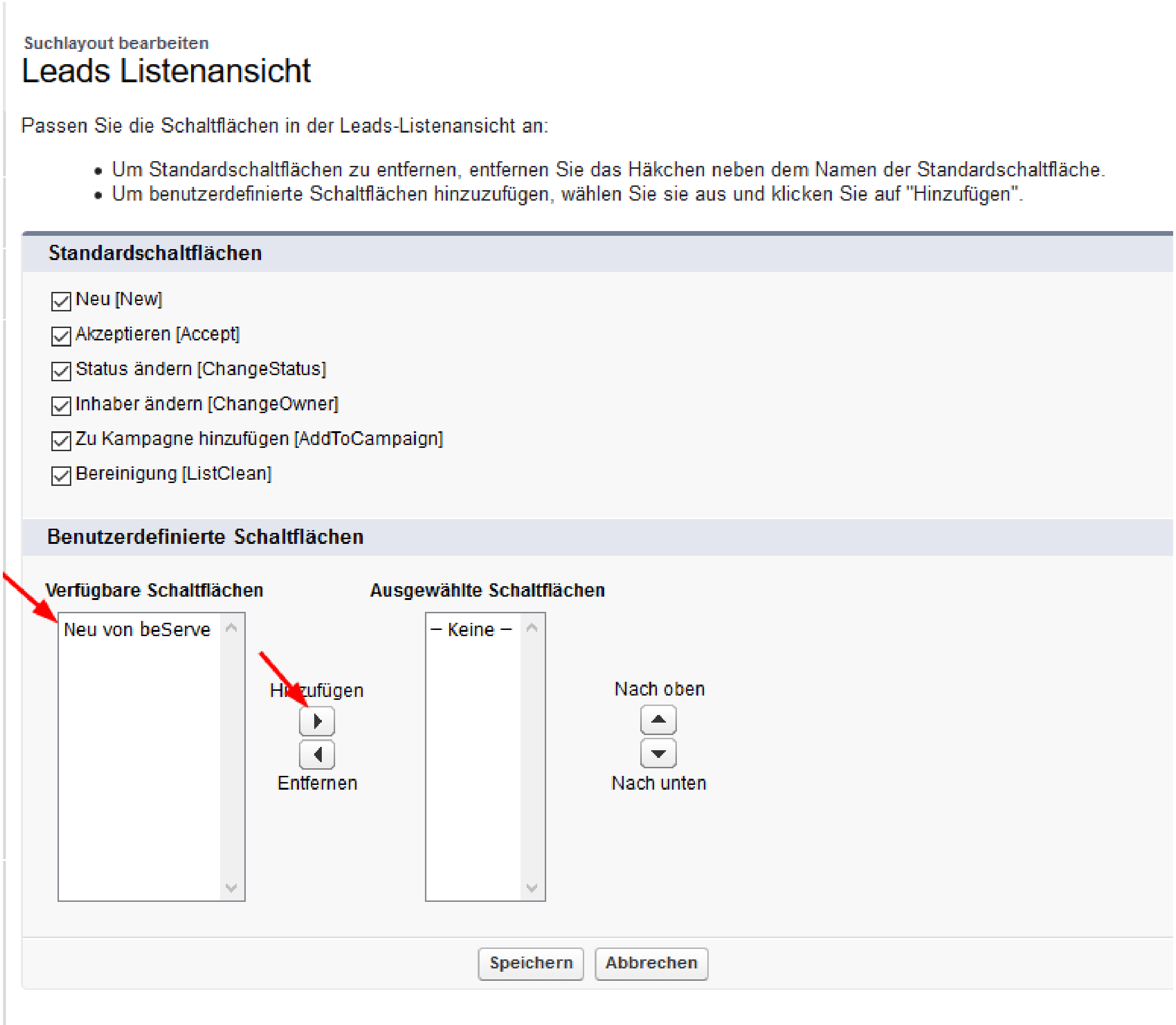
Save the layout and repeat these steps for all the desired lead layouts.

In Setup, open -> Objektmanager -> Account -> Seitenlayouts and repeat the steps described above for the account layout pages where the “Mit beServe abgleichen” button should be added.

Open Setup -> Objektmanager -> Lead -> Suchlayouts and click on “Bearbeiten” in “Leads-Listenansicht”:



In “Verfügbare Schaltflächen”, select the “Neu von beServe Serve” one and add it to the “Ausgewählten Schaltflächen” by clicking on “>”:

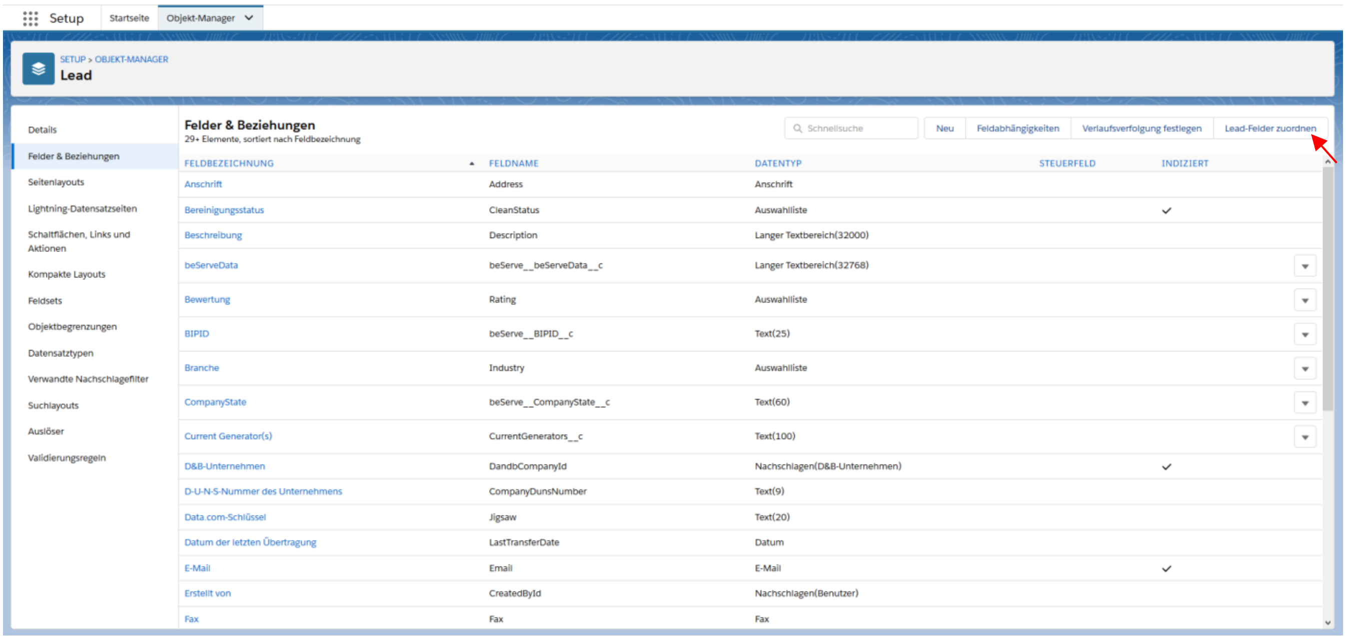


Save the change.

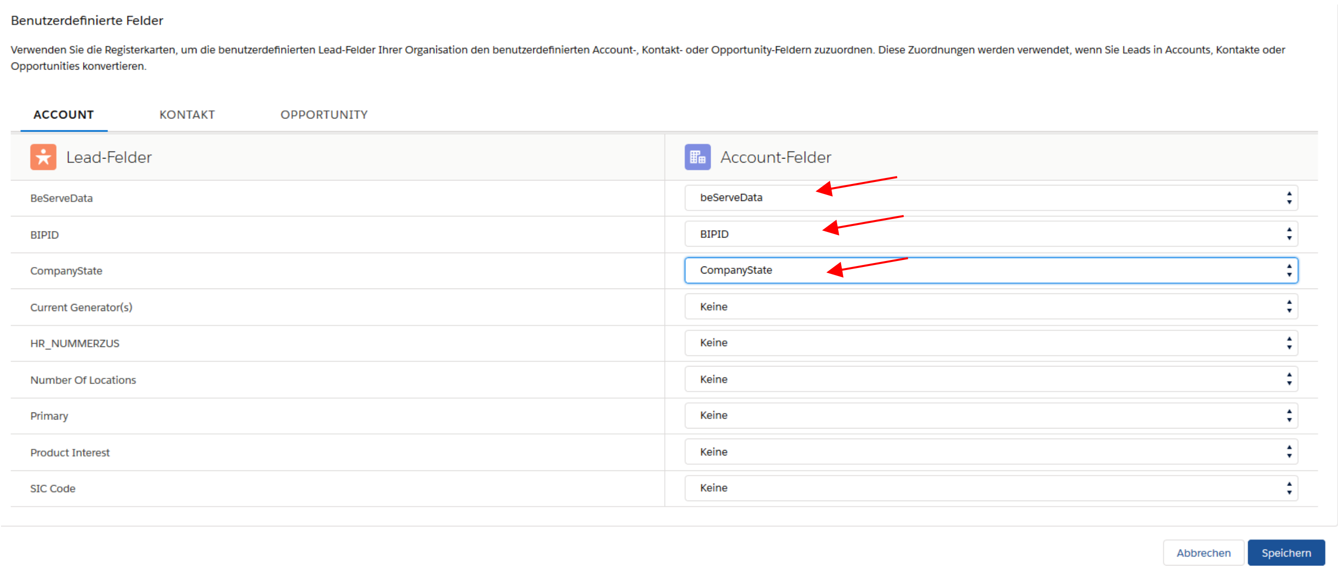
Repeat this for Accounts -> Suchlayouts to also add the “Neu von beServe” button to the accounts list.

Field assignment for lead conversion

To keep the link to the fields when converting leads to accounts, some fields need to be assigned to the lead settings.
To do this, please follow the steps below:
Open Setup -> Objekt-Manager -> Lead -> Felder & Beziehungen Felder and click on the "Lead-Felder zuordnen" button further down.



Select the account fields in the next window so that the entries are identical to those in the lead fields and save the change:



4 Further settings

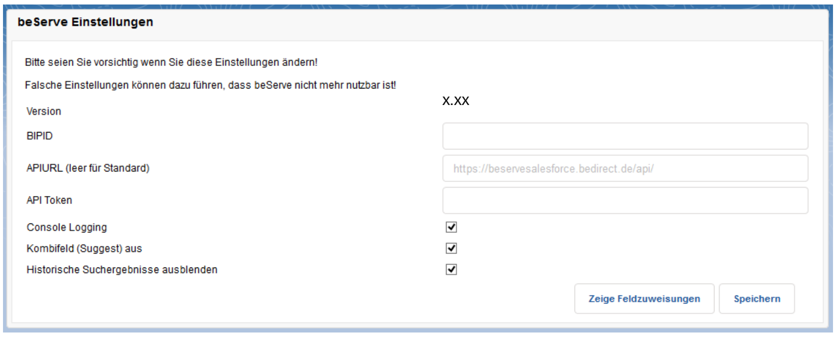
Further settings can be made in the beServe tab:

- beServe Einstellungen (beServe settings)
- Feldzuweisungen (field assignments)
- Log-Einträge (log entries)

beServe settings

The [Einstellungen] button takes you to the beServe settings.

ATTENTION: Please only make settings here according to beDirect instructions.



Field name	Description
Version	Displays your currently installed beServe Salesforce App version
BIPID	Your BIPID
APIURL	Shows which beServe Salesforce middleware user management your app is connected to.
API Token	Unique key for use and connection with our systems
Console Logging	Possibility to activate extended log entries
Kombifeld (Suggest) aus	If this option is enabled, the beDirect-Einfeld-Suche (single-field search) proposal list displays only suggestions for company names.
Historische Suchergebnisse ausblenden	If this checkbox is activated, historical addresses in the beDirect-Einfeld-Suche (single-field search) proposal list and in the beServe hit list are hidden.

Feldzuweisungen (field assignments)

The setting options can be found at the top of the document under **Field Assignments (Feldzuweisungen)**

Log-Einträge (log entries)

After you have activated console logging, beDirect can request log entries from you to identify issues, or you can use these messages to identify detailed technical questions that may arise.

beServe Log-Einträge

Datum	Kategorie	Nachricht	Objekt
	(alle)	Suchtext	Objekt-ID
25.2.2019, 12:43:46	debug	Reported all deleted objects	
25.2.2019, 12:43:46	debug	doReportDeleted Lead 0 100 2019-02-25T11:35:59.058Z	
25.2.2019, 12:43:46	debug	doReportDeleted Account 0 100 2019-02-25T11:35:58.989Z	
25.2.2019, 12:43:45	debug	reportDeleted	
25.2.2019, 12:35:59	debug	Reported all deleted objects	
25.2.2019, 12:35:59	debug	doReportDeleted Lead 0 100 2019-02-25T11:35:49.380Z	
25.2.2019, 12:35:59	debug	doReportDeleted Account 0 100 2019-02-25T11:35:49.316Z	
25.2.2019, 12:35:59	debug	reportDeleted	
25.2.2019, 12:35:49	debug	Reported all deleted objects	
25.2.2019, 12:35:49	debug	doReportDeleted Lead 0 100 2019-02-25T11:34:29.244Z	

5 Support and contact

Please do not hesitate to contact us if you have any questions.

beDirect GmbH & Co. KG
Carl-Bertelsmann-Straße 161 S
33311 Gütersloh
Phone:+49 5241/ 80 456 88 (Mon to Thurs: 8 am to 4 pm and Fri: 8 am to 2 pm)
Fax: +49 5241/ 80 456 99
email: beserve@bedirect.de
Web: www.bedirect.de

6 Document history

Version	Creation	Author	Change
1.0	18/05/2016	Carolin Schroeder	Draft version adapted to the new layout
1.1	11/11/2016	Carolin Schroeder	Lead field assignment setting for BIPID
1.2	09/02/2017	Carolin Schroeder	Instructions adapted to the new layout
1.3	23/08/2017	Carolin Schroeder	Field assignment extension for lead conversion
1.4.	03/01/2018	Carolin Schroeder	Instructions adapted to the new layout
1.5	17/01/2018	Christoph Bünger	Extension to include field assignments
1.6	18/01/2018	Carolin Schroeder	Adjustments for version 2.5
1.7	07/02/2018	Carolin Schroeder	Adjustments for version 2.15
1.8	01/03/2018	Carolin Schroeder	Adjustments for version 2.17
1.9	17/04/2018	Carolin Schroeder	Adjustments for version 2.23
2.0	15/05/2018	Carolin Schroeder	Adjustments for version 2.32
2.1	20/06/2018	Carolin Schroeder	Adjustments for version 2.39
2.2	14/11/2018	Carolin Schroeder	Adjustments for version 2.48 Classic UI
2.3	28/02/2019	Carolin Schroeder	Adjustments for version 2.66
2.4	19/07/2019	Carolin Schroeder	Adjustments for version 2.83
2.5	19/11/2020	Carolin Schroeder	Adjustments for version 2.90 – Custom URL
2.6	08/10/2024	Carolin Schroeder	Update address