



RiskPlanner Portfolio - Installation & Configuration Guide

Managed package version 1.5.0 | September 2026

This guide explains how to install, configure and test RiskPlanner Portfolio in a Salesforce environment. It is intended for Salesforce administrators and AppExchange evaluators.

1. Install the Application

1. Choose the installation option

Select **Install for Admins Only**, then click **Install**.

A screenshot of the Risk Planner installation options screen. It features three radio button options: 'Install for Admins Only' (selected), 'Install for All Users', and 'Install for Specific Profiles...'. Each option is accompanied by an icon of three user silhouettes. Below the options are 'Install' and 'Cancel' buttons.

2. Wait for installation to complete

Installation may take up to 10 minutes. Salesforce sends an email when the installation completes.

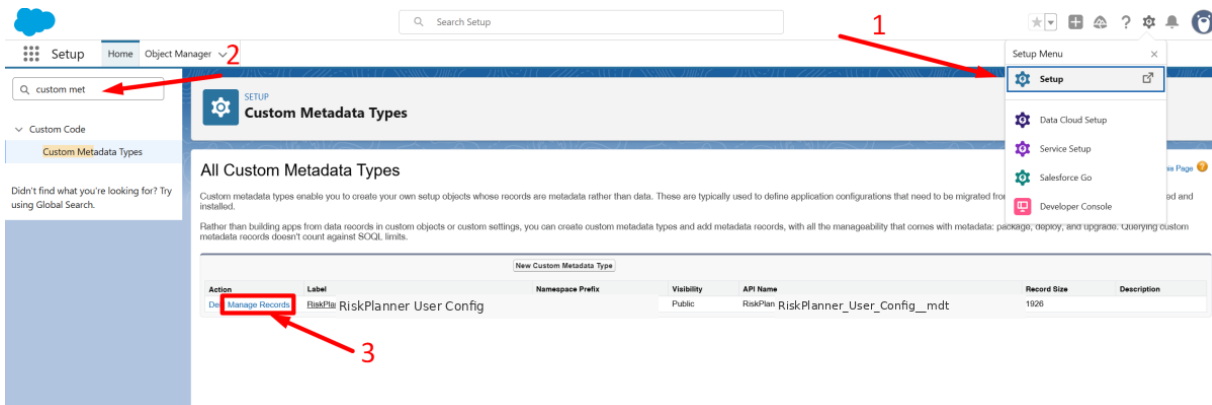
Note: Installing for administrators only is recommended for evaluation. After testing, grant access to the intended users through the access controls used by your Salesforce organization.

2. Post-Installation Configuration

Complete the following steps to make RiskPlanner components visible and ready for testing.

2.1 Verify the Editable Custom Metadata

Navigate to **Setup > Custom Metadata Types**. Find **RiskPlanner User Config** and select **Manage Records**.



Open the available configuration record and review the values. The packaged defaults are sufficient for normal production use and AppExchange testing, so no changes are required unless your organization uses different object or field API names.

Account Object API	Account
Registration Field API	RP_Registration_Number__c
Country Field API	RP_Country__c
Country Normalization Map	{ "Lietuva": "Lithuania", "LT": "Lithuania", "LTU": "Lithuania", "Latvija": "Latvia", "Lithuania": "Lithuania", "Latvia": "Latvia", "Estija": "Estonia", "UK": "UnitedKingdom", "United Kingdom": "UnitedKingdom" }
Financial Report Object API	RP_Short_Financial_Report__c

The separate **RiskPlanner Integration Config** contains the protected API credential. It is managed by the package and is not intended to be edited in subscriber organizations.

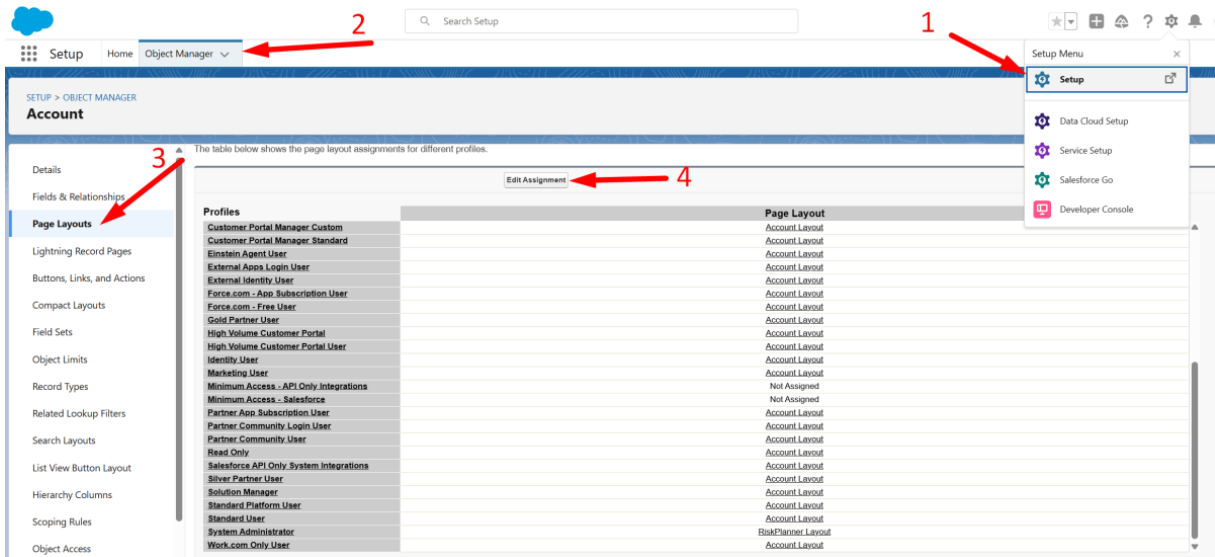
2.2 Assign the RiskPlanner Account Page Layout

Navigate to **Setup > Object Manager > Account > Page Layouts > Page Layout Assignment**.

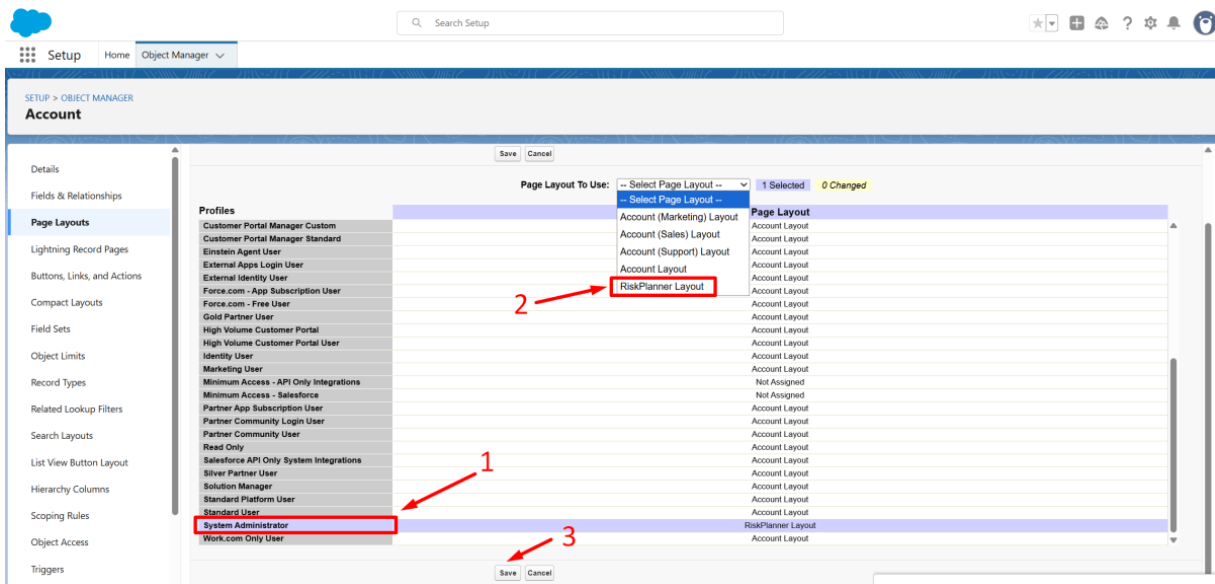
Select **Edit Assignment** and assign **RiskPlanner Account Page Layout** to the administrator profile used for testing. Assign it to other profiles only when appropriate for your rollout.

Assign the RiskPlanner Account Page Layout

Open Page Layout Assignment, select the required profile, choose the RiskPlanner layout, then save.



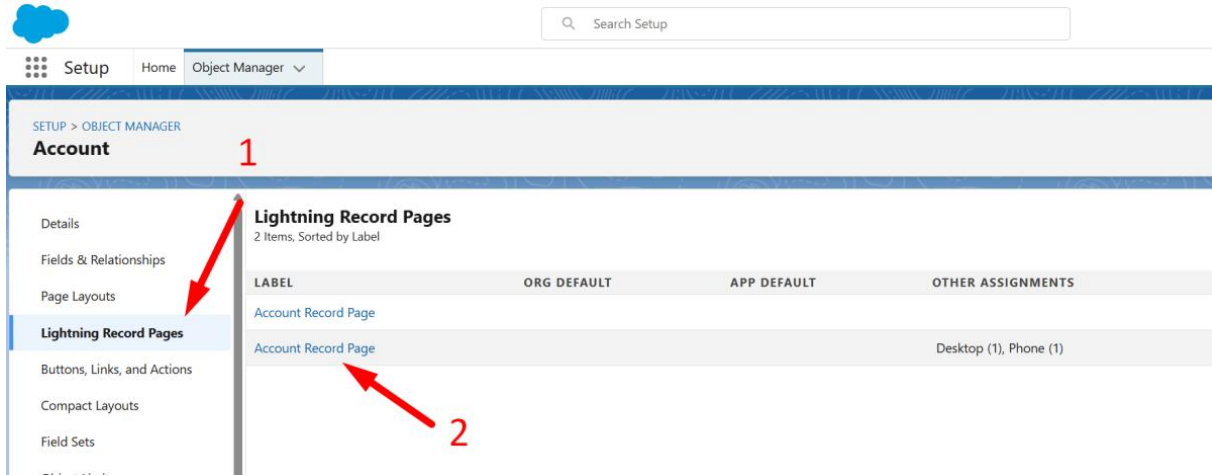
The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar contains various setup options, with 'Page Layouts' selected. The main content area displays the 'Page Layout Assignment' table. The table has two columns: 'Profiles' and 'Page Layout'. The 'Profiles' column lists various user profiles, and the 'Page Layout' column shows the assigned layout for each profile. The 'System Administrator' profile is highlighted with a red box, and the 'RiskPlanner Layout' is assigned to it.



The screenshot shows the 'Page Layout Assignment' table with the 'System Administrator' profile selected. A dropdown menu is open, showing the 'RiskPlanner Layout' as the selected option. The 'Save' button is visible at the bottom of the table.

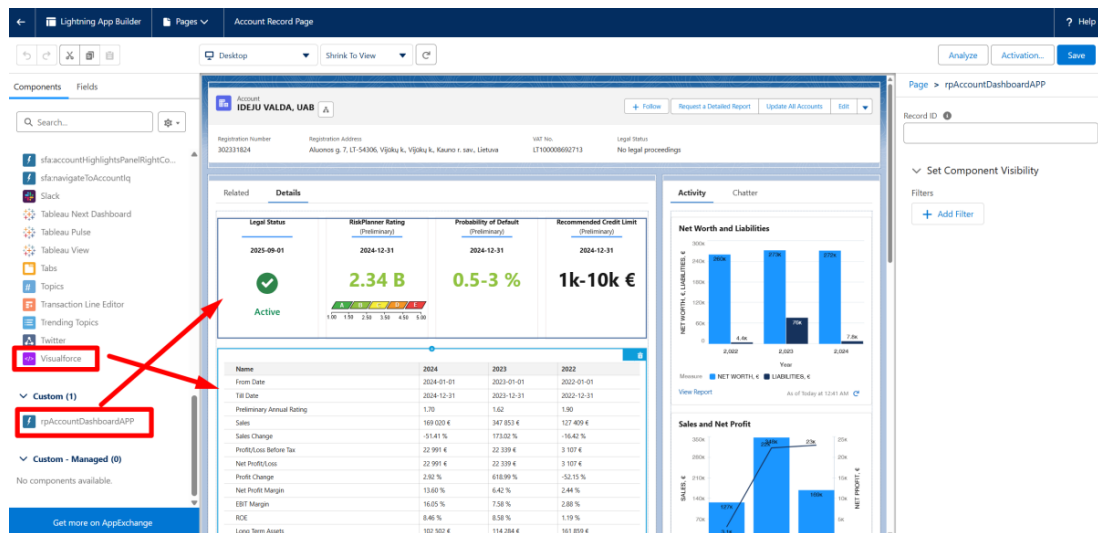
2.3 Update the Lightning Record Page

Create a new Lightning Record Page or edit an existing Account record page in Lightning App Builder.



In Lightning App Builder:

1. Drag the custom component **rpAccountDashboardAPP** onto the page.
2. Add a standard **Visualforce** component below the dashboard.
3. Adjust the page layout and component settings as required.



Save and activate the page for the intended app and profiles. Use **Org Default** only if the page should replace the Account record page throughout the organization.

2.4 Verify RiskPlanner API Access

The managed package includes the required **RiskPlannerAPI** Remote Site Setting. No manual Remote Site creation is required.

For verification, navigate to **Setup > Remote Site Settings** and confirm that **RiskPlannerAPI** is active and points to **<https://api.riskplanner.io>**.

Remote Site Name	Remote Site URL	Status
RiskPlannerAPI	https://api.riskplanner.io	Active

Do not add the former Azure App Service hostname. RiskPlanner Portfolio uses the stable production domain shown above.

3. Test the Application

1. Open **Accounts** from the App Launcher or from an app that includes Accounts.
2. Select **New** to create a test Account.
3. Complete these fields:

Required field	What to enter
Account Name	The company name
Registration Number	A valid company registration number
Country	Lithuania, Latvia or Estonia

Use a company that exists in the RiskPlanner data set. If the identifiers do not match an available company, the refresh can return **Not Found**.

Create the Test Account

The highlighted fields below are required for company matching. Other fields can remain empty before the first refresh.

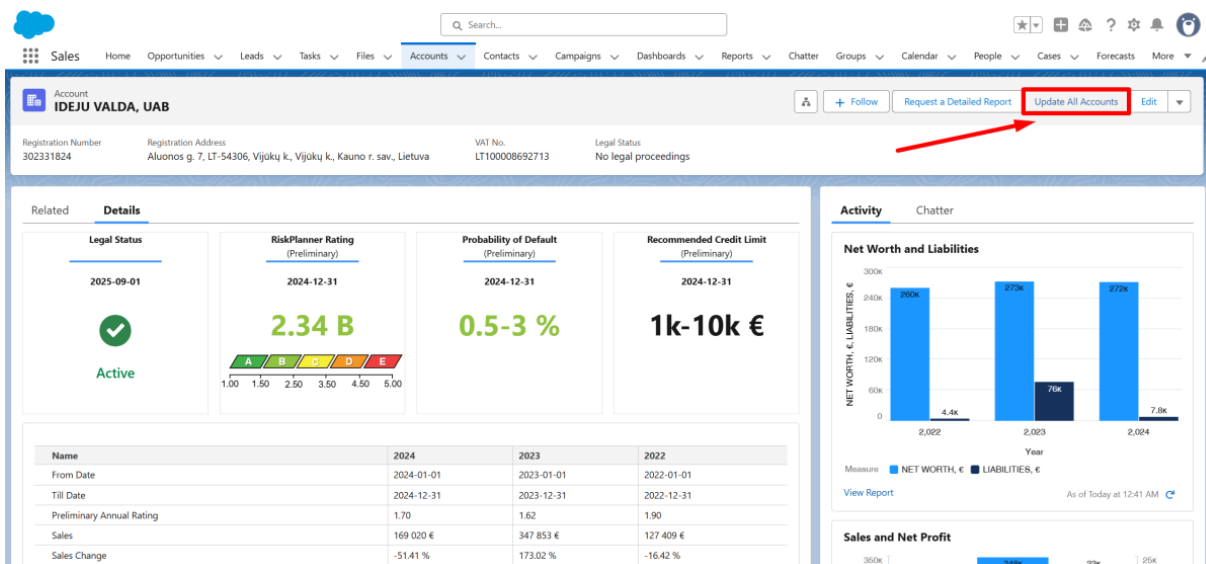
Company Details	
Registration Number	Legal Status
Business Name	Country
Legal Form	Registration Address
	Registration Date
RiskPlanner Evaluation	
Preliminary Annual Rating Value	Preliminary Probability of Default
Preliminary Annual Rating Group	Preliminary Recommended Credit Limit
Activities	
Activity Code	Activity Name
VAT Details	
VAT No.	VAT Registration Date
	VAT Deregistration Date
Ownership Structure of Lithuanian Companies	
Citizens of the Republic of Lithuania	Foreign Citizens
Legal Entities of the Republic of Lithuania	Foreign Legal Entities
Tax Arrears	
Non-payment	Deferred Overdue
Overdue Arrears	Deferred Arrears
Account Information	
* Account Name	Parent Account
Update Requested Date	Search Accounts...
Account Data Last Updated Date	

Cancel
Save & New
Save

Complete the Test

4. Save the Account.
5. Click **Update All Accounts**.
6. Confirm the flow by selecting **Yes**, then **Start**, then **Finish**.
7. Refresh the Account page.

The company data, available financial reports and preliminary RiskPlanner indicators should now be visible.



4. Notes for Administrators

- Grant access only to the users and profiles that require the application.
- Change editable Custom Metadata values only when your Salesforce object or field mappings differ from the package defaults.
- Data refreshes are manually initiated for transparency and control.
- The managed package retrieves data through HTTPS using a protected client/read credential. It does not send Salesforce passwords, session IDs or OAuth tokens.