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AllAi Productivity by OSF Digital

Installation Guide

Installation Guide V 1.0.0

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AllAi Productivity by OSF Digital

MAXIMIZE PRODUCTIVITY AND ENHANCE EFFICIENCY

An AI-powered platform for Salesforce professionals to maximize productivity, enhance efficiency, collaboration, and time to market. Manage AllAI tools adoption from your SF org. Save time on troubleshooting and enable focus on building and increase value.

AllAi Productivity platform provides you with important information as an AI-powered suite designed for Salesforce professionals, with Salesforce reports and dashboards capabilities for managing users' adoption and trends.

1. Pre-Requisites

Before installing the package, please make sure that you or your company has acquired Visual Studio Code that is external to Salesforce for this solution to work.

NOTE: Visual Studio Code is a free platform to manage and build code.

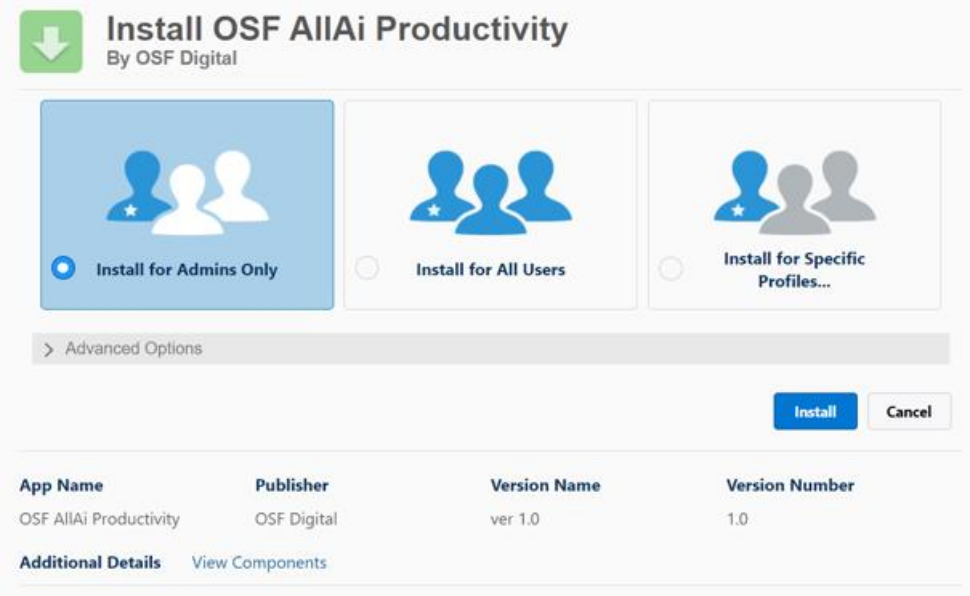
2. Installing the Application

1. Access AllAi Productivity on AppExchange
2. Click **Get It Now** on the AppExchange page
3. Choose where you want to install the application:
   - In your production environment, or
   - In the sandbox environment

   You will be able to choose by clicking one of the available buttons.
4. After clicking one of the buttons, you will be redirected to a page, where you are provided with information about the package installation.
5. Check the box in front of **I have read and agree to the terms & conditions**;
6. Click **Confirm and Install.**

Important: We recommend that before proceeding with installation you read the User Guide, which is available by clicking the link on the AppExchange page. Navigate to: **AllAi Productivity on AppExchange page** > **More Details** > **Resources & Documentation** > **AllAi Productivity User Guide**

7. You will be prompted to select the users you want the app to be available for in your Salesforce org.



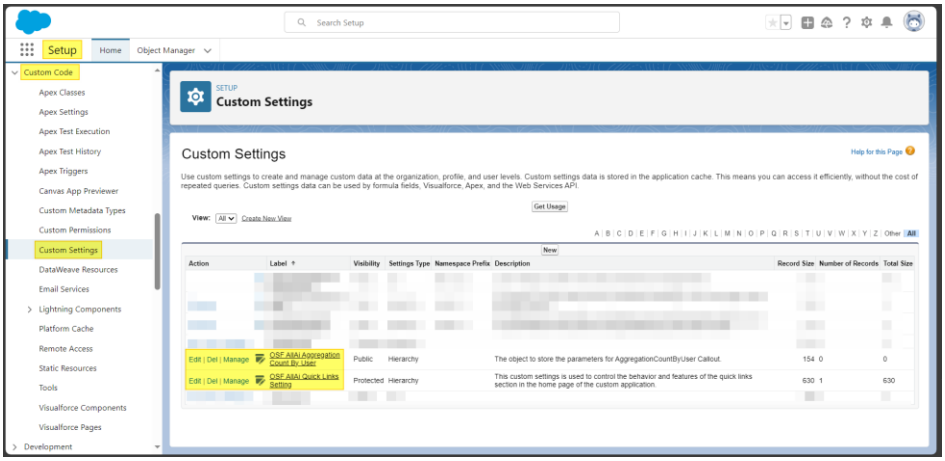
8. Once the app is installed, click **Done** to finalize the process.

2.1 Initial Setup

After installation of the package, the System Administrator must perform the following setup to have it working properly.

Update the Custom Settings
This package has two different custom settings, that is the System Administrator should update the values.

1. In the org, go to "Setup".
2. In the "Quick Find", type "custom settings".
3. Select "Custom Code | Custom Settings".



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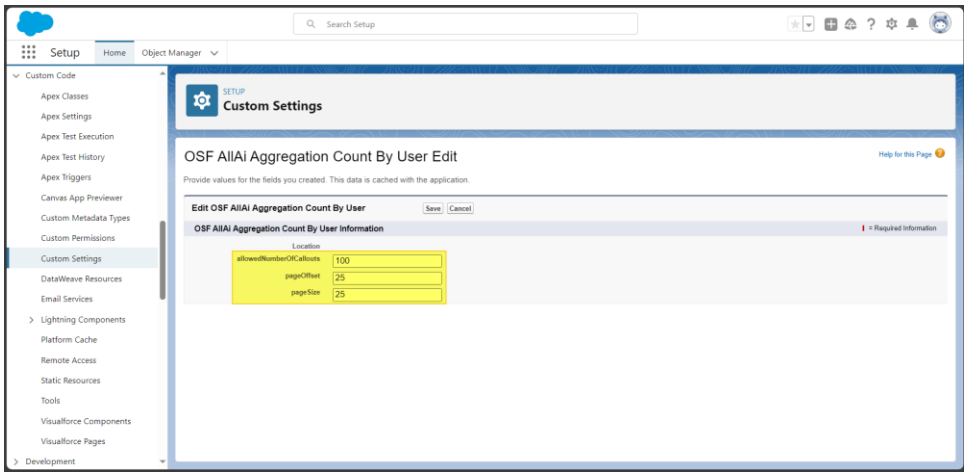
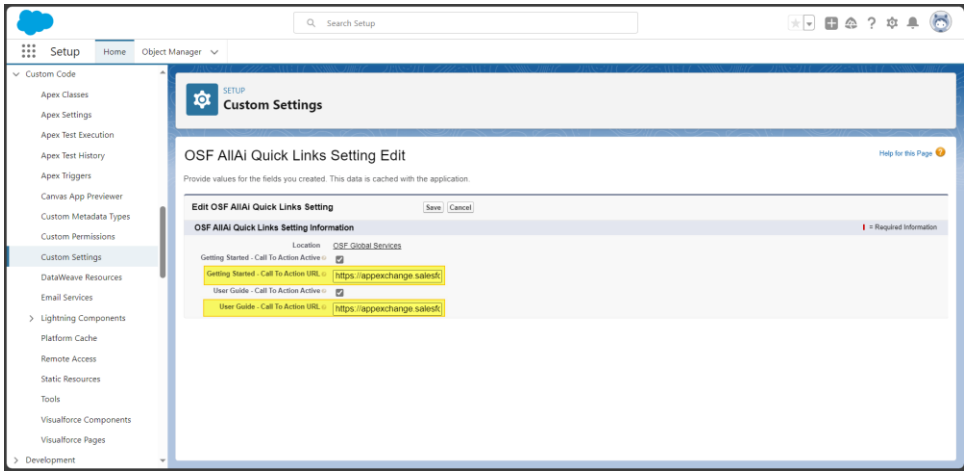
4. Click on "Manage" option of "OSF AllAi Aggregation Count By User".
    a. Create a default organization level value.
    b. Assign these following values:
        i. allowedNumberOfCallouts: 100
        ii. pageOffset: 25
        iii. pageSize: 25



5. Go back to the Custom Settings and click on "Manage" option of "OSF AllAi Quick Links Setting".
    a. Create a default organization level value.
    b. Assign these following values:
        i. Getting Started - Call To Action URL: according to the OSF Digital contact support (contact the OSF Digital team to get the right URL).
        ii. User Guide - Call To Action URL: according to the OSF Digital contact support (contact the OSF Digital team to get the right URL).



Security Token

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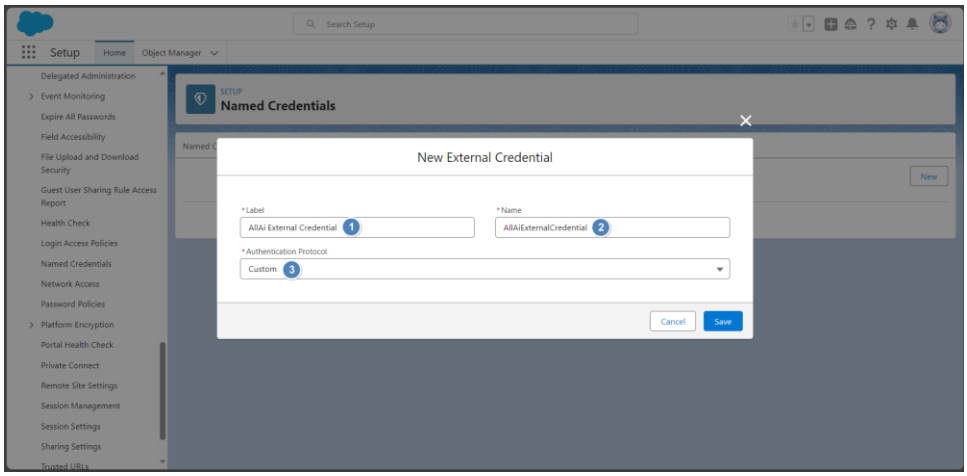
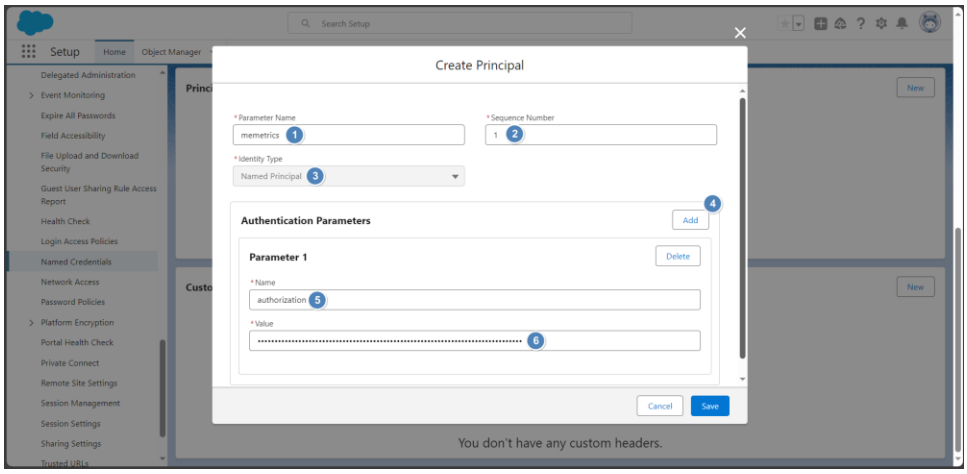
This package runs a callout to the OSF AllAi Platform services, so in order to allow this package to execute this callout it is necessary that the System Administrator create the named credentials and external credentials.

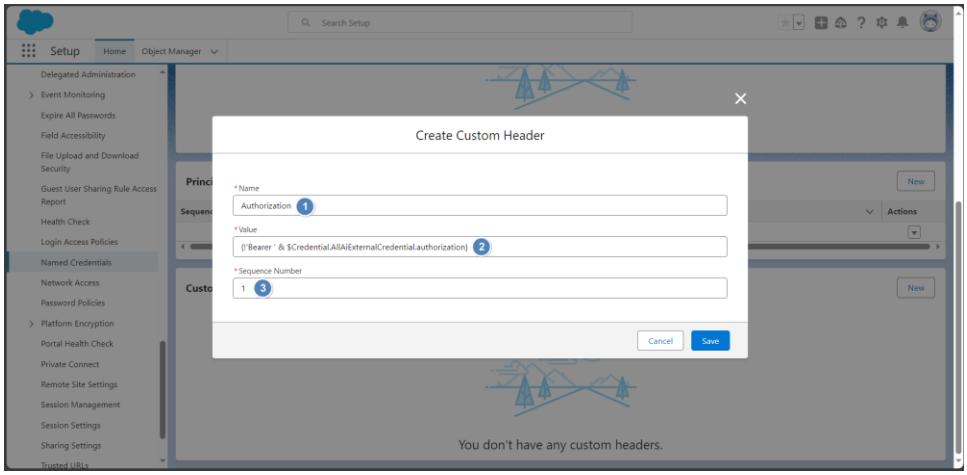
1. In the org, go to "Setup".
2. In the "Quick Find", type "named credentials".
3. Select "Security | Named Credentials".
4. Create new "External Credentials".
    a. Assign these following values:
        i. Label: AllAi External Credential
        ii. Name: AllAiExternalCredential
        iii. Authentication Protocol: Custom



    b. Into the external credential, create new "Principals".
        i. Assign these following values:
            1. Parameter Name: memetrics
            2. Sequence Number: 1
            3. Identity Type: Named Principal
        ii. Into the new "Principal" create a new "Authentication Parameters".
            1. Assign these following values:
                a. Name: authorization
                b. Value: the security token provided by OSF Digital.



c. Into the external credential, create new "Custom Headers".
   i. Assign these following values:
      1. Name: Authorization
      2. Value: {!'Bearer ' & $Credential.AllAiExternalCredential.authorization}
      3. Sequence Number: 1



5. Go back to "Security | Named Credentials".
6. Create new "Named Credentials".
   a. Assign these following values:
      i. Label: AllAi Named Credential
      ii. Name: AllAiNamedCredential
      iii. URL: https://memetrics.teialabs.com.br
      iv. Enabled for Callouts: checked
      v. External Credential: AllAiExternalCredential
      vi. Generate Authorization Header: checked
      vii. Allow Formulas in HTTP Header: checked
      viii. Allow Formulas in HTTP Body: unchecked
      ix. Allowed Namespaces for Callouts: osf_allai

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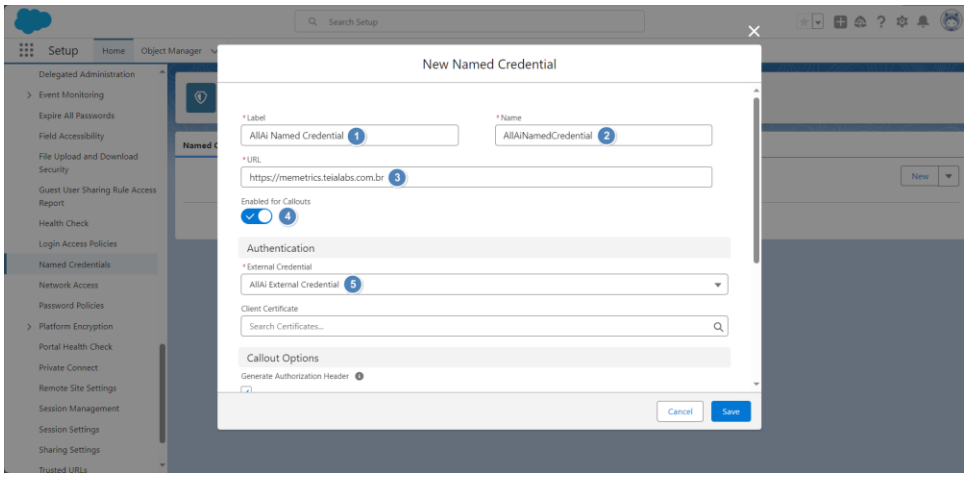
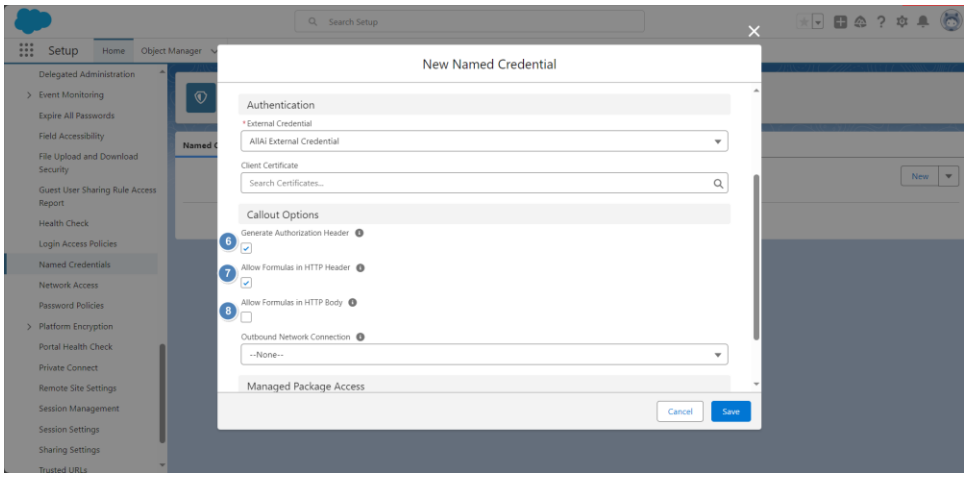
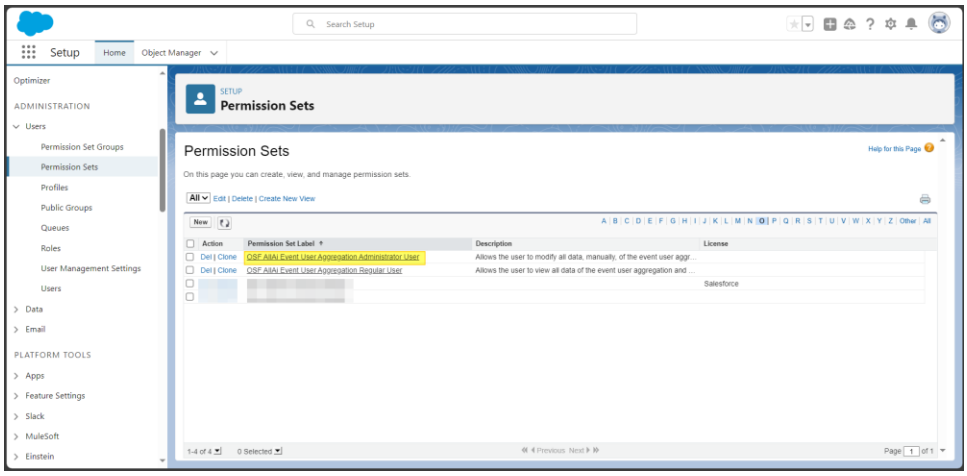




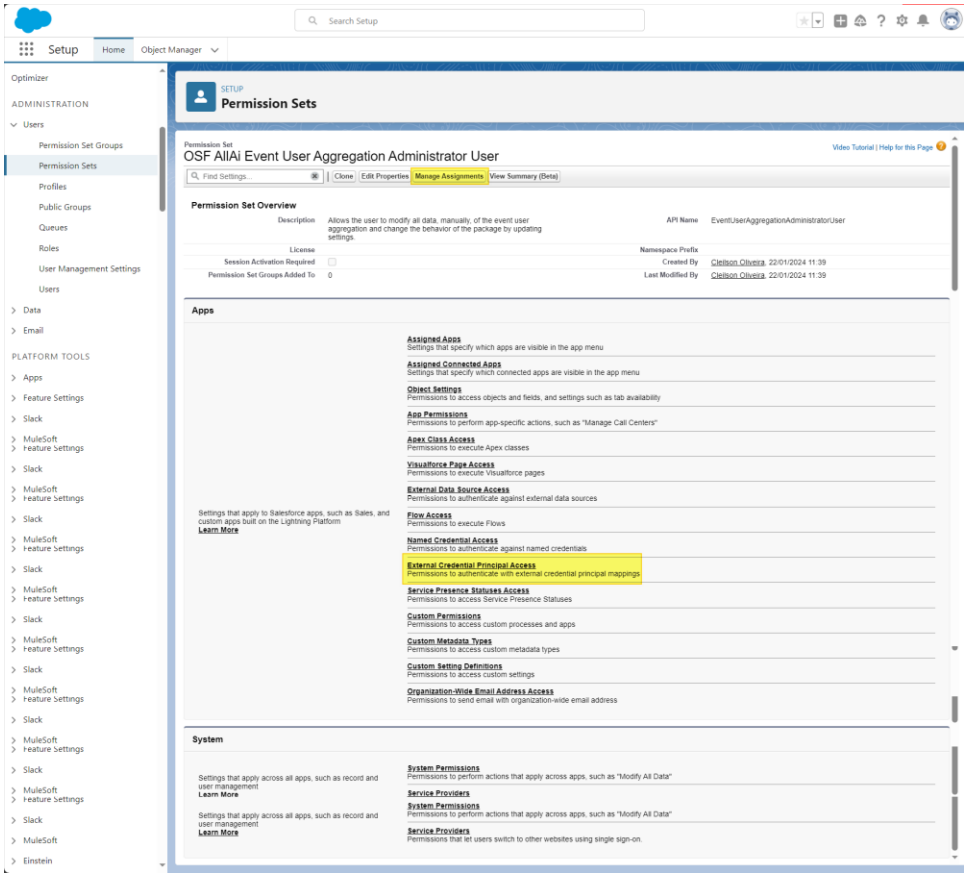
Permission Sets

Now it is time to update the permission set to allow use the just created named credentials and assign users to the permission sets contained in the managed package.

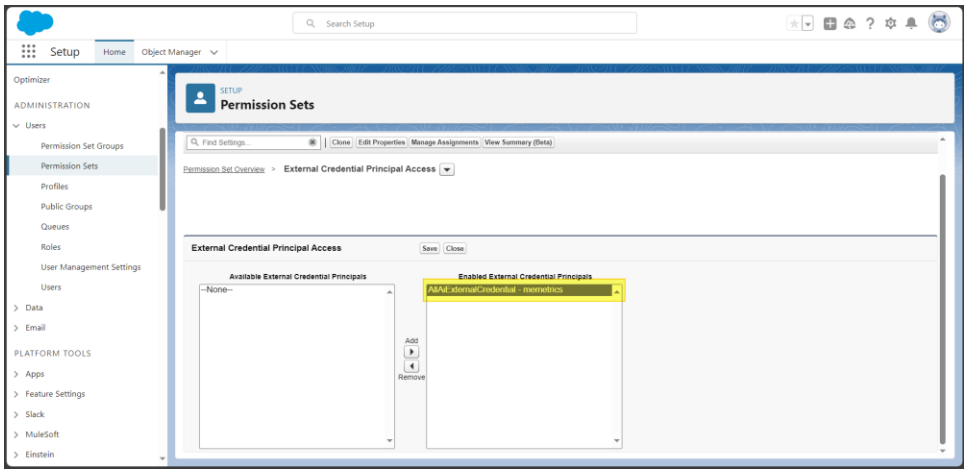
1. In the org, go to "Setup".
2. In the "Quick Find", type "permission sets".
3. Select "Users | Permission Sets".
4. Clone the permission set "OSF AllAi Event User Aggregation Administrator User".
    a. Label: OSF AllAi Event User Aggregation Administrator User Local
    b. API Name: EventUserAggregationAdministratorUserLocal



5. Into the cloned permission set click on "Manage Assignments" to assign users that you want to be administrators of this package.
    a. We recommend assigning this permission set to the System Administrator.



6. In the cloned permission set click on "External Credential Principal Access".
    a. Move the external credential "AllAiExternalCredential – memetrics" from left to right.

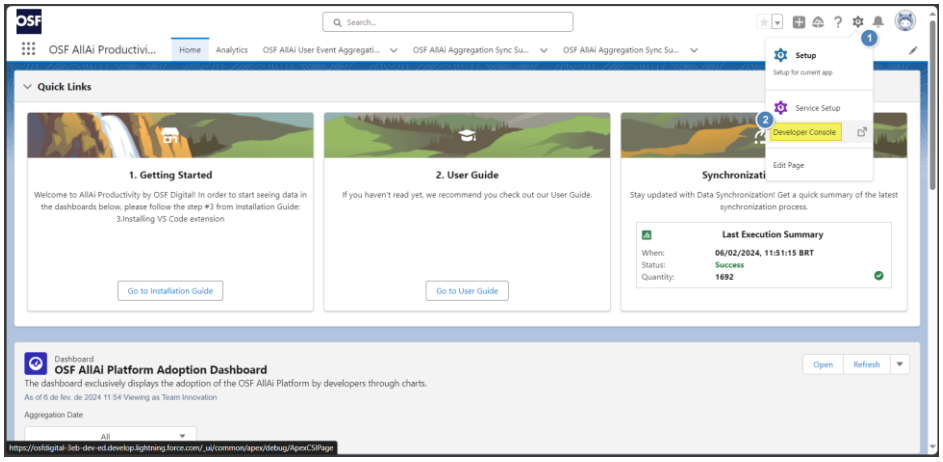


Scheduled Job

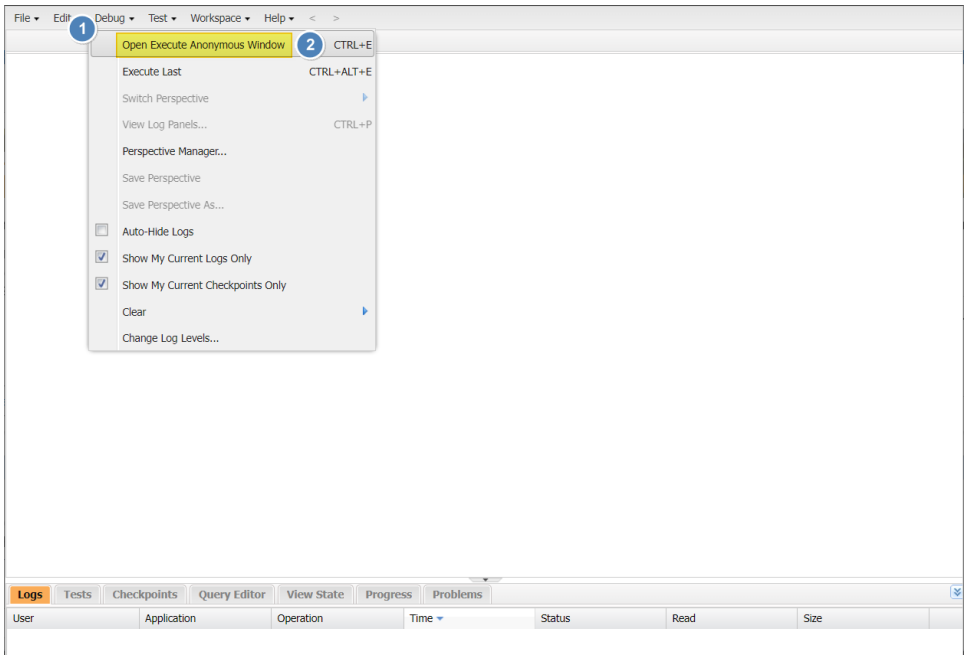
To automatically synchronize the data between the OSF AllAi Productivity Platform and your org, the package provides a scheduled job.

Then it is necessary to manually schedule this job. So, follows these steps bellow:

1. In the org, go to "Setup | Developer Console".



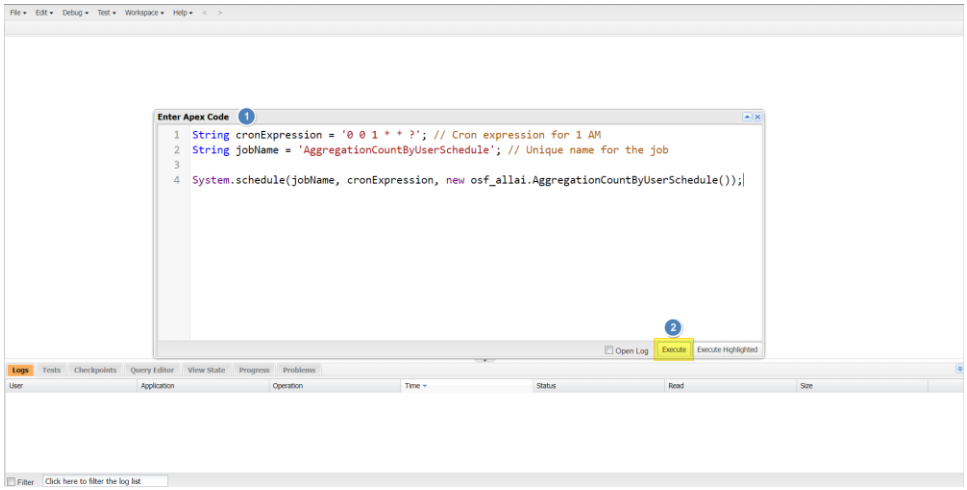
2. In the "Developer Console", go to "Open Execute Anonymous Window".



3. In the "Enter Apex Code" window, write the code below and click on "Execute".

```
String cronExpression = '0 0 1 * * ?'; // Cron expression for 1 AM
String jobName = 'AggregationCountByUserSchedule'; // Unique name for the job


System.schedule(jobName, cronExpression, new
osf_allai.AggregationCountByUserSchedule());
```

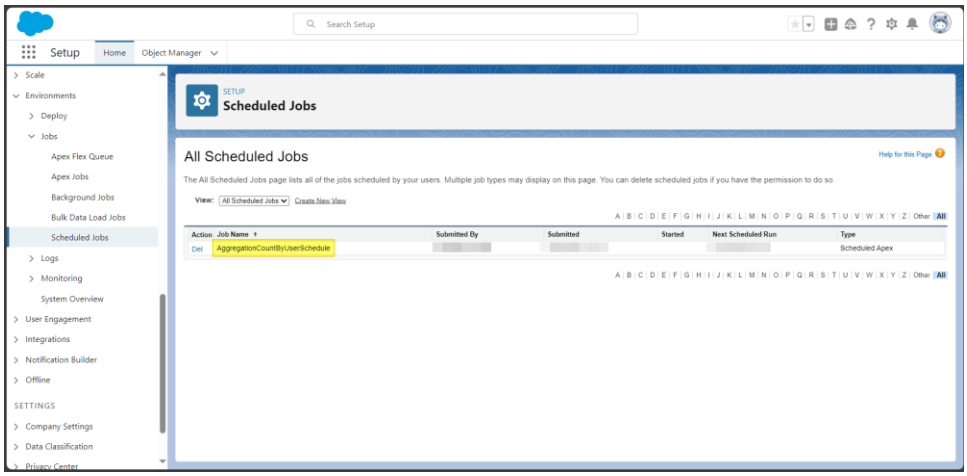


4. Close the "Developer Console".

To check or change or remove the schedule for the synchronization job you can follow these steps below:

1. In the org, go to "Setup".
2. In the "Quick Find", type "scheduled jobs".

3. Select "Environments | Jobs | Scheduled Jobs".



3. Installing Visual Code Extension

Now that you have AllAi Productivity AppExchange installed in your org, to start seeing data in the OSF AllAi Productivity Home Page dashboards, you need to contact OSF Digital through e-mail allai@osf.digital to sign the contract and provide users' e-mail address.

Please be aware that you may leverage 30 days of free trial. After that, you or your company should proceed with payment through your company's AppExchange access to continue leveraging AllAi Productivity platform.

Once contract is signed and developers' email addresses are set up within OSF Digital system, developers* need to install AllAi Code Extension in Visual Studio Code, following this link: OSF Digital - AllAi Code - Visual Studio Marketplace.

*All Salesforce developers in any industry are the target users to leverage AllAi Productivity – Code functionality, acting as a VS Code extension, helping them write better and faster code.

1. Click **Install** on the VS Code Marketplace page

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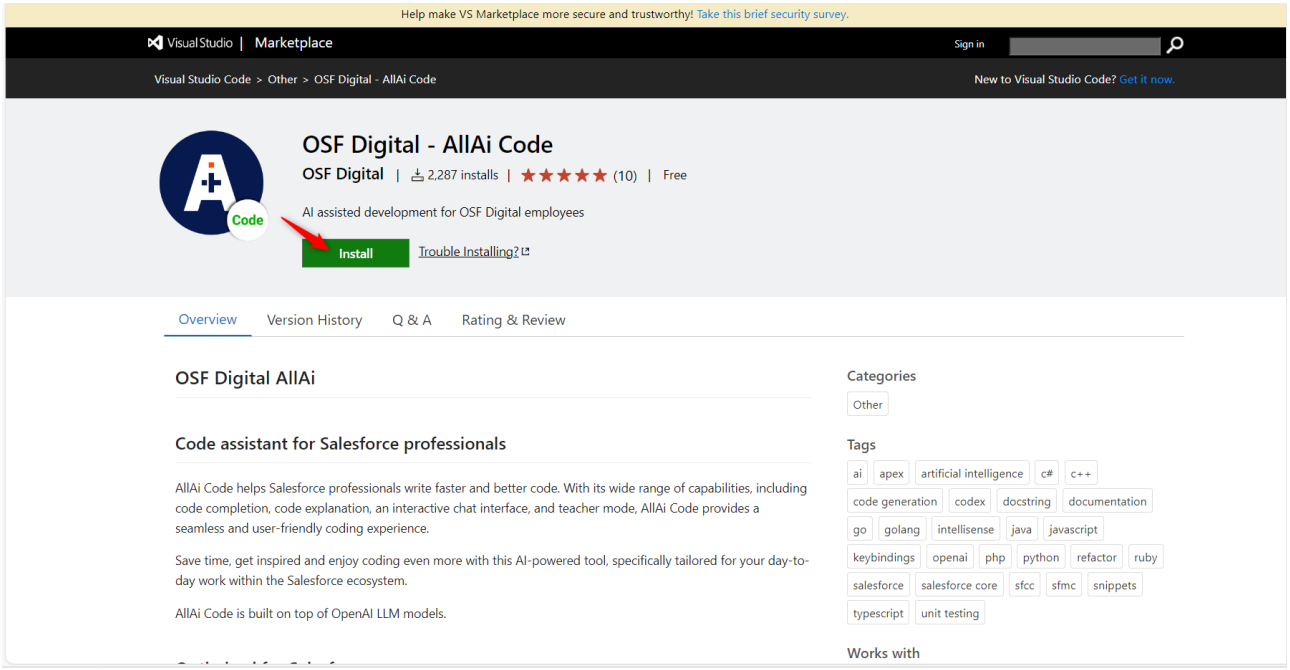
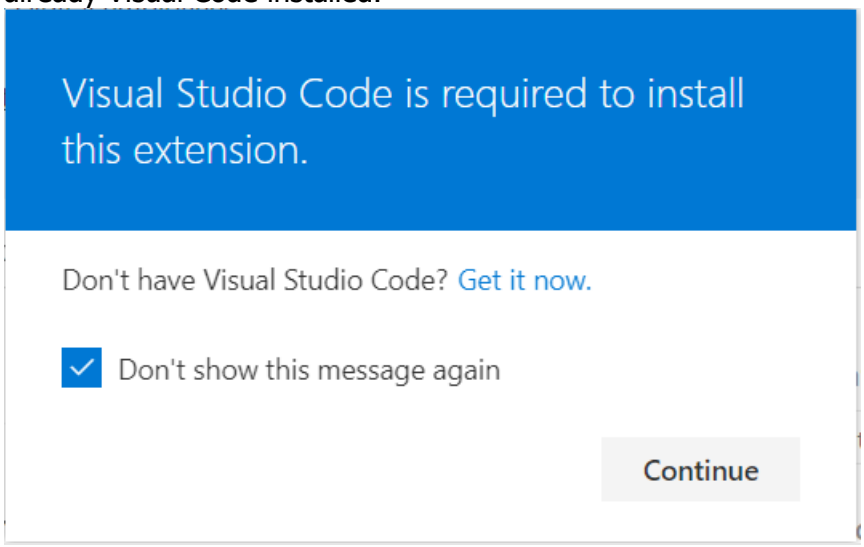
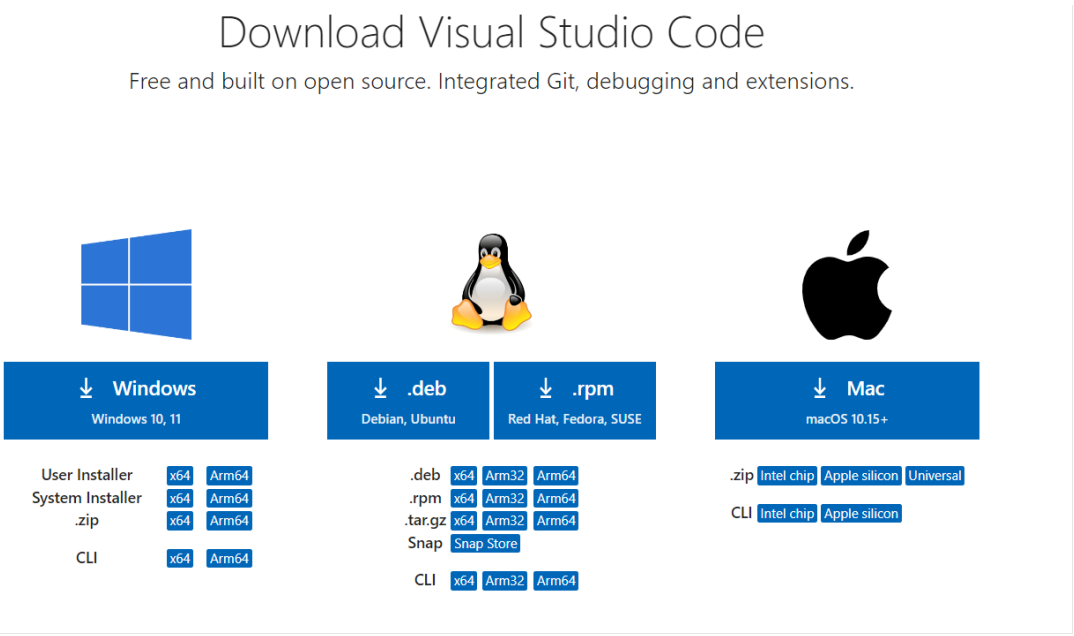


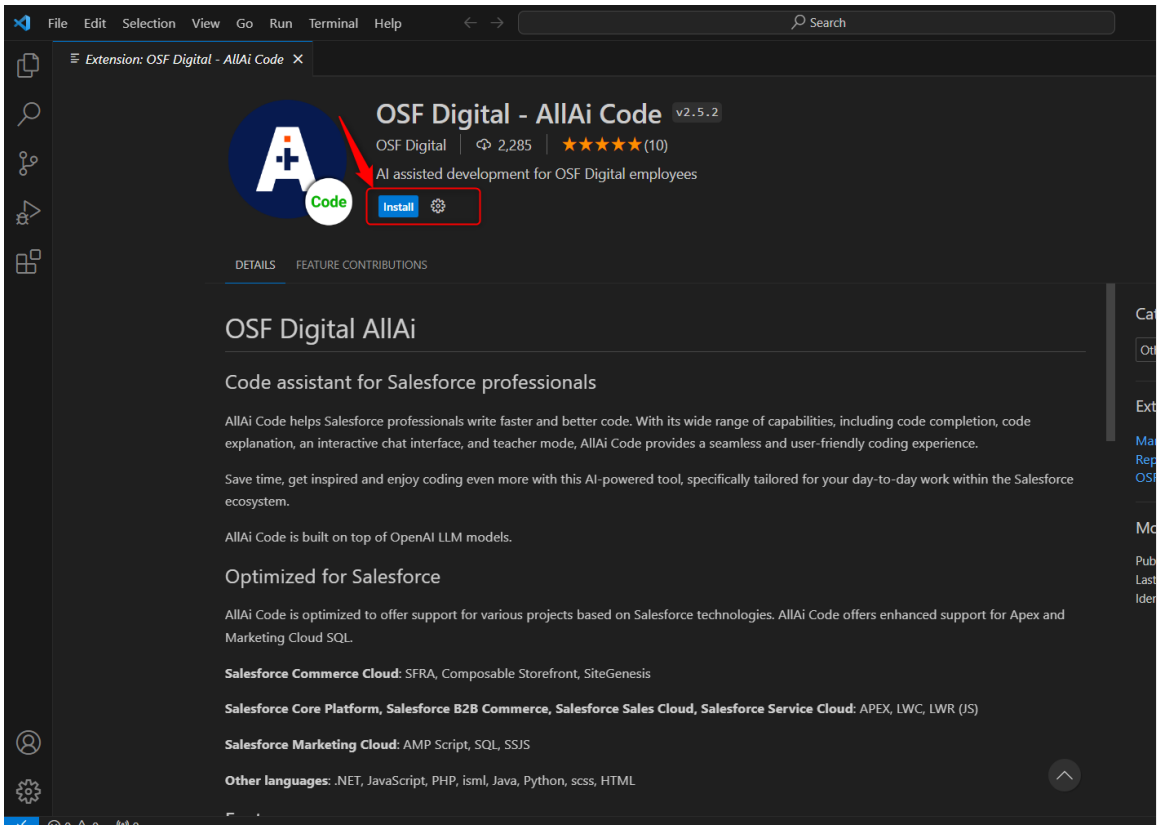
2. A pop-up window will show up to require Visual Studio Code download to install AllAi Code extension. You may either click on **Get it now** in case you or your company did not acquire it yet or click on **Continue** if you or your company have already Visual Code installed.



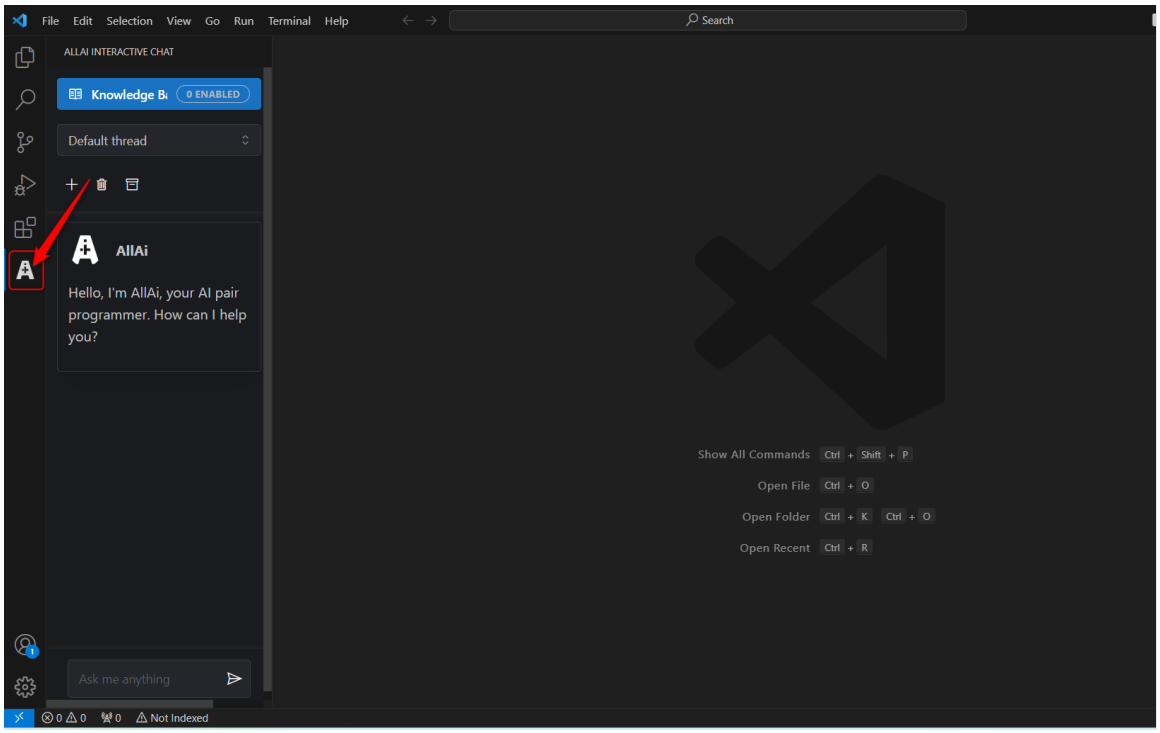
If you do not have VS Code installed: Choose the best option to download Visual Studio Code from VS Code page



3. Once you completely installed Visual Studio Code on your computer, click again on **Install** on the VS Code Marketplace page to initiate installation of AllAi Code extension in your VS Code
4. After that, click on **Install** within VS Code



5. Once VS Code extension installation is completed, you will be able to access it by clicking on the icon  on the left side of the page



6. Click on the **Accounts** button. Click **Sign in with OSF Digital to use OSF Digital – AllAi Code** and go to the browser. Follow the instructions in your browser and complete the authentication.

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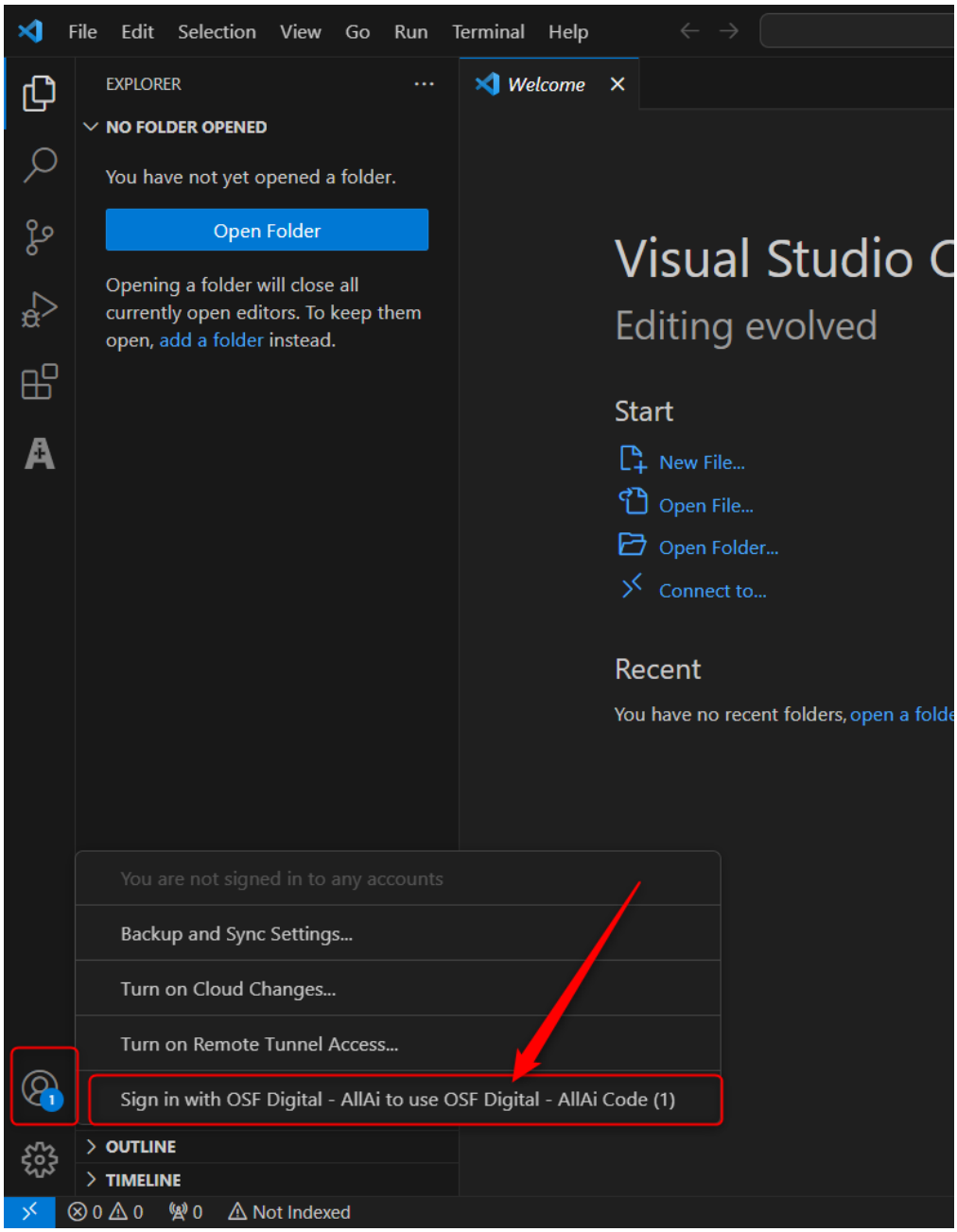

Congratulations! You have completed the installation process and may now leverage all the benefits of AllAi Productivity – Code functionality features!

If you have any questions, contact us at allai@osf.digital.