

SetSail Feature: SFDC Managed Package

Last Update: Aug 2023

Need Help? Email support@setsail.co

Instructions to Install SetSail in SFDC

Background

SetSail's Salesforce application helps RevOps and Revenue Leaders see every rep activity, know what's effective, and drive more revenue without leaving their CRM.

Feature Description

With SetSail's Salesforce app, SetSail users have access to the following within Salesforce:

- SetSail Web App via a SetSail tab
- CRM Writeback dashboard and reports
- Activity timeline on Accounts and Opportunities displaying Activity, Contact, Team

Installed Components

Component Name	Parent Object	Type
SetSail ID	Contact	Custom Field
Setsail ID	Activity	Custom Field
SetSail		Visualforce Page
SetSail		Tab
SetSail_Account		Visualforce Page
SetSail_Opportunity		Visualforce Page
SetSail		Connected App
SetSail Contacts Created		Report
SetSail Emails Received		Report
SetSail WriteBack Dashboard		Dashboard
SetSail Activities (Emails + Meetings)		Report
SetSail Contact Fields Enriched		Report
SetSail Upcoming Meetings		Report
SetSail User Emails (All)		Report
SetSail Emails Sent		Report
SetSail Meetings (All)		Report
SetSail WriteBack Reports		Report Folder
SetSail WriteBack Dashboards		Dashboard Folder

Installing the SetSail Salesforce App

Installing the SetSail in SFDC app must be performed by a Salesforce Admin User.

1. Go to Salesforce AppExchange (<https://appexchange.salesforce.com/>) and search for 'SetSail'.

2. Click the SetSail title.
3. Click **Get It Now** to install the package.
4. Choose whether to install the app in your production org, or in a sandbox org where you can perform any testing required by your organization.
Note: If you choose to test the package in your sandbox org and have satisfied your organization's testing requirements, repeat this process to install the package in your production org.
5. Select the 'Install for all users' option. (Note: the download typically takes 3-5 minutes.)

Customizing the App Experience

To provide users with easy access to all of the SetSail features, you can integrate SetSail using one of the following methods:

- **Lightning Experience:** Add SetSail Visualforce Pages to your Salesforce Sales App
- **Classic Mode:** Add SetSail Visualforce Objects to your Salesforce Page Layouts

Lightning Experience

If using the Salesforce Lightning Experience, you can add:

- The SetSail Web App as a tab to your Salesforce Sales App
- Activity Timelines to the Account and Opportunity Pages (

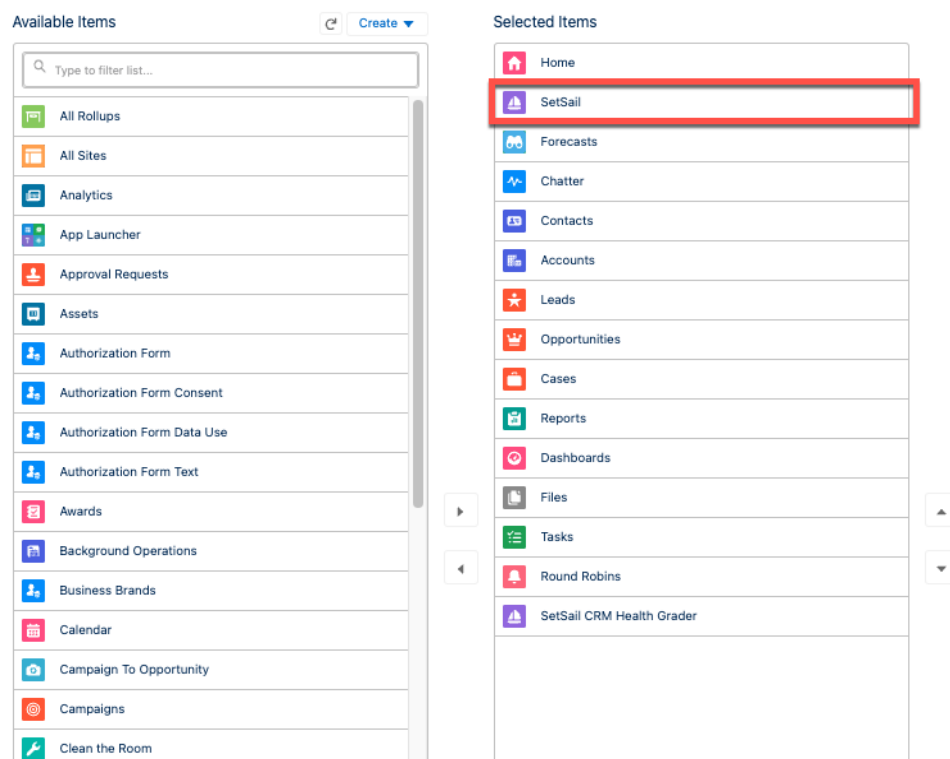
SetSail Web App as a Tab to your Salesforce Sales App

The SetSail App provides a VisualForce page as a tab

1. Go to Setup
2. In Setup, navigate to App Manager
3. Edit the Sales app or the appropriate corresponding app
4. Click on "Navigation Items"
5. Add SetSail to the "Selected Items" section from the "Available Items" section
6. Click Save

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove items that don't support.



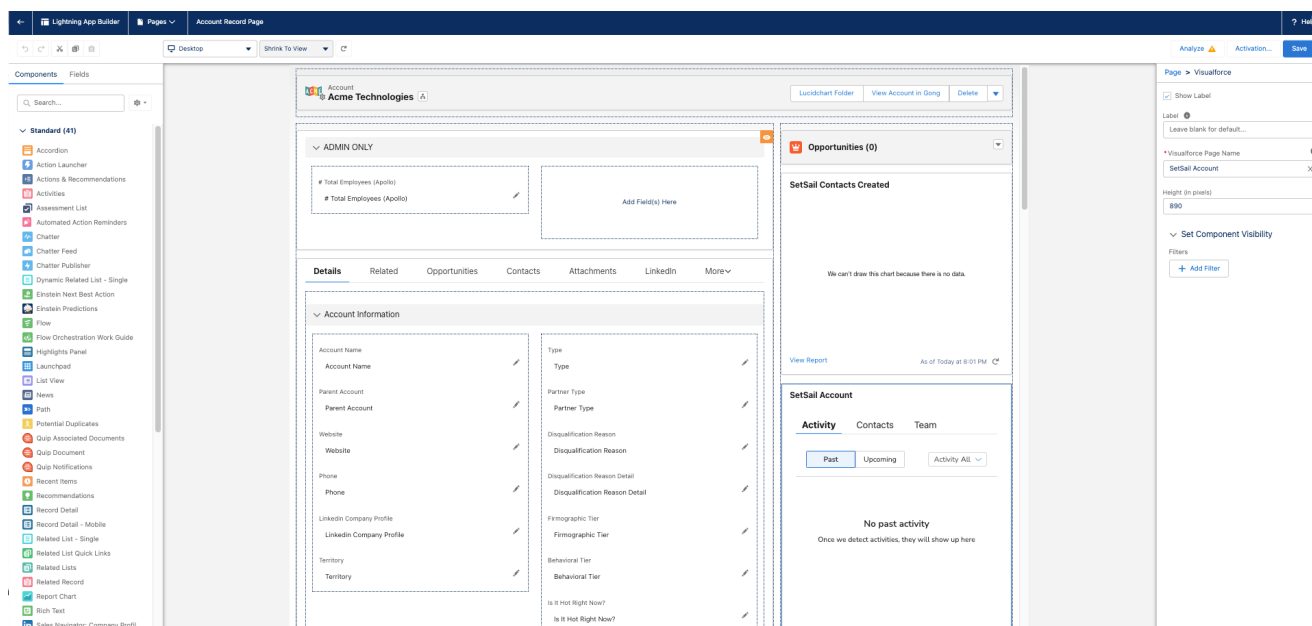
The screenshot shows the 'Navigation Items' configuration page in Salesforce. It is divided into two main sections: 'Available Items' and 'Selected Items'.

- Available Items:** A list of items that can be added to the navigation bar. It includes a search bar at the top and a scrollable list of items such as 'All Rollups', 'All Sites', 'Analytics', 'App Launcher', 'Approval Requests', 'Assets', 'Authorization Form', 'Authorization Form Consent', 'Authorization Form Data Use', 'Authorization Form Text', 'Awards', 'Background Operations', 'Business Brands', 'Calendar', 'Campaign To Opportunity', 'Campaigns', and 'Clean the Room'.
- Selected Items:** A list of items that are currently in the navigation bar. It includes a search bar and a scrollable list of items such as 'Home', 'SetSail', 'Forecasts', 'Chatter', 'Contacts', 'Accounts', 'Leads', 'Opportunities', 'Cases', 'Reports', 'Dashboards', 'Files', 'Tasks', 'Round Robins', and 'SetSail CRM Health Grader'. The 'SetSail' item is highlighted with a red box.

Activity Timelines to the Account and Opportunity Pages

The SetSail App provides a Visualforce Page that can be added to the Account and Opportunity Pages displaying activity, contact, and team data. *Note: This is an early beta feature and we recommend not displaying it to users in production.*

1. Within Salesforce Setup, search for Object Manager
2. Click Object Manager
3. Select Account or Opportunity
4. Select Lightning Record Pages
5. Click the Account or Opportunity label of the Lightning Record Page to which you want to add the SetSail Activity Timeline
6. Click Edit
7. Within the editor, click where you would like to add a component
8. Click Visualforce on the left hand components panel
9. Select "SetSail Account" or "SetSail Opportunity"
10. Set Height to 890 pixels
11. Click Save



Classic Mode

If using the Salesforce Lightning Experience, you can add:

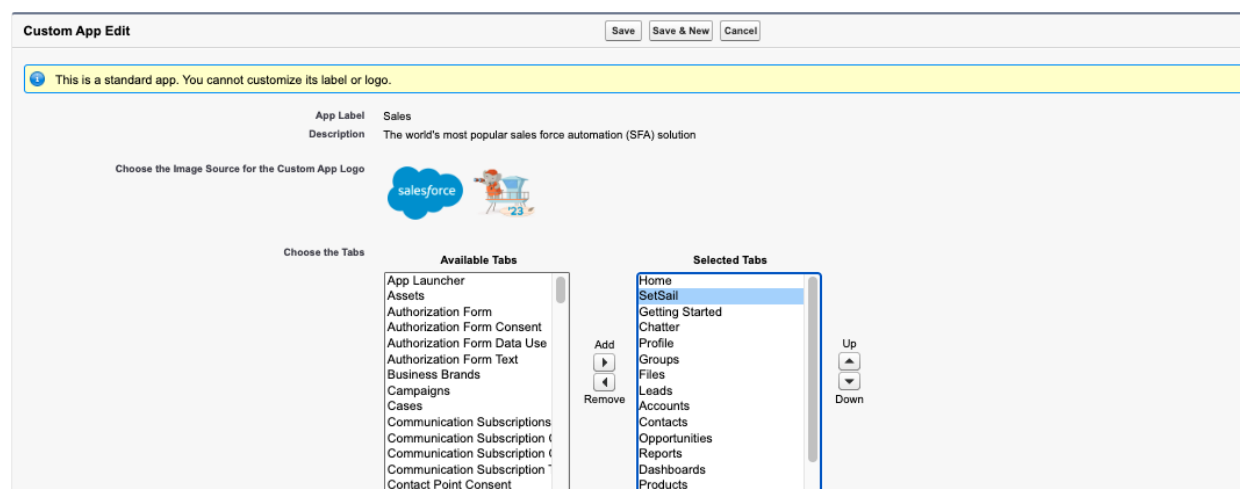
- The SetSail web app as a tab to your Salesforce Sales App
- Activity Timelines to the Account and Opportunity Pages

The SetSail Web App as a tab to your Salesforce Sales App

The Setsail App provides a VisualForce page as a tab in Salesforce Sales App or whichever app that gives you access to the SetSail Web App

1. Go to Setup
2. In Setup, on the left hand panel go to Build → Create → Apps.
3. Edit the Sales app or whichever corresponding app.
4. Add SetSail to the “Selected Tabs” section from the “Available Tabs” section.
5. Click Save.

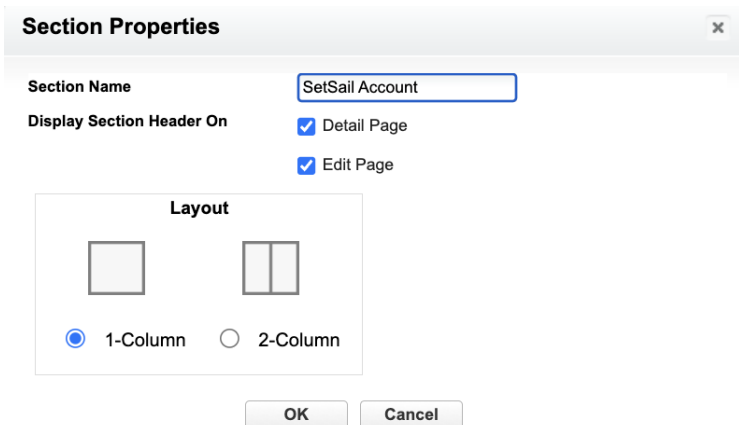
App
salesforce.com



Activity Timelines to the Account and Opportunity Pages

The SetSail App provides a Visualforce Page that can be added to the Account and Opportunity Pages displaying activity, contact, and team data. *Note: This is an early beta feature and we recommend not displaying it to users in production.*

1. Within Salesforce Setup, search for Page Layouts.
2. Select Page Layouts under opportunities or accounts.
3. Select Edit beside the page layout to which you want to add the Visualforce page.
4. Click and drag a new Section onto the page layout. This section will be dedicated to the SetSail application.
5. Name the section SetSail and select 1-Column as the layout.



Section Properties

Section Name:

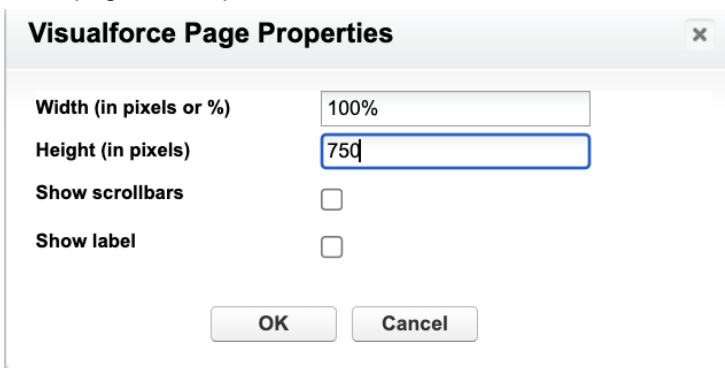
Display Section Header On: ☒ Detail Page ☒ Edit Page

Layout

☒ 1-Column ☐ 2-Column

OK Cancel

6. Select Visualforce Pages from the main navigation header.
7. Click and drag the SetSail Visualforce page into the section.
8. Double-click the Visualforce page or select the properties wrench in the top right corner. Adjust the height of the page to 750 pixels.



Visualforce Page Properties

Width (in pixels or %):

Height (in pixels):

Show scrollbars: ☐

Show label: ☐

OK Cancel

9. Save the page layout.

CRM Writeback Dashboard

Keeping track of all the valuable sales activities and contacts that SetSail CRM Writeback is writing back to your CRM is easier to do with reports and dashboards. To help you get started, we've created a starter dashboard in Salesforce with reports.



Uninstalling SetSail's Salesforce App

1. If you have added the activity timeline to the Account and Opportunity pages, they must be removed first
2. Once they have been removed, go to **Setup > Installed packages**
3. Click the **Uninstall** link
4. Scroll to the bottom of the **Uninstalling a Package** page and select **Do not save a copy of this package's data after uninstall**
5. Select **Yes, I want to uninstall this package and permanently delete all associated components**, and then click **Uninstall**
 - a. If you skipped removing the activity timelines from the Account and Opportunity pages you may receive an error to remove them
6. As soon as the package is uninstalled, you'll get a **Package "SetSail" Uninstall Successful** notification
7. Go to **Setup > Installed Packages**
8. Click **Del** next to the **SetSail app** in the **Uninstalled Packages** pane