

CloudMJ Cultivate for Salesforce

Admin Guide

CLOUD | MJ



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Install CloudMJ Cultivate Package

1. From AppExchange Listing or once CloudMJ has provided the install URL, you first will see this **Install CloudMJ Cultivate** screen.

Select option: **Install for All Users**, then the click **Install** button

App Name	Publisher	Version Name	Version Number
CloudMJ Cultivate	CloudMJ KTB Structured Solutions, LLC	ver 0.3	0.3

[Additional Details](#) [View Components](#)

2. Click on the checkbox **'Yes, grant access to these third-party web sites'** then select **Continue** button

Website	SSL Encrypted
api-ca.metro.com	☒
api-co.metro.com	☒

☒ Yes, grant access to these third-party web sites

Click Here [Continue](#) [Cancel](#)

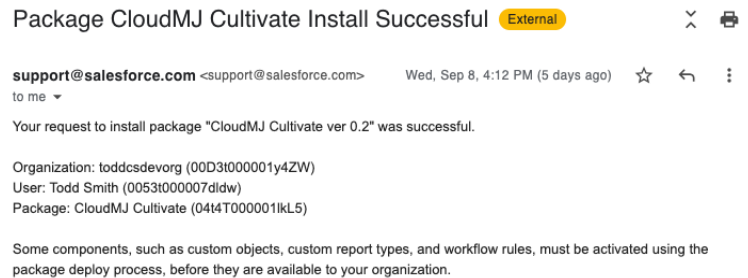
3. Installing the application may take a few minutes. Salesforce will prompt Summer 23 (Version 0.4)

This app is taking a long time to install.
You will receive an email after the installation has completed.

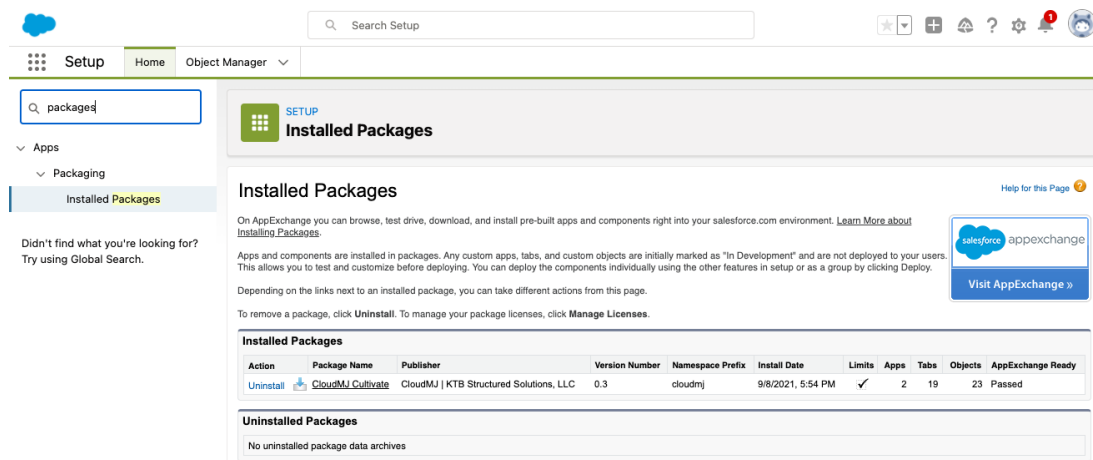
[Done](#)

you with **‘This app is taking a long time to install’** message if installation is taking extra time.

Also if installation is taking extra time, you will receive an email from Salesforce (support@salesforce.com) with subject line **“Package CloudMJ Cultivate Install Successful”** once the installation of CloudMJ Cultivate is complete.



4. Once CloudMJ Cultivate is installed it will be visible in the **Setup** menu. To view go **Setup -> Apps -> Packaging -> Installed Packages** (or in Setup type **Packages**)



Permission Set Assignments

CloudMJ comes packaged with four Permission Sets:

- **CloudMJ Admin** | For use by Salesforce Admins and CloudMJ Power Users
- **CloudMJ Users** | For use by standard CloudMJ users
- **CloudMJ Orders & Products** | Assigned to users who are managing Orders and Products with CloudMJ Cultivate app.

- **CloudMJ Activate Orders** | Assigned to users who need the ability to activate Orders, used in conjunction with CloudMJ Cultivate app.

CloudMJ Admin Permission Set

CloudMJ Admin Permission Set grants permission/access to the **CloudMJ Metric Admin** app as well as the **CloudMJ Cultivate** app

From Setup menu go **Users > Permission Sets** > select **CloudMJ Admin** from list of **Permission Sets**

Once on CloudMJ Admin Permission Set record select **Manage Assignments**

On next screen select the User(s) you want to assign as CloudMJ Admin then select the **Add Assignments** button

You can also remove User from the CloudMJ Admin Permission Set using the **Manage Assignments** button > select the User(s) to remove from Permission Set then select the **Remove Assignments** button

CloudMJ User Permission Set

CloudMJ User Permission Set grants permission/access to the **CloudMJ Cultivate** app

From Setup menu go **Users > Permission Sets** > select **CloudMJ User** from list of **Permission Sets**

Once on **CloudMJ User** Permission Set record select **Manage Assignments**

On next screen select the User(s) you want to assign as CloudMJ Users then select the **Add Assignments** button

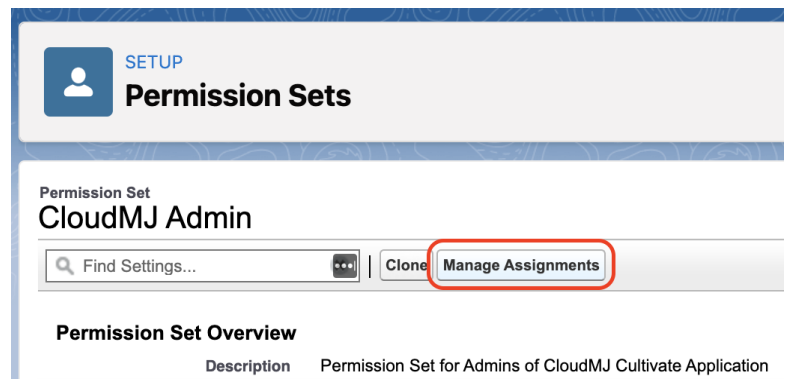
You can also remove User from the CloudMJ User Permission Set using the **Manage Assignments** button > select the User(s) to remove from Permission Set then select the **Remove Assignments** button

CloudMJ Orders Related Permission Sets

The **CloudMJ Orders & Products** Permission Set is assigned to users who are managing Orders and Products with CloudMJ Cultivate app.

The **CloudMJ Activate Orders** Permission Set is assigned to users who need the ability to activate Orders, used in conjunction with CloudMJ Cultivate app.

Summer 23 (Version 0.4)

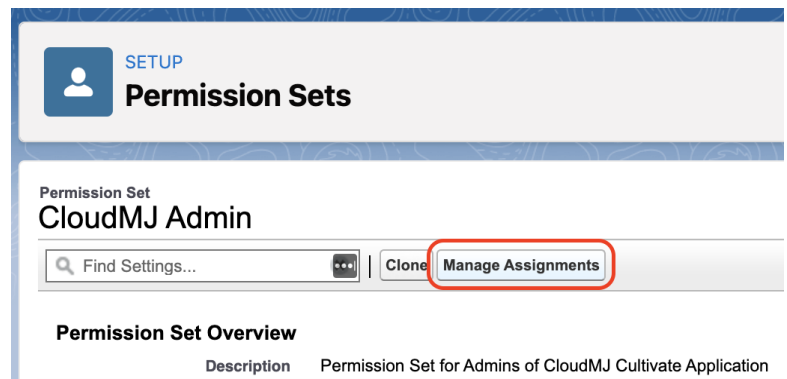


From Setup menu go **Users > Permission Sets > select CloudMJ User** from list of **Permission Sets**

Once on **CloudMJ User** Permission Set record select **Manage Assignments**

On next screen select the User(s) you want to assign as CloudMJ Users then select the **Add Assignments** button

You can also remove User from the CloudMJ User Permission Set using the **Manage Assignments** button > select the User(s) to remove from Permission Set the select the **Remove Assignments** button



Page Layout Assignments

CloudMJ comes packaged with Page Layouts for some Objects to save Admins time creating page layouts for CloudMJ. Objects with custom Page Layouts for CloudMJ are:

- **Account**
- **Orders**
- **Order Product**
- **Product**

Assigning Page Layout

Go to Setup -> Object Manager

Search for **Order** Objects

On **Order** Object details select **Page Layouts** in the left nav bar

On **Page Layout** page select **Page Layout Assignment** button (top right)

On **Layout Assignment** page select the **Edit Assignment** button

In the **Primary Layout Layout** drop down, change value from **System Default** to **CloudMJ Order Layout** for the Profiles you want to see CloudMJ pages by default.

Repeat for: Order Product, Product, Account

Compact Layout Assignments

CloudMJ comes packaged with Compact Layouts which need to be assigned to Objects:

- **Account**

- **Orders**
- **Product**

Assigning Compact Layout

Go to **Setup -> Object Manager**

Go to **Setup -> Object Manager**

Search for **Order** Objects

On **Order** Object details select **Compact Layouts** in the left nav bar

On **Compact Layout** page select **Compact Layout Assignment** button (top right)

On **Compact Layout Assignment** page select the **Edit Assignment** button

In the **Primary Compact Layout** drop down, change value from **System Default** to **CloudMJ Order Layout** for the Profiles you want to see CloudMJ pages by default.

Repeat for the other Objects: Account, Product

The screenshot shows the Salesforce Setup interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. Below the tabs, the breadcrumb trail is 'SETUP > OBJECT MANAGER' followed by 'Order'. The left sidebar contains a list of options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, **Compact Layouts** (highlighted), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, and Validation Rules. The main content area is titled 'Order Compact Layouts' and 'Compact Layout Assignment'. It features a 'Save' and 'Cancel' button at the top right. Below this, the 'Primary Compact Layout' section is highlighted. It contains the instruction: 'Select the compact layout to use when this object's records appear as list items in the mobile app.' The 'Primary Compact Layout' dropdown is set to 'CMJ Order Compact'. At the bottom, there are 'Save' and 'Cancel' buttons.

Now repeat this for the **Orders Product** Object

Go to **Setup -> Object Manager**

Search for **Order Product** Objects

Summer 23 (Version 0.4)

On **Order Product** Object details select **Compact Layout** in the left nav bar
On **Compact Layout** page select **Compact Layout Assignment** button
On **Compact Layout Assignment** page select the **Edit Assignment** button
In the **Primary Layout Layout** drop down, change value from **System Default** to **CloudMJ**
Order Product Compact Layout

Order Status Customization

CloudMJ uses Statuses on the Order Object for Order entry and fulfillment related features.

Customization the Order Status field

Go to Setup -> Object Manager

Search for **Order** Objects

On **Order** Object details select **Fields and Relationships** in the left nav bar

On **Fields and Relationships** scroll down to the **Status** field and select it

On the **Status** field detail page scroll down **Order Status Picklist Values** and select **New**

Add and re-order the following Statuses and set the **Status Category** for all these to: **Activated**

- **Submitted** (API name: Submitted)
- **In Process** (API name: In Process)
- **Ready to Ship** (API name: Ready to Ship)
- **Pending Payment** (API name: Pending Payment)
- **Completed** (API name: Completed)

Also **Deactivate** the **Status = Activated** after creating the Statuses above

So the order of Statuses will look like the following:

- **Draft**
- **Submitted**
- **In Process**
- **Ready to Ship**
- **Pending Payment**
- **Completed**

Order Status Picklist Values				New	Reorder	Replace	Printable View
Action	Values	API Name	Status Category				
Edit Del Deactivate	Draft	Draft	Draft				
Edit Del Deactivate	Submitted	Submitted	Activated				
Edit Del Deactivate	In Process	In Process	Activated				
Edit Del Deactivate	Ready to Ship	Ready to Ship	Activated				
Edit Del Deactivate	Pending Payment	Pending Payment	Activated				
Edit Del Deactivate	Completed	Completed	Activated				

Facility Setup

CloudMJ with Metrc integration requires associating Accounts with Facilities which sync with Metrc.

For Facilities you and customer Facilities which will be either Shipping or Receiving Packages, an Account record must exist in CloudMJ/Salesforce and be associated to the Shipping/Receiving Facility.

To do this go to the Facility record and enter the Account name (you can create the Account here or create the Accounts under the Account Tab prior to associating them to the Facility.

While adding the Account to the Facility the Metrc integration must also have a Phone number and Address on the Facility record. So while adding the Account to the Facility be sure to also on the Facility record to enter its address and a phone number.

CloudMJ

CMJ Cultivate Admin CMJ Cultivate Settings Facilities Logs Queue Items

Facility
KGBI COLORADO LLC

Details Related

Details

* Facility Name
KGBI COLORADO LLC

Facility License Type
Medical Marijuana Cultivation

Affiliation
Affiliated

Credentialed Date
10/14/2016

REC Plant Allowance

Is Medical
☒

MED Plant Allowance

Owner Company
Search Accounts...
+ New Account

Address Line 1

Address Line 2

City

State
Colorado

Postal Code

Price Book and Price Book Entries

CloudMJ Order Management with Metrc integration requires creating a Price Book and associating Products with the Price Book(s).

[Here are steps](#) for creating a Standard Price Books.

[Here is more information](#) about Price Books, Product and Orders in Salesforce

Contact CloudMJ if additional information and assistance is needed.

Metrc Data Setup

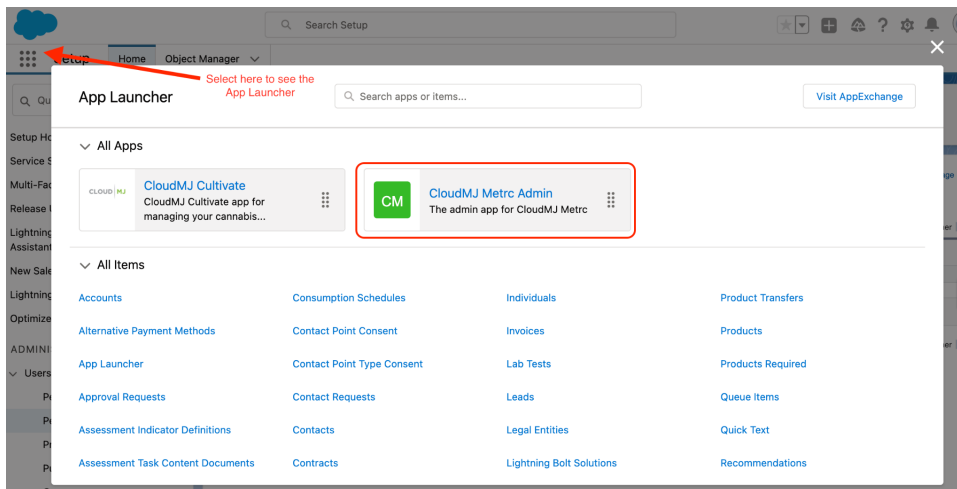
Prerequisites

Item	Timing	Notes
Active Metrc Account and User Key	Pre-Install	The API User Key Can be generated by a Licensee <i>when logged into Metrc</i> by clicking on their user name in the upper right of the web page, and selecting API KEYS, and then Generate Key

		The best practice is to have the System Admin/Key Admin generate the key as they have full permissions. If the syncing user for a facility is not a Key Admin, CloudMJ will not be able to sync your data, or at least not all of it. If you are a Metrc customer and need assistance with this or any other support inquiry, the licensee can contact Metrc at support@metrc.com or by phone at 1-877-566-6506 Example: User Key: FusVbe4Yv6W1DGNuxKNhByXU6RO6jSUPcbRCoRDD98V NXc4D
API	Pre-Install	
User Credentials	Pre-Install	User needs a Salesforce instance with login credentials and assigned the Profile System Admin
Permissions	Post-Install	Assigned the CloudMJ Admin Permission Set

Metrc Admin App

Assuming the user has **CloudMJ Admin** Permission Set assigned, from the Salesforce App Launcher select **CloudMJ Metrc Admin** from the All Apps menu



The Metrc Authentication page displays and here you will enter your:

- Metrc State - select from the drop down | example Colorado
- Metrc User Key

Leave the **“Connect to Metrc Sandbox”** unchecked

Summer 23 (Version 0.4)

CloudMJ Metrc Ad... Metrc Authentication Logs Queue Items

Metrc Authentication

Metrc Auth Config

* State
Select A State
California
Colorado

☐ Connect to a Metrc Sandbox?

Submit

Retrieve Facilities

* State
Select A State

☐ Connect to a Metrc Sandbox?

Sync Facilities

Select **Submit** button and you will receive a success toast

Metrc Authentication Success

Metrc Auth Config

* Enter a 2-digit state code
CA

* Enter your metrc user key
FusVbe4Yv6W1DGNuxKNhByXU6RO6jSUPcbRCoRDD98VNXc4D

☐ Connect to a Metrc Sandbox?

Submit

Retrieve Facilities

* Enter a 2-digit state code

☐ Connect to a Metrc Sandbox?

Sync Facilities

Next under Retrieve Facilities enter your 2-Digit Metrc State again (example: CO)

Leave the “**Connect to Metrc Sandbox?**” unchecked

Select **Sync Facilities** button and you will receive a success toast

**If you receive any errors please reach out to CloudMJ Support at: support@cloudmj.com

Facilities Sync

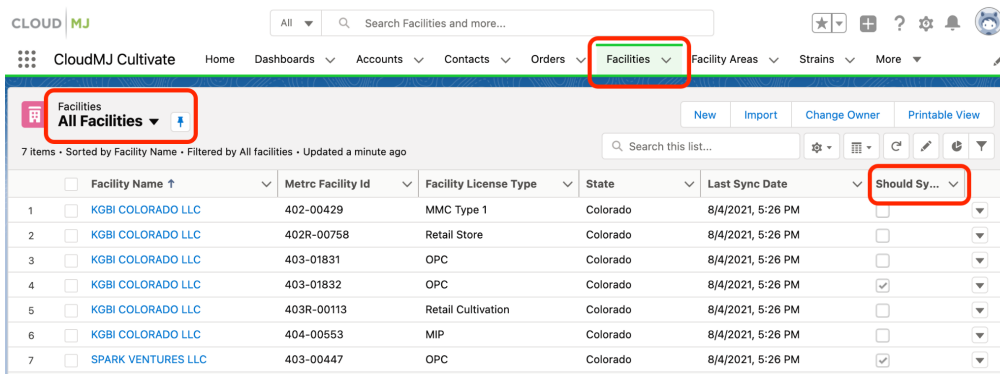
Once you have retrieved your Facilities as part of step 2 in the Metrc Admin App the final step to start pulling your Metrc data into CloudMJ Cultivate/Salesforce is to select which Facilities to import Metrc data for.

To do this:

Step 1: Go to the App Launcher and select **CloudMJ Cultivate** app.

Step 2: Select the **Facilities** tab

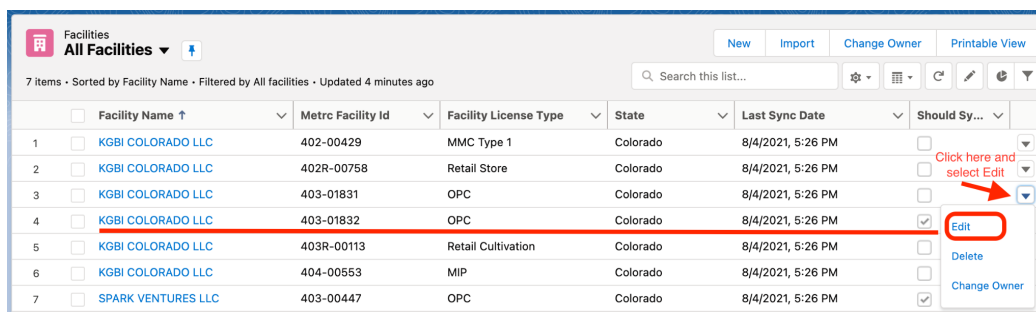
Step 3: Select the List View: **All Facilities**



☐	Facility Name ↑	Metrc Facility Id	Facility License Type	State	Last Sync Date	Should Sy...
1	☐ KGBI COLORADO LLC	402-00429	MMC Type 1	Colorado	8/4/2021, 5:26 PM	☐
2	☐ KGBI COLORADO LLC	402R-00758	Retail Store	Colorado	8/4/2021, 5:26 PM	☐
3	☐ KGBI COLORADO LLC	403-01831	OPC	Colorado	8/4/2021, 5:26 PM	☐
4	☐ KGBI COLORADO LLC	403-01832	OPC	Colorado	8/4/2021, 5:26 PM	☒
5	☐ KGBI COLORADO LLC	403R-00113	Retail Cultivation	Colorado	8/4/2021, 5:26 PM	☐
6	☐ KGBI COLORADO LLC	404-00553	MIP	Colorado	8/4/2021, 5:26 PM	☐
7	☐ SPARK VENTURES LLC	403-00447	OPC	Colorado	8/4/2021, 5:26 PM	☒

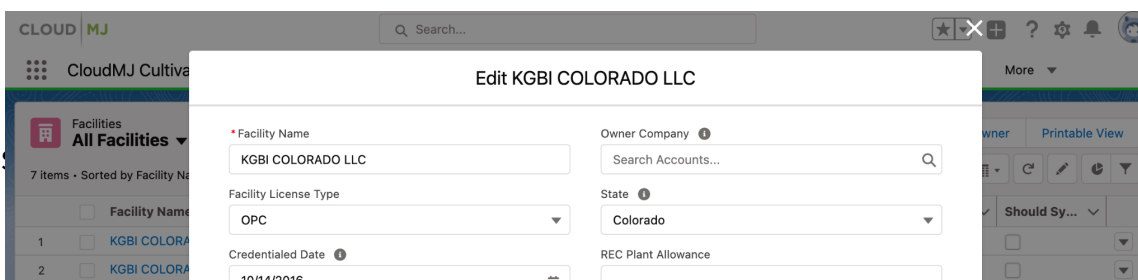
Step 4: Determine a Facility for which you want to start importing your Metrc data from.

Step 5: Select the drop down arrow at the end of the row for the Facility you've selected and choose **Edit** from the menu



☐	Facility Name ↑	Metrc Facility Id	Facility License Type	State	Last Sync Date	Should Sy...
1	☐ KGBI COLORADO LLC	402-00429	MMC Type 1	Colorado	8/4/2021, 5:26 PM	☐
2	☐ KGBI COLORADO LLC	402R-00758	Retail Store	Colorado	8/4/2021, 5:26 PM	☐
3	☐ KGBI COLORADO LLC	403-01831	OPC	Colorado	8/4/2021, 5:26 PM	☐
4	☐ KGBI COLORADO LLC	403-01832	OPC	Colorado	8/4/2021, 5:26 PM	☒
5	☐ KGBI COLORADO LLC	403R-00113	Retail Cultivation	Colorado	8/4/2021, 5:26 PM	☐
6	☐ KGBI COLORADO LLC	404-00553	MIP	Colorado	8/4/2021, 5:26 PM	☐
7	☐ SPARK VENTURES LLC	403-00447	OPC	Colorado	8/4/2021, 5:26 PM	☒

Step 6: On the Edit modal showing the Facility details, check (enable) the checkbox for field **Should Sync with Metrc** then select **Save** button



CloudMJ Cultivate

Search...

Facilities

All Facilities

7 items • Sorted by Facility Name • Filtered by All facilities • Updated 4 minutes ago

Search this list...

Facility Name ↑

Metrc Facility Id

Facility License Type

State

Last Sync Date

Should Sy...

1 ☐ KGBI COLORADO LLC 402-00429 MMC Type 1 Colorado 8/4/2021, 5:26 PM ☐

2 ☐ KGBI COLORADO LLC 402R-00758 Retail Store Colorado 8/4/2021, 5:26 PM ☐

3 ☐ KGBI COLORADO LLC 403-01831 OPC Colorado 8/4/2021, 5:26 PM ☐

4 ☐ KGBI COLORADO LLC 403-01832 OPC Colorado 8/4/2021, 5:26 PM ☒

5 ☐ KGBI COLORADO LLC 403R-00113 Retail Cultivation Colorado 8/4/2021, 5:26 PM ☐

6 ☐ KGBI COLORADO LLC 404-00553 MIP Colorado 8/4/2021, 5:26 PM ☐

7 ☐ SPARK VENTURES LLC 403-00447 OPC Colorado 8/4/2021, 5:26 PM ☒

Edit

Delete

Change Owner

Owner Company

Search Accounts...

State

Colorado

Credentialed Date

10/14/2016

REC Plant Allowance

Save

Repeat this for the other

Facilities you want to have Metrc data sync'd with CloudMJ Cultivate/Salesforce.

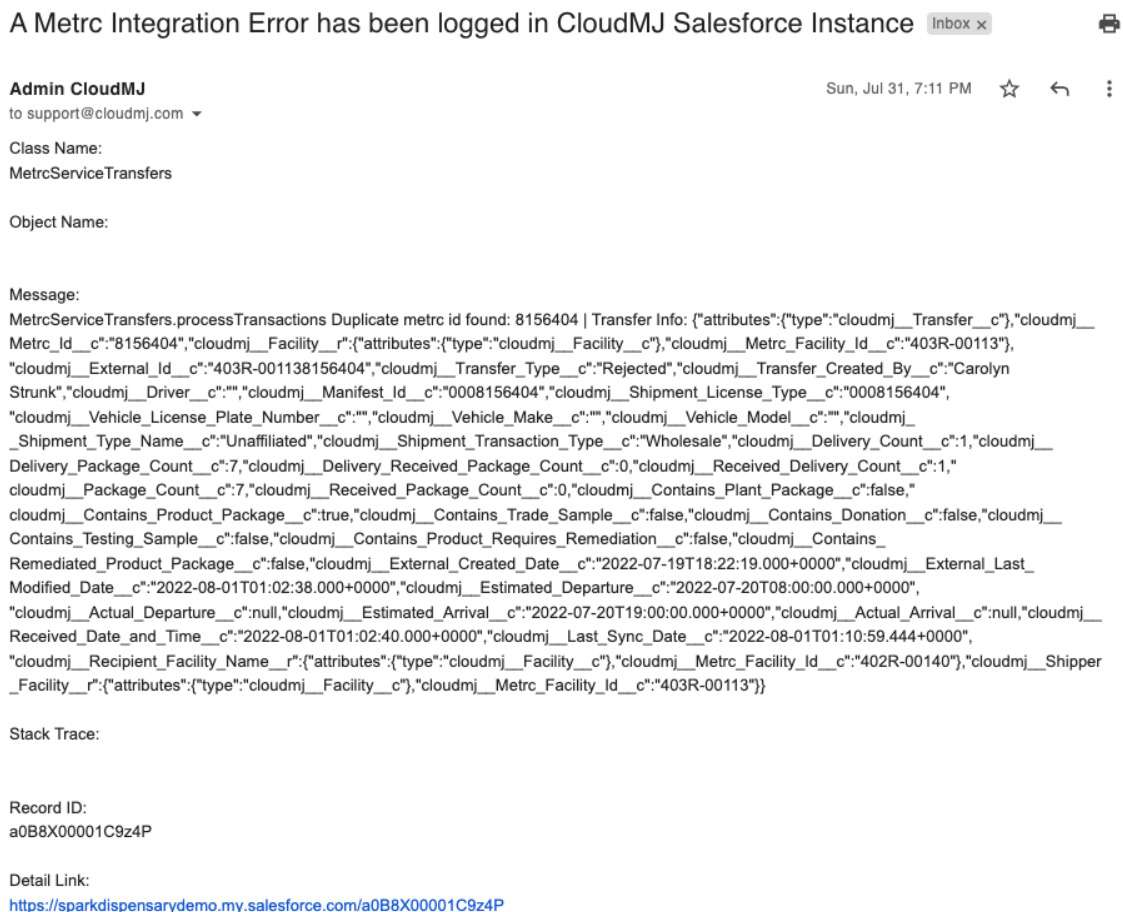
Flow Setup for Integration Alerts

Using Salesforce's powerful Flows tool, key stakeholders can be alerted when the integration with Metrc encounters issues or is down altogether.

Go to **Setup -> Process Automation -> Flows** and select **New Flow** (top right)

On **New Flow** modal select **Autolaunched Flow** (No Trigger) then **Create** button

Sample of the Email Notification



Apex Exceptions Notifications Setup

CloudMJ Support Team and Salesforce Admins can receive notifications when CloudMJ's Apex code encounters unhandled exceptions. Emails can be sent to your Salesforce org's users and to external email addresses.

Go to **Setup -> Email -> Apex Exception Email**

In **External Email Addresses** field enter support@cloudmj.com as select **Save**

For Admin and other users to be alerted select **Add Salesforce User** button and use the lookup to add users within the Salesforce org who will also be alerted.

Install CloudMJ Analytics Extension Package

CloudMJ has a free Analytics Extension which can be installed from the url below. This Analytics Extension Package comes with 3 Dashboards and numerous reports.

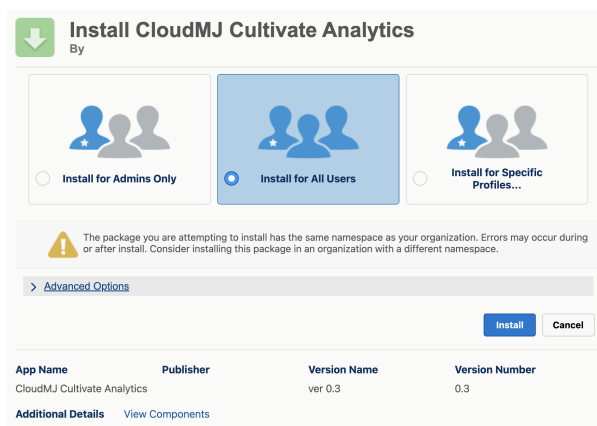
Installation URL: [/packaging/installPackage.apexp?p0=04t4T000001y6Z2QAI](https://my.domain.salesforce.com/packaging/installPackage.apexp?p0=04t4T000001y6Z2QAI)

- Paste the URL above after your domain info. ex
<http://my.domain.salesforce.com/packaging/installPackage.apexp?p0=04t4T000001y6Z2QAI>

Once you install the extension package you can locate the Dashboards in a Dashboard Folder named: **CloudMJ Dashboards**

Reports are under folders named:

- **CloudMJ Grower Reports**
- **CloudMJ Processor Reports**
- **CloudMJ Sales and Orders Reports**



From the install URL above, you first will see this **Install CloudMJ Cultivate Analytics** screen.

Select option: **Install for All Users**, then the click **Install** button

Installing the application may take a few minutes. Salesforce will prompt you with **‘This app is taking a long time to install’** message if installation is taking extra time.

Also if installation is taking extra time, you will receive an email from Salesforce (support@salesforce.com) with subject line “**Package CloudMJ Cultivate Analytics Install Successful**” once the installation of CloudMJ Cultivate is complete.

Additional Setup Items For Consideration

Enable History Tracking for Standard Salesforce Objects

Field History Tracking is a Salesforce feature which can be enabled on Standard Salesforce Objects like Accounts, Contacts, Orders, Order Products, Products and Price Books.

Field History Tracking is already enabled on CloudMJ custom Objects (ex. Strain, Plant, Package). However for Standard Objects Salesforce does not allow packaging of this setting for Standard Objects.

Modifying any of these fields adds an entry to the History related list. All entries include the date, time, nature of the change, and who made the change. Not all field types are available for historical trend reporting.

Salesforce starts tracking field history from the date and time that you enable it on a field. Changes made before this date and time aren't included and didn't create an entry in the History related list.

Instructions for setting up Field History Tracking on a Standard Object are [outlined here](#).

Turn on Login As Feature

Troubleshooting, reproducing errors, and testing are all vital to your success as an admin and will help CloudMJ Support if needed. Thankfully, Salesforce has Login As in your toolkit.

With Login As, you're able to, well, Login As another user. In production, Login As is fantastic for reproducing errors or better understanding an issue that an end user has raised.

A helpful tip: All the changes you make while logged in as another user are captured in the setup audit log. This will allow you to clearly see whether a user made a change or if someone was logged in as that user.

To enable go to **Setup > Security > Login Access Policies** > enable the checkbox for **Administrators Can Log in as Any User**

Analytics App Enablement

Analytics Home is the home base for your Lightning reports and dashboards. The Analytics Home is where all your Salesforce analytics content is organized in a cohesive and seamless experience. You get the benefit of a powerful search experience, better organization, and more.

From **Setup**, in the Quick Find box, enter **reports**, and then select **Reports and Dashboards Settings**.

Select checkbox for **Enable the Unified Experience for Analytics Home**.

From the **App Launcher**, select **Analytics**.

You can also get this feature by enabling it in Analytics settings. The feature is disabled when it's turned off in Analytics settings.

Next is adding the **Analytics App** to the App Launcher. Go to **Setup -> App Manager ->** select the App(s) you want to add the **Analytics** app to (use the Edit action)

On **App Settings** update wizard, (1) select the **Navigation Items** from left navigation.

Then (2) search for **Analytics** in the **Available Items** search box. Last (3) select **Analytics** in the results and use the **add arrow** to add it to the Tab list.

Lightning Experience on iPad Safari

From **Setup ->** enter **New Salesforce Mobile App Quickstart**

Scroll down to section: **Tablet App Experience** and select option for **Lightning on Tablet** (recommended) and **Save**

User Access and Permission Assistant

User Access and Permissions Assistant is a fully supported tool provided by Salesforce to allow our customers to understand, analyze, and manage permissions. There are four tabs included with this tool.

- Analyzer enables you to analyze by User, Permission, and Permission Set Groups. Analyze by user to see what a user has access to and how they have that access. Analyze by permission to see which users have access to that permission and which profiles and permission sets are granting access to that permission.
- Converter enables you to convert a profile to a permission set. You can easily find the right profile to convert by searching and filtering. The converter brings over most permissions!
- Reports enable you to report and export by user, permission set, or dependency. Reporting by user enables you to report and export a list of users and what their access is to permissions you select from the list.
- Manage enables you to manage, edit, clone, and assign permission set groups.

First complete these pre-install steps before installing the app

Installation instructions can be found here:

https://help.salesforce.com/s/articleView?id=sf.perm_install_uapa.htm&type=5

AppExchange Listing for Installation can found here:

https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FeF99UAF&_ga=2.2521716.577204504.1661179748-1163696007.1657569755