

DocFynd - Installation Guide

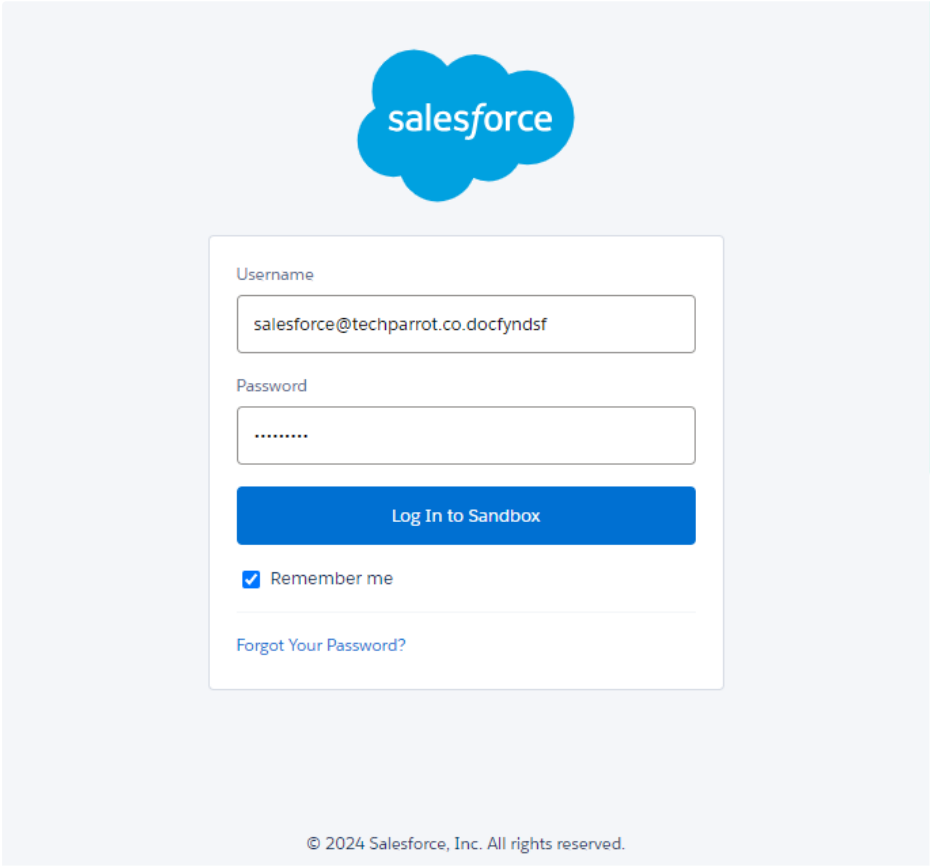
This guide describes how to install the DocFynd application in a Salesforce org.

i This guide is written for Salesforce Admins and assumes that the admin has all access rights to the Salesforce org where the app needs to be installed.

Steps to install the DocFynd app

Step 1: Click the following link <https://login.salesforce.com/package/installPackage.apexp?p0=04t4x000000UWNR>

Step 2: Login with the user credentials.

A screenshot of the Salesforce login page. At the top center is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white login form with a thin grey border. Inside the form, there are two input fields: the first is labeled "Username" and contains the text "salesforce@techparrot.co.docfyndsf"; the second is labeled "Password" and contains seven dots. Below these fields is a blue button with the text "Log In to Sandbox" in white. Under the button is a checkbox that is checked, with the text "Remember me" to its right. At the bottom of the form is a link that says "Forgot Your Password?". Below the entire login form, centered, is the copyright notice "© 2024 Salesforce, Inc. All rights reserved." The background of the page is a light grey-blue gradient, and there is a vertical teal bar on the right side.

Step 3: Click to install the DocFynd app



Install DocFynd

By



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. [?](#)

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name	Publisher	Version Name	Version Number
DocFynd		DocFynd	1.0

[Additional Details](#)
[View Components](#)

Step 4: Users can choose to install this application for either admins only or to all users. It can also be installed for users with specific profiles.

Step 5: Select **Install for All Users** and tick the acknowledge check box.

Step 6: Installation of the app begins, and the progress is shown.



Install DocFynd

By



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
DocFynd		DocFynd	1.0

[Additional Details](#)
[View Components](#)

Step 7: After installation, in the Quick Find box, enter “Users” and select the “Users” option.

Setup

Home

Object Manager

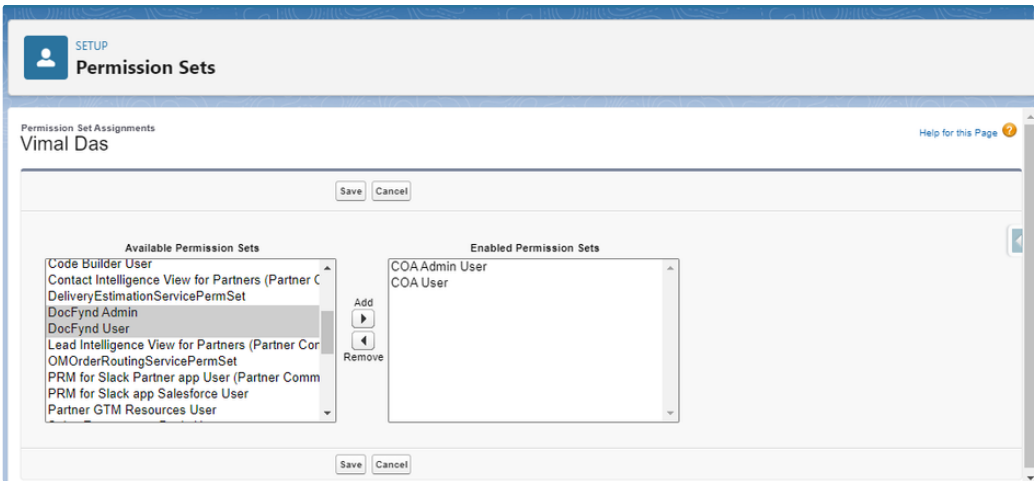
Quick Find

SETUP

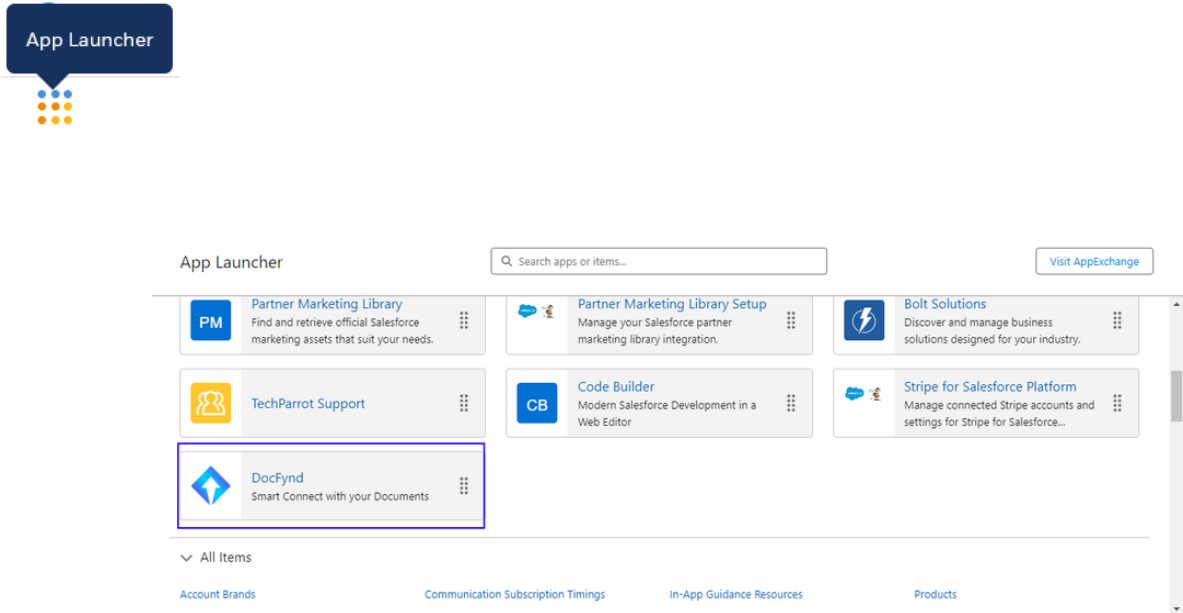
Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
	License Management App	salesforce.com	1.21	stLma	9/21/2022, 12:25 AM	☐	1	4	3	Passed
Description This is the app publishers use to track the different versions of managed packages and the licenses of subscribers who have installed them.										
	Checkout Management App	Checkout Management App Packaging Org	1.15	stLma	9/21/2022, 12:25 AM	☐	1	0	16	Passed
	Stripe Universal Connector	Stripe	1.12	stripeGC	3/26/2024, 10:30 AM	☐	1	3	7	Passed
	KPIapp Partner	KPIapp Namespace Org	1.97	KPIapp	9/21/2022, 12:25 AM	☐	2	4	6	Passed
	PBO Guide	PBO Guide	1.4	pboGuide	9/21/2022, 12:25 AM	☐	0	0	0	Passed
	Code Builder	Salesforce	1.1	CodeBuilder	1/31/2024, 11:48 PM	☐	1	3	2	Passed
	SFDC Channel Order	Channel Order Management	3.69	CHANINEL_ORDERS	9/21/2022, 12:25 AM	☐	1	10	12	Passed
	DocFynd	DocFynd	1.0	docfynd	4/19/2024, 6:55 AM	☒	1	7	15	Not Passed

Step 8: Add the “DocFynd Admin” and “DocFynd User” permission sets to the current user.



Step 9: Click the “App Launcher” icon and select the “DocFynd” app. The app is now ready to use.



✔ This completes the installation process for the app. DocFynd app is now ready to use.