



Installation Guide

Territory Health Assessment

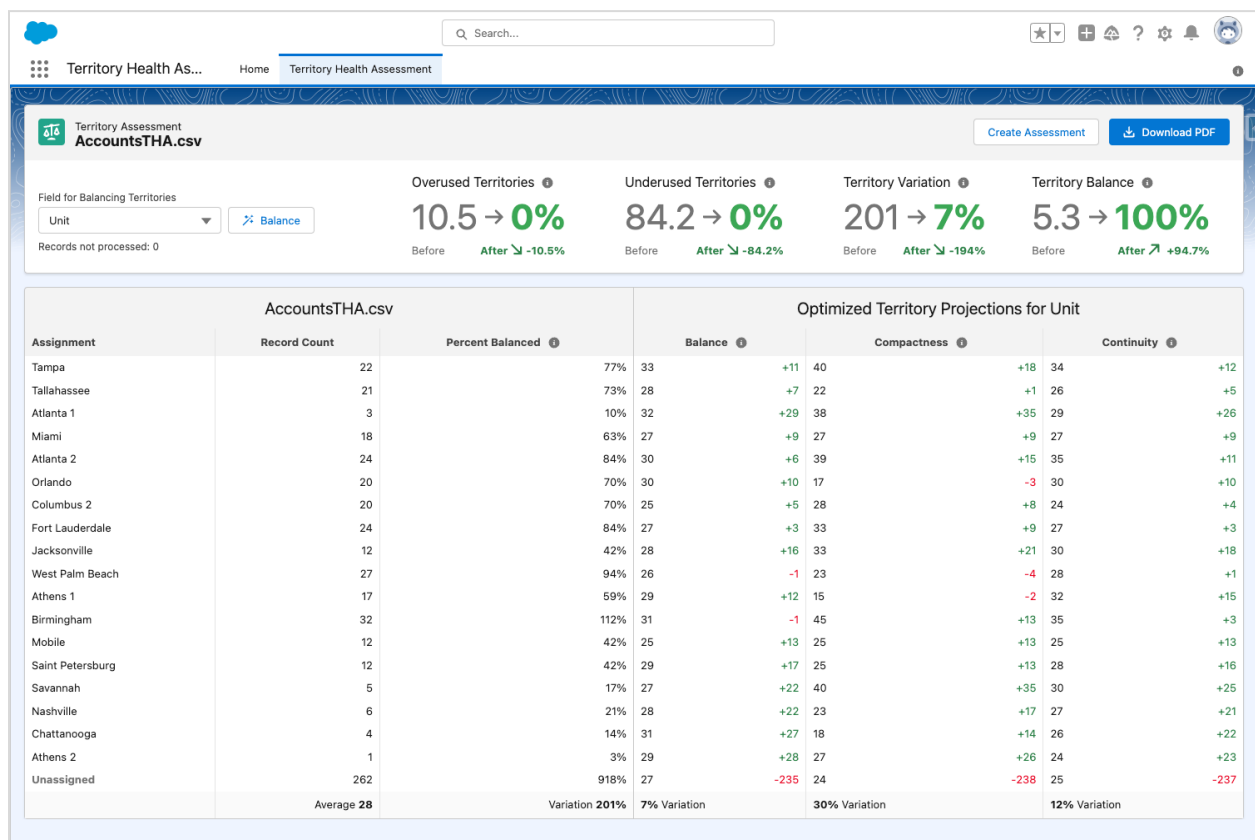


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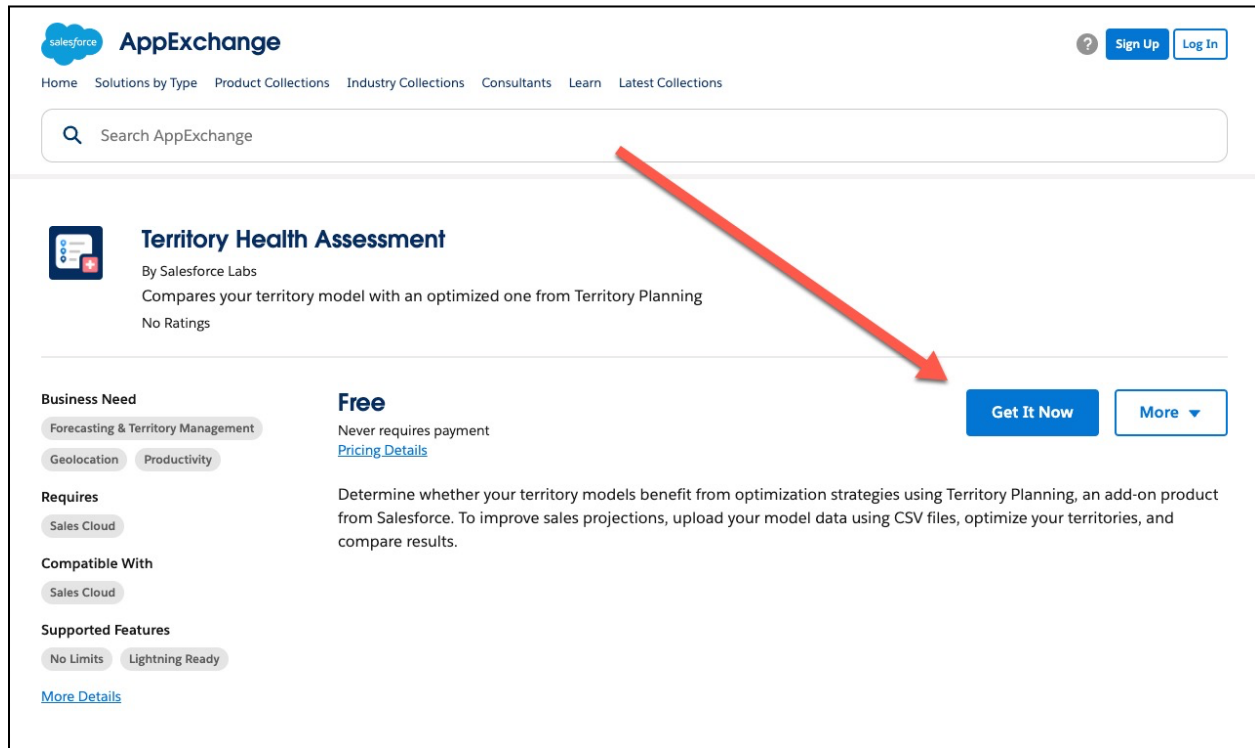
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AppExchange Installation

In your web browser, navigate to the Salesforce AppExchange, then search and find the Territory Health Assessment app listing. Direct link:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000JupG6UAJ>

Click the “Get it Now” button.



Select your desired installation settings, read and select the acknowledgement, review the included components, and click “Install”.

Install Territory Health Assessment

By MapAnything, Inc.

☒ Install for Admins Only

☐ Install for All Users

☐ Install for Specific Profiles...

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Territory Health Assessment	MapAnything, Inc.	Territory Health Assessment master_1.0.0.0	1.0

[Additional Details](#) [View Components](#)

Review and grant access to the necessary third-party API services, then click “Continue”.

Approve Third-Party Access

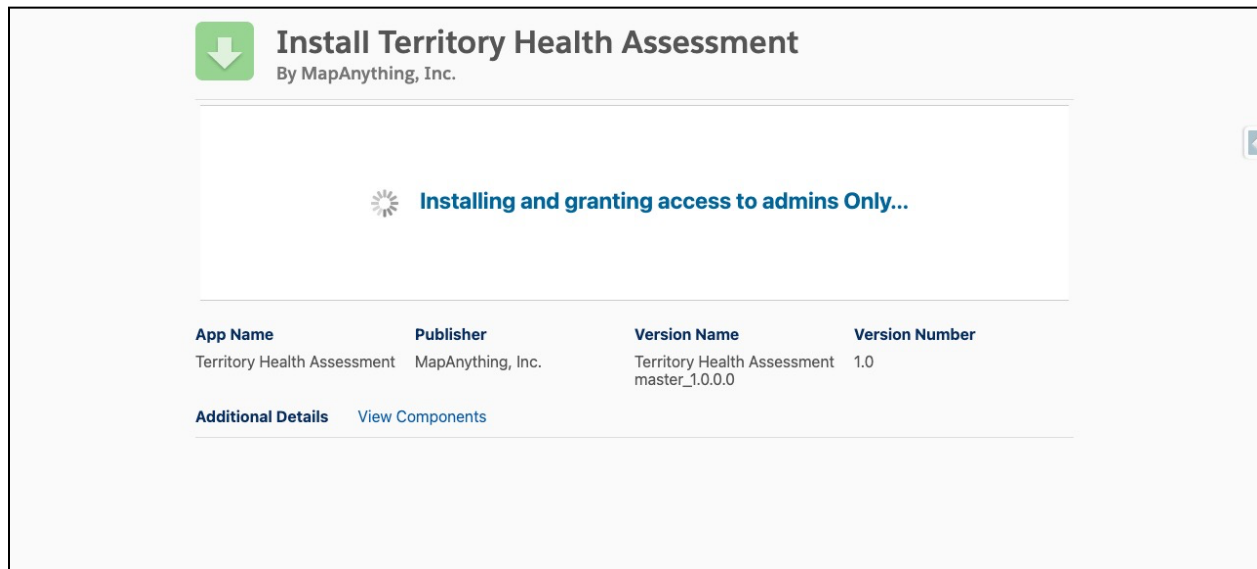
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
internal.eu.sfmapi.com	☒
internal.na.sfmapi.com	☒
internal.sfmapi.com	☒

☒ Yes, grant access to these third-party web sites

Continue **Cancel**

The application will now install. If the installation is taking more than a few seconds you may be notified when the package installation is complete via email.



Permission Set Assignment

After Territory Health Assessment has finished installation, you'll want to assign the "Territory Health Assessment" permission set to applicable users. You may do so via the user record, or the permission set record. This guide will use the permission set record method.

Start by navigating to *Setup > Permission Sets*.

Then find and click on the "Territory Health Assessment" permission set.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Setup' menu item is highlighted with a red arrow. Below it, under the 'ADMINISTRATION' section, the 'Permission Sets' option is also highlighted with a red arrow. The main content area displays the 'Permission Sets' page, which includes a table of existing permission sets.

Action	Permission Set Label	Description	License	Created Date	Created By
☐ Clone	Territory Health Assessment			4/28/2023	Derek Piccola
☐ Clone	Trust Card Manager	Lets users create, read, edit, a...	Trust Card Manager	2/4/2021	-

Click “Manage Assignments”.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION, Users, Permission Set Groups, **Permission Sets**, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, and Data. The main content area is titled 'Permission Sets' and shows the 'Territory Health Assessment' permission set. A red arrow points to the 'Manage Assignments' button. The 'Permission Set Overview' section displays details such as Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. The 'Apps' section lists various app settings including Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Credential Access, and Data Category Visibility.

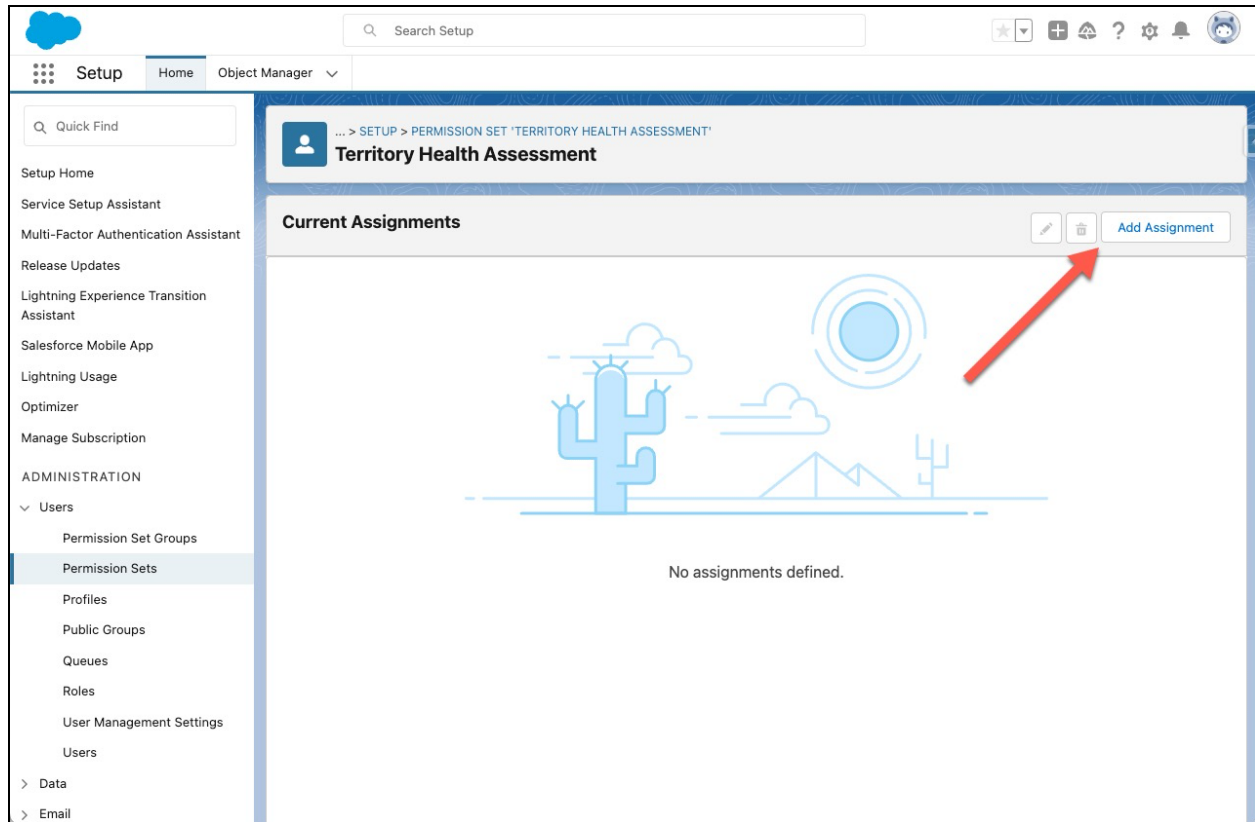
Permission Set Overview

Field	Value
Description	THAHome
License	THAHome
Session Activation Required	☐
Last Modified By	Derek Piccola, 4/28/2023, 7:06 AM
API Name	THAHome
Namespace Prefix	tha
Created By	Derek Piccola, 4/28/2023, 7:06 AM

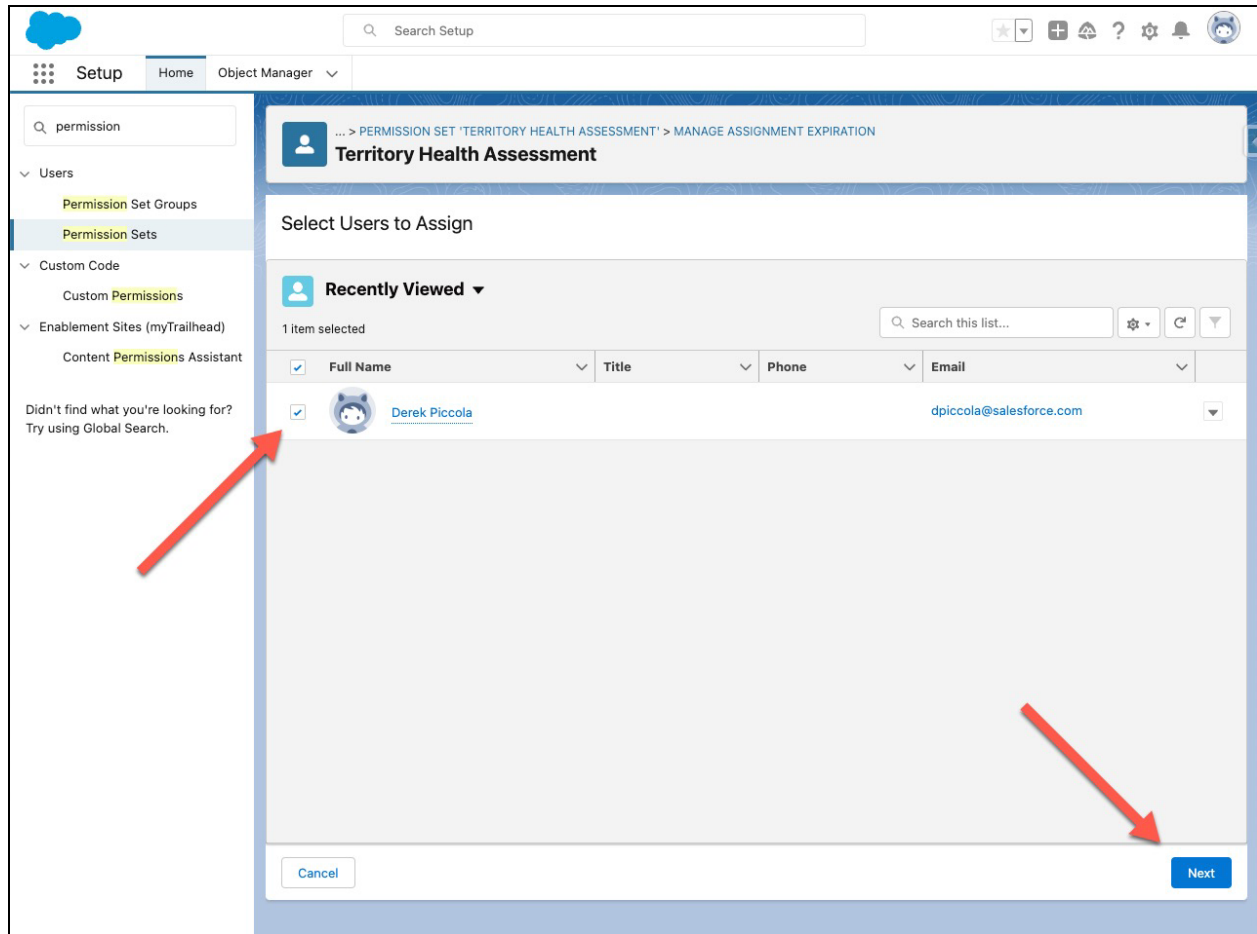
Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Flow Access**
Permissions to execute Flows
- Named Credential Access**
Permissions to authenticate against named credentials
- Data Category Visibility**

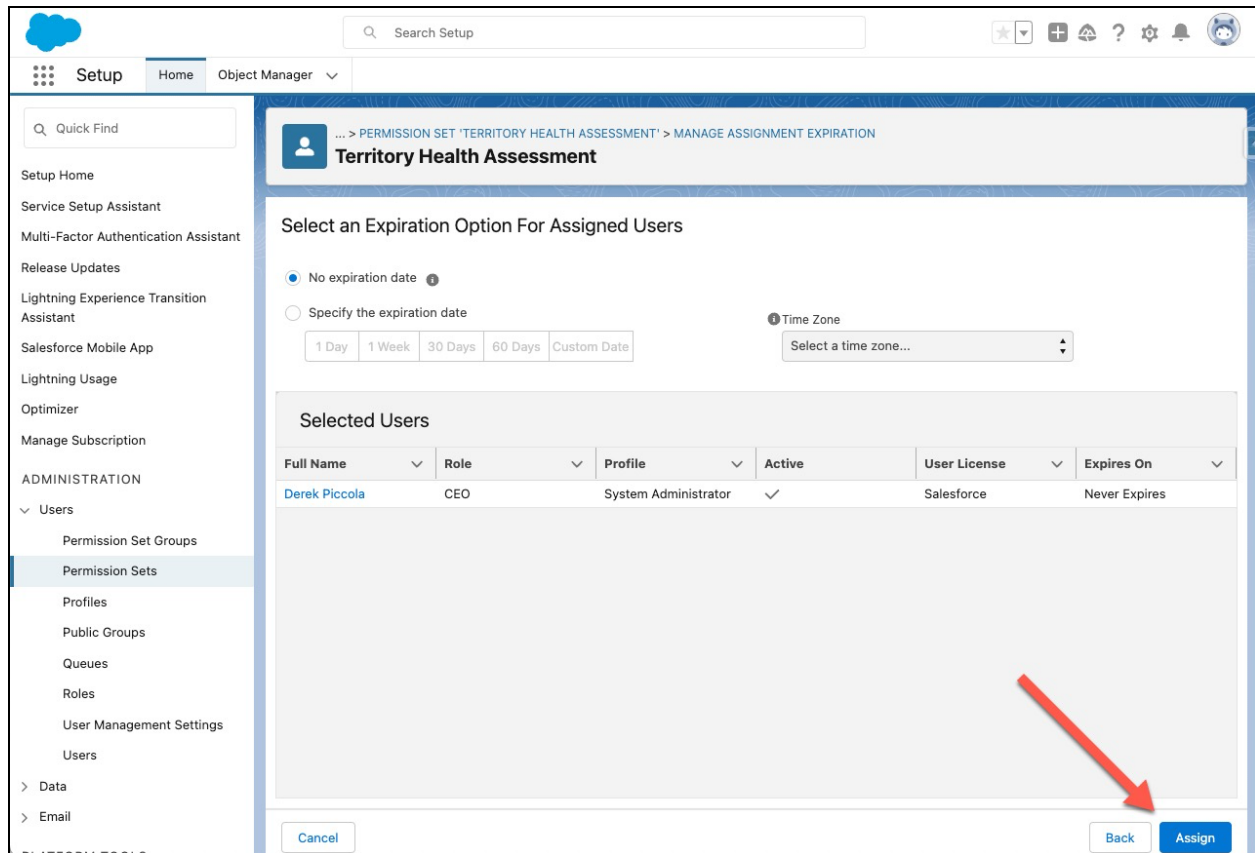
Click "Add Assignment".



Use the checkbox(s) to select the user(s) to which you wish to grant the permission set, then click “Next”.



Select your desired expiration date, then click “Assign”.

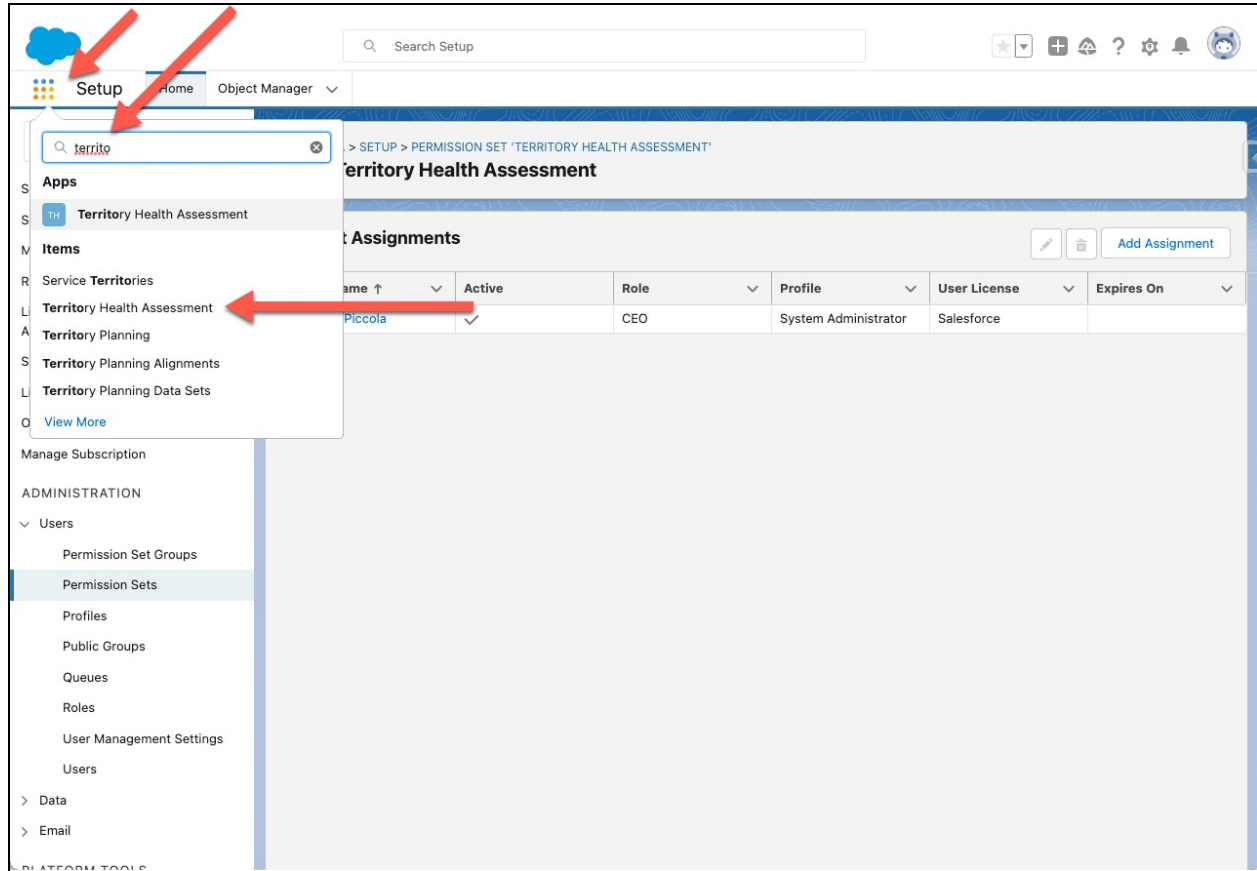


The permission set should now be successfully assigned.

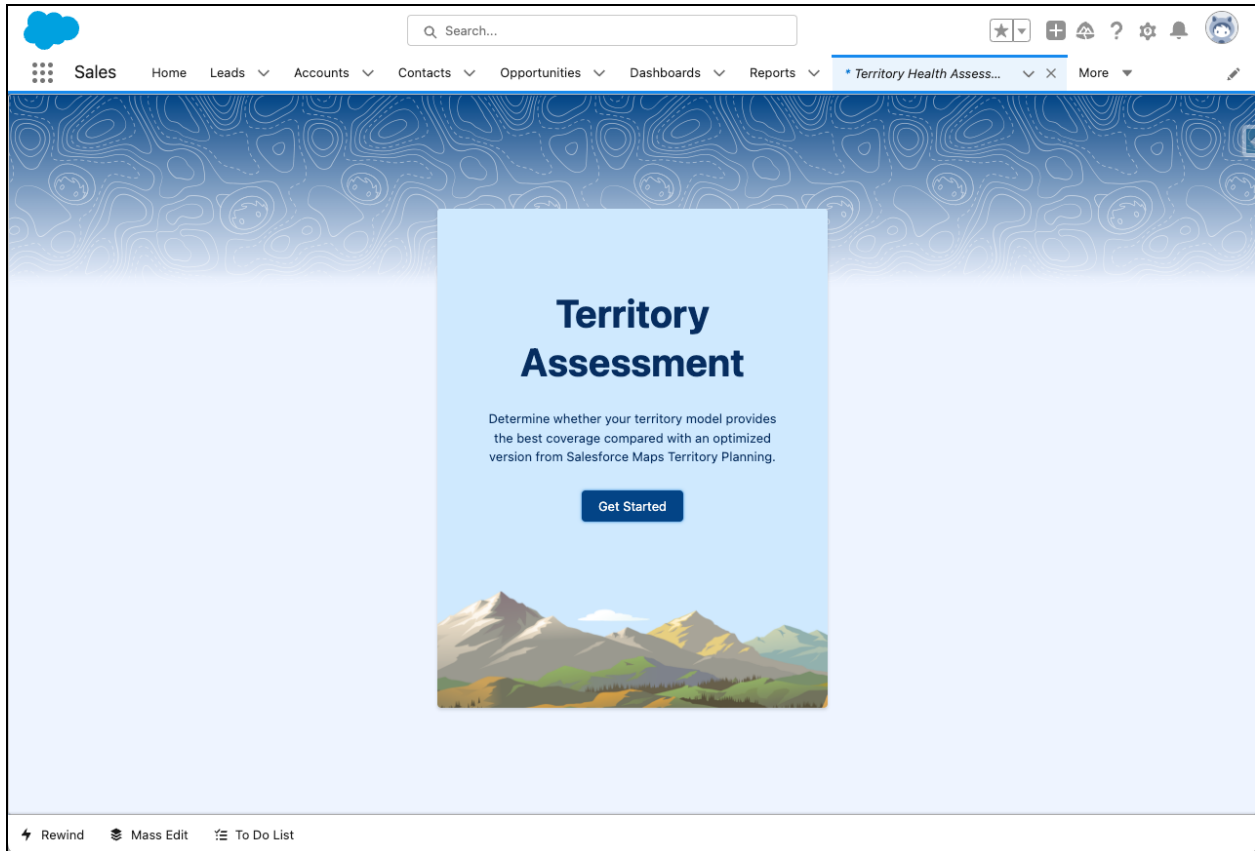
App Page Navigation

After installation and permission set assignment, you're ready to open the app.

Click on the app launcher and begin typing "Territory Health Assessment" in the search box. Then, click the "Territory Health Assessment" item.



You should land on the Territory Health Assessment page, ready to go!



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