CASE TRACER

Installation Guide

Installation

❖ Pre-installation steps:

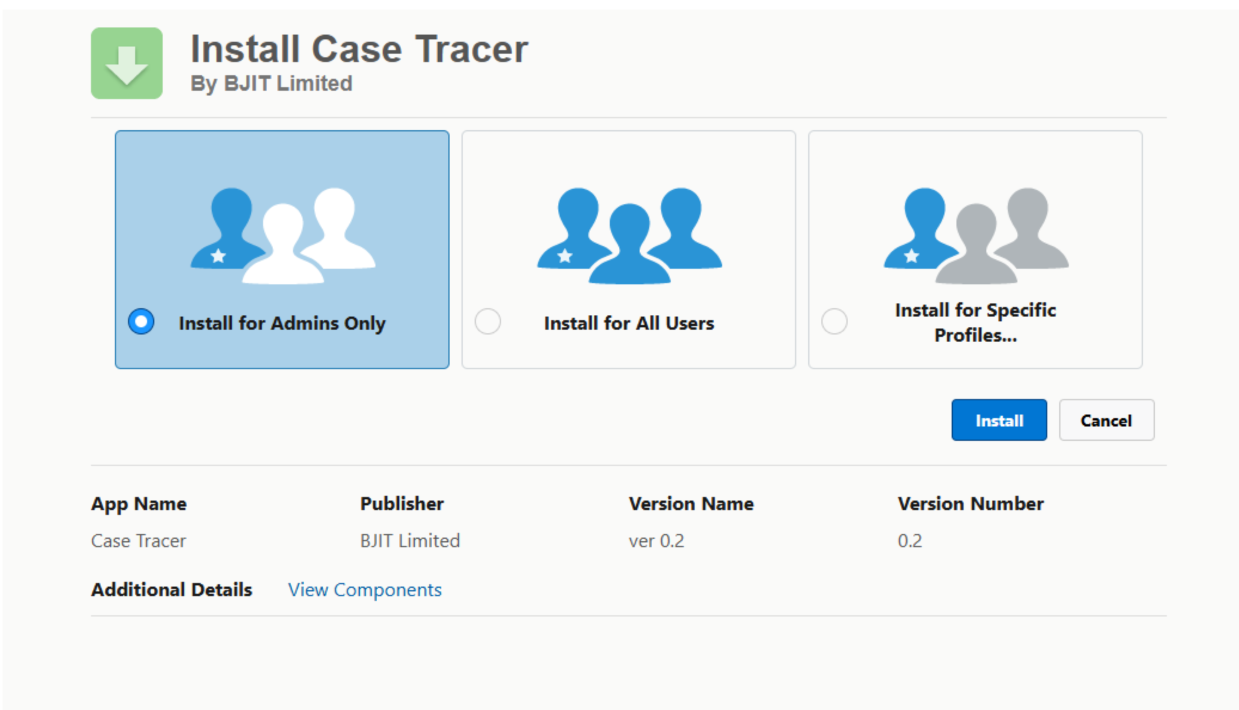
1. Login to Salesforce
2. Go to the Setup/Quick Find search box, search for **Field Service Settings,** and enable it.
3. Go to Setup/Quick Find search box, search for **Email-to-Case,** and select **Enable Email-to-Case** & **Enable On-Demand Service**.

➢ Package details:

- **Package Link:** **https://login.salesforce.com/packaging/installPackage.apexp?p0=04tGA000005VlbuYAC**

➢ Installation steps:

1. Click the Package Link that is given above and log in to Salesforce.
2. Click the **Install** button.



❖ **Post-installation steps**:

1. Now, from **Object Manager,** enter the **Case** object.
2. Click **Case Page Layouts** and assign Page Layout named **CT Case Layout** to the desired **Profiles**.

❖ **Permission Sets Configuration:**

1. Go to the Setup/Quick Find search box, and search for "Permission Sets".
2. Click on "**Case Tracer Admin Permissions**".
3. Click the "Manage Assignments" button top. If you don't see a list, then click on the **Select a List View** and change it to **Active Users.**
4. Click the "Add Assignment" button from the right side and select the desired user.
5. Click "Next" and then the "Assign" button.

❖ Create a **Connected App**, an **Auth Provider**, and a **Named Credential** for the **Case Matching and Case Merging** tab "Use Optional Filtering" features. If you choose not to use this optional filtering, you may skip these steps. Creation steps are given below.

1. Connected App creation steps:

1. Go to the Setup/Quick Find search box, and search for **App Manager**.
2. Click the **New Connected App** button from the top right corner.
3. Enter "Case Tracer Connected App" in the Connected App Name textbox and the API Name will be automatically filled.
4. In the Contact Email field enter an email.
5. In the **API (Enable OAuth Settings)** section, check the **Enable OAuth Settings**.
6. Next check **Enable for Device Flow** & **Callback URL** will fill automatically with a dummy URL; we will change it later with a valid one.
7. From the **Selected OAuth Scopes** dual list add the following information:
   - Full access (full)
   - Perform requests at any time (refresh_token, offline_access)

8. Click the Save button, and next click the Continue button.
9. In the **API (Enable OAuth Settings)** section, click the **Manage Consumer Details** button beside the "Consumer Key and Secret" text.
10. You will be redirected to a new tab where users have to enter the Verification Code that is sent to your org email and click the Verify button.
11. Copy "Consumer Key" & "Consumer Secret" from the "Consumer Details" section and store it somewhere to use later.

2. Auth Provider creation steps:

1. Go to the previous tab and search **Auth. Providers** in the Quick Find search box.
2. Click the New button.
3. Choose "Open ID Connect" from the "Provider Type" dropdown menu.
4. Enter "Case Tracer Auth Provider" in the "Name" field and the "URL Suffix" will be automatically filled.
5. Paste the "Consumer Key" & "Consumer Secret" that you stored in the connected app creation steps 11.
6. Paste **https://login.salesforce.com/services/oauth2/authorize** URL in "Authorize Endpoint URL".
7. Paste **https://login.salesforce.com/services/oauth2/token** URL in "Token Endpoint URL".
8. Click the Save button.
9. Copy "Callback URL" to update the already created Connected App Callback URL.
10. Go to Setup/Quick Find search box, and search for "App Manager".
11. Click the down arrow at the rightmost side of "Case Tracer Connected App" and click Edit.
12. In the "API (Enable OAuth Settings)" section, erase the existing URL in the "Callback URL" textbox and paste the "Callback URL" that you stored earlier in step 9.
13. Click the Save button, and next click the Continue button.
14. Click the Edit button, and next click the Cancel button.

3. Named Credential creation steps:

1. Search **Named Credentials** in the Quick Find search box.
2. Click the down arrow button next to the New button.
3. Click "New Legacy" and a form page will open.
4. Enter "Case Tracer Named Credential" in the Label and the Name will be automatically filled.
5. In the URL textbox, copy and paste the already created Auth. Provider "Callback URL" from the URL textbox up to the ".com" field.
6. From "Identity Type" choose "Named Principal".
7. From "Authentication Protocol" choose "OAuth 2.0".
8. Click the Search icon beside the "Authentication Provider" textbox and a popup box will open.
9. Select **Case Tracer Auth Provider** and the popup box will automatically close.
10. Click the Save button, and you will be taken to a new page.
11. Click the Allow button, and you will be taken to the Named Credential page.
12. The text besides "Authentication Status" should be "Authenticated". If the text is "Pending", click the Edit button, and after then the Cancel button.