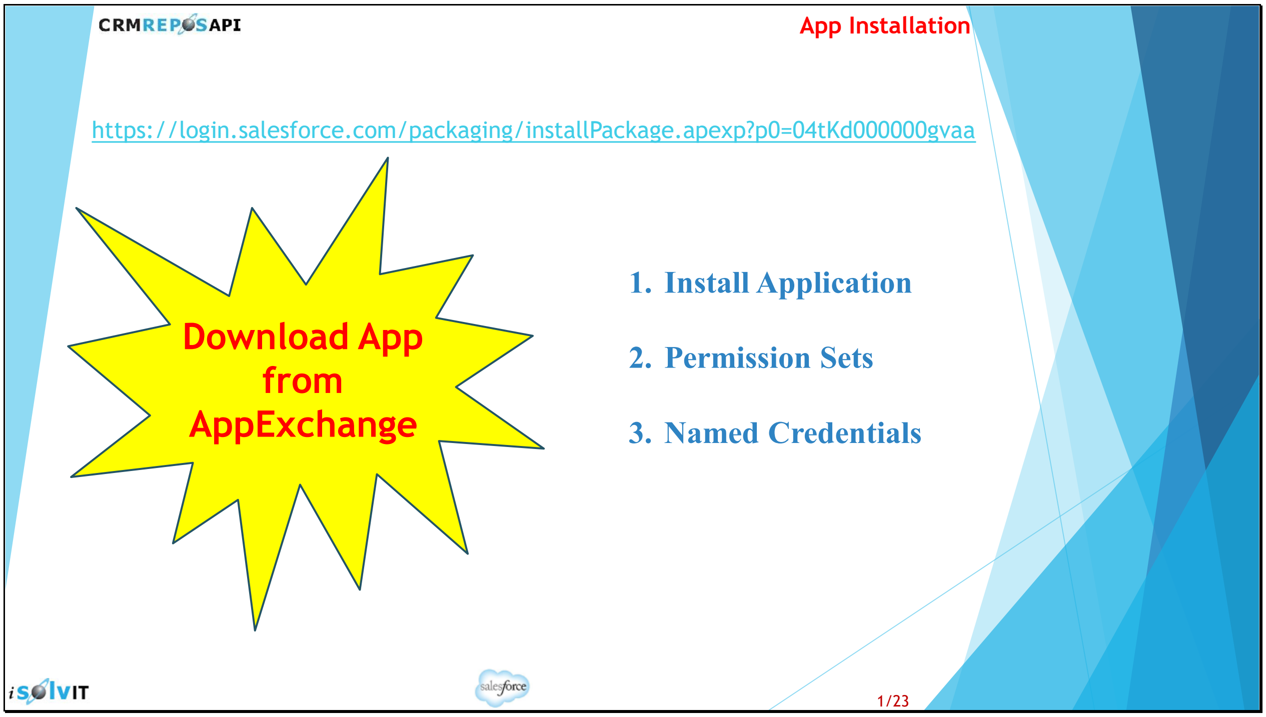

Image 1

Welcome to CRMReposAPI

Professional Reporting Made Simple

CRMReposAPI transforms Salesforce reports into fully formatted, personalized, and distributable Excel files—complete with standardized headers and footers, optional encryption, and automated Slice & Dice distribution. All of this is delivered without manual effort or custom Apex.

Installation

To install CRMReposAPI:

1. Download the application from **Salesforce AppExchange**, or
2. **CTRL + Click** the installation link below.

After installation, complete setup by:

- Assigning all required permission sets
- Configuring the necessary Named Credentials

Install CRMReposAPI

https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKd000000gvaa

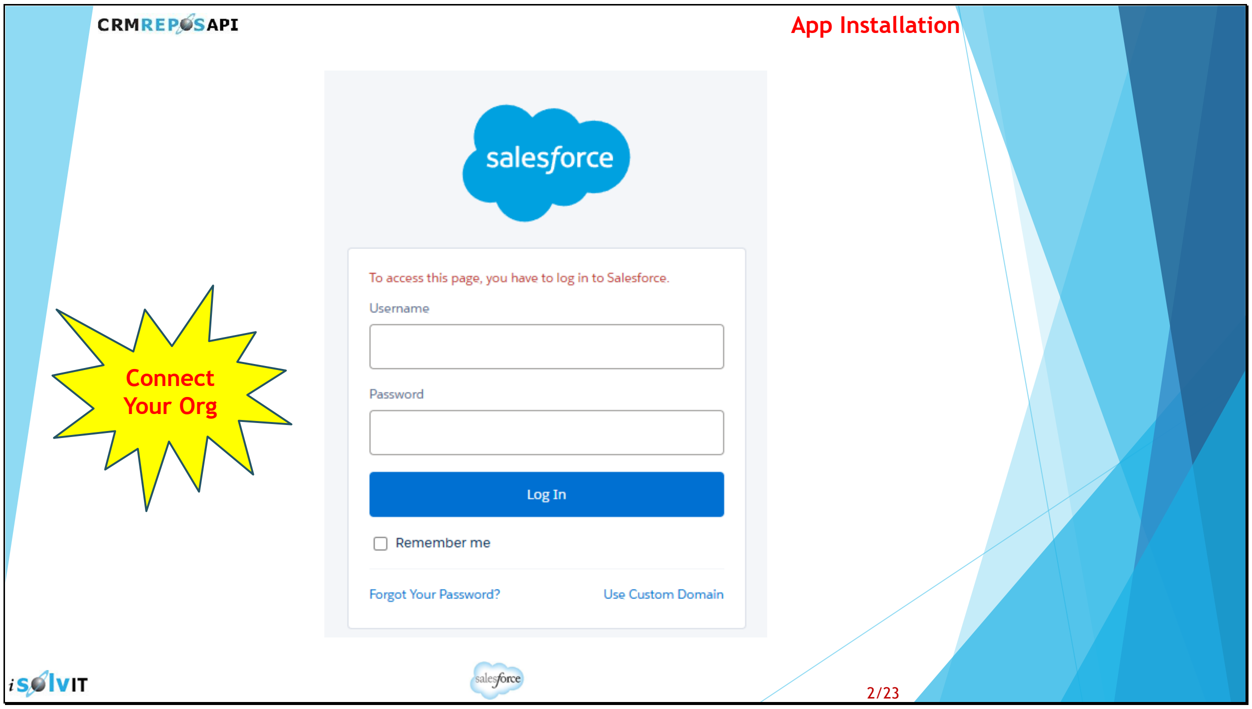

Image 2

First step in installation is to enter the Salesforce Org credentials where you want to install the CRMReposAPI app.

Installation

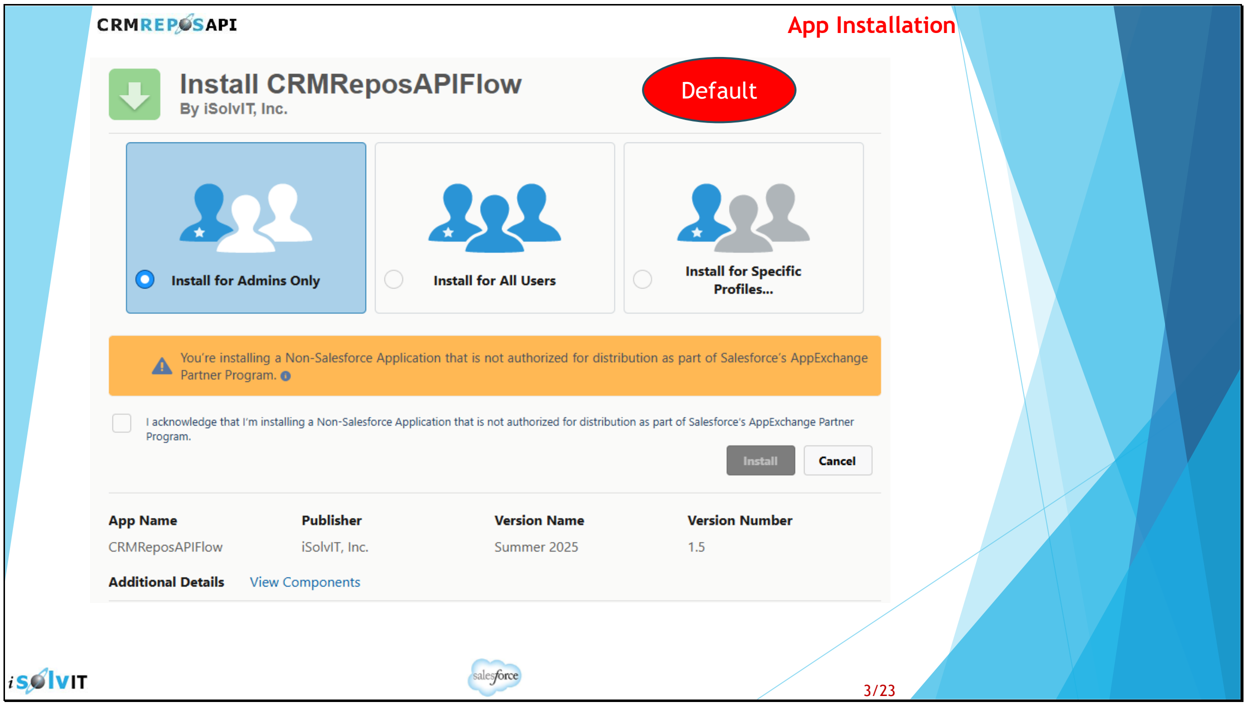

Image 3

2nd step is to select type of installation. Please select *'Install for All Users' and check the* acknowledge checkbox. Access to this app is fully controlled through Permission Sets.

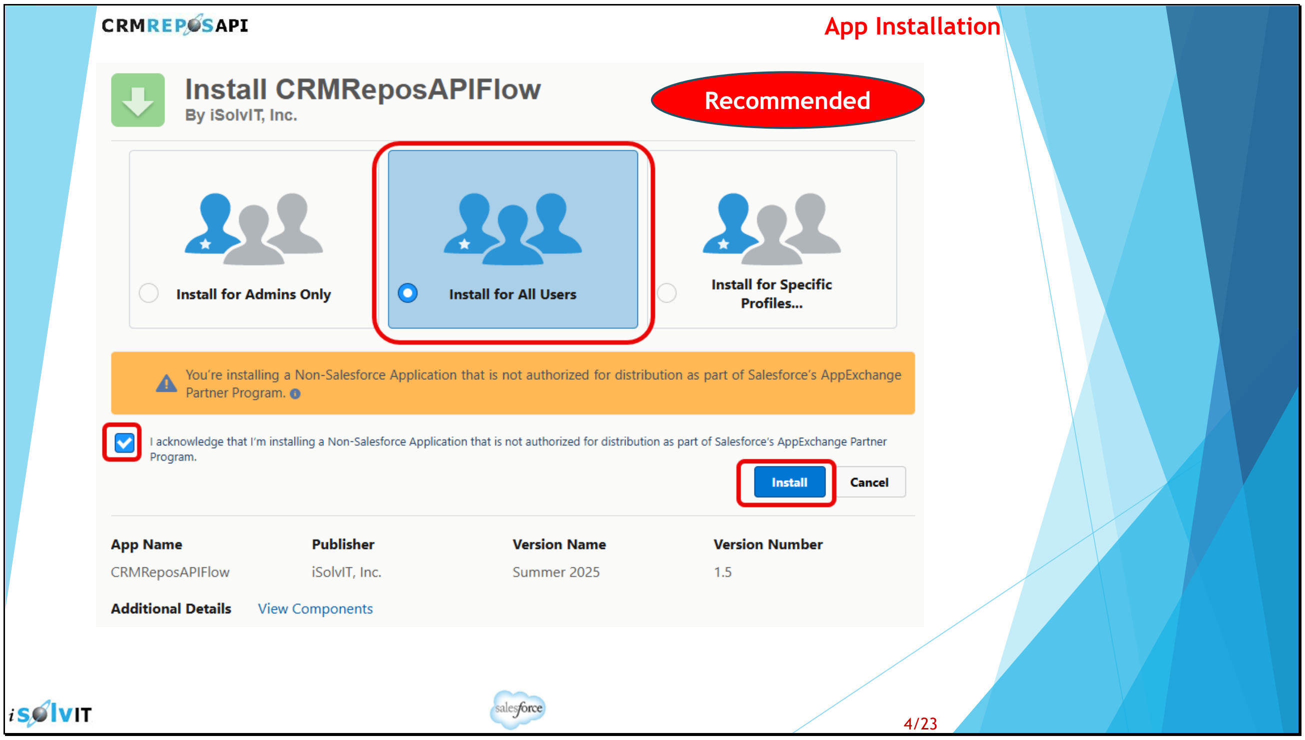

Image 4

Once selected, then click **Install** to begin the installation process.

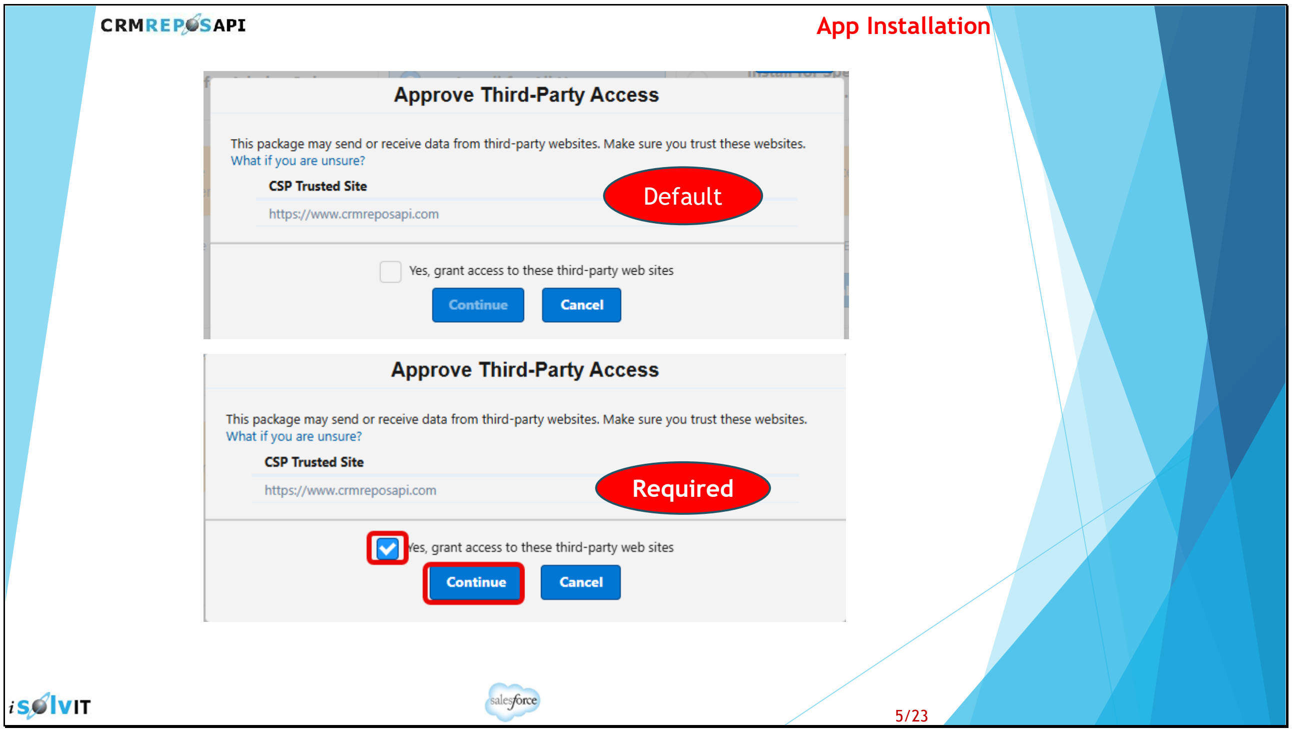

Image 5

3rd step: CRMReposAPI Flow requires access to an external API for report processing. During installation, approve access to https://www.crmreposapi.com so Salesforce can make the required API callouts.

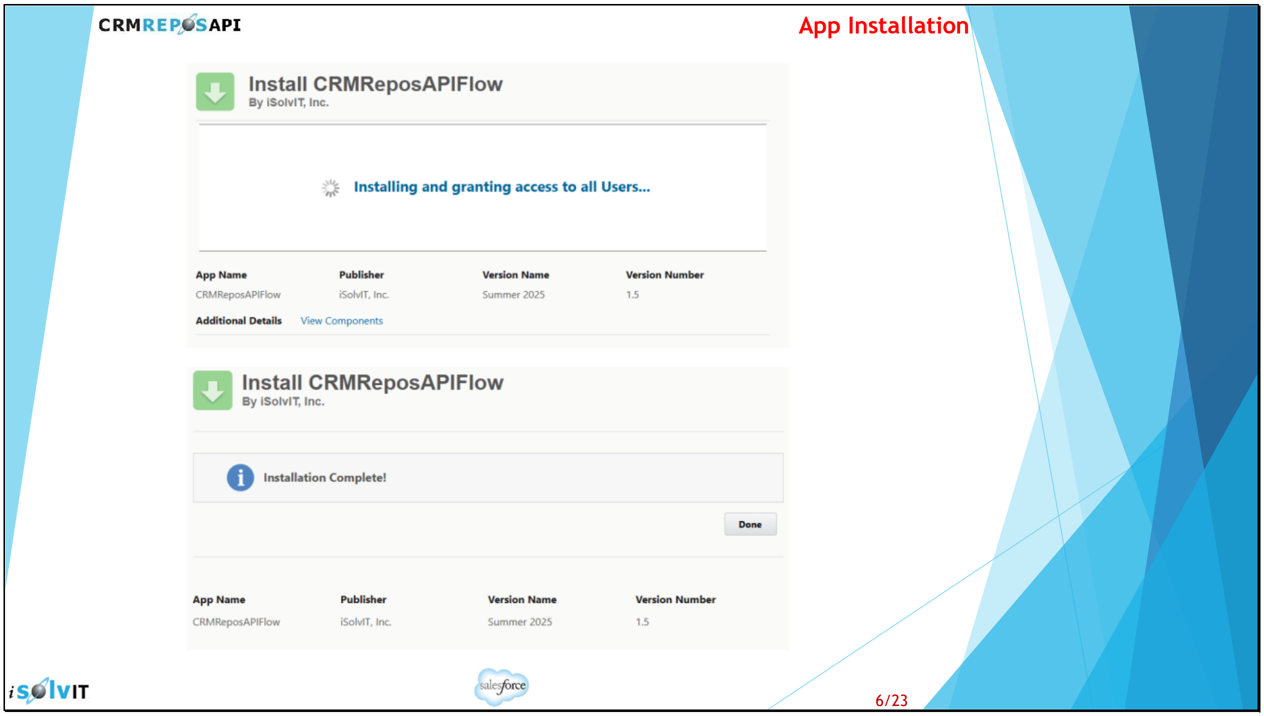

Image 6

Installation Status & Post-Install Setup

Once installation begins, Salesforce displays the status **“Installing and Granting Access to All Users…”**.

When the installation completes, the status updates to **“Installation Complete.”**

Click **Done** to return to your Salesforce org and complete the remaining manual setup steps.

Required Manual Setup

After installation, complete the following steps:

1. **Assign Permission Sets**
   Assign the included CRMReposAPI permission sets to all users who will run or upload reports.
2. **Configure Named Credentials**
   Enter the Named Credential **Username** and **Password** to enable authenticated API access.

These steps are required to ensure proper access control and secure communication with CRMReposAPI services.

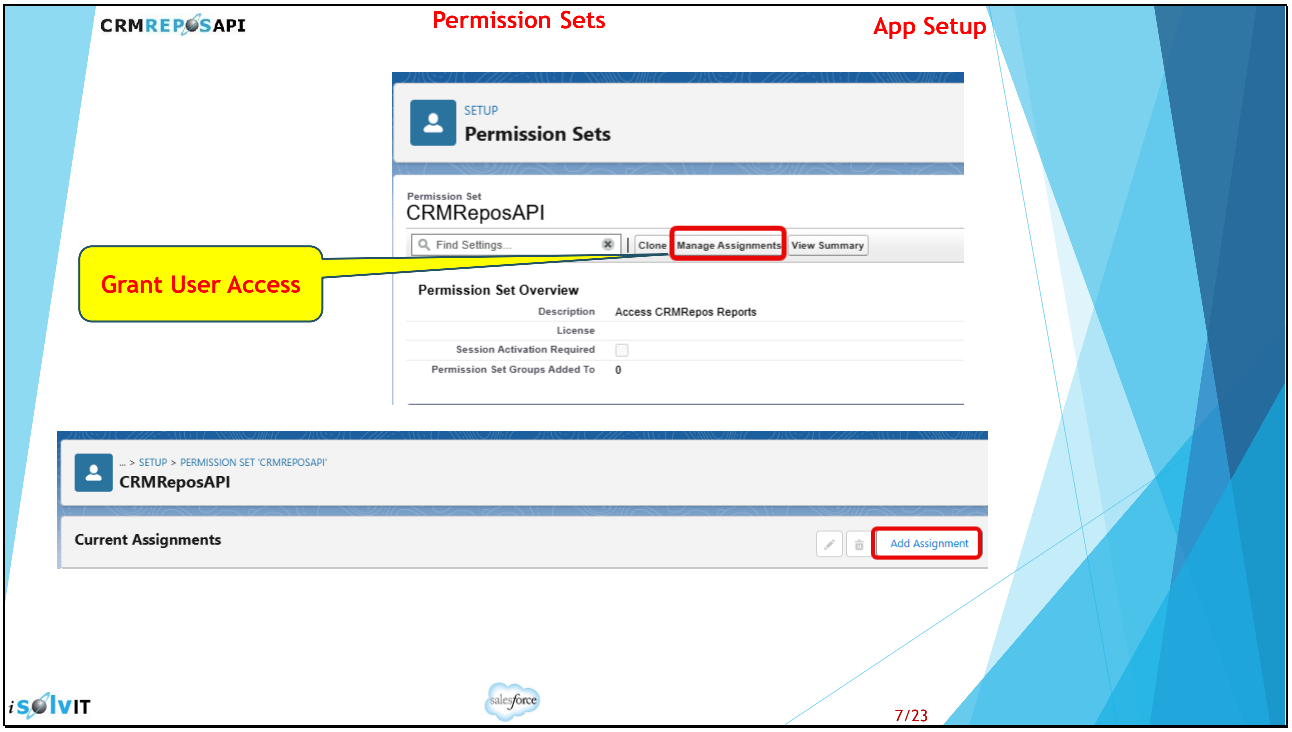

Image 7

Assigning Permission Sets

Permission sets grant users the required access to CRMReposAPI functionality. Assigning the appropriate permission sets ensures secure and uninterrupted operation of the application.

To assign the CRMReposAPI permission set:

1. In Salesforce, navigate to **Setup**
2. Select **Permission Sets**
3. Choose **CRMReposAPI**
4. Click **Manage Assignments**
5. Assign the permission set to the appropriate users

Only users who run or upload reports using CRMReposAPI need this permission set assigned.

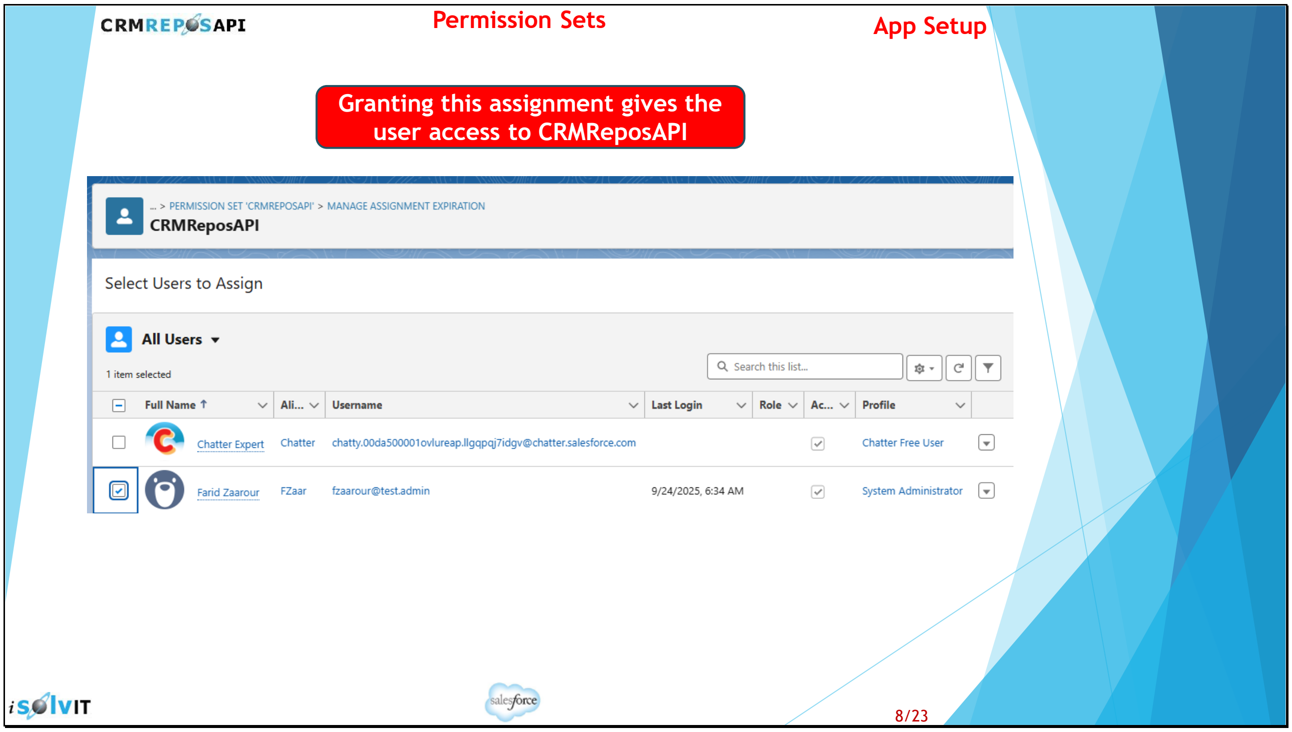

Image 8

Granting User Access

To grant access, assign the **CRMReposAPI** permission set to one or more users.

Repeat this step whenever a new user requires access to CRMReposAPI functionality.

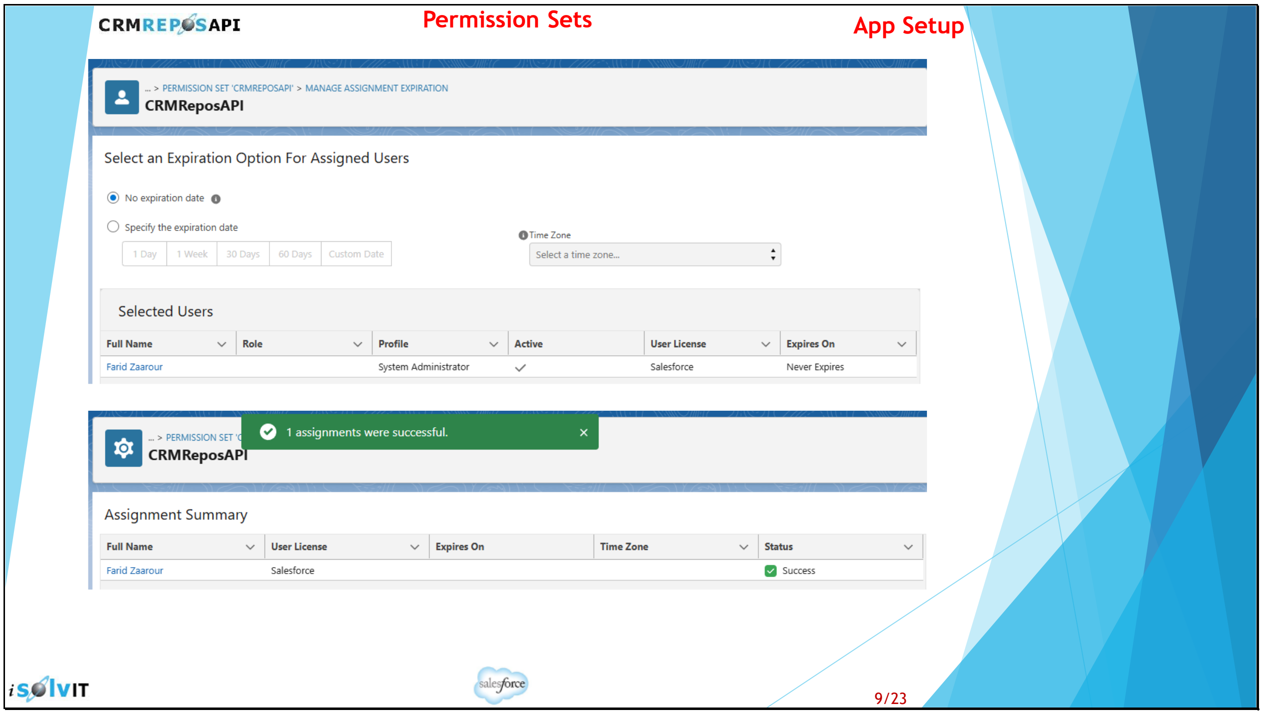

Image 9

Users assigned to the **CRMReposAPI permission set** are granted the required permissions to **run and upload reports** using CRMReposAPI.

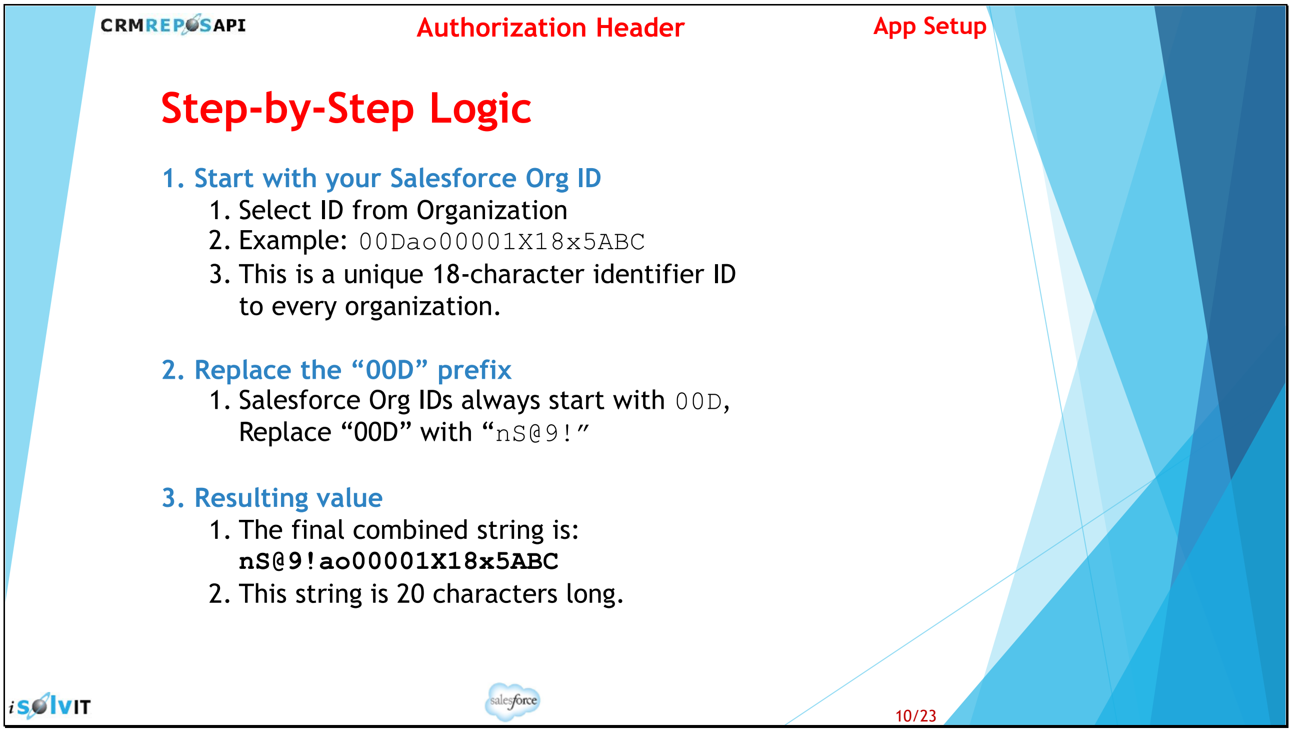

Image 10

Authorization Header Logic

This image illustrates the complete logic used to build the authorization header for your Salesforce organization.

To generate your **unique API token**, follow these steps:

1. Obtain your **18-character Salesforce Org ID** using SOQL (see the next screen).
2. Replace the first three characters (00D) of the Org ID with **nS@9!**.
3. Use the resulting value as your API token when constructing the authorization header.

This token uniquely identifies your Salesforce organization and is required for authenticated API access.

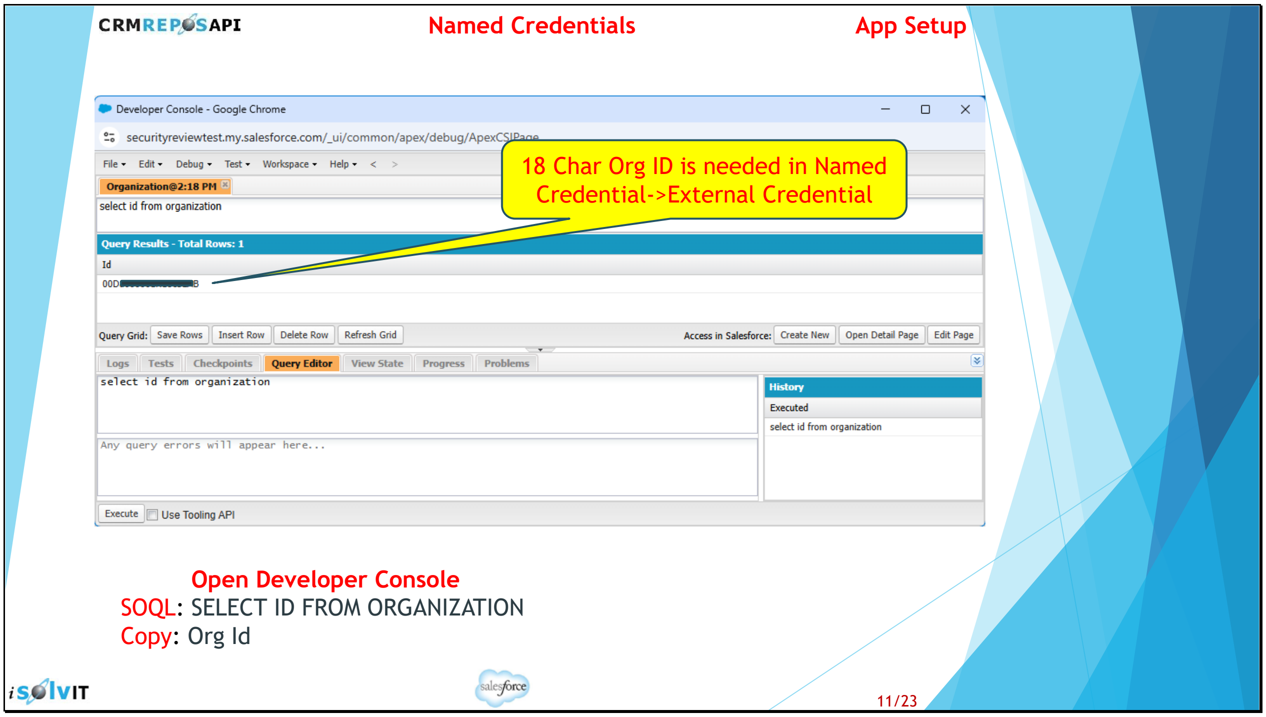

Image 11

Your Salesforce **Org ID** is required to generate the custom API token used in **Named Credentials**.

To obtain it:

1. Open the **Developer Console** in Salesforce.
2. Run the specified **SOQL query:** *SELECT ID FROM ORGANIZATION*.
3. Copy the resulting **18-character Org ID** from the query results.

Use this Org ID when constructing the custom API token for your Named Credential configuration.

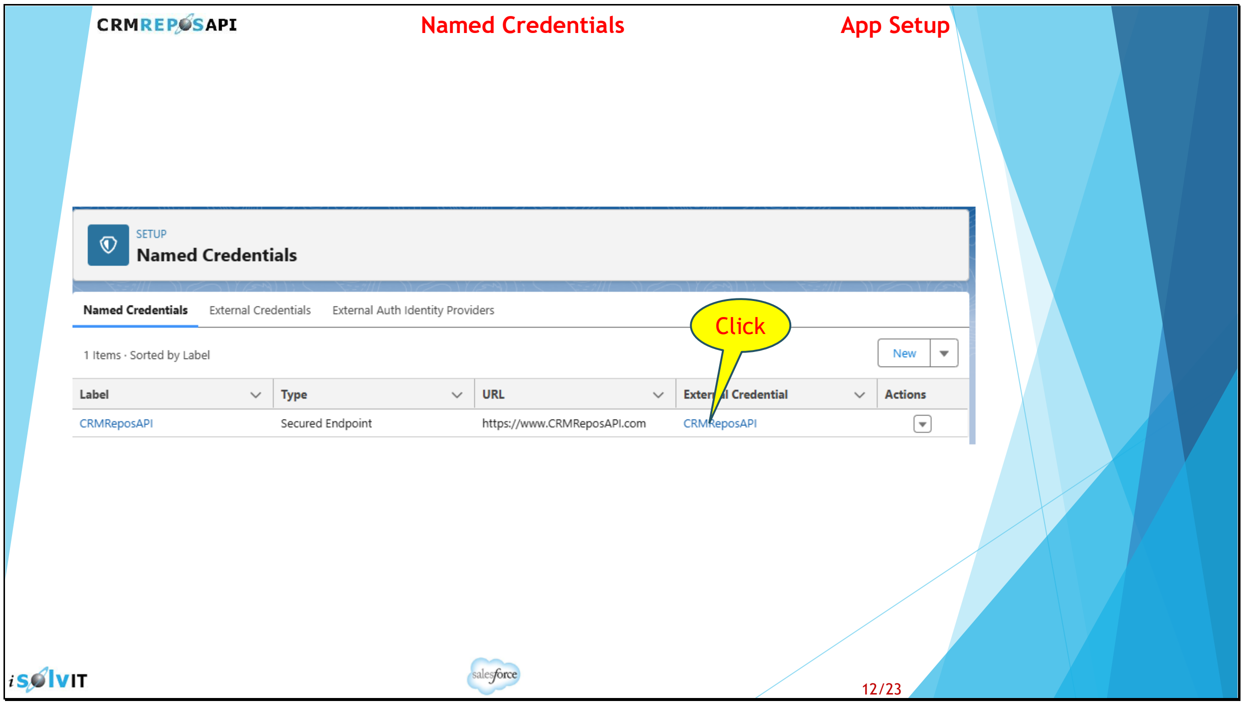

Image 12

In **Salesforce Setup**, navigate to **Named Credentials**. This is where you configure the authentication method used by **CRMReposAPI**.

On the **Named Credentials** page, locate **CRMReposAPI**, then click **CRMReposAPI** under **External Credentials** to continue.

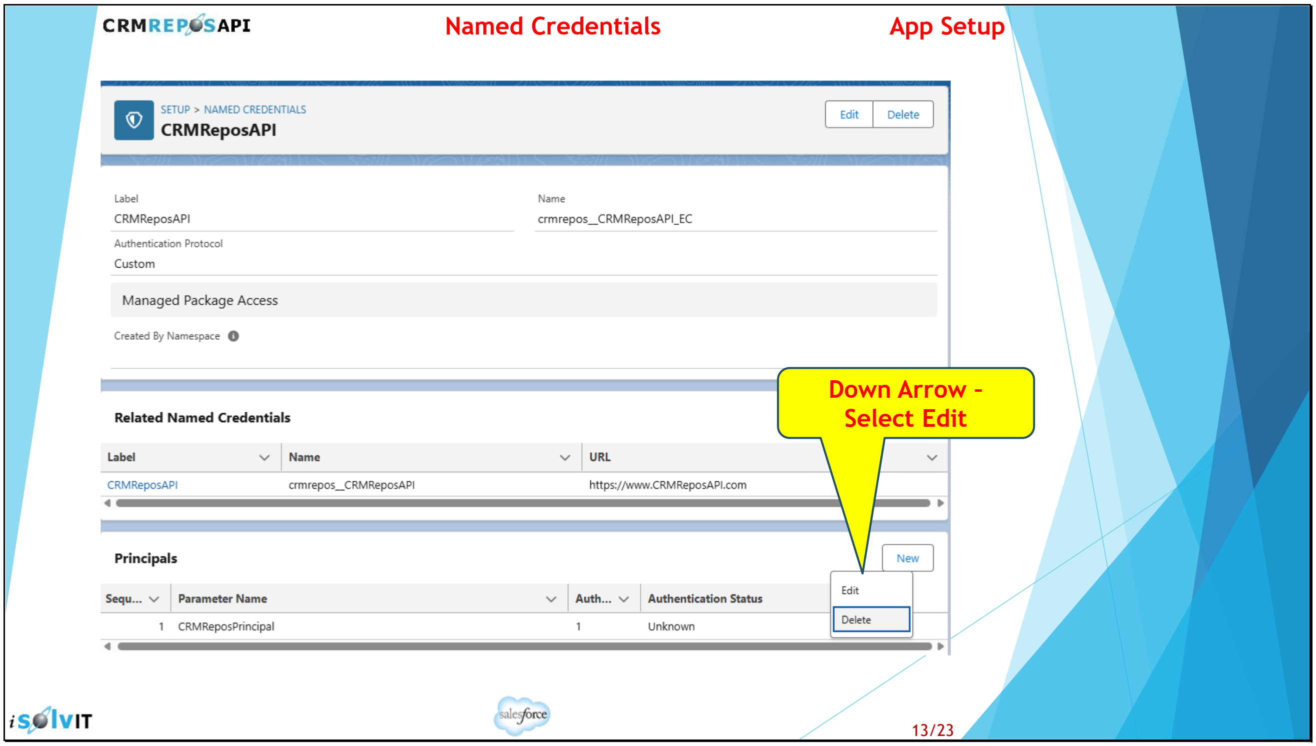

Image 13

On this screen, under **Principals**, locate **CRMReposPrincipal**.

Click the **down arrow** next to **Authentication Status**, then select **Edit**. This allows you to configure the API authentication parameters.

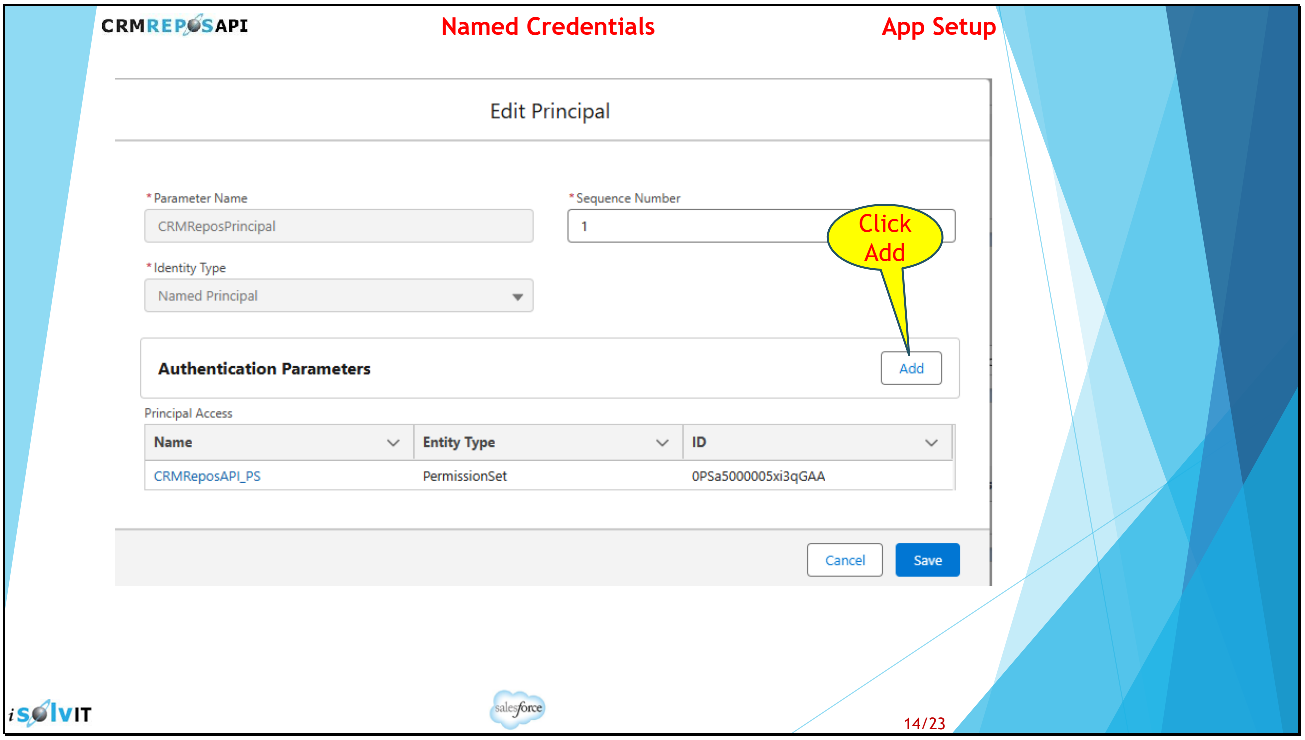

Image 14

Click **Add** to create a new authentication parameter.

This parameter is used to store the **custom API token** generated from your **Salesforce Org ID**. The token uniquely identifies your Salesforce organization and enables CRMReposAPI to authenticate securely when making API requests.

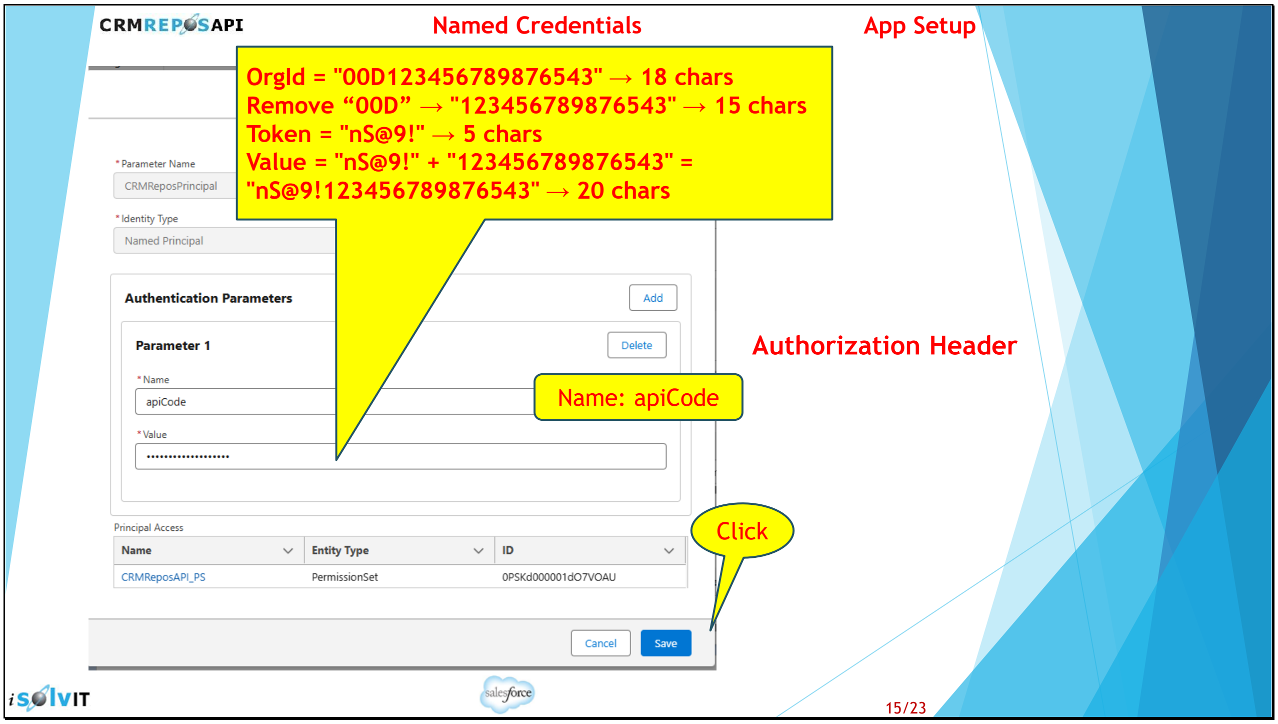

Image 15

Under **Authentication Parameter – Parameter 1**, complete the following fields:

In the **Name** field, enter **apiCode**.

In the **Value** field, paste the **newly generated API token** created from your Salesforce Org ID.

After verifying both entries, click **Save** to store the authentication parameter.

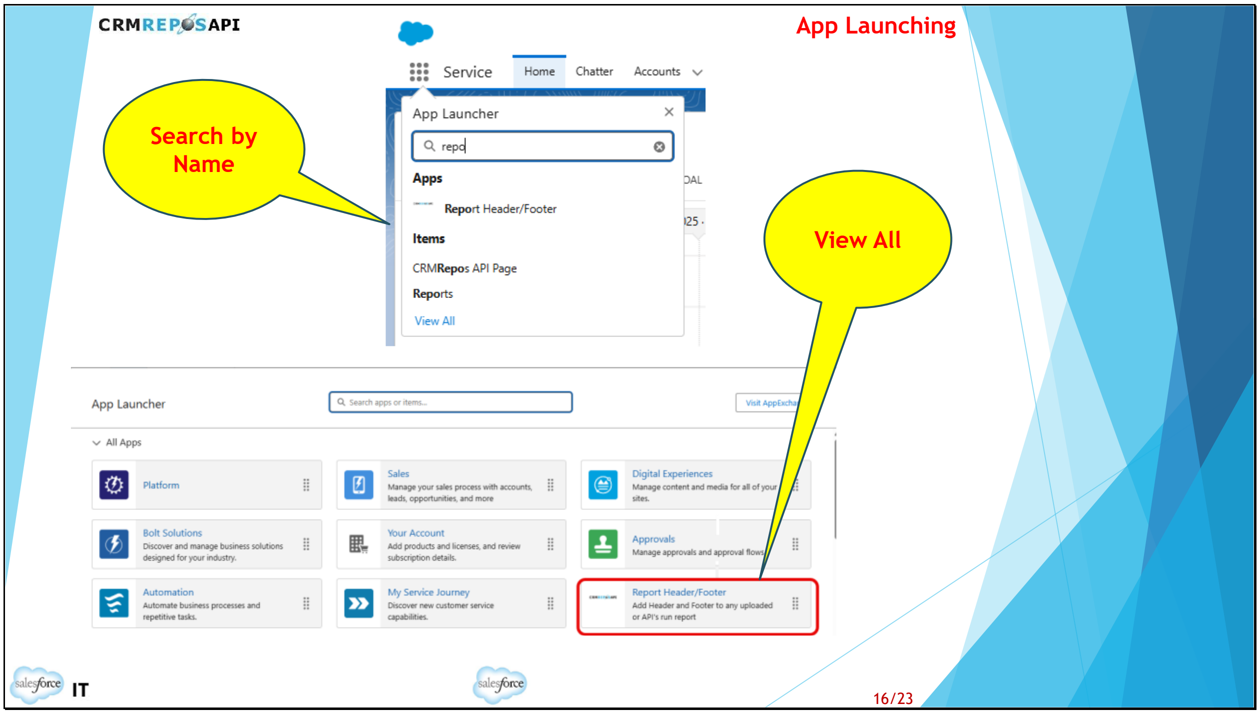

Image 16

Open the **Salesforce App Launcher**, search for **CRMReposAPI**, then select the app to launch it.

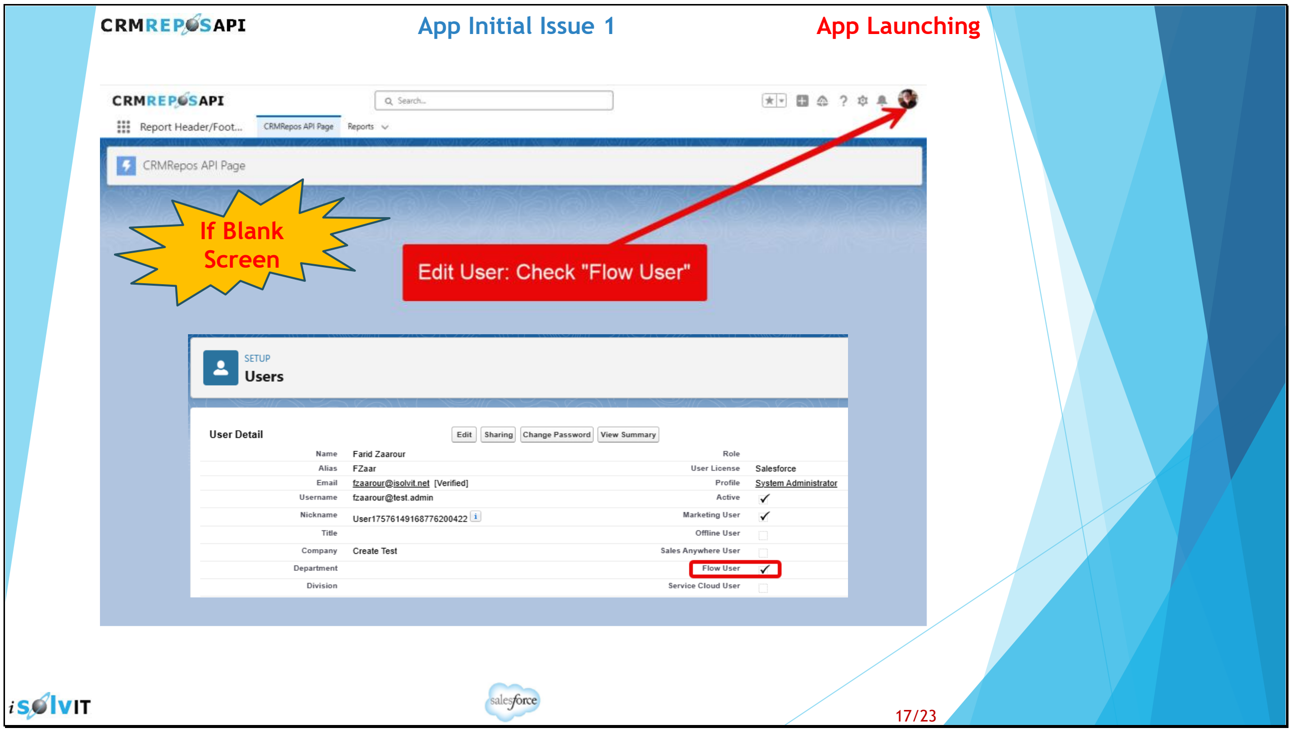

Image 17

When the app is launched, if a **blank screen** appears on the first launch, edit the **current user record**, enable the **Flow User** permission, and save the changes.

After saving return to **CRMReposAPI** to continue.

CRMREPOSAPI

Installation

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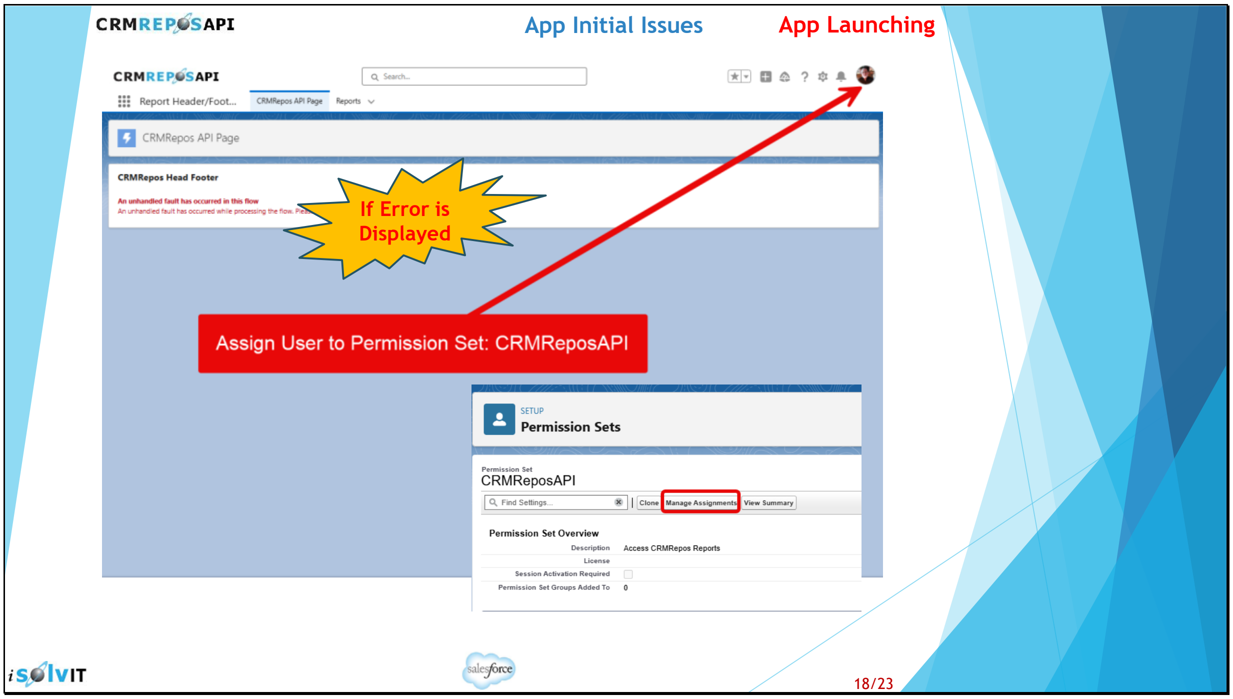

Image 18

After launching the app, if you see this error, verify that the **current user** has been assigned to the **CRMReposAPI permission set**.

If the user is not assigned, add the user to the **CRMReposAPI** permission set, then relaunch the app.

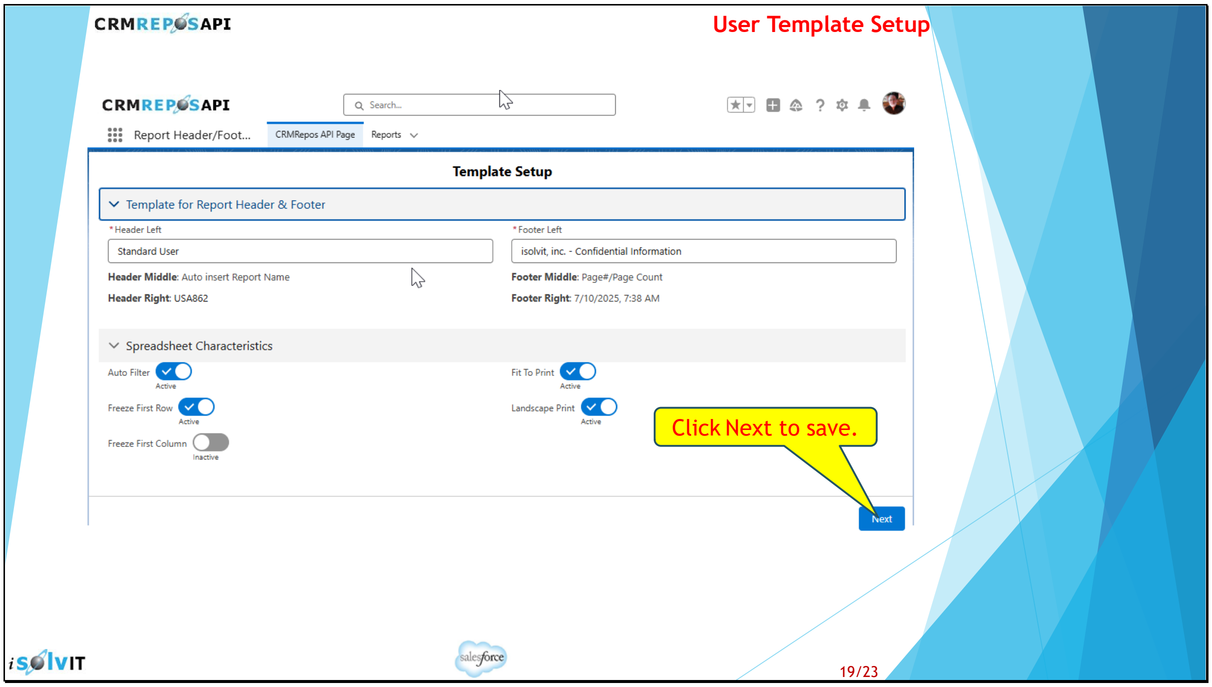

Image 19

Welcome — First-Time Sign-In

This is the first time you are opening the **CRMReposAPI** app using your unique user account and Salesforce organization.

Clicking **Next** will automatically create a new **Report Main Template** in CRMReposAPI. Once the template is created, you will have the opportunity to review and edit it before using it to process reports.

If you do not wish to proceed at this time, you may simply close this page or exit your browser window without making any changes.

In **Template Setup**, only a limited set of header and footer fields are configurable. The **Left Header** defaults to the current **user name**, and the **Left Footer** defaults to the **company name** followed by the label **“Confidential Information.”**

When a new report is selected, these values are automatically applied as the default for all reports. Choose these settings carefully, as they are applied globally and **cannot be changed at the individual report level**.

Other spreadsheet formatting options, such as layout and presentation, may be overridden later during individual report setup.

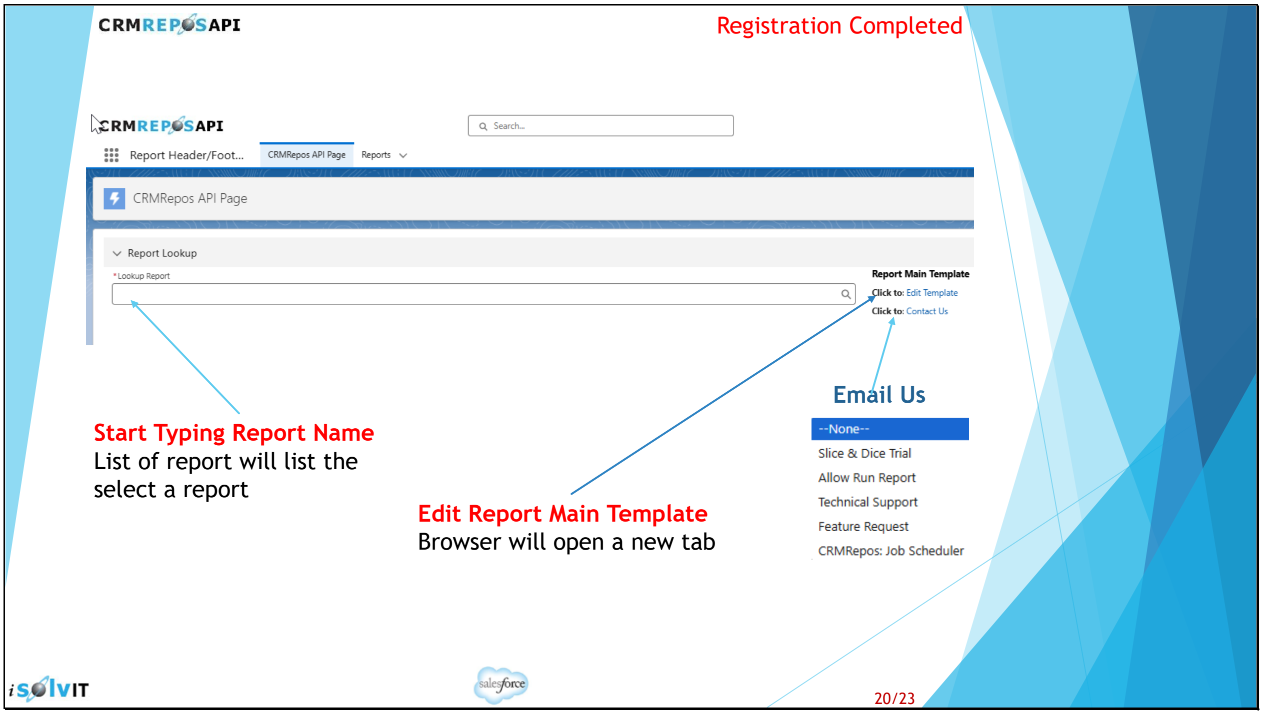

Image 20

This screen is the **CRMReposAPI App Main Page**. Each time you access the CRMReposAPI application, this page serves as the **starting point and primary entry screen** for all report configuration and report processing activities.

On the right side of the screen, the **Report Main Template** section provides two quick-access links:

Click to Edit Template — Opens the **Main Template** in a new browser tab, allowing you to review and edit the global header, footer, and default report settings.

Click to Contact Us — Opens a new browser tab where you can submit questions, support requests, or feature inquiries related to **CRMReposAPI**.

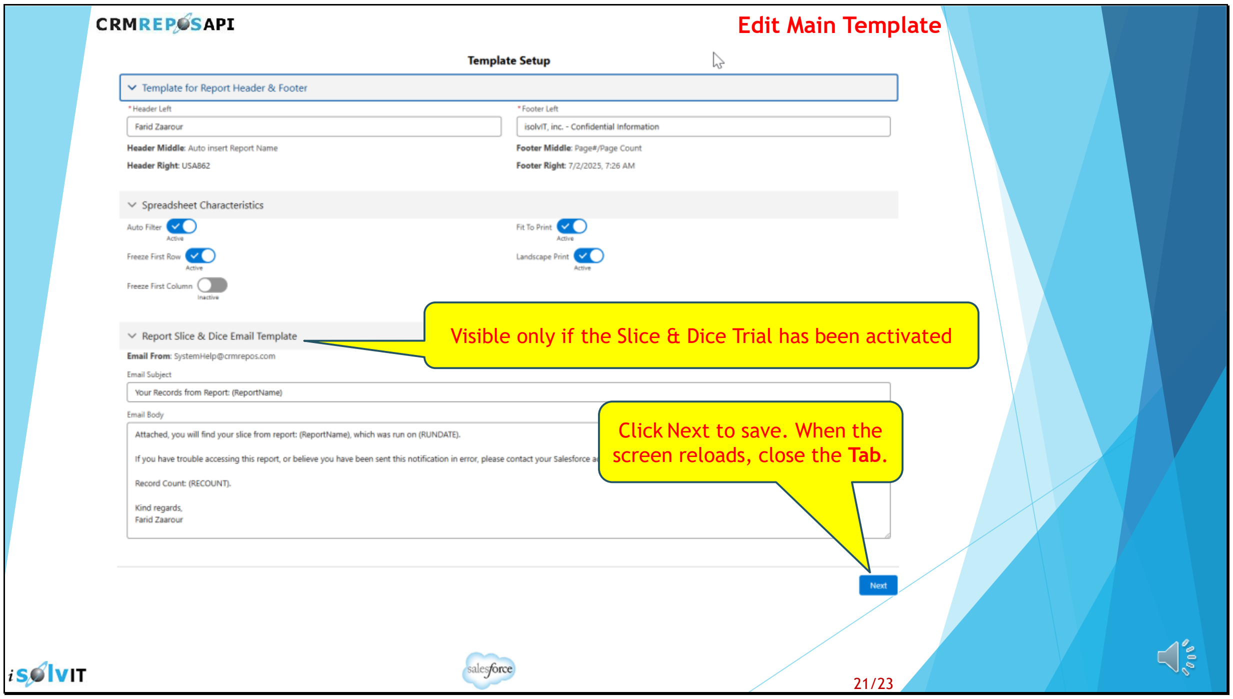

Image 21

When **Slice & Dice** is enabled, click **Click to Edit Template** to access additional configuration options. A new section becomes available that allows you to define the **email message** used to distribute personalized report files to recipients.

This section introduces two editable fields: **Email Subject** and **Email Body**.

The **Email Subject** supports one dynamic parameter:
Report Name: Automatically injected based on the newly selected report.

The **Email Body** supports three dynamic parameters:
Report Name: Automatically injected based on the newly selected report.
Record Count: The number of records included in the recipient's individual slice.
Run Date (UTC) The date and time the report was processed at runtime.

The **Record Count** and **Run Date (UTC)** parameters are injected dynamically when the report is executed, ensuring that each recipient receives accurate and contextual information.

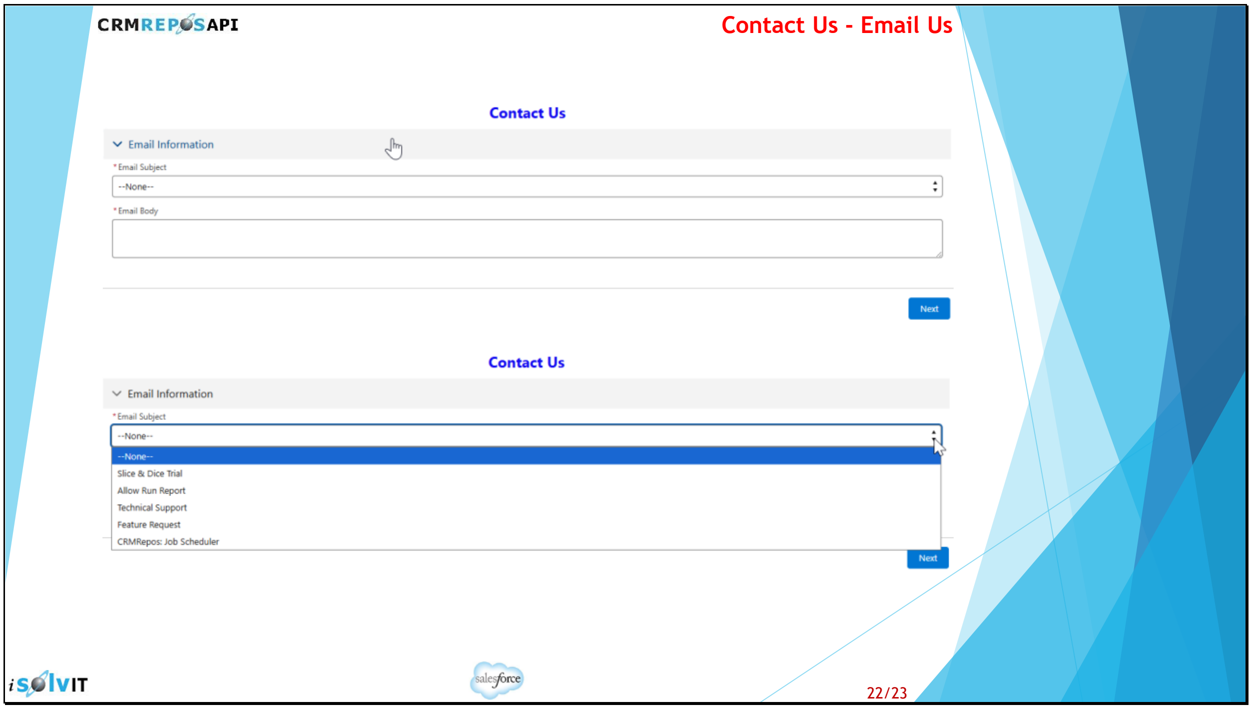

Image 22

Need Help or Support?

Use the **Contact Us** screen to reach our team. In the **Email Subject**, select the type of request. In the **Email Body**, describe your issue in detail and include your preferred method of contact for follow-up.

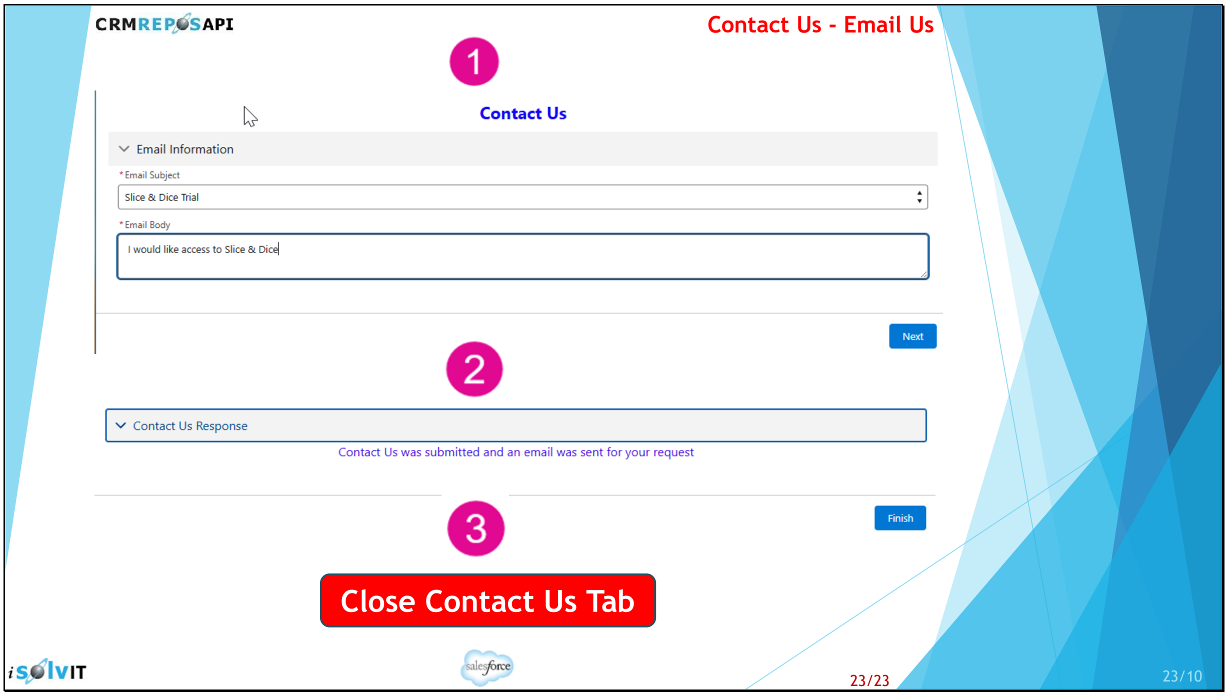

Image 23

After clicking **Next (Send)**, a confirmation message appears indicating that your email has been sent successfully. You may then close the **Contact Us** browser tab.