Perfluence

Relationship Intelligence and Influence Management™

Enterprise Relationship Capital Management

Powerscope

Install and Setup Guide
Salesforce Edition 2024 (v1.9)

Prerequisites

Ensure you have full admin access to one of the following Salesforce Sales Cloud editions:

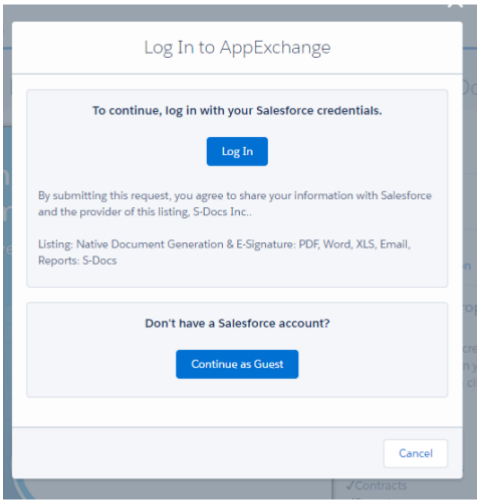
Professional, Enterprise or Unlimited, edition – Lightning Experience

Installation guide

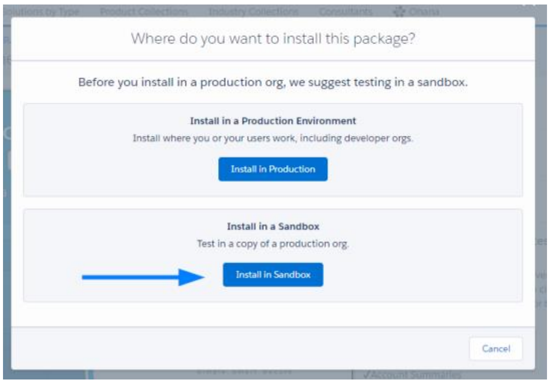
Installation

1. Visit Powerscope's Appexchange listing and click **Get it Now**

2. Enter your Salesforce org credentials

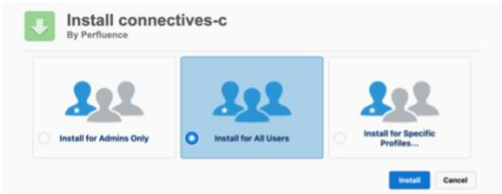


3. Decide between your Production Org or a Sandbox Instance. We strongly recommend testing in a sandbox before installing in production.



4. Confirm your profile details, accept the terms and conditions, and click **Confirm and Install**

5. Select ***Install for All users***, then click **Install**



Congratulations! Powerscope is now installed in your org.

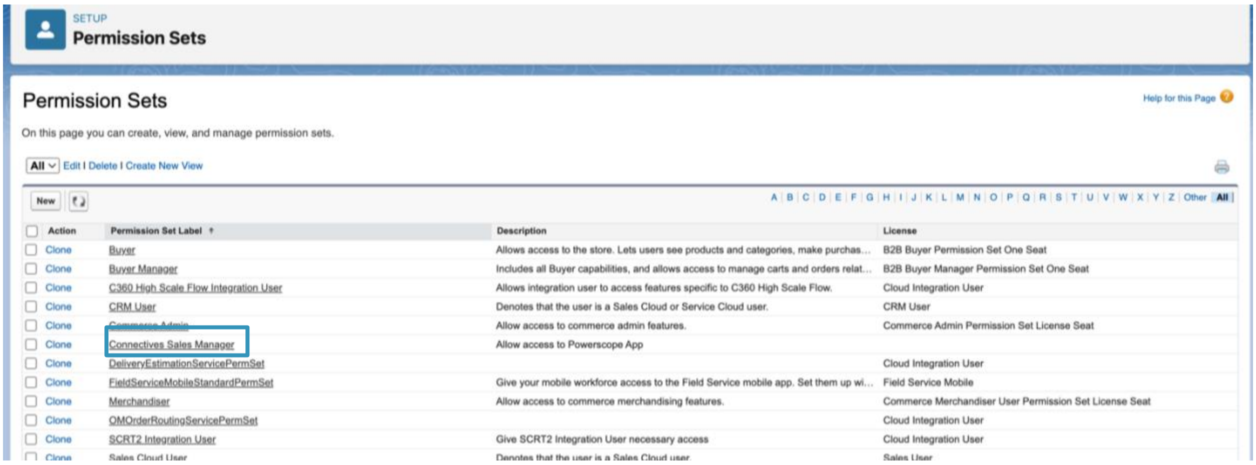
One installed, assign the appropriate User or Administrator Permission Sets to users interacting with Powerscope.

Setup

1. Configure Permission Sets

Navigate to Setup > Users > Permissions Sets

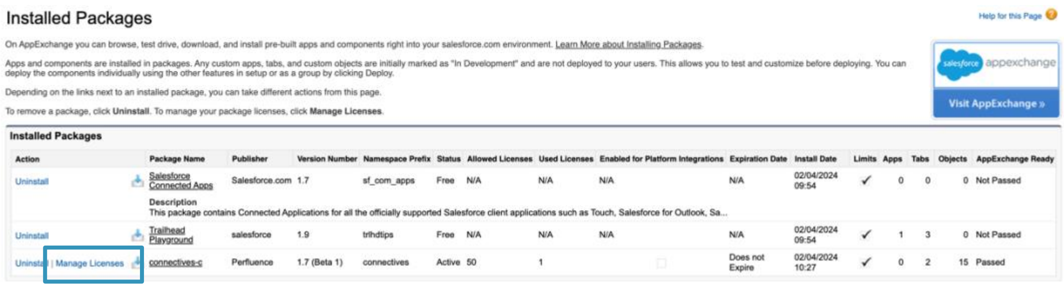
Select **Connectives Sales Manager** to manage permission assignments.



2. Manage licenses

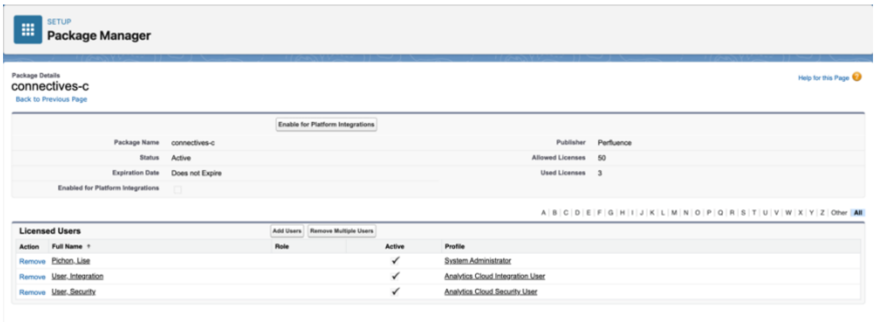
Go to Setup and search for Installed Packages.

Click Manager Licenses next to the Powerscope package.



Add or remove users:

- Click **Add Users** to assign licenses or **Remove Multiples Users** to revoke them.
- Confirm changes under the **Licensed Users** section.



3. Embed Powerscope Components

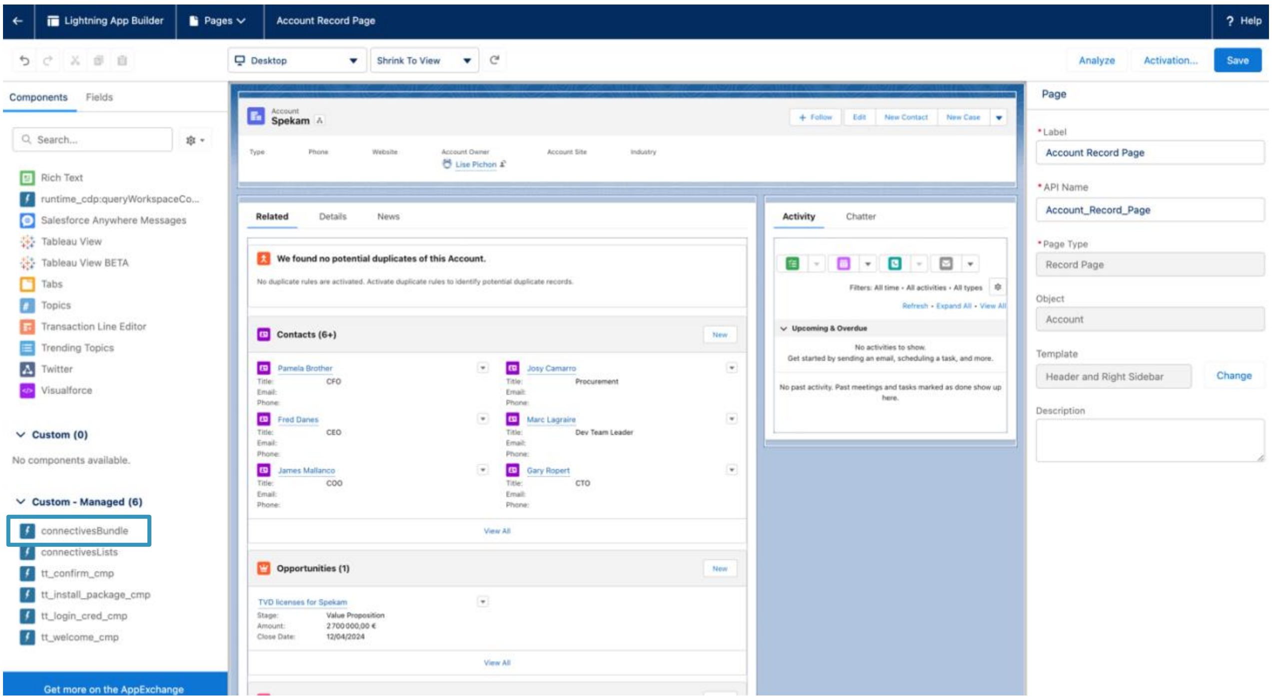
- Accounts

Open an **Account record Page**.

Click **Setup**, then **Edit Page**.

Use the **App Builder** to add the **ConnectivesBundle** component.

Save and Activate changes.

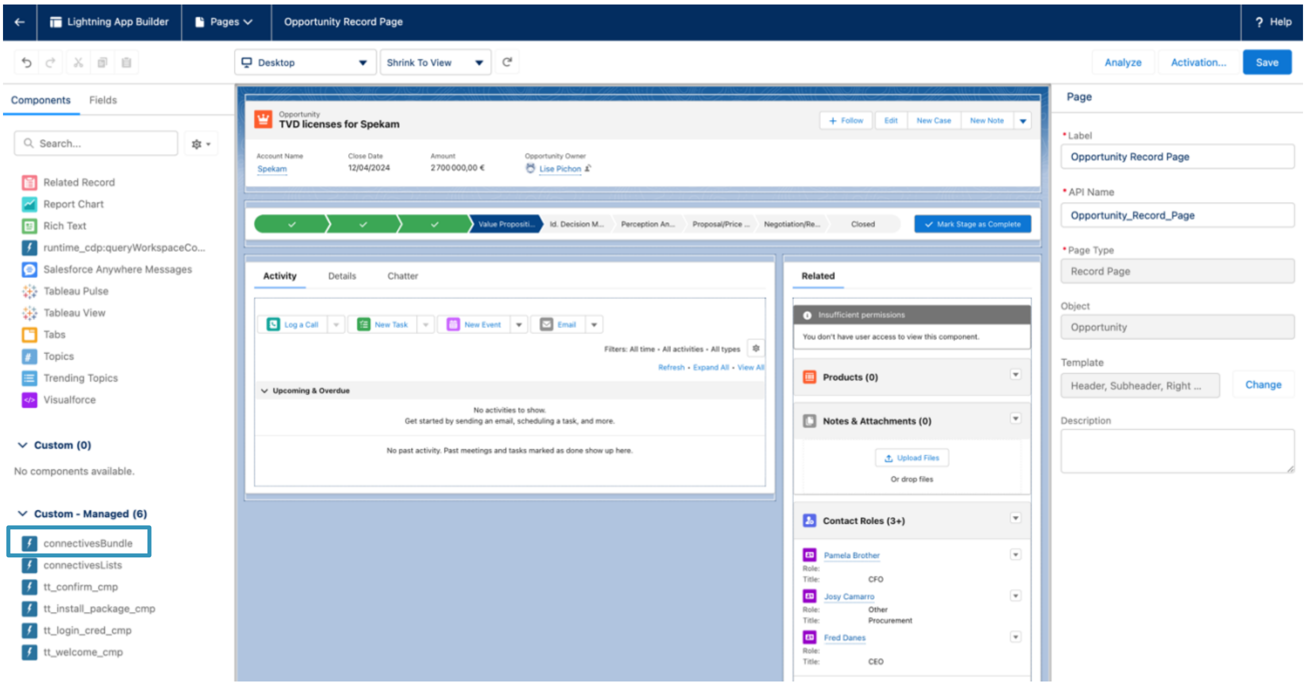


- Opportunity

Open an **Opportunity record page.**

Repeat the steps above, using the **ConnectivesBundle** component.

Save and Activate changes.

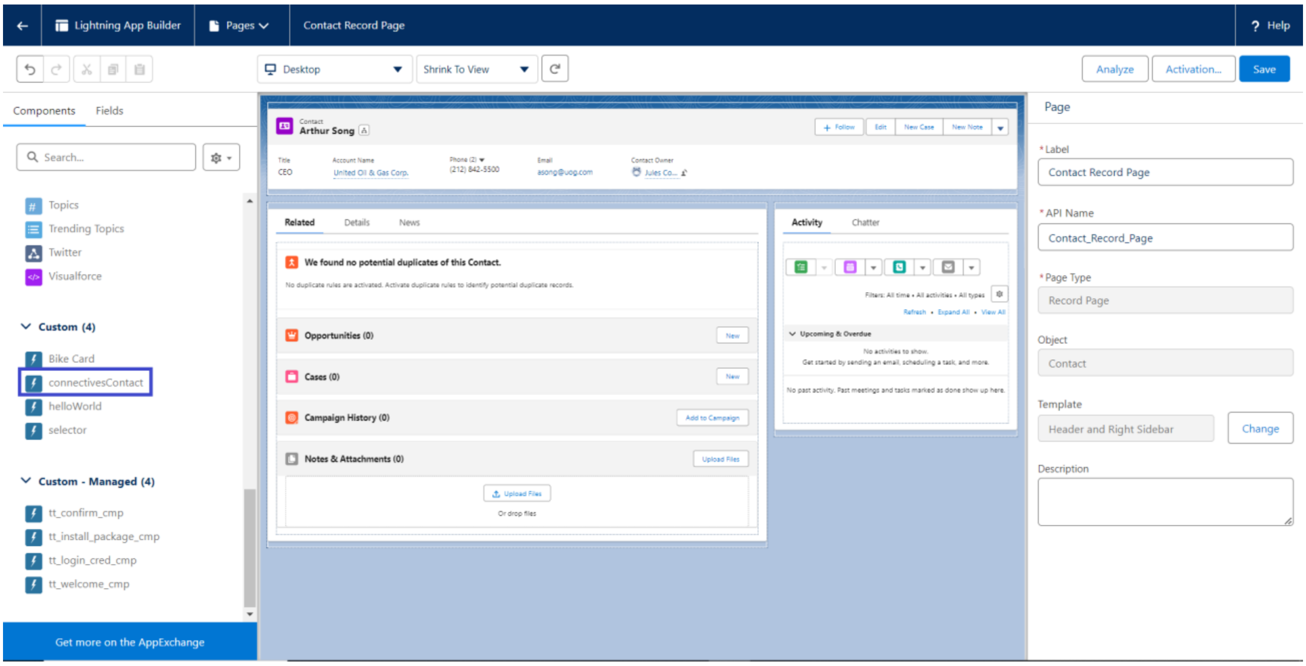


- Contacts

Open a **Contact record page.**

Repeat the steps above, using the **ConnectivesBundle** component.

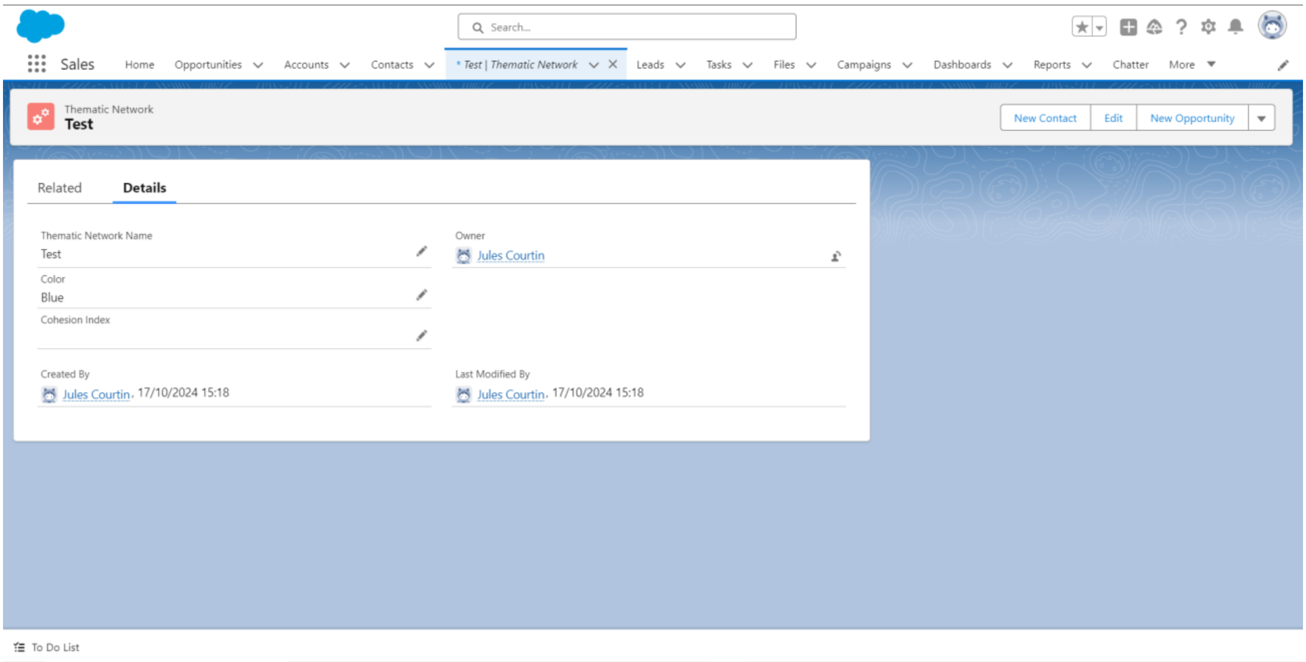
Save and Activate changes.



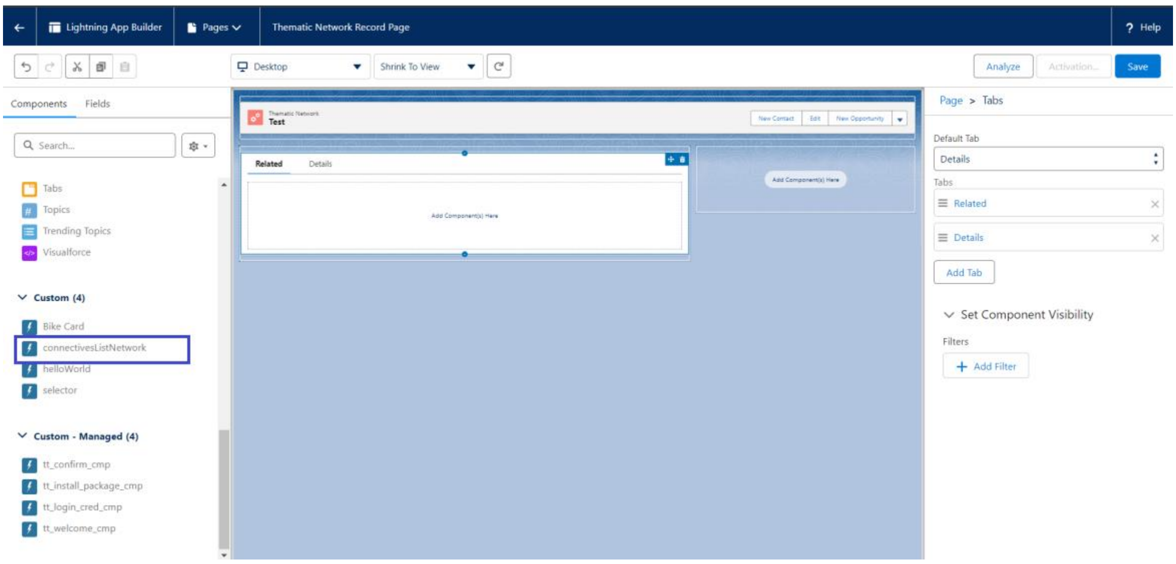
4. Add Thematic Networks

Go to the Thematic Network Tab and create a Thematic Network

Open the network, click **Setup**, and select **Edit Page**.



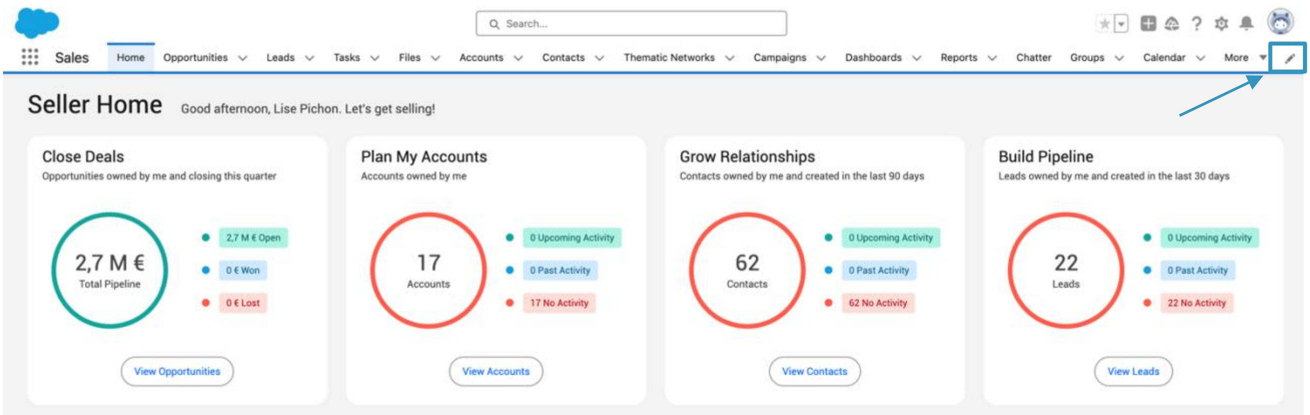
Add the **ConnectivesListNetwork** component.



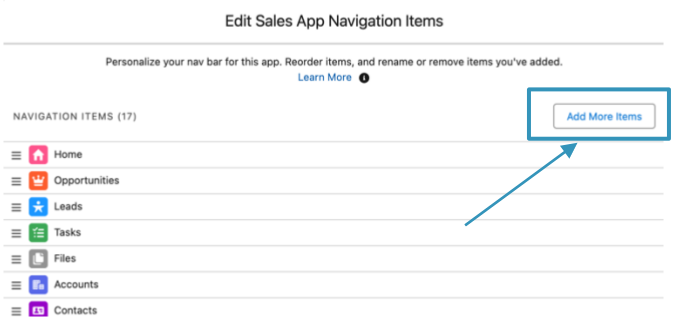
- **Customize Navigation items**

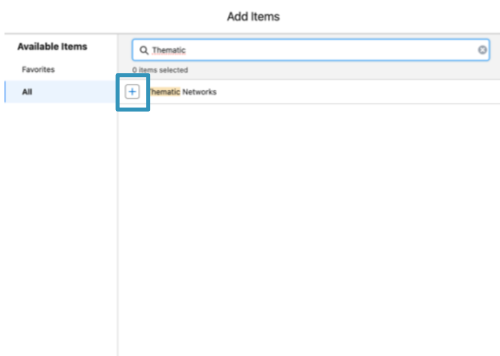
This operation must be performed by the users.

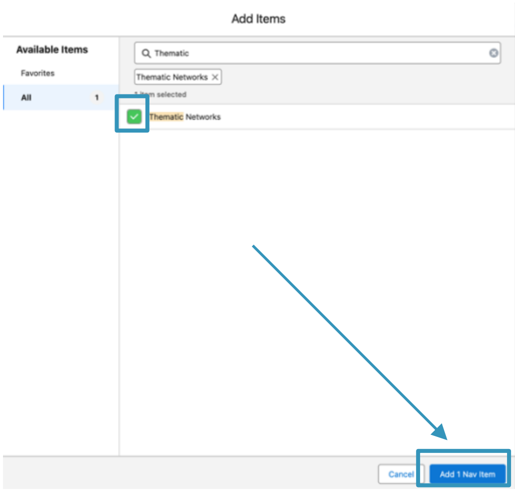
From the home page, edit the **Sales App Navigation Items.**

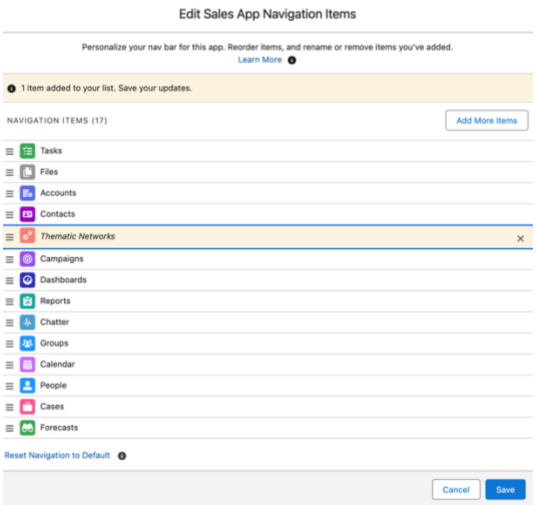


Click **Add More Items** and search for Thematic Networks.









Add it to your navigation and save changes.