



Perfluence

Relationship Intelligence and Influence Management™

Enterprise Relationship Capital Management

Powerscope

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Install and Setup Guide

Salesforce Edition 2024 (v1.9)

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Prerequisites

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

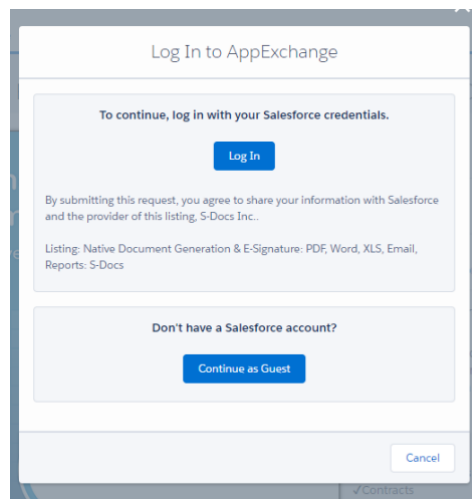
Professional, Enterprise or Unlimited, edition – Lightning Experience

Installation guide

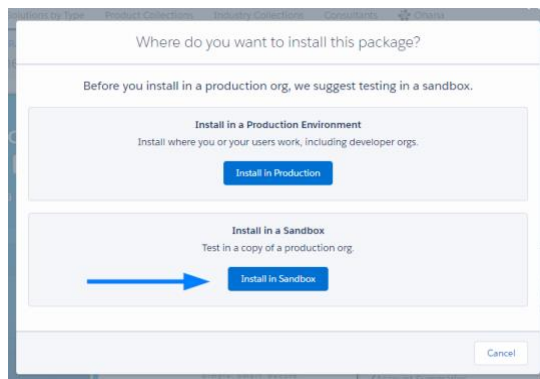
Installation

1. Visit [Powerscope's Appexchange listing](#) and click **Get it Now**

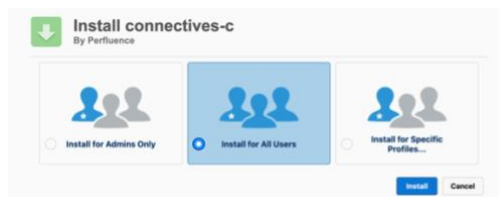
2. Enter your Salesforce org credentials



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.

Once 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.

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The page title is 'Permission Sets' with a sub-header 'On this page you can create, view, and manage permission sets.' Below the header, there are links for 'All', 'Edit', 'Delete', 'Create', and 'New View'. A table lists various permission sets, with 'Connectives Sales Manager' highlighted in blue. The table columns are Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
☐	Buyer	Allows access to the store. Lets users see products and categories, make purchas...	B2B Buyer Permission Set One Seat
☐	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders relat...	B2B Buyer Manager Permission Set One Seat
☐	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
☐	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
☐	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
☐	Connectives Sales Manager	Allow access to Powerscope App	
☐	DeliveryEstimationServicePermSet		Cloud Integration User
☐	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up wi...	Field Service Mobile
☐	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
☐	QMOOrderRoutingServicePermSet		Cloud Integration User
☐	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
☐	Sales Cloud User	Denotes that the user is a Sales Cloud user	Sales User

2. Manage licenses

Go to Setup and search for Installed Packages.

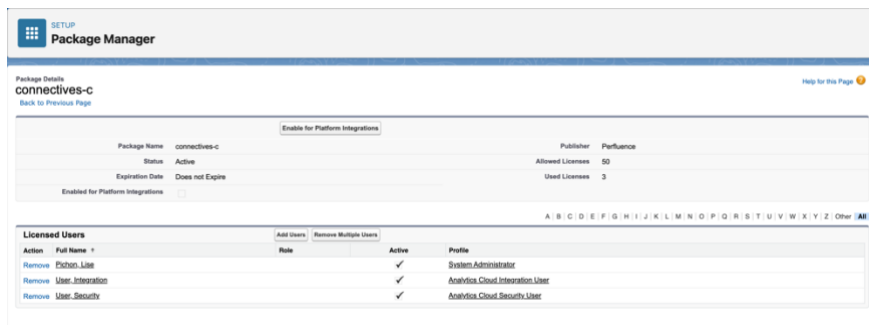
Click Manager Licenses next to the Powerscope package.

The screenshot shows the 'Installed Packages' page in Salesforce Setup. The page title is 'Installed Packages' with a sub-header 'On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.' Below the header, there is a table listing installed packages. The 'connectives-c' package is highlighted, and the 'Manage Licenses' link is visible next to it.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
☐	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	02/04/2024 09:54	✓	0	0	0	Not Passed
☐	Trailhead Playground	salesforce	1.9	trhdtps	Free	N/A	N/A	N/A	N/A	02/04/2024 09:54	✓	1	3	0	Not Passed
☐	connectives-c	Perflunce	1.7 (Beta 1)	connectives	Active	50	1	☐	Does not Expire	02/04/2024 10:27	✓	0	2	15	Passed

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

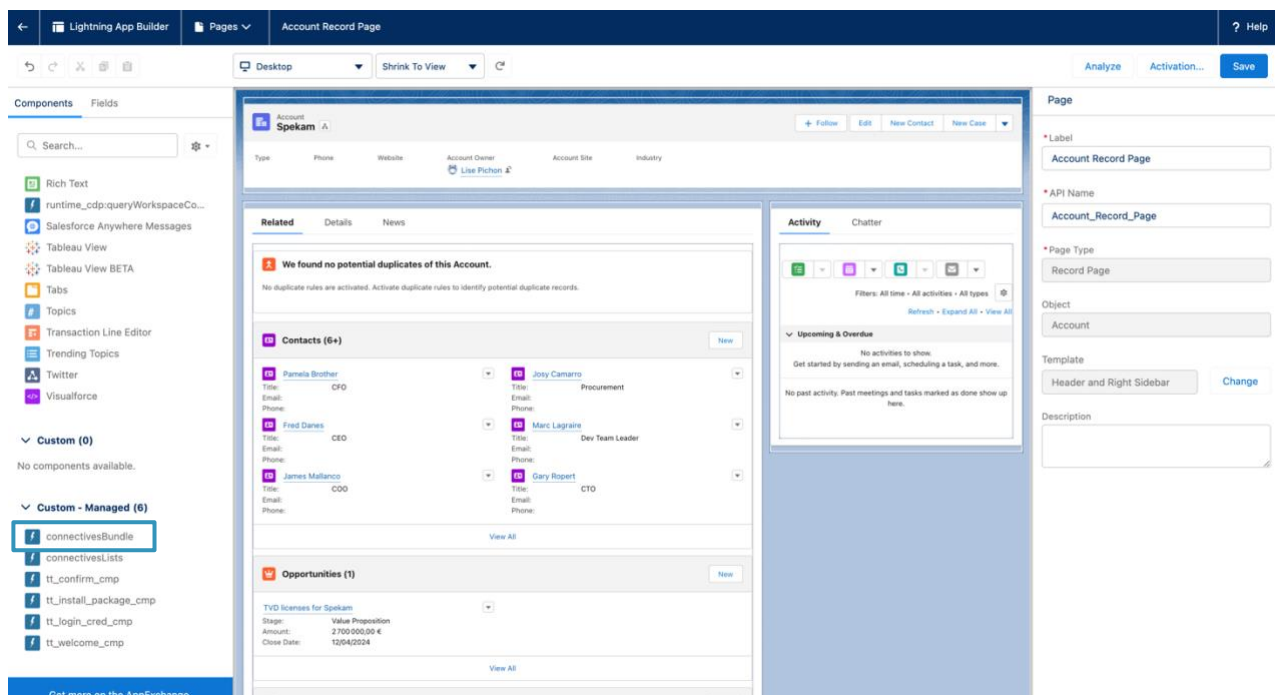
- Accounts

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.

The screenshot displays the Lightning App Builder interface for configuring an 'Opportunity Record Page'. On the left, the 'Components' panel shows a search bar and a list of components. The 'Custom - Managed (6)' section is expanded, and the 'connectivesBundle' component is highlighted. The main canvas shows a preview of the 'Opportunity Record Page' for 'TVD licenses for Spekam'. The page includes a header with account details (Account Name: Spekam, Close Date: 12/04/2024, Amount: 2,700,000.00 €, Opportunity Owner: Lisa Pichon), a progress bar for stages (Value Proposition, Id. Decision M..., Perception An..., Proposal/Price..., Negotiation/Re..., Closed), and a 'Mark Stage as Complete' button. Below the progress bar, there are tabs for 'Activity', 'Details', and 'Chatter'. The 'Activity' tab is active, showing 'Upcoming & Overdue' tasks. The 'Related' section on the right shows 'Products (0)', 'Notes & Attachments (0)', and 'Contact Roles (3+)'. The right sidebar shows the 'Page' configuration panel with fields for Label, API Name, Page Type, Object, Template, and Description.

- **Contacts**

Open a **Contact** record page.

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

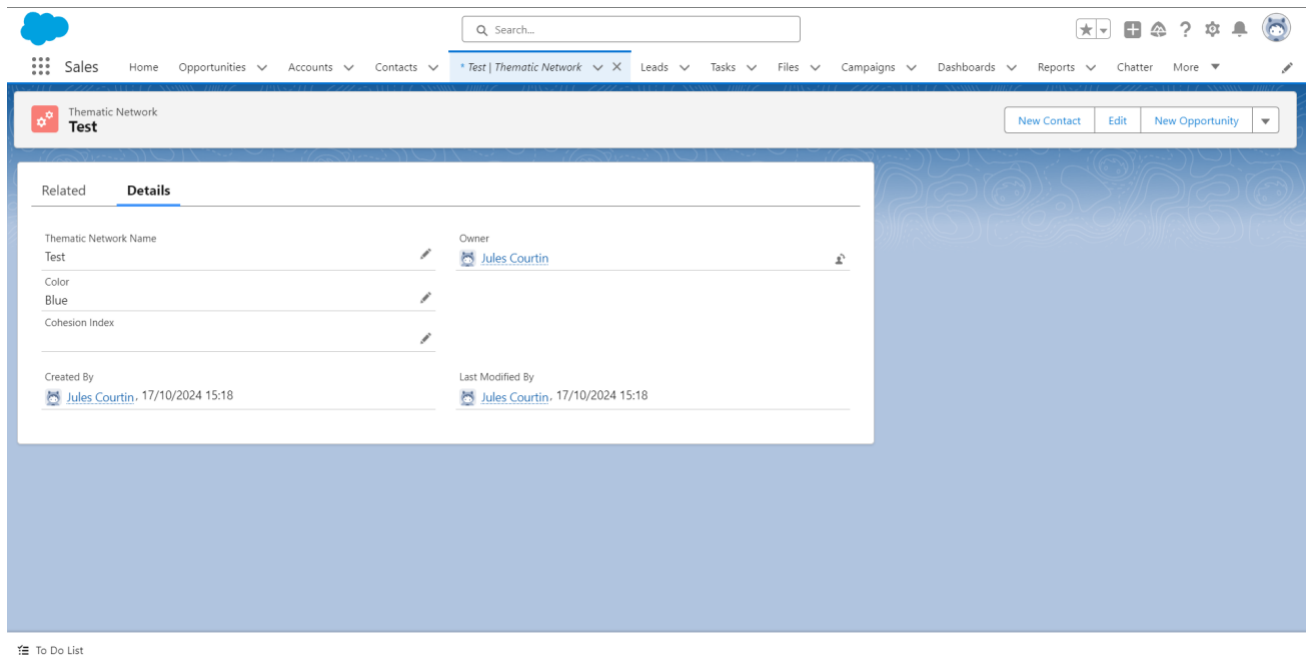
Save and Activate changes.

The screenshot displays the Salesforce Lightning App Builder interface for a 'Contact Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Contact Record Page'. The main workspace shows a preview of the contact record page for 'Arthur Song', a CEO at 'United Oil & Gas Corp.'. The page layout includes a header with contact information, a 'Related' section with tabs for 'Details' and 'News', and an 'Activity' section with a 'Chatter' feed. The left sidebar shows a list of components, with 'connectivesContact' highlighted under the 'Custom' section. The right sidebar shows the 'Page' configuration, including fields for 'Label' (Contact Record Page), 'API Name' (Contact_Record_Page), 'Page Type' (Record Page), 'Object' (Contact), 'Template' (Header and Right Sidebar), and 'Description'.

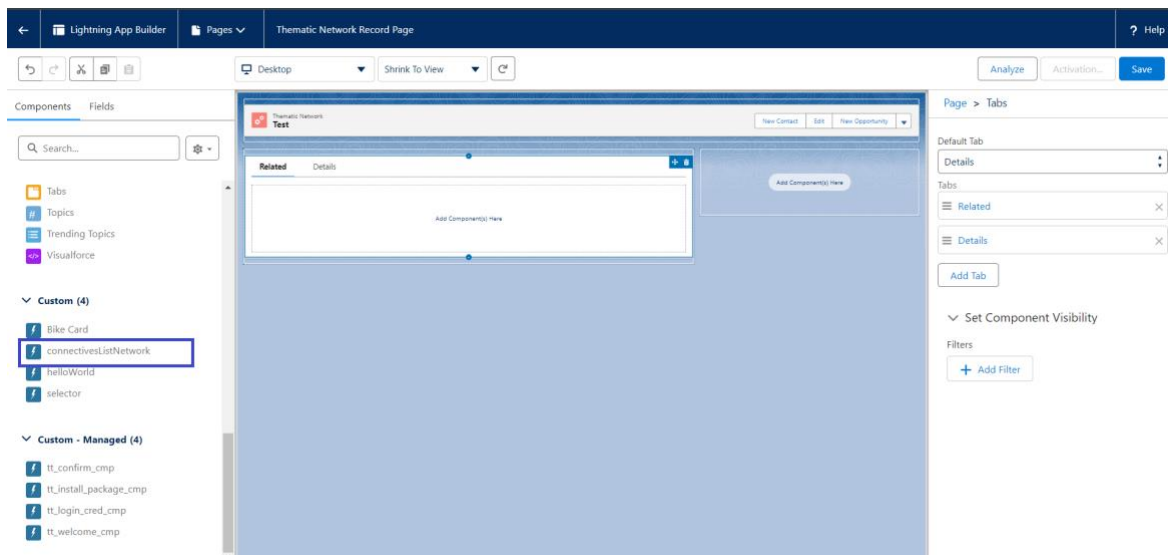
4. Add Thematic Networks

Go to the Thematic Network Tab and create a Thematic Network

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



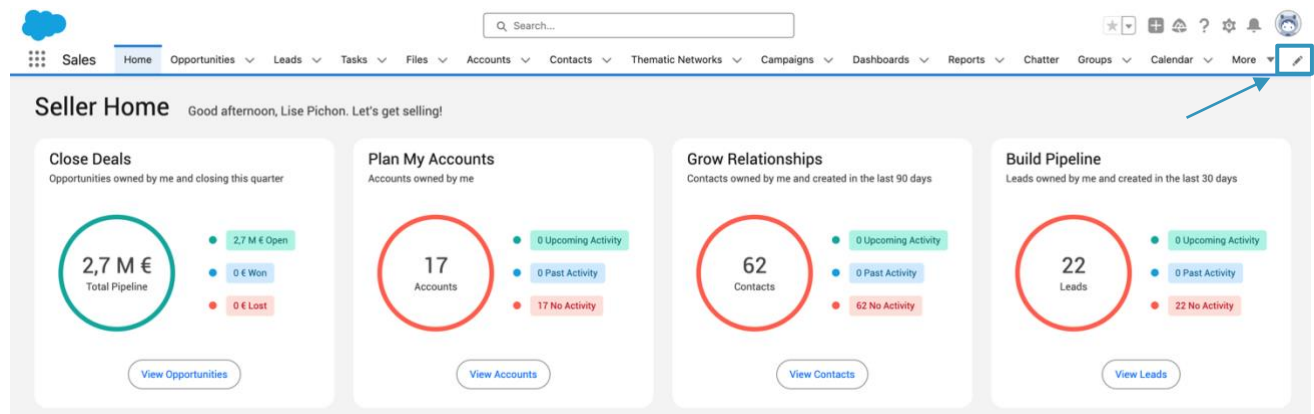
Add the **ConnectivesListNetwork** component.



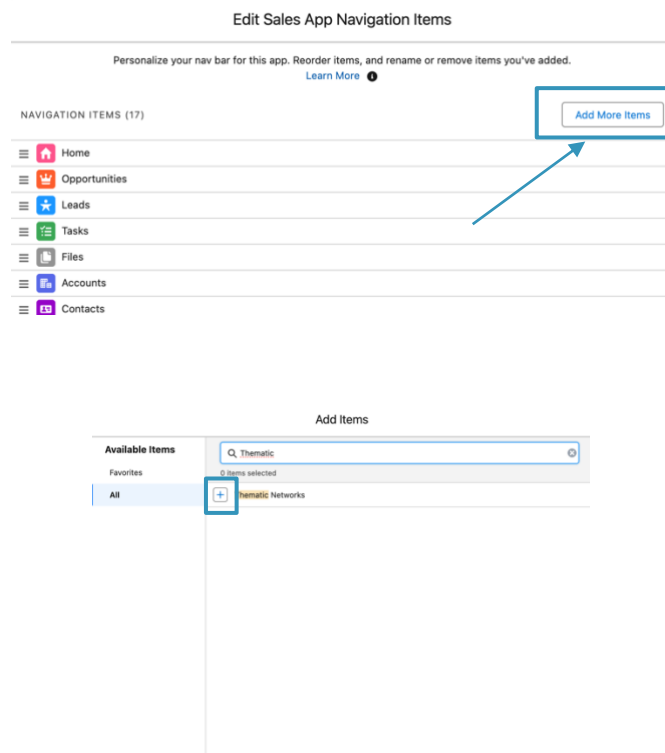
- Customize Navigation items

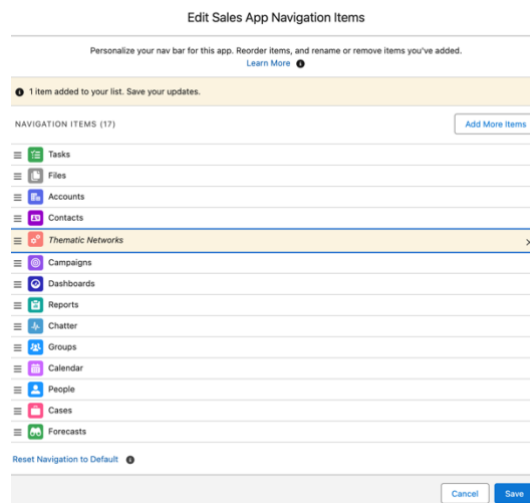
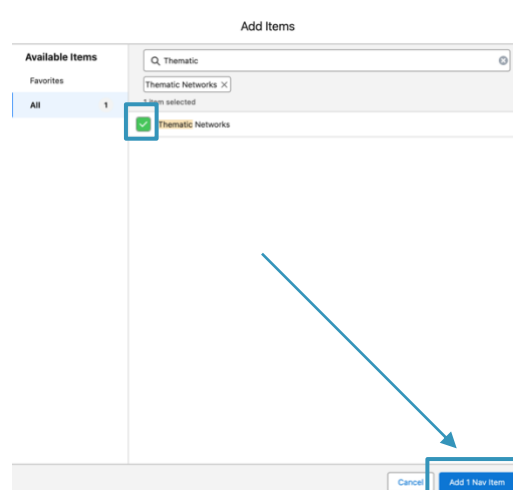
This operation must be performed by the users.

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.