

EverReady App for Salesforce

Installation guide

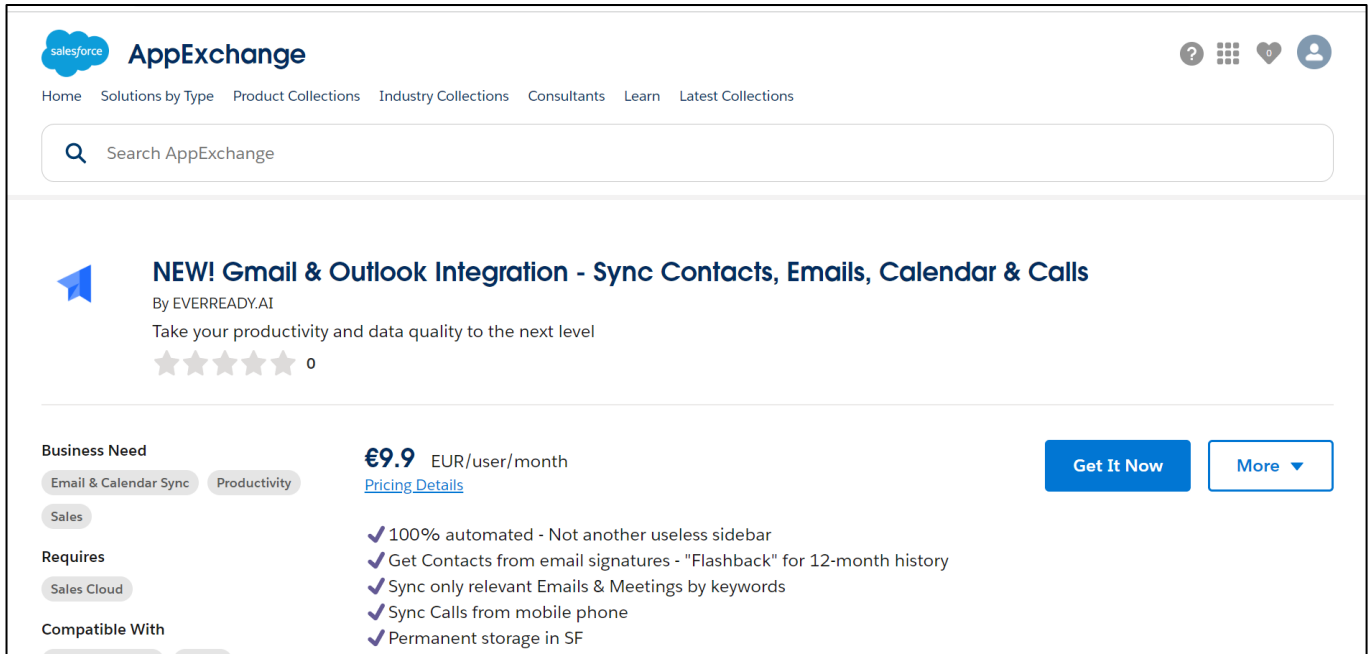
In this document you will find the procedure to install and configure the EverReady application in your Salesforce.

- 1 – Download EverReady App
- 2 – Configure user permissions
- 3 – Install the Widget on your Home Page

 **Before you start:** If you are not already an EverReady customer, please make sure you contact our sales team to sign up and activate your user licenses. You can send an email to contact@everready.ai

1 – Download EverReady App

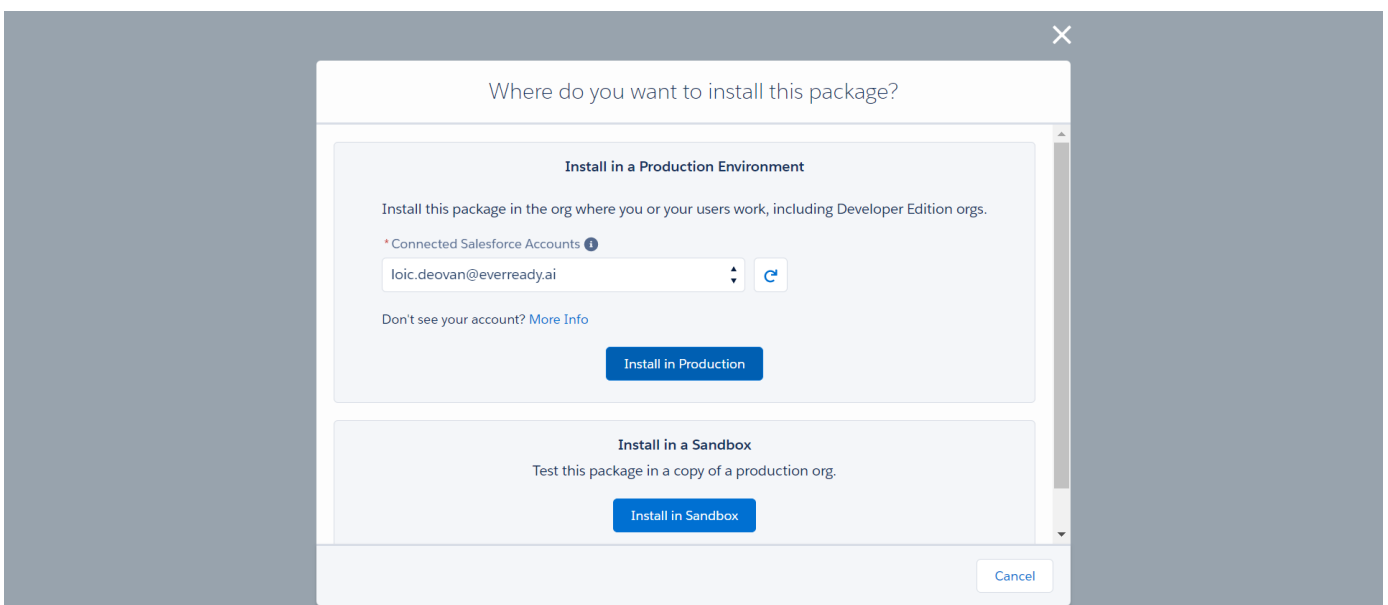
Go to the AppExchange and search for “ EverReady” in the search bar and click on our App. Then click on : **"Get in Now"** button.



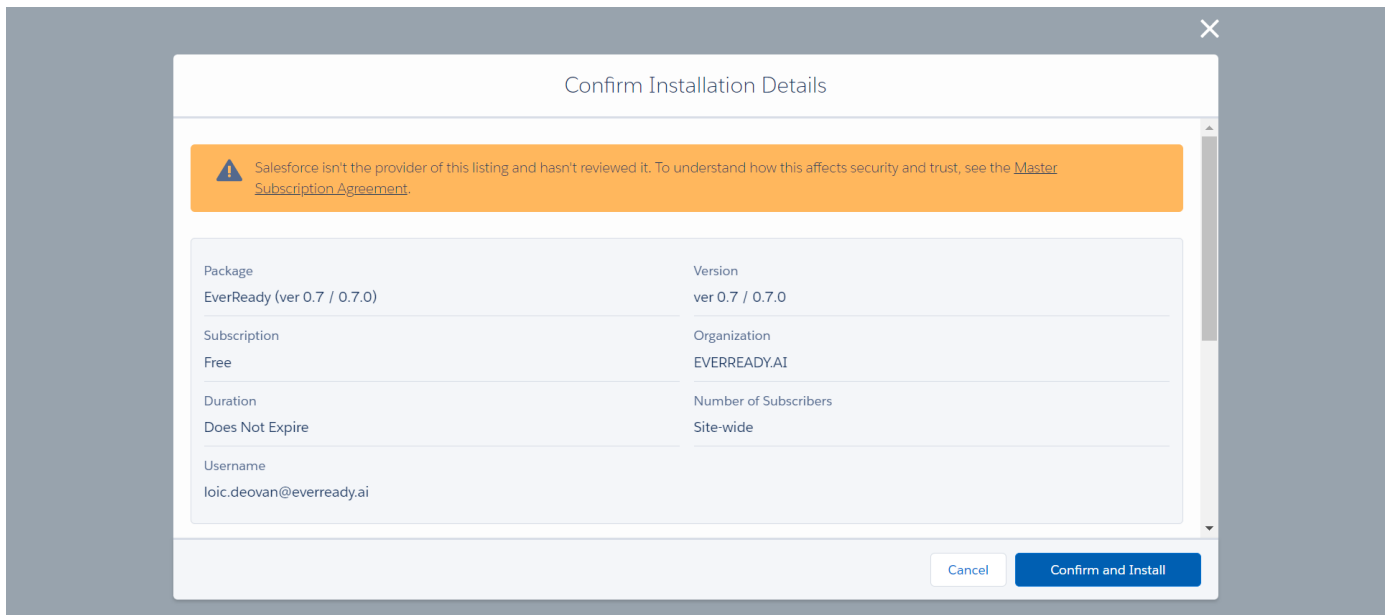
The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with links like Home, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, and Latest Collections. A search bar is prominently displayed. Below the search bar, the app listing for "NEW! Gmail & Outlook Integration - Sync Contacts, Emails, Calendar & Calls" by EVERREADY.AI is shown. It includes a description: "Take your productivity and data quality to the next level", a star rating of 0, and a price of €9.9 EUR/user/month. There are two buttons: "Get It Now" and "More". On the left, there are filters for Business Need (Email & Calendar Sync, Productivity, Sales), Requires (Sales Cloud), and Compatible With. A list of features is provided, including 100% automation, contact syncing from email signatures, email and meeting syncing by keywords, call syncing from mobile phones, and permanent storage in Salesforce.

You can choose to install the app in production or on your sandbox.

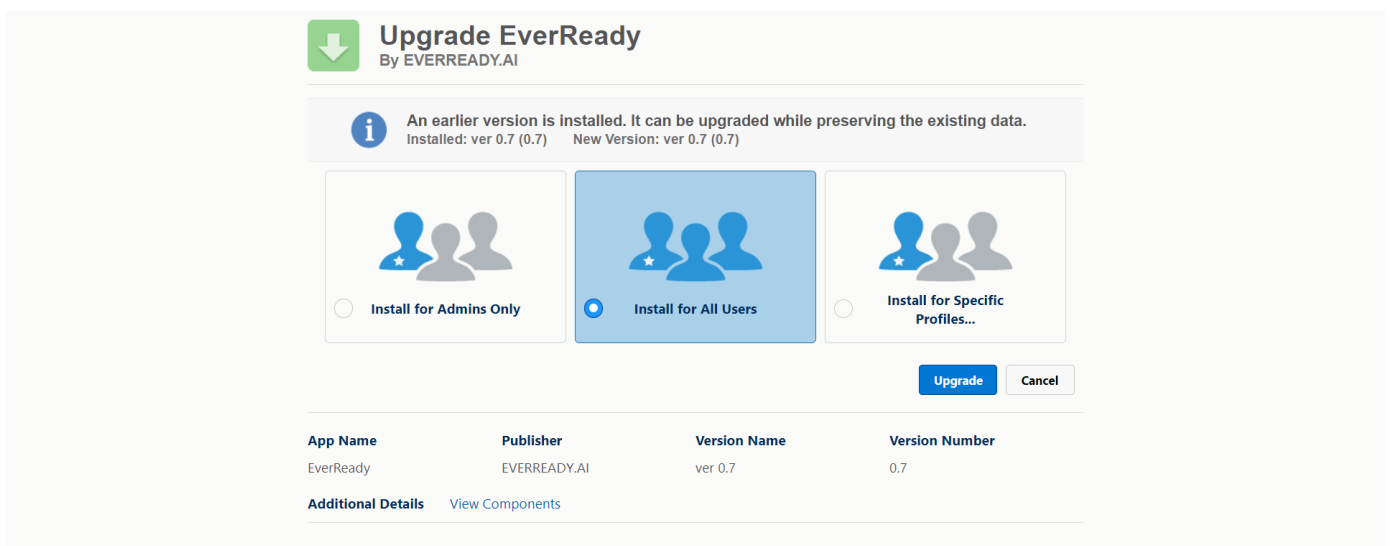
Please note: by default the EverReady application is connected to your production environment. If you want to test it on your sandbox, contact us (contact@everready.ai).



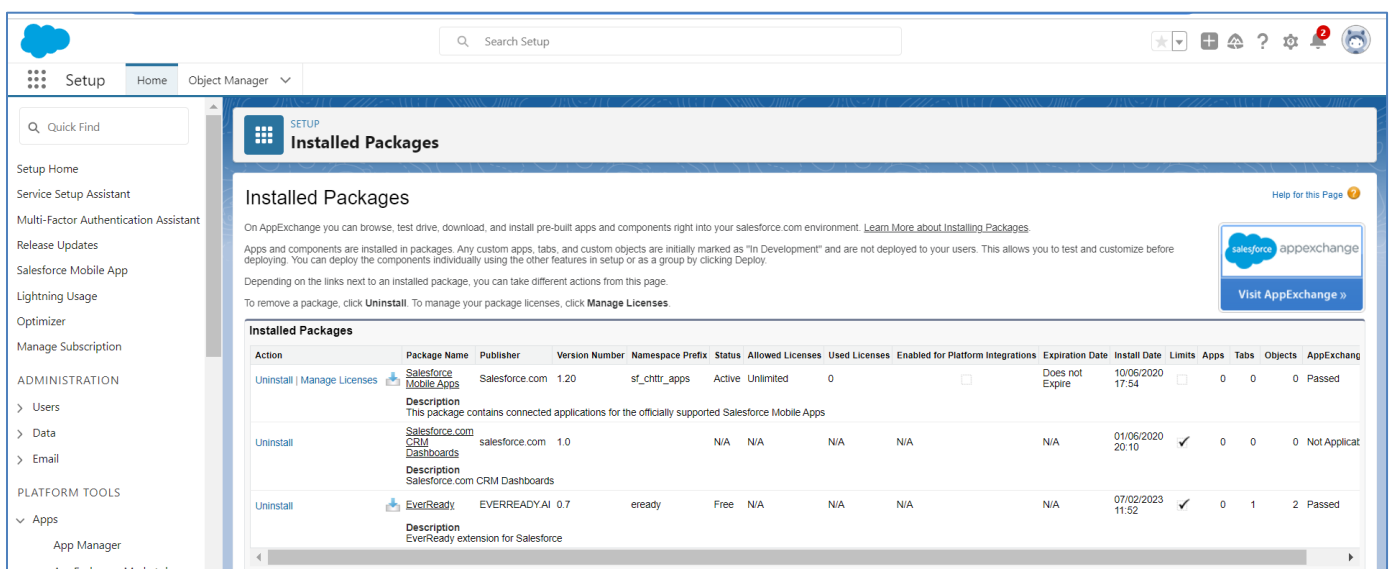
The screenshot shows a dialog box titled "Where do you want to install this package?". It has two main sections. The first section is "Install in a Production Environment", which includes the instruction "Install this package in the org where you or your users work, including Developer Edition orgs." and a dropdown menu for "Connected Salesforce Accounts" showing "loic.deovan@everready.ai". Below this is a link "Don't see your account? More Info" and a blue button "Install in Production". The second section is "Install in a Sandbox", which includes the instruction "Test this package in a copy of a production org." and a blue button "Install in Sandbox". At the bottom right of the dialog is a "Cancel" button.



Install EverReady for all users.



EverReady is now installed and you can see it in the "Installed Packages" menu 👍



Frequently encountered error 🤖

You may get an error message that says you cannot install EverReady App because **you have reached your "Dynamic Dashboards" limit**.



Installer EverReady

Par EVERREADY.AI



Ce package ne peut pas être installé.
There are problems that prevent this package from being installed.

(EverReady/ffDoOaTvCuQScRXTwpFvdmhWlwYeSX)EverReady/ffDoOaTvCuQScRXTwpFvdmhWlwYeSX: Vous avez atteint la limite d'exécution de tableaux de bord en tant qu'utilisateur connecté.

Terminé

Nom de l'application	Éditeur	Nom de version	Numéro de version
EverReady	EVERREADY.AI	ver 0.7	0.7

One way to solve this problem, without having to purchase new dashboards, is to deactivate one or more of your dynamic dashboards while you install EverReady App and then reactivate them.

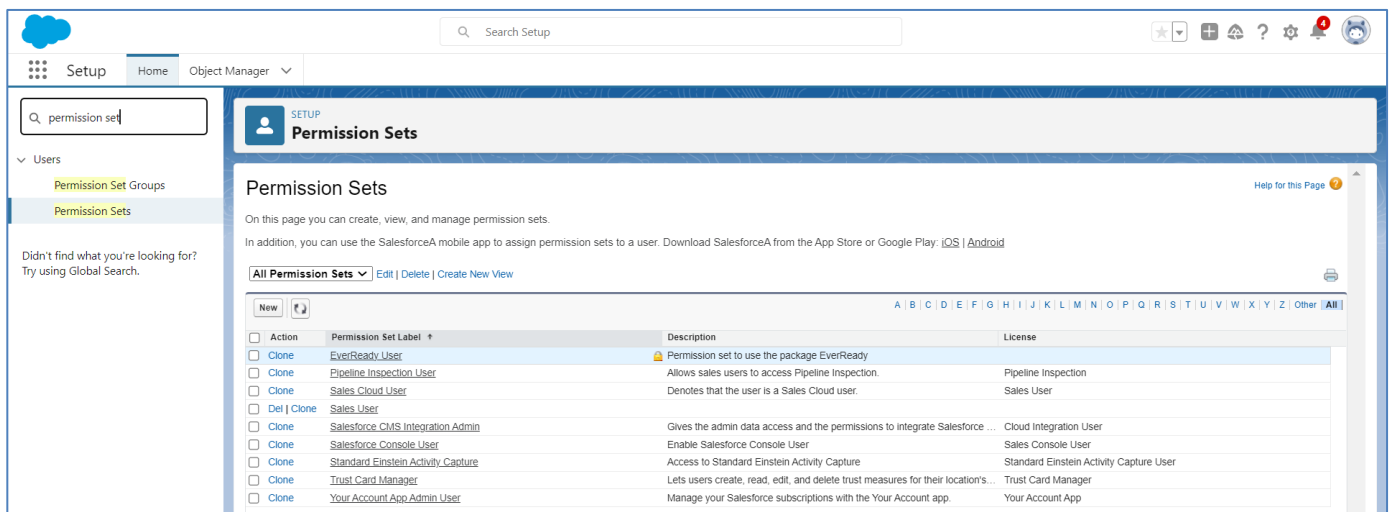
2 – Configure user permissions

You can give access to EverReady on a user-by-user basis or give access rights to a specific profile.

Access on a user-by-user basis

A specific EverReady "Permission set" is already pre-configured with all the rights and authorizations. You just need to assign users to this "Permission set".

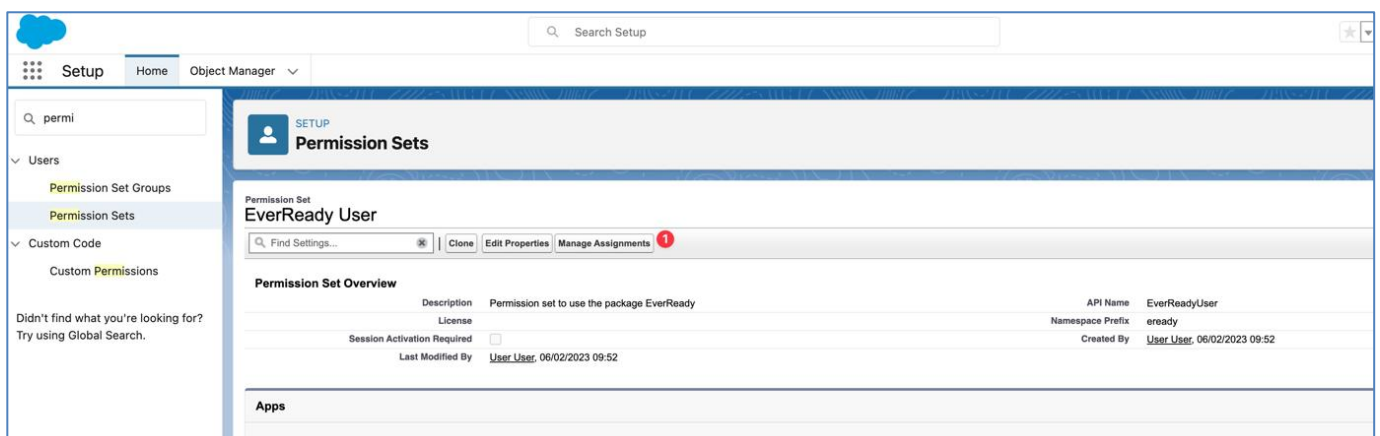
1 - Go to Setup / Permission Sets and click on “EverReady User”



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "permission set" entered. The main content area is titled "Permission Sets" and contains a table of permission sets. The "EverReady User" permission set is highlighted.

Action	Permission Set Label	Description	License
☐ Clone	EverReady User	Permission set to use the package EverReady	
☐ Clone	Pipeline Inspection User	Allows sales users to access Pipeline Inspection.	Pipeline Inspection
☐ Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user	Sales User
☐ Del Clone	Sales User		
☐ Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce ...	Cloud Integration User
☐ Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
☐ Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
☐ Clone	Trust Card Manager	Lets users create, read, edit, and delete trust measures for their location's...	Trust Card Manager
☐ Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App

2 – Click on “Manage Assignments” button



The screenshot shows the Salesforce Setup interface for the "EverReady User" permission set. The left sidebar has a search bar with "permi" entered. The main content area is titled "EverReady User" and contains a "Permission Set Overview" section. The "Manage Assignments" button is highlighted.

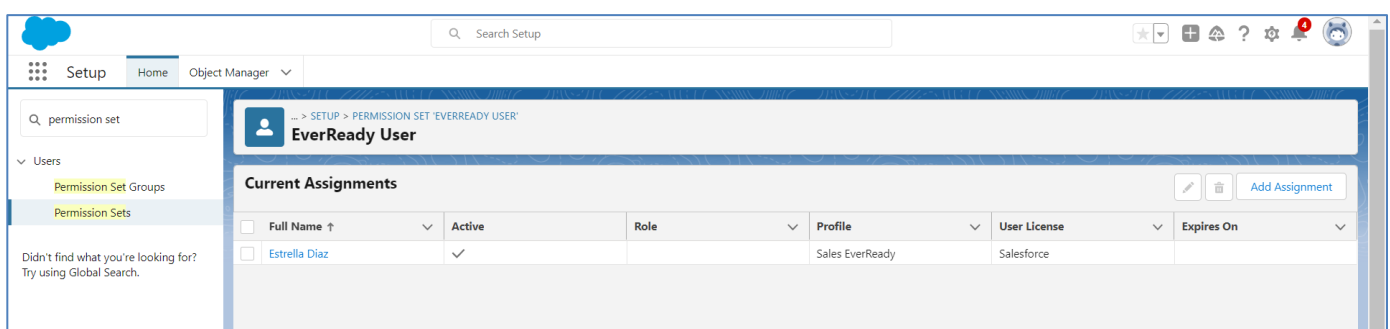
Description	API Name
Permission set to use the package EverReady	EverReadyUser

License	Namespace Prefix
	eready

Session Activation Required	Created By
☐	User User, 06/02/2023 09:52

Last Modified By
User User, 06/02/2023 09:52

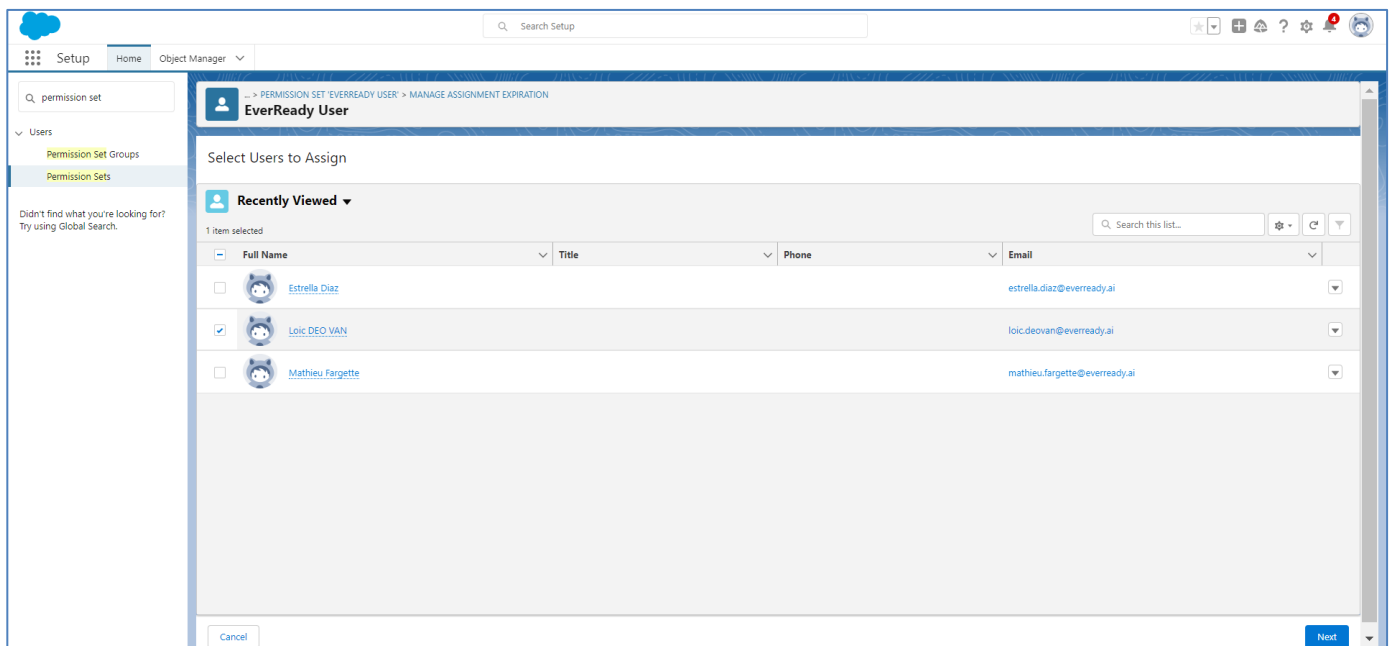
3/ Click on “Add Assignment” button



The screenshot shows the Salesforce Setup interface for the "EverReady User" permission set. The left sidebar has a search bar with "permission set" entered. The main content area is titled "EverReady User" and contains a "Current Assignments" section. The "Add Assignment" button is highlighted.

Full Name	Active	Role	Profile	User License	Expires On
Estrella Diaz	☒		Sales EverReady	Salesforce	

4 – Select one or multiple users and click “Next”



Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

PERMISSION SET: EVERREADY USER > MANAGE ASSIGNMENT EXPIRATION

EverReady User

Select Users to Assign

Recently Viewed

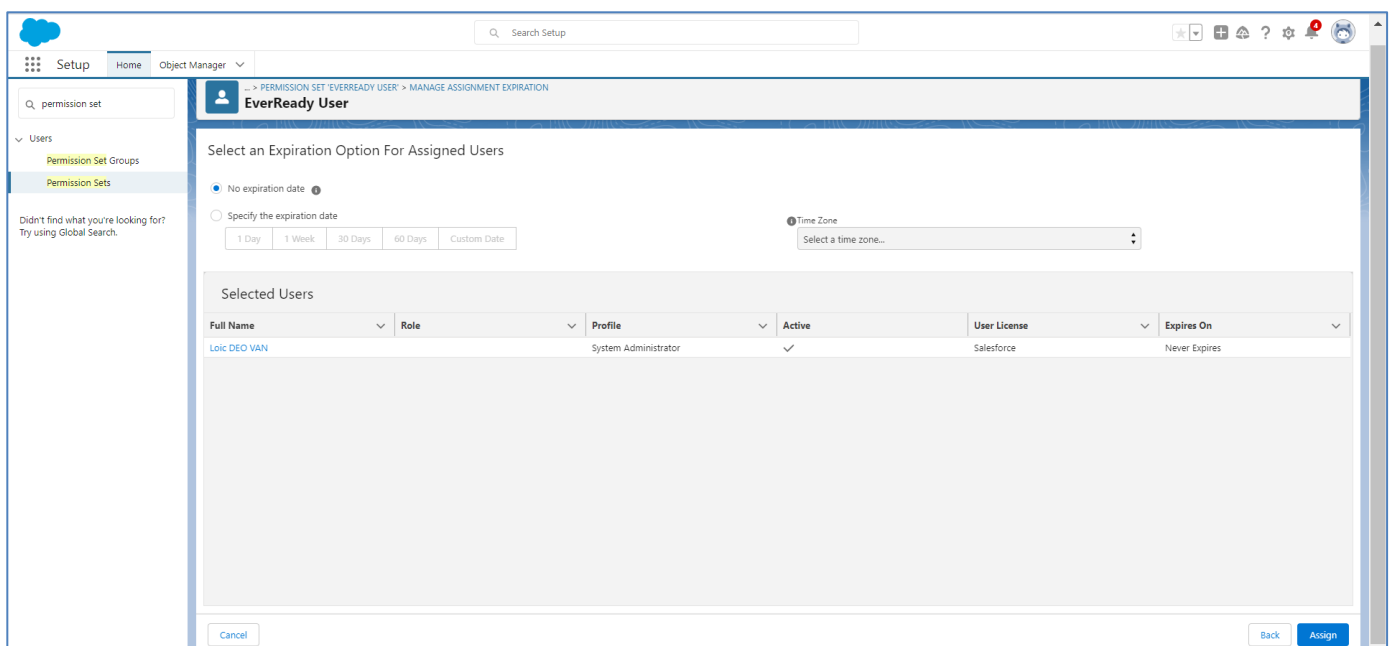
1 item selected

Search this list...

	Full Name	Title	Phone	Email
☐	Estrella Diaz			estrella.diaz@everready.ai
☒	Loic DEO VAN			loic.deovan@everready.ai
☐	Mathieu Fargette			mathieu.fargette@everready.ai

Cancel Next

Then click “Assign” button



Search Setup

Setup Home Object Manager

permission set

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Didn't find what you're looking for? Try using Global Search.

PERMISSION SET: EVERREADY USER > MANAGE ASSIGNMENT EXPIRATION

EverReady User

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

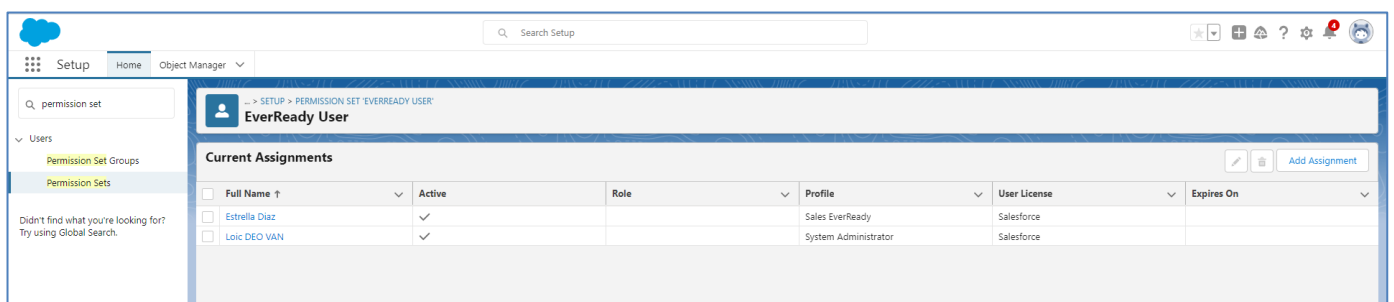
Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Loic DEO VAN	System Administrator	Salesforce	✓	Salesforce	Never Expires

Cancel Back Assign



Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP > PERMISSION SET: EVERREADY USER

EverReady User

Current Assignments

Full Name	Active	Role	Profile	User License	Expires On
Estrella Diaz	✓		Sales EverReady	Salesforce	
Loic DEO VAN	✓		System Administrator	Salesforce	

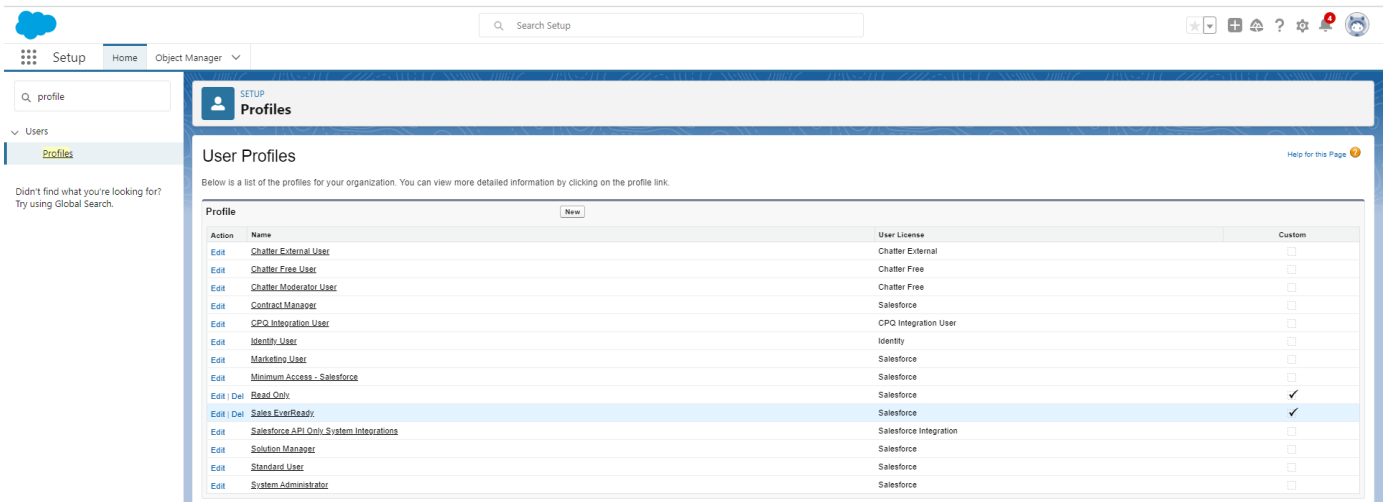
Add Assignment Assign

That's it, you have authorized a new user to use EverReady 👍

Access rights to a specific profile

You can give EverReady access to a specific profile type. To do this, you must set all permissions on the profile you wish to give access to.

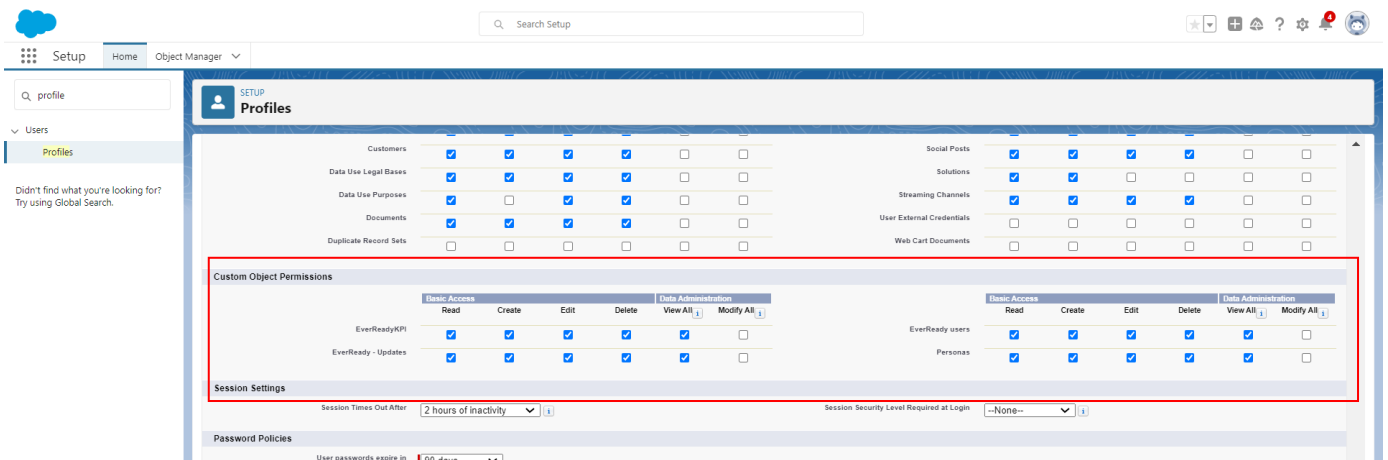
1 - Go to Setup / Users / Profiles and select the profile you wish to authorize then click on "Edit".



The screenshot shows the Salesforce Setup interface. The left sidebar has 'Setup' selected, and the 'Users' section is expanded with 'Profiles' selected. The main content area is titled 'User Profiles' and shows a list of profiles. The 'Sales EverReady' profile is highlighted, and the 'Edit' button is visible.

Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	☐
Edit	Chatter Free User	Chatter Free	☐
Edit	Chatter Moderator User	Chatter Free	☐
Edit	Contract Manager	Salesforce	☐
Edit	CPQ Integration User	CPQ Integration User	☐
Edit	Identity User	Identity	☐
Edit	Marketing User	Salesforce	☐
Edit	Minimum Access - Salesforce	Salesforce	☐
Edit / Del	Read Only	Salesforce	☒
Edit / Del	Sales EverReady	Salesforce	☒
Edit	Salesforce API Only System Integrations	Salesforce Integration	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐

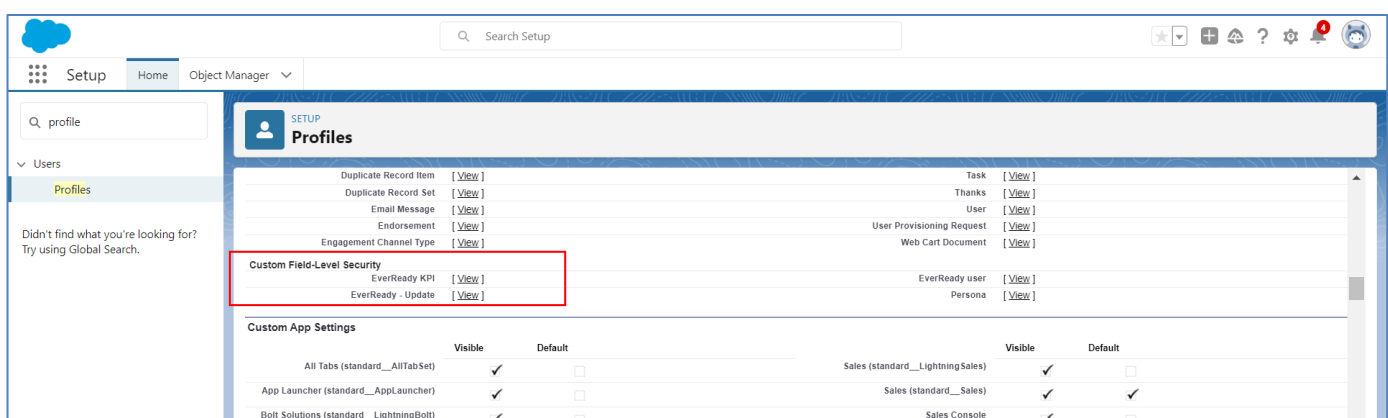
3 - Scroll down to the "Custom Objects Permissions" section and check the boxes as below.



The screenshot shows the 'Custom Objects Permissions' section for the 'Sales EverReady' profile. The 'EverReady KPI' and 'EverReady - Updates' fields are highlighted with a red box. The 'Session Settings' and 'Password Policies' sections are also visible.

Object	Read	Create	Edit	Delete	View All	Modify All
Customers	☒	☒	☒	☒	☐	☐
Data Use Legal Bases	☒	☒	☒	☒	☐	☐
Data Use Purposes	☒	☐	☒	☒	☐	☐
Documents	☒	☒	☒	☒	☐	☐
Duplicate Record Sets	☐	☐	☐	☐	☐	☐
Social Posts	☒	☒	☒	☒	☐	☐
Solutions	☒	☒	☒	☒	☐	☐
Streaming Channels	☒	☒	☒	☒	☐	☐
User External Credentials	☐	☐	☐	☐	☐	☐
Web Cart Documents	☐	☐	☐	☐	☐	☐
Custom Object Permissions						
EverReady KPI	☒	☒	☒	☒	☒	☐
EverReady - Updates	☒	☒	☒	☒	☒	☐
Personas	☒	☒	☒	☒	☒	☐

4 – Leave edit mode and go back in read mode on the profile page
Find Custom Field-Level Security section (you may use search “field”)
You have to configure both “EverReady KPI” & “EverReady – Update” fields.
For that click on “[View]

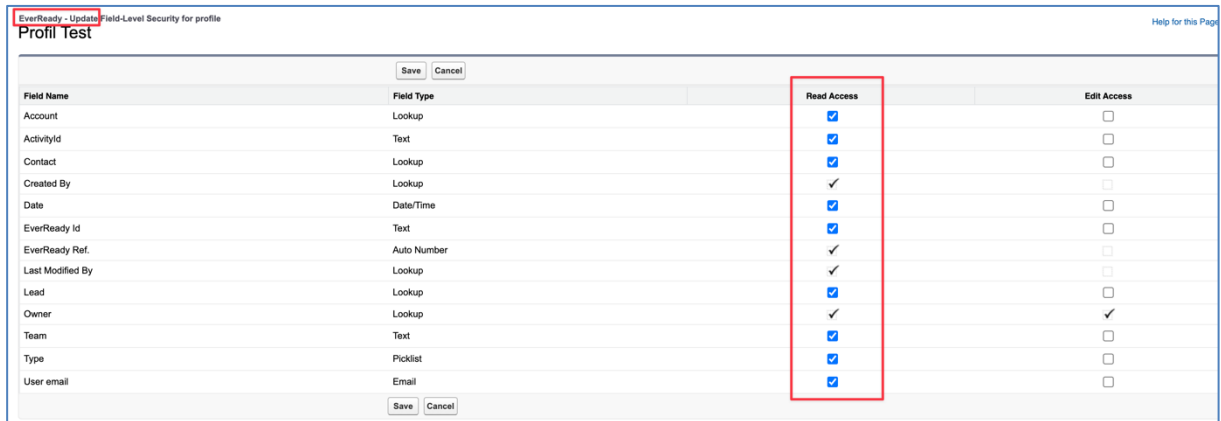


The screenshot shows the 'Custom Field-Level Security' section for the 'Sales EverReady' profile. The 'EverReady KPI' and 'EverReady - Update' fields are highlighted with a red box. The 'Custom App Settings' section is also visible.

Field	Visible	Default
EverReady KPI	☒	☐
EverReady - Update	☒	☐

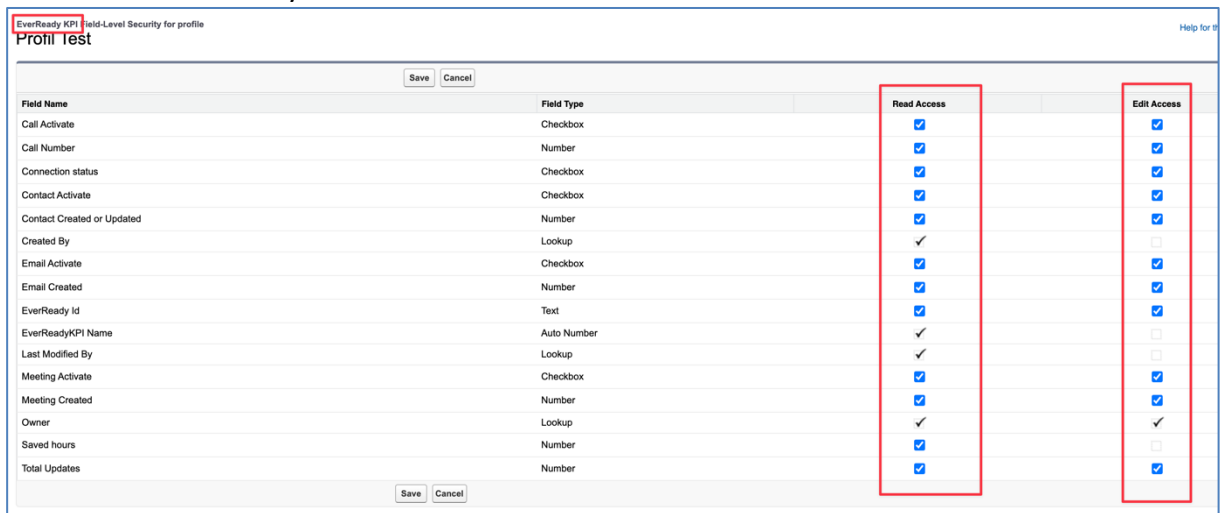
5 - Be sure to check the boxes as below

- For "EverReady Update"



Field Name	Field Type	Read Access	Edit Access
Account	Lookup	☒	☐
ActivityId	Text	☒	☐
Contact	Lookup	☒	☐
Created By	Lookup	☒	☐
Date	Date/Time	☒	☐
EverReady Id	Text	☒	☐
EverReady Ref.	Auto Number	☒	☐
Last Modified By	Lookup	☒	☐
Lead	Lookup	☒	☐
Owner	Lookup	☒	☒
Team	Text	☒	☐
Type	Picklist	☒	☐
User email	Email	☒	☐

- For "EverReady KPI"

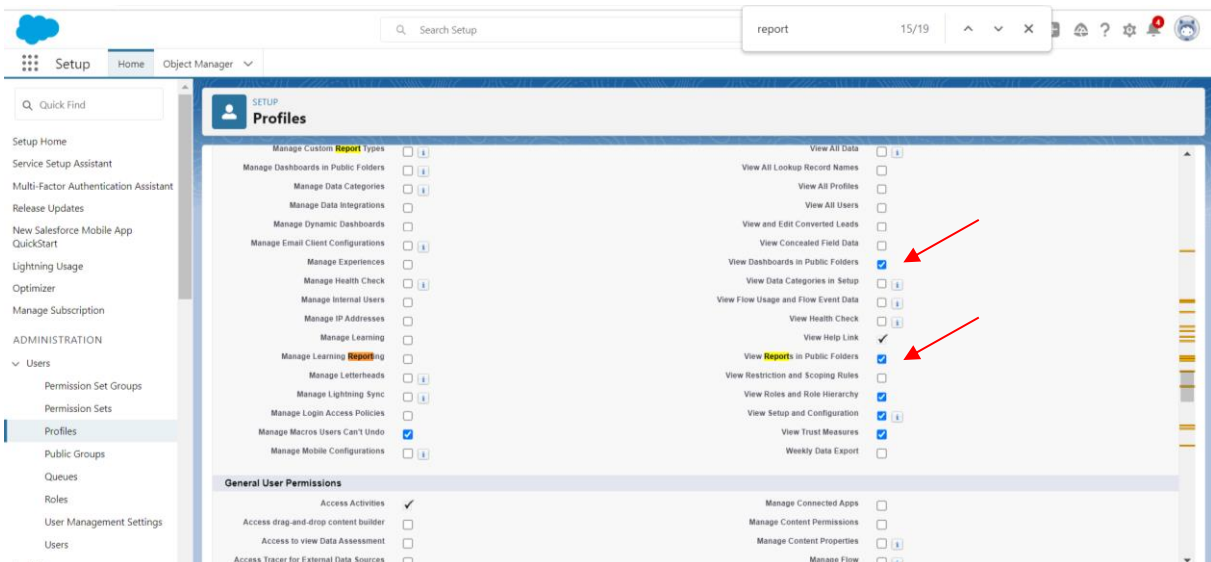


Field Name	Field Type	Read Access	Edit Access
Call Activate	Checkbox	☒	☒
Call Number	Number	☒	☒
Connection status	Checkbox	☒	☒
Contact Activate	Checkbox	☒	☒
Contact Created or Updated	Number	☒	☒
Created By	Lookup	☒	☐
Email Activate	Checkbox	☒	☒
Email Created	Number	☒	☒
EverReady Id	Text	☒	☒
EverReadyKPI Name	Auto Number	☒	☐
Last Modified By	Lookup	☒	☐
Meeting Activate	Checkbox	☒	☒
Meeting Created	Number	☒	☒
Owner	Lookup	☒	☒
Saved hours	Number	☒	☐
Total Updates	Number	☒	☒

That's it! All users associated with this profile now have access to the EverReady App 👍

6 - As an option, you can also give the user access to the Dashboard view, by checking:

- View reports in public folders
- View Dashboards in public folders



Setup Home | Service Setup Assistant | Multi-Factor Authentication Assistant | Release Updates | New Salesforce Mobile App QuickStart | Lightning Usage | Optimizer | Manage Subscription | ADMINISTRATION | Users | Permission Set Groups | Permission Sets | Profiles | Public Groups | Queues | Roles | User Management Settings | Users

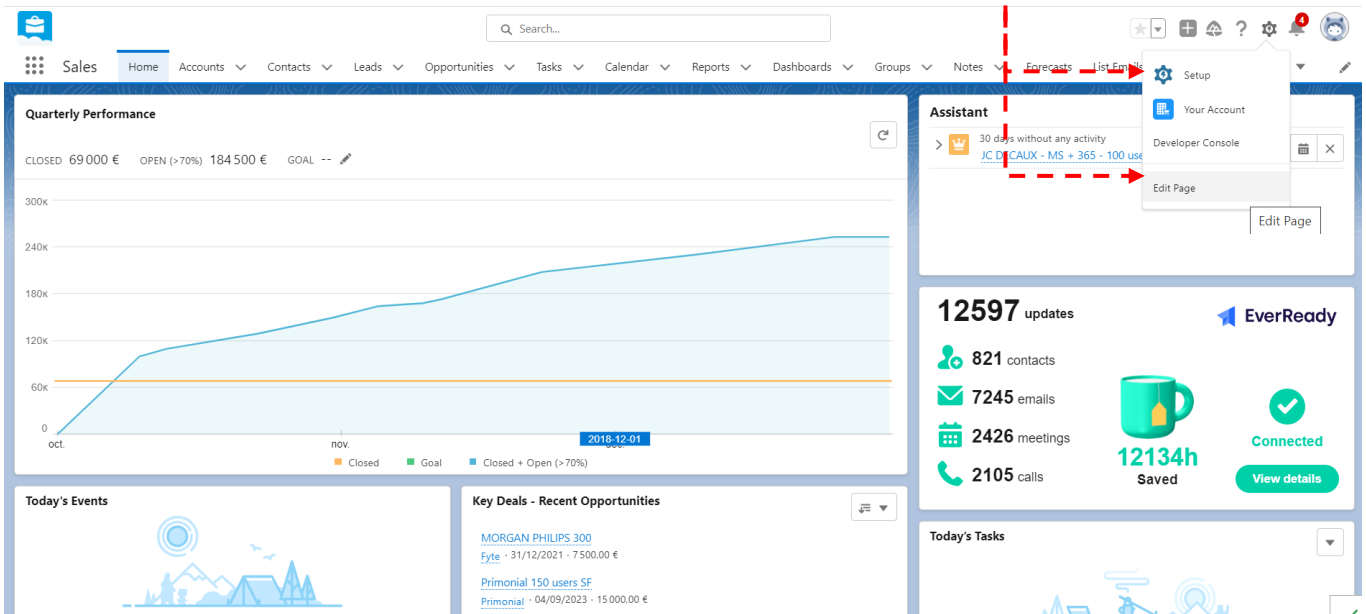
Manage Custom Report Types ☒ | Manage Dashboards in Public Folders ☒ | Manage Data Categories ☒ | Manage Data Integrations ☐ | Manage Dynamic Dashboards ☐ | Manage Email Client Configurations ☒ | Manage Experiences ☐ | Manage Health Check ☒ | Manage Internal Users ☐ | Manage IP Addresses ☐ | Manage Learning ☐ | Manage Learning Reporting ☒ | Manage Letterheads ☒ | Manage Lightning Sync ☒ | Manage Login Access Policies ☐ | Manage Macros Users Can't Undo ☒ | Manage Mobile Configurations ☒ | View All Data ☒ | View All Lookup Record Names ☐ | View All Profiles ☐ | View All Users ☐ | View and Edit Converted Leads ☐ | View Concealed Field Data ☐ | View Dashboards in Public Folders ☒ | View Data Categories in Setup ☒ | View Flow Usage and Flow Event Data ☒ | View Health Check ☒ | View Help Link ☒ | View Reports in Public Folders ☒ | View Restriction and Scoping Rules ☐ | View Roles and Role Hierarchy ☒ | View Setup and Configuration ☒ | View Trust Measures ☒ | Weekly Data Export ☐ | Access Activities ☒ | Access drag-and-drop content builder ☐ | Access to view Data Assessment ☐ | Access Tracer for External Data Sources ☐ | Manage Connected Apps ☐ | Manage Content Permissions ☐ | Manage Content Properties ☒ | Manage Flow ☒

3 – Install the Widget on your Home Page

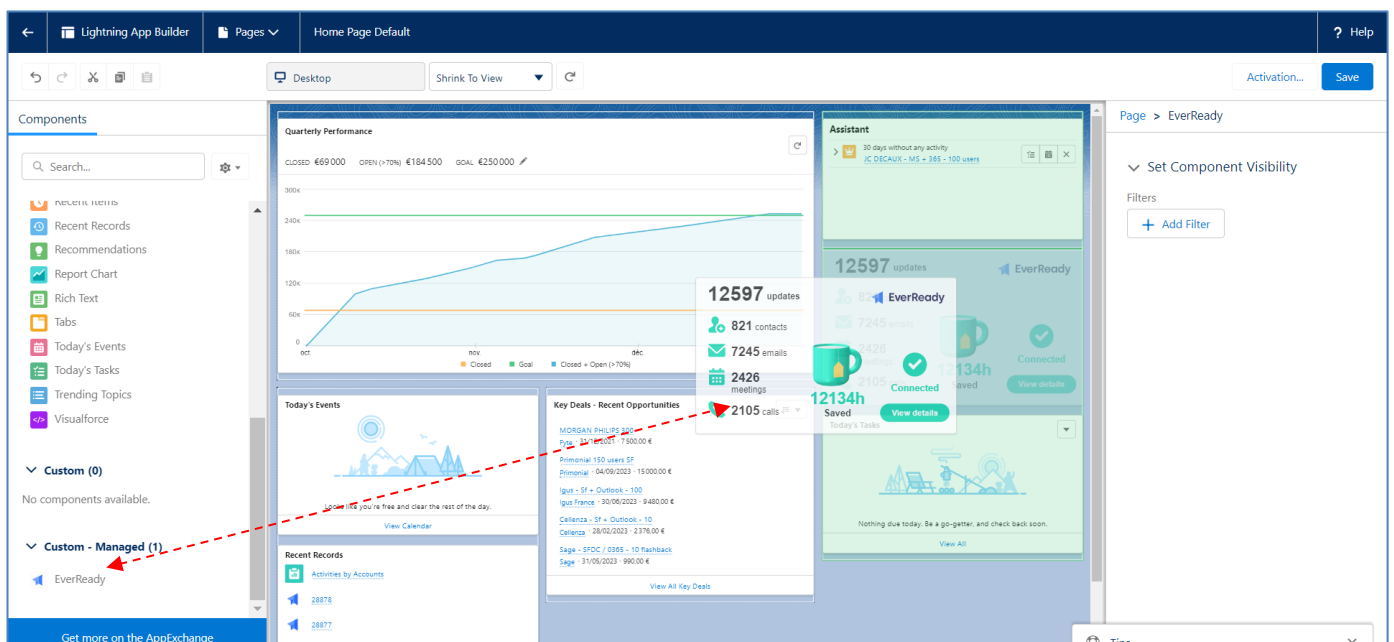
Edit a Page to Add a Lightning Component

Important: The screen captures in the steps below focuses in on adding the ‘EverReady’ component. However, these same steps can be used to select and add any Lightning component.

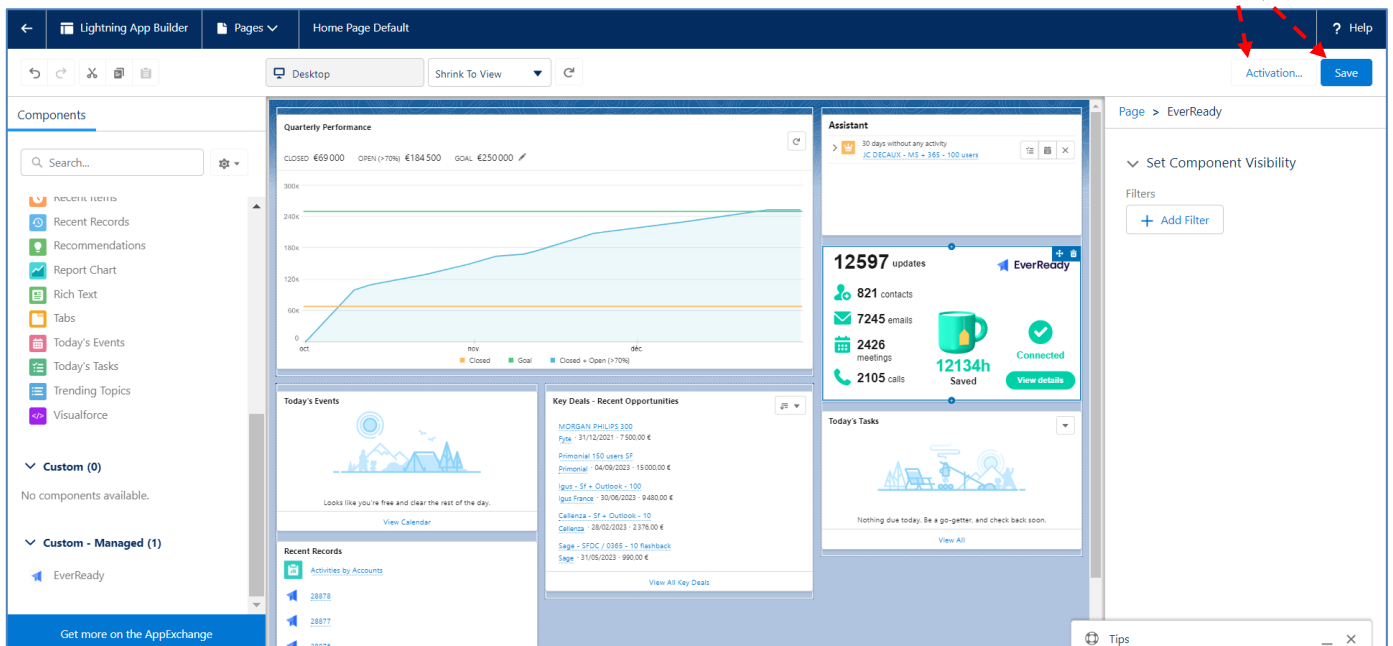
1. Go to your Home Page.
2. Click the **Gear icon (Setup)** and select **Edit Page**. =====



Lightning components are displayed in the left navigation pane. You can use the search bar to find EverReady, or scroll down, it is located in Custom - Managed. From there, **simply drag and drop the EverReady component** to the location of your choice on your homepage.

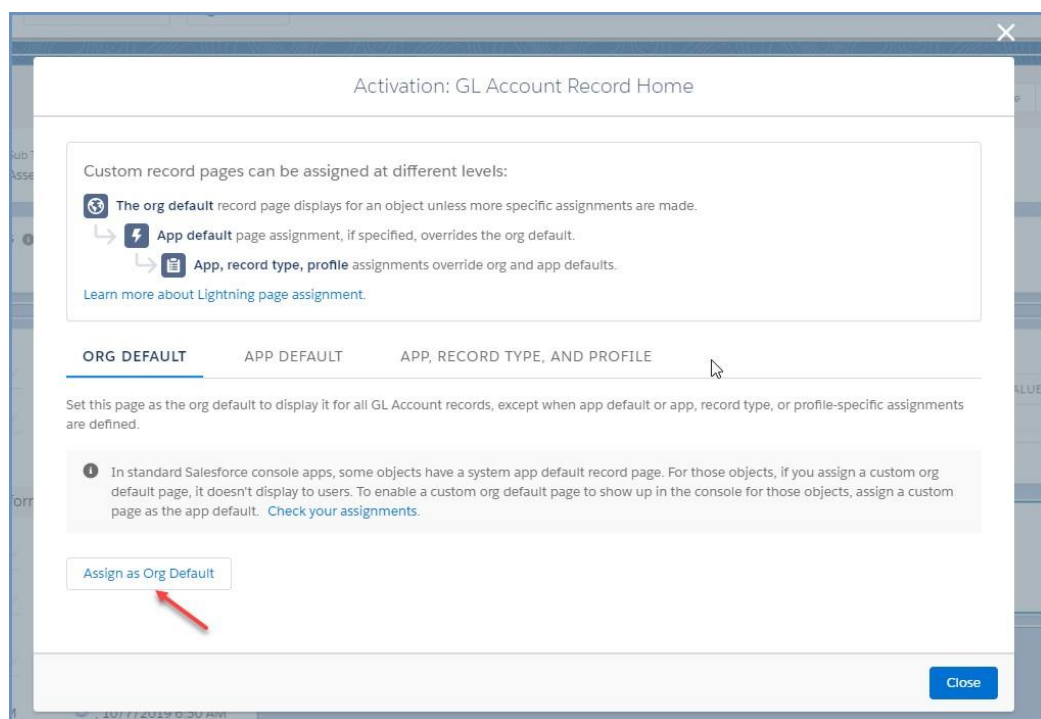


Click "Save" & "Activation"



After clicking on "Activation", make sure you activate the EverReady component for all your users.

Click "Assign as Org Default" Button



Then click “**Next**” & “**Save**”.

Assign form factor

Select the form factors that you want your org default page to be available for.

☒ Desktop

☐ Phone

☐ Desktop and phone

[Cancel](#)

[Back](#)

[Next](#)

Use the back arrow in the upper left corner to exit the edition mode.

Congratulations 🙌 EverReady is now displayed on your home page 🚀

