GUS CONNECTOR INSTALLATION GUIDE

Automate and Verify Polish Company Data in Salesforce with GUS Connector

GUS Connector

Installation Guide

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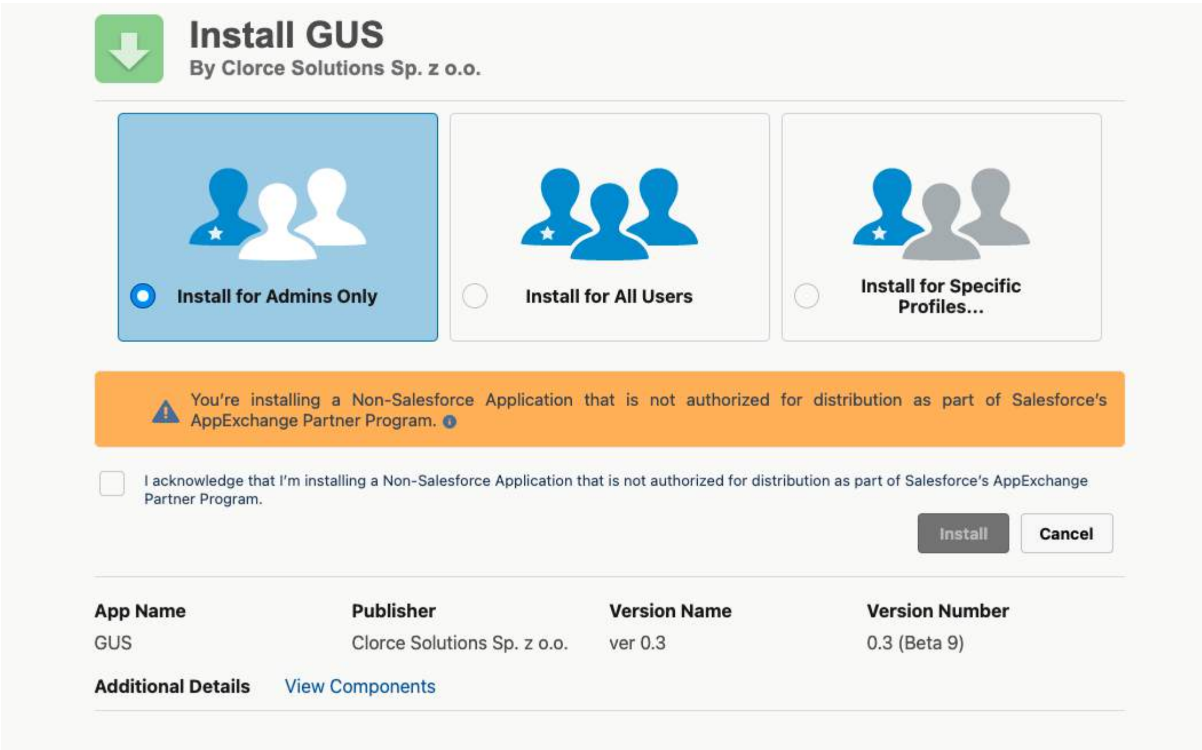
The **GUS Connector** application is designed to fetch company information from the GUS database using NIP or REGON numbers and create corresponding records for Leads or Accounts in the Salesforce system. GUS Connector also allows for single and mass updates of these records based on the GUS database. The following instructions are prepared for the individual installing the application, who must have broad administrative rights (we recommend the **System Administrator** profile).

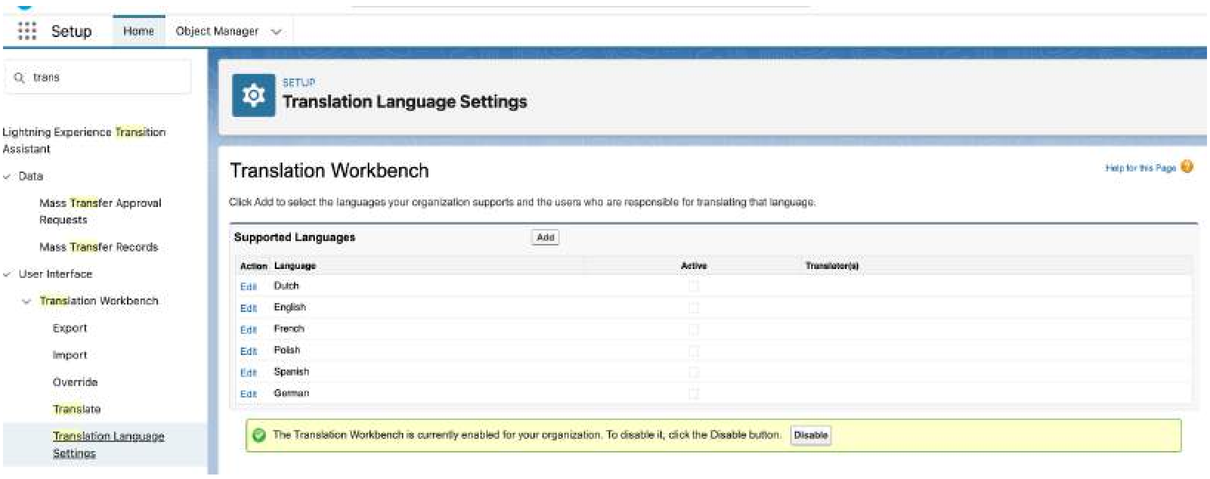
Plugin Installation

1. **Install the Package**: Download it from AppExchange – installation preferred for Admins.



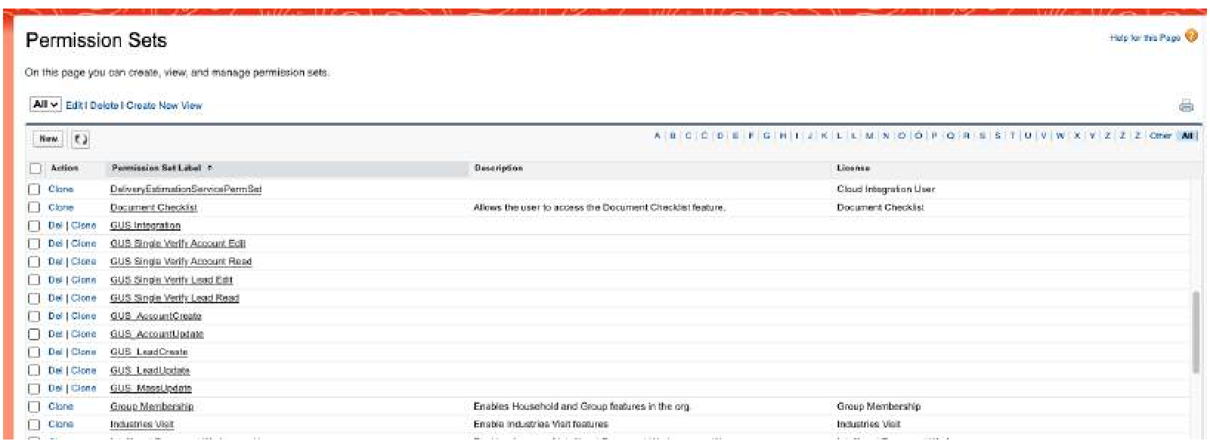
2. Verify if translations are enabled in the environment where the plugin is being installed. If not, enable them:

- Go to **Settings/Setup** → **Translation Language Settings** and check if translation functions are available.



3. Assign appropriate **Permission Sets** to Users. In the **Permission Sets** section, assign users the relevant permissions from the list:

- **GUS_AccountCreate**: For creating Account records based on data retrieved from GUS via the Back Office GUS Plugin.
- **GUS_AccountUpdate**: For updating single Account records with GUS data using the Back Office GUS Plugin.
- **GUS_LeadCreate**: For creating Lead records based on data retrieved from GUS via the Back Office GUS Plugin.
- **GUS_LeadUpdate**: For updating single Lead records with GUS data using the Back Office GUS Plugin.
- **GUS_MassUpdate**: For performing mass updates on both Account and Lead records.
- **GUS_Single_Verify_Account_Edit**: For Read/Write access to Account record fields for the single verification component.
- **GUS_Single_Verify_Account_Read**: For Read-only access to Account record fields for the single verification component.
- **GUS_Single_Verify_Lead_Edit**: For Read/Write access to Lead record fields for the single verification component.
- **GUS_Single_Verify_Lead_Read**: For Read-only access to Lead record fields for the single verification component.

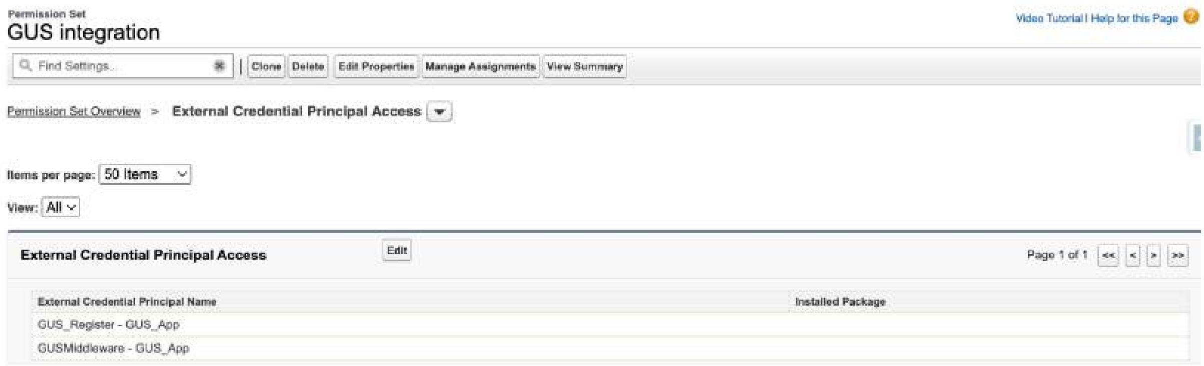


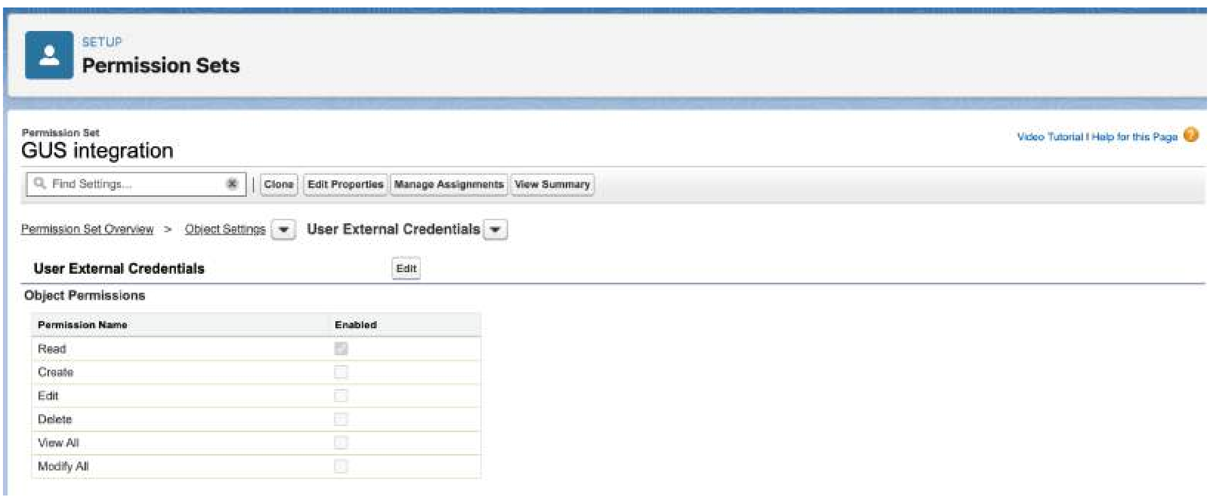
IMPORTANT:

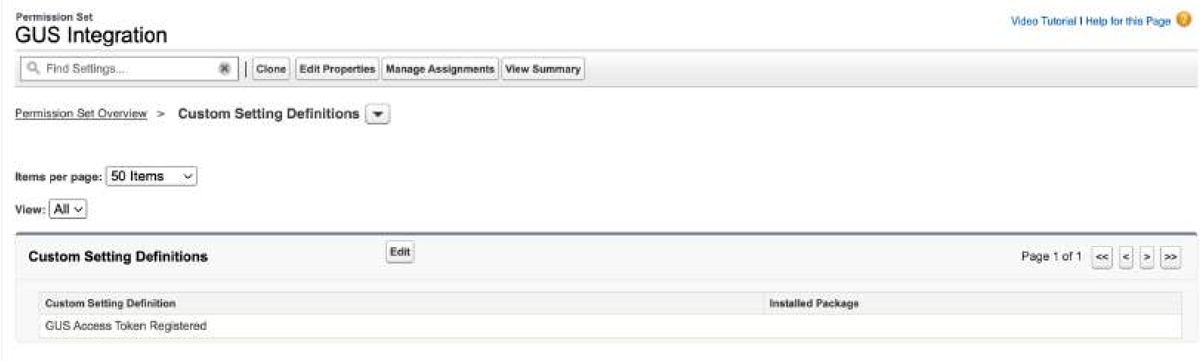
Without appropriate Organization Wide Defaults (OWD) permissions, users may still lack the ability to create records. For the selected object, you must grant Create access within OWD or via Sharing Rules. Additionally, access to create specific Record Types must be granted to selected users. This can be done via Profiles or Permission Sets. Record Types may differ between environments and must be addressed independently of the GUS Connector application permissions (also via Profiles and Permission Sets in the Record Type Settings section).

4. Create an additional **Permission Set** (Setup → Users → Permission Sets → New) with the following settings:

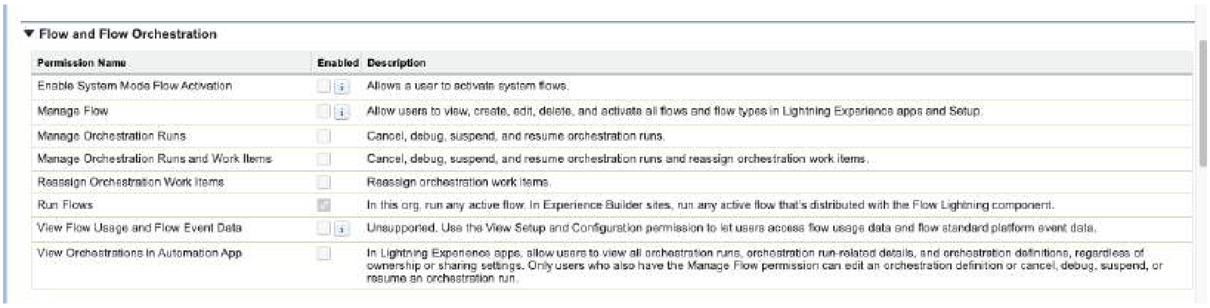
- Under **External Credential Principal Access**, add GUSMiddleware - GUS_App i GUS_Register - GUS_App.
- Under **Object Settings**, in **User External Credentials**, check **Read**, **Create**, **Edit**,
- In the **Custom Settings Definitions** section → add b_gus.**GUS Access Token Registered**.







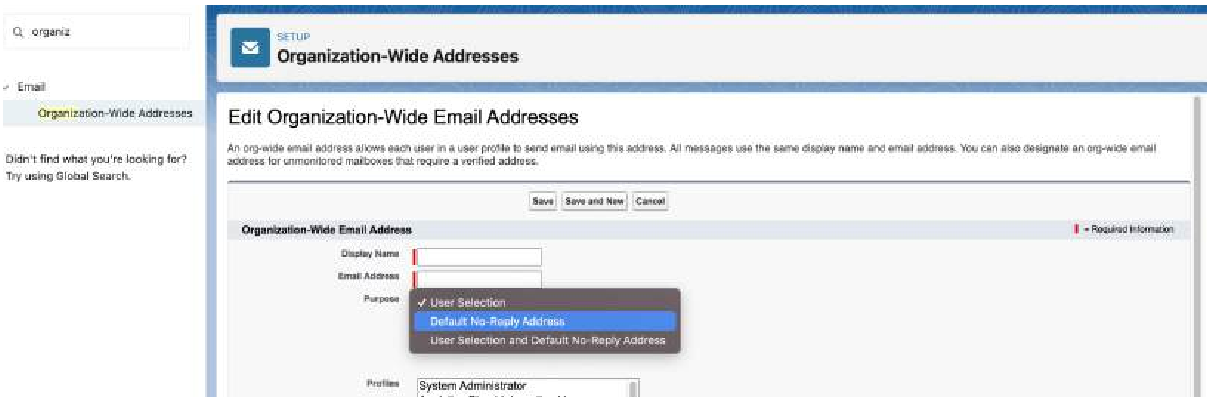
- If the user lacks the Run Flows permission, enable it under **App Permissions** in the **Flow and Flow Orchestration** section.



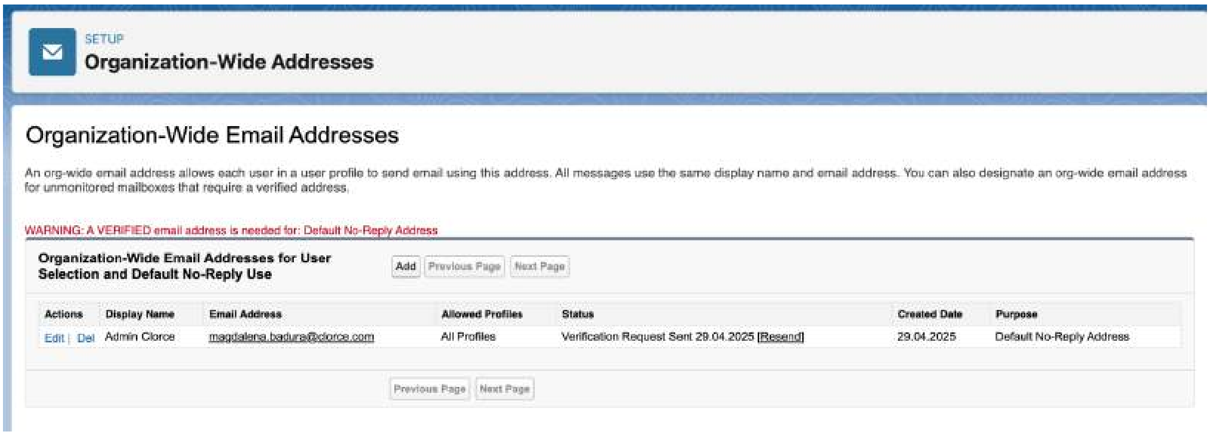
Assign this Permission Set to all users who will be using the application.

5. You need to check if an email address has been added in the **Organization-Wide Addresses** section. It must be verified and set as a **no-reply** address.

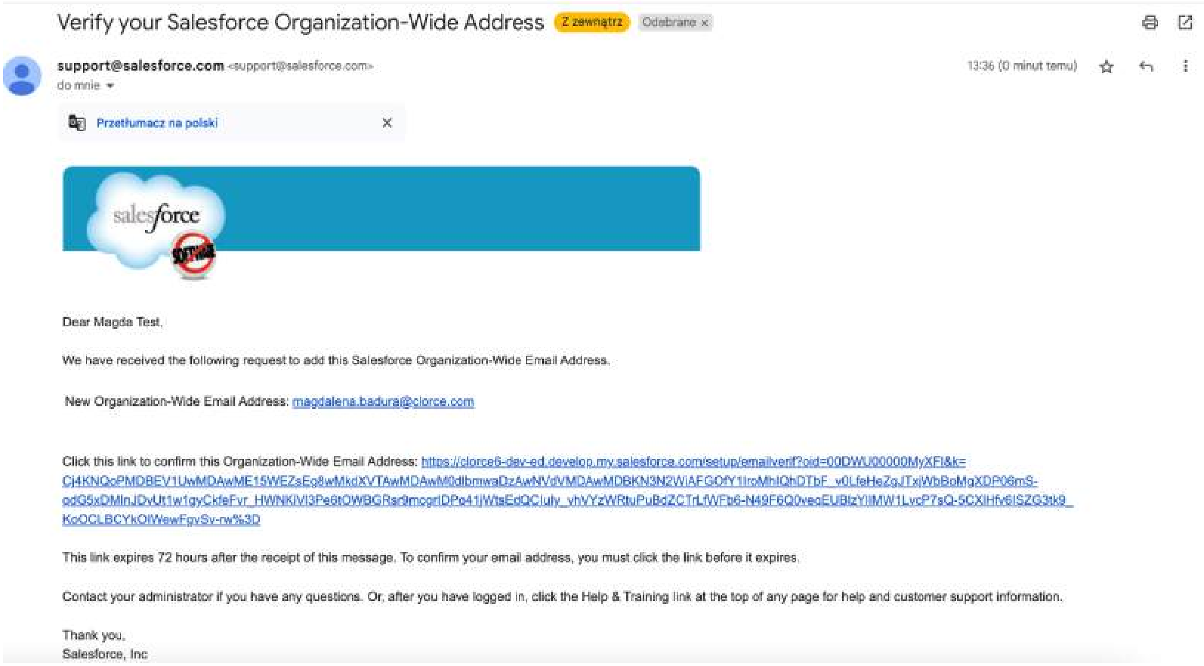
   Go to **Setup** → **Organization-Wide Addresses**, and add the email address by clicking the **Add** button.



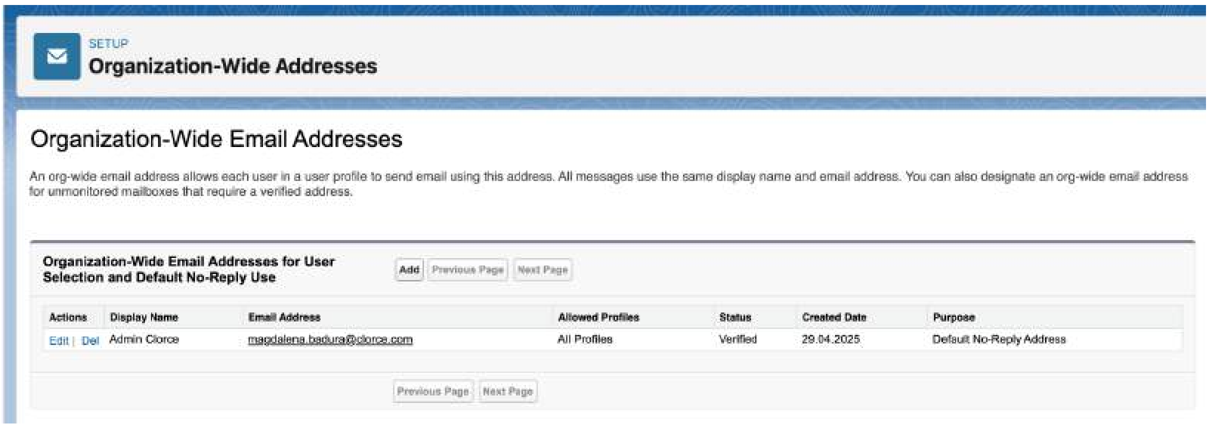
Enter the name and email address, select **Default No-Reply Address** from the list, and click **Save**.



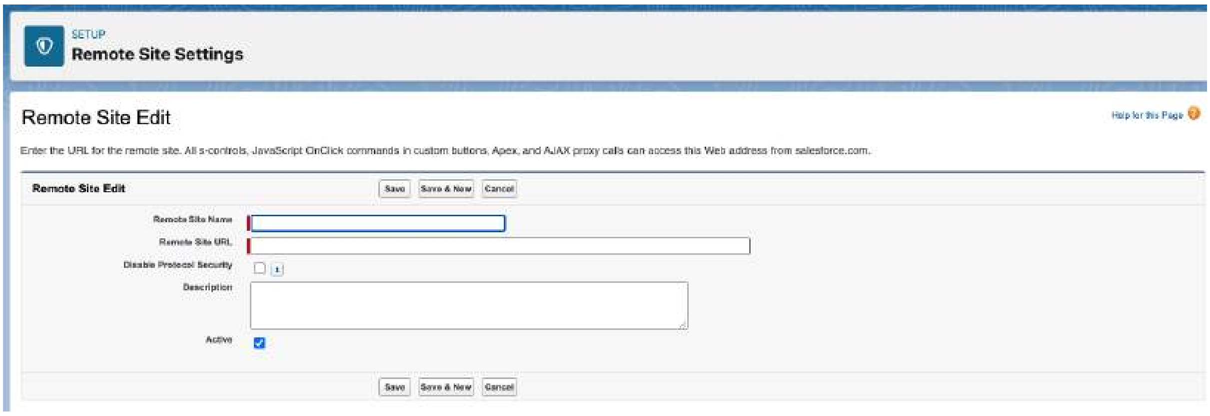
The added address will require verification. After saving, you will receive an email with a link that must be clicked to complete the verification process.



The verified email address will appear in the list with the status **Verified**.



6. Adding the Endpoint Address:
    a. Go to **Setup**.
    b. Search for **Remote Site Settings**.
    c. Click the **New Remote Site** button and fill in the following fields:
        i. **Remote Site Name** – any name
        ii. **Remote Site URL** – https://gus-connector.clorce.com
        iii. Ensure the Active checkbox is selected.
    d. Click **Save**.

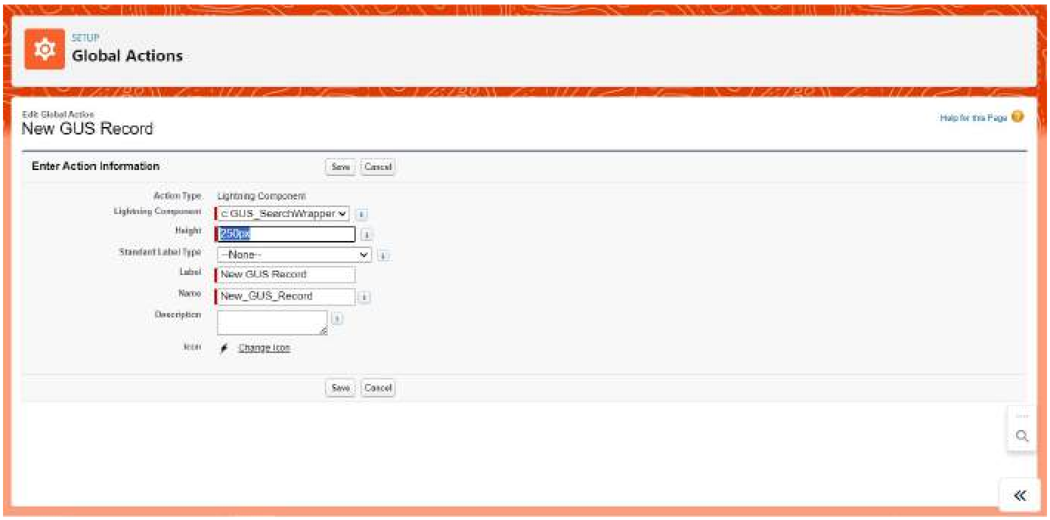


7. The search component can be made available to users in various locations and elements of the system based on needs:

- **As a Global Action**: The component will be visible to all users but not available in the mobile app. It will operate based on assigned permissions.
- **As a Utility Item**: The component will be visible to all users with access to the app for which it is configured. It will not be available in the mobile app and will operate based on assigned permissions. More details: help.salesforce.com.
- **As a Home Page Element**: You can control the visibility of the component for different users via the Lightning Page (using **Component Visibility**). It will not be available in the mobile app. Configuring Home Pages and their assignments is a standard Salesforce functionality. More information: help.salesforce.com.

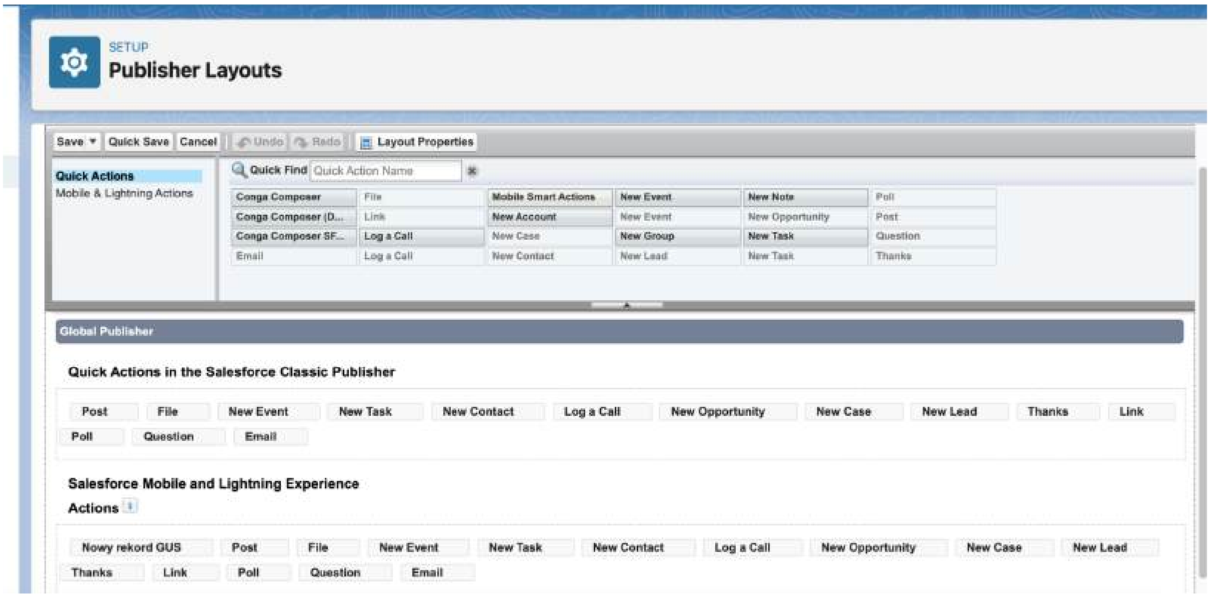
8. To add the GUS search component as a Global Action:

- Go to **Setup** → **Global Actions** → click **New Action**.
- Fill in the fields as follows:
    - **Action Type**: Select **Lightning Component**.
    - **Lightning Component**: Search for the component named bo_gus:GusSearchWrapper.
    - **Label**: Provide your custom name, e.g., New GUS Record.
    - Click **Save**.



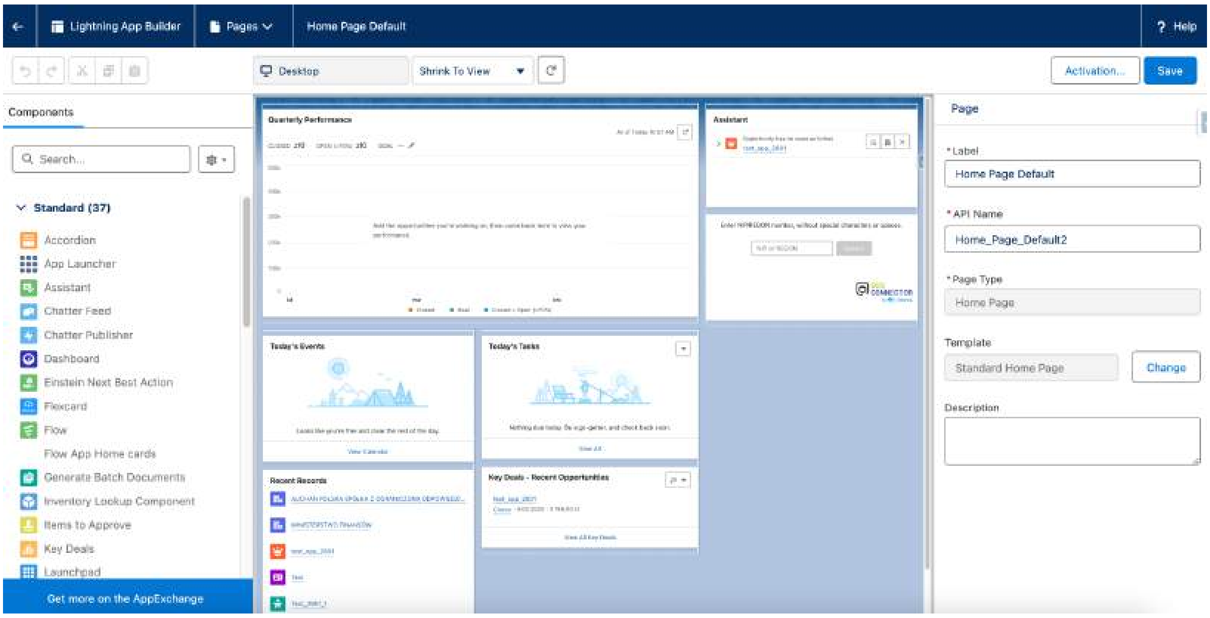
Next, navigate to **Setup** → **Global Actions** → **Publisher Layouts**.

Add the GUS search component to **Salesforce Mobile and Lightning Experience Actions** in the Global Layout (click **Edit** next to Global Layout). Save the changes.

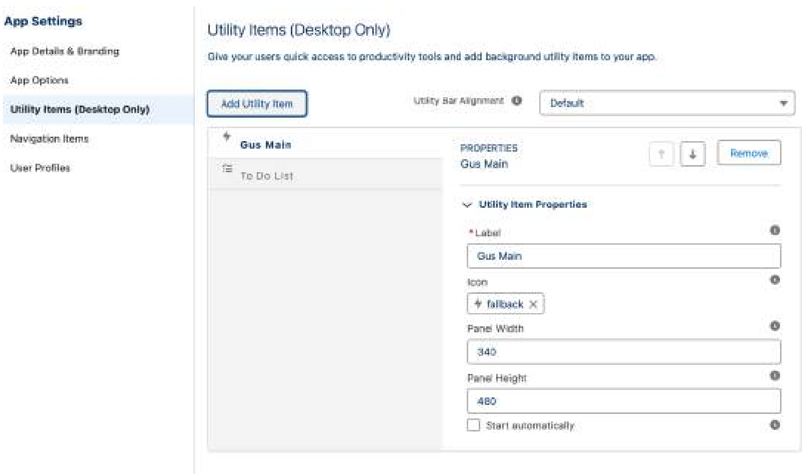


9. To add the GUS search component to the Home Page:

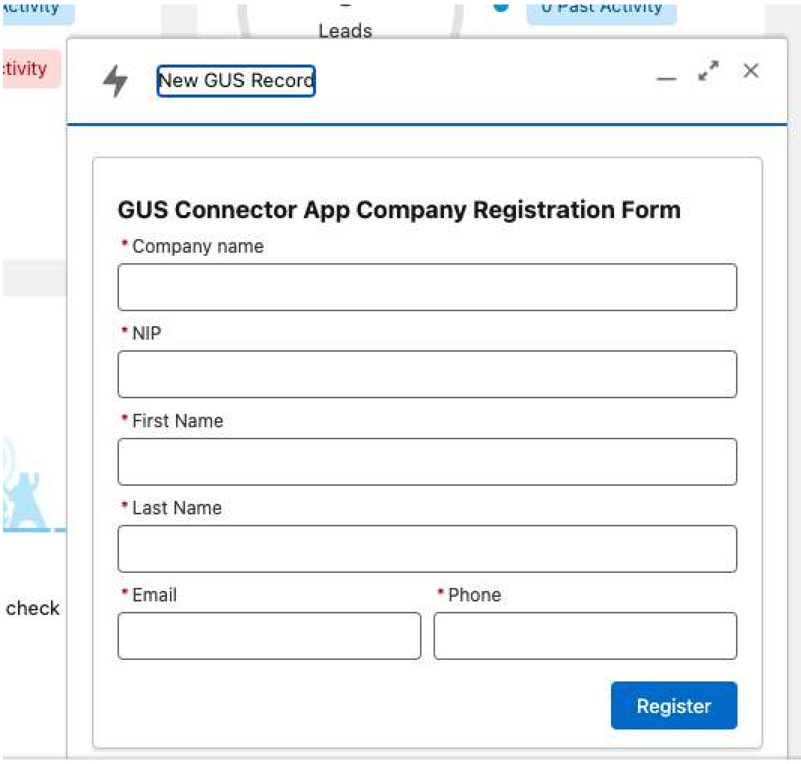
- Open the Home Page of the desired app (e.g., Service), expand the **Setup** menu, and select **Edit Page**.
- In the **Components** menu on the left side of the screen, under **Custom** or **Custom - Managed**, drag the GUS Main element to the desired section of the page layout. Locations where the component can be added will be highlighted in green.
- Click **Save** in the top-right corner of the screen. If the **Activate** button is not grayed out, activate the page and click **Back** (arrow in the top-left corner). Refresh the Home Page. The component should now be visible in the selected layout section.



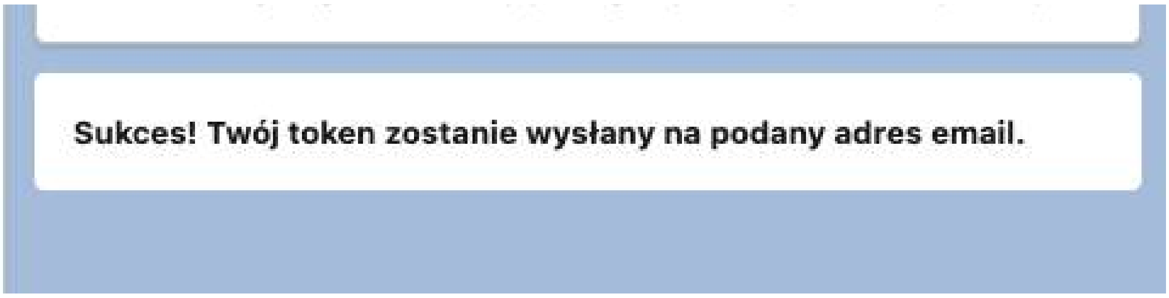
10. To add the GUS search component to Utility Items:
- Go to **Setup** → **Apps** → **App Manager**.
- Find the app where you want to add the component and select **Edit**.
- In the **Utility Items** tab, click **Add Utility Item**.
- Under **Custom**, select GUS Main.
- Click **Save**.



11. Next, open the **GUS Connector** application from the location where it was added (via **Global Action**, the **Home Page**, or **Utility Items**). As a **System Administrator**, the application will be active immediately after installation, but a **Token must be obtained**. The user will see a form that must be completed in order to obtain the **Token**, which is required for the application to function properly.



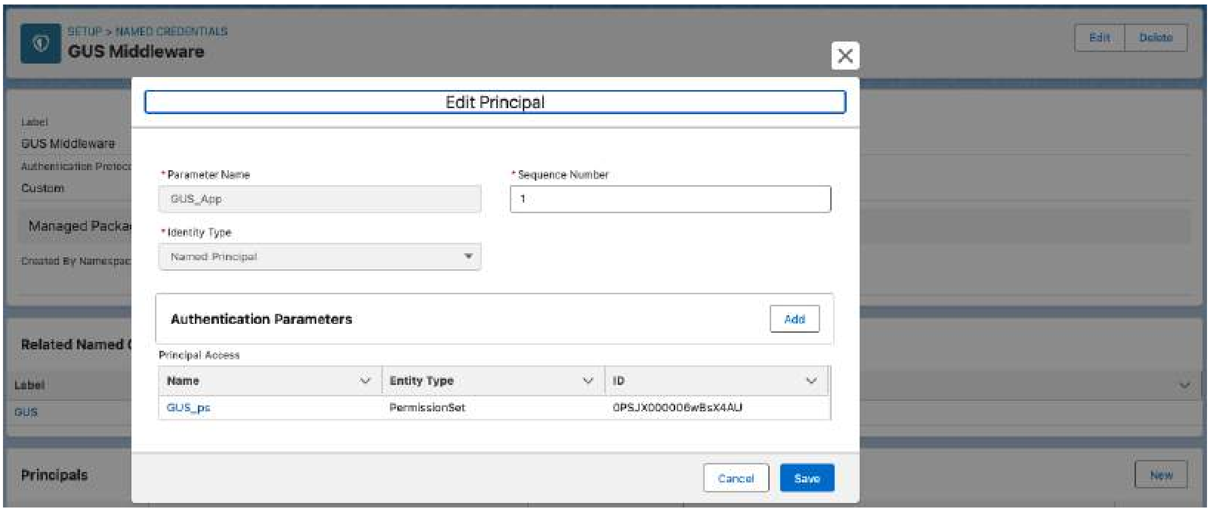
Fill in all the fields and click **Register**. If the registration is successful, a confirmation message will be displayed, and an email will be sent to the provided address containing the **Token ID**, which is required to continue the installation.



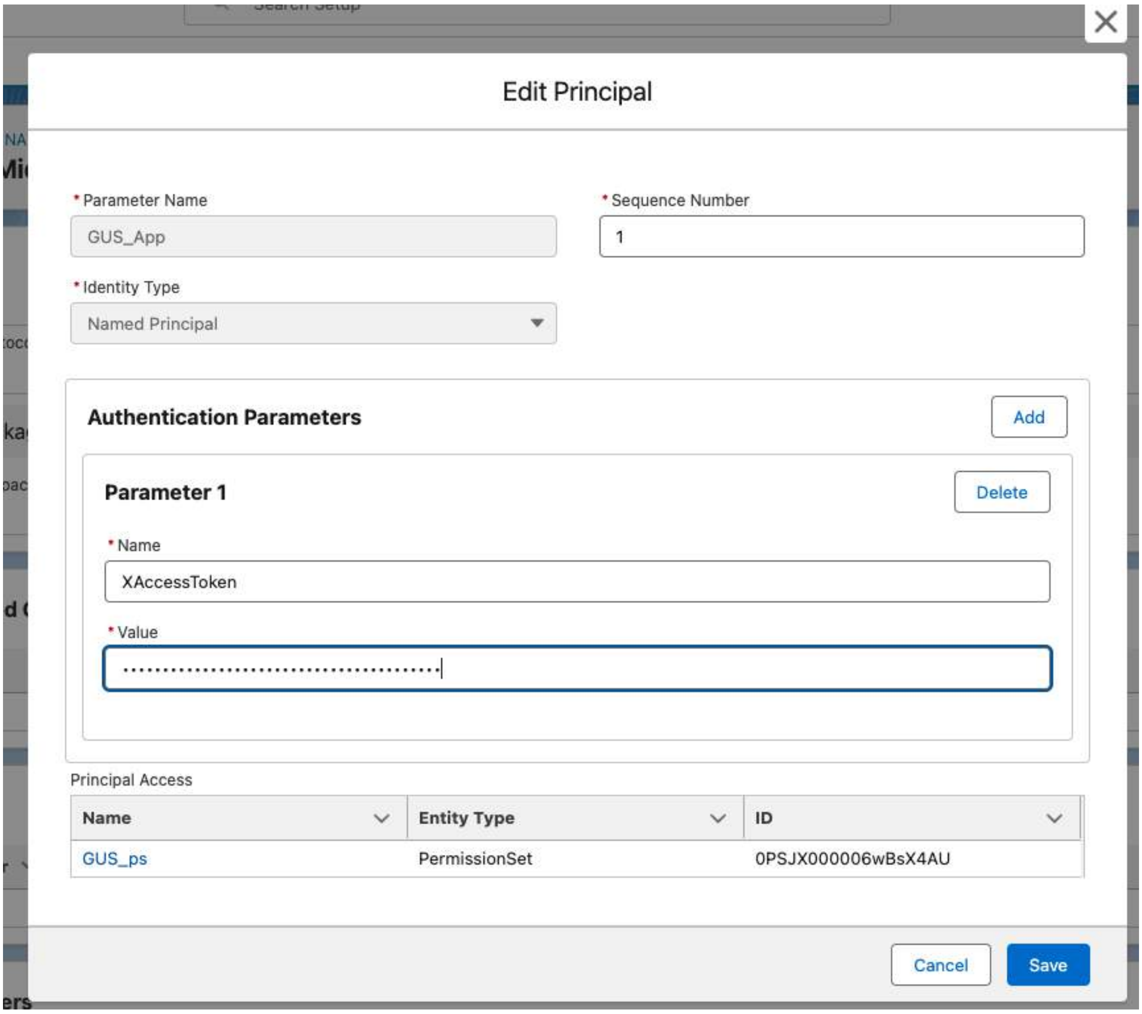
12. With the **Token ID**, go to **Settings** and select:
    a. Setup.

b. Security Section → Named Credentials.
c. Then, navigate to the **External Credentials** tab and click on **GUS Middleware**.
d. In the **Principals** section, click the arrow on the right side next to **GUS_App** and select **Edit**.

e. Click the **Add** button in the **Authentication Parameters** section.



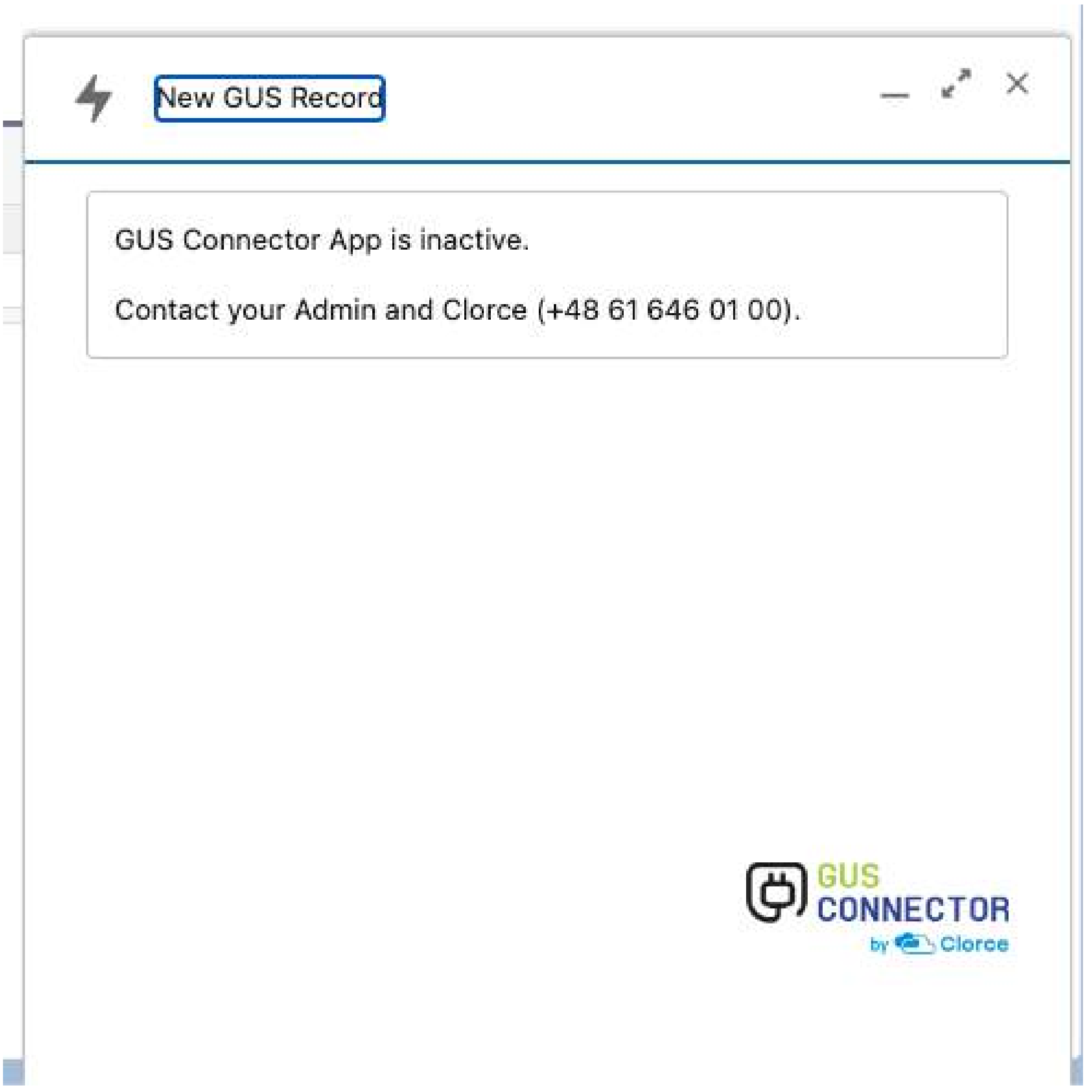
f. In the **Name** field, enter the value: **XAccessToken**.
g. In the **Value** field, paste the **Token ID** received in the email.
h. Then, click the **Save** button.



13. Starting from version 0.3 of the application, the **GUS Connector** logo and the **Clorce Company** logo have been added. It is possible to disable the Clorce Company logo. To do so, please contact our company.

GUS CONNECTOR by Clorce

14. If, for any reason, the application is deactivated, the user will see a message about the inactive plugin.



15. The plugin installs a group of custom fields for storing data from GUS. To display the retrieved or updated data, these fields must be added to the Page Layouts of the Lead and Account objects, respectively:

- **Setup → Lead → Page Layouts**
- **Setup → Account → Page Layouts**

All fields added by the application have the prefix **GUS** in the Field Name (see Fields & Relationships), e.g., **GUS_NIP__c**.

Fields available for the Lead object by Label are:

- NIP,
- REGON,
- NIP Status,
- Silo Description (based on BIR),
- SiloID (Type of activity from BIR),
- Latest Sync Date (this field should not be added to the layout).

Fields available for the Account object by Label are:

- NIP,
- REGON,
- NIP Status,
- Silo Description (based on BIR),
- SiloID (Type of activity from BIR),
- Latest Sync Date (this field should not be added to the layout).

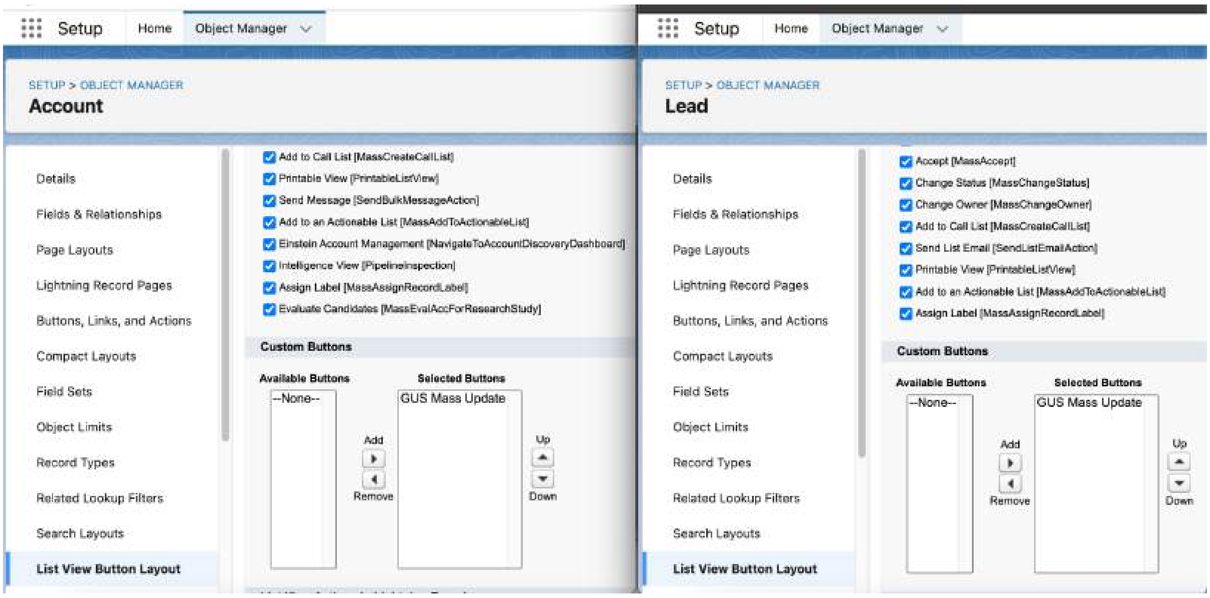
Note: If Dynamic Forms are enabled on the object, these fields must be added through the Lightning Page Layout. Otherwise, even after adding them to the Detail Page, they will not be visible to the user.

16. To add the **Mass Update** button to the Lead list view, follow these steps:

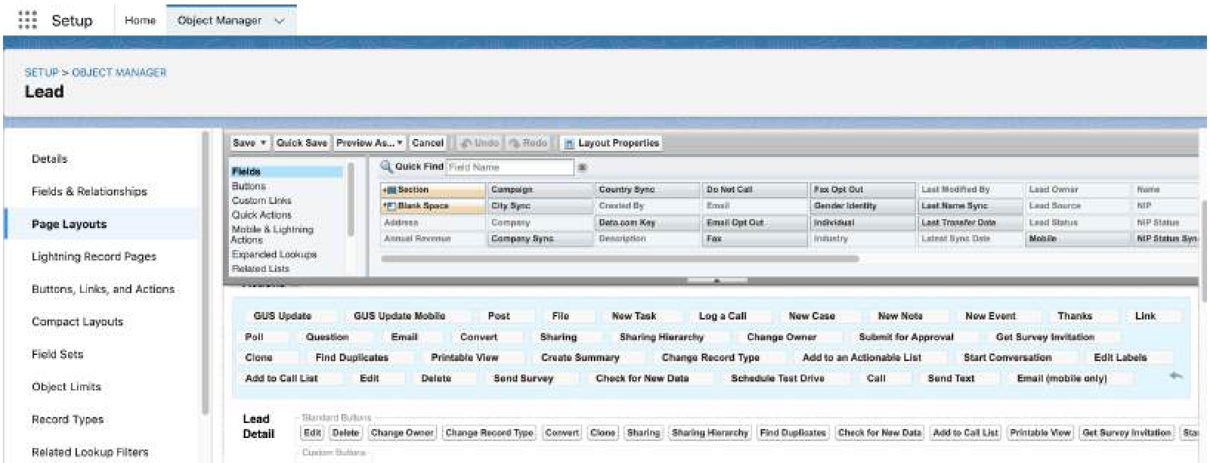
- Navigate to **Setup** → **Lead** → **List View Button Layout**.
- Select the **Edit** option for the List View (click the down arrow on the right side of the screen).
- In the **Custom Buttons** section, move the **GUS Mass Update** button from the available buttons to the selected buttons.

17. To add the **Mass Update** button to the Account list view, follow these steps:

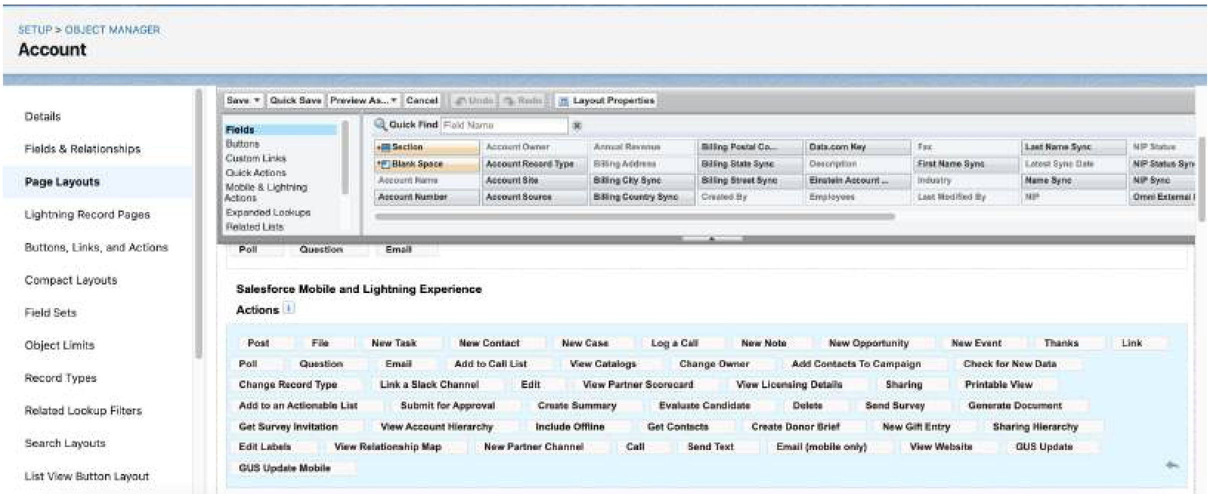
- Navigate to **Setup** → **Account** → **List View Button Layout**.
- Select the **Edit** option for the List View (click the down arrow on the right side of the screen).
- In the **Custom Buttons** section, move the **GUS Mass Update** button from the available buttons to the selected buttons.



18. To add the **Single Record Update** button for a Lead, follow these steps:
    - Navigate to **Setup** → **Lead** → **Page Layouts**.
    - In the selected Page Layout, move the **GUS Update** button (Mobile and Lightning Actions) to the **Salesforce Mobile and Lightning Experience Actions** section.



19. To add the **Single Record Update** button for an Account, follow these steps:
- Navigate to **Setup** → **Account** → **Page Layouts**.
- In the selected Page Layout, move the **GUS Update** button (Mobile and Lightning Actions) to the **Salesforce Mobile and Lightning Experience Actions** section.



*If you are using the **GUS Single Verify** component, which requires activating the Lightning Record Page, instead of the **GUS Update** button, you should use the **GUS Mobile Update** button. This button must also be added to the Lightning Record Page layout, along with the component itself.

20. Within the application, you also have the option to use a component for verifying data of a single record. To display this component, named **GUS Single Verify**, you need to add it

through the **Lightning Page Layout**. If you are using standard layouts, this requires activating the **Lightning Record Page**.

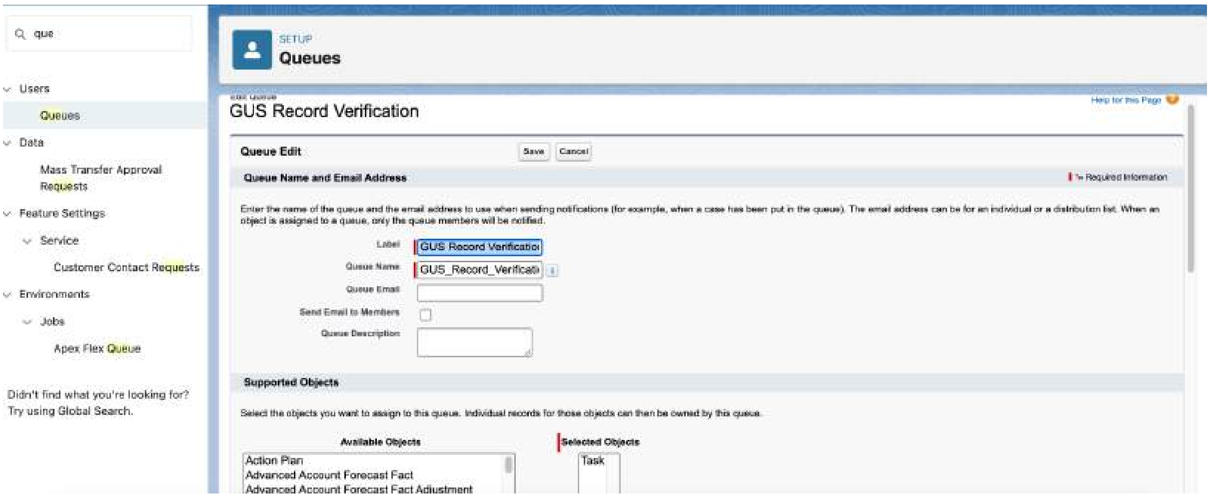
To do this:

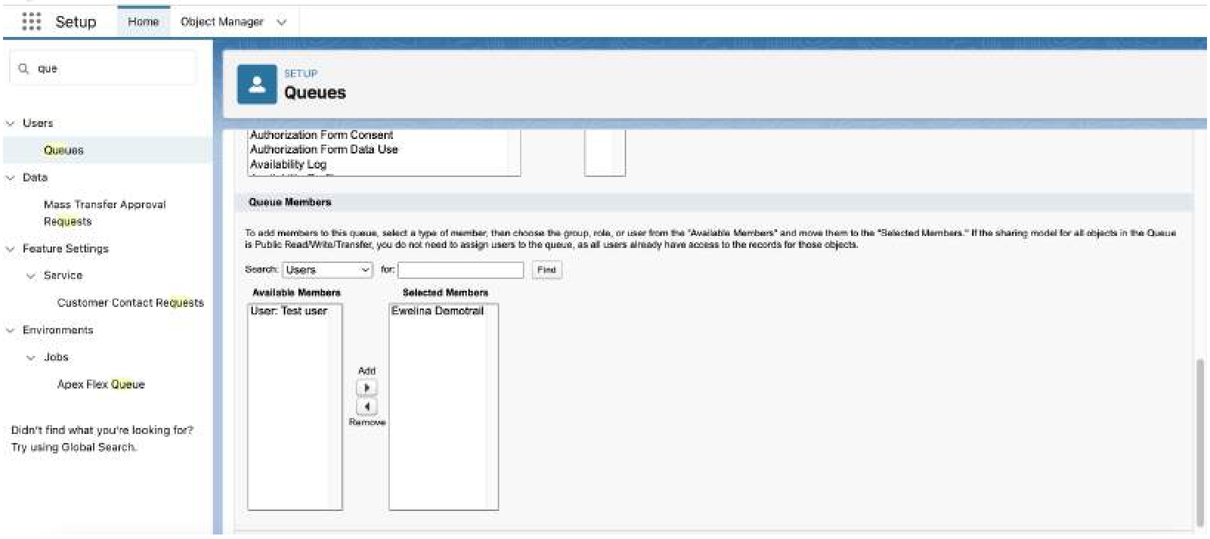
- Open a single **Account** record.
- Click the gear icon and select **Edit Page**.
- In the editor, locate the component named **GUS Single Verify** and drag it to an available position on the page layout.
- Save the changes.

The same actions must be performed for a **Lead** record.

21. For the **GUS Single Verify** component to function correctly, you need to add a new queue named **GUS Record Verification** to the environment. To do this:

- Go to **Setup** in Salesforce.
- Search for **Queues** in the Quick Find box and click on **New**.
- In the **Label** field, enter the value **GUS Record Verification**.
- Select the **Task** object.
- Add members to the queue.
- Click **Save**.



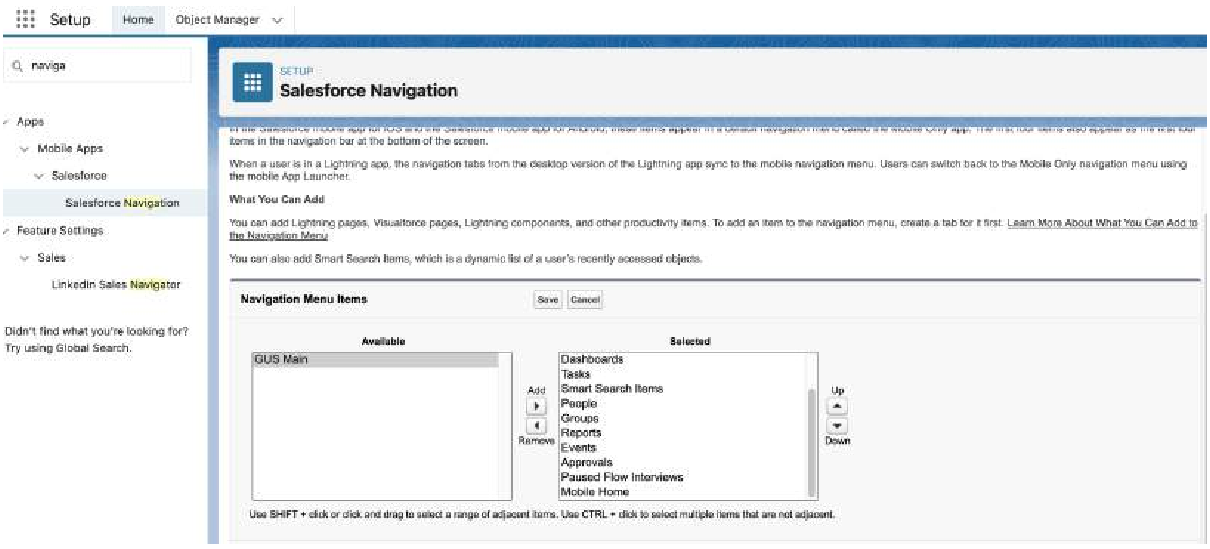


22. Along with the plugin, three types of reports are installed and can be found in the **GUS Connector Reports** folder:

- **GUS - Leads by Activity Type**: Organizes Lead records by BIR activity type, with columns representing updated fields.
- **GUS - Accounts by Activity Type**: Organizes Account records by BIR activity type, with columns representing updated fields.
- **GUS - Accounts by State**: Organizes Account records by NIP status, with columns representing updated fields.

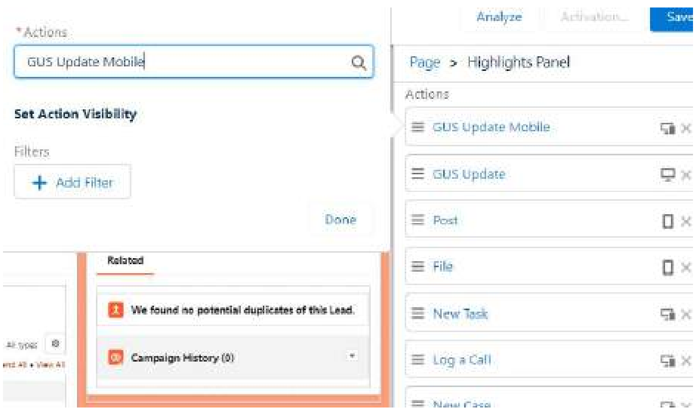
23. Mobile Application Configuration:

- You need to add **GUS Main** to **Salesforce Navigation**.



- For the proper functioning of the mobile app, it is necessary to have the GUS_AccountCreate and GUS_LeadCreate permission sets, which include permissions for the GUS Main component.

- And the **GUS Update Mobile** button in **Dynamic Actions**, in the **Lightning App Builder** for Lead and Account records.

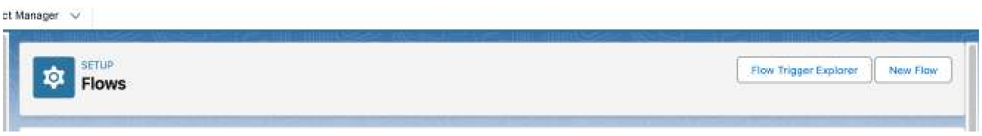


What if I already have a field for NIP and/or REGON?

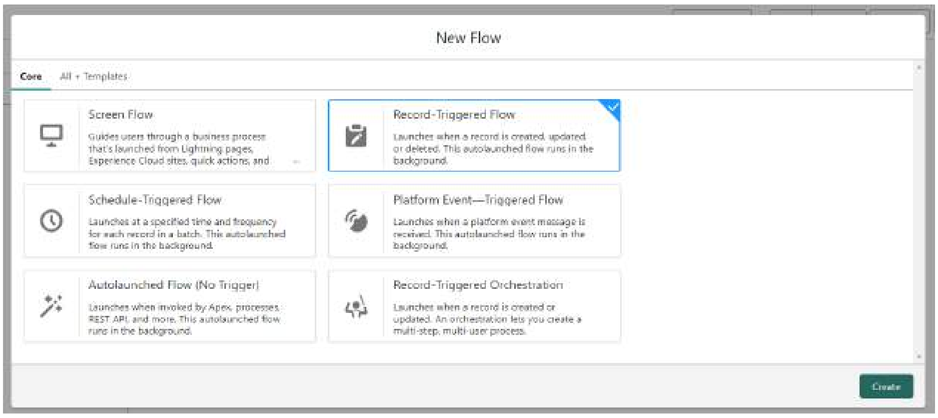
Mapping data from fields available in the application to fields specified by the user (e.g., to their existing fields)

In a situation where the Lead or Account objects already (prior to the plugin installation) contain fields for NIP or REGON numbers, or other fields storing data retrieved by the GUS Connector, and these are the fields where the plugin’s data should be stored, you can create a Salesforce Flow automation to copy the data retrieved from GUS into the specified fields.

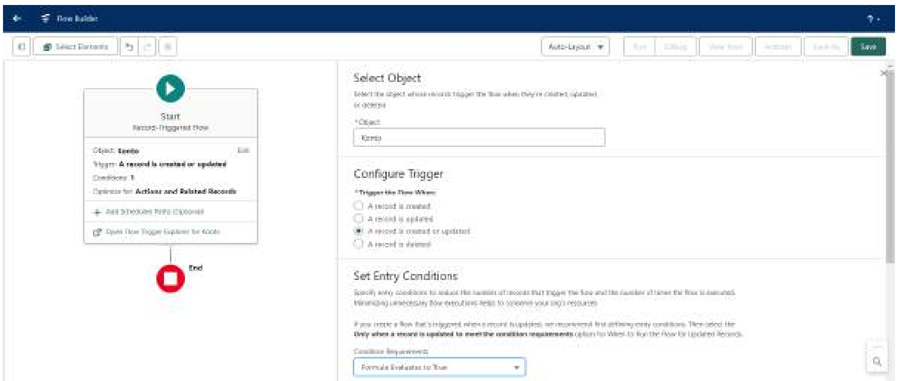
1. Make sure that the necessary field(s) exist in the mentioned objects where you will map the data.
2. Go to: **Setup** → **Process Automation** → **Flows**.
3. On the right side of the screen, above the list of existing Flows, select **New Flow**.



4. Your Flow should trigger automatically when a record is created or updated. Select the Record-Triggered Flow tile, then click the Create button.



5. On the flow path, select the Edit option for the Start element.



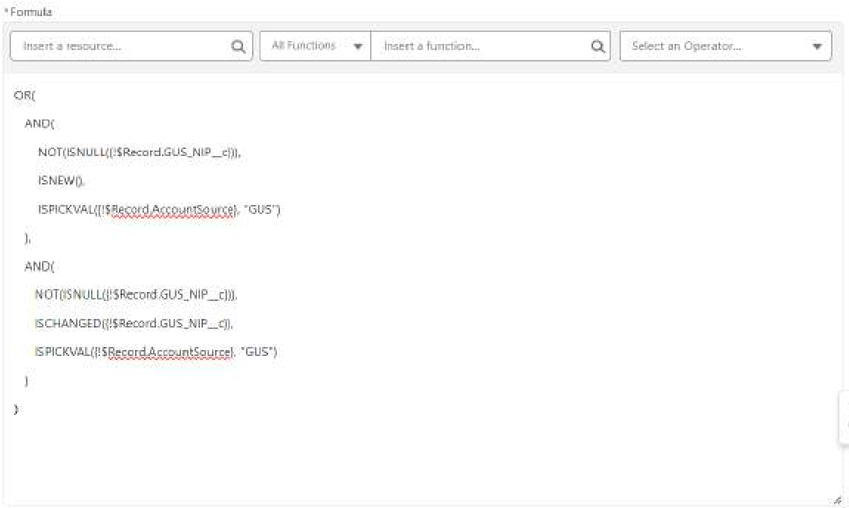
6. In the "Select Object" section, choose either Lead or Account (depending on which object the Flow should apply to).
7. In the "Configure Trigger" section, select the "A record is created or updated" option.
8. In the "Set Entry Conditions" section, choose the "Formula Evaluates To True" option.
9. In the "Formula" section, enter the following formula:

OR(

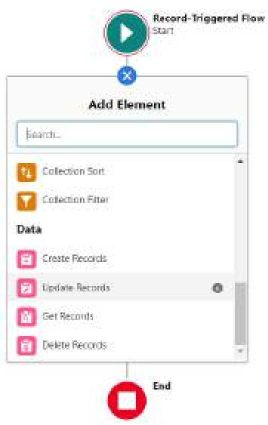
```
    AND(
      NOT(ISNULL({!$Record.GUS_NIP__c})),
      ISNEW(),
      ISPICKVAL({!$Record.AccountSource}, "GUS")
    ),
    AND(
     NOT(ISNULL({!$Record.GUS_NIP__c})),
     ISCHANGED({!$Record.GUS_NIP__c}),
     ISPICKVAL({!$Record.AccountSource}, "GUS")
    )
  )
```

The formula contains conditions for triggering the flow: the NIP field is not empty, and the record is newly created, or the value of the NIP field has been changed, and the data source is GUS.

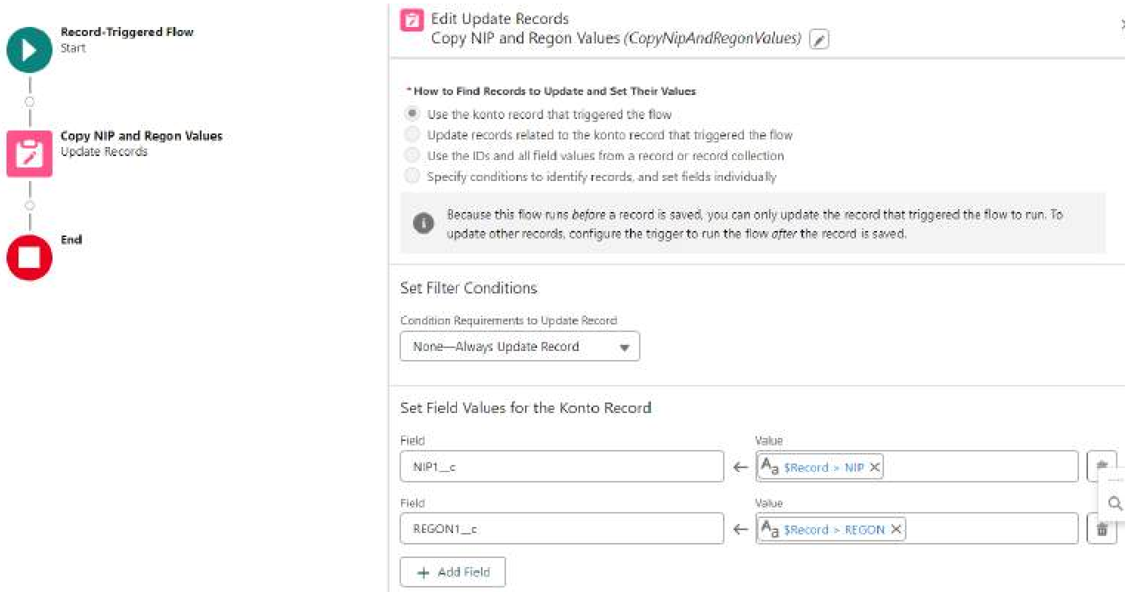
Note! Before saving the formula, it's a good idea to use the Check Syntax option (button on the left side under the Formula window). Flow Builder will automatically check the syntax of the formula and point out any errors.



10. In the "When to Run the Flow for Updated Records" section, select the option "Every time a record is updated and meets the condition requirements."
11. In the "Optimize the Flow for" section, choose the Fast Field Updates tile.
12. On the flow path, add a new element, and from the element addition menu, select the "Update Records" option.
13. Fill in the Label field (e.g., "Copy NIP and Regon Values"), and optionally fill in the Description field.
14. In the "How to Find Records to Update and Set Their Values" section, choose the option "Use the Account/Lead record that triggered the flow" (depending on which object the flow is related to).
15. In the "Set Filter Conditions" section, choose "None - Always Update Record."
16. In the "Set Field Values for the Account/Lead Record" section:



- On the left side (Field), select the field where you want to copy the data (e.g., the NIP or REGON fields existing in the system before installing the GUS Connector).
- On the right side, select the fields from which the data should be copied (in the example, the NIP and REGON fields are used, but you can repeat this operation for all data variables in the GUS Connector installation process, as described in section 9 of the Installation Instructions).



Note! After configuring the flow, it's a good idea to use the Debug option (to the left of the Save and Activate buttons). Flow Builder will automatically check if the flow is working correctly.

17. Activate and save the Flow.
18. Make sure that the fields created by the GUS Connector are not added to the Object Page Layouts (see section 9 of the Installation Instructions).

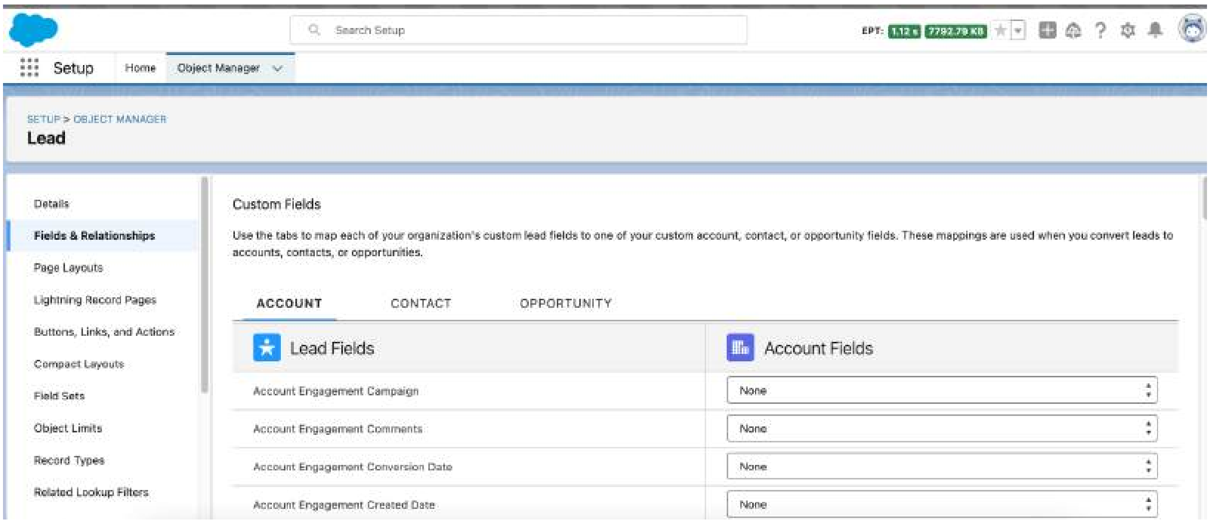
This configured Flow will automatically populate the specified fields when a record is saved during the creation and update of data from GUS.

Note! Check if any existing Validation Rules for the fields or objects to which the flow imports data are compatible with the rules for the fields installed with the plugin.

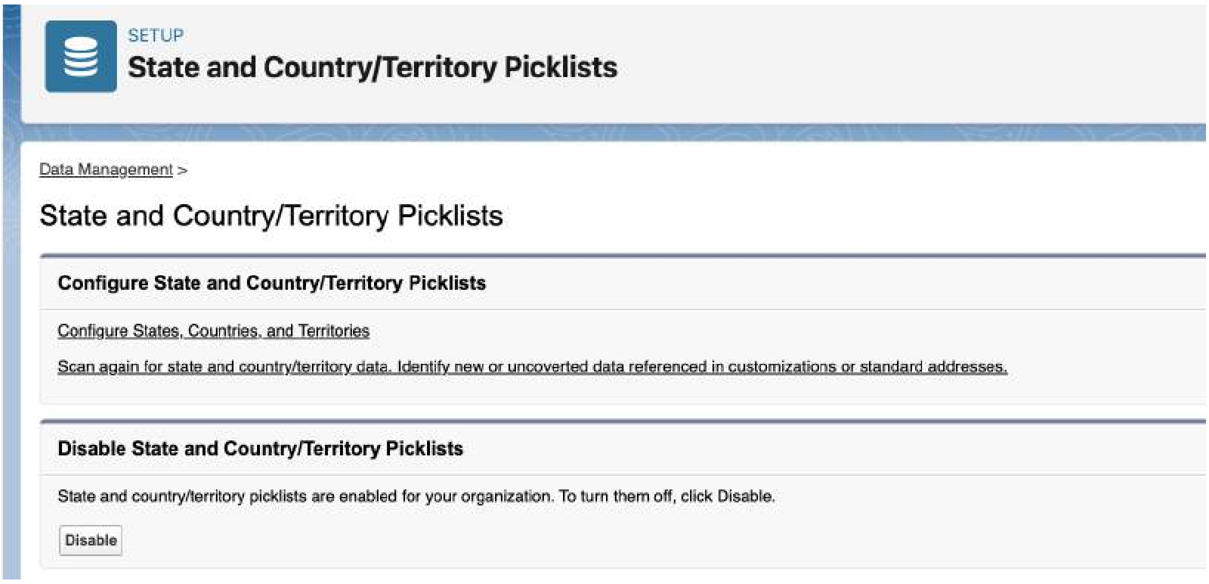
Note! Bulk data migration may burden the system due to the large number of potential queries. It's also a good idea to ensure that the implemented SF Flow does not conflict with other automations (such as triggers, Process Builders, etc.).

Field mapping in the case of converting a Lead to an Account.

When using the Lead conversion process, it's important to set up the appropriate field mapping. To do this, go to Setup by clicking the gear icon in the top-right corner. Then, navigate to Object Manager, select the Lead object, go to the Fields & Relationships tab, and click the Map Lead Fields button. In the displayed table, set the mapping by selecting the appropriate values in the Account column. Next, set the mapping for the NIP, REGON, SiloID, Silo Description, and address fields, and save the changes.

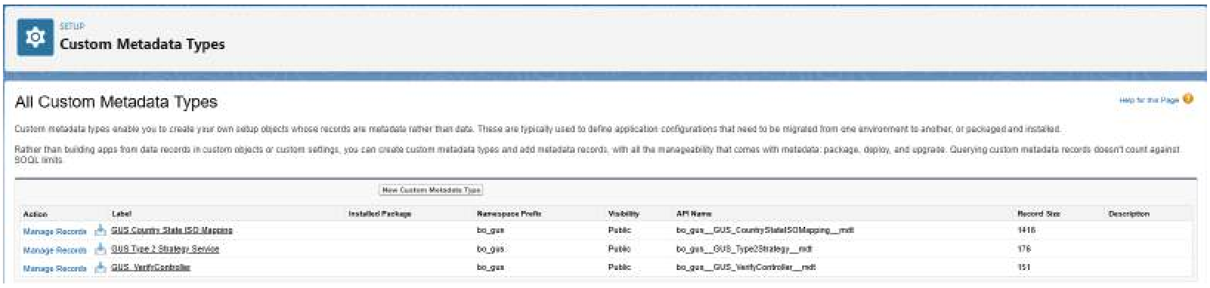


In the case where the org has the State and Country/Territory Picklists setting enabled.

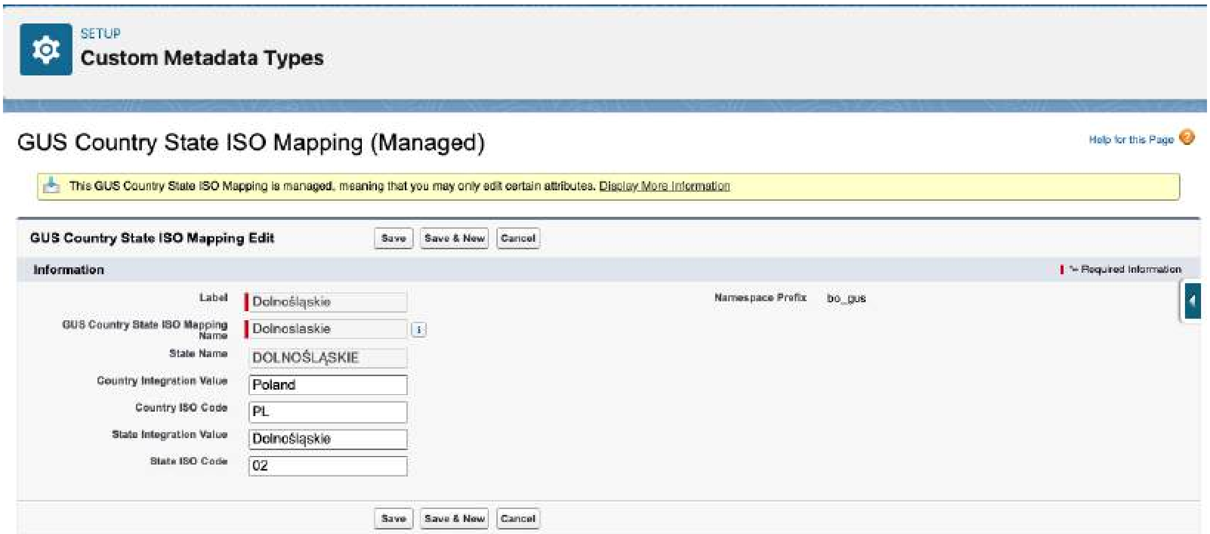


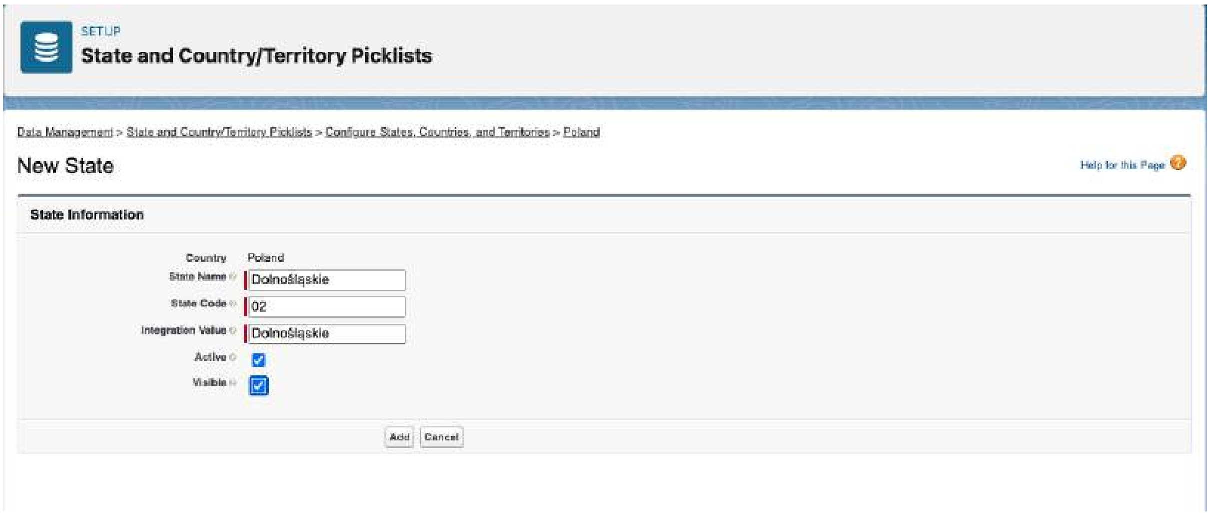
If the State and Country/Territory Picklists option is enabled in the organization, additional configuration is required to ensure that the feature works correctly.

For this feature to work correctly, an additional record has been added, a Custom Metadata Types - GUS Country State ISO Mapping.

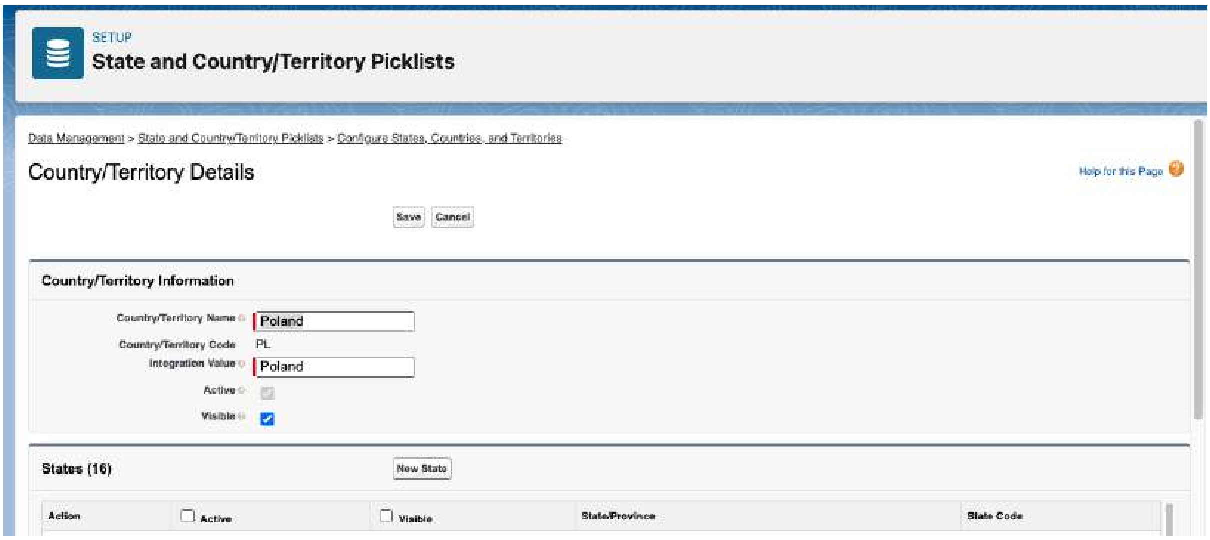


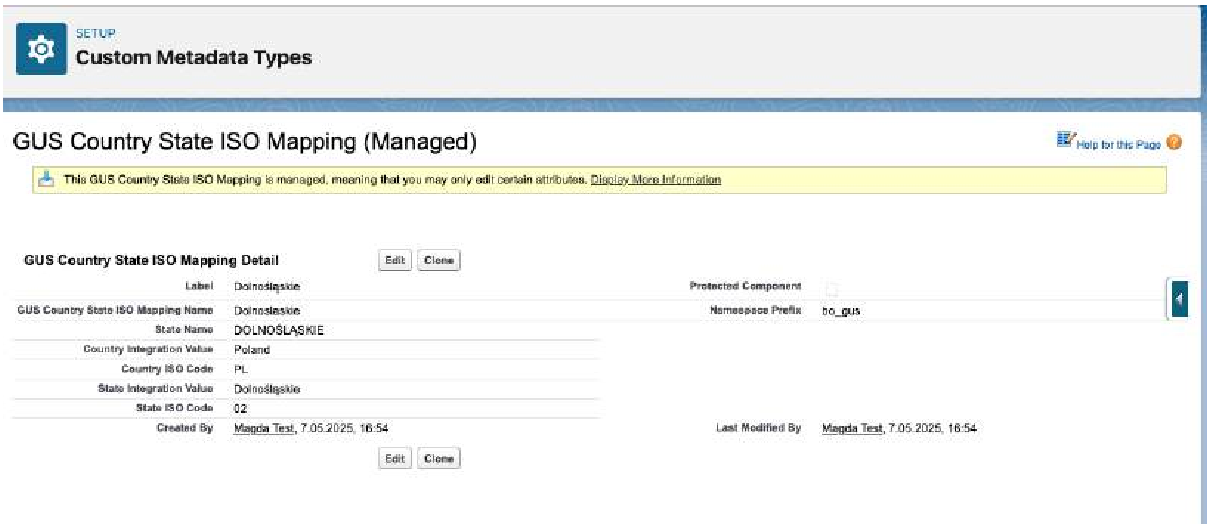
Clicking Manage Records next to GUS Country State ISO Mapping displays a list of added states. The state code entered in the Custom Metadata record must exactly match the code value entered in the State Code field in the Territories settings (State and Country/Territory Picklists) for the integration to work properly - so the user should either correct the values in Configure States, Countries, and Territories based on the data in Custom Metadata, or edit the values in the State ISO Code field in the added Custom Metadata.



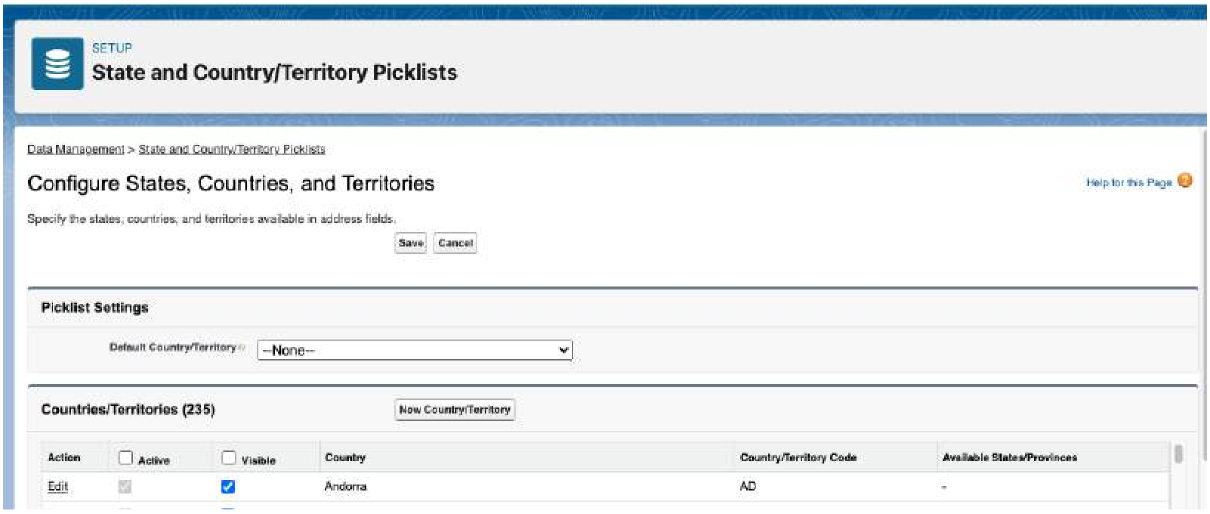


There must also be a match between the value in the Country/Territory Code and Integration Value fields in the Country/Territority Details settings, and the values in the Country Integration Value and Country ISO Code fields in Custom Metadata Types.





Additionally, please note that if in the State Country/Territory Pisklist settings, the Default Country/Territory field should be Poland or an empty value.



However, if a country other than Poland is selected there - then in case of creating a Lead, Account record with the Gus Connector plug-in, you should check and possibly change the value in the Billing Country field before saving.

For technical questions and concerns, please contact us via email at gus@clorce.com, and for sales inquiries (including those related to the number of queries), please email sales@clorce.com.