

INFLUENCER CHECK Post Deployment step

Step 1 : Flow Setup

Figure 1:

- I. Go to the **Object Manager**. Select **Contact**.
- II. You will see the **Contact Edit Object** page. Select **Lightning Record Pages**.
- III. You will see multiple record pages. Select the record page where you want to access the flow.
- IV. If you already have an existing record page, skip **Step 2**.

Step 2: Create a New Lightning Record Page

Figure 2 :

- I. Click **New** to create a new record page.
- II. Choose **Record Page**, then click **Next**.
- III. Enter a **Label** for the record page.
- IV. In the **Object** field, select **Contact**, then click **Next**.
- V. Choose a page template. Select **Grouped Header and One Region**, then click **Next**.
- VI. Proceed to **Step 3**.

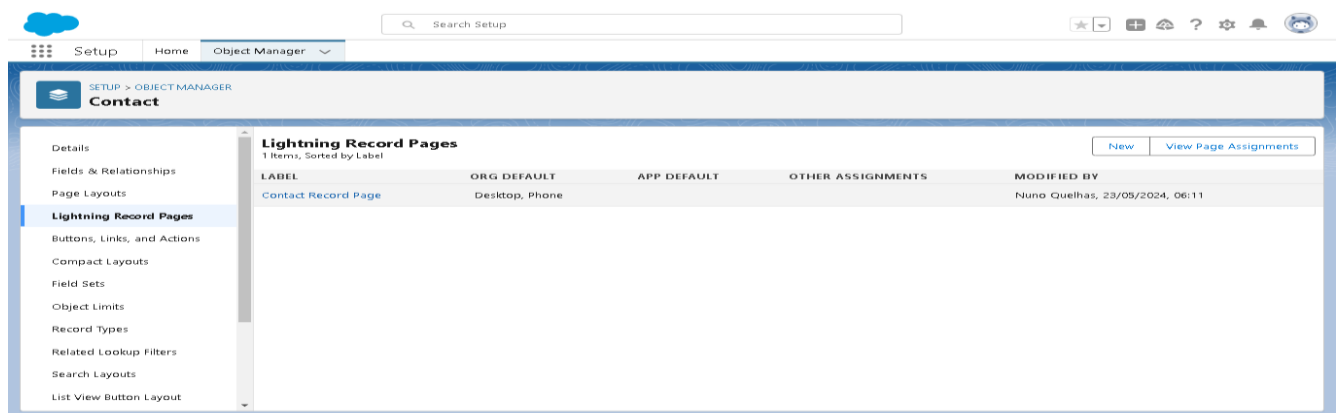


Figure : 1

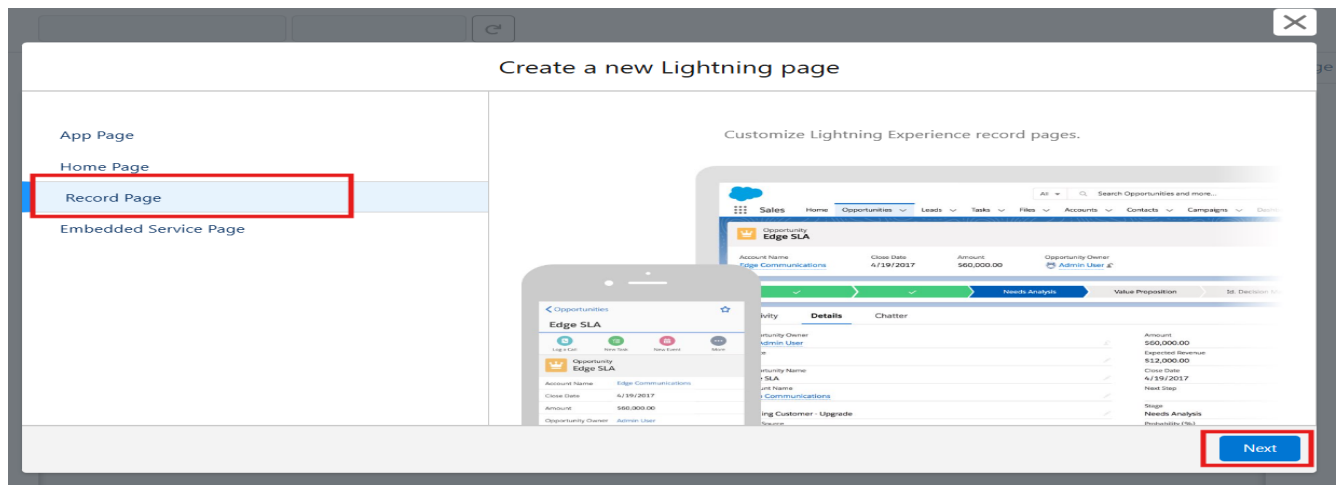
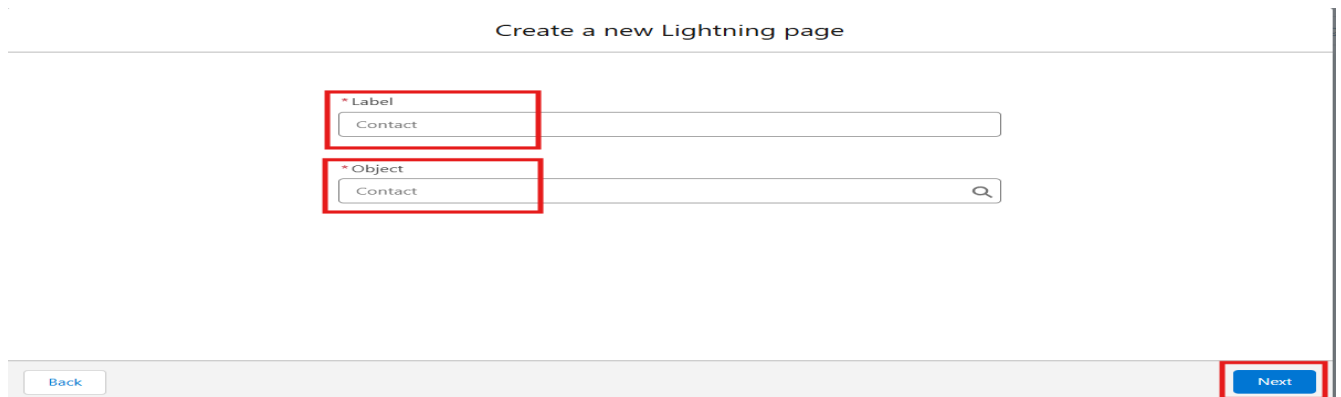


Figure 2.1



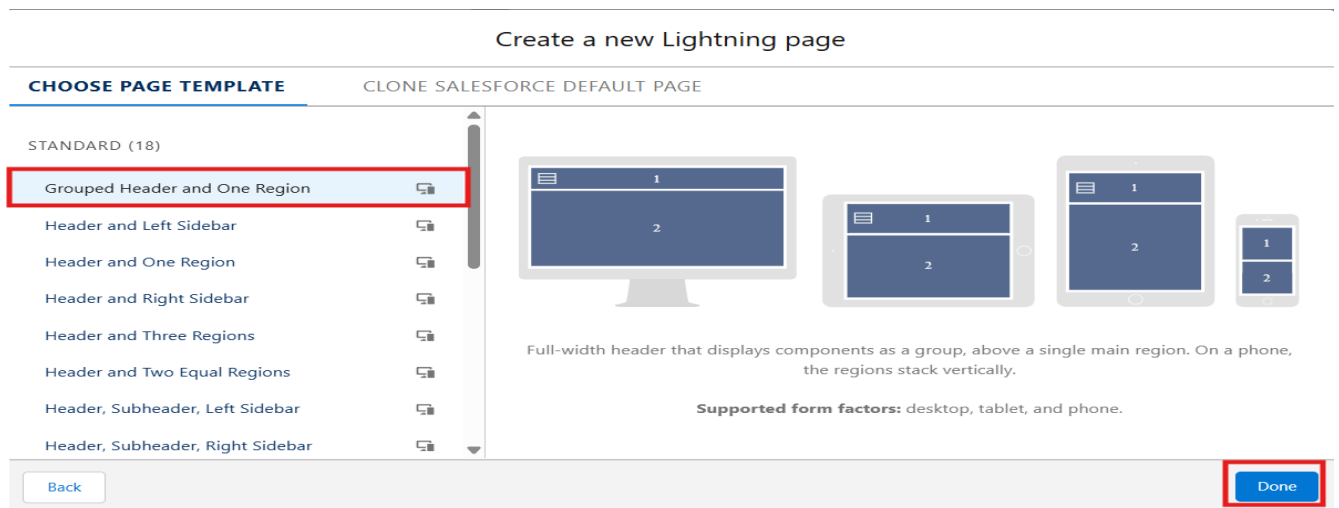
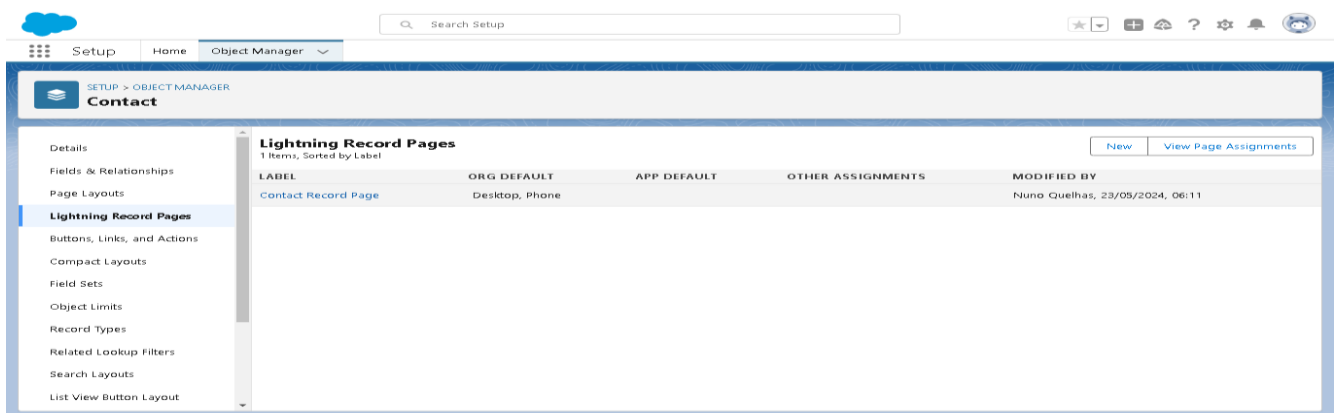


Figure 2.2

Step 3 : Edit UI Figure : 3

1. Select the record page and click the **Edit** option
2. In the left-side panel, you will see the **Flow** component.
3. Drag and drop the flow into the record page.
4. In the right-side panel, you will see the flow settings options. Select the flow name as **Contact Email Screen - Influencer**.
5. Enable the **RecordId**.



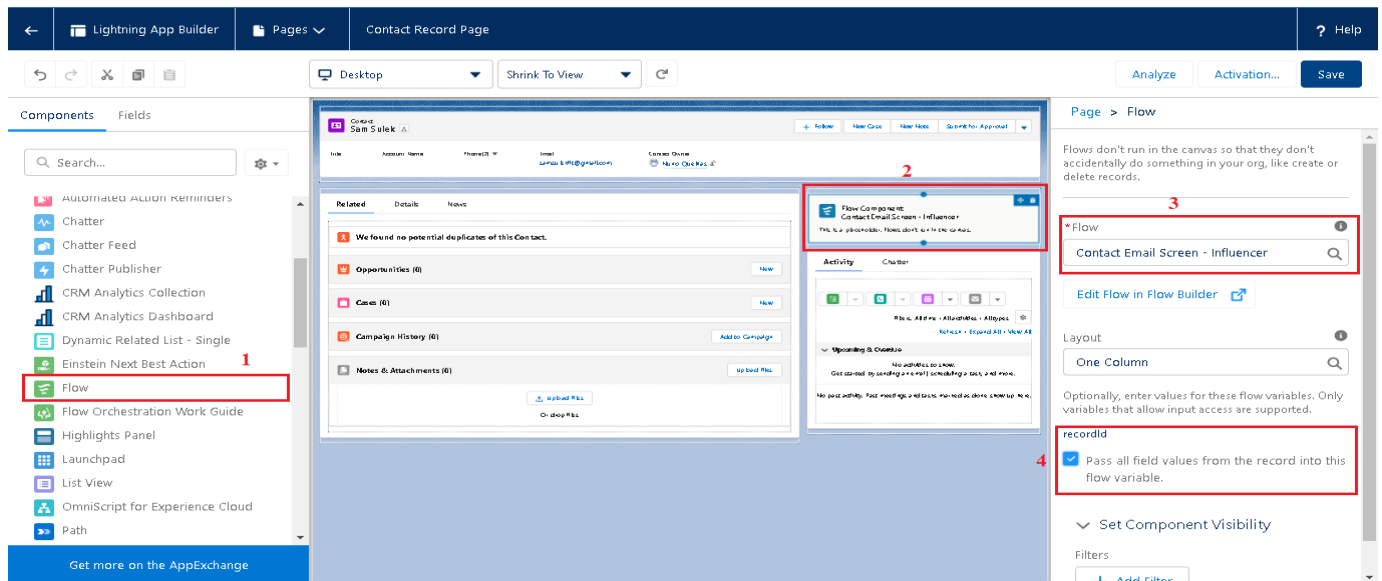


Figure : 3

Figure : 4

6. In the left-side panel, you will see the **Dynamic Related List - Single** component.

7. Drag and drop the component into the record page.

8. In the right-side panel, you will see some options. In the **Parent Record** search box, select **Use this contact**.

9. In the **Related List** search box, select **Influencer Match**.

10. In the **Related List Fields**, you can add some fields. For example:
Social Username, Type, URL, etc.

11. Finally, **Save** the record page.

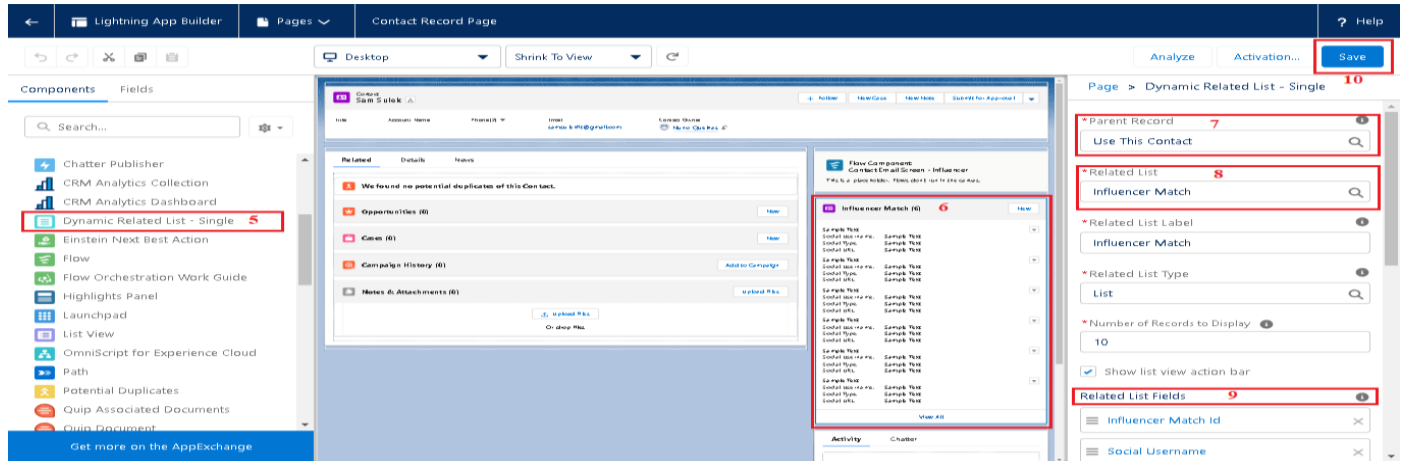


Figure : 4

Assign User to Permission Set

Figure 5

I. Go to Setup.

II. Search Permission Set.

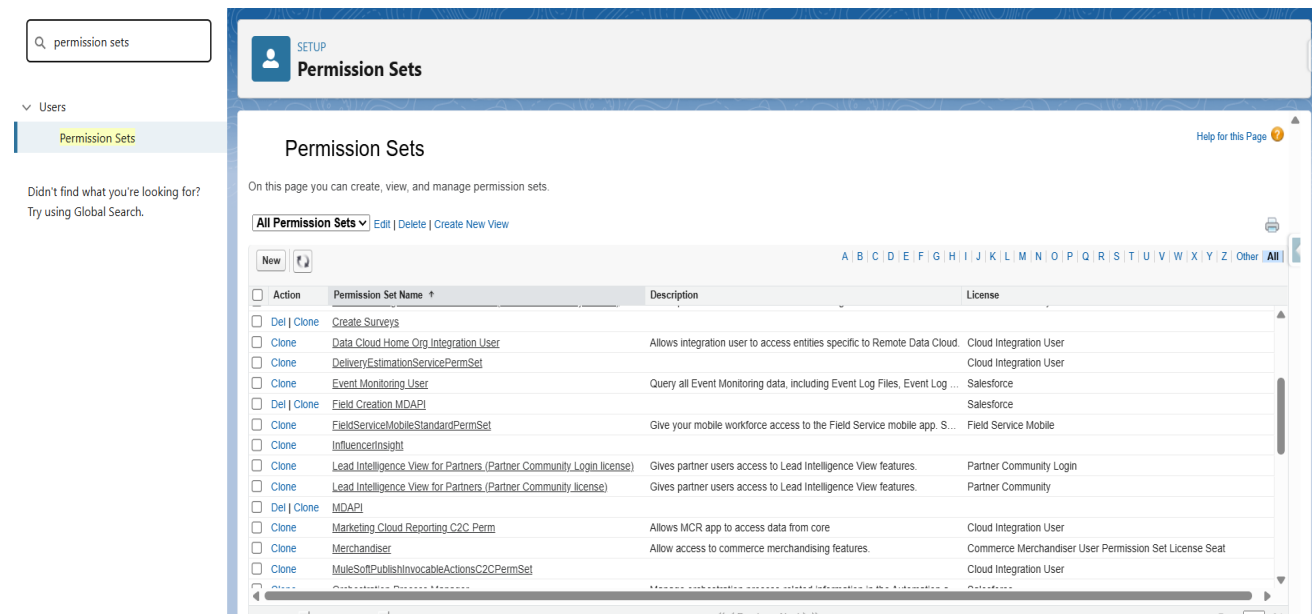


Figure : 5

Click "INFLUENCERINSIGHT" in the Permission Set.

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets ▾ [Edit](#) | [Delete](#) | [Create New View](#)

New ↻

A | B | C | D | E | F | G | H

☐	Action	Permission Set Name ↑	Description
☐	Clone	DeliveryEstimationServicePermSet	
☐	Clone	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log ...
☐	Del Clone	Field Creation MDAPI	
☐	Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. S...
☐	Clone	InfluencerInsight	
☐	Clone	Lead Intelligence View for Partners (Partner Community Login licen...	Gives partner users access to Lead Intelligence View features.
☐	Clone	Lead Intelligence View for Partners (Partner Community license)	Gives partner users access to Lead Intelligence View features.
☐	Del Clone	MDAPI	
☐	Clone	Marketing Cloud Reporting C2C Perm	Allows MCR app to access data from core
☐	Clone	Merchandiser	Allow access to commerce merchandising features.
☐	Clone	MuleSoftPublishInvocableActionsC2CPermSet	
☐	Clone	Orchestration Process Manager	Manage orchestration process-related information in the Automation a...
☐	Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a Partn...
☐	Clone	Paumonte Administrator	Has all the user permissions to gate access to APIs that are available

Figure : 5

Figure 6:

- I. Click **"Manage Assignments"**.
- II. Click **"Add Assignments"**.
- III. Select the users who need permission to check the **Influencer Match** , then Click **'Next'**.
- IV. Click **"Assign"**.
- V. Click **"Done"**.

Permission Set

InfluencerInsight

Video Tutorial | Help for this Page

Find Settings...

[Clone](#)

Manage Assignments

[View Summary](#)

Permission Set Overview

Description

License

Session Activation Required ☐

Permission Set Groups Added To 0

API Name

Namespace Prefix

Created By

Last Modified By

InfluencerInsight

infcheck

Sakthiraj_K, 4/16/2025 1:00 AM

Sakthiraj_K, 4/16/2025 1:00 AM

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

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

Figure : 6.1

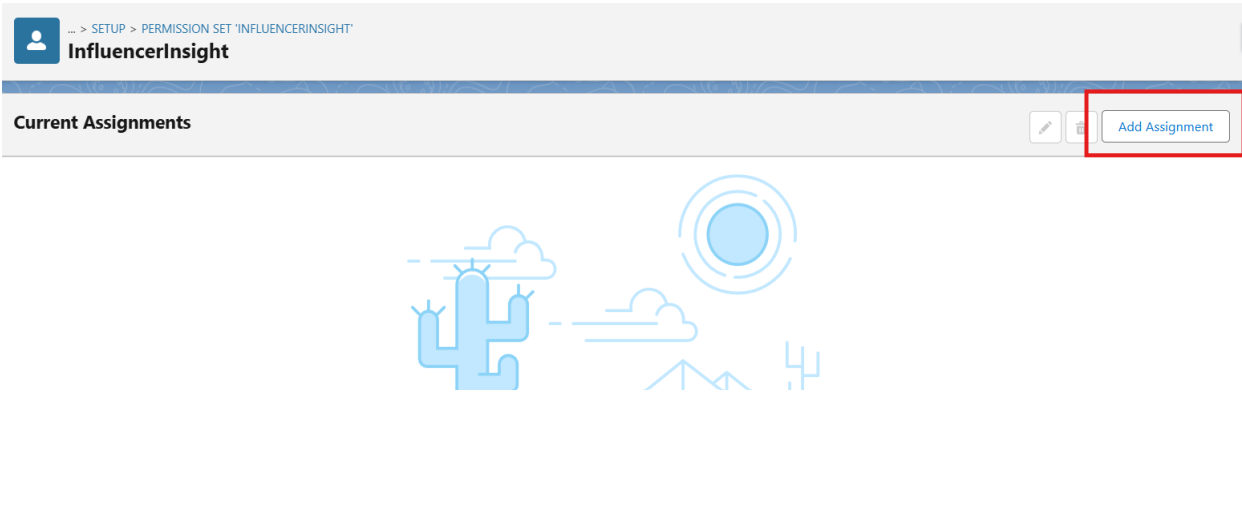


Figure : 6.2

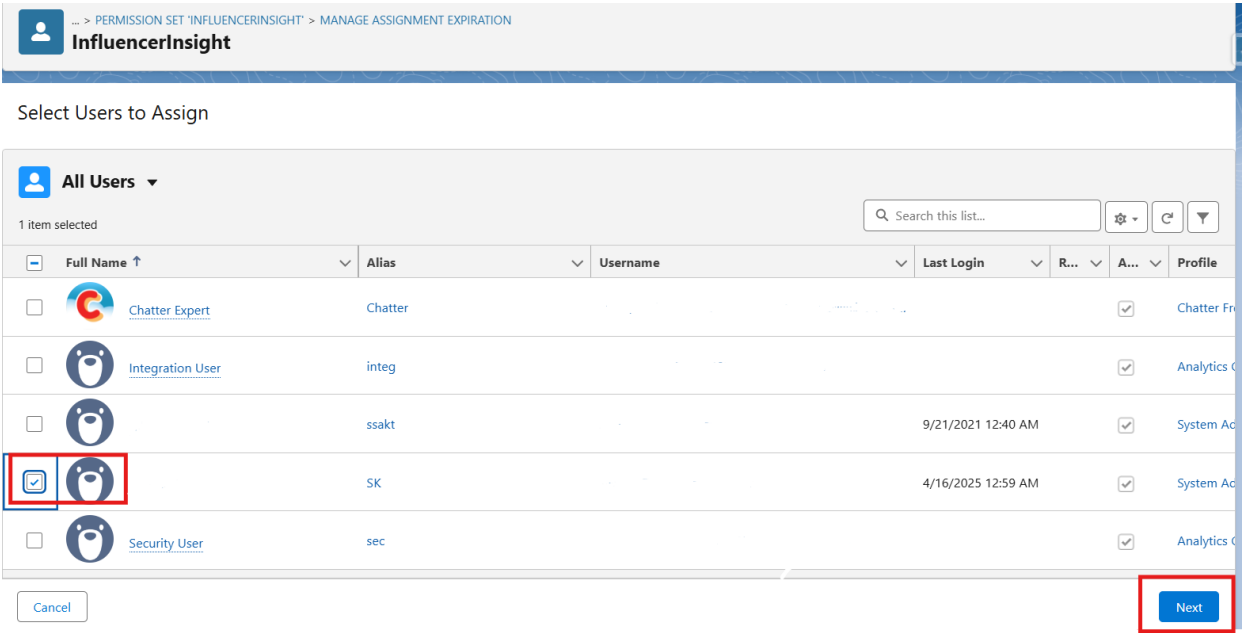


Figure : 6.3

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day1 Week30 Days60 DaysCustom Date

ⓘ Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
K		System Administrator	✓	Salesforce	Never Expires

Cancel

BackAssign

Figure : 6.4

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
K	Salesforce			✓ Success

Done

Figure : 6.5