

# Networkabl App - Installation Guide

## About

This guide is designed to support the installation of the Networkabl App on the Salesforce platform. The following steps are critical to the successful installation of the application and the relevant steps to configure its functionality.

*NB: All setup sets are in Lightning Experience.*

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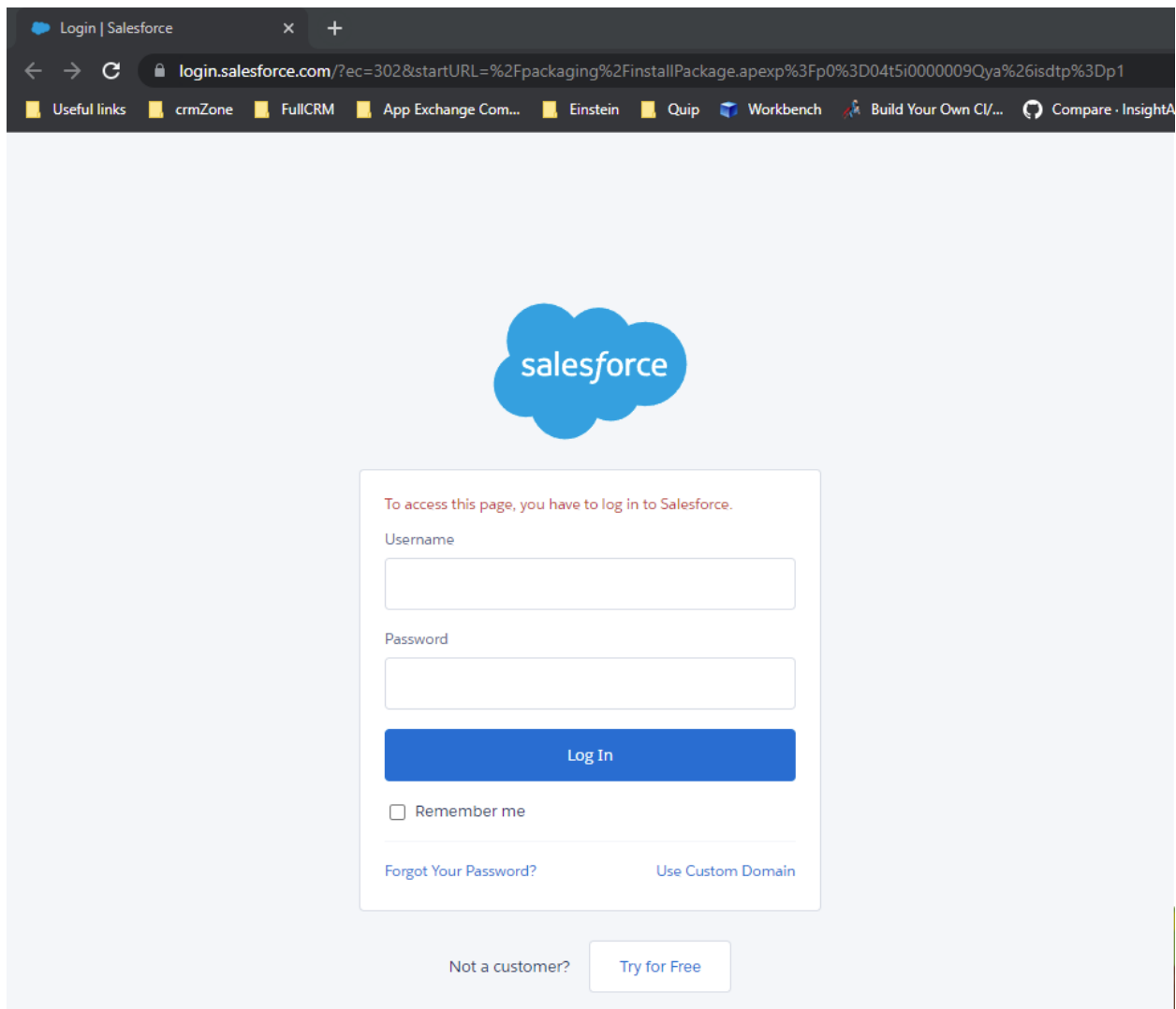
## Support

Please contact us at [hello@insightablapps.com](mailto:hello@insightablapps.com) for any support questions or issues.

## Installation Steps

On installation it will ask you to log into Salesforce with your Salesforce credentials.

*NB: If you are installing into a sandbox, replace the “login” part of the URL with “test” and then login with your sandbox credentials.*



The screenshot shows a web browser window with the title "Login | Salesforce". The address bar displays the URL: `login.salesforce.com/?ec=3028&startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t5i0000009Qya%26isdtp%3Dp1`. Below the address bar is a navigation bar with several links: "Useful links", "crmZone", "FullCRM", "App Exchange Com...", "Einstein", "Quip", "Workbench", "Build Your Own CL...", and "Compare · InsightA". The main content area features the Salesforce logo (a blue cloud with the word "salesforce" inside). Below the logo is a login form with the following elements: a message "To access this page, you have to log in to Salesforce.", a "Username" label and input field, a "Password" label and input field, a blue "Log In" button, a "Remember me" checkbox, a "Forgot Your Password?" link, a "Use Custom Domain" link, and at the bottom, a "Not a customer?" link and a "Try for Free" button.

Once logged in you will be presented with the following screen. Ensure:

1. Install for Admins Only (you will be applying permission sets in the next steps to provide access to other non-admins)

Finally, press the Install button. If there are any errors on installation please get in contact and provide any error information.

## Post Installation Steps

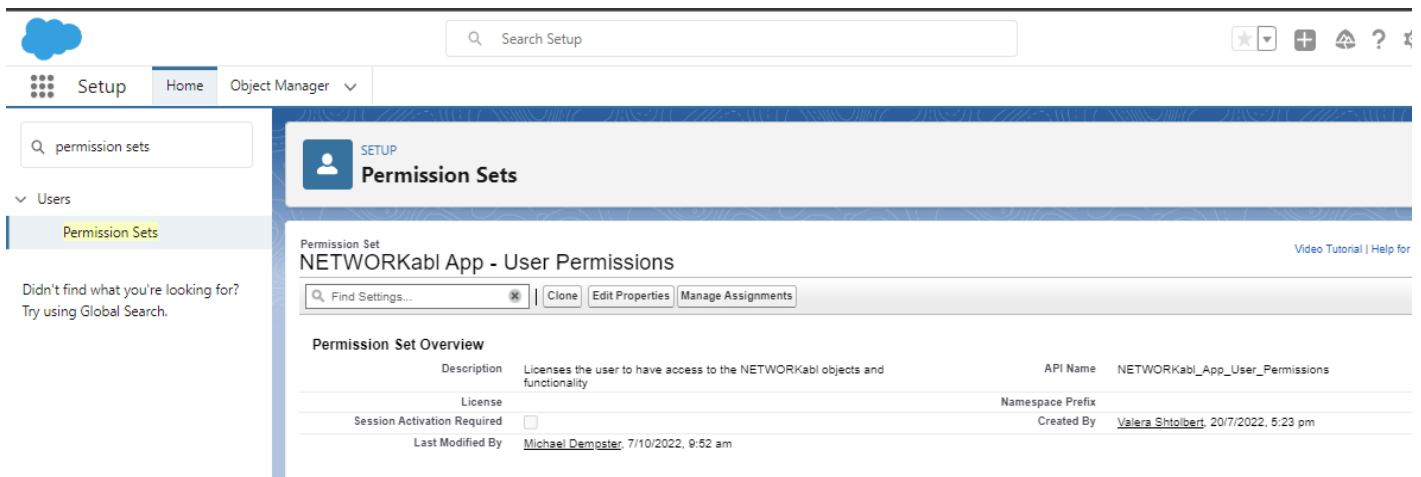
### Assign Permission Sets

Permission sets have been created to license a Salesforce user with the Networkabl application providing access to the objects, fields, components and automation. There are two permission sets:

1. NETWORKKabl App - User Permission
  - This permission is to be assigned to any user who is to be licensed with accessing the Networkabl application
  - The permission provides object and field level access to the Networkabl data model.
2. NETWORKKabl App - Admin Permission
  - This permission provides the same access as the User Permission above as well as access to the Networkabl configuration page used to setup the application
  - *NB: Only users with setup access will be able to use this permission set*

To assign a permission set:

1. Setup > Permission Sets
2. Select the Permission Set and press "Manage Assignments"



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'permission sets' entered and a list of 'Users' and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the details for 'NETWORKKabl App - User Permissions'. The details include a description, API Name, Namespace Prefix, License, Session Activation Required, and Last Modified By.

| Permission Set Overview     |                                                                               |
|-----------------------------|-------------------------------------------------------------------------------|
| Description                 | Licenses the user to have access to the NETWORKKabl objects and functionality |
| API Name                    | NETWORKKabl_App_User_Permissions                                              |
| License                     |                                                                               |
| Session Activation Required | <input type="checkbox"/>                                                      |
| Namespace Prefix            |                                                                               |
| Created By                  | Valera Shtolbert, 20/7/2022, 5:23 pm                                          |
| Last Modified By            | Michael Demoster, 7/10/2022, 9:52 am                                          |

3. Select the users who will be provided access to the application and assign

Assign Users

## All Users

View: All Users [Edit](#) | [Create New View](#)

| <input type="checkbox"/> Action                            | Full Name ↑                       | Alias                   | Role                                                           |
|------------------------------------------------------------|-----------------------------------|-------------------------|----------------------------------------------------------------|
| <input type="checkbox"/>   <a href="#">Edit</a>            | <a href="#">Chatter Expert</a>    | <a href="#">Chatter</a> |                                                                |
| <input type="checkbox"/>   <a href="#">Edit</a>            | <a href="#">Dempster, Michael</a> | <a href="#">MDemp</a>   | <a href="#">CEO</a>                                            |
| <input checked="" type="checkbox"/>   <a href="#">Edit</a> | <a href="#">Rogers, comm</a>      | <a href="#">jroge</a>   |                                                                |
| <input checked="" type="checkbox"/>   <a href="#">Edit</a> | <a href="#">Rogers, Jack</a>      | <a href="#">jroge</a>   | <a href="#">Burlington Textiles Corp of America Partner Us</a> |
| <input type="checkbox"/>   <a href="#">Edit</a>            | <a href="#">SVP</a>               | <a href="#">sale</a>    | <a href="#">SVP, Sales &amp; Marketing</a>                     |
| <input type="checkbox"/>   <a href="#">Edit</a>            | <a href="#">User, Integration</a> | <a href="#">integ</a>   |                                                                |
| <input type="checkbox"/>   <a href="#">Edit</a>            | <a href="#">User, Security</a>    | <a href="#">sec</a>     |                                                                |

[Assign](#) [Cancel](#)

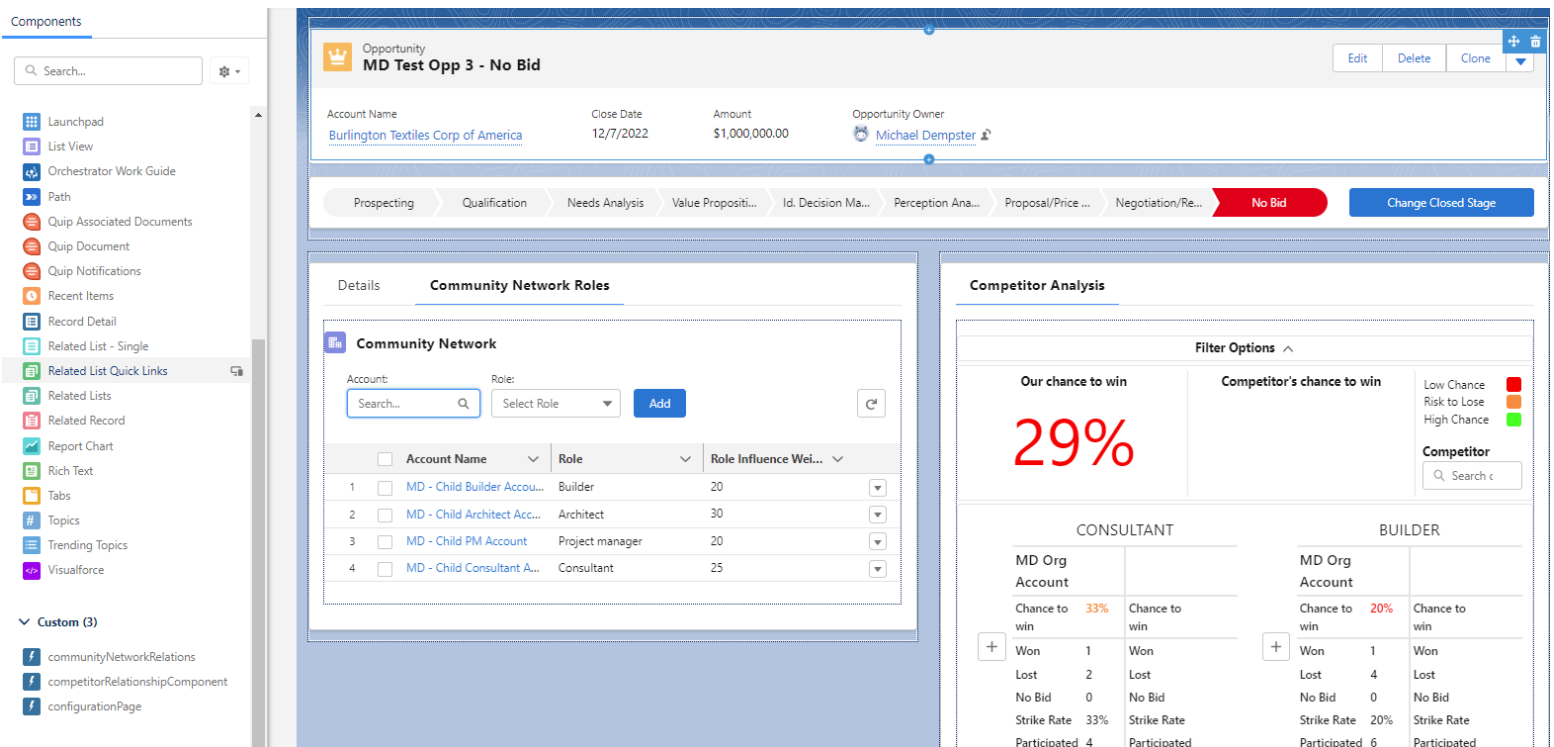
## Lightning Page Adjustments

NETWORKabl provides two lightning components that need to be added to your existing Opportunity lightning page. These components provide the ability to:

1. Add roles to the community network of an opportunity (communityNetworkRelations)
2. Simulate win percentage change against a competitor (competitorRelationshipComponent)

## Opportunity Object

1. Navigate to Setup > Object Manager > Opportunity > Lightning Record Pages > Edit
2. Create new tabs to place the new components



**Components**

Search...

- Launchpad
- List View
- Orchestrator Work Guide
- Path
- Quip Associated Documents
- Quip Document
- Quip Notifications
- Recent Items
- Record Detail
- Related List - Single
- Related List Quick Links
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Tags
- Topics
- Trending Topics
- Visualforce
- Custom (3)
  - communityNetworkRelations
  - competitorRelationshipComponent
  - configurationPage

**Opportunity**  
**MD Test Opp 3 - No Bid**

Account Name: Burlington Textiles Corp of America | Close Date: 12/7/2022 | Amount: \$1,000,000.00 | Opportunity Owner: Michael Dempster

Prospecting > Qualification > Needs Analysis > Value Proposit... > Id. Decision Ma... > Perception Ana... > Proposal/Price ... > Negotiation/Re... > **No Bid** > Change Closed Stage

**Details** **Community Network Roles**

**Community Network**

Account: Search... | Role: Select Role | Add

|   | Account Name                | Role            | Role Influence Wei... |
|---|-----------------------------|-----------------|-----------------------|
| 1 | MD - Child Builder Accou... | Builder         | 20                    |
| 2 | MD - Child Architect Acc... | Architect       | 30                    |
| 3 | MD - Child PM Account       | Project manager | 20                    |
| 4 | MD - Child Consultant A...  | Consultant      | 25                    |

**Competitor Analysis**

Filter Options ^

**Our chance to win**  
**29%**

**Competitor's chance to win**

Low Chance  
Risk to Lose  
High Chance

Competitor  
Search...

| CONSULTANT     |               | BUILDER        |               |
|----------------|---------------|----------------|---------------|
| MD Org Account | Chance to win | MD Org Account | Chance to win |
| Chance to win  | 33%           | Chance to win  | 20%           |
| Won            | 1             | Won            | 1             |
| Lost           | 2             | Lost           | 4             |
| No Bid         | 0             | No Bid         | 0             |
| Strike Rate    | 33%           | Strike Rate    | 20%           |
| Participated   | 4             | Participated   | 6             |

3. Click & Drag the components onto the page

## Page Layout Adjustments

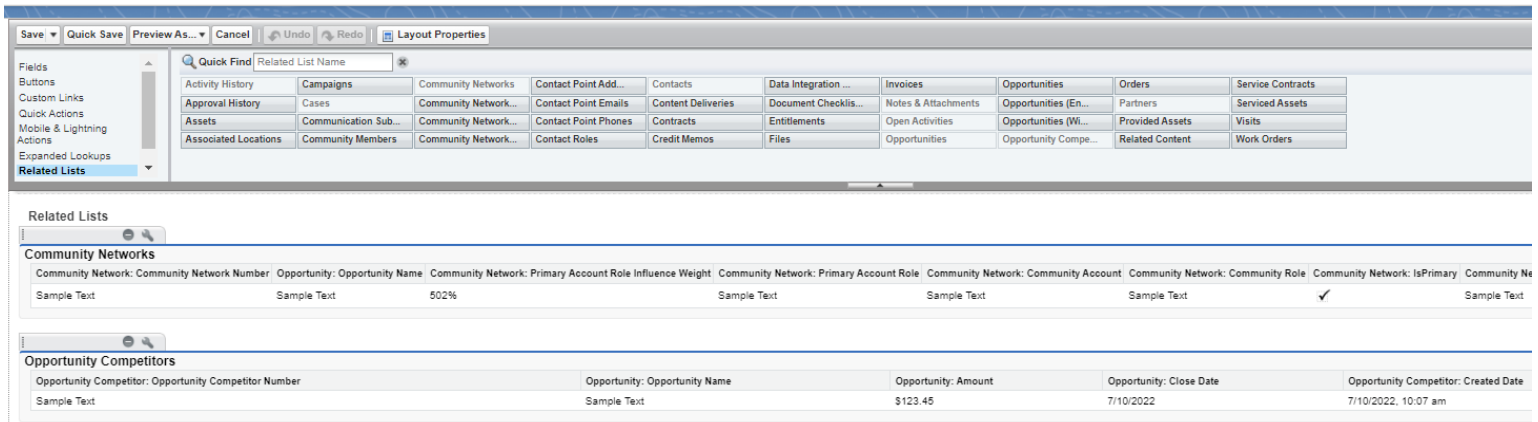
### Account / Opportunity Related Lists

There are two related lists linked to Account and Opportunity that are required to be added to the page for visibility of related:

- Community Network
- Opportunity Competitor

Navigate to your org's Account and Opportunity Contact page layout and include the following related lists:

- Account
  - Community Networks
  - Opportunity Competitor *(NB: You may only want to include this on your competitor page)*
- Contact
  - Community Network
  - Opportunity Competitor



The screenshot shows the Salesforce Page Layout Editor interface. At the top, there's a toolbar with buttons like Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Quick Find' search bar and a grid of available related lists. The 'Related Lists' section on the left is expanded, showing a list of available related lists. The main area displays two related lists: 'Community Networks' and 'Opportunity Competitors'.

**Community Networks**

| Community Network: Community Network Number | Opportunity: Opportunity Name | Community Network: Primary Account Role Influence Weight | Community Network: Primary Account Role | Community Network: Community Account | Community Network: Community Role | Community Network: IsPrimary | Community Network: Created Date |
|---------------------------------------------|-------------------------------|----------------------------------------------------------|-----------------------------------------|--------------------------------------|-----------------------------------|------------------------------|---------------------------------|
| Sample Text                                 | Sample Text                   | 502%                                                     | Sample Text                             | Sample Text                          | Sample Text                       | ✓                            | Sample Text                     |

**Opportunity Competitors**

| Opportunity Competitor: Opportunity Competitor Number | Opportunity: Opportunity Name | Opportunity: Amount | Opportunity: Close Date | Opportunity Competitor: Created Date |
|-------------------------------------------------------|-------------------------------|---------------------|-------------------------|--------------------------------------|
| Sample Text                                           | Sample Text                   | \$123.45            | 7/10/2022               | 7/10/2022, 10:07 am                  |

Ensure the following:

1. New and Change Owner buttons are removed from the related list using the “spanner” icon
2. The correct fields are displaying as per your requirements

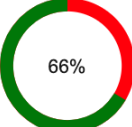
## Networkabl Configuration

The configuration page is created to enable the setup user (administrator) to easily configure the application, defining the mandatory settings and adding default values. The configuration page will be broken into separate tabs on the navigation bar providing a tab per object with links to settings, objects, fields and layouts and a main tab for general settings of the package.

The configuration is crucial to the functionality of the application. A visual indicator showcases the progress of the mandatory settings configuration completeness.

 NETWORKabl App

Accounts ▾ Opportunities ▾ Reports ▾ Dashboards ▾ NETWORKabl Configuration Page

  
66%

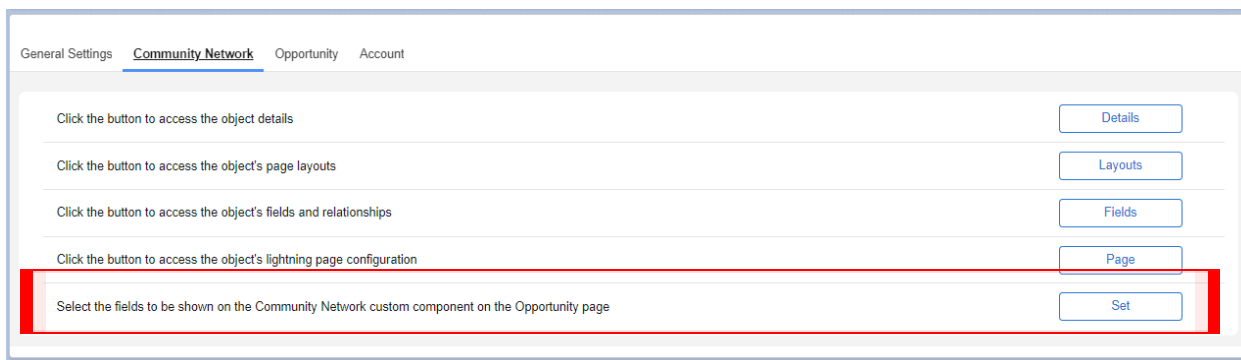
The status shows the completion percentage of the required configurations below  
Settings with \* mark are required to configure.

|                                                                                    |                                                                                                                                                                                                 |                           |
|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
|   | <b>*Community Network Roles</b><br>Specify the roles that make up the network of businesses that influence an Opportunity.                                                                      | <a href="#">Set</a>       |
|  | <b>*Community Network Role Influence Weight</b><br>Set the default influence weight percentages for each role in the community network. The combined percentage of all roles cannot exceed 100% | <a href="#">Set</a>       |
|  | <b>*Salesforce Organization Company Definition</b><br>Set the parameter to the record ID of the Account that represents your company.                                                           | <a href="#">Set</a>       |
|                                                                                    | <b>No Bid Opportunity</b><br>Define if Opportunities with a stage of "No Bid" are counted towards strike rate calculation                                                                       | <a href="#">Configure</a> |
|                                                                                    | <b>Colour Definitions</b><br>Define three colours displayed with strike rate percentage based on defined thresholds.                                                                            | <a href="#">Configure</a> |
|                                                                                    | <b>Colour Thresholds</b><br>Set Colour Thresholds for strike rate percentage against Competitor and Community Network roles.                                                                    | <a href="#">Configure</a> |

## General Settings:

- **Community Network Roles**
  - Specify the roles that make up the network of businesses that influence an Opportunity
- **Community Network Role Influence Weight**
  - Set the default influence weight percentages for each role in the community network. The combined percentage of all roles cannot exceed 100%
- **Salesforce Organization Company Definition**
  - Set this parameter to the Salesforce ID of the Account that is used as the SF Org company
- **No Bid Opportunity**
  - Define if Opportunities with a stage of "No Bid" are counted towards strike rate calculation
- **Colour Definitions**
  - Define three colours displayed with percentage win chance based on defined thresholds
- **Colour Thresholds**
  - Set Colour Thresholds for chance to win percentage against Competitor and Community Network roles

## Object Specific Tabs:

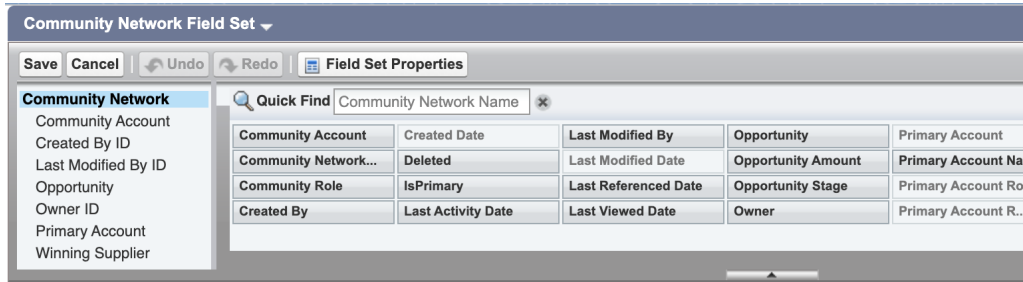


| General Settings                                                                                | <u>Community Network</u> | Opportunity | Account |
|-------------------------------------------------------------------------------------------------|--------------------------|-------------|---------|
| Click the button to access the object details                                                   |                          |             |         |
| Details                                                                                         |                          |             |         |
| Click the button to access the object's page layouts                                            |                          |             |         |
| Layouts                                                                                         |                          |             |         |
| Click the button to access the object's fields and relationships                                |                          |             |         |
| Fields                                                                                          |                          |             |         |
| Click the button to access the object's lightning page configuration                            |                          |             |         |
| Page                                                                                            |                          |             |         |
| Select the fields to be shown on the Community Network custom component on the Opportunity page |                          |             |         |
| Set                                                                                             |                          |             |         |

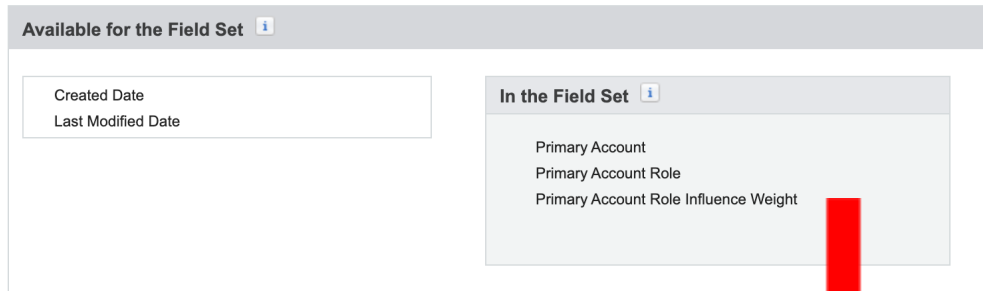
- Navigate through the following buttons to access each object:
  - Details - Quick access to Setup > Object Manager > "chosen object"
  - Layouts - Quick access to Setup > Object Manager > Page layouts to adjust field position or remove fields from the layout
  - Fields - Quick access to Setup > Object Manager > Fields & Relationships for that specific object to make amendments
  - Page - Quick access to Setup > Object Manager > Lightning Record Page to adjust components on the lightning page
  - Set - If available, allows for updating of field sets relevant to that object that are used to display in custom components. See below for more details

## Community Network Role Field Set

This field set customizes the fields displayed in the communityNetworkRelations lightning component displayed on the Opportunity to allow the user to select which account and role to add to the community network.



Drag any of the fields above into one of the lists below.



### Community Network

Account:   Role:

|   | <input type="checkbox"/> Account Name    | <input type="checkbox"/> Role | <input type="checkbox"/> Role Influence Weight |                                  |
|---|------------------------------------------|-------------------------------|------------------------------------------------|----------------------------------|
| 1 | <input type="checkbox"/> Architect       | Architect                     | 30                                             | <input type="button" value="v"/> |
| 2 | <input type="checkbox"/> Project Manager | Project manager               | 50                                             | <input type="button" value="v"/> |
| 3 | <input type="checkbox"/> Builder         | Builder                       | 20                                             | <input type="button" value="v"/> |