

GoElephant

Salesforce Value Intelligence



Installation Guide

June, 2026

The purpose of this document is to guide you through the steps to set up the **GoElephant**.

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Installation guide

Let's get started – installation is super quick.

1. Install GoElephant in your org

As a **Salesforce Admin** follow these steps to install **GoElephant** in your org:

1. Install package directly from [AppExchange listing](#)
 - a. Install for **Admins Only**
2. Receive email confirmation that the package has been installed

After completing step 1 and 2, you are ready to configure the **GoElephant** app for your org.

2. Configure GoElephant in your org

As a **Salesforce Admin** follow these steps to configure **GoElephant** for your org:

1. Assign the **GoElephant Admin** permission set to Salesforce Admin(s), only. This grants permission to configure the **GoElephant** app.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Analytics Groups, Permission Set Groups, Permission Sets (highlighted), Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'Permission Sets' and includes a search bar, a 'New' button, and a table of permission sets. The table has columns for Action, Permission Set Name, Description, and License. The 'GoElephant Admin' permission set is highlighted with a green arrow.

Action	Permission Set Name	Description	License
Clone	ConnectivityServiceCASCPermSet		Cloud Ini
Clone	Constraint Rules Engine Licenseless permission set	Create and manage constraint types and rules in Advanced Configurator.	Cloud Ini
Clone	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Ini
Clone	DeliveryEstimationServicePermSet		Cloud Ini
Clone	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log Objects, Real-Time Events, and ...	Salesfor
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with the right user lice...	Field Ser
Clone	GoElephant Admin	Permissions for GoElephant App Admin	
Clone	GoElephant App User	Permissions for GoElephant App Users	
Clone	GoElephant License Manager	Grants authority to freeze and unfreeze users from LMI and to create, activate, and manage reclamation ...	
Clone	GoElephant Salesforce End-User	Permissions for GoElephant Salesforce End-Users	

2. Assign the **GoElephant License Manager** permission set to "System Admin" level users who will manage License Reclamation Policies. Reclamation Policies identify underused Salesforce licenses and can freeze the associated user accounts to reclaim those licenses.
 - a. **Important note:** Because this permission set can freeze user accounts and includes broad user administration access, **assign it only to trusted System Admin level users**. It must be assigned in **addition to**, not instead of, the **GoElephant Admin** and **GoElephant App User** permission sets.

The screenshot shows the Salesforce Setup interface, specifically the 'Permission Sets' page. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area displays a table of permission sets. A green arrow points to the 'GoElephant License Manager' row, which is highlighted in blue. The table columns are 'Action', 'Permission Set Name', 'Description', and 'License'.

Action	Permission Set Name	Description	License
☐	ConnectivityServiceCASCPermSet		Cloud Int
☐	Constraint Rules Engine Licenseless permission set	Create and manage constraint types and rules in Advanced Configurator.	Cloud Int
☐	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Int
☐	DeliveryEstimationServicePermSet		Cloud Int
☐	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log Objects, Real-Time Events, and ...	Salesfor
☐	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with the right user lice...	Field Ser
☐	GoElephant Admin	Permissions for GoElephant App Admin	
☐	GoElephant App User	Permissions for GoElephant App Users	
☐	GoElephant License Manager	Grants authority to freeze and unfreeze users from LMI and to create, activate, and manage reclamatio...	
☐	GoElephant Salesforce End-User	Permissions for GoElephant Salesforce End-Users	

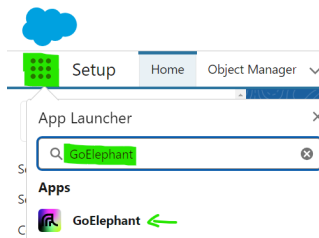
3. Assign the **GoElephant App User** permission set to people who need the **GoElephant adoption insights**; e.g. change and enablement managers, product owners, and program owners.

The screenshot shows the Salesforce Setup interface, specifically the 'Permission Sets' page. The left sidebar shows the navigation menu with 'Permission Sets' selected. The main content area displays a table of permission sets. A green arrow points to the 'GoElephant App User' row, which is highlighted in blue. The table columns are 'Action', 'Permission Set Name', 'Description', and 'License'.

Action	Permission Set Name	Description	License
☐	ConnectivityServiceCASCPermSet		Cloud Int
☐	Constraint Rules Engine Licenseless permission set	Create and manage constraint types and rules in Advanced Configurator.	Cloud Int
☐	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Int
☐	DeliveryEstimationServicePermSet		Cloud Int
☐	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log Objects, Real-Time Events, and ...	Salesfor
☐	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with the right user lice...	Field Ser
☐	GoElephant Admin	Permissions for GoElephant App Admin	
☐	GoElephant App User	Permissions for GoElephant App Users	
☐	GoElephant License Manager	Grants authority to freeze and unfreeze users from LMI and to create, activate, and manage reclamatio...	
☐	GoElephant Salesforce End-User	Permissions for GoElephant Salesforce End-Users	

4. Add the **GoElephant Survey** component to the Utility Bars of the Salesforce apps your **Salesforce End-Users** use:
 - a. In Salesforce Setup, navigate to the App Manager
 - b. Edit an app your **Salesforce End-Users** are using, e.g. "Sales"
 - c. Place the **GoElephant "Share Feedback"** component on the Utility Bar
 - i. Set to width: **660** and Height: **500**
 - ii. Click **"Start automatically"**

- d. Click **Save**
 - e. Repeat step a.-d. for all Salesforce apps your **Salesforce End-Users** use
5. Using the App Launcher, navigate to the **GoElephant** app:



6. Go to the **"GoElephant Setup"** tab
 - a. Select data retention policy
 - b. Select your policy for **GoElephant Salesforce End-User** Permission Set assignment
 - c. Select Team Rollup Method – how to compare adoption across your organization
 - i. By Role Hierarchy
 - ii. By a custom field on the User object (E.g. Market, Sales Org, Business Unit or Team)
 - iii. By the Manager field on the User object
 - d. Add objects to track to count towards your **GoElephant** Usage Score
 - i. You can select any standard or custom object
 - e. Define expected activity level for your users – by
 - i. Setting the same expected activity level for all users
 - ii. Setting different expected activity levels by Role
 - iii. Setting different expected activity levels by a picklist field on the user object (e.g. Function)
 - f. (Optional) Input user license pricing to be able to calculate license reclamation potential.
 - g. Click: **"Confirm"**

If you change the policy for Permission Set assignment from "Assign to all active internal users" to "Manually assign", users with the permission set currently assigned will continue to have it assigned unless you manually remove them.

This completes the installation and configuration steps. Well done. **GoElephant** is now collecting adoption data.

GoElephant will begin to generate insights – so you can drive 10x more targeted and impactful enablement activities.

Questions?

If you have questions, issues or ideas, please contact:

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