



AVIATENOW** - BROKER**

PRE-INSTALLATION AND SETUP GUIDE

Introduction

This **AVIATENOW - BROKER** Certified Salesforce.com Administrator Pre-Installation and Setup Guide covers the necessary configuration required in your Salesforce org (**Enterprise Edition or Unlimited Edition is required**) in order to successfully install the **AVIATENOW - BROKER** managed package and enable its functionality. Installation of the **AVIATENOW - BROKER** managed package is designed to fail if an org is not properly preconfigured. We highly recommend testing the **AVIATENOW - BROKER** managed package in a **FULL SANDBOX** prior to installing this managed package in your Production environment. You can also take a test drive of the product found on our [Salesforce.com AppExchange](#) listing. Please consult with your Certified Salesforce.com Administrator or **AVIATENOW** Customer Service Representative at support@aviatenow.com for more information.

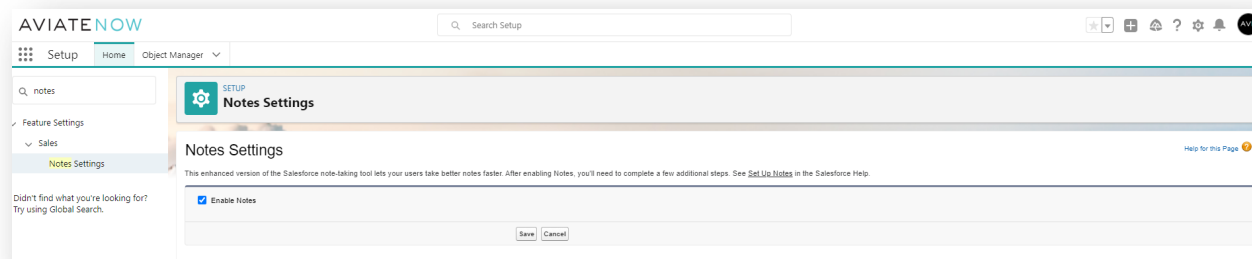
Pre-Install Configuration

Notes Settings

Notes are used across the **AVIATE^{NOW} - BROKER** managed package, and they must be enabled in order to successfully install the managed package.

Steps:

1. From **SETUP**, type **Notes Settings** into the Quick Find search box.
2. Click on Notes Settings
3. Confirm that the **Enable Notes** is checked.
 - a. If the Enable Notes checkbox is not checked, then CHECK the checkbox.
 - b. Click **Save** to **Enable Notes** in your org.

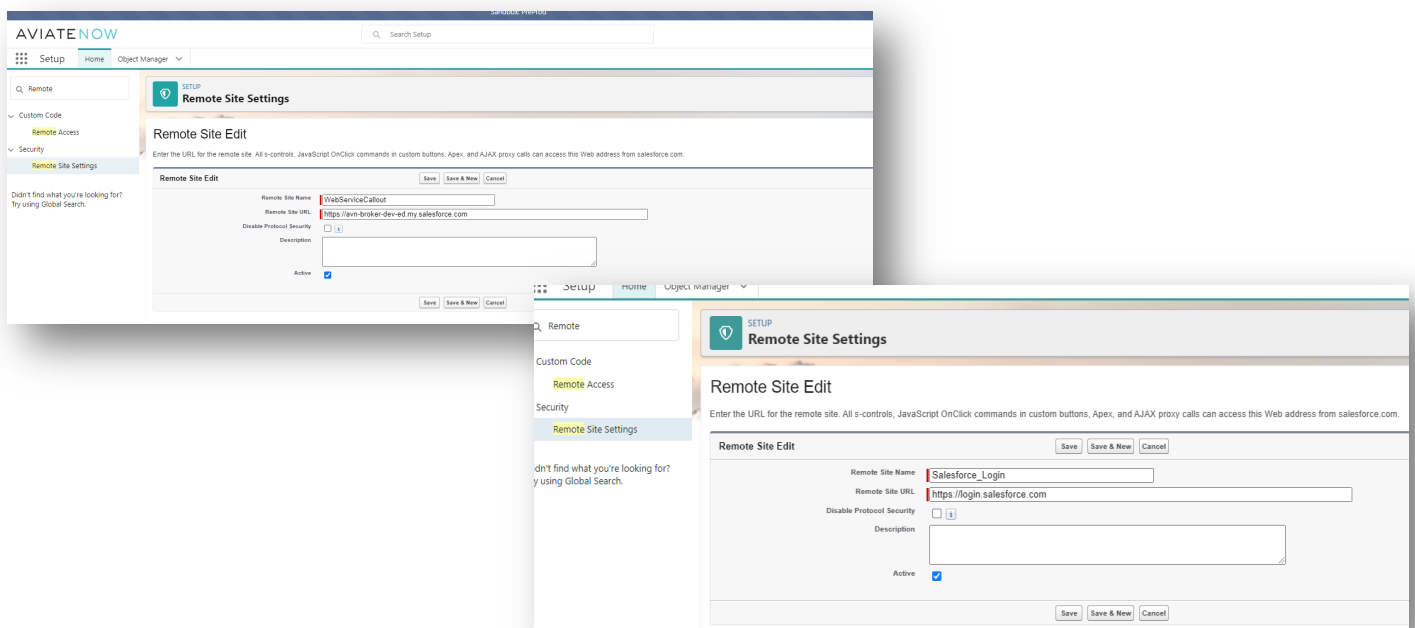


Remote Site Settings

A robust dataset of Airports, Runways, Cities, FBOs, Aircraft Types, and Aircraft Images are included in the **AVIATE NOW - BROKER** managed package. A post-install script runs after the package is installed to fetch the corresponding data and create the dataset in your Salesforce org. In order for this script to run successfully, your Salesforce admin must configure **Remote Site Settings** prior to installing the managed package.

Steps:

1. From **SETUP**, search for **Remote Site Settings** from the Quick Find search box.
2. Click on **New Remote Site**.
3. In the **Remote Site Name** field, create a name for the remote site (example: **Salesforce_Login**)
4. In the **Remote Site URL** field, type in <https://login.salesforce.com>
5. Make sure the **Disable Protocol Security** checkbox is **UNCHECKED**.
6. Confirm that the **Active** checkbox is **CHECKED**.
7. Click **Save** and you should be brought back to the Remote Site Settings page with the new Remote Site.
8. From the **Remote Site Settings** page, create another Remote Site by clicking **New Remote Site**.
9. In the **Remote Site Name** field, name this new remote site **WebServiceCallout**.
10. In the **Remote Site URL** field, input <https://avn-broker-dev-ed.my.salesforce.com>
11. Make sure the **Disable Protocol Security** checkbox is **UNCHECKED**.
12. Confirm that the **Active** checkbox is **CHECKED**.
13. Click **Save**.
14. Review both **Remote Sites** to ensure that the provided URLs are correct and that the Remote Sites are **ACTIVE**.

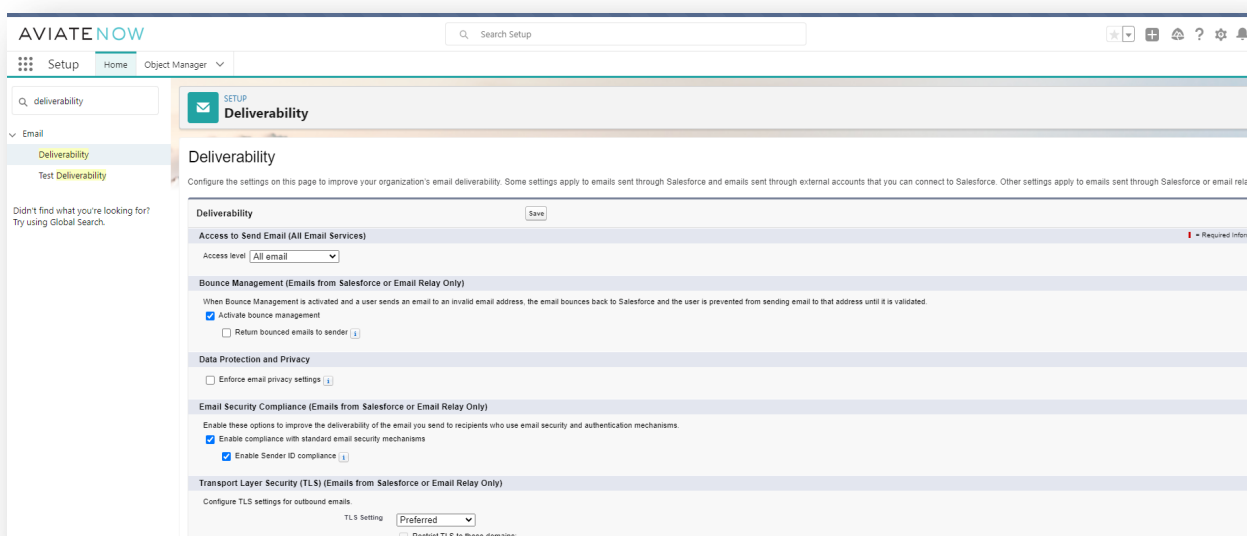


Email Deliverability

In order for the **AVIATE NOW - BROKER** quoting tool to email quotes, your org needs to have the correct email deliverability settings configured.

Steps:

1. From **SETUP**, search for the term **Deliverability** in the Quick Find search box.
2. From **Email**, click on **Deliverability**
3. Under the **Access to Send Email (All Email Services)** section, set the **Access Level** to **All Email**.
4. Click **Save**.



Package Installation

You are now ready to install the **AVIATE NOW - BROKER** managed package. [CLICK HERE](#) to install our latest package and send an email to support@aviatenow.com to request provisional licenses. Again, we highly suggest testing the **AVIATE NOW - BROKER** managed package in a **FULL SANDBOX** environment. If you do not have a **FULL SANDBOX** environment in which to test the managed package, then please send an email to support@aviatenow.com to request a test drive.

Post-Install Configuration

After the installation of the **AVIATE**NOW - **BROKER** managed package, an automated script builds your **AVIATE**NOW database to use with **AVIATE**NOW components and quoting tools. This may take up to 24 hours depending on your location and Salesforce org type (Enterprise and above is required).

Email Service

Email Services are automated processes that use Apex classes to process Attachments, Headers, and Contents of an inbound email primarily from replies to a Quote.

Steps:

1. From **SETUP**, type **Email Services** into the Quick Find search box.
2. Click on **Email Services** under the **Custom Code** section.
3. Click **New Email Service** to create a new email service.
4. Name the new email service **TrackQuotationReply**
5. Search for the **Apex Class** named **TrackQuotationReply**
 - a. This apex class is required as it contains the logic that tracks the reply.
6. Confirm that the **Active** checkbox is **CHECKED**.
7. Click **Save**.

The screenshot shows the Salesforce Setup page for Email Services. The page has a blue header with the 'SETUP' icon and 'Email Services' text. Below the header, there are three buttons: 'Save', 'Save and New Email Address', and 'Cancel'. The main content area is divided into two sections: 'Email Service Information' and 'Failure Response Settings'. In the 'Email Service Information' section, there are fields for 'Email Service Name' (containing 'TrackQuotationReply'), 'Apex Class' (containing 'TrackQuotationReply'), 'Accept Attachments' (set to 'None'), 'Advanced Email Security Settings' (unchecked), and 'Accept Email From' (empty). There is also a checkbox for 'Convert Text Attachments to Binary Attachments' (unchecked) and a checkbox for 'Active' (checked). In the 'Failure Response Settings' section, there are two dropdown menus: 'Over Email Rate Limit Action' and 'Deactivated Email Address Action', both set to 'Discard message'. A legend indicates that red asterisks denote required information.

SETUP Email Services

Save Save and New Email Address Cancel

Email Service Information ⓘ = Required Information

Email Service Name

Apex Class

Accept Attachments

Advanced Email Security Settings ☐

Accept Email From

Convert Text Attachments to Binary Attachments ☐

Active ☒

Failure Response Settings

Configure how Salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

Over Email Rate Limit Action

Deactivated Email Address Action

- In the **Email Addresses** section, click **New Email Address** to create a new email address for this Email Service:

SETUP Email Services

Email Service Name: TrackQuotationReply

Apex Class: TrackQuotationReply

Accept Attachments: None

Advanced Email Security Settings: ☐ [i]

Accept Email From: All email addresses (subject to security settings)

Convert Text Attachments to Binary Attachments: ☐ [i]

Active: ☒

▼ Failure Response Settings

Over Email Rate Limit Action: Discard message

Deactivated Email Address Action: Discard message

Deactivated Email Service Action: Discard message

Unauthorized Sender Action: Discard message

Unauthorized Sender Action: Discard message

Enable Error Routing: ☐ [i]

Email Addresses New Email Address

Action	Email Address Name	Email Address
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SETUP Email Services

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name: TrackQuotationReply

Accept Email From: All email addresses (subject to security settings)

Email Address Information

Email Address Name:

Email address: Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.

Active: ☒

Context User: [i]

Accept Email From:

Save Save and New Cancel

- Type in a name in the **Email Address Name** field (ex. *QuotationReply*).
- Type in the local part of an email address in the **Email address** field (ex. *localpart@domain.com* or *reply@domain.com*).
 - Salesforce automatically adds the domain as part of the Email Service Address.
- Select a **Context User**, if one isn't already selected.
- Confirm the **Active** checkbox is **CHECKED**
- Leave the **Accept Email From** section empty.
- Click **SAVE** and a new Email Address will be created for the Email Service.
- Copy the newly generated **Email Address** from the **Email Addresses** section.

SETUP Email Services

Email Service: TrackQuotationReply

Email Service Name: TrackQuotationReply

Apex Class: TrackQuotationReply

Accept Attachments: None

Advanced Email Security Settings: ☐ [i]

Accept Email From: All email addresses (subject to security settings)

Convert Text Attachments to Binary Attachments: ☐ [i]

Active: ☒

▼ Failure Response Settings

Over Email Rate Limit Action: Discard message

Deactivated Email Address Action: Discard message

Deactivated Email Service Action: Discard message

Unauthorized Sender Action: Discard message

Unauthorized Sender Action: Discard message

Enable Error Routing: ☐ [i]

Email Addresses New Email Address

Action	Email Address Name	Email Address
View Edit	QuotationReply	trackquotationreply@24pf08xn9a54y09qum14sh2vufconexu6dlv1mf5um5suct0_5e-1mm05eak.na162 apex.salesforce.com

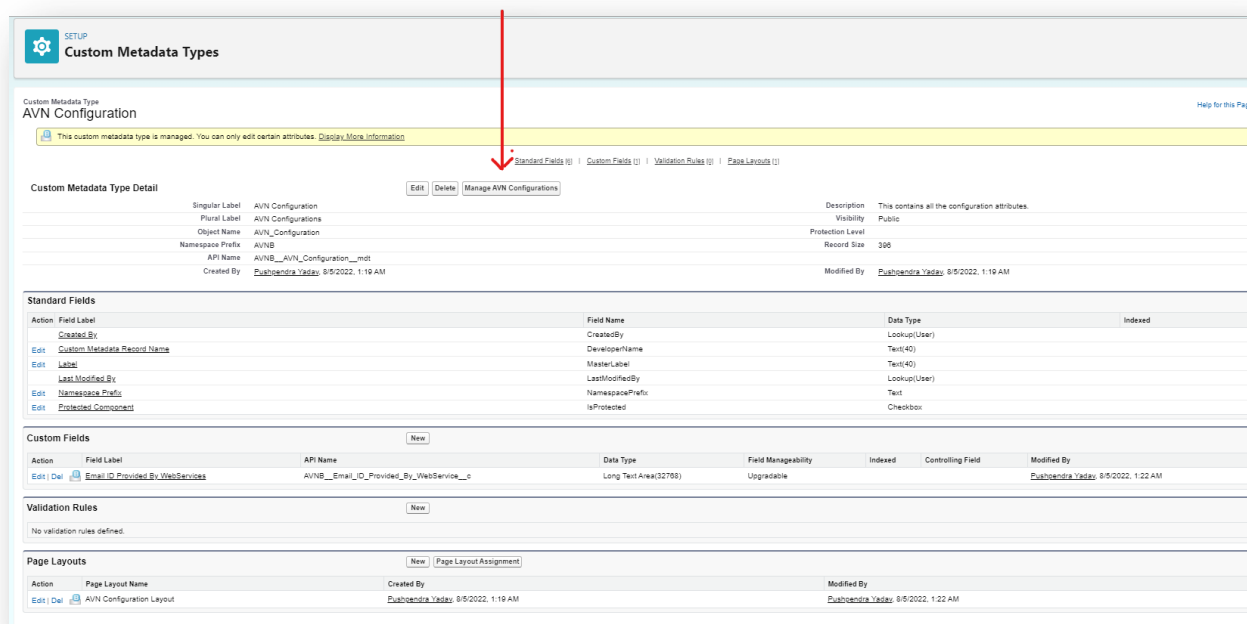
NOTE: It is recommended to securely store Email Addresses for your Email Services and enable Multi-Factor Authentication in your [Salesforce org](https://www.salesforce.org).

Configure Custom Metadata

The final step in post-install configuration is to Configure Custom Metadata types for your org. The **AVIATE NOW - BROKER** managed package contains preconfigured custom metadata types that can be easily modified by a Certified Salesforce.com Administrator to enable Email Services for **AVIATE NOW** Quoting tools.

Steps:

1. From **SETUP**, type **Custom Metadata** into the Quick Find search box.
2. Click on **Custom Metadata** to access Custom Metadata in your org.
3. From Custom Metadata, search for the Custom Metadata type named **AVN_Configuration**.
4. Click on the **AVN_Configuration** custom metadata type.
5. Click on **Manage AVN Configuration** in the Custom Metadata Type Detail section.



6. Edit the custom metadata type with the label name **Broker**.



7. Change the information **Email ID Provided by WebServices** with the newly generated Email Address copied from your new Email Service.
8. Click **Save**.

Summary

Once these steps are complete, the **AVIATE**NOW - **BROKER** managed package is now ready to use in your org. Simply assign licenses of the managed package to your users and grant them access using our pre-configured Permission Sets.

Please reach out to **AVIATE**NOW Customer Service if you feel you are running into issues or need additional assistance by sending an email to support@aviatenow.com and don't forget to consult our **AVIATE**NOW - **BROKER USER MANUAL** for more information related to functionality and system administration.

SYSTEM REQUIREMENTS

Salesforce.com Enterprise Edition or above (Enterprise, Unlimited)

Test Drives or Standalone Editions of **AVIATE**NOW - **BROKER** are available upon request.