EverReady Highlights

Installation Guide

Summary

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1. Prerequisite

1. Lightning Web Security has to be enabled

Here is a link to the Salesforce documentation introducing Lightning Web Security: https://developer.salesforce.com/docs/platform/lwc/guide/security-lwsec-intro.html

Additionally, here is the documentation on how to perform the operation: https://developer.salesforce.com/docs/platform/lwc/guide/security-lwsec-enable.html

Test Lightning Web Security in a sandbox environment first and then in production.

New orgs have Lightning Web Security for Lightning web components and Aura components enabled by default. If you plan to populate a new org with pre-existing or packaged Lightning web components, be sure to test first in a sandbox environment with LWS enabled. For more information, see Workflow to Try Your LWCs with Lightning Web Security.

For information about scratch orgs, see Enable and Disable LWS in Scratch Orgs.

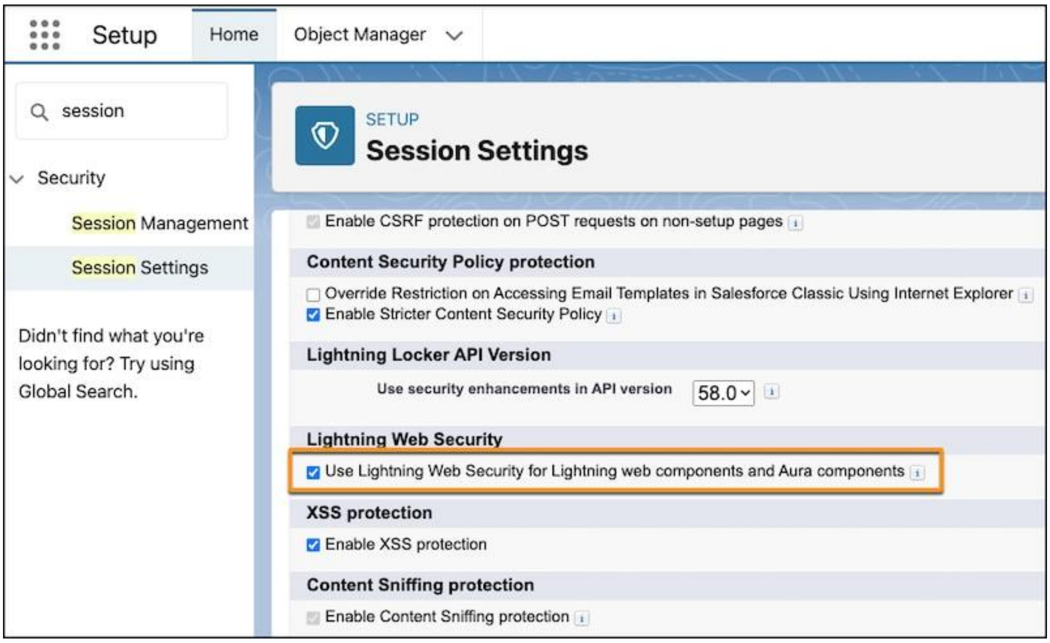
Important

Before enabling, see When to Enable Lightning Web Security to determine whether to enable it in your production org.

To use Lightning Web Security in an org:

1. From Setup, in the Quick Find box, enter Session, and then select Session Settings.
2. On the Session Settings page, select Use Lightning Web Security for Lightning web components and Aura components and save.
3. Clear your browser cache after enabling or disabling Lightning Web Security to ensure the correct files are loaded in the browser. If you suspect that the correct security architecture is not in effect, see Delayed Enabling or Disabling of LWS.

Session Settings page with Lightning Web Security selected



Important

LWS relies on Stricter CSP to fully implement its security measures. We strongly advise that you keep the Enable Stricter Content Security Policy setting switched on when LWS is enabled.

Activating this mode should not cause any regressions, but **it is strongly recommended to test this change in your Sandbox before enabling it in production**.

2. Make sure the EverReady users have **read access to the following standard fields :**

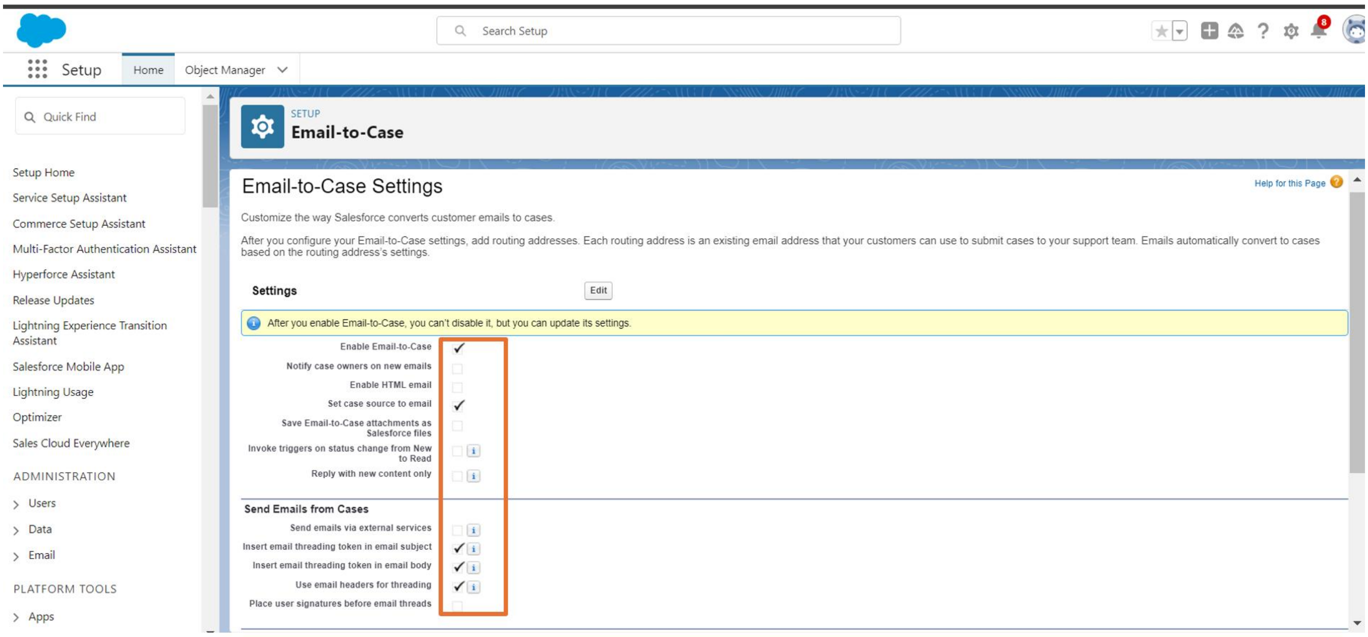
Object	Field Name
Account	ParentId
Contact	AccoundId
Contact	MobilePhone
Contact	Title
Opportunity	IsWon
Opportunity	IsClosed
Event	Description
Event	Type
Event	WhoId
Event	WhatId
Event	EventSubType
Event	ActivityDateTime
Event	Subject
Event	eventDate
Task	Description
Task	Type
Task	WhoId
Task	WhatId
Task	ActivityDate
Task	TaskSubtype
Task	Subject
Task	IsClosed
Task	CompletedDateTime
Task	CallType

If you allow users to relate a contact to multiple accounts in order to use Account Contact Relationship (Account Settings > Contacts to Multiple Accounts Settings).

You have to Make sure that EverReady users have **read access to the following fields :**

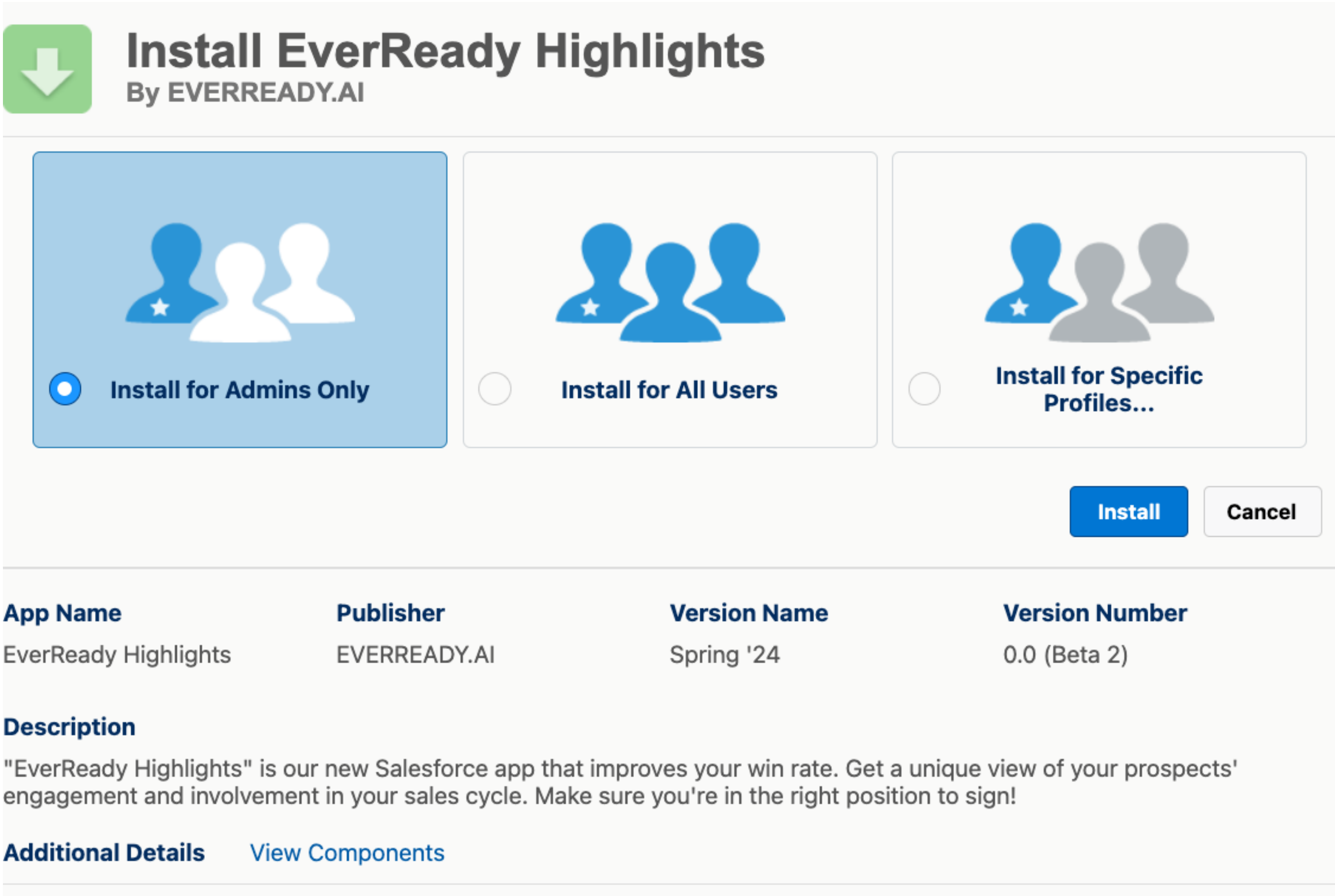
Object	Field Name
AccountContactRelation	EndDate
AccountContactRelation	IsActive
AccountContactRelation	Roles
AccountContactRelation	StartDate

3. Make sure to **Enable Email to Case**

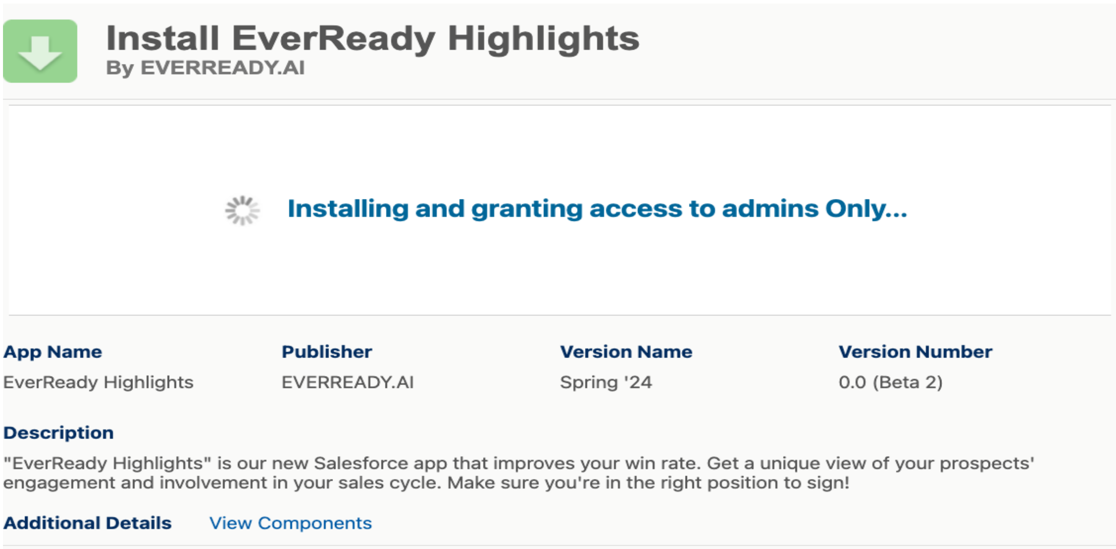


2. Package Installation

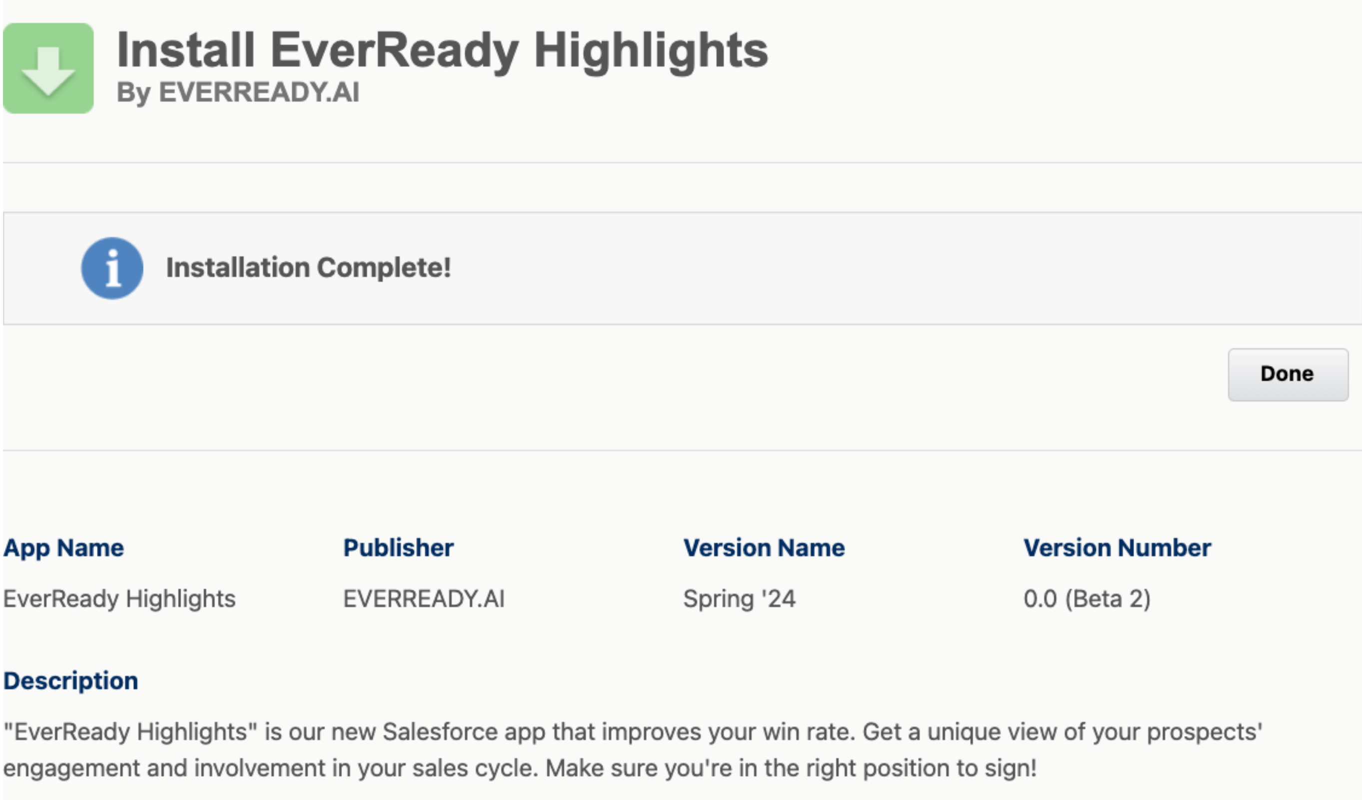
4. Get the [EverReady](#) App from AppExchange.
5. Choose the **Install for Admins Only** option. Application access will be managed using permission sets. Click on the **Install** button to start the installation of the package.



6. A "processing" screen will appear



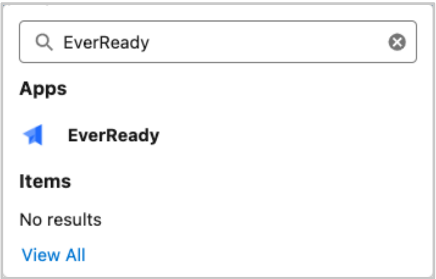
7. If the installation is too long and an email will be sent to you when the installation is complete, else click on the **Done** button.



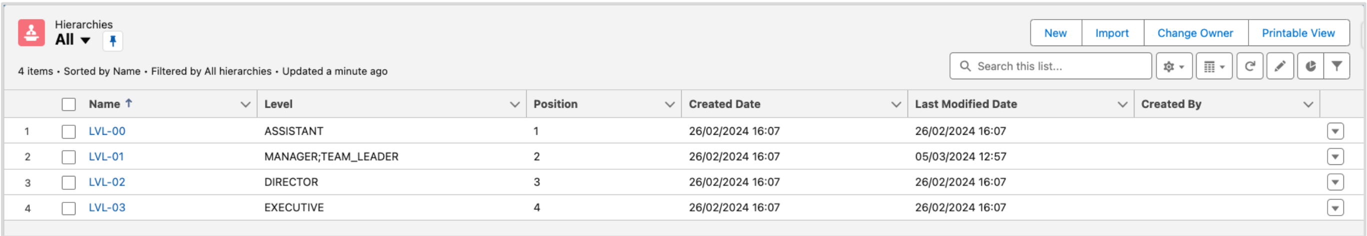
8. After installation, the package will appear in the list of installed packages.

3. EverReady App

From the App Launcher, search for the **EverReady** app and launch it :



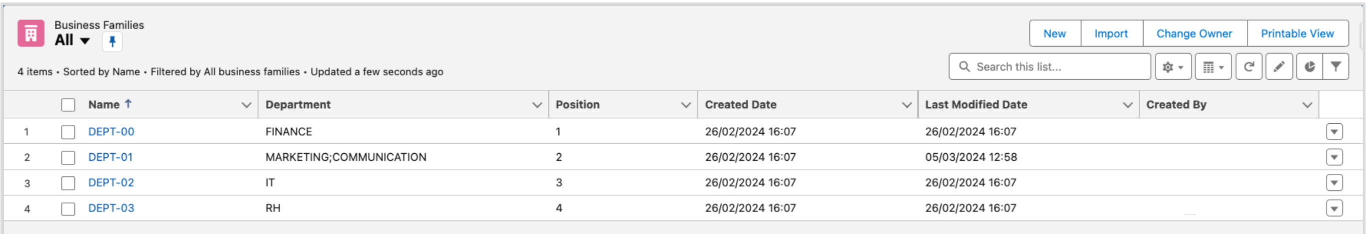
- On the **Hierarchies** tab, you can configure:


Hierarchies
All
New | Import | Change Owner | Printable View
4 items • Sorted by Name • Filtered by All hierarchies • Updated a minute ago
Search this list...

	Name	Level	Position	Created Date	Last Modified Date	Created By
1	LVL-00	ASSISTANT	1	26/02/2024 16:07	26/02/2024 16:07	
2	LVL-01	MANAGER;TEAM_LEADER	2	26/02/2024 16:07	05/03/2024 12:57	
3	LVL-02	DIRECTOR	3	26/02/2024 16:07	26/02/2024 16:07	
4	LVL-03	EXECUTIVE	4	26/02/2024 16:07	26/02/2024 16:07	

  - **Level**: the hierarchical level of the contacts, multiple values can be chosen.
  - **Position**: the line display order in the cartography, unique value from 1 to 4.

- On the **Business Families**, you can configure:


Business Families
All
New | Import | Change Owner | Printable View
4 items • Sorted by Name • Filtered by All business families • Updated a few seconds ago
Search this list...

	Name	Department	Position	Created Date	Last Modified Date	Created By
1	DEPT-00	FINANCE	1	26/02/2024 16:07	26/02/2024 16:07	
2	DEPT-01	MARKETING;COMMUNICATION	2	26/02/2024 16:07	05/03/2024 12:58	
3	DEPT-02	IT	3	26/02/2024 16:07	26/02/2024 16:07	
4	DEPT-03	RH	4	26/02/2024 16:07	26/02/2024 16:07	

  - **Department**: the service department of the contacts, multiple values can be chosen.
  - **Position**: the column display order in the cartography, unique value from 1 to 4.

4. Activity Weighting

The engagement calculation is =

(incoming activities * their weighting) / (all activities * their weighting)

You can customize weightings in order to impact the engagement calculation, as explained in the next paragraphs.

You can use:

- Default Weightings to customize the default weighting.
- Custom Weightings that you can link to as Task Subject / Topic value.

4.1. Activity Weighting

From the **Setup**, under **Custom Code** section, select **Custom Metadata Types** and then click on **Manage Records** on the **Activity Weighting** row:

Action	Label ↑	Pondération des activités Name	Incoming	Weighting
Edit	Incoming Call	INCOMING_CALL	✓	1
Edit	Incoming Email	INCOMING_EMAIL	✓	1
Edit	Meeting	MEETING	✓	4
Edit	Outgoing Call	OUTGOING_CALL		1
Edit	Outgoing Email	OUTGOING_EMAIL		1

You can customize the weighting of these 5 activity types for the engagement calculation.

4.2. Custom Weighting Mappings

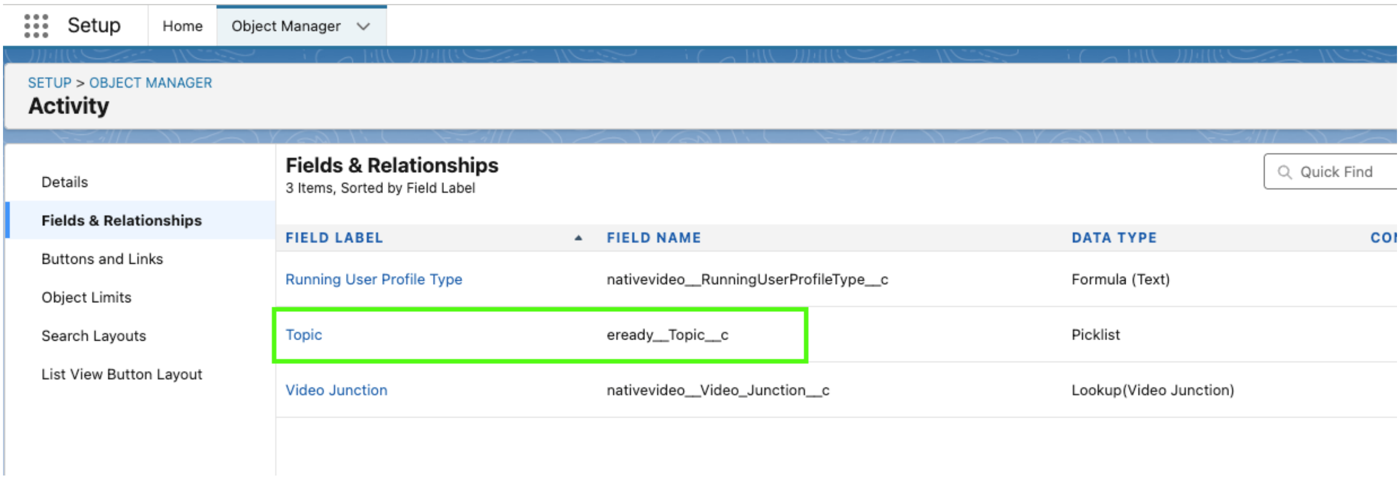
If you want to customize Weightings by mapping Task Subject/Topic values to a new activity type, you have to:

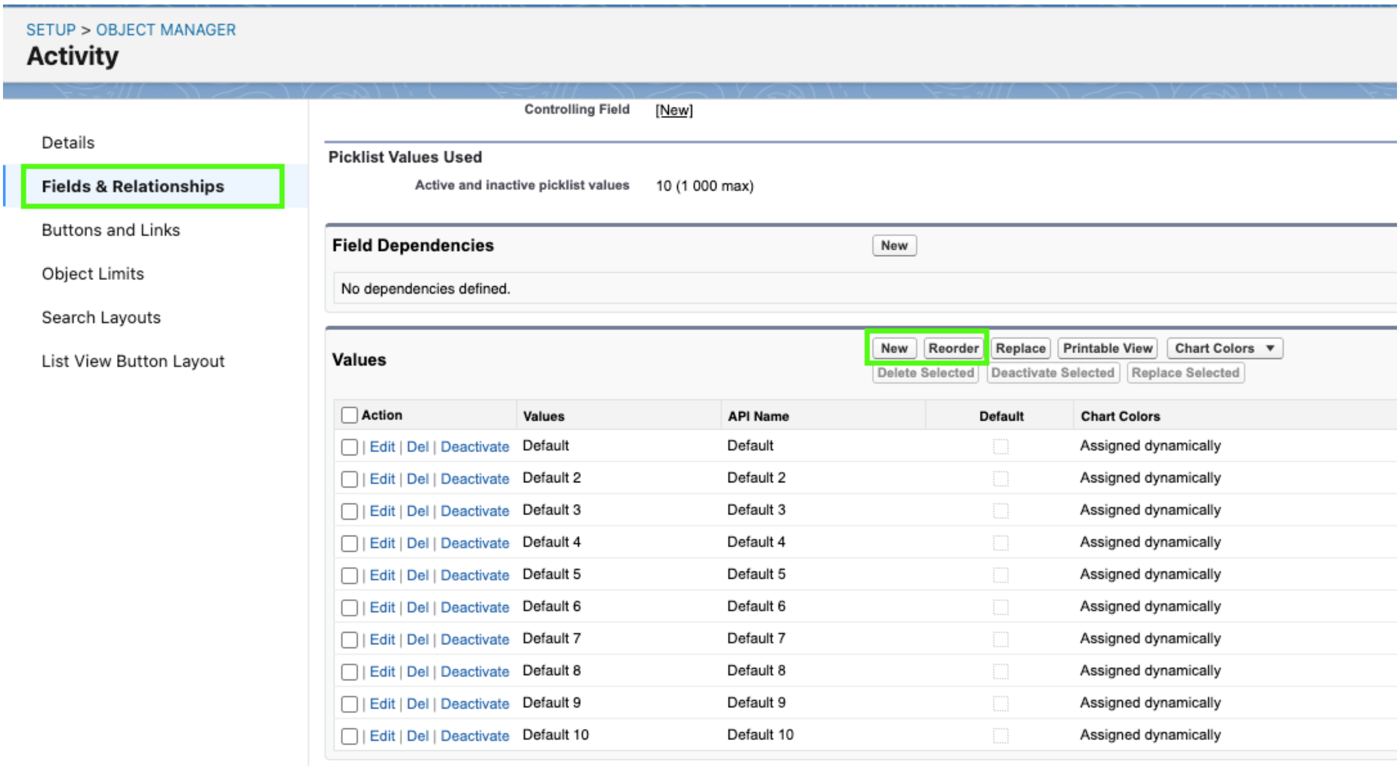
1- From Setup > Object Manager > on **EmailMessage and Activity** objects:

   a. Activity object is used for Task and Event (Salesforce's architecture)

   b. You have to do it on EmailMessage object separately (Salesforce's architecture)

   c. Fill the values for the field Topic (eready__Topic__c) on both objects, as it will be linked to Task Subject later



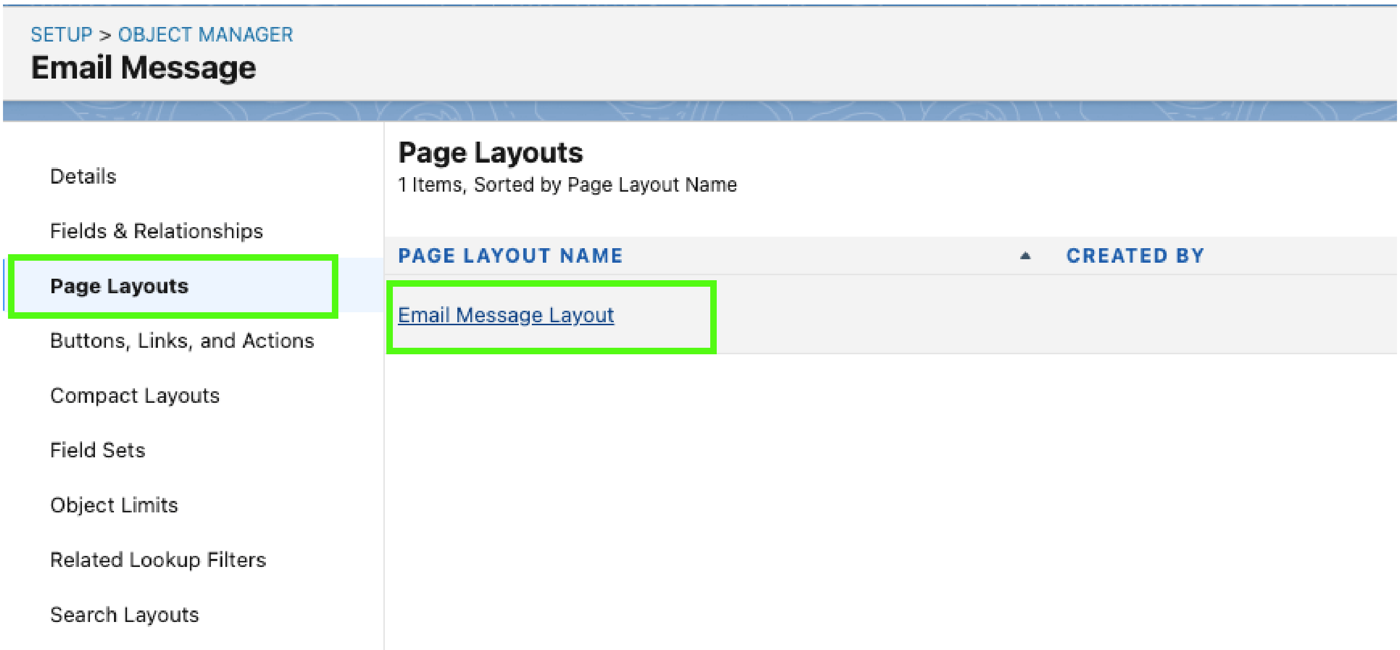


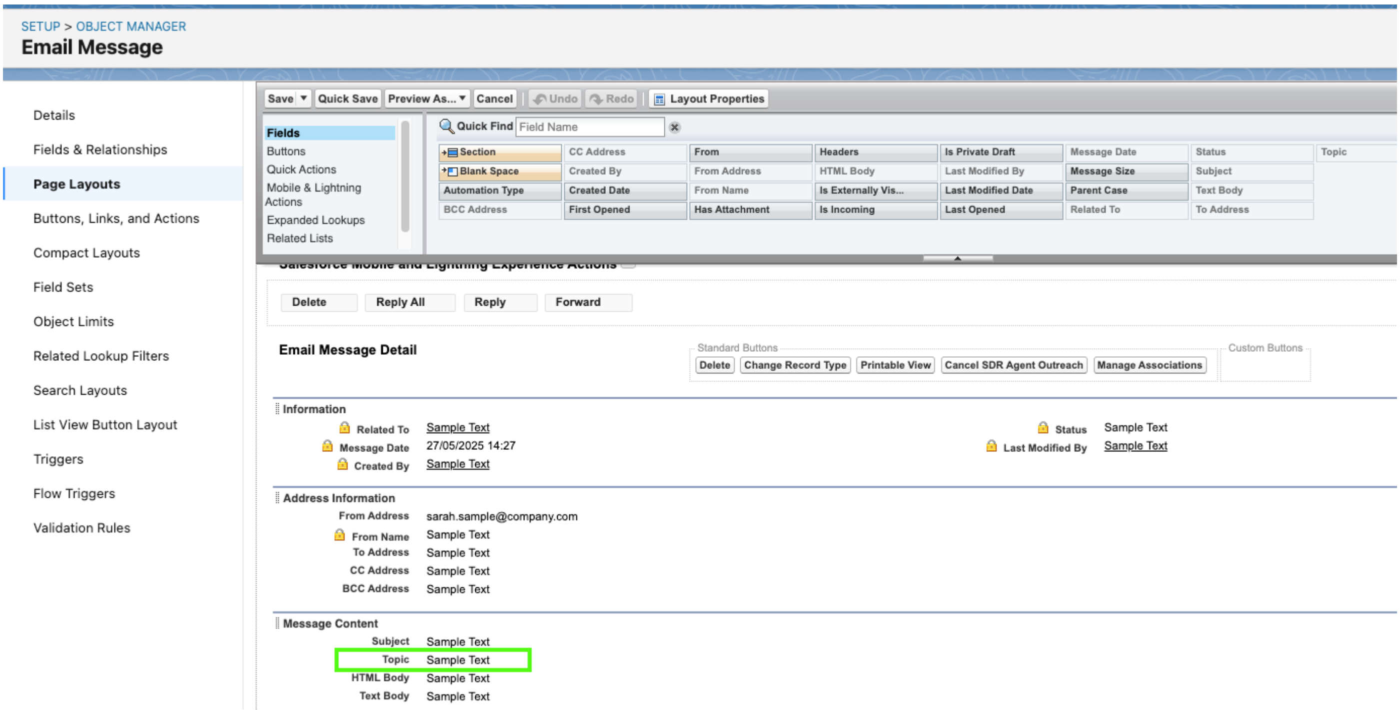
d. You can also add Topic fields to Page Layouts for:

   i. Task object

   ii. Event object

   iii. EmailMessage object



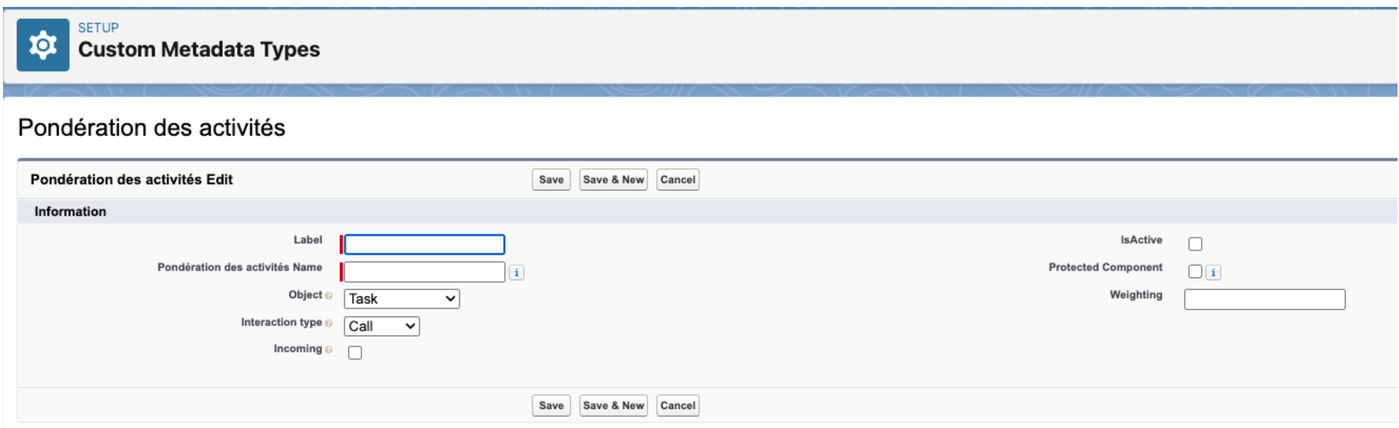


2- from the **Setup**, under **Custom Code** section, select **Custom Metadata Types**, click on **Manage Records** on the **Activity Weighting** row and then click on the **New** button:

- fill the standard fields **Label** and **Pondération des activités Name** as you wish,
- fill the field **Object**
  - = the standard object you want to match
  - Example: if you select “Task”, it will consider the tasks you create (with the right Topic) for the calculation.

- fill the field **Interaction type**
    - = the type of interaction you want to classify
    - **Task** object can be classified as a Call, Meeting or Email
    - **Event** object can only be classified as a Meeting
    - **EmailMessage** object can only be classified as an Email
    - Example: if you select “Meeting”, it will consider the tasks you create (with the right topic) as a meeting.
- check the field **Incoming** if needed
    - Call and Meeting interaction types are considered as Incoming, whether you check it or not.
    - For Email interaction type:
        - If you check Incoming => it will consider the incoming emails.
        - If you don’t check incoming => it will consider the outbound emails (and potentially lower your engagement rate).
    - Example: if you select “Email” and check “Incoming”, it will consider the tasks you create (with the right topic) as an incoming email.
- check **IsActive** checkbox
- fill the field **Weighting** as you wish
    - This is where you define the weight for your interaction, that will impact the engagement calculation.
    - Example: if you select “Email”, check “Incoming” and fill a weighting as 100, it will consider the tasks you create (with the right topic) as an incoming email with a 100 weighting.

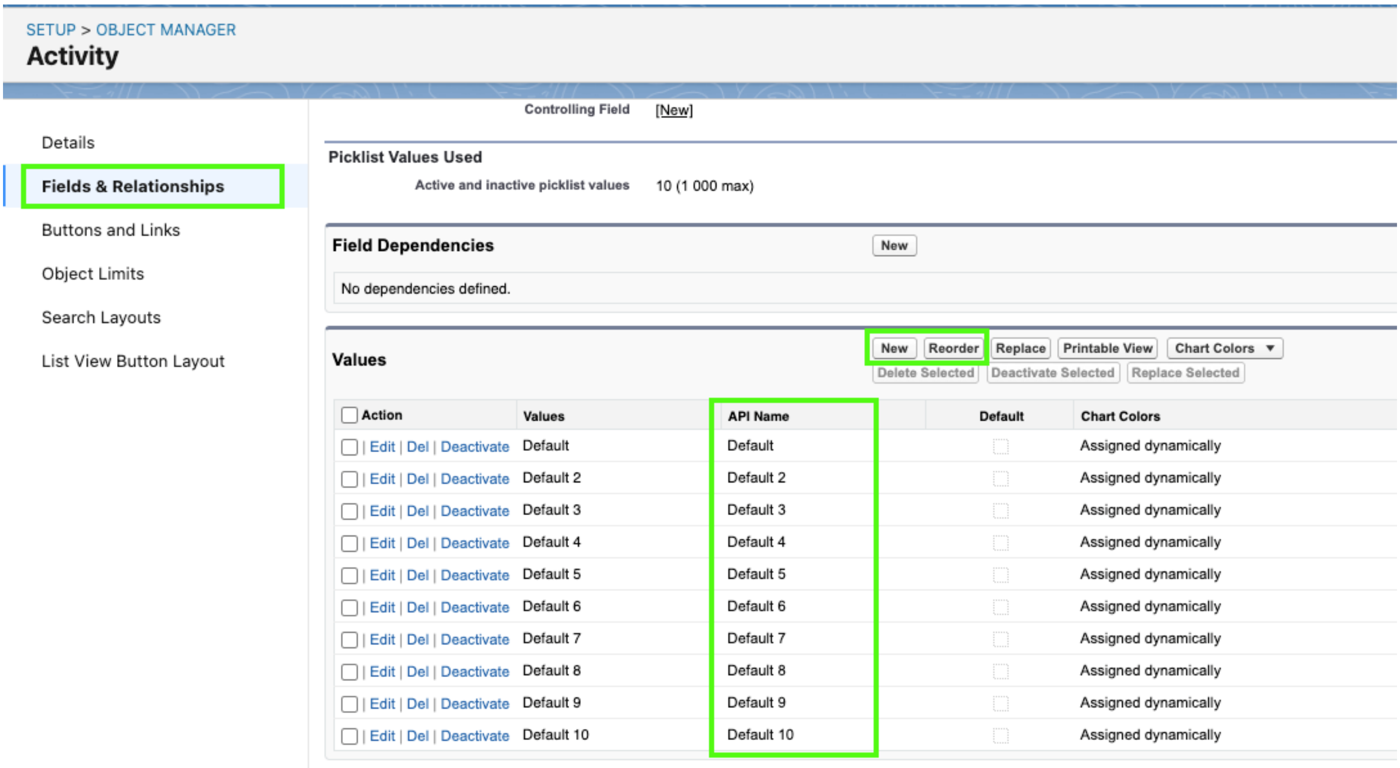
- click on the **Save** button.



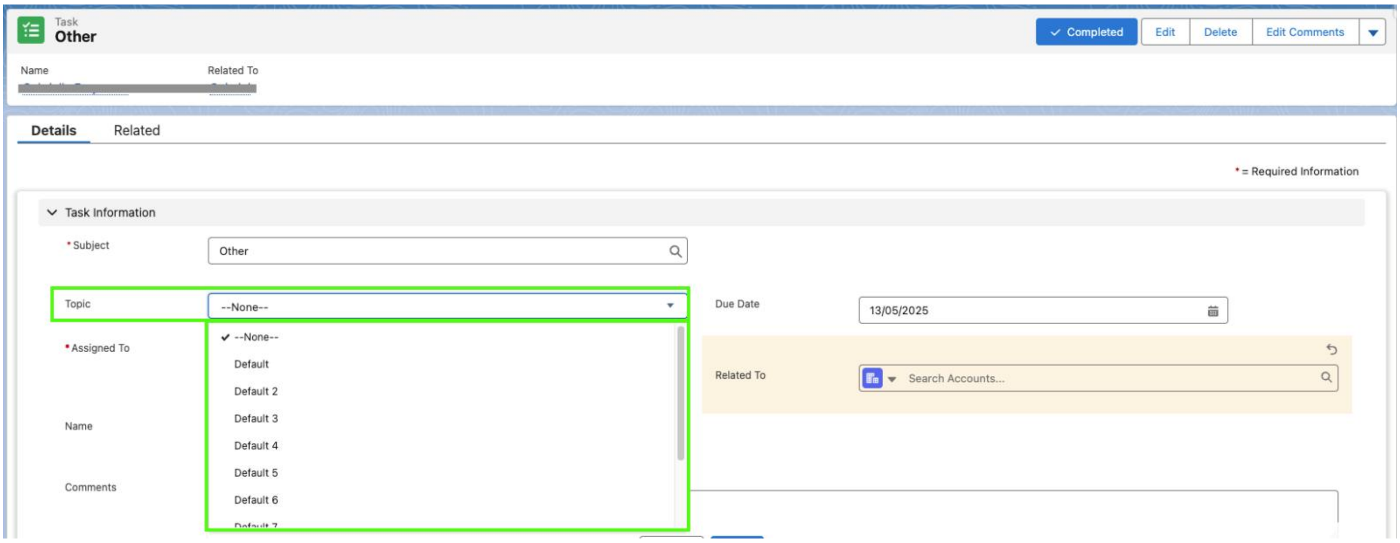
=> This setting is not yet completed, you need a last step to make it work.

3- from the **Setup**, under **Custom Code** section, select **Custom Metadata Types**, click on **Manage Records** on the **Custom Weighting Mappings** row and then:

- fill the standard fields **Label** and **Task Subject Mapping Name** as you wish
- fill the **Activity Weighting** lookup field with one of the Custom Activity Weighing records you just created (as explained on last paragraph)
  - It is the link you need to apply the right weighting => if you don't link an Activity Weighting, it won't work.
- fill the **Task Subject** field with an existing value for the fields **"Topic"** on your org
  - Use the **API Name** of the Topic value:

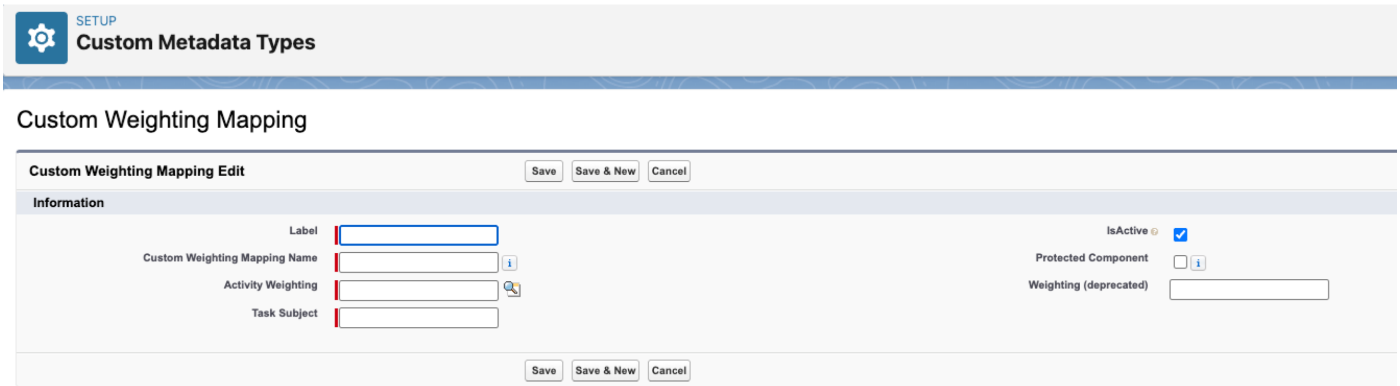


  - It is the link you need to match the Topic you will choose on your records => if you don't use the right Topic API Name, it won't work.
  - Example:
    - On Activity Weighting: if you select "Email", check "Incoming" and fill a weighting as 100 and then;
    - On Custom Weighting Mapping: if you select the right Topic API Name as Task Subject, it will consider the tasks you create with this same Topic as an incoming email with a 100 weighting.
    - Here is an example on a Task, where you can choose a Topic value to make it match:



- check **IsActive** checkbox

- click on the **Save** button.



4.3. Other precisions

- You are limited to 10 custom weightings.
- For a record to be considered it has to be:
  - Completed: a task should be completed, a meeting or call should be done and an email should be sent to be considered.
  - Assigned to:
    - The right user should be assigned to a task, meeting or a call to be considered.
    - For an email, it's the user in "created by" field who is considered.
  - Related to:
    - The right account should be related to a task, meeting or a call to be considered.

- For an email “related to” can be blank as long as you have the contacts linked.

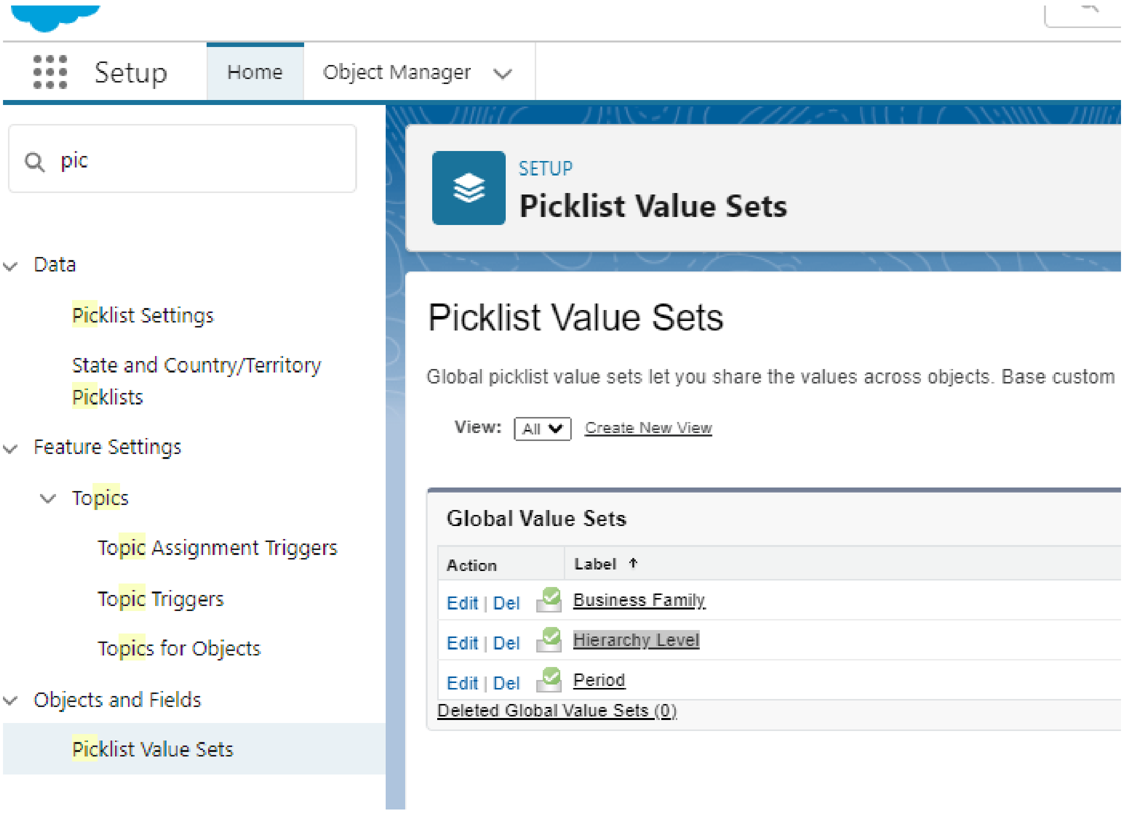
- Name:
    - The right contact should be filled in “Name” field for a task, meeting or a call to be considered.
    - The right contacts should be filled in “Send and recipients” related list for an email to be considered.

5. Add new hierarchies

5.1. Hierarchy value on Contact and eready_Hierarchy__c objects

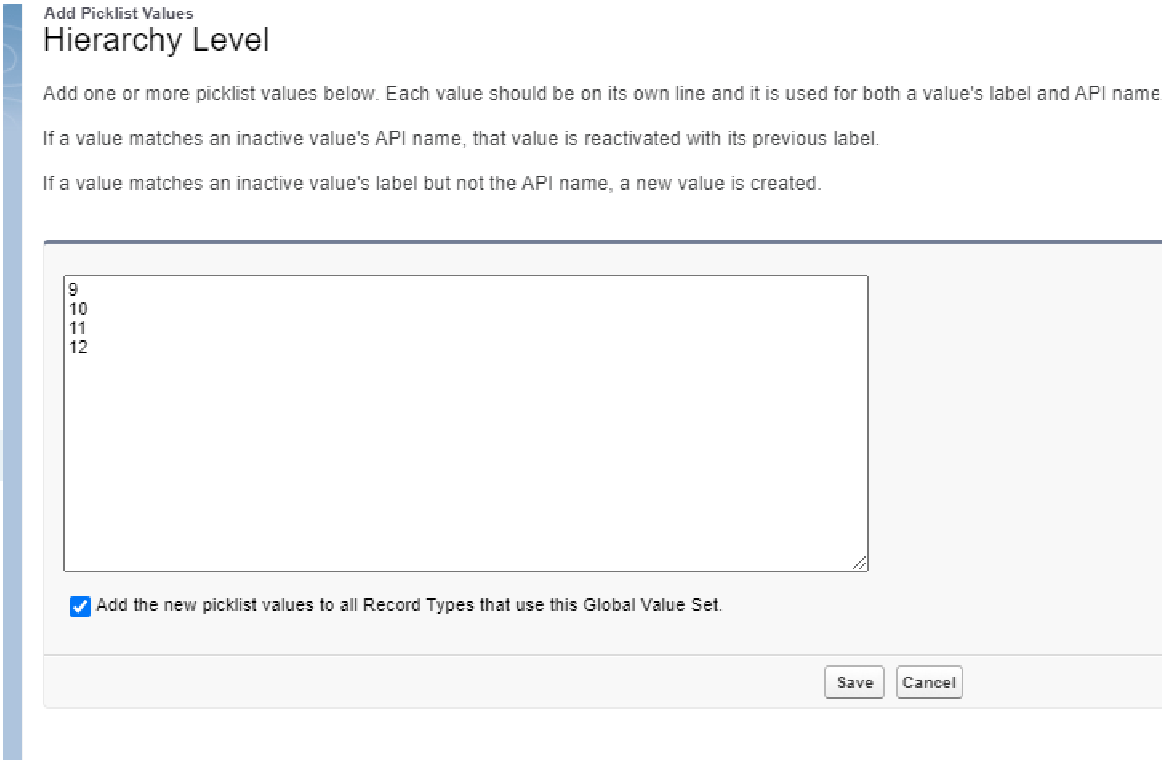
First you must add hierarchy value to the global picklist

- Go to setup/Picklist Value Set and click on **Hierarchy Level** link

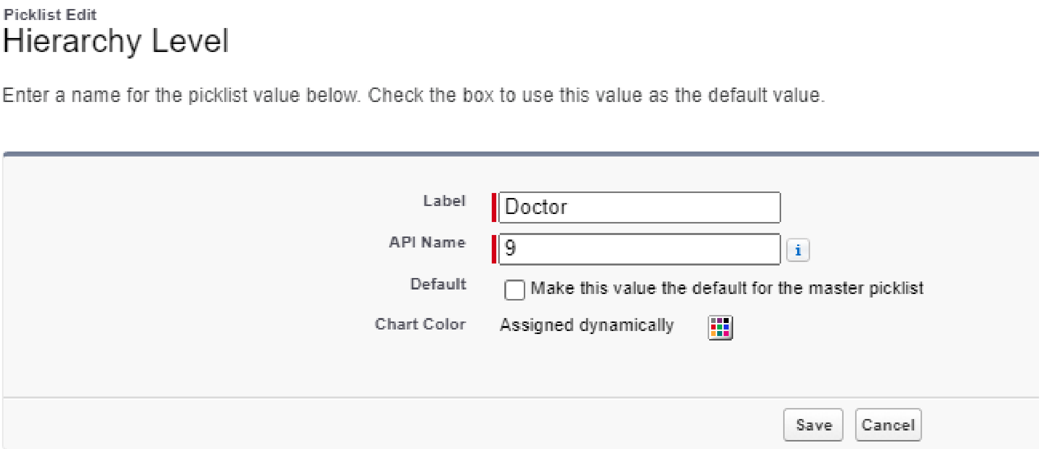


- Next, click on **New** button
- fill the **Weighting** field if you want to override the default weighting.

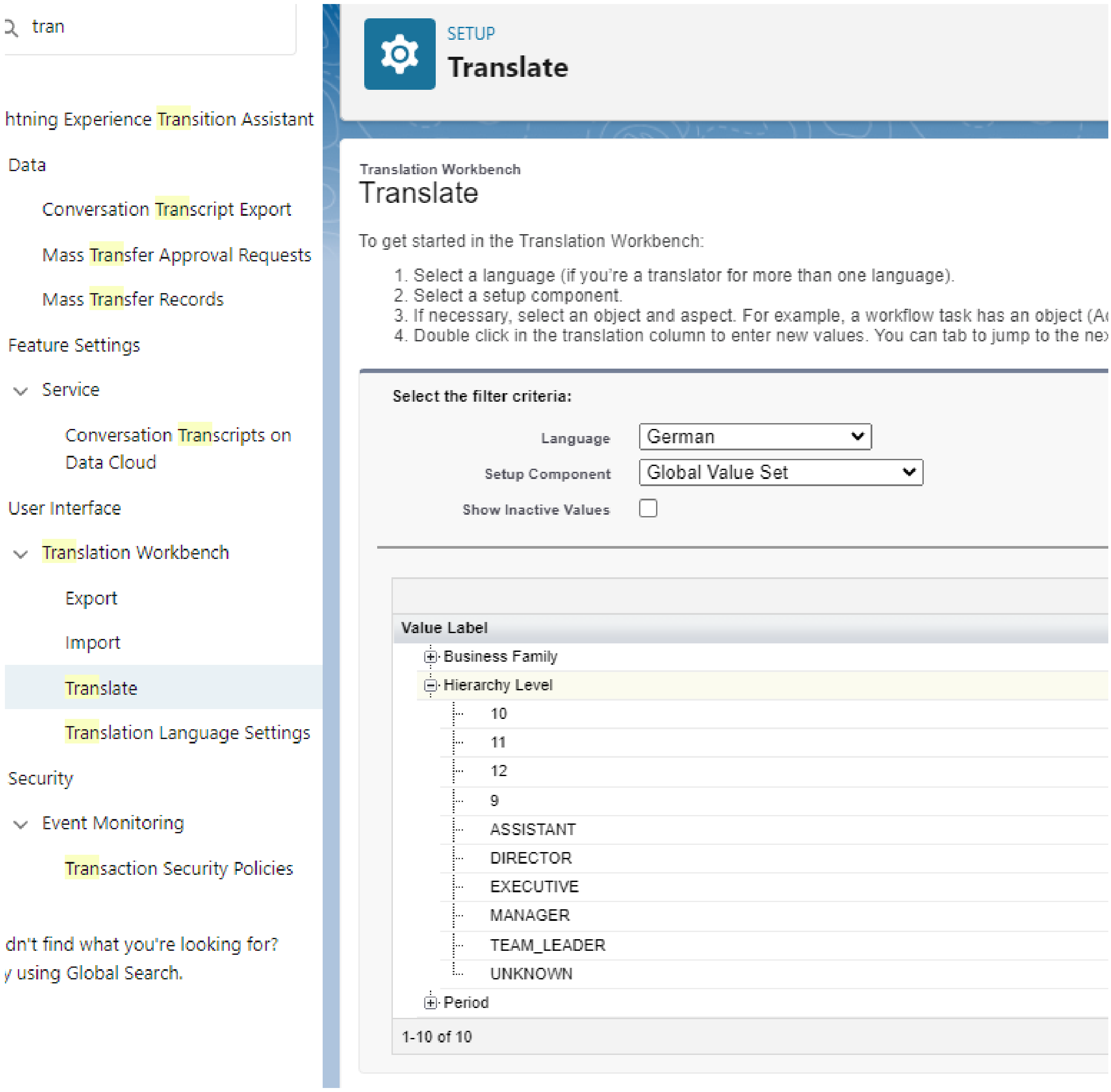
- click on the **Save** button on the Values associated list view and enter all the API values you want (line breaks separated) and save



- You can modify the label of each value by clicking on the edit button located right in front of each value (Only modify the label).



- If your organization is multilanguage, you can add translate in the “translate” menu workbench



5.2. Hierarchy weighting

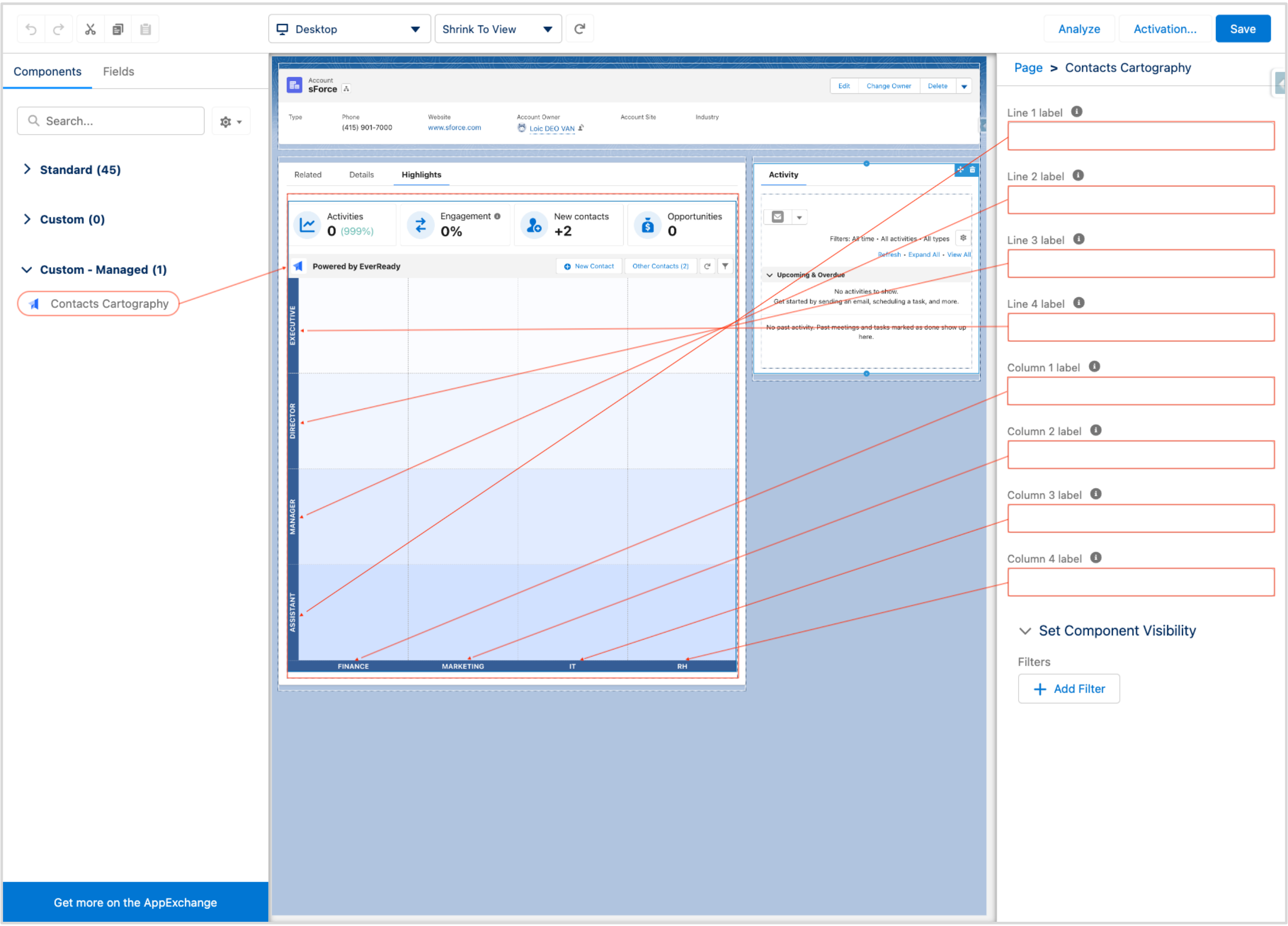
When you add new hierarchies, you must specify the weight of each hierarchy and which hierarchy is a decision maker

You must specify the weight of each hierarchy, and which hierarchy is a decision maker

- Go to setup / custom metadata types and click to "**Manage Records**" link right in front of the Weighting
- Click new and set the values you want
  - **Label** : the value you desire
  - **Decision Maker Weighting Name** : the value you desire
  - **Weighting :** The weight that counts for the current hierarchy
  - **HierarchyLevel** : The **API name** of the value you add on the contact and Hierarchy Object

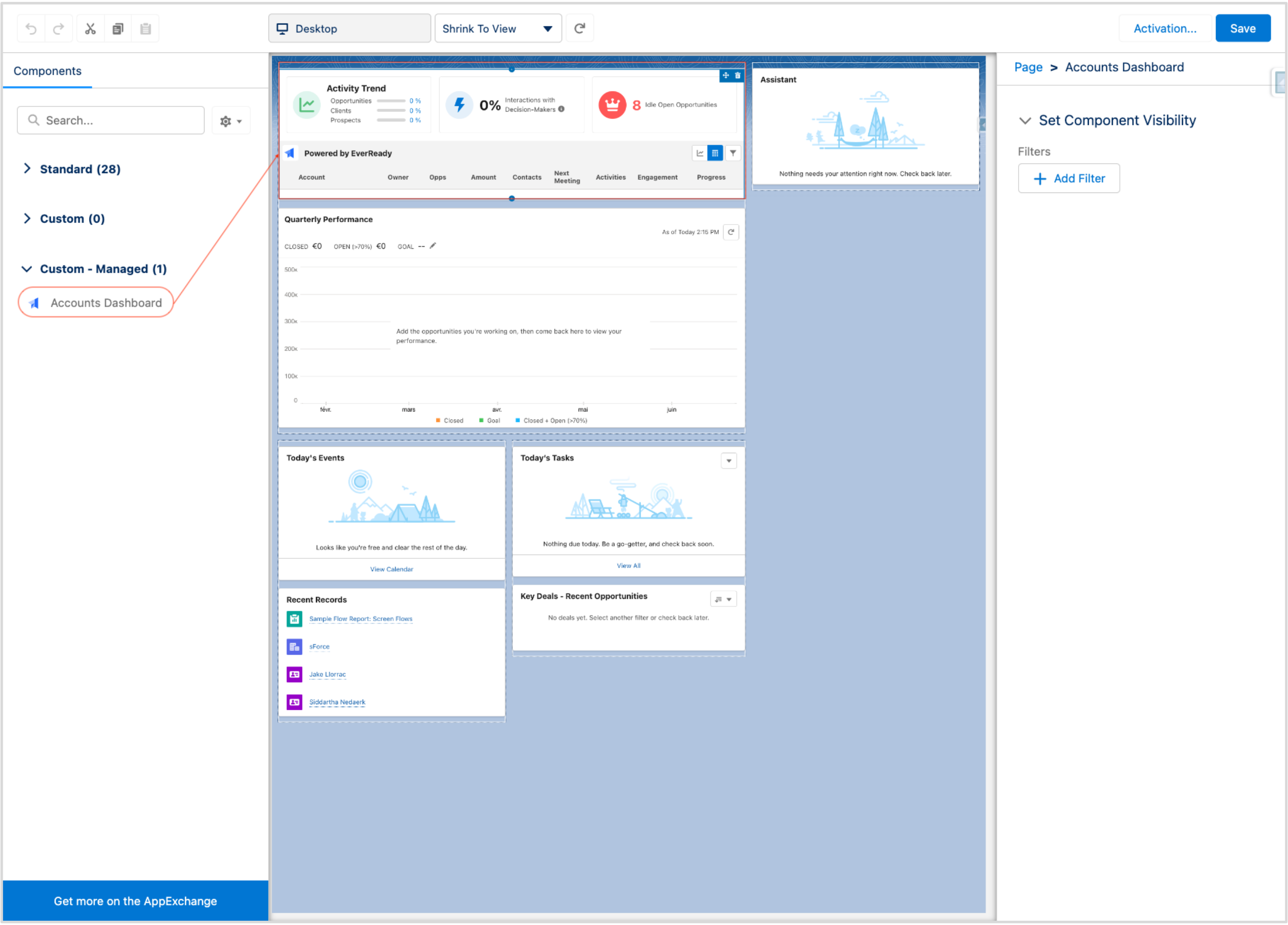
6. Contacts Cartography

1. Open an Account record
2. From the Global Header, click on the **Setup** icon and then on the **Edit Page** option.
3. If you have the Tabs component on the Record Page, you can add a new Tab:
    - Tab Label : **Custom**
    - Custom Label : **Highlights**
4. From the left panel, go to the **Custom - Managed** section and then drag & drop the **Contacts Cartography** component inside the **Highlights** tab
5. If you click on the **Contacts Cartography** component, you will see the component's properties on the right panel that you can use to override standard labels:
    - Line [N] label: Custom Label for the line N (from bottom to top)
    - Column [N] label: Custom Label for the column N (from left to right)



7. Accounts Dashboard

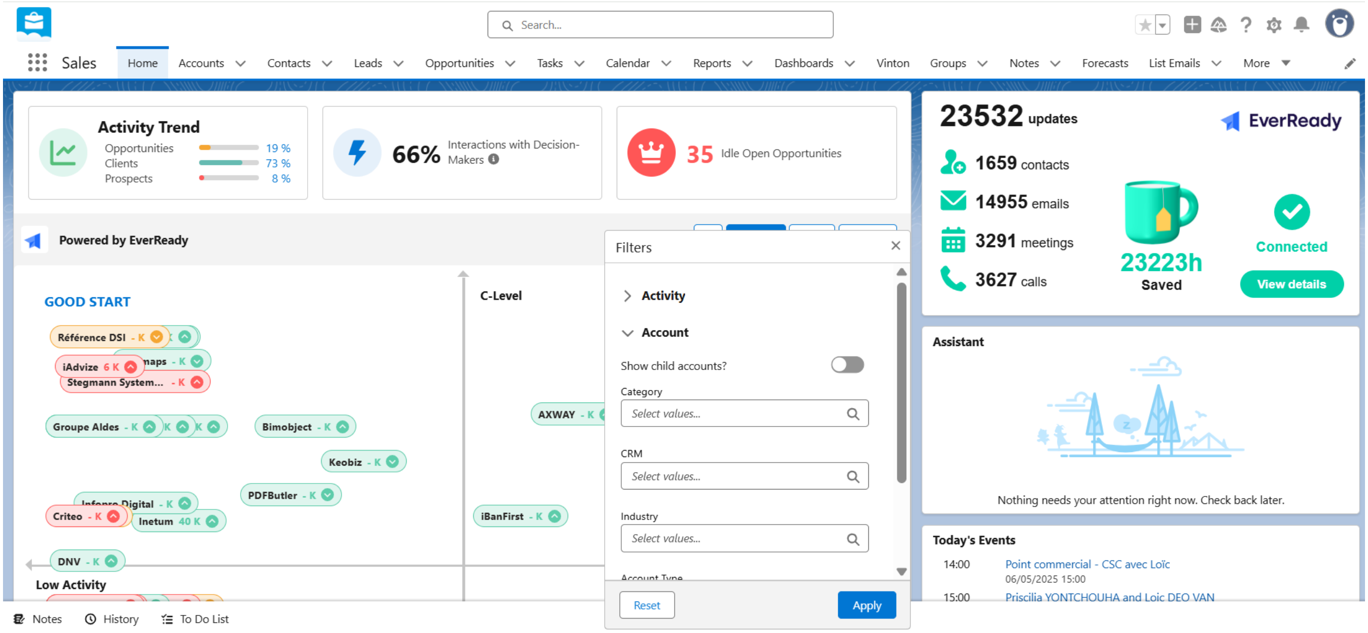
1. Open your Home Page
2. From the Global Header, click on the **Setup** icon and then on the **Edit Page** option.
3. From the left panel, go to the **field API name** section and then drag & drop the **Accounts Dashboard** component on a flexi page region.



8. Dynamic filters (Dashboard/Graph)

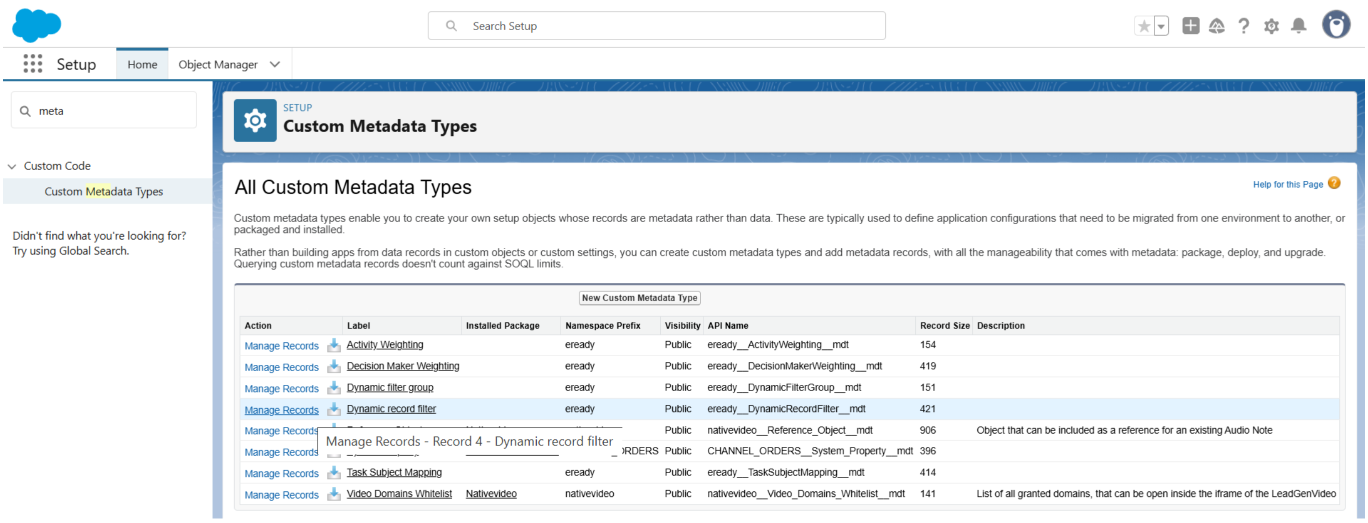
You can customize the dashboard and graph filters using picklist values from both **Accounts** and **Opportunities**, whether they are standard or custom fields.
Up to **5 custom filters** can be added for each.

This allows users to better filter and display the relevant companies in the dashboard and graphs.



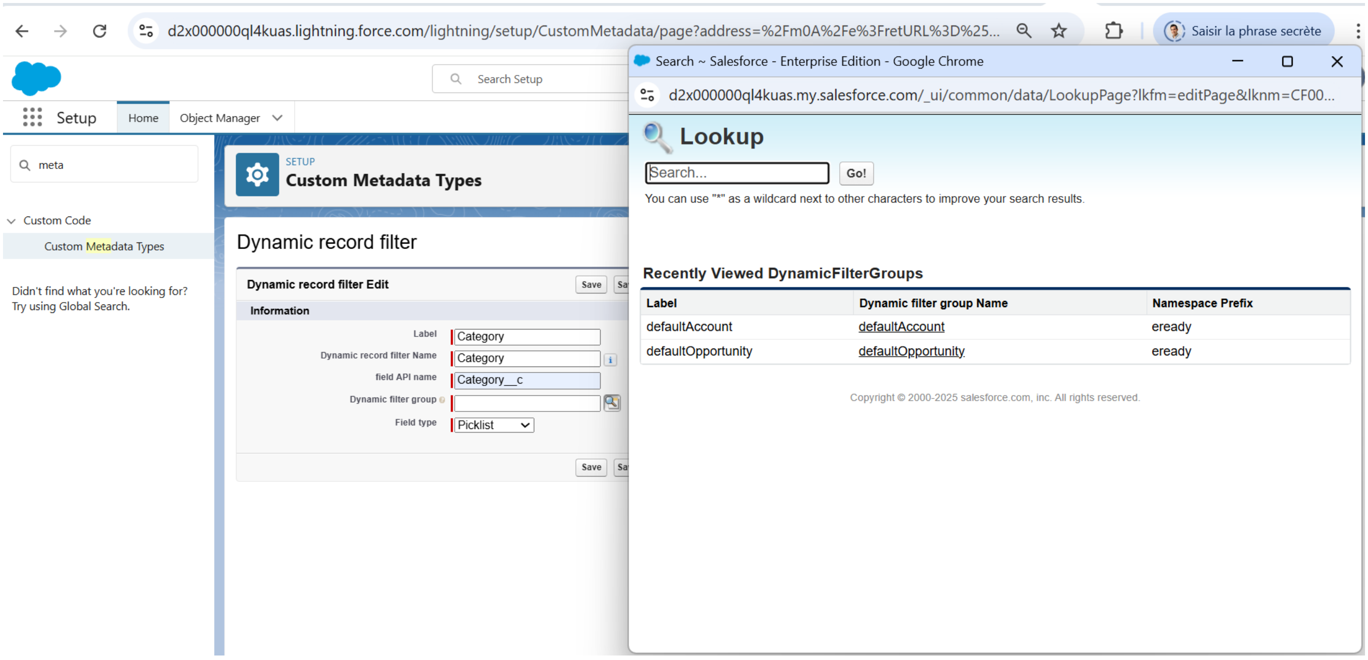
Simply follow these steps to add up to five filters using picklist or multi-picklist fields of your choice:

1/ Go to **Setup > Custom Metadata Types**, then click the **Manage Records** link next to the **Dynamic record filter**.



2/ Click **"New"** and complete the required fields.
In the **Field API Name** field, enter the API name of the field you want to use as a filter, and select the appropriate **Field Type**.
Next, link the record to the corresponding **filter group using lookup (defaultAccount or defaultOpportunity)**, then save.

Repeat this process for each field you want to filter (maximum of 5 fields per filter group).



3/ Go to the **Home** page, click on the **Filter** button, then click **Reset**. Finally, refresh your browser — your new filters should now appear!