



LSN User Manual Document (Post Installation Steps)

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1 Usage:

- This document shows how to perform the post installation steps of LSN managed package

2 LSN APP Permission Set

Go to Permission Sets -> LSN

Click on Manage Assignments Button

Permission Set
LSN APP

Video Tutorial | Help for this Page ?

Find Settings... Clone Manage Assignments

Permission Set Overview

Description	Permission set to provide access to LSN related components	API Name	LSN_APP
License		Namespace Prefix	LSNGPC
Session Activation Required	☐	Created By	LSN_TestApp2, 4/28/2023, 9:14 PM
Last Modified By	LSN_TestApp2, 4/28/2023, 9:14 PM		

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Click on Add Assignment Button


... > SETUP > PERMISSION SET 'LSN APP'


LSN APP

Current Assignments



[Add Assignment](#)



Select the user and click on Next button

Select Users to Assign


All Users

1 item selected





☐	Full Name ↑	Alias	Username	Role	Active	Profile
☐	 Chatter Expert	Chatter	chatty.00ddp000000erytmai.ynfosno9jcha@chatter.salesforce.com		☒	Chatter Free User
☒	 LSN Package Test	ltest	lsnpackagetest@demandblue.com		☒	Package System Administrator
☐	 LSN Test App2	LApp2	lsnapptest2@lsn.com		☒	System Administrator

Cancel

Next

Now click on the Assign button. User will be added to the “LSN APP” Permission Set

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
LSN Package Test		Package System Administrat...	✓	Salesforce	Never Expires

Cancel

Back

Assign

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
LSN Package Test	Salesforce			✓ Success

Done

3 LSN Page Layout Assignment:

Go to Object manager -> Account - > Page Layouts - > Click on Page Layout Assignment

Page Layout Assignment

[Help for this Page](#)

Account

The table below shows the page layout assignments for different profiles.

Edit Assignment	
Profiles	Page Layout
Analytics Cloud Integration User	Account Layout
Analytics Cloud Security User	Account Layout
Chatter External User	Account Layout
Chatter Free User	Account Layout
Chatter Moderator User	Account Layout
Chatter Only User	Account Layout
Company Communities User	Account Layout
Contract Manager	Account Layout
Customer Community Login User	Account Layout
Customer Community Plus Login User	Account Layout
Customer Community Plus User	Account Layout
Customer Community User	Account Layout
External Identity User	Account Layout
High Volume Customer Portal User	Account Layout
Identity User	Account Layout
Marketing User	Account Layout
Minimum Access - Salesforce	Not Assigned
Package System Administrator	Account Layout (Installed Package: Life Science Nation)
Partner Community Login User	Account Layout
Partner Community User	Account Layout
Read Only	Account Layout
Salesforce API Only System Integrations	Account Layout
Solution Manager	Account Layout
Standard Platform User	Account Layout

Click on Edit Assignment

Select the Profile which you want to assign the Page Layout i.e. Account Layout to (Installed Package: Life Science Nation) and click on Save

Page Layout To Use: Account Layout (Installed Package: Life Science Nation) 1 Selected 1 Changed

Profiles	Page Layout
Analytics Cloud Integration User	Account Layout
Analytics Cloud Security User	Account Layout
Chatter External User	Account Layout
Chatter Free User	Account Layout
Chatter Moderator User	Account Layout
Chatter Only User	Account Layout
Company Communities User	Account Layout
Contract Manager	Account Layout
Customer Community Login User	Account Layout
Customer Community Plus Login User	Account Layout
Customer Community Plus User	Account Layout
Customer Community User	Account Layout
External Identity User	Account Layout
High Volume Customer Portal User	Account Layout
Identity User	Account Layout
Marketing User	Account Layout
Minimum Access - Salesforce	Not Assigned
Package System Administrator	<i>Account Layout (Installed Package: Life Science Nation)</i>
Partner Community Login User	Account Layout
Partner Community User	Account Layout
Read Only	Account Layout
Salesforce API Only System Integrations	Account Layout
Solution Manager	Account Layout
Standard Platform User	Account Layout
Standard User	Account Layout

Repeat the same steps for the Contact Layout (Installed Package: Life Science Nation) for the contact as well.

4 LSN Account Lightning Record Page Assignment:

Go to Object Manager -> Account -> Lightning Record Pages -> Account_Record_Page (Managed)

Lightning Page

Account_Record_Page (Managed) [Help for this Page](#)

Lightning Page Detail

▼ Information

Name	Account_Record_Page	Label	Account Record Page
Description	Account Record Page for the LSN		

Assignments By App

No Assignments to display

Assignments By App, Record Type, and Profile

No Assignments to display

[^ Back To Top](#)

Always show me [▼ more](#) records per related list

Click on View -> Click on Activation button -> APP DEFAULT Tab -> Assign as App Default button. Select LSN

Select Apps

Select the Lightning apps to display "Account Record Page" as the app default page.

Lightning Apps (4)	
App Name	Description
☐ LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience
☒ LSN	
☐ Sales	Manage your sales process with accounts, leads, opportunities, and more
☐ Salesforce CMS	Manage content and media for all of your sites.

[Cancel](#)[Back](#)[Next](#)

Click on Next -> Select Form Factor -> Desktop

Select Form Factor

For each app that you assigned this page to as the app default, select the form factor that you want the page to apply to. For example, if you select only the Phone option, then this page will be the app default page for this app only when viewed on a mobile device.

Lightning Apps (1)	
App Name	FORM FACTOR
LSN	☐ Desktop and phone ☒ Desktop ☐ Phone

[Cancel](#)[Back](#)[Next](#)

Click on Next and finally save

Review Assignments

Review the app default assignments to be saved for "Account Record Page".

Review Assignments (1)			
App Name	FORM FACTOR	Current App Default	New App Default
LSN	Desktop	Account Record Page	Account Record Page

[Cancel](#)[Back](#)[Save](#)

5 LSN ToEmailAddress Custom Metadata:

Go to Custom Metadata -> LSN ToEmailAddress


SETUP
Custom Metadata Types

Custom Metadata Type
LSN ToEmailAddress (Managed)
[Help for this Page](#)

 This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

[Standard Fields \(6\)](#) | [Custom Fields \(1\)](#) | [Validation Rules \(0\)](#) | [Page Layouts \(1\)](#)

Custom Metadata Type Detail
[Edit](#) [Manage LSN ToEmailAddresses](#)

Singular Label	LSN ToEmailAddress	Description	Created by demandblue to store the To Email Address for Daily Sync Operation.
Plural Label	LSN ToEmailAddresses	Visibility	Public
Object Name	LSN_ToEmailAddress	Protection Level	
Namespace Prefix	LSNGPC	Record Size	181
API Name	LSNGPC__LSN_ToEmailAddress__mdt		
Created By	LSN_TestApp2, 4/28/2023, 9:14 PM	Modified By	LSN_TestApp2, 4/28/2023, 9:14 PM

Package Information

Installed Package	Life Science Nation	Available in Versions	1.0 - Current
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Standard Fields

Action	Field Label	Field Name	Data Type	Indexed
	Created By	CreatedBy	Lookup(User)	
Edit	Custom Metadata Record Name	DeveloperName	Text(40)	
Edit	Label	MasterLabel	Text(40)	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Namespace Prefix	NamespacePrefix	Text	
Edit	Protected Component	IsProtected	Checkbox	

Custom Fields
[New](#)

Click on Manage LSNToEmailAddresses Button

LSN ToEmailAddresses
[Help for this Page](#)

View: [All](#) [Create New View](#)

[New](#)

Action	Label	LSN ToEmailAddress Name	Namespace Prefix
Edit	 useremail	useremail	LSNGPC

Click on Edit

LSN ToEmailAddress (Managed)

Help for this Page

This LSN ToEmailAddress is managed, meaning that you may only edit certain attributes. [Display More Information](#)

LSN ToEmailAddress Edit

Save

Save & New

Cancel

Information

Label

useremail

Namespace Prefix

LSNGPC

LSN ToEmailAddress Name

useremail

ToAddress

lpgc@lifesciencenation.com

Save

Save & New

Cancel

Change the ToAddress value to your company's email address for receiving the success and error emails related to the LSN Managed Package