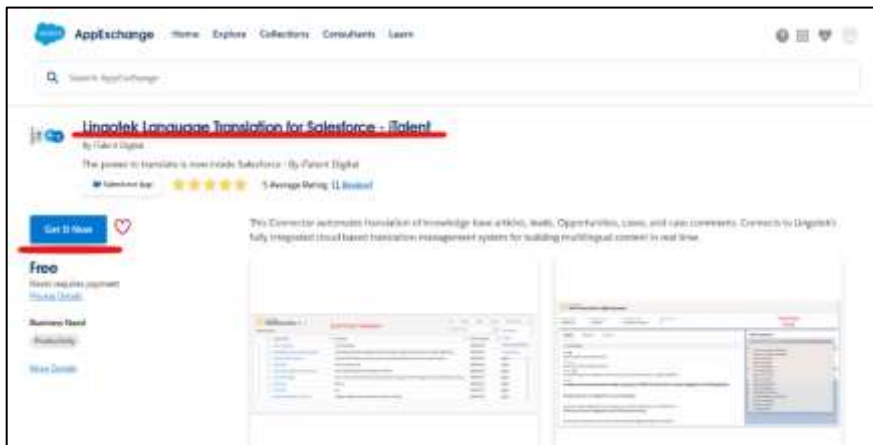


# Salesforce Connector Setup

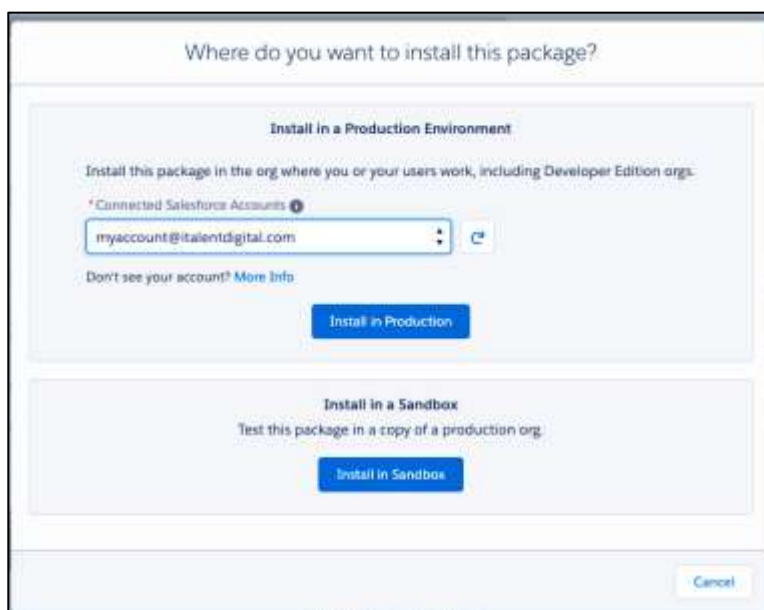
**NOTE: The below configurations are specific to Salesforce Classic Environment only.**

## Install Lingotek inside Salesforce Package

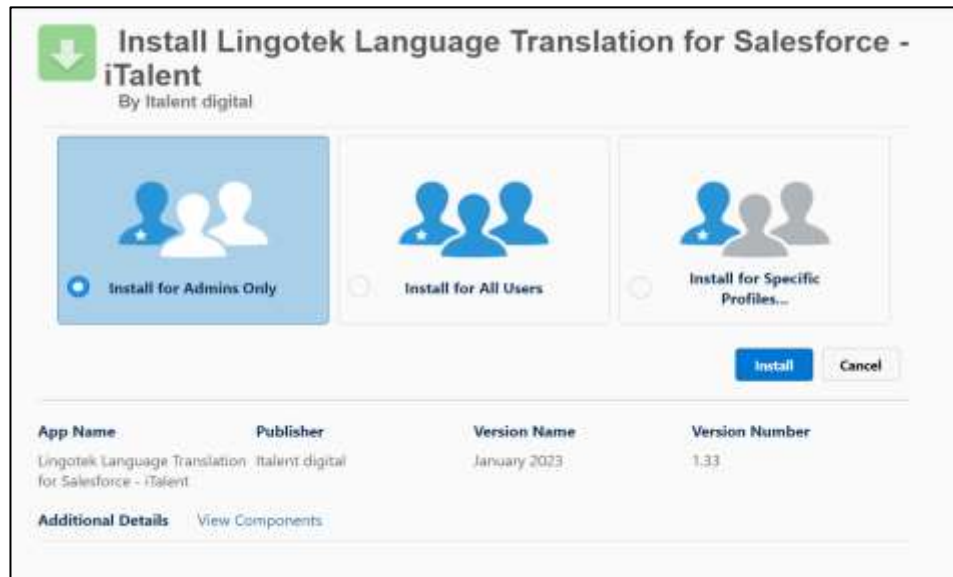
- 1) Login to App Exchange with your salesforce credentials and search for the “appLingotek Language translation for salesforce-iTalent”.
- 2) Click on Get it Now button to download App



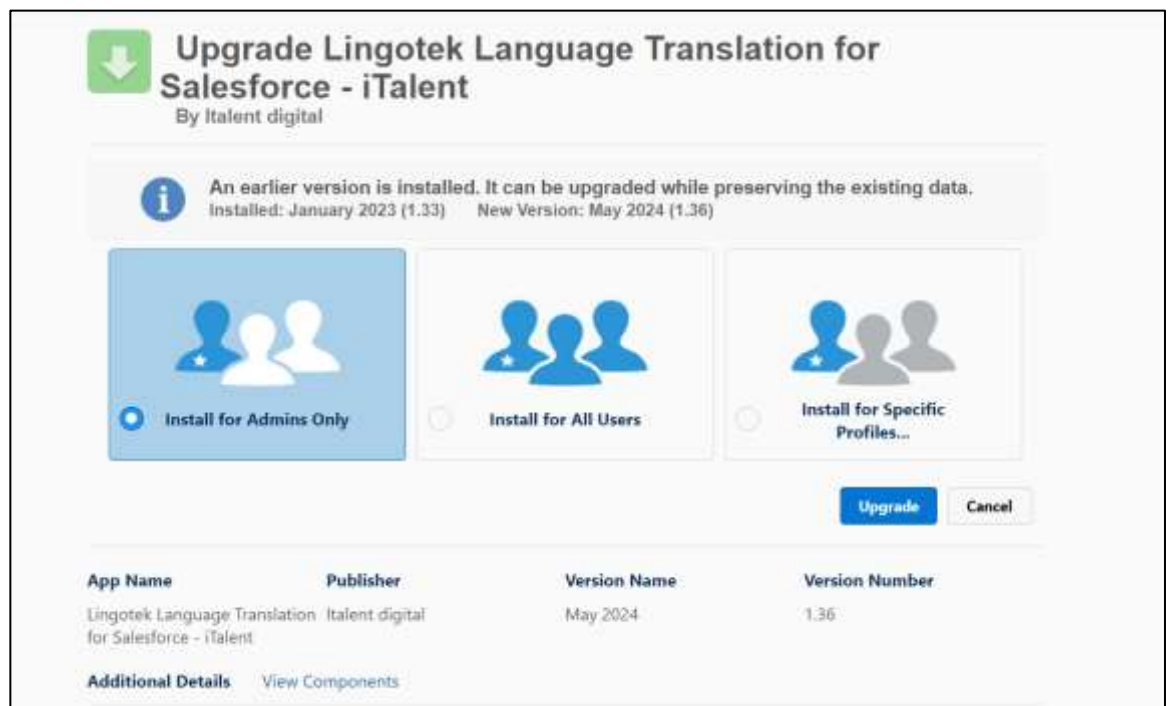
- 3) The link will take you to the following page, select appropriate environment where you want to install this app.



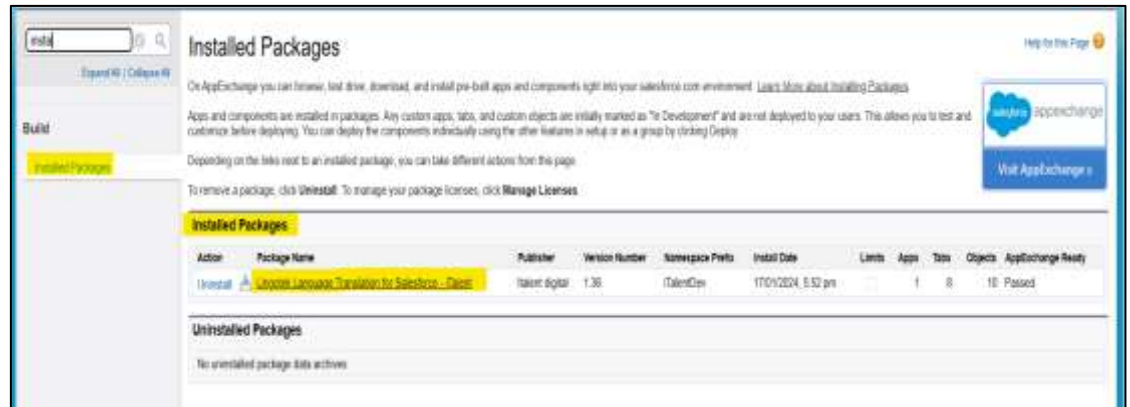
- 4) Click on the confirm and install button by selecting terms and condition checkbox.
- 5) After login you will be taken to the Package installation page,



- a) Select **“Install for Admins Only”**
- b) Click **“Install”**
- c) When we want to upgrade the same package to the latest version we need to click on **“Upgrade”**.



- d) A popup will appear asking for approval for third party access, click on “yes I grant access” and continue.
- e) If needed, check your email for confirmation that the installation is completed.
- f) **Verify the Installation** by reviewing the installed packages. Click on Setup then On the left, under Build select Installed Package.



## Configure Knowledge Settings

You can use existing user, or you can create new user for Knowledge Article translation.

### 1) Add/Edit a User

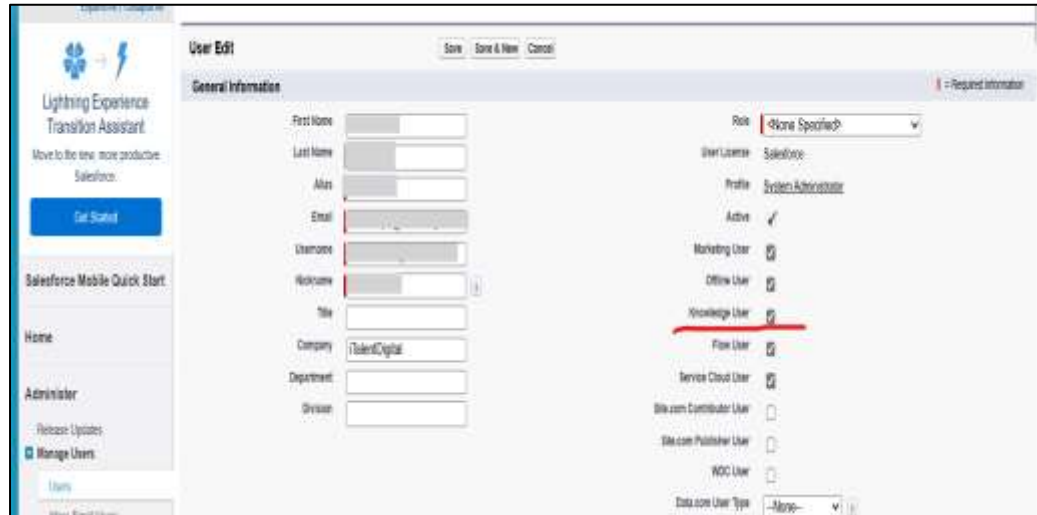
- 1) From the main menu, select **Setup**.
- 2) On the left under **Administrate**, select **Manage Users > Users**.
- 3) In the main window, click **New User**.



- 4) Complete the required fields (red) and any other desired fields.

Scroll down to ensure all required fields are complete.

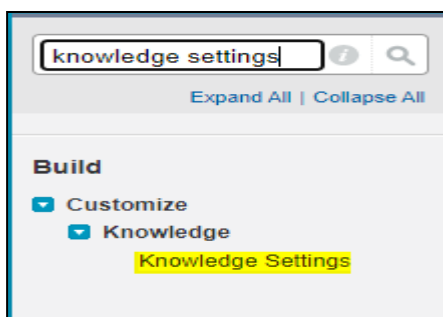
- 5) Enable the checkbox for **Knowledge User**.
- 6) When you are ready, scroll down and click Save.

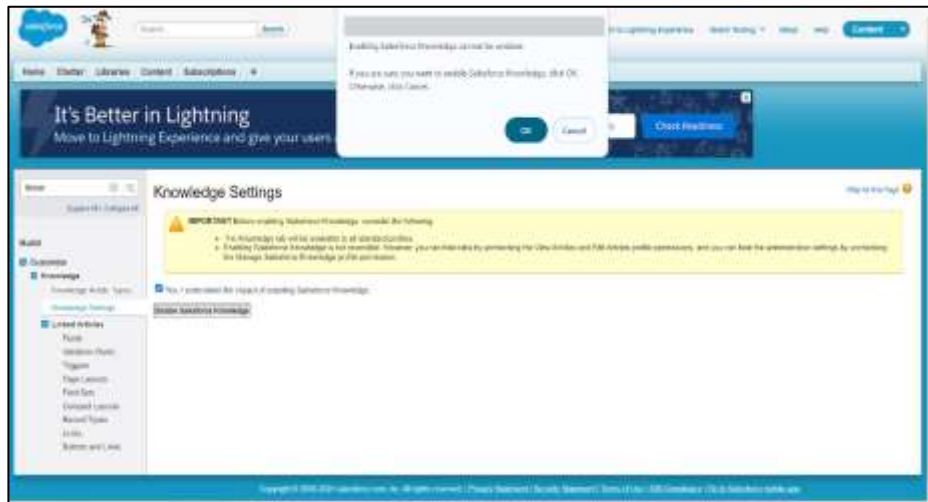


## Enabling Salesforce Knowledge

In left sidebar of page, select **Customize** which will expand into a dropdown menu, and then select **Knowledge** from this menu. Another dropdown menu will appear, select **Knowledge Settings** from this menu and **Enable Salesforce Knowledge**.

Setup > Build > Customize > Knowledge > Knowledge settings.



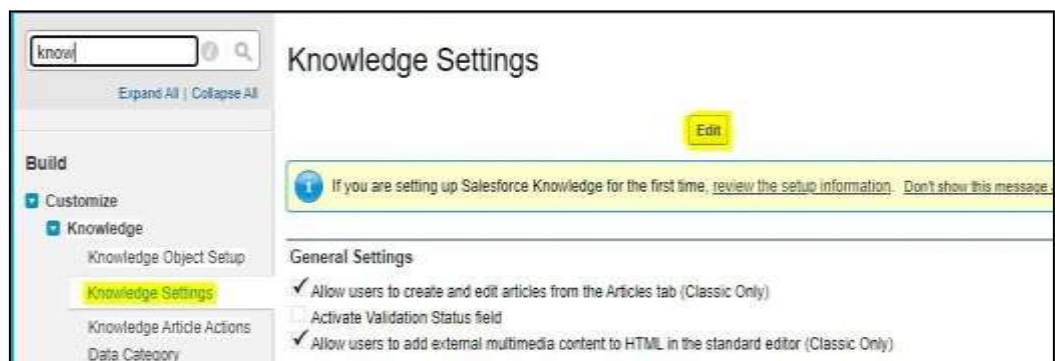
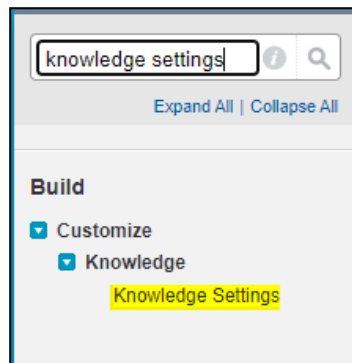


A pop up appears giving an alert click on ok:



## Enabling Multiple Languages for Knowledge

- 1) Setup > Build > Customize > Knowledge > Knowledge settings.
- 2) Click **Edit**, go to the field Language settings, and select the radio button for **Multiple Languages** and select the **Default Assignee (Knowledge User)**.



**Note: The Default Assignee should be the user we created (Lingotek User)**

## Enable Lightning Knowledge

- 1) Setup > Build > Customize > Knowledge > Knowledge settings.
- 2) Click **Edit** and enable checkbox for **Enable Lightning Knowledge**.
- 3) Click **Save**.

# Knowledge Settings

Edit



If you are setting up Salesforce Knowledge for the first time, [review the setup information](#). [Don't show this message again](#)

---

## General Settings

- ☒ Allow users to create and edit articles from the Articles tab (Classic Only)
- ☒ Activate Validation Status field
- ☒ Allow users to add external multimedia content to HTML in the standard editor (Classic Only)

---

## Lightning Knowledge Settings

- ☒ Enable Lightning Knowledge
- ☐ Enable automatic loading of rich-text editor when editing an article

## Create Custom Fields for Knowledge

**Note:** Optional Part for Creation of Fields in Knowledge Object (Based on requirement it is different for each customer)

- 1) Setup > Build > Customize > Knowledge > Knowledge Object Setup.
- 2) Create a Knowledge Object related Custom Fields (Like Question and Answer), Navigate to the **Knowledge Object Setup** within **Fields** click on new

Know

Expand All

Collapse All

Build

Customize

Knowledge

Knowledge Object Series

Validation Statistics

Knowledge Settings

Knowledge Article Actions

Data Catalog

Knowledge Base

Knowledge

Tools (0)

Field Sets (3)

Channel Owners (0)

Validation Rules (0)

Edge Links (0)

Contract Links (0)

Search Links (0)

Communication Channel Releases (0)

Recent Trays (0)

Knowledge Base Detail

Edit

Cancel

|                |                     |                     |                      |
|----------------|---------------------|---------------------|----------------------|
| Singular Label | Knowledge           | Description         |                      |
| Plural Label   | Knowledge           | Track Field History |                      |
| Object Name    | Knowledge           | Deployment Status   | Deployed             |
| API Name       | Knowledge__c        |                     |                      |
| Created By     | Salim, Digital      | Modified By         | Salim, Digital       |
|                | 18/01/2024, 3:37 pm |                     | 21/05/2024, 11:20 am |

Fields

New

Field Dependencies

Help for this Page

Field Help

- 3) Select Data Type for your field and click on Next Button

Knowledge

New Custom Field

Help for this Page

Step 1. Choose the field type

Step 1

Next

Cancel

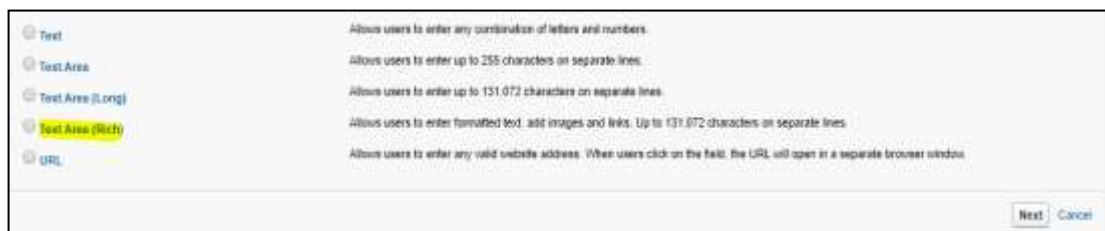
Specify the type of information that the custom field will contain.

Data Type

- 4) Enter the Name of Field in Field Label and give the length of the field and Click on Next



- 5) In Next page give the Visible and Read only permissions for this field to other Profiles based on need and click



Next



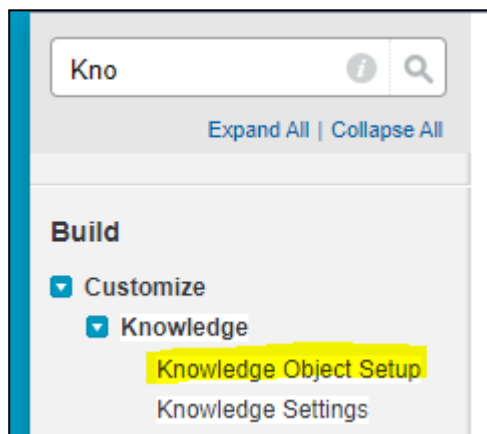
| Field-Level Security for Profile | Visible                             | Read-Only                |
|----------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Authenticated Website            | <input type="checkbox"/>            | <input type="checkbox"/> |
| Authenticated Website            | <input type="checkbox"/>            | <input type="checkbox"/> |

6) Select the page layout and **save** it.



## Create Field Set for Knowledge

1) Setup > Build > Customize > Knowledge > Knowledge settings.



2) Scroll down to the **Field Sets** section and click **New**

| Field | Source Definition                | Namespace  | Namespace ID |
|-------|----------------------------------|------------|--------------|
| Field | Website Internal App             | WebsiteApp | WebsiteApp   |
| Field | Website in Public Knowledge Base | WebsitePub | WebsitePub   |
| Field | Website in Customer              | WebsiteCap | WebsiteCap   |
| Field | Website in Partner               | WebsitePro | WebsitePro   |

**Field Sets** [New](#) [Field Sets Help](#)

No field sets defined

**Channel Displays** [Get](#)

| Channel               | Tab             |
|-----------------------|-----------------|
| Internal App          | Tab             |
| Partner               | Tab             |
| Customer              | Tab             |
| Public Knowledge Base | Tab of Contents |

- 3) Provide the Field Set Label – **italent**
- 4) Provide the Field Set Name – also **italent**
- 5) For the box that asks *Where is this used?*, you can also say **italent**

Knowledge Field Set  
New Field Set

**Field Set Edit** [Save](#) [Cancel](#)

**Enter Field Set Information**

Field Set Label

Field Set Name

Namespace Prefix

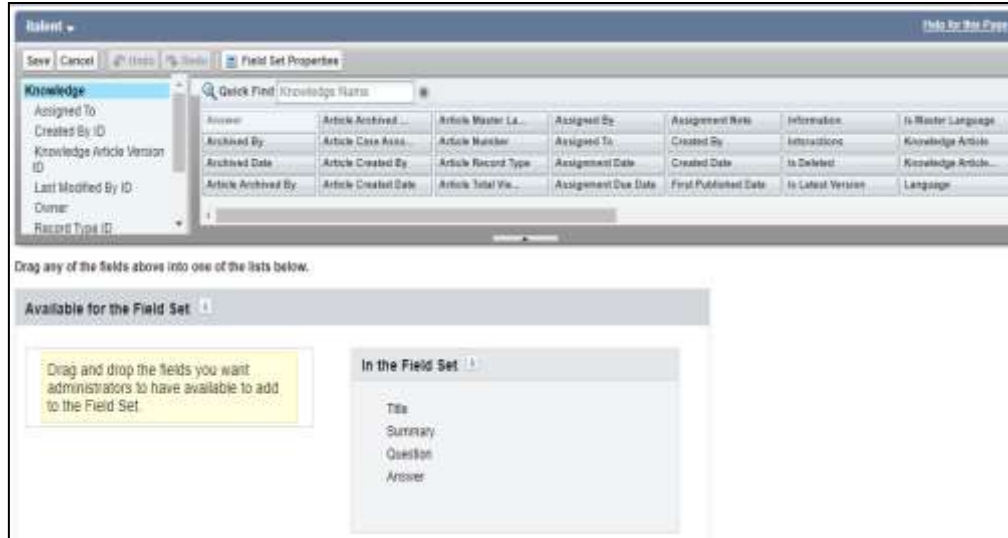
Where is this used?

[Save](#) [Cancel](#)

- 6) When you are ready, click **Save**.
- 7) You will be taken to the italent Field Set page.

**Note:** *These are the fields you want to have translated*

- 8) On this page, you can drag and drop Quick Fields into the Field Set from the top box to down below.



Field Set Properties

Save Cancel Undo Redo

Knowledge

Assigned To  
Created By ID  
Knowledge Article Version ID  
Last Modified By ID  
Owner  
Record Type ID

Quick Find Knowledge Name

|                     |                      |                      |                     |                      |                   |                      |
|---------------------|----------------------|----------------------|---------------------|----------------------|-------------------|----------------------|
| Answer              | Article Archived...  | Article Master LA... | Assigned To         | Assignment Rule      | Information       | Is Master Language   |
| Archived By         | Article Case Ass...  | Article Number       | Assigned To         | Created By           | Interactions      | Knowledge Article    |
| Archived Date       | Article Created By   | Article Record Type  | Assignment Date     | Created Date         | Is Deleted        | Knowledge Article... |
| Article Archived By | Article Created Date | Article Total Vie... | Assignment Due Date | First Published Date | Is Latest Version | Language             |

Drag any of the fields above into one of the lists below.

Available for the Field Set

Drag and drop the fields you want administrators to have available to add to the Field Set

In the Field Set

- Title
- Summary
- Question
- Answer

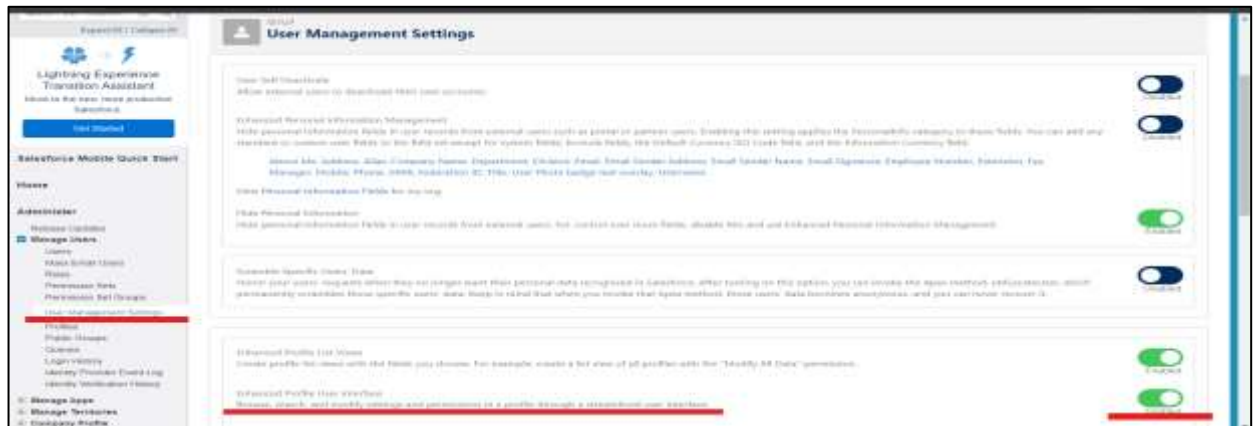
- 9) Once you have chosen your desired fields, click **Save** in the upper left corner of the box.
- 10) You will be directed to the **Field Sets** list for the article type you are working with.



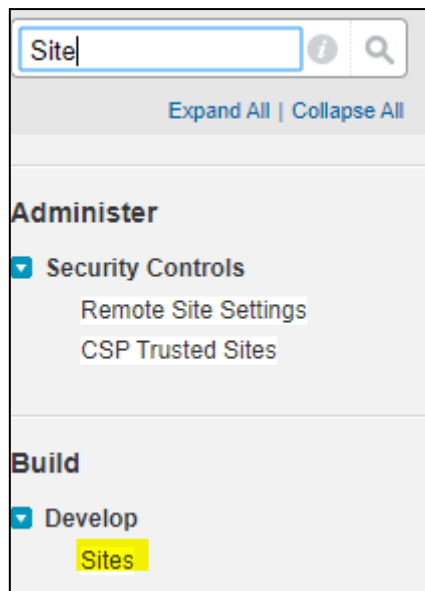
| Action                                   | Field Label | API Name | Where is this used? |
|------------------------------------------|-------------|----------|---------------------|
| <a href="#">Edit</a> <a href="#">Del</a> | iTalent     | iTalent  | iTalent             |

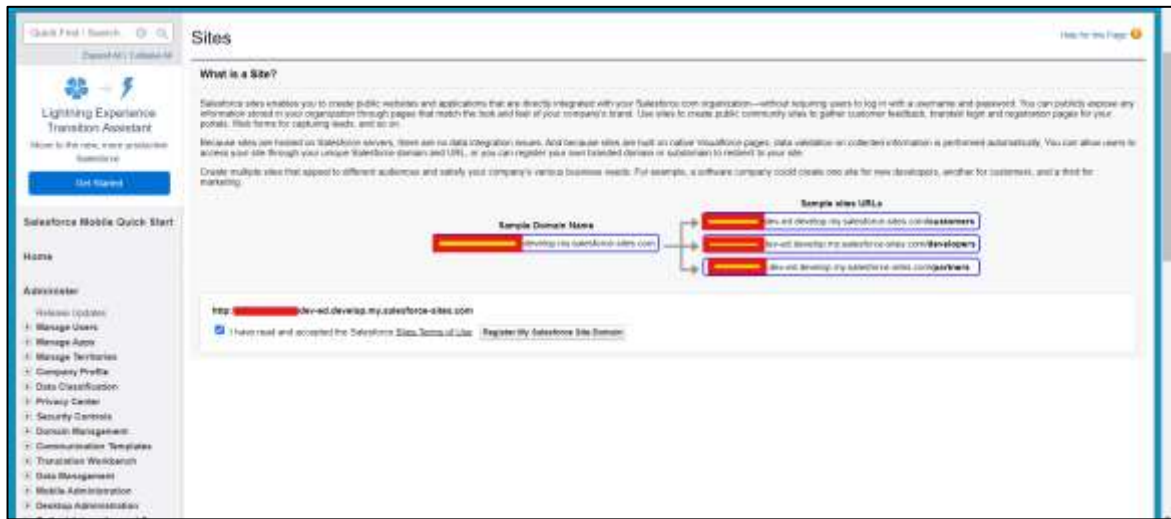
## Configure Site Settings

- 1) Navigate to left sidebar of Setup > Managed Users > User Management Settings and Enable Enhanced Profile User Interface rest all the settings should be default settings.

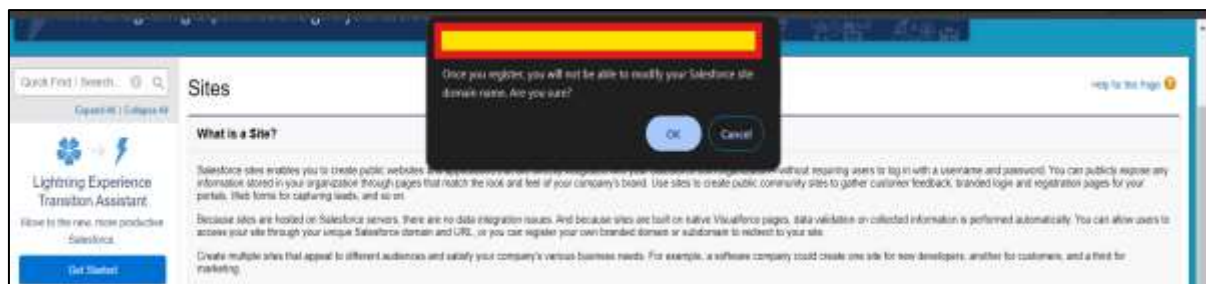


2) From left sidebar of setup > Build > Develop > Site





3) You Need to Create domain for your Org (If there is no Domain)



A pop up appears giving an alert saying the site cannot be modified once created click “ok”

4) Once Domain Created now you can be able to create Sites.

**Sites** [Help for this Page](#)

**What is a Site?**

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.

**Sample Domain Name**

dev-ed.develop.my.salesforce-sites.com

**Sample sites URLs**

- dev-ed.develop.my.salesforce-sites.com/customers
- dev-ed.develop.my.salesforce-sites.com/developers
- dev-ed.develop.my.salesforce-sites.com/partners

Your Salesforce site domain name is **dev-ed.develop.my.salesforce-sites.com**

[Salesforce Sites Terms and Conditions](#)

**Settings**

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login.

[Save](#) [Cancel](#)

**Sites** **dev-ed.develop.my.salesforce-sites.com** [New](#)

| Active                                          | Site Label | Site URL                | Site Description | Active                              | Site Type | Last Modified By    |
|-------------------------------------------------|------------|-------------------------|------------------|-------------------------------------|-----------|---------------------|
| <a href="#">Edit</a> <a href="#">Deactivate</a> | Lingotek   | dev-ed.develop.my.sites | Lingotek         | <input checked="" type="checkbox"/> | Force.com | 10/12/2014, 3:59 pm |

5) On the Sites Homepage, click **New** at the top of the Sites field,

**Sites** [Help for this Page](#)

**What is a Site?**

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

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**Sample sites URLs**

- dev-ed.develop.my.salesforce-sites.com/customers
- dev-ed.develop.my.salesforce-sites.com/developers
- dev-ed.develop.my.salesforce-sites.com/partners

Your Salesforce site domain name is **dev-ed.develop.my.salesforce-sites.com**

[Salesforce Sites Terms and Conditions](#)

**Settings**

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login.

[Save](#) [Cancel](#)

**Sites** **dev-ed.develop.my.salesforce-sites.com** [New](#)

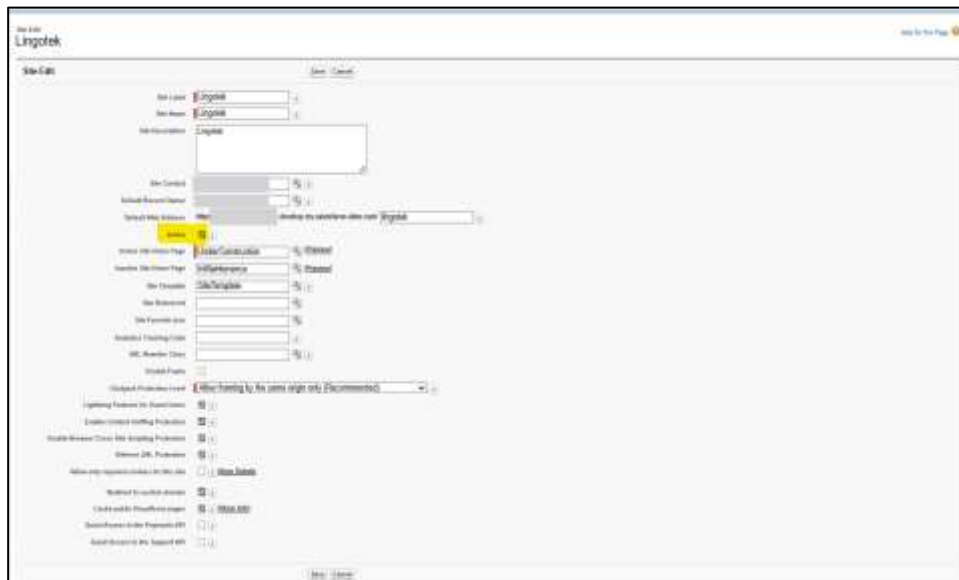
| Active                                          | Site Label | Site URL                | Site Description | Active                              | Site Type | Last Modified By    |
|-------------------------------------------------|------------|-------------------------|------------------|-------------------------------------|-----------|---------------------|
| <a href="#">Edit</a> <a href="#">Deactivate</a> | Lingotek   | dev-ed.develop.my.sites | Lingotek         | <input checked="" type="checkbox"/> | Force.com | 10/12/2014, 3:59 pm |

7) Specify the Site Label (call it **Lingotek** once again)

8) The Default Web Address will also be **lingotek**

9) The Active Site Homepage does not matter so you may put **Under Construction**

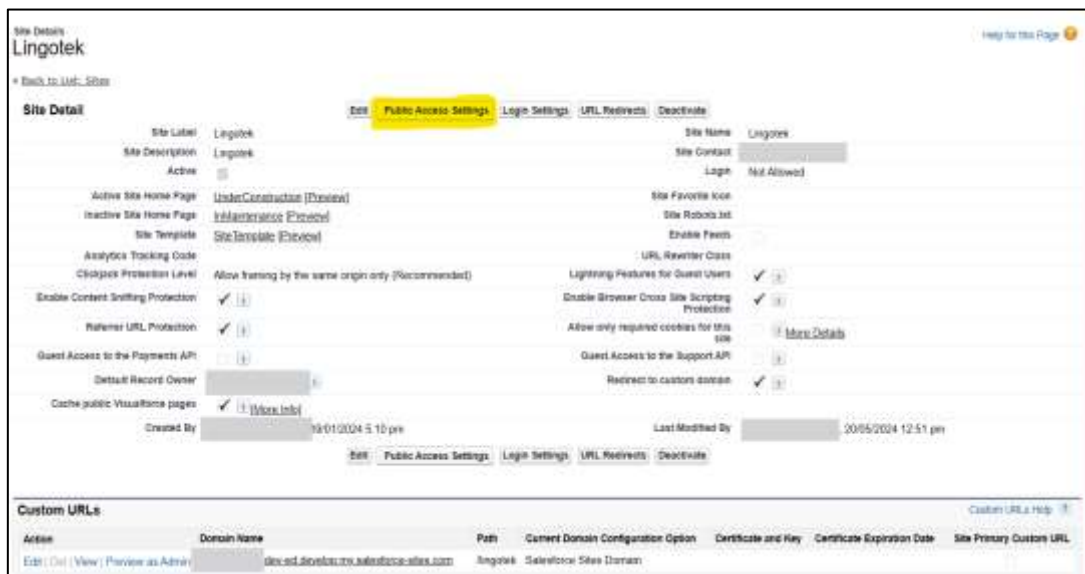
10) Make sure that the site is checked as **Active**.



The screenshot shows the 'Site Edit' page in the Lingotek interface. The 'Active' checkbox is highlighted in yellow, indicating it should be checked. Other visible fields include Site Label, Site Name, Site Description, Site Contact, Site Home Page, Site Template, Analytics Tracking Code, Clickjack Protection Level, Enable Content Sniffing Protection, Enable Browser Cross Site Scripting Protection, Enable URL Protection, Guest Access to the Payments API, Default Record Owner, Cache public Visualforce pages, and a 'More Info' link.

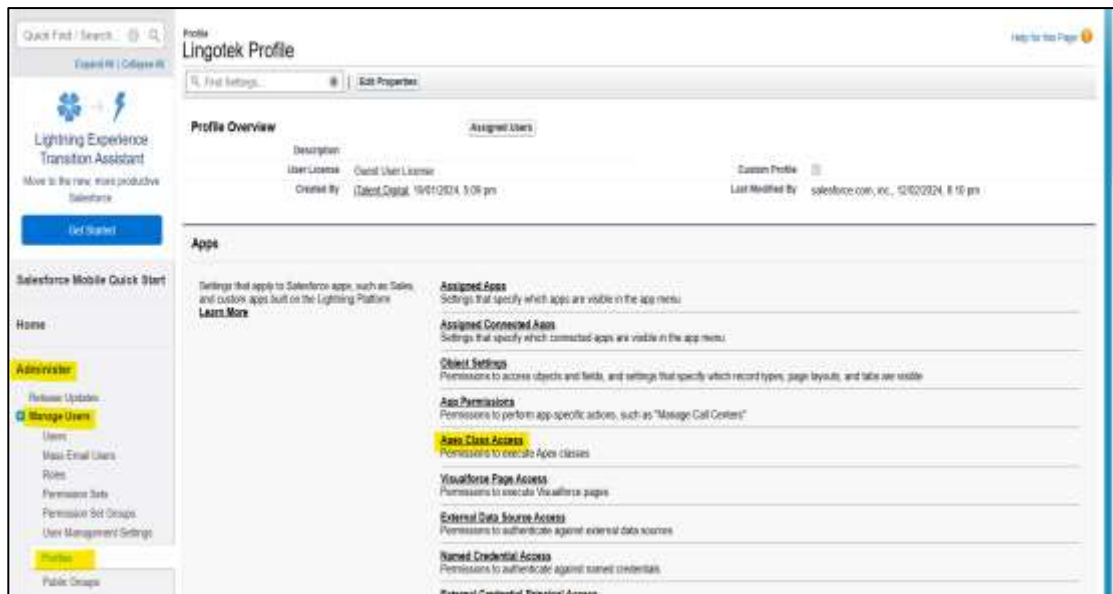
11) Then click **Save**. You will be taken to the Lingotek Site homepage.

12) Click **Public Access Settings** at the top of the page, and you will be taken to the Lingotek Profile page.



The screenshot shows the 'Site Details' page in the Lingotek interface. The 'Public Access Settings' tab is highlighted in yellow. The page displays various site details, including Site Label, Site Name, Site Description, Site Contact, Site Home Page, Site Template, Analytics Tracking Code, Clickjack Protection Level, Enable Content Sniffing Protection, Enable Browser Cross Site Scripting Protection, Enable URL Protection, Guest Access to the Payments API, Default Record Owner, Cache public Visualforce pages, and a 'More Info' link. The 'Public Access Settings' section includes fields for Site Name, Site Contact, Site Home Page, Site Template, Analytics Tracking Code, Clickjack Protection Level, Enable Content Sniffing Protection, Enable Browser Cross Site Scripting Protection, Enable URL Protection, Guest Access to the Payments API, Default Record Owner, Cache public Visualforce pages, and a 'More Info' link.

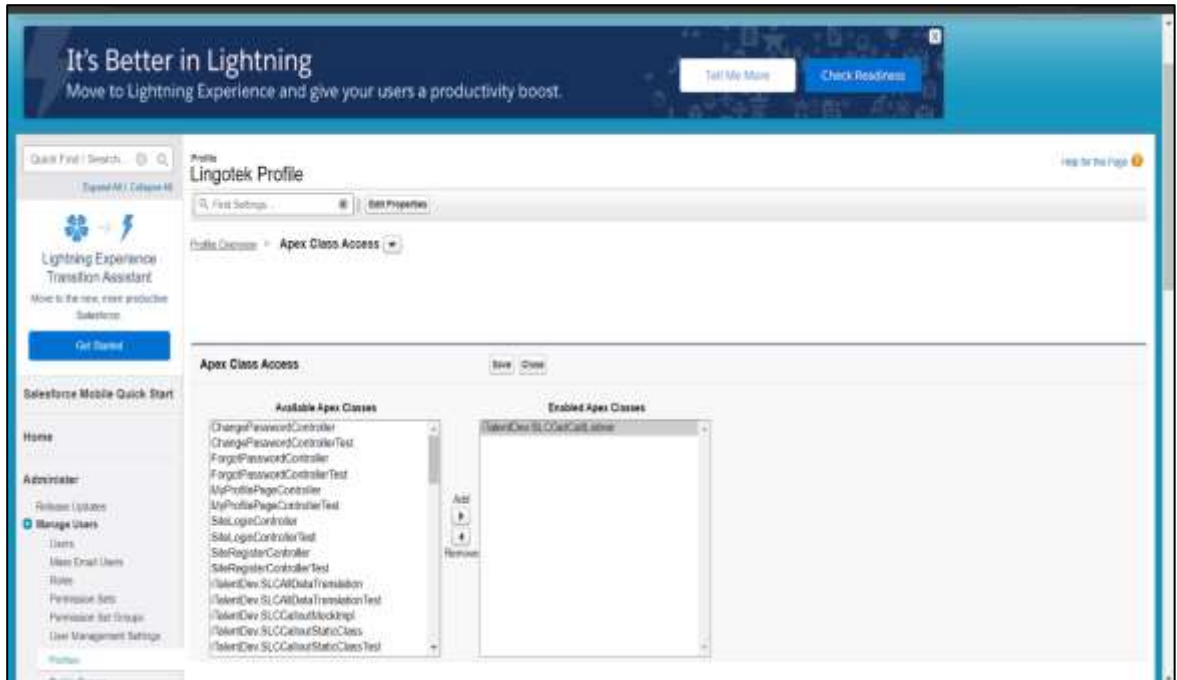
13) Under the Apps field, select **Apex Class Access**



14) On the next page, click **Edit** at the top of the page.



15) Select the **iTalentDev.SLCGetCallListner** Apex Class and click **Add**. Then, click **Save**.



|                                                   |      |    |            |                                          |
|---------------------------------------------------|------|----|------------|------------------------------------------|
| <a href="#">SLC Language</a>                      | Read | 7  | Tab Hidden | SLC Language Layout                      |
| <a href="#">SLC Translated CaseComment Detail</a> | Read | 14 | Tab Hidden | SLC Translated CaseComment Detail Layout |
| <a href="#">SLC Translated Case Detail</a>        | Read | 15 | Tab Hidden | SLC Translated Case Detail Layout        |
| <a href="#">SLC Translated KB Detail</a>          | Read | 7  | Tab Hidden | SLC Translated KB Detail Layout          |
| <a href="#">SLC Translated Lead Detail</a>        | Read | 17 | Tab Hidden | SLC Translated Lead Detail Layout        |
| <a href="#">SLC Translated Opportunity Detail</a> | Read | 17 | Tab Hidden | SLC Translated Opportunity Detail Layout |

16) Select Object Settings from drop down, you will get list of all objects. Scroll down you will get installed package related all custom objects.



- 17) From dropdown select “SLC Translated KB Detail” within “Object Settings”, click on edit and enable the **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**

Profile Overview > Object Settings > SLC Translated KB Detail

SLC Translated KB Detail Edit

Tab Settings  
Tab Hidden

Record Types and Page Layout Assignments

| Record Type | Page Layout Assignment          | Assigned Record Types | Default Record Type |
|-------------|---------------------------------|-----------------------|---------------------|
| --Master--  | SLC Translated KB Detail Layout |                       |                     |

Object Permissions

| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input type="checkbox"/>            |
| Edit            | <input type="checkbox"/>            |

Field Permissions

| Field Name       | Read Access                         | Edit Access              |
|------------------|-------------------------------------|--------------------------|
| Active In        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document ID      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Name             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- 18) From dropdown select “SLC Language”, click on edit and enable the **Read Access** for **Object Permissions** and **Field Permissions** as shown below and click **save**

Profile Overview > Object Settings > SLC Language

SLC Language Edit

Tab Settings  
Tab Hidden

Record Types and Page Layout Assignments

| Record Type | Page Layout Assignment | Assigned Record Types | Default Record Type |
|-------------|------------------------|-----------------------|---------------------|
| --Master--  | SLC Language Layout    |                       |                     |

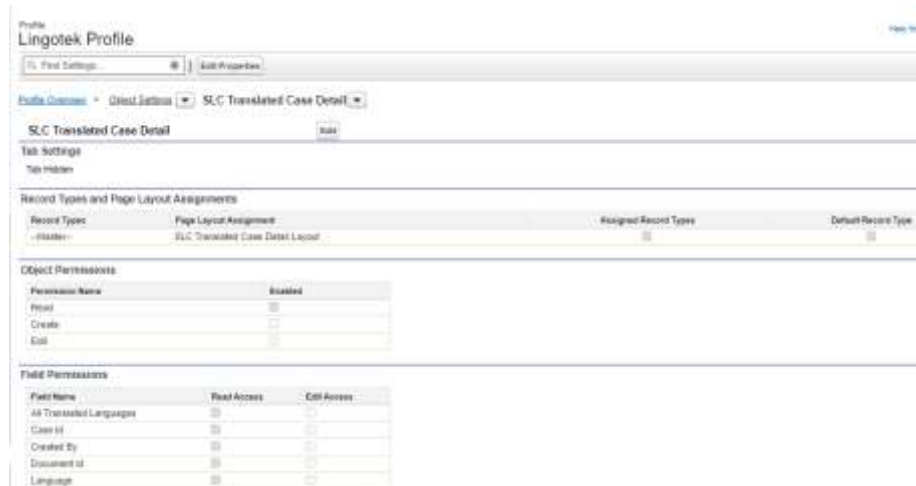
Object Permissions

| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input type="checkbox"/>            |
| Edit            | <input type="checkbox"/>            |

Field Permissions

| Field Name            | Read Access                         | Edit Access              |
|-----------------------|-------------------------------------|--------------------------|
| Created By            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language LocaleCode   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Name                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Salesforce LocaleCode | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- 19) Now select “SLC Translated Case Detail” within “Object Settings”, click on Edit and Enable **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**

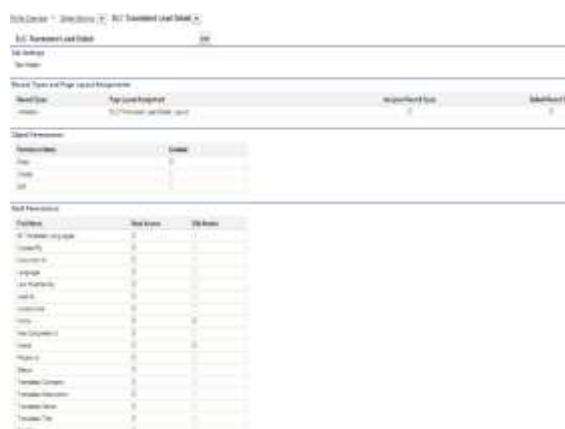


The screenshot shows the 'Lingotek Profile' settings page. The 'Object Settings' dropdown is set to 'SLC Translated Case Detail'. The 'Tab Settings' section shows 'Tab Hidden' is checked. The 'Record Types and Page Layout Assignments' table shows 'SLC Translated Case Detail Layout' assigned to the 'SLC Translated Case Detail' record type. The 'Object Permissions' table shows 'Read' access is enabled for the 'SLC Translated Case Detail' object. The 'Field Permissions' table shows 'Read Access' is enabled for the following fields: 'All Translated Languages', 'Case Id', 'Created By', 'Document Id', and 'Language'.

| Field Name               | Read Access                         | Edit Access              |
|--------------------------|-------------------------------------|--------------------------|
| All Translated Languages | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Case Id                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Id              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

|                        |                                     |                          |
|------------------------|-------------------------------------|--------------------------|
| Last Modified By       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| LocaleCode             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Name                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| New Document Id        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Project Id             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Status                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated Description | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated Subject     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Workflow               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

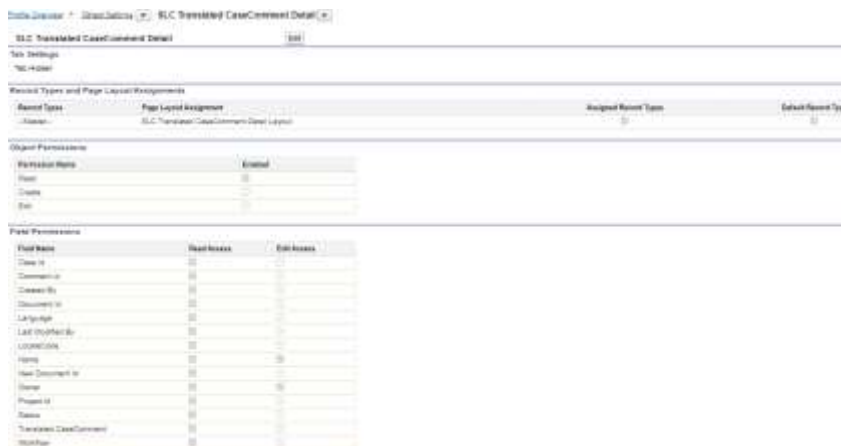
- 20) Now from dropdown select “SLC Translated Lead Detail” with in “Object Settings”, click on edit and enable the **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**



The screenshot shows the 'Lingotek Profile' settings page for 'SLC Translated Lead Detail'. The 'Object Settings' dropdown is set to 'SLC Translated Lead Detail'. The 'Tab Settings' section shows 'Tab Hidden' is checked. The 'Record Types and Page Layout Assignments' table shows 'SLC Translated Lead Detail Layout' assigned to the 'SLC Translated Lead Detail' record type. The 'Object Permissions' table shows 'Read' access is enabled for the 'SLC Translated Lead Detail' object. The 'Field Permissions' table shows 'Read Access' is enabled for the following fields: 'All Translated Languages', 'Case Id', 'Created By', 'Language', 'Lead Number', 'Lead Id', 'Lead Name', 'Lead Type', 'Lead Category', 'Lead Status', 'Lead Owner', 'Lead Created', 'Lead Modified', 'Lead Deleted', 'Lead Archived', 'Lead Deleted Date', 'Lead Deleted By', 'Lead Deleted Reason', 'Lead Deleted Status', 'Lead Deleted Type', and 'Lead Deleted Category'.

| Field Name               | Read Access                         | Edit Access              |
|--------------------------|-------------------------------------|--------------------------|
| All Translated Languages | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Case Id                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Number              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Id                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Name                | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Type                | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Category            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Status              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Owner               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Created             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Modified            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted Date        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted By          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted Reason      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted Status      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted Type        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lead Deleted Category    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- 21) From dropdown select “SLC Translated Case Comment Detail” within “Object Settings”, click on edit and enable the **Read** access for **Object Permissions** and **FieldPermissions** as shown below and click **save**

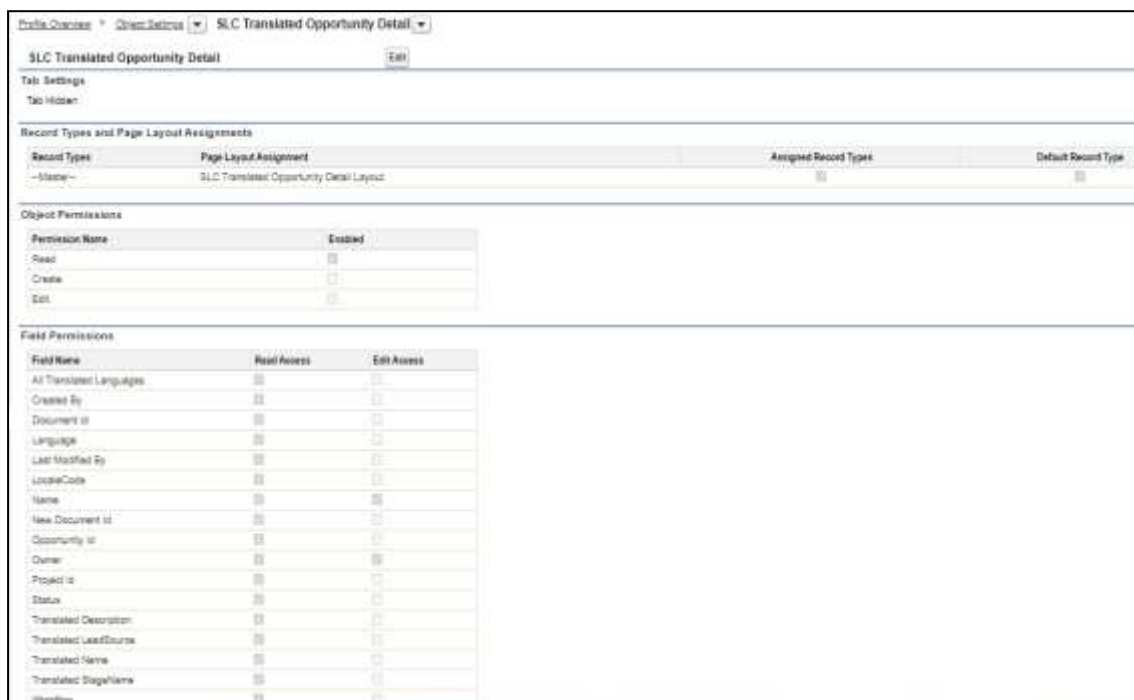


The screenshot shows the configuration page for "SLC Translated CaseComment Detail". The "Object Permissions" section is expanded, showing a table with columns "Permission Name" and "Enabled". The "Read" permission is checked. The "Field Permissions" section is also expanded, showing a table with columns "Field Name", "Read Access", and "Edit Access". The "Read Access" column is checked for all fields.

| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input type="checkbox"/>            |
| Edit            | <input type="checkbox"/>            |

| Field Name             | Read Access                         | Edit Access              |
|------------------------|-------------------------------------|--------------------------|
| Case Id                | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Id            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| LocationCode           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Name                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| New Document Id        | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Project Id             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Status                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated CaseComment | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Workflow               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- 22) From dropdown select “SLC Translated Opportunity Detail”, click on edit and enable the **Read** access for **Object Permissions** and **Field Permissions** as shown below and click **save**



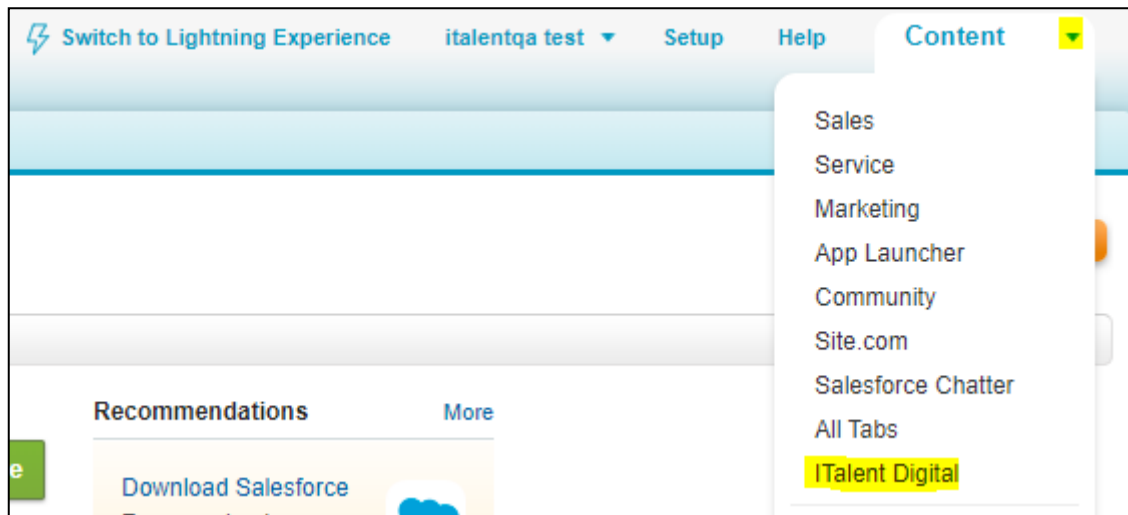
The screenshot shows the configuration page for "SLC Translated Opportunity Detail". The "Object Permissions" section is expanded, showing a table with columns "Permission Name" and "Enabled". The "Read" permission is checked. The "Field Permissions" section is also expanded, showing a table with columns "Field Name", "Read Access", and "Edit Access". The "Read Access" column is checked for all fields.

| Permission Name | Enabled                             |
|-----------------|-------------------------------------|
| Read            | <input checked="" type="checkbox"/> |
| Create          | <input type="checkbox"/>            |
| Edit            | <input type="checkbox"/>            |

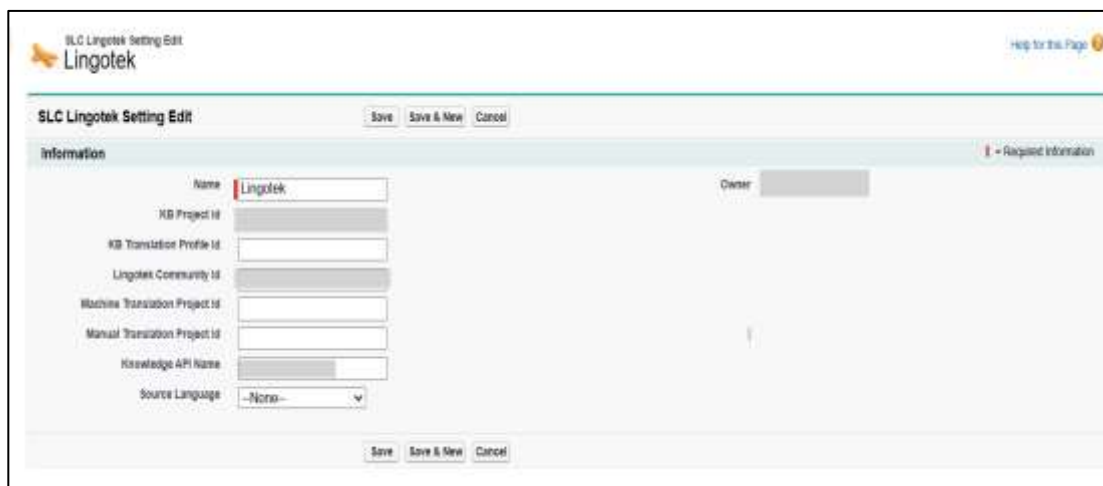
| Field Name               | Read Access                         | Edit Access              |
|--------------------------|-------------------------------------|--------------------------|
| All Translated Languages | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Created By               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Id              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Language                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Last Modified By         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| LocationCode             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Name                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| New Document Id          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Opportunity Id           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Owner                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Project Id               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Status                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated Description   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated LeadSource    | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated Name          | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Translated StageName     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Workflow                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

## Configure SLC Lingotek Setting Object

- 1) Open **iTalent Digital** App from left top corner drop down and Click on **SLC Lingotek Setting** Tab

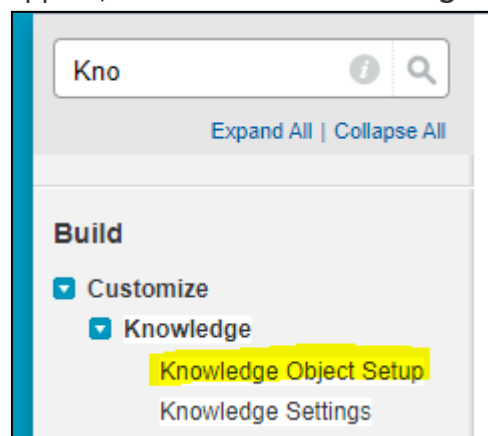


- 2) Then select **SLC Lingotek setting** on the options bar.
- 3) Click on New



- 4) Create New record with name like Lingotek.

- 5) Now at **KB Project Id** give project id of Lingotek TMS which you are going to use for Knowledge Articles Translation ([Refer Point 2 in Lingotek Setup Document to get Project Id](#))
- 6) Now at **KB Translation Profile Id** give Translation profile ID of Lingotek TMS which you have created and are going to use for Knowledge Articles Translation ([Refer Point 2 in Lingotek Setup Document to get Translation Profile Id](#))
- 7) To get **Knowledge API Name**, on the left side panel, select **Customize** which will expand into a dropdown menu, and then select **Knowledge** (underneath *Requests*) from this menu. Another dropdown menu will appear, and then select **Knowledge Object Setup** from this menu.



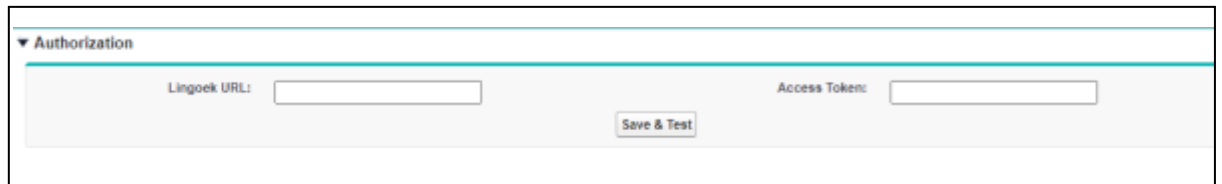
- 8) Copy the API Name,



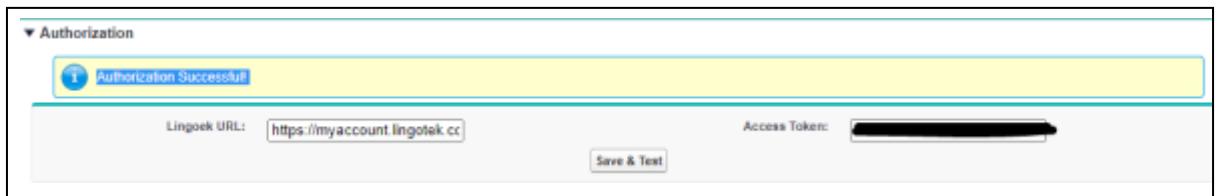
- 9) Add **Machine Translation Project Id**, it is a project id with workflow Machine Translation which will use for Case, Lead And Opportunity Translation ([Refer Point 2 in Lingotek Setup Document to get Project Id](#))
- 10) Add **Manual Translation Project Id**, It is a project id with workflow Manual Translation which will use for Case, Lead And Opportunity Translation ([Refer Point 2 in Lingotek Setup Document to get Project Id](#))
- 11) Click **Save**

12) Once You save it. Please Provide values in InputText. (i.e Lingotek URL and Lingotek Access Token).Click on Save & Test.

**Note:** To get the **Lingotek Access Token** ([Refer Point 1 in Lingotek Setup Document](#))



13) Once your authorization completed you will see message like Authorization

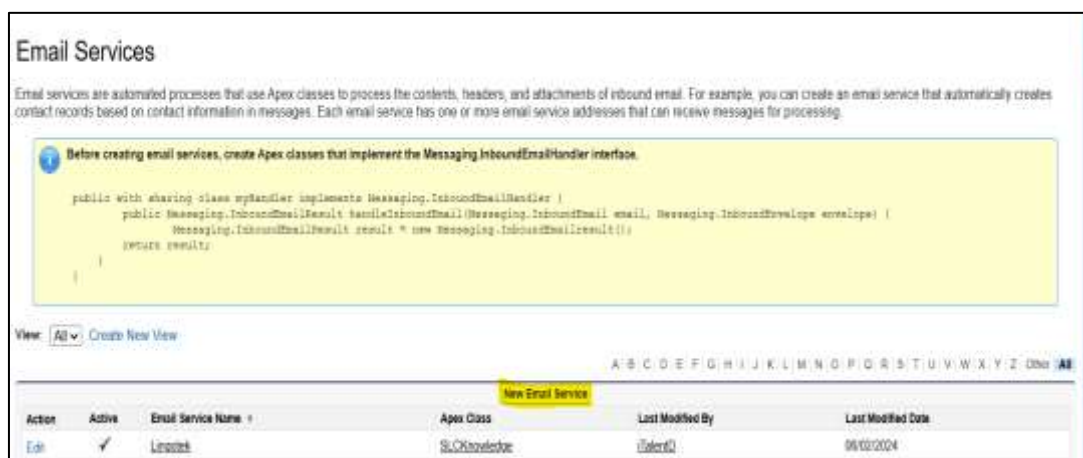


Successful.

## Configure Email Service

Next, you will need to set up an internal Email Service within Salesforce. This is needed for the translation plugin to work:

- 1) **Setup → Build → Develop → Emailservices**
- 2) Click on **“New Email Service”**



```

public with sharing class myHandler implements Messaging.InboundEmailHandler {
    public Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email, Messaging.InboundEnvelope envelope) {
        Messaging.InboundEmailResult result = new Messaging.InboundEmailResult();
        return result;
    }
}

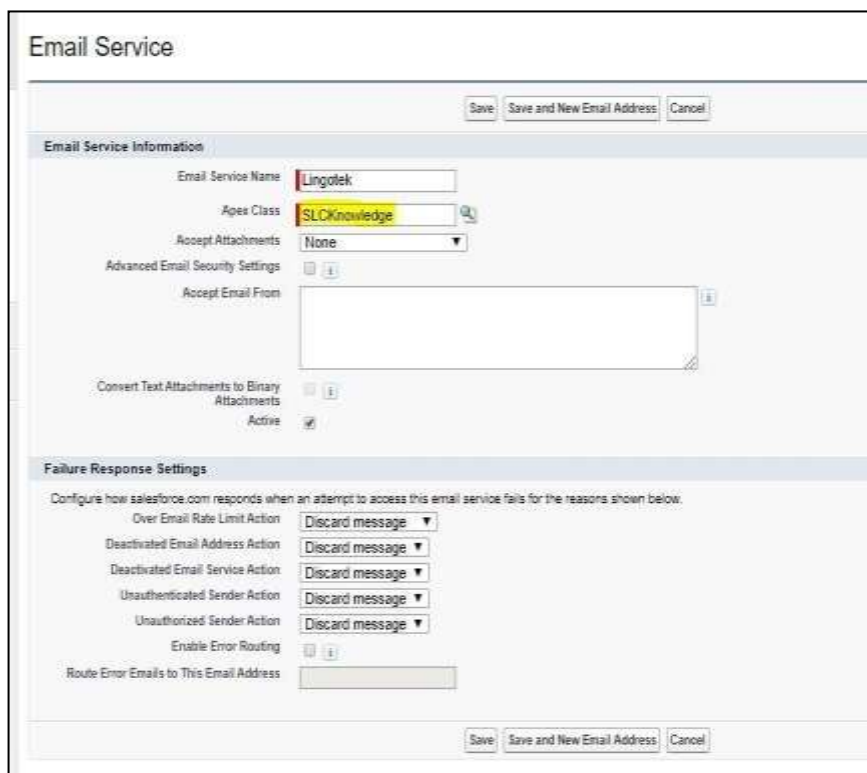
```

- 3) Now you will see a screen where you can configure your **Email Service Information**. The information on this page will allow Lingotek and Salesforce to communicate with one another. Complete the fields as shown.

- Under **Email Services Name**, enter "Lingotek"
- Under **Apex Alert**, search for and select "SLCKnowledge"

*Click the search icon, type " SLCKnowledge " and Click Go. From the search results, click to select SLCKnowledge.*

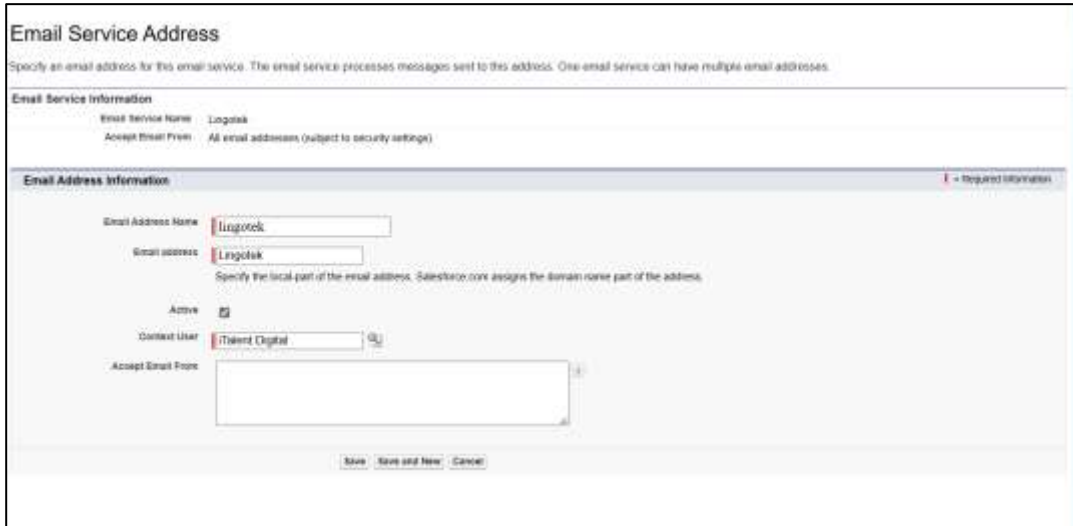
- At the end of the list, check **Active**.



- 4) Under **Failure Response Settings**, complete the following fields.
- Next to **Over Email Rate Limit Action**, scroll to select "Requeue message."
  - At the end of the list, check **Enable Error Routing**.
  - Under **Route Error Emails to This Email Address**, enter support email of your domain.
  - Click **Save and New Email Address**.
- 5) This should open to the **Email Address Information** page.

*On the Email Address Information page, be sure to add a Context User.*

*The Context User is a placeholder profile that allows Lingotek to communicate with*



*Salesforce. Complete the fields as shown:*

- a. In the **Email Address** field, type "lingotek."

**Note** - Salesforce will use this text ("lingotek") to generate a system email address.

*This email address helps Lingotek communicate - behind the scenes - with Salesforce.*

- b. Check **Active**.

By default, Salesforce adds you as the **Context User**. To designate someone as the **Context User**, click the search icon and select the new user. Select the context user as Lingotek User (which you have created).

**Note:** We shouldn't specify anything in "**Accept Email From**".

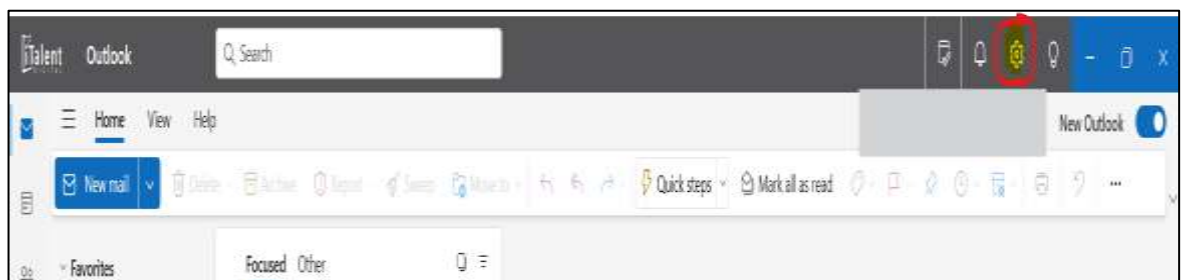
- c. Click **Save**.

- 6) Copy the Email address, this will be used for redirecting purpose.

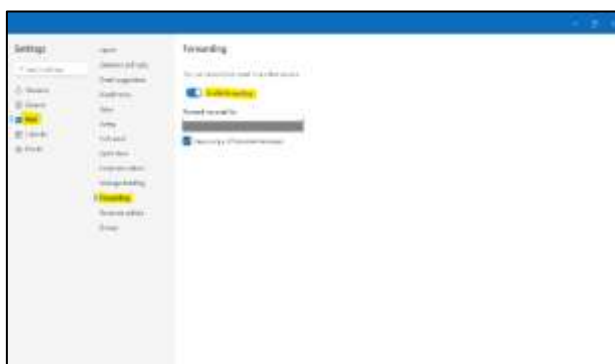


Add Forwarding Email Address to your yourdomain.com email alias in outlook.

- Login to the outlook using your italentdigital.com email.
- Click on settings.



- Click on “Mail” and go to Forwarding tab click on “enable forwarding” and paste the email address that is copied in the previous step, ***you must make sure the “Keep a copy of forwarded message” checkbox is always ticked.***

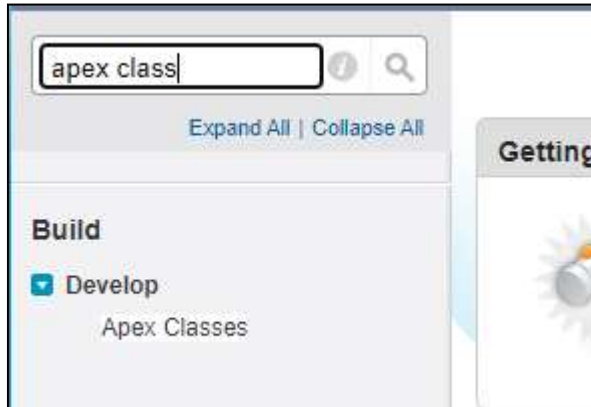


- Click **Save**.

OR

## Add Forwarding Mail to Your Gmail

- 1) Create apex class from Setup > Build > Develop > Apex Class



- 2) Click New and add apex class mentioned below (At \* add your Gmail ID) and save it.

```
/*  
  
This file is generated and isn't the actual source code for this  
managed global class.  
  
This read-only file shows the class's global constructors,
```

To enable code to compile, all methods return null.

```
*/  
  
global class SLCKnowledgeMail implements Messaging.InboundEmailHandler {  
  
    global Messaging.InboundEmailResult handleInboundEmail(Messaging.InboundEmail email,  
  
    Messaging.InboundEnvelope envelope) {  
  
  
  
  
  
  
  
        Messaging.SingleEmailMessage semail = new Messaging.SingleEmailMessage();  
        String[] sendingTo = new String[]{'  
  
        semail.setToAddresses(sendingTo);  
        semail.setSubject('Verification!');  
        semail.setPlainTextBody(email.subject);  
  
        Messaging.sendEmail(new Messaging.SingleEmailMessage[] {semail});  
    }  
}
```

- 3) Now go to Setup > Build > Develop > Email Services
- 4) Click Edit **Lingotek** ( Your Email Service Name). Make sure it is **Active**.
- 5) Add mentioned above apex class **SLCKnowledgeMail** to your Email Service and save it.
- 6) On your computer, open **Gmail** using the account you want to **forward** messages from.
- 7) In the top right, click **Settings**.
- 8) Click the **Forwarding** and POP/IMAP tab.
- 9) In the "**Forwarding**" section, click Add a **forwarding** address.
- 10) Enter the email address you want to **forward** messages to.
- 11) Click Next Proceed and then click on **resend email**.
- 12) You will get verification code in your Gmail
- 13) Add verification code to verify your Forwarding Mail
- 14) Once Verification done.

15) Make sure to select/enable **radio button** for your just now added forwarding mail and click on **save changes** for Gmail Setting. it means now your forwarding mail is added to your Gmail.

16) Now Go back to Salesforce Email Service and change the apex class to **SLCKnowledge**

17) Save it.

## Specifying Callback URL

- Add the Callback URL in your Lingotek Project ([Refer Point 3 in Lingotek Setup Document](#))

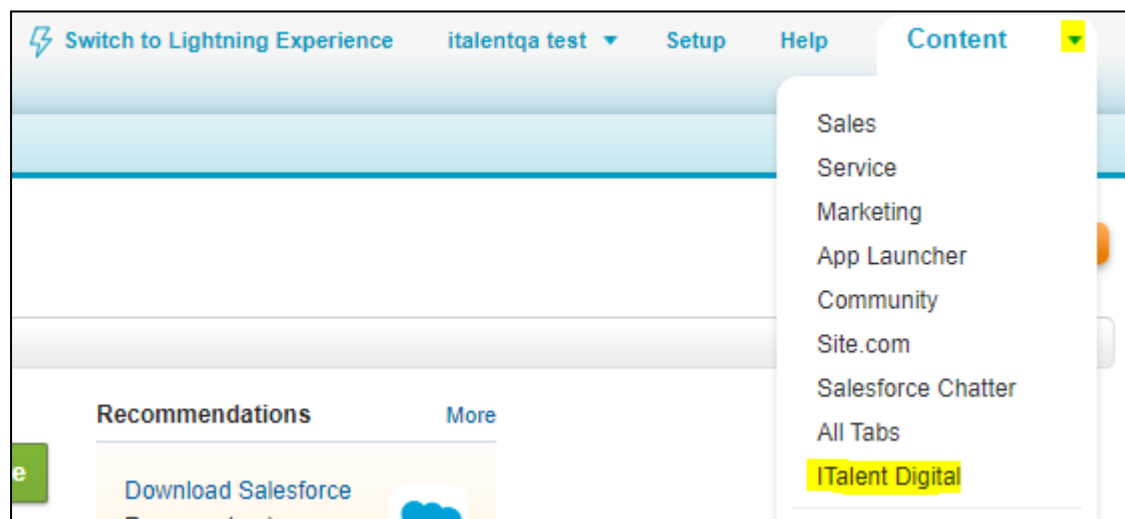
## Specifying Filter for project in Lingotek

- Add Filter for your lingotek project ([Refer Point 4 in Lingotek Setup Document](#))

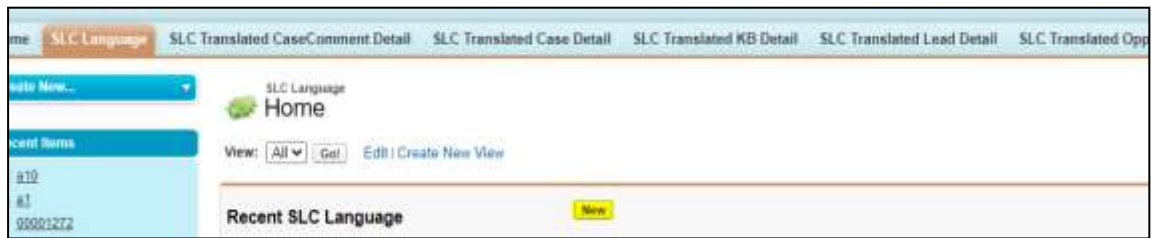
## Configure Language Settings

1) Open **iTalent Digital** App from left top corner drop down and Click on **SLCLanguage**

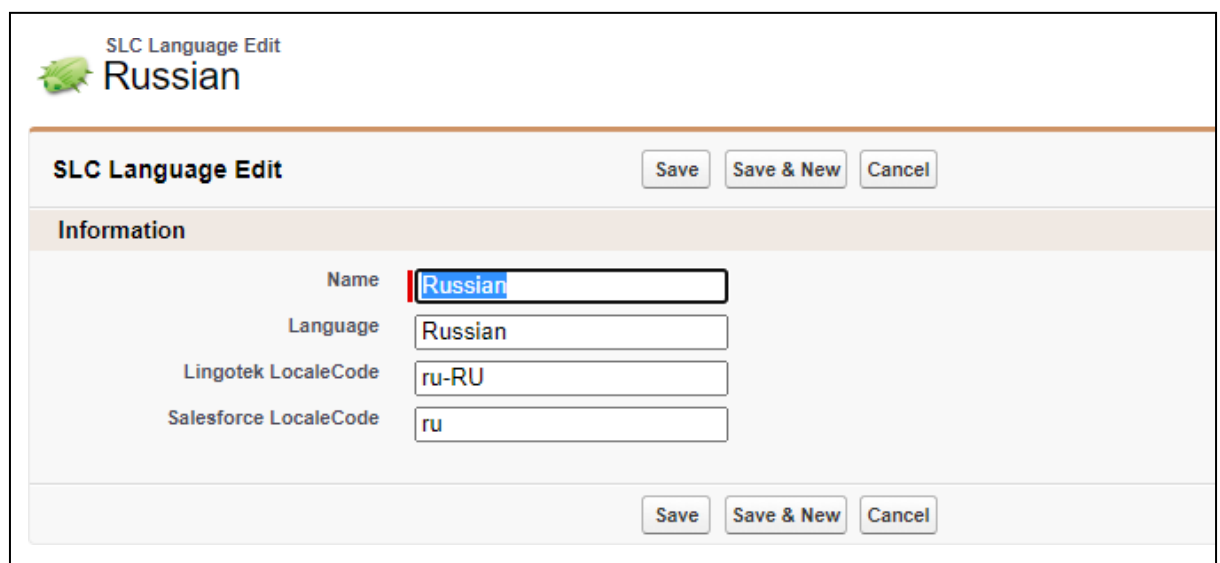
Tab



- 2) Then select **SLC Language** on the options bar.



- 3) Click on New
- 4) Add Languages for which you want to perform translation for Articles, Lead, Case and Opportunity



**SLC Language Edit**

Buttons: Save, Save & New, Cancel

**Information**

|                       |                                      |
|-----------------------|--------------------------------------|
| Name                  | <input type="text" value="Russian"/> |
| Language              | <input type="text" value="Russian"/> |
| Lingotek LocaleCode   | <input type="text" value="ru-RU"/>   |
| Salesforce LocaleCode | <input type="text" value="ru"/>      |

Buttons: Save, Save & New, Cancel

- 5) Give the Name and Language same.
- 6) At Lingoek LocaleCode give Language Code which supporting in Lingotek for that particular language

**Refer link:** <https://support.lingotek.com/hc/en-us/articles/115003439192-Supported-Languages-Locales>

**Note:** For Example Language Dutch Language code in lingotek is **ru-RU**

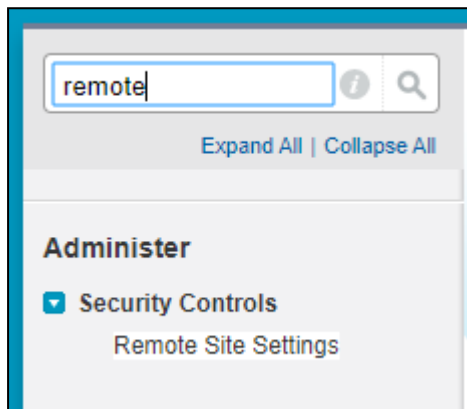
- 7) At Salesforce LocaleCode give language code which is supporting in salesforce for that particular Language

**Refer link:** [https://help.salesforce.com/articleView?id=faq\\_getstart\\_what\\_languages\\_does.htm&type=5](https://help.salesforce.com/articleView?id=faq_getstart_what_languages_does.htm&type=5)

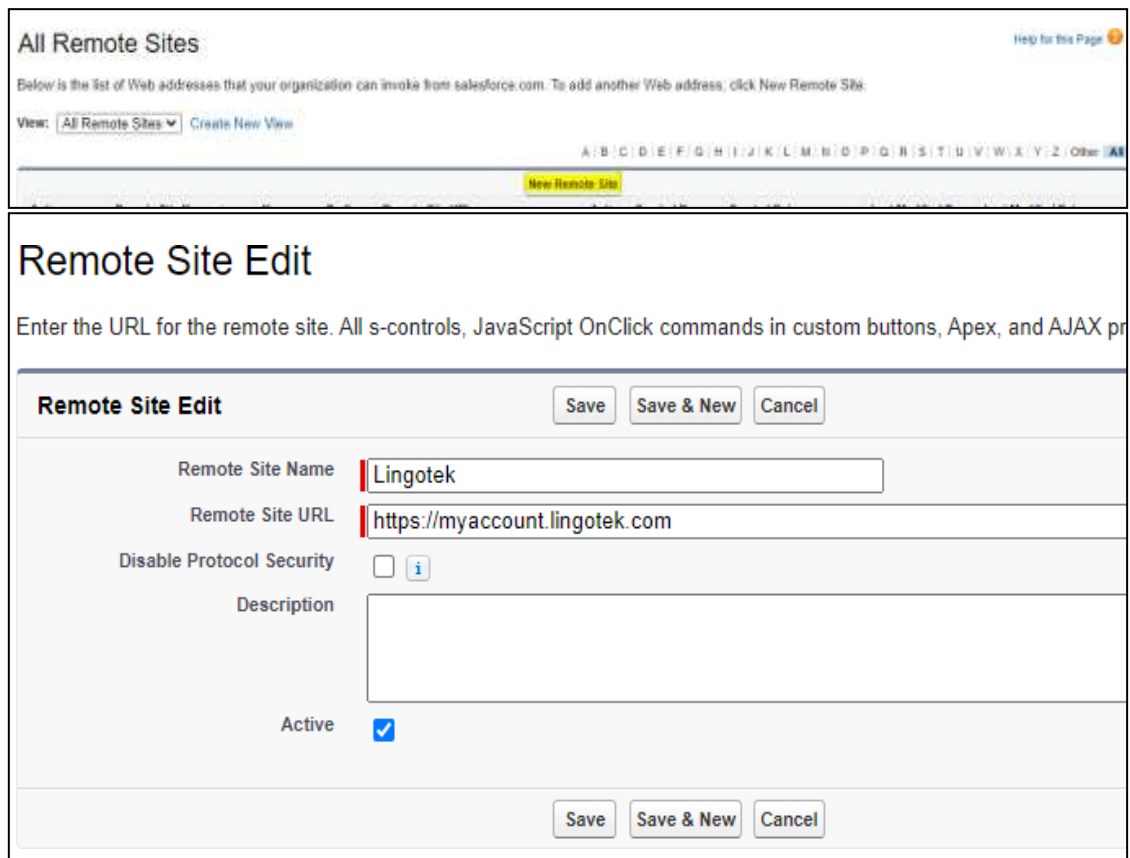
**Note:** For Example, Language Dutch Language code in Salesforce is **ru**

## Configure Remote Site Setting

- 1) Create Remote site Settings



- 2) Create remote site settings for Lingotek URL and Salesforce URL (Your Salesforce instance URL)



The screenshot displays two parts of the Salesforce interface. The top part shows the "All Remote Sites" page, which includes a "New Remote Site" button. The bottom part shows the "Remote Site Edit" form, which is used to configure a remote site. The form contains the following fields and controls:

- Remote Site Name:** A text field containing "Lingotek".
- Remote Site URL:** A text field containing "https://myaccount.lingotek.com".
- Disable Protocol Security:** A checkbox that is currently unchecked, with an information icon (i) next to it.
- Description:** A large text area for providing additional details about the remote site.
- Active:** A checkbox that is currently checked.

At the top of the form, there are buttons for "Save", "Save & New", and "Cancel". At the bottom of the form, there are also buttons for "Save", "Save & New", and "Cancel".

**All Remote Sites**

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| Action                                   | Remote Site Name | Namespace Prefix | Remote Site URL                | Active | Created By      | Created Date        | Last Modified By | Last Modified Date  |
|------------------------------------------|------------------|------------------|--------------------------------|--------|-----------------|---------------------|------------------|---------------------|
| <a href="#">Edit</a> <a href="#">Del</a> | Lincodek         | -                | https://myaccount.lincodek.com | ✓      | Digital iTalent | 22/01/2024, 3:19 pm | Digital iTalent  | 22/01/2024, 3:24 pm |
| <a href="#">Edit</a> <a href="#">Del</a> | Salesforce       | -                |                                | ✓      | Digital iTalent | 22/01/2024, 3:23 pm | Digital iTalent  | 22/01/2024, 3:23 pm |

**Remote Site Edit**

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit

Save Save & New Cancel

Remote Site Name Salesforce

Remote Site URL

Disable Protocol Security ☐

Description

Active ☒

Save Save & New Cancel

## Named Credential Setup

Following are the steps to connect to an external system using “Named Credential”:

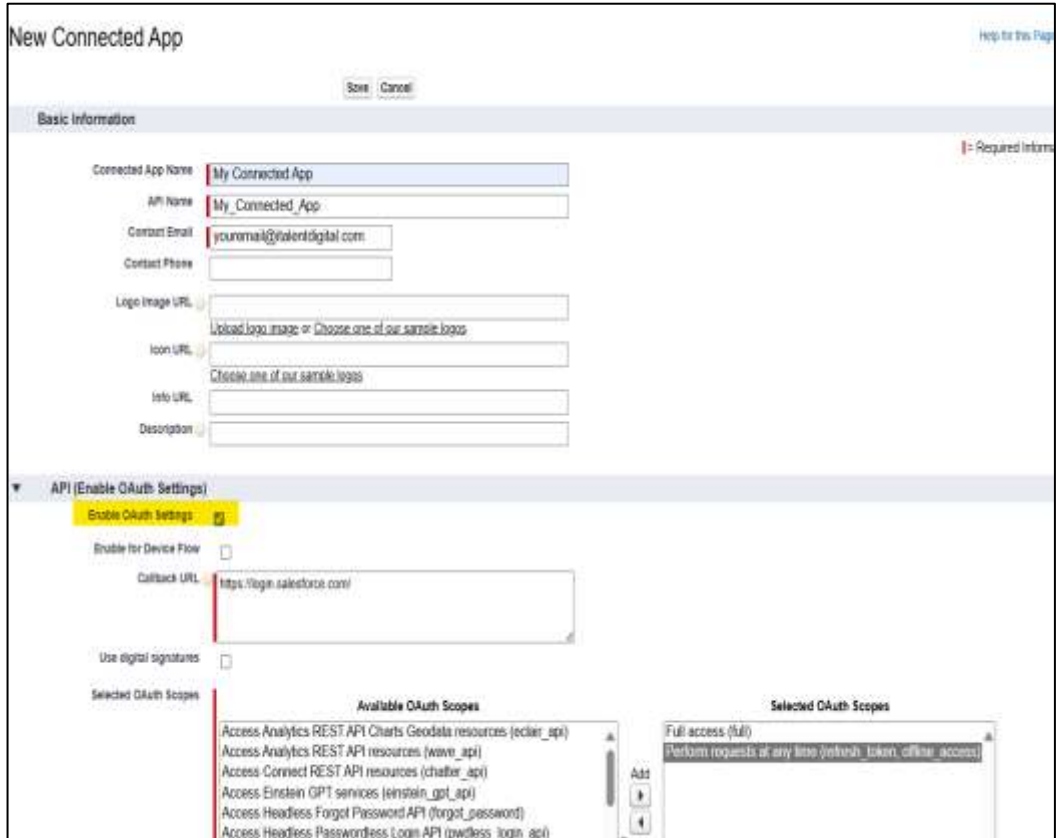
- 1) Create Connected App
- 2) Create Authorization Provider
- 3) Define Named Credential
- 4) Use Apex to connect in 5 lines of code.

### 1) Create Connected App:

- a) Navigate to “Setup | Build | Create | Apps | Connected Apps” and click on New
- b) Provide all necessary information.
- c) In “Callback URL” enter the temporary Salesforce URL. We will come back again on this step later to provide Callback URL
- d) Check “Enable OAuth Settings” checkbox to use OAuth

- e) Select the scope
- f) Save
- g) “Consumer Key” and “Consumer Secret” will be provided once you save this.

We need this information on the next step.



**New Connected App**

Save Cancel

**Basic Information**

Connected App Name: My Connected App

API Name: My\_Connected\_App

Contact Email: yourname@valentdigital.com

Contact Phone:

Logo Image URL: Upload logo image or Choose one of our sample logos

Icon URL: Choose one of our sample logos

Info URL:

Description:

**API (Enable OAuth Settings)**

Enable OAuth Settings: ☒

Enable for Device Flow: ☐

Callback URL: https://login.salesforce.com/

Use digital signatures: ☐

**Selected OAuth Scopes**

**Available OAuth Scopes**

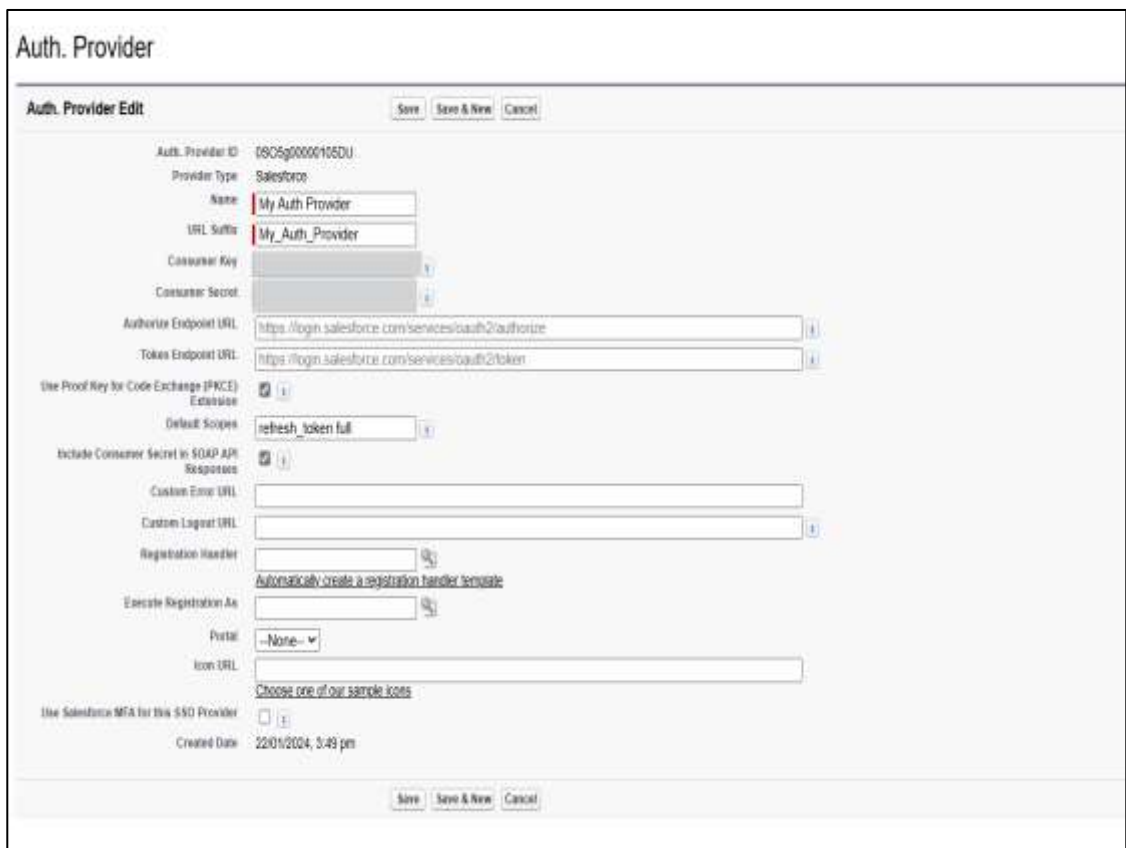
- Access Analytics REST API Charts Geodata resources (eclair\_api)
- Access Analytics REST API resources (wave\_api)
- Access Connect REST API resources (chatter\_api)
- Access Einstein GPT services (einstein\_gpt\_api)
- Access Headless Forgot Password API (forgot\_password)
- Access Headless Passwordless Login API (pwdless\_login\_api)

**Selected OAuth Scopes**

- Full access (full)

## 2) Create Authorization Provider:

- Navigate to “Setup | Administer | Security Controls | Auth. Providers | Create New”.
- Select “Salesforce” as Provider Type
- Provide “Consumer Key” and “Consumer Secret” from the previous step
- In “Default Scope” enter the value as “refresh\_token full”. “refresh\_token” and “full” should be separated by space
- Finally, Save
- Once you save, it will provide you the set of URLs in “Salesforce Configuration” section on the same page. Copy “Callback URL” and edit Connected App we created in the previous step and set this URL as Callback URL.



**Auth. Provider**

**Auth. Provider Edit** Save Save & New Cancel

Auth. Provider ID: t805g00000105DU

Provider Type: Salesforce

Name: My Auth Provider

URL Suffix: My\_Auth\_Provider

Consumer Key: [Masked]

Consumer Secret: [Masked]

Authorize Endpoint URL: https://login.salesforce.com/services/oauth2/authorize

Token Endpoint URL: https://login.salesforce.com/services/oauth2/token

Use Proof Key for Code Exchange (PKCE): ☒

Default Scopes: refresh\_token full

Include Consumer Secret in SOAP API Responses: ☒

Custom Error URL: [Empty]

Custom Logout URL: [Empty]

Registration Handler: [Empty]

Execute Registration As: Automatically create a registration handler template

Portal: --None--

Icon URL: Choose one of our sample icons

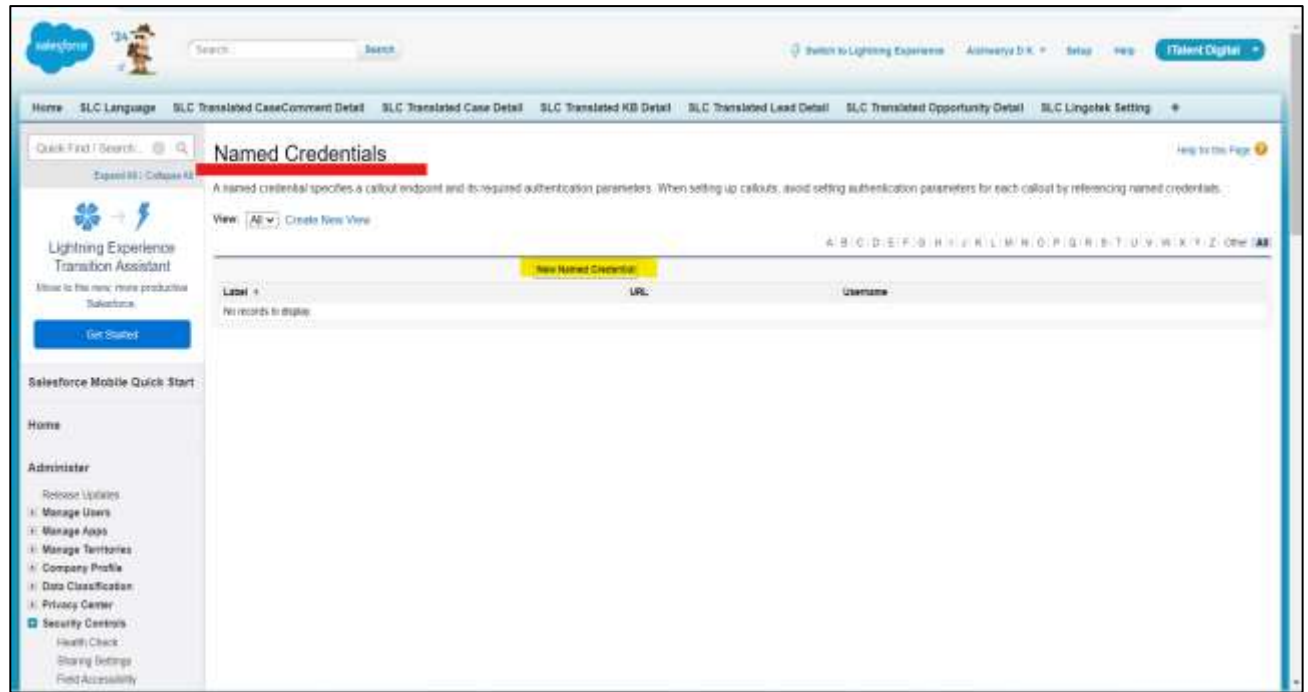
Use Salesforce MFA for this SSO Provider: ☐

Created Date: 22/01/2024, 3:49 pm

Save Save & New Cancel

### 3) Define Named Credentials:

- a) Navigate to “Setup | Administer | Security Controls | Named Credentials | New

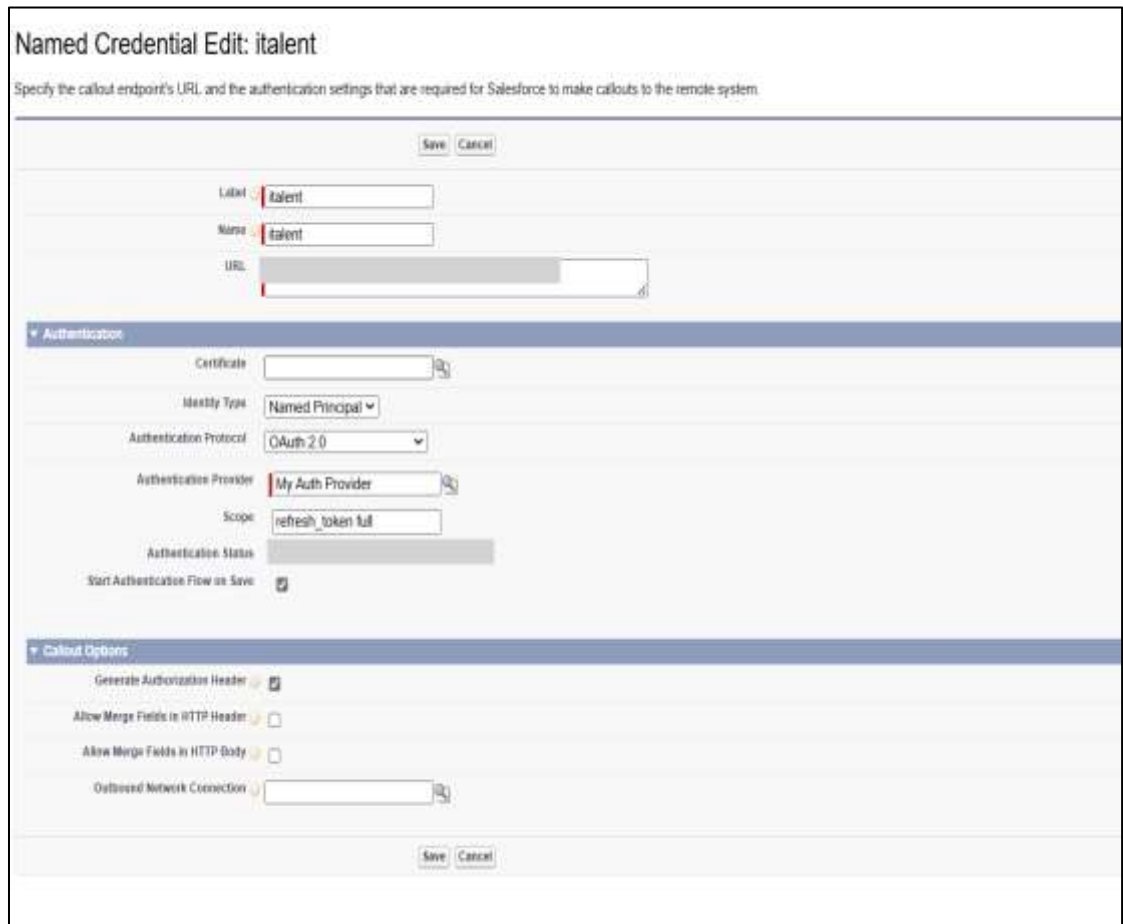


Named Credential “.

Provide the name (label) as **italent**

- b) In URL, provide URL of Salesforce instance where we want to Connect.
- c) Select “Named Principal” as Identity Type
- d) In our example select “Authentication Protocol” as OAuth 2.0
- e) Select the “Auth Provider” created in the previous step
- f) In scope, enter the value as “refresh\_token full”
- g) Check “Start Authentication Flow on Save” (this is important)
- h) Save

- i) After clicking on “Save” a new page will open to authenticate Salesforce Org using OAuth2 connected App. Log in using the credentials of the Salesforce instance that you want to connect to. If authentication is a success, you can see



**Named Credential Edit: italent**

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label: italent

Name: italent

URL: [Redacted]

**Authentication**

Certificate: [Redacted]

Identity Type: Named Principal

Authentication Protocol: OAuth 2.0

Authentication Provider: My Auth Provider

Scope: refresh\_token full

Authentication Status: [Redacted]

Start Authentication Flow on Save: ☒

**Callout Options**

Generate Authorization Header: ☒

Allow Merge Fields in HTTP Header: ☐

Allow Merge Fields in HTTP Body: ☐

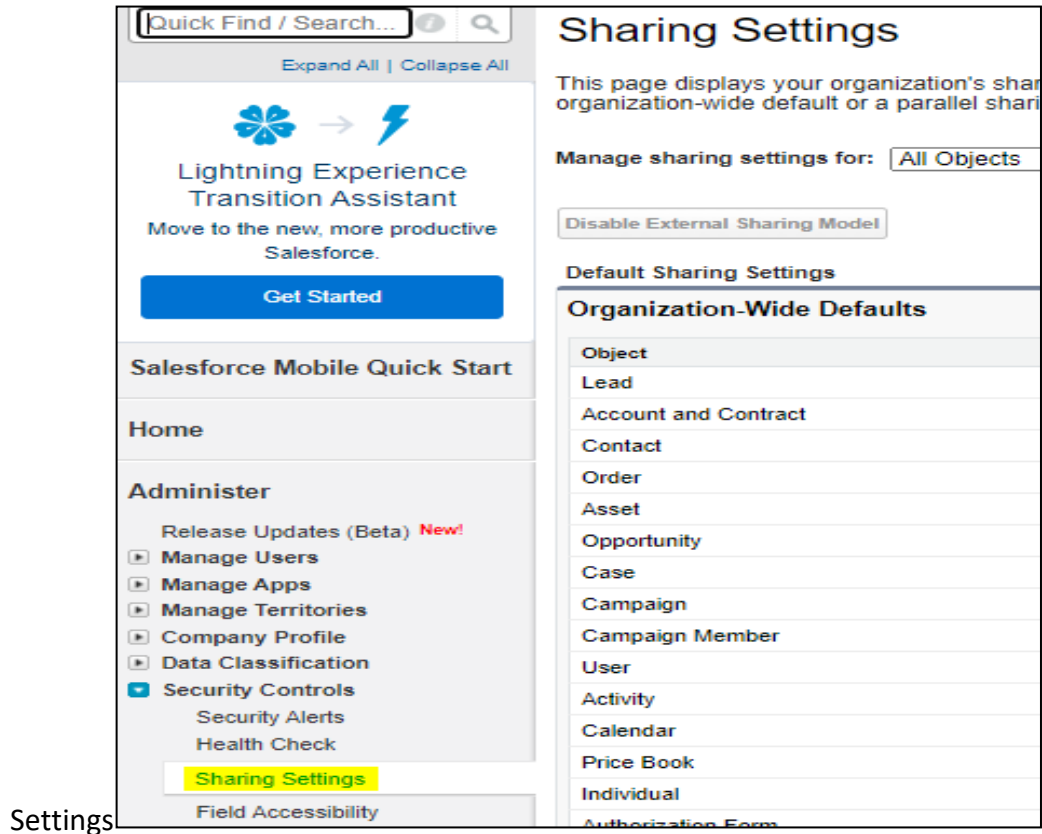
Outbound Network Connection: [Redacted]

Save Cancel

a message like “Authenticated as “.

## Add Sharing Settings

- 1) Navigate to “Setup | Administer | Security Control | Sharing



**NOTE:** Every time we configure sharing settings below for any object and click on save a pop up appears saying an email will be sent upon completion of these configurations click on “OK”

- 2) Create Sharing Rule for SLC Translated KB Detail

Click New, give label, select Rule Type Guest user access, based on criteria, select field Document Id and share with Lingotek Site Guest User, save it.

### Note:

- a) For Field **Document Id** give value **Starts With**  
**0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
- b) Select Rule Type > **Guest User access, based on criteria**
- c) Select the users to share with > **Lingotek Site Guest User**
- d) Select Access Level > **Read Only**

## →To get the site guest username

Navigate to Site | Select Site | Public Access Settings | Assigned Users

**SLC Translated KB Detail Sharing Rules**

New
Recalculate

Setup

### SLC Translated KB Detail Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name**

Label

Rule Name

i

Description

**Step 2: Select your rule type**

Rule Type

☐ Based on record owner
 ☐ Based on criteria
 ☒ Guest user access, based on criteria

**Step 3: Select which records to be shared**

By modifying the default settings in accordance with these criteria, you are allowing imm access to guest users without login credentials. To secure your community for guest use for the sensitivity of your data. Salesforce is not responsible for any exposure of your dat

| Criteria | Field                                    | Operator                                 | Value                                                    |     |
|----------|------------------------------------------|------------------------------------------|----------------------------------------------------------|-----|
|          | <input type="text" value="Document Id"/> | <input type="text" value="starts with"/> | <input type="text" value="0,1,2,3,4,5,6,7,8,9,a,b,c,d"/> | AND |
|          | <input type="text" value="--None--"/>    | <input type="text" value="--None--"/>    | <input type="text"/>                                     | AND |
|          | <input type="text" value="--None--"/>    | <input type="text" value="--None--"/>    | <input type="text"/>                                     | AND |
|          | <input type="text" value="--None--"/>    | <input type="text" value="--None--"/>    | <input type="text"/>                                     | AND |
|          | <input type="text" value="--None--"/>    | <input type="text" value="--None--"/>    | <input type="text"/>                                     |     |

[Add Filter Logic...](#)

**Step 4: Select the users to share with**

Share with

**Step 5: Select the level of access for the users**

Access Level

Save
Cancel

### 3) Create Sharing Rules for SLC Translated Case Detail

Click New, give label, select Rule Type Guest user access, based on criteria, select field Document Id and share with Lingotek Site Guest User, save it.

### Note:

- For Field **Document Id** give value **Starts With**  
**0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
- Select Rule Type > **Guest User access, based on criteria**
- Select the users to share with > **Lingotek Site Guest User**
- Select Access Level > **Read Only**

### →To get the site guest username

Navigate to Site | Select Site | Public Access Settings | Assigned Users

**SLC Translated Case Detail Sharing Rules**
New
Recalculate

#### Select SLC Translated Case Detail Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Rules and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name**

Label:

Rule Name:

Description:

**Step 2: Select your rule type**

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

**Step 3: Select which records to be shared**

By modifying the default settings in accordance with these criteria, you are allowing immediate and un-  
access to guest users without login credentials. To ensure your community for guest users, consider all  
for the security of your data. Salesforce is not responsible for any exposure of your data to unauthorized

| Criteria                            | Field       | Operator    | Value                       | AND |
|-------------------------------------|-------------|-------------|-----------------------------|-----|
| <input checked="" type="checkbox"/> | Document Id | Starts with | 0,1,2,3,4,5,6,7,8,9,a,b,c,d | AND |
| <input type="checkbox"/>            | Name        | None        |                             | AND |
| <input type="checkbox"/>            | Name        | None        |                             | AND |
| <input type="checkbox"/>            | Name        | None        |                             | AND |
| <input type="checkbox"/>            | Name        | None        |                             | AND |

[Add Filter Logic...](#)

**Step 4: Select the users to share with**

Share with:

**Step 5: Select the level of access for the users**

Access Level:

### 4) Create Sharing Rule for SLC Translated Lead Detail

Click New, give label, select Rule Type Guest user access, based on criteria, select field Document Id and share with Lingotek Site Guest User, save it.

### Note:

- For Field **Document Id** give value **Starts With**  
**0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
- Select Rule Type > **Guest User access, based on criteria**

- c) Select the users to share with > **Lingotek Site Guest User**
- d) Select Access Level > **Read Only**

### →To get the site guest username

Navigate to Site | Select Site | Public Access Settings | Assigned Users

**SLC Translated Lead Detail Sharing Rules**

New
Recalculate

Setup

SLC Translated Lead Detail Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label

SLC Lead

Rule Name

SLC\_Lead

Description

Step 2: Select your rule type

Rule Type

☐ Based on record owner
 ☐ Based on criteria
 ☒ Guest user access, based on criteria

Step 3: Select which records to be shared



By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited access to access to guest users without login credentials. To secure your community for guest users, consider all the use cases and for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users related

| Criteria | Field       | Operator    | Value                       |     |
|----------|-------------|-------------|-----------------------------|-----|
|          | Document Id | starts with | 0,1,2,3,4,5,6,7,8,9,a,b,c,d | AND |
|          | --None--    | --None--    |                             | AND |
|          | --None--    | --None--    |                             | AND |
|          | --None--    | --None--    |                             | AND |
|          | --None--    | --None--    |                             |     |

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with

Lingotek Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only

Save

Cancel

## 5) Create Sharing Rule for SLC Translated Opportunity Detail

Click New, give label, select Rule Type Guest user access, based on criteria, select field Document Id and share with Lingotek Site Guest User, save it.

### Note:

- For Field **Document Id** give value **Starts With**  
**0,1,2,3,4,5,6,7,8,9,a,b,c,d,e,f,g,h,i,j,k,l,m,n,o,p,q,r,s,t,u,v,w,x,y,z**
- Select Rule Type > **Guest User access, based on criteria**
- Select the users to share with > **Lingotek Site Guest User**
- Select Access Level > **Read Only**

→To get the site guest username

Navigate to Site | Select Site | Public Access Settings | Assigned Users

**SLC Translated Opportunity Detail Sharing Rules**
New
Recalculate

## Add Translation Button and Translation Field for Case, Lead and Opportunity

### 1. Add Translation Button and Translation Field for Case

Detail

### SLC Translated Opportunity Detail Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

**Step 1: Rule Name:**

Label:

Rule Name:

Description:

**Step 2: Select your rule type:**

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

**Step 3: Select which records to be shared:**

By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited access to guest users without login credentials. To secure your community for guest users, consider all the data for the sensitivity of your data. Salesforce is not responsible for any disclosure of your data to unauthenticated users.

| Criteria | Field       | Operator    | Value             |     |
|----------|-------------|-------------|-------------------|-----|
|          | Document Id | starts with | 0123456789a b c d | AND |
|          | -None-      | -None-      |                   | AND |
|          | -None-      | -None-      |                   | AND |
|          | -None-      | -None-      |                   | AND |

[Add Filter Logic](#)

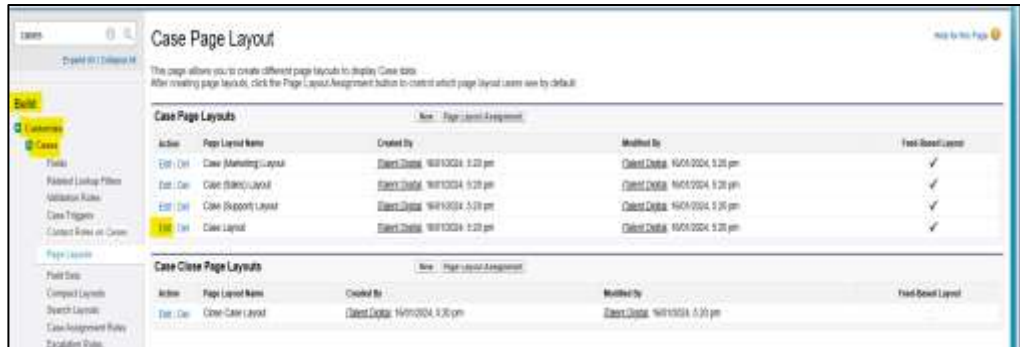
**Step 4: Select the users to share with:**

Share with:

**Step 5: Select the level of access for the users:**

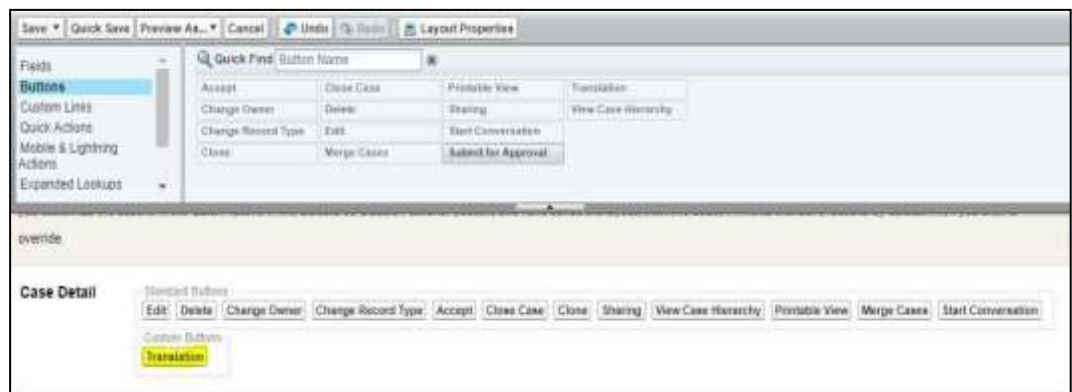
Access Level:

Save Cancel

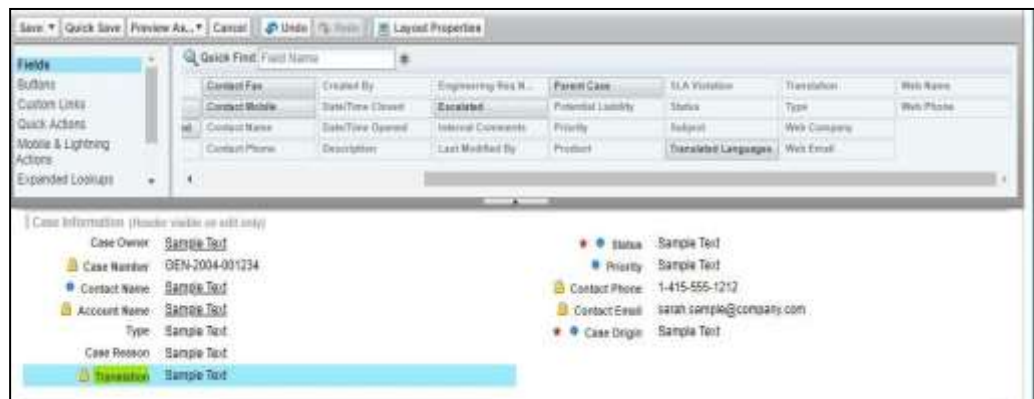


Navigate to Setup | Build | Customize | Cases | Page Layouts

- Edit **Case Layout**. From **Buttons** select **Translation** button and drag and drop within **Case Detail** Custom Buttons

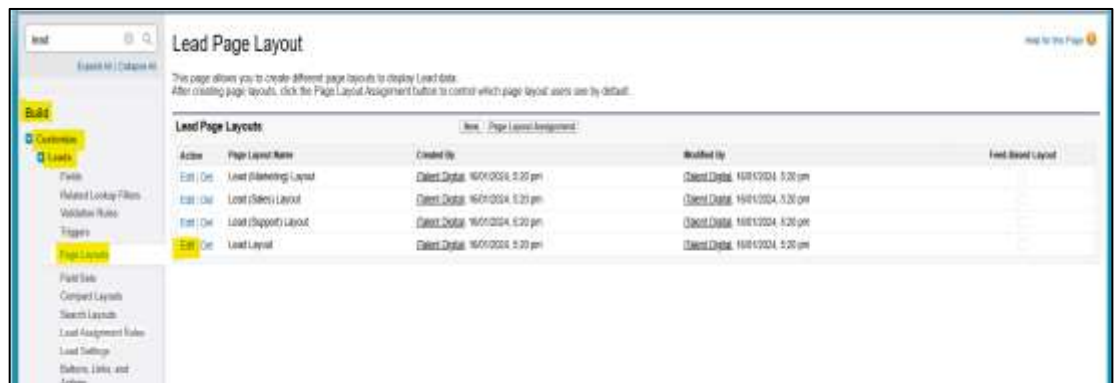


- Now from **Fields**, select **Translation** field and drag and drop it within Case Information

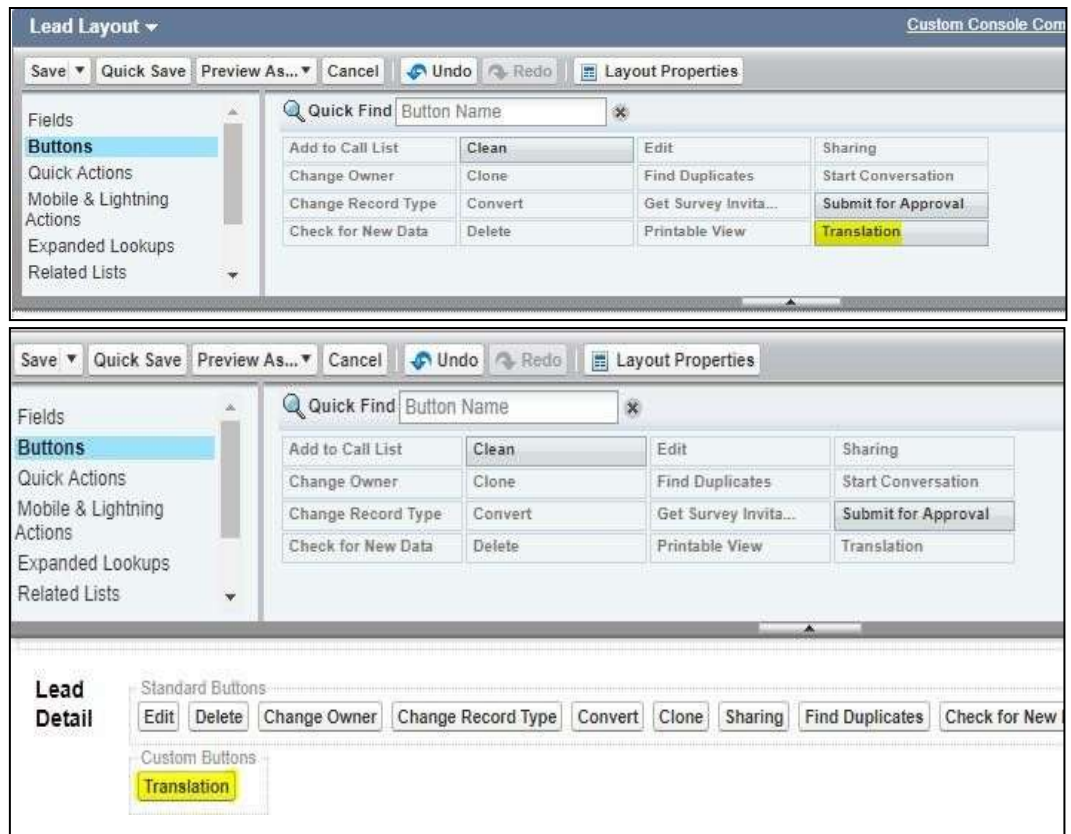


## 2. Add Translation Button and Translation Field for Lead

- Navigate to Setup | Build | Customize | Leads | Page Layouts



- Edit **Lead Layout**. From **Buttons** select **Translation** button and drag and drop within **Lead Detail** Custom Buttons



- Now from **Fields**, select **Translation** field and drag and drop it within Lead Information



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Quick Find Field Name

| Description    | Fax         | Last Modified By   | Lead S |
|----------------|-------------|--------------------|--------|
| i) Do Not Call | Fax Opt Out | Last Transfer Date | Mobile |
| Email          | Individual  | Lead Owner         | Name   |
| Email Opt Out  | Industry    | Lead Source        | No. of |

Custom Buttons

Translation

Lead Information (Header visible on edit only)

Lead Owner Sample Text

\* Name Sarah Sample

\* Company Sample Text

Title Sample Text

Lead Source Sample Text

Campaign Sample Text

Industry Sample Text

Annual Revenue \$123.45

Translation Sample Text

### 3. Add Translation Button and Translation Field for Opportunity

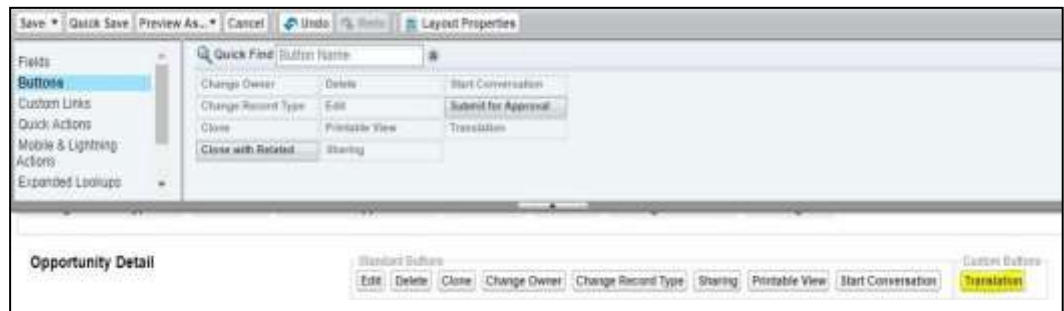
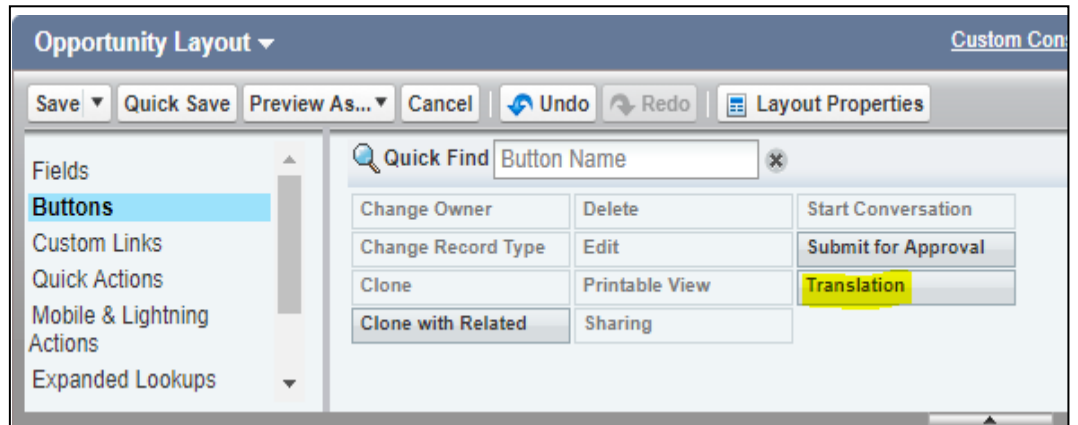
- Navigate to Setup | Build | Customize | Opportunities | Page Layouts

Opportunity Page Layout

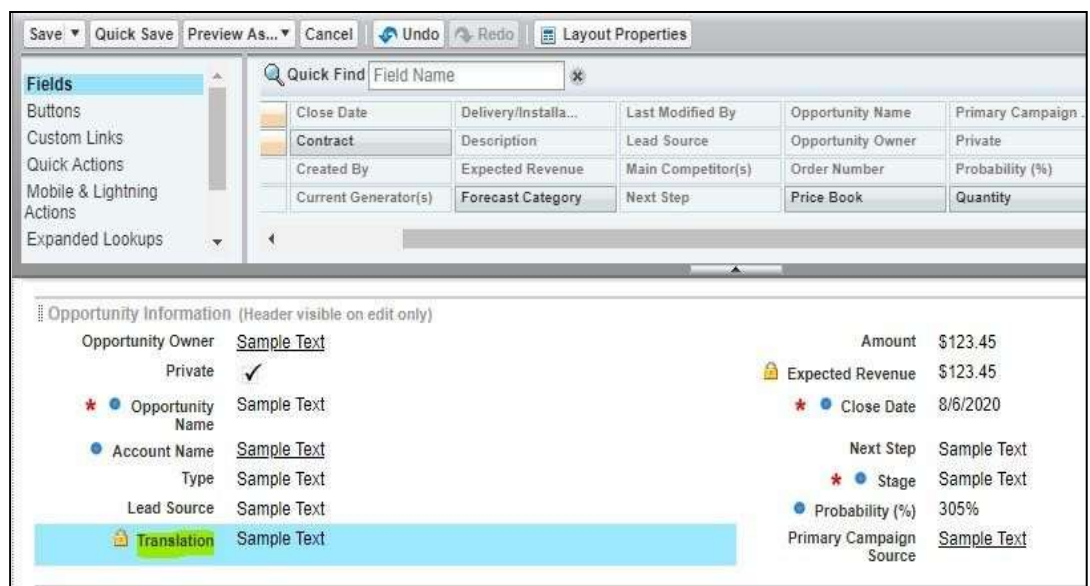
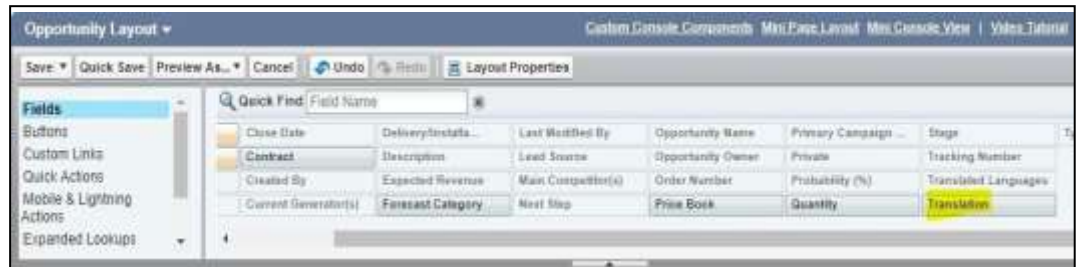
This page allows you to create different page layouts to display Opportunity data. After creating page layouts, click the Page Layout Assignment button to determine which page layout users see by default.

| Action | Page Layout Name             | Created By                        | Modified By                       | First Default Layout |
|--------|------------------------------|-----------------------------------|-----------------------------------|----------------------|
| Edit   | Opportunity Marketing Layout | Client Capital 16/01/2024 9:20 pm | Client Capital 16/01/2024 9:20 pm |                      |
| Edit   | Opportunity Shared Layout    | Client Capital 16/01/2024 9:20 pm | Client Capital 16/01/2024 9:20 pm |                      |
| Edit   | Opportunity Shared Layout    | Client Capital 16/01/2024 9:20 pm | Client Capital 16/01/2024 9:20 pm |                      |
| Edit   | Opportunity Layout           | Client Capital 16/01/2024 9:20 pm | Client Capital 16/01/2024 9:20 pm |                      |

- Edit **Opportunity Layout**. From **Buttons** select **Translation** button and drag and drop within **Opportunity Detail** Custom Buttons



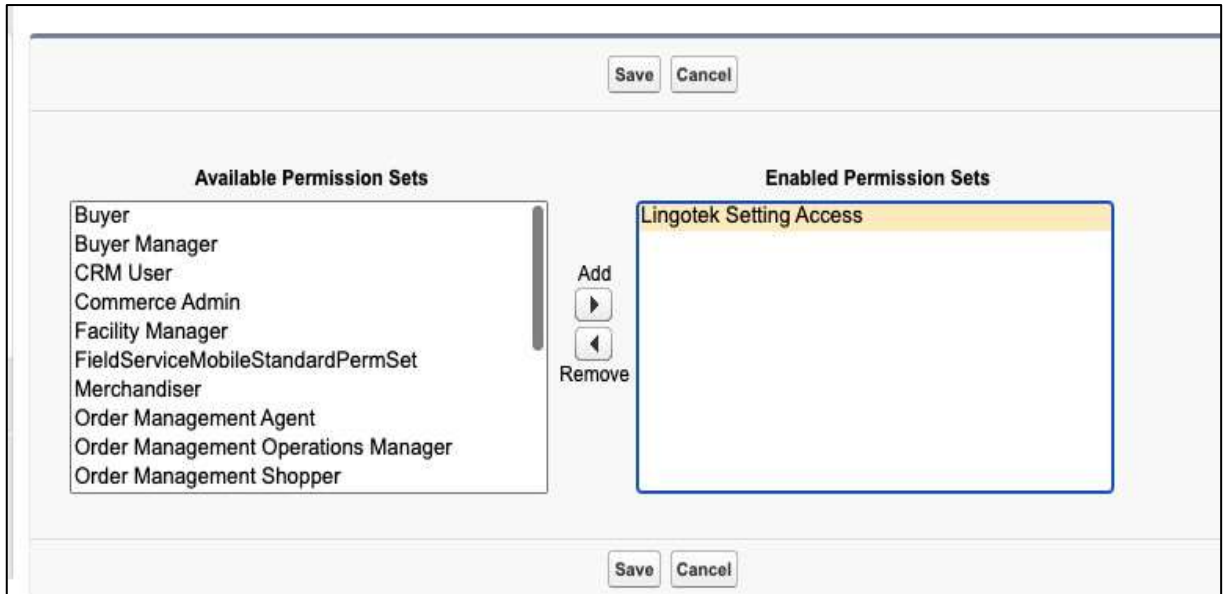
- Now from **Fields**, select **Translation** field and drag and drop it within Opportunity Information



## User access for SLC Language and SLC Setting Object

**Note:** This permission set is useful when the package is only installed for salesforce administrators, and you want to give users access to the SLC Language and SLC Lingotek Setting Object.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it under Available Permission Sets and click **Add Lingotek Setting Access**. To remove a permission set assignment, select it under Enabled Permission Sets and click **Remove**.



The screenshot shows a web-based interface for managing user permissions. It features two main panels: 'Available Permission Sets' on the left and 'Enabled Permission Sets' on the right. The 'Available' panel contains a list of roles: Buyer, Buyer Manager, CRM User, Commerce Admin, Facility Manager, FieldServiceMobileStandardPermSet, Merchandiser, Order Management Agent, Order Management Operations Manager, and Order Management Shopper. Between the panels are 'Add' and 'Remove' buttons with right and left arrows. The 'Enabled' panel currently has 'Lingotek Setting Access' selected. 'Save' and 'Cancel' buttons are located at the top and bottom of the interface.

| Available Permission Sets           | Enabled Permission Sets |
|-------------------------------------|-------------------------|
| Buyer                               | Lingotek Setting Access |
| Buyer Manager                       |                         |
| CRM User                            |                         |
| Commerce Admin                      |                         |
| Facility Manager                    |                         |
| FieldServiceMobileStandardPermSet   |                         |
| Merchandiser                        |                         |
| Order Management Agent              |                         |
| Order Management Operations Manager |                         |
| Order Management Shopper            |                         |

5. Click **Save**.