



Lative Onboarding

Salesforce Installation Guide

Last update – March 2023



This guide will describe all necessary steps to install and configure the Lative app from the Salesforce AppExchange.

Summary



Prerequisite on Salesforce

Step 1. **Initiate install**

a) Initiate install from AppExchange web

b) Initiate install from Salesforce Setup

Step 2. Define **where to install the package**

Step 3. **Confirm installation details**

Step 4. Determine the **limited access** to certain profiles and users

Step 5. **Install Lative**

Step 6. **Access Lative on App Manager**

Step 7. **Edit Policies** for Lative

Step 8. **Configure OAuth Policies**

Step 9. **Grant Lative access to Profiles**

Step 10. **Add Lative Tab** to an App

Step 11. **Access Lative** through new Tab

Step 12. **Onboarding call with Lative**

Prerequisite on Salesforce



Ensure that you meet the following criteria for successful installation: you (or the login you are using) need **full admin access** on one of the following editions:

A. Salesforce: Enterprise, Performance, Unlimited, or Developer edition

Or

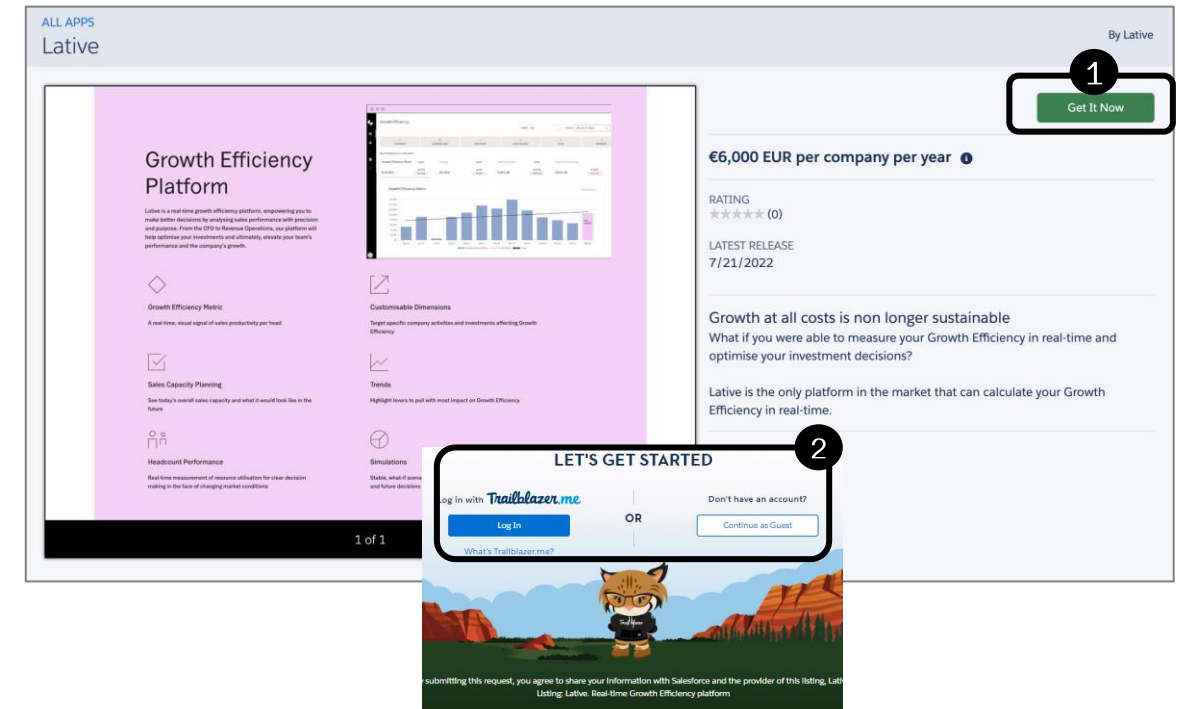
B. Salesforce: Professional Edition requires API Access (May require an additional fee, please contact Salesforce for more information.)

Step 1a. Initiate install from AppExchange web



Connect to Lative on the AppExchange - [click here](#)

1. Click on the **Get it Now** button to start the installation process
2. If you are not logged in yet into Trailblazer* yet, the system will ask you to login

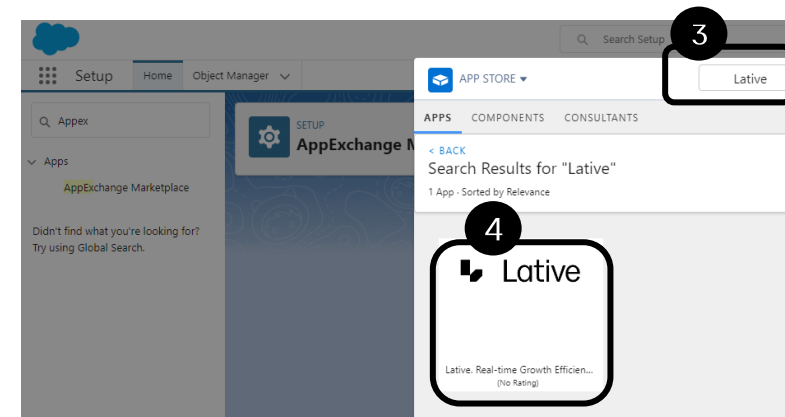
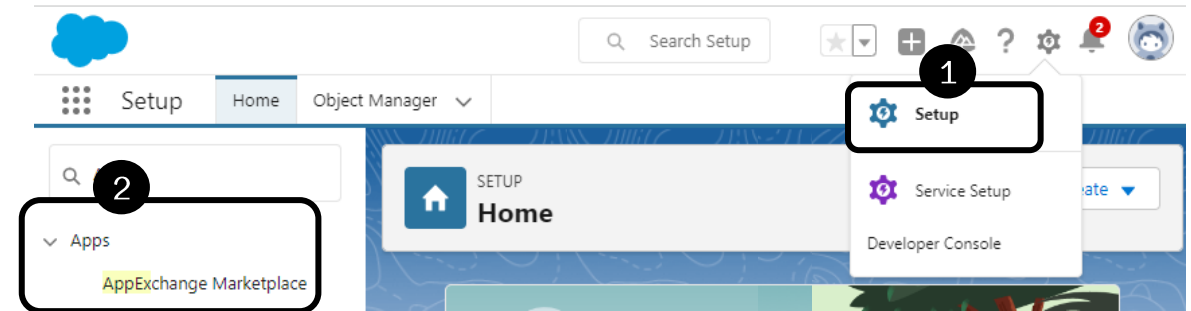


*[Click here](#) to read the article from Salesforce about Trailblazer

Step 1b. Initiate install from Salesforce Setup

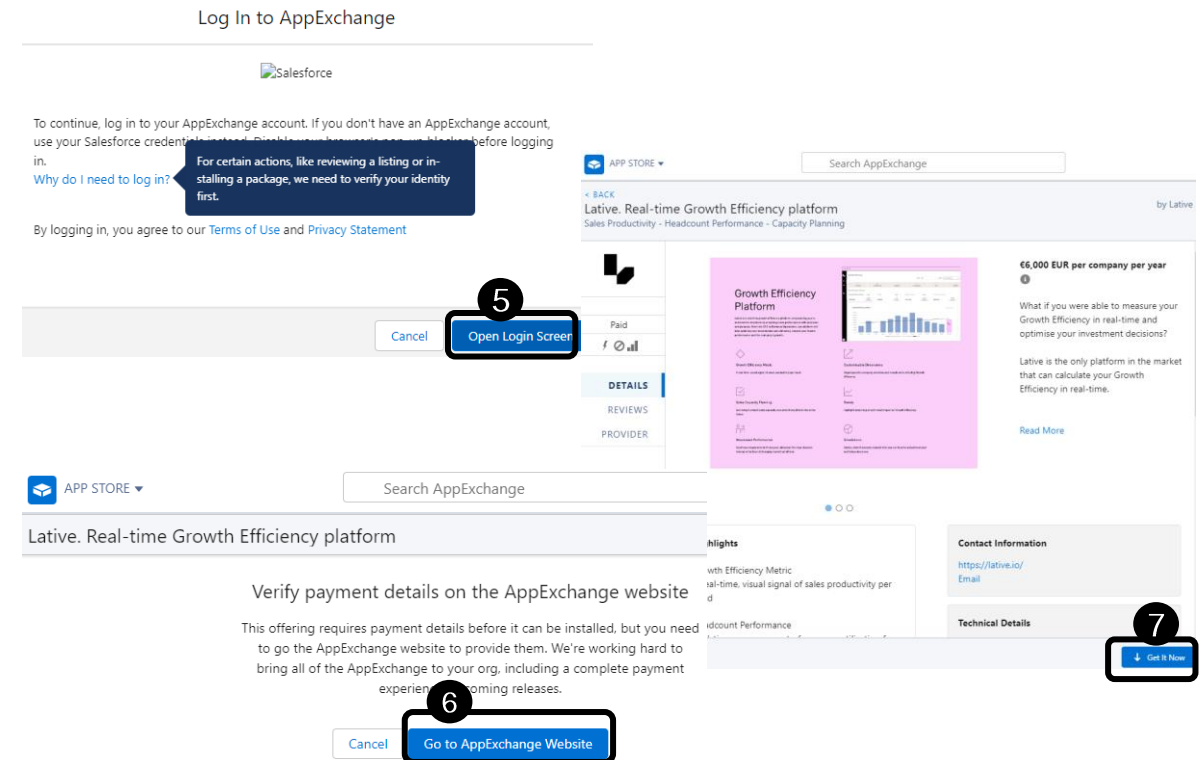
Connect to Salesforce using the admin profile:

1. Go to Salesforce *Setup* menu
2. Search for *Apps* in the Setup search bar and then select *AppExchange Marketplace*
3. Search for *Lative* in the search of the AppExchange window
4. Click on the *Lative* icon



Step 1b. Initiate install from Salesforce Setup

5. Log In to AppExchange – click on Open Login Screen
6. The installation of Lative doesn't require any payment. You just need to *Go to AppExchange Website* to start the installation
7. Click on *Get it now* to start the installation of Lative



Step 2. Define where to install the package

You can install either:

- a. Install in Production
- b. Install in Sandbox



Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

pauline.corpet@lative.devedition

Don't see your account? [More Info](#)

Install In Production

Install in a Sandbox

Test this package in a copy of a production org.

Install In Sandbox

Cancel

Step 3. Confirm installation details

Review and agree to the terms and conditions and click *Confirm and Install*.



Confirm Installation Details

Review the [customization guide](#) for Installation and configuration steps.

Package	Version
Latvie (Autum 2022 / 1.2.0)	Autum 2022 / 1.2.0
Subscription	Organization
Free	Latvie
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
pauline.corpet@latvie.devedtton	

Here are the details we'll share from your profile

Edit Profile

* First Name

Pauline

* Company

Consulting

* Last Name

CORPET

* Country

Spain

Job Title

Customer Operations

State/Province

* Email

pauline.corpet@latvie.io

Phone

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. Is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

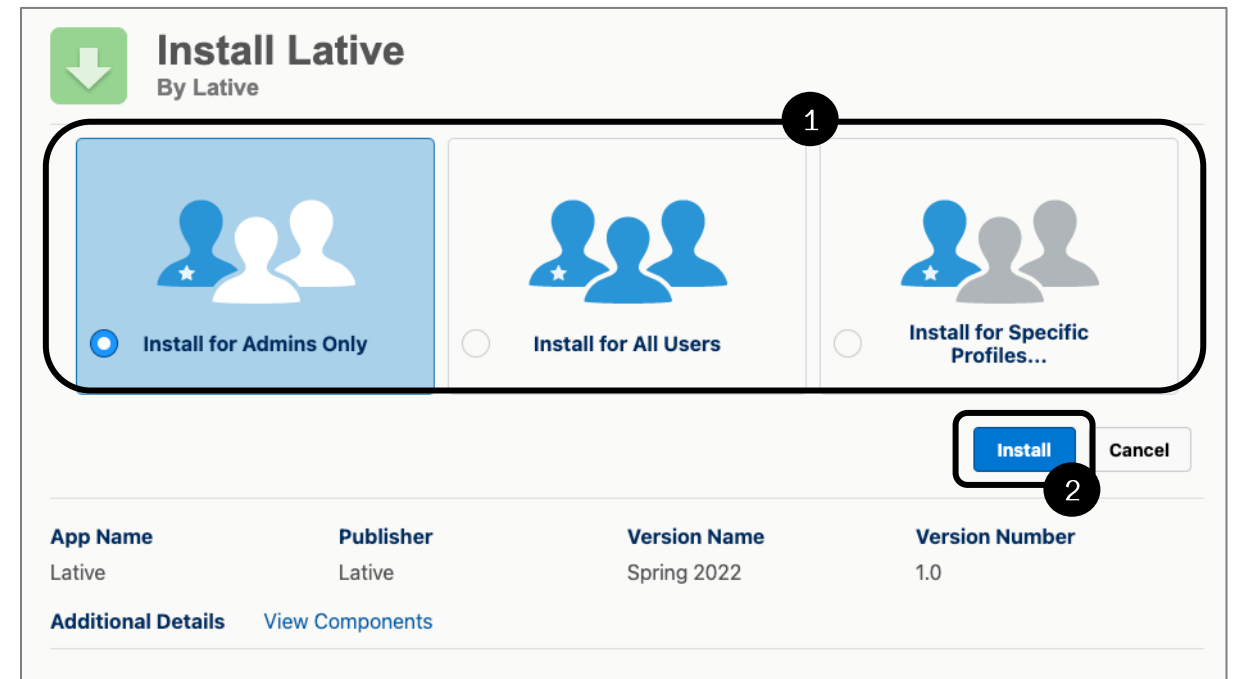
☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel

Confirm and Install

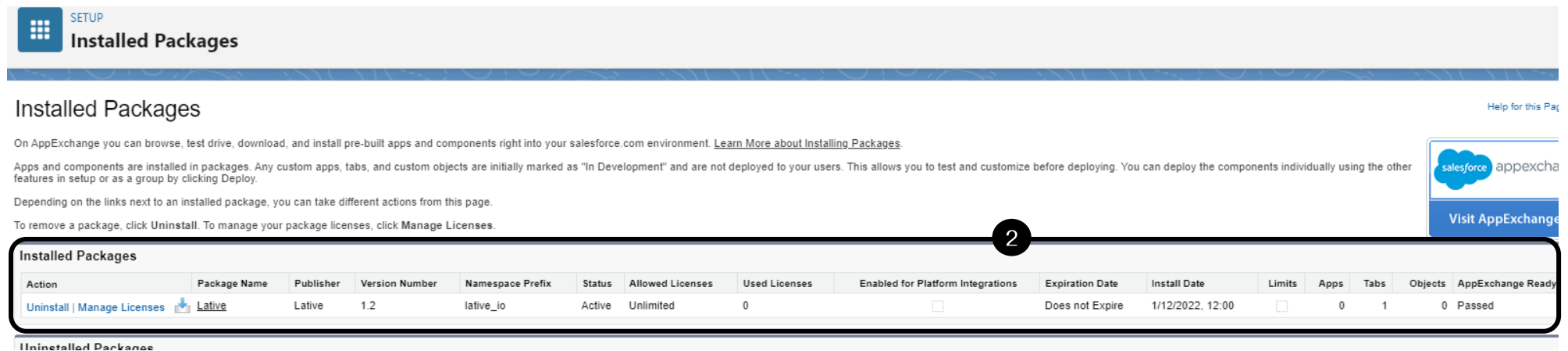
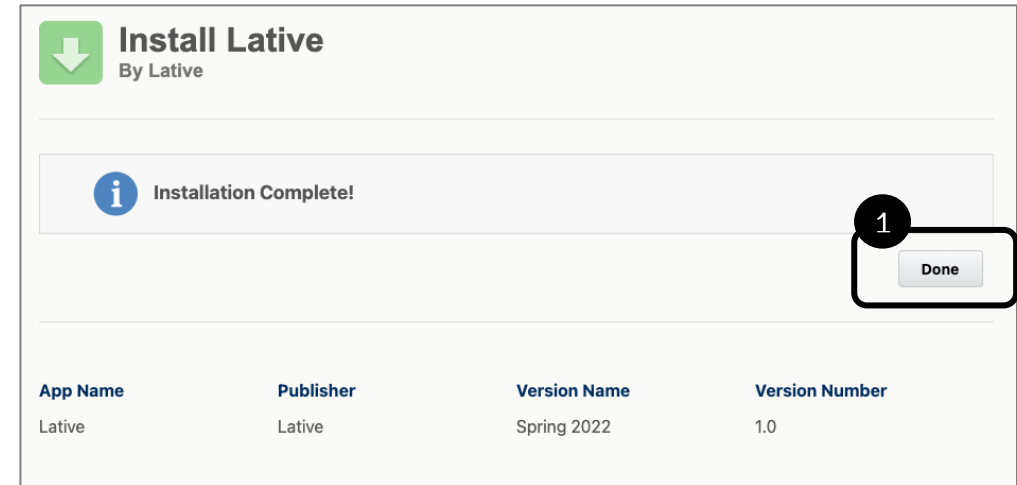
Step 4. Determine the access

1. Determine the limited access to certain profiles and users:
 - To install only for Admins, select the *Install for Admins Only* option,
 - if you don't wish to limit any users, select *Install for All Users*,
 - If you wish to limit access to certain profiles, select *Install for Specific Profiles*.
2. Once you've chosen the access, click on *Install*



Step 5. Install Lative

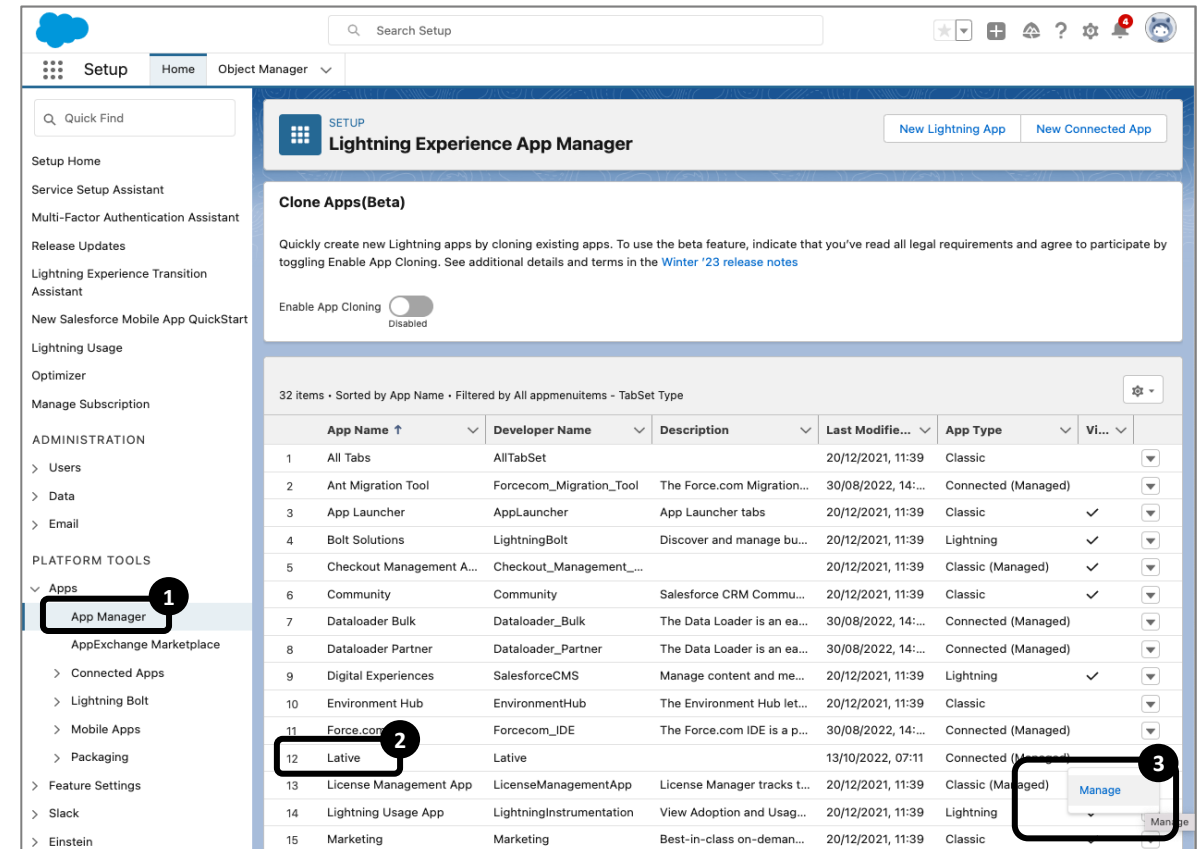
1. After the installation is complete, please click the **Done** button.
2. Lative will be added to the installed packages on Salesforce



Step 6. Access Lative on App Manager

Go to *Setup* on your Salesforce instance:

1. Select *App Manager* from the left menu,
2. Find *Lative* on the list,
3. Then click on the arrow icon and select the *Manage* option for *Lative*.



The screenshot displays the Salesforce Setup interface. The left sidebar contains a navigation menu with the following sections: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, AppExchange Marketplace, Connected Apps, Lightning Bolt, Mobile Apps, Packaging, Feature Settings, Slack, Einstein). The 'App Manager' option under the 'Apps' section is highlighted with a red circle and labeled '1'.

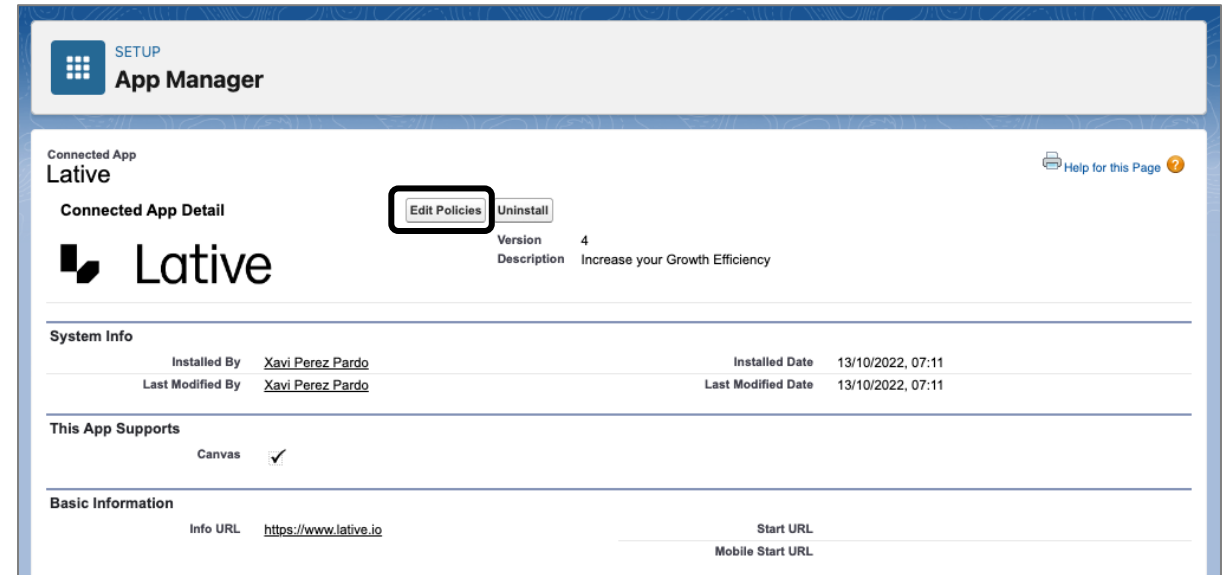
The main content area is titled 'Lightning Experience App Manager'. It includes a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning' (Disabled). Below this is a table of 32 items, sorted by App Name. The table has columns: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Lative' app is highlighted with a red circle and labeled '2'.

The 'Lative' app details are shown below the table, including its description and app type. A 'Manage' button is visible next to the 'Lative' app, highlighted with a red circle and labeled '3'.

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
1	All Tabs	AllTabSet		20/12/2021, 11:39	Classic	
2	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration...	30/08/2022, 14:...	Connected (Managed)	
3	App Launcher	AppLauncher	App Launcher tabs	20/12/2021, 11:39	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage bu...	20/12/2021, 11:39	Lightning	✓
5	Checkout Management A...	Checkout_Management_...		20/12/2021, 11:39	Classic (Managed)	✓
6	Community	Community	Salesforce CRM Commu...	20/12/2021, 11:39	Classic	✓
7	Dataloader Bulk	Dataloader_Bulk	The Data Loader is an ea...	30/08/2022, 14:...	Connected (Managed)	
8	Dataloader Partner	Dataloader_Partner	The Data Loader is an ea...	30/08/2022, 14:...	Connected (Managed)	
9	Digital Experiences	SalesforceCMS	Manage content and me...	20/12/2021, 11:39	Lightning	✓
10	Environment Hub	EnvironmentHub	The Environment Hub let...	20/12/2021, 11:39	Classic	
11	Force.com IDE	Forcecom_IDE	The Force.com IDE is a p...	30/08/2022, 14:...	Connected (Managed)	
12	Lative	Lative		13/10/2022, 07:11	Connected (Managed)	
13	License Management App	LicenseManagementApp	License Manager tracks t...	20/12/2021, 11:39	Classic (Managed)	
14	Lightning Usage App	LightningInstrumentation	View Adoption and Usag...	20/12/2021, 11:39	Lightning	
15	Marketing	Marketing	Best-in-class on-deman...	20/12/2021, 11:39	Classic	

Step 7. Edit Policies for Lative

Please click on the *Edit Policies* button.



The screenshot shows the 'App Manager' interface for a connected app named 'Lative'. The interface includes a header with the 'App Manager' logo and a 'SETUP' button. Below the header, the 'Connected App Detail' section displays the app's name, logo, version (4), and description ('Increase your Growth Efficiency'). The 'Edit Policies' button is highlighted with a red rectangle. To the right of the 'Edit Policies' button is an 'Uninstall' button. Below the 'Connected App Detail' section, the 'System Info' section displays installation details. The 'This App Supports' section shows that the app supports 'Canvas'. The 'Basic Information' section displays the 'Info URL' and 'Start URL'.

App Manager

Connected App
Lative

Connected App Detail

Edit Policies **Uninstall**

Version 4
Description Increase your Growth Efficiency

System Info

Installed By	Xavi Perez Pardo	Installed Date	13/10/2022, 07:11
Last Modified By	Xavi Perez Pardo	Last Modified Date	13/10/2022, 07:11

This App Supports

Canvas	✓
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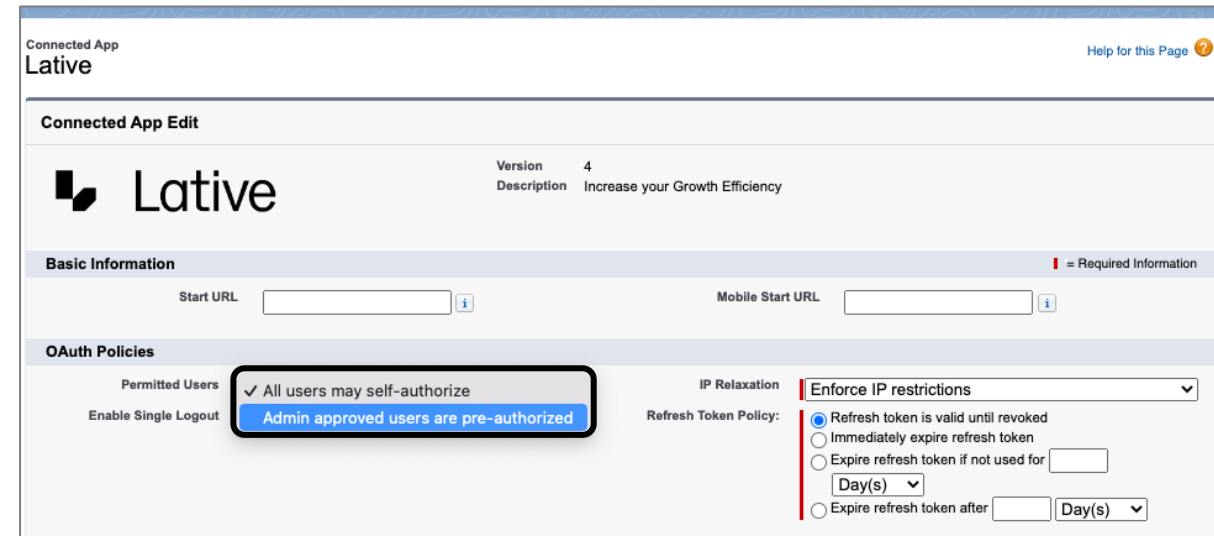
Basic Information

Info URL	https://www.lative.io	Start URL	
		Mobile Start URL	

Step 8. Configure OAuth Policies

Click on the *Permitted Users* dropdown and select

- Admin approved users are pre-authorized
- Then click *Save*



The screenshot displays the 'Connected App Edit' interface for 'Lative'. The page includes a header with the Lative logo, version 4, and description 'Increase your Growth Efficiency'. A 'Help for this Page' link is in the top right. The 'Basic Information' section contains 'Start URL' and 'Mobile Start URL' fields. The 'OAuth Policies' section is highlighted, showing 'Permitted Users' with a dropdown menu. The dropdown menu is open, showing two options: 'All users may self-authorize' (selected) and 'Admin approved users are pre-authorized'. The 'IP Relaxation' section shows a dropdown menu set to 'Enforce IP restrictions'. The 'Refresh Token Policy' section shows three radio button options: 'Refresh token is valid until revoked' (selected), 'Immediately expire refresh token', and 'Expire refresh token if not used for' (with a 'Day(s)' dropdown). The 'Expire refresh token after' option is also visible with a 'Day(s)' dropdown.

Connected App
Lative

Help for this Page

Connected App Edit

Version 4
Description Increase your Growth Efficiency

Basic Information

Start URL Mobile Start URL

OAuth Policies

Permitted Users
Enable Single Logout

✓ All users may self-authorize
Admin approved users are pre-authorized

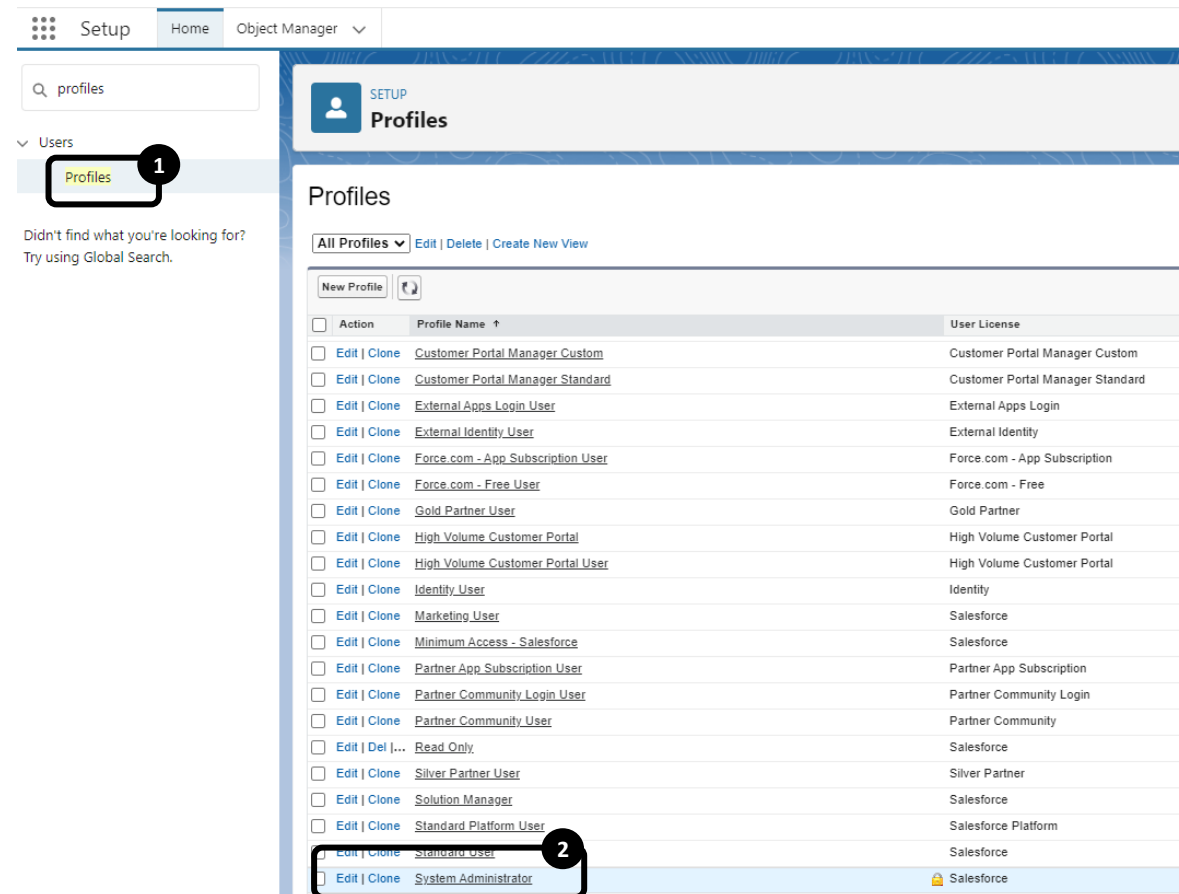
IP Relaxation
Refresh Token Policy:

Enforce IP restrictions

Refresh token is valid until revoked
Immediately expire refresh token
Expire refresh token if not used for Day(s)
Expire refresh token after Day(s)

Step 9. Grant Lative access to Profiles

1. Go back to Setup menu on the left and select *Profiles*
2. Click *Edit* on each profile you want to give Lative access too (here: *System Administrator* profile)



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Setup' menu is selected, and the 'Profiles' option under the 'Users' section is highlighted with a red circle and the number 1. The main content area displays the 'Profiles' page. At the top, there is a search bar with 'profiles' entered. Below the search bar, there is a 'New Profile' button and a table of profiles. The table has columns for 'Action', 'Profile Name', and 'User License'. The 'System Administrator' profile is highlighted at the bottom of the table with a red circle and the number 2.

Action	Profile Name	User License
Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom
Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard
Edit Clone	External Apps Login User	External Apps Login
Edit Clone	External Identity User	External Identity
Edit Clone	Force.com - App Subscription User	Force.com - App Subscription
Edit Clone	Force.com - Free User	Force.com - Free
Edit Clone	Gold Partner User	Gold Partner
Edit Clone	High Volume Customer Portal	High Volume Customer Portal
Edit Clone	High Volume Customer Portal User	High Volume Customer Portal
Edit Clone	Identity User	Identity
Edit Clone	Marketing User	Salesforce
Edit Clone	Minimum Access - Salesforce	Salesforce
Edit Clone	Partner App Subscription User	Partner App Subscription
Edit Clone	Partner Community Login User	Partner Community Login
Edit Clone	Partner Community User	Partner Community
Edit Del ...	Read Only	Salesforce
Edit Clone	Silver Partner User	Silver Partner
Edit Clone	Solution Manager	Salesforce
Edit Clone	Standard Platform User	Salesforce Platform
Edit Clone	Standard User	Salesforce
Edit Clone	System Administrator	Salesforce

Step 9. Grant Lative access to Profiles

- Once on the profile, tick the *Lative* connected app to grant access.

Profile Edit
System Administrator

Set the permissions and page layouts for this profile.

Profile Edit [Save] [Save & New] [Cancel]

Name System Administrator
User License Salesforce Custom Profile ☐

Custom App Settings ! = Required Information

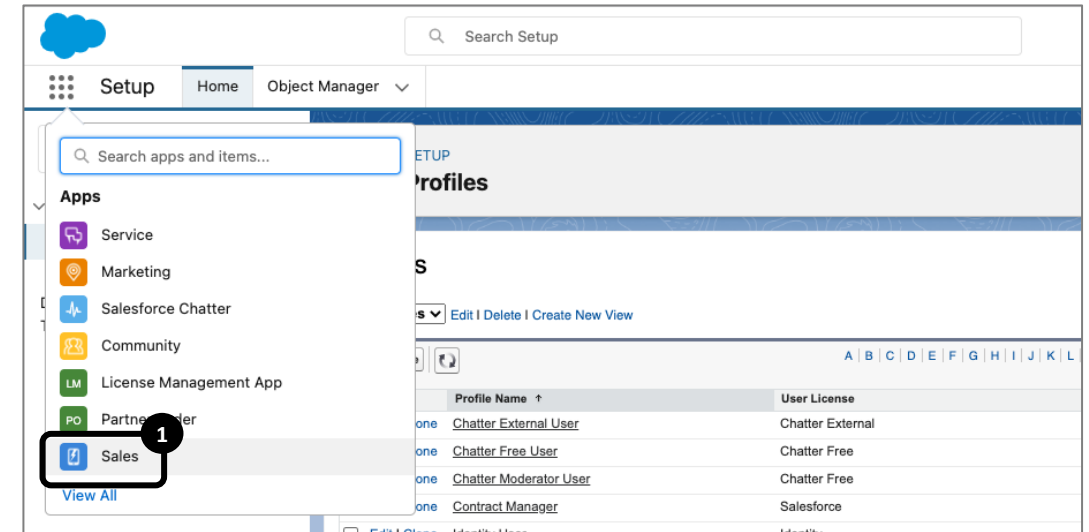
	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	☐	☐	Partner Marketing Library Setup (KPlapp__Setup)	☒	☐
App Launcher (standard__AppLauncher)	☒	☐	Partner Order (CHANNEL_ORDERS__Partner_Order)	☒	☐
Bolt Solutions (standard__LightningBolt)	☒	☐	Sales (standard__LightningSales)	☒	☐
Checkout Management App (sfcm__Checkout_Management_App)	☒	☐	Sales (standard__Sales)	☒	☒
Community (standard__Community)	☒	☐	Sales Console (standard__LightningSalesConsole)	☒	☐
Digital Experiences (standard__SalesforceCMS)	☒	☐	Salesforce Chatter (standard__Chatter)	☒	☐
Environment Hub (standard__EnvironmentHub)	☒	☐	Sample Console (standard__ServiceConsole)	☐	☐
License Management App (sflma__LicenseManagementApp)	☒	☐	Service (standard__Service)	☒	☐
Lightning Usage App (standard__LightningInstrumentation)	☒	☐	Service Console (standard__LightningService)	☒	☐
Marketing (standard__Marketing)	☒	☐	Your Account (standard__OnlineSales)	☒	☐
Partner Marketing Library (KPlapp__Partner_Marketing_Library)	☒	☐	ZoomInfo (DOZISF__ZoomInfo)	☒	☐

Connected App Access

Ant Migration Tool	☐	PartnerTrial	☐
Dataloader Bulk	☐	Salesforce for Outlook	☐
Dataloader Partner	☐	Salesforce Mobile Dashboards	☐
Force.com IDE	☐	Salesforce Touch	☐
Lative	☒	Workbench	☐

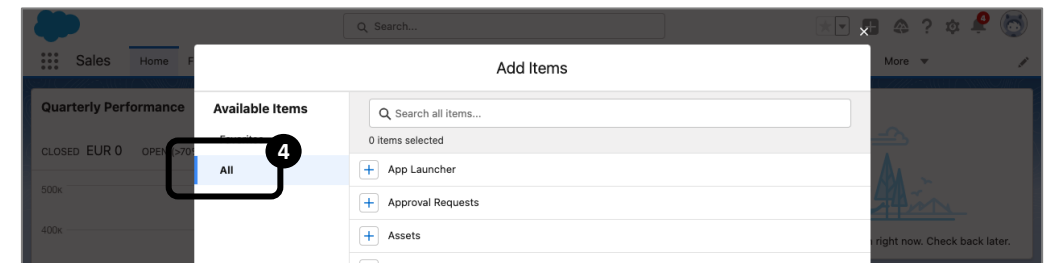
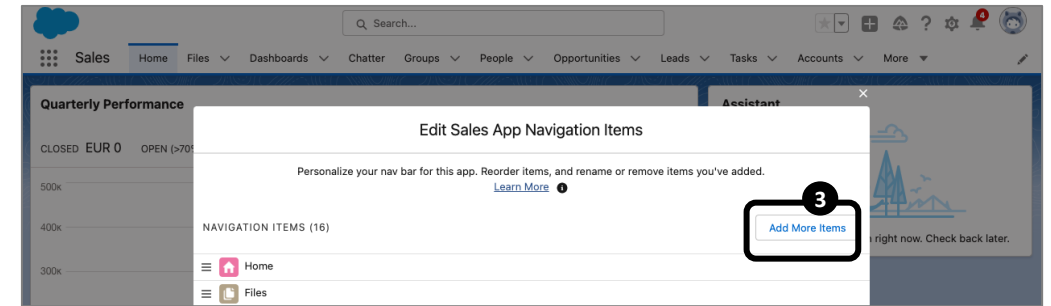
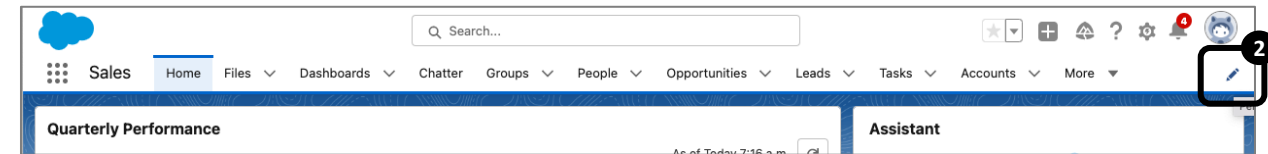
Step 10. Add Lative Tab to an App

1. Click on the App Selector, on the top left icon, and select the App where app you want to add Lative (here: the Sales App)



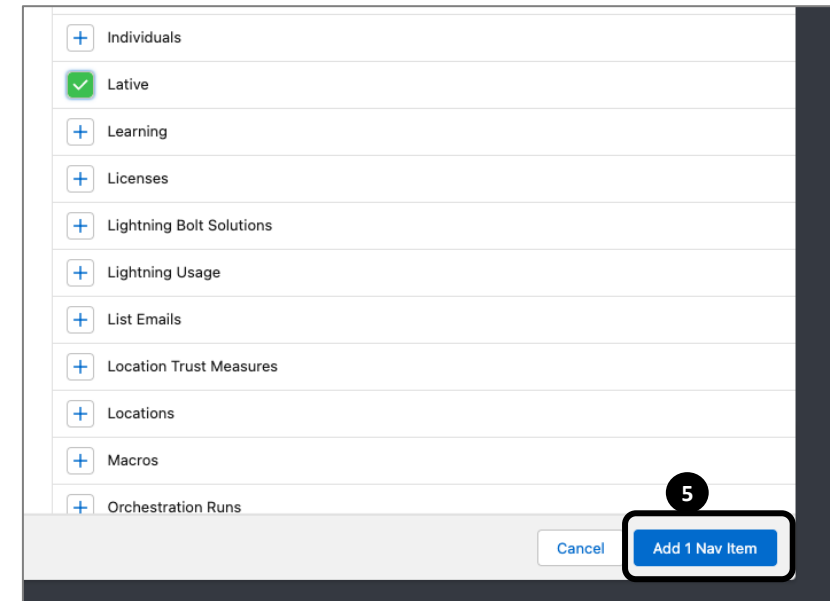
Step 10. Add Lative Tab to an App

2. Now, click on the top right *pen icon* to edit the navigation bar.
3. Click the **Add More Items** button on the top right of the modal.
4. Then click **All** on the left menu and select Lative from the list.



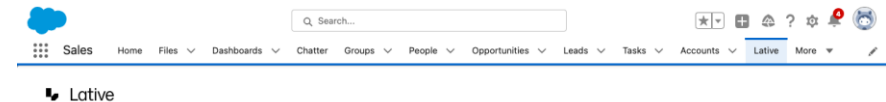
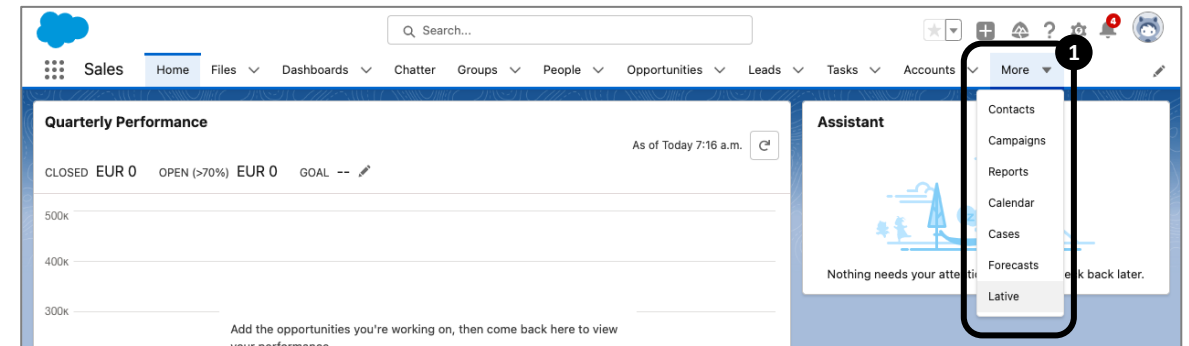
Step 10. Add Lative Tab to Sales App

5. Once selected, click the *Add 1 Nav Item* button to add Lative to the navigation bar and then click the *Save* button.



Step 11. Access Lative through new Tab

1. Click on the top right *Lative* tab or click on the *More* dropdown to find the tab.
2. Lative will validate your configuration and display the following welcome screen.



2

Welcome to Lative!

Our team will contact you shortly to help you configure your Lative account.

Step 12. Onboarding call with Lative



You will receive an email to schedule a 30 min call in order to verify the configuration and confirm your business dimensions.

If you have any question, please send an email to
pauline.corpet@lative.io



Thanks you!