
Partner Listing User Guide

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ADMIN USERGUIDE

What is included in the Salesforce IdyaFlow Partner Listings Marketplace (SIPL) App?

IdyaFlow package provides salesforce customers the ability to create a directory of partners providing complementary services. E.G partners provide various support services such as ongoing maintenance, emergency repairs, upgrades and so on.

What are the pre-install steps I need to complete?

Before installing SIPL, you will need to take 10-15 mins to complete the following to prep your org. You will also need Enterprise, Unlimited, Developer, or Performance Salesforce Editions. Salesforce Group, Essentials, and Professional Editions do not have API access. For more information please refer to this [Salesforce Article](#).

Salesforce Administrator Access

Administrators installing and/or managing SIPL must have a standard Salesforce System Administrator Profile. If you have a custom administrator profile and run into issues, please reach out to SIPL Support for assistance. Some capabilities are only available on System Administrator Profile.

Lightning or Classic Experience

All SIPL functionality is available in both Salesforce Lightning and Salesforce Classic mode.

Enable Digital Experiences

All SIPL external pages are hosted through a Salesforce community. Users will not be assigned to or need access to this community. To enable Digital Experiences please follow these steps.

From Setup, navigate to:

- Lightning: **Setup | Feature Settings | Digital Experiences | Settings.**
 - Classic: **Setup | Customize | Digital Experiences | Settings.**
 - Select the checkbox next to **Enable.**
-

Install SIPL!

Congratulations! You are now ready to install SIPL into your Salesforce sandbox or production environment.

Option 1: Get Support to help Install SIPL

To start this process, you will need to [submit a case](#) with our customer support team with the subject **SIPL Install Request**.

It's critical that you provide us the following 4 key attributes in your email (or case):

- **Org Name**
 - **Instance Type** (Production or Sandbox)
 - **Org ID**
 - **Install For You or Jointly** – Please specify which option you would prefer and provide the required details:
 - **Install For You** (Premier and Premier + Support) — You will need to create a Salesforce Admin user for our Support Team to login and install SIPL. The email address must be services@idyafLOW.com—so our team may finalize the login credentials.
 - **Jointly Install Together** — Simply state that you would prefer this option, and we will schedule a web conference call and perform the installation using your admin login with screen-sharing.
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Option 2: Self-Install SIPL

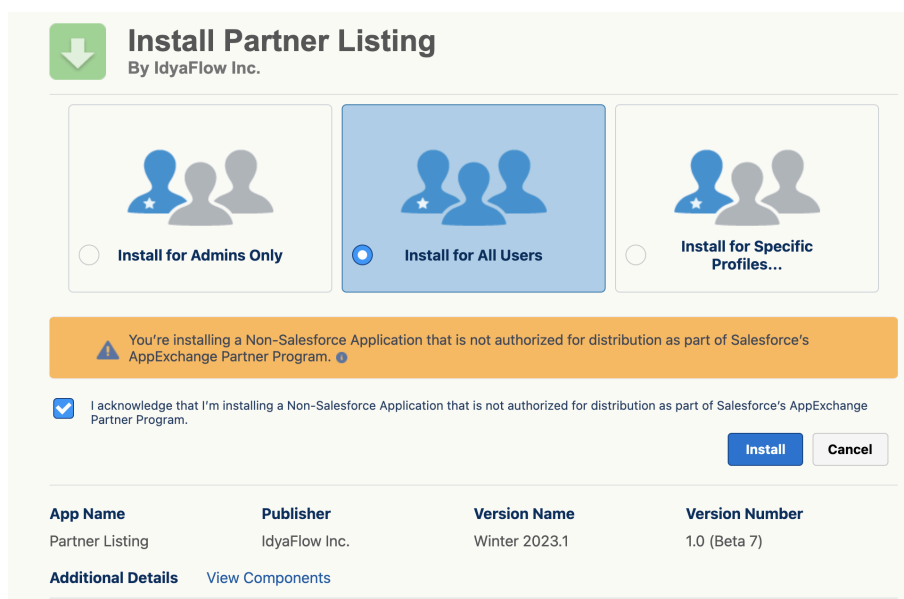
SIPL recommends installing into your Sandbox first.

For any support to help you complete the install process, please email us at services@idyafLOW.com, so our team can walk you through the process.

Install Request.

Use this procedure to install SIPL.

- First, make sure you are logged out of all Salesforce instances before starting the installation.
- Click [here](#) to install our latest version.
- You will be taken to the login screen. Enter your Salesforce Administrator **username** and **password** and click **Log In**.
- On the next page, select the “**Install for All Users**” to install SIPL for:



Install Partner Listing
By IdyaFlow Inc.

☐ 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
Partner Listing	IdyaFlow Inc.	Winter 2023.1	1.0 (Beta 7)

Additional Details [View Components](#)

.The installation process begins and can take up to 30 minutes. You will be notified by email when it is completed.

- Navigate to Setup – Apps - Packings - Installed Packages to confirm the installation.

NOTE: You can also view the status of the Installation by going to Setup > Deploy > Deployment Status