

RLM Activation Pro for Salesforce Usage Documentation

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Installation

RLM Activation Pro requires either hosted or self-hosted Activation Pro.

The RLM Activation Pro application is available and installed through the Salesforce AppExchange. Locate the application on the AppExchange and follow the installation instructions found on salesforce.com:

https://developer.salesforce.com/docs/atlas.en-us.appExchangeInstallGuide.meta/appExchangeInstallGuide/appexchange_install_installation.htm

Configuration

Before using the app, it must be configured to connect to your Activation Pro database:

1. In the top right corner of the page, click the Setup (gear icon) menu and click **Setup**.
2. From the left-hand menu, under **Security**, click **Named Credentials**.
3. Open the Action menu for **ActPro Credentials** and click **Edit**.
 - Enter the URL for your Activation Pro server. **Save**.
4. Open the Action menu for **ActPro License Credentials** and click **Edit**.
 - Enter the URL for your mklic file. **Save**.
5. Click the **External Credentials** tab, then click **ActPro Auth**.
6. Scroll down to **Principals** and open the Action menu for **ActPro_Principal**. Click **Edit**.
7. * Enter the htaccess credentials for username and password. **Save**.
8. From the left-hand menu, locate **Users > Users**.
9. Click **Manage ActPro > Manage Assignments > Add Assignment**.
10. Click the user(s) you would like to give access to Activation Pro.
11. Select **Permission Set Assignments**, then click **Edit Assignments**. The user running the sync will need the **Manage ActPro** permission. Details on the three permission levels are below.
12. Close the Setup menu and search for “RLM” in the app launcher. Click **RLM** to open the app.
13. Click the **ActPro Config** tab.
14. **Enter the username and password you will use to connect to your Activation Pro instance.
15. You are now ready to sync with Activation Pro.

* Required for hosted activation. For self-hosted, this will depend on whether or not you have setup authorization in your ActPro instance.

** It is important to use a different username for API access and interactive Activation Pro access, otherwise interactive users will interfere with the API calls. If you have multiple processes using the API, they should use separate usernames as well. The ActPro user will need **Edit** permissions.

Permission Levels

RLM Activation Pro has three permission levels: **View**, **Support**, and **Manage**

View

Permission Set: View ActPro

Can view product definitions and license keys in the app.

Support

Permission Set: Support ActPro

Has the same permissions as the View level, as well as the ability to create and delete fulfillments.

Manage

Permission Set: Manage ActPro

Same permissions as Support, as well as the ability to create, edit, and delete product definitions and activation keys. This level can also run the sync.

Using RLM Activation Pro

Now that the app has been configured and synced with your Activation Pro database, you may begin using the app. Once Salesforce has been connected to Activation Pro **all product definition and activation key operations (create/edit/delete) should be performed through Salesforce.**

Product Definitions

Managing product definitions through Salesforce is very similar to managing them through the Activation Pro interface, with a few differences:

When creating or editing a product definition you are limited to these fields:

- Product Definition Name
- License Name
- Product ID
- Parent Product (called “Primary License” in ActPro)
- Include Actkey in License
- Obsolete
- Display Order
- Version #
- Enabled

- Issued Date
- Prepend Text
- Generator Algorithm
- API Status
- API Error
- License Type
- Notes

After creating your product definition(s) additional fields may then be added directly on each activation key.

Product Bundles

In Activation Pro, to create a bundle or suite of products, you first create a product definition (the primary license) and then add licenses to this product. To create a bundle in Salesforce:

1. Create a product definition for the “primary” license (the parent product).
2. For each sub-license in the bundle, create a product definition and select the primary license from the Parent Product field.
3. Add additional product definitions as needed.

Sync Status

API Status and **API Error** display the sync status between Salesforce and Activation Pro. When API Status shows “Error” the error message will be displayed in the API Error window. These fields are generated automatically and should not be changed.

For more information on product definitions in Activation Pro, please see the documentation on our website: <https://reprisesoftware.com/docs/actpro/product-definitions.html>

Activation Keys

Activation keys in Salesforce are essentially the same as in Activation Pro, with a few differences:

- There is no option for number of activation keys (to create). The reason for this is that we expect activation keys to be created on demand as new orders are generated in Salesforce.
- **Company** and **Contact** do not use the customer fields in Activation Pro, these use the Company and Contact objects within Salesforce.
- Deleting an activation key with existing fulfillments will delete the fulfillments as well.
- There are two additional fields, API Status and API Error (see below).

Sync Status

API Status and **API Error** display the sync status between Salesforce and Activation Pro. When API Status shows “Error” the error message will be displayed in the API Error window. These fields are generated automatically and should not be changed.

For more information on activation keys in Activation Pro, please see the documentation on our website: <https://reprisesoftware.com/docs/actpro/activation-keys.html>

Fulfillments

To view fulfillments for a license, locate and open the activation key in Salesforce and select **Manage Fulfillments** on the right-hand side of the activation key heading. This will open a modal displaying all existing fulfillments for the activation key. From this modal you can **View** the contents of the activation, as well as **Delete** a fulfillment.

Manual Activation

If a customer is having issues with internet activation and requires a manual activation, open the activation key and select **Create Fulfillment** on the right-hand side of the activation key heading. Enter the **Host ID**, and in the case of a floating license, the **Hostname** and **Count**, then click **Generate License**. The license text will be displayed in the window. If there is an activation issue, the error message will be displayed instead.

Security Considerations for Self-Hosted ActPro

The following steps are recommended to secure your self-hosted Activation Pro implementation. This requires the purchase of an SSL certificate for your website.

Check if headers module is enabled:

```
apachectl -M
```

If not, enable headers module:

```
sudo a2enmod headers
```

Add following to bottom of apache configuration:

```
<IfModule mod_headers.c>
    Header edit Set-Cookie ^(.*)$ "$1; SameSite=Strict; Secure;
HttpOnly"
</IfModule>
```

Note:

Secure attribute should only be added if using HTTPS with valid certificates and domain name.

Support

For any issues or questions, please contact support@reprisesoftware.com.