



**BizIntellect Powered by Middelk
SalesForce Integrated App for Business Identification**

Installation Guide



1. Introduction

This document outlines steps for installing and configuring BizIntellect-Identity package. These steps must be performed by a Salesforce admin or by somebody who is aware of Salesforce platform and has prior experience of installing packages and configuring salesforce organizations

2. Pre-installation steps

1. Contact bizintellect@datacraim.com to get your Middesk subscription. You need the Middesk API key to complete the BizIntellect configuration.
2. Create a trusted site in your salesforce org. Below are the suggested values for trusted site
 - a. Site Label and Site Name: BizIntellect
 - b. Select a salesforce user for site contact, default record owner.
 - c. Select the checkbox 'Active'.
 - d. Choose an existing page for Active Site Home Page.
 - e. Note the default web address. We will use this value while creating webhooks on Middesk portal.
3. Make sure List type Custom settings are enabled on your org. In LEX, go to Setup | Home | Data | Schema Settings and Enable "Manage List Custom Settings Type".

3. Installing the package

1. Click on the package installation link.
2. Enter the installation key
3. Select which users to install the package.
4. Select 'Install' to complete the installation

4. Post Installation steps

1. Create/Update Custom Settings records
 - a. Under 'BizIntellect_Config' custom settings, create a record with following values: Name: MiddeskConfiguration, Named Credential Name: BizIntellect_Middesk, Client Name: <your company name>, Report Receiver Email ID: bizintellect@datacraim.com
2. Assign Permission set

- a. Assign 'BizIntellect_Permissions' to all the salesforce users who need to access BizIntellect. Assign this permission set to the guest user created during trusted site creation in pre-installation step.

3. Create External Credential

- a. Label: BizIntellect External credential
- b. Name: External_credential
- c. Authentication Protocol: Custom
- d. Create a new Principal with these values – Parameter Name: BizAPIKey, Sequence Number: 1, Identity Type: Named Principal. Create a new authentication parameter – Name: apikey, Value: <Middesk API key>
- e. Create a custom header with values – Name: Authorization, Value: Bearer {!\$Credential.External_credential.apikey}, Sequence Number: 1

4. Create Named Credential

- a. Label: BizIntellect Middesk, Name: BizIntellect_Middesk, URL: <https://api.middesk.com>, Enable for callouts selected.
- b. External credential: choose the one created in previous step
- c. Callout options: Select Generate Authorization Header and Allow Formulas in HTTP Header

5. Assign External Credential to User profile. Provide external credential principal access to all relevant profiles.
6. Assign and Activate Account page layout and lightning record pages to relevant profiles.
7. Create the following 3 Sharing Rules for Guest user, by selecting rule type as 'Guest user access, based on criteria'. Share with the guest user associated with trusted site.
 - a. Account criteria: Account name Not equal to <blank>
 - b. Business__c Name Not equal to <blank>
 - c. Username Not equal to <blank>
8. Create webhooks on Middesk portal.
9. Create a BI-API Call history report and set up a subscription to send the report to DataCRaiM every month. Reach out to DataCRaiM for more details.