Felixio Data Completeness Monitor

Installation & Post-Installation Guide

This document explains how to install the Felixio Data Completeness Monitor package and complete the required setup so the application is ready to use.

This guide is intended for **Salesforce Administrators and Implementation Teams**.

1. Package Installation (via Salesforce AppExchange)

1. Open Salesforce AppExchange and search for your app name (e.g., **Felixio Org Audit**).
2. Click **Get It Now** on the AppExchange listing.
3. Log in using the Salesforce org where you want to install the package.
4. Select the installation environment:
   - **Install in Production** (for live orgs)
   - **Install in Sandbox** (for testing)
5. Review the package details and click **Install Here**.
6. Choose **Install for All Users** (recommended).
7. If prompted, check the box:

   "I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program."

8. Click **Install**.

9. Wait for the installation to complete. Salesforce will send an **email confirmation** once the installation is finished.

2. Assign Permission Sets

After installation, users must be assigned the appropriate permission set.

Available Permission Sets

- **Felixio_Data_Completeness_Monitor_Admin**
  → For administrators who configure objects, fields, enforcement, and settings.

- **Felixio_Data_Completeness_Monitor_User**
  → For users who only view dashboards, charts, and completeness scorecards.

Steps to Assign Permission Sets

1. Go to **Setup** (⚙️ icon in the top-right corner).

2. In the Quick Find box, search for **Permission Sets**.

3. Click **Permission Sets**.

4. Select the required permission set:

    - Felixio_Data_Completeness_Monitor_Admin
      or

    - Felixio_Data_Completeness_Monitor_User

5. Click **Manage Assignments**.

6. Click **Add Assignments**.

7. Select the users.

8. Click **Next** → **Assign**.

Verify that users appear under the **Assigned Users** section.

3. Configure External Client App (Required for OAuth Access)

After assigning permission sets, the Admin must configure the External Client App to allow authentication and associate a username

Steps to Configure External Client App

1. Go to **Setup** (⚙️ icon in the top-right corner).
2. In the **Quick Find** box, search for:
   External Client Apps
3. Click **External Client Apps** from the results.
4. From the list, find and click the app named:
   Data Completeness Monitor
5. Click **Edit Policies** (or **Edit** under Policies section).

Enable OAuth Settings

6. Scroll to the **OAuth Policies** section.
7. Enable the following options:
   - **Enable Client Credentials Flow** under OAuth Flows and External Client App Enhancements

Assign Username for Testing

8. Locate the field:
   Run As (Username)
9. Enter the Salesforce **username of the user** who should run/authenticate this app.
10. Click **Save**.

4. Launch the Application

1. Go to the **App Launcher**.
2. Search for **Data Completeness**.
3. Open the **Data Completeness app**.

At this stage, the app is installed but **will not show any data until configuration is completed**.

5. Required Post-Installation Setup

This setup must be completed by an **Admin user** before dashboards and features become functional.

5.1 Create Data Completeness Configuration

1. Open the **Data Completeness Configuration** tab.
2. Click **New Configuration**.
3. Select an object (e.g., Account, Contact, Lead).
4. Add fields and assign weights.
5. Mark the configuration as **Active**.
6. Click **Save**.

Without at least one active configuration, the Home dashboard will not display any completeness data.

6. Optional UI Setup – Add Completeness Scorecard to Record Pages

To show record-level completeness to users:

1. Open any record (e.g., Account).
2. Click ⚙️ → **Edit Page**.
3. In Lightning App Builder, locate **RecordDetailPageScorecard**.
4. Drag and drop it onto the page.
5. Click **Save**.
6. Click **Activate** (if prompted).

This allows users to see completeness directly while working on records.

7. Installation Complete

Your application is now ready for use.

- Admins can manage configurations and enforcement
- Users can view dashboards and completeness insights
- Scorecards guide users to improve data quality
- Live validation ensures cleaner data at entry time

Important Note

This document covers **installation and setup only**.
For detailed feature usage, configuration steps, and dashboard explanations, refer to the separate:

📘 **Felixio Data Completeness Monitor – Walkthrough Guide**