CAMPFIRE POST INSTALLATION STEPS

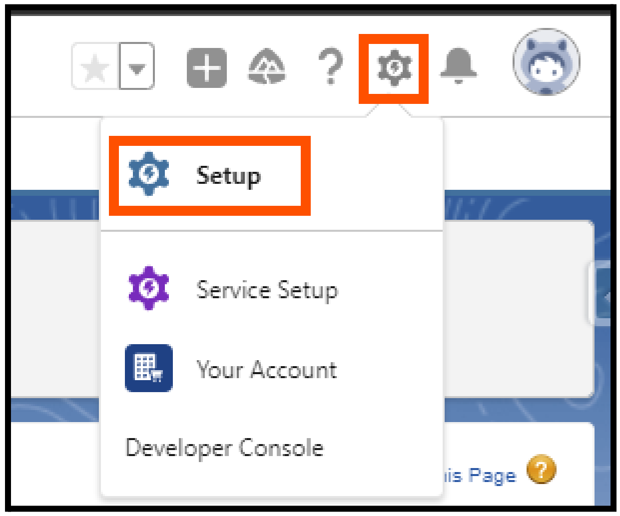
ASSIGN PERMISSION SET GROUPS

Assign the following **Permission Set Groups** to the corresponding users:

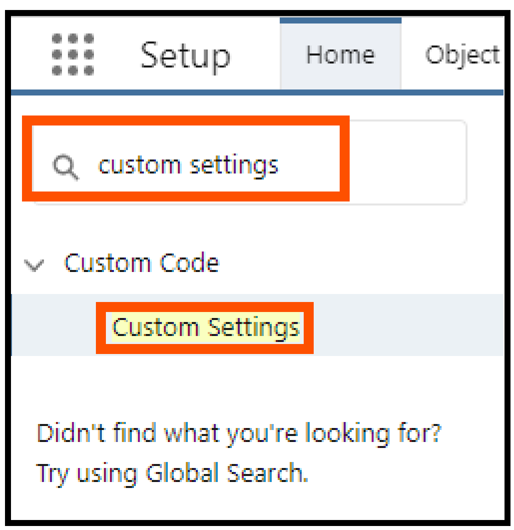
- **Campfire - Internal Admin**. For Admins that are going to be managing Campfire
- **Campfire - Internal Consultant.** For Consultants that are going to be creating various records on Campfire
- **Campfire - Internal Manager**. For Managers or PMs that are going to be creating or deleting various records on Campfire.
- **Campfire - Internal Tester**. For users that only have to run testing inside of Campfire.
- **Campfire - Read Only User.** For users that required read only access to all of the Campfire objects.
- **Campfire - Client Project Manager / Requirement Owner.** For Community Users that have the Salesforce's Community Plus license.
- **Campfire - Client Project Manager / Requirement Owner (Non Plus Users).** For Community Users that have the Salesforce's Community license.
- **Campfire - Client Tester.** For Community Users that have the Salesforce's Community Plus license or Salesforce's Community License and only have to run testing inside of Campfire.

ENABLE FLOWS AND VALIDATION RULES

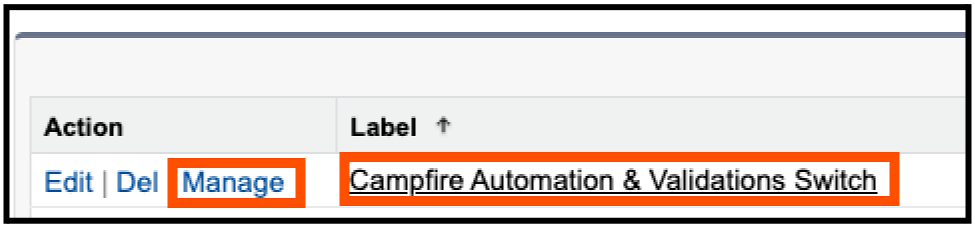
1. Click on the gear icon on the upper right side of the screen and click on **Setup**:



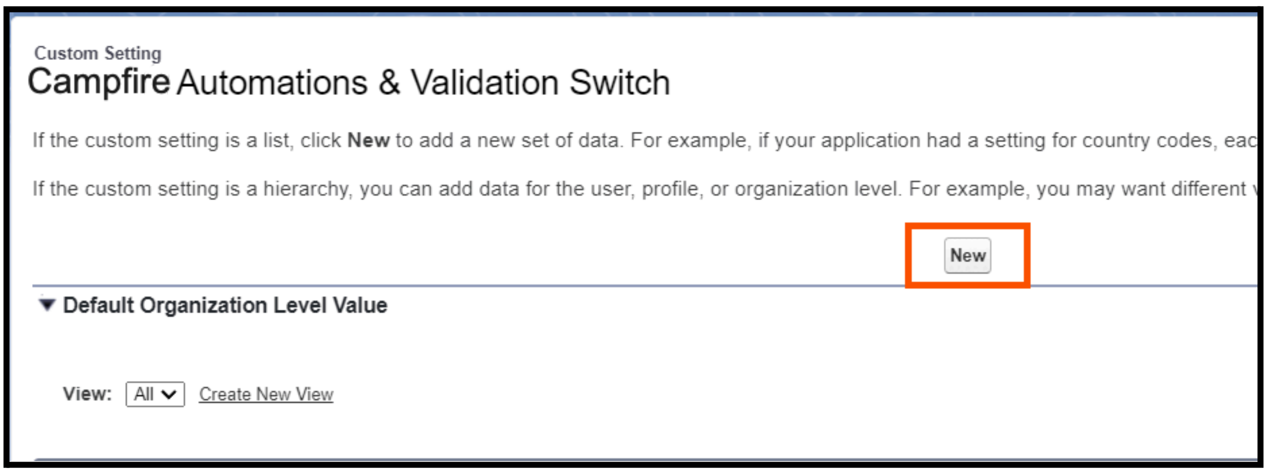
2. In the quick search bar on the left side of the screen, search for **Custom Settings** and click on it:

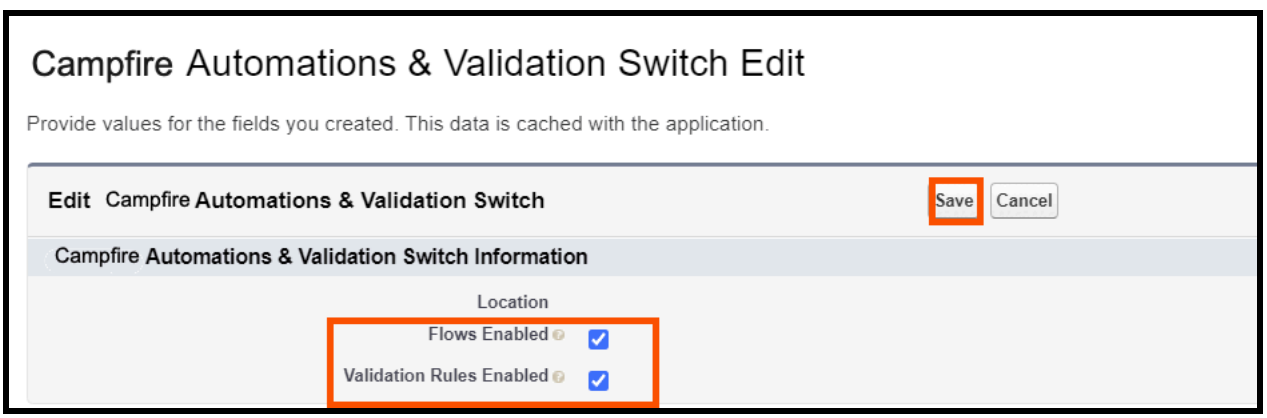


3. Search for **Campfire Automations & Validation Switch** and click on the **Manage** button:

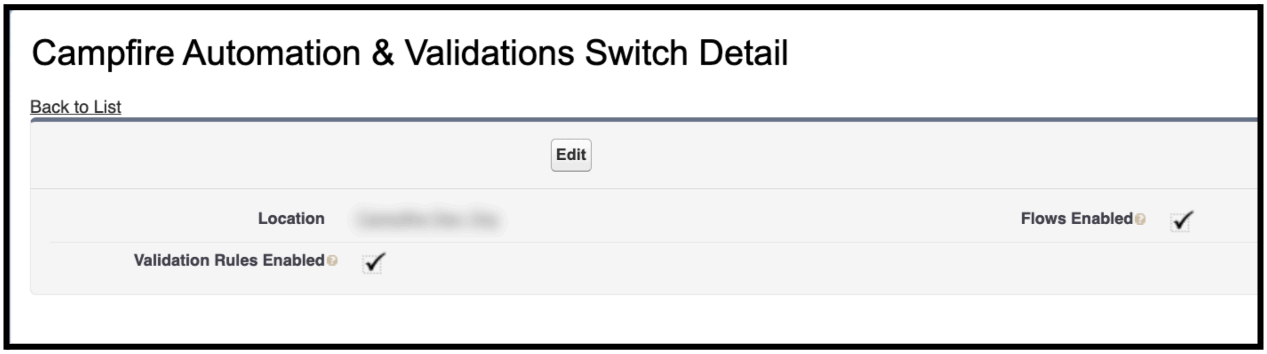


4. Click on **New** and make sure that the **Flows Enabled** and the **Validation Rules Enabled** are checked and click on the **Save button**:



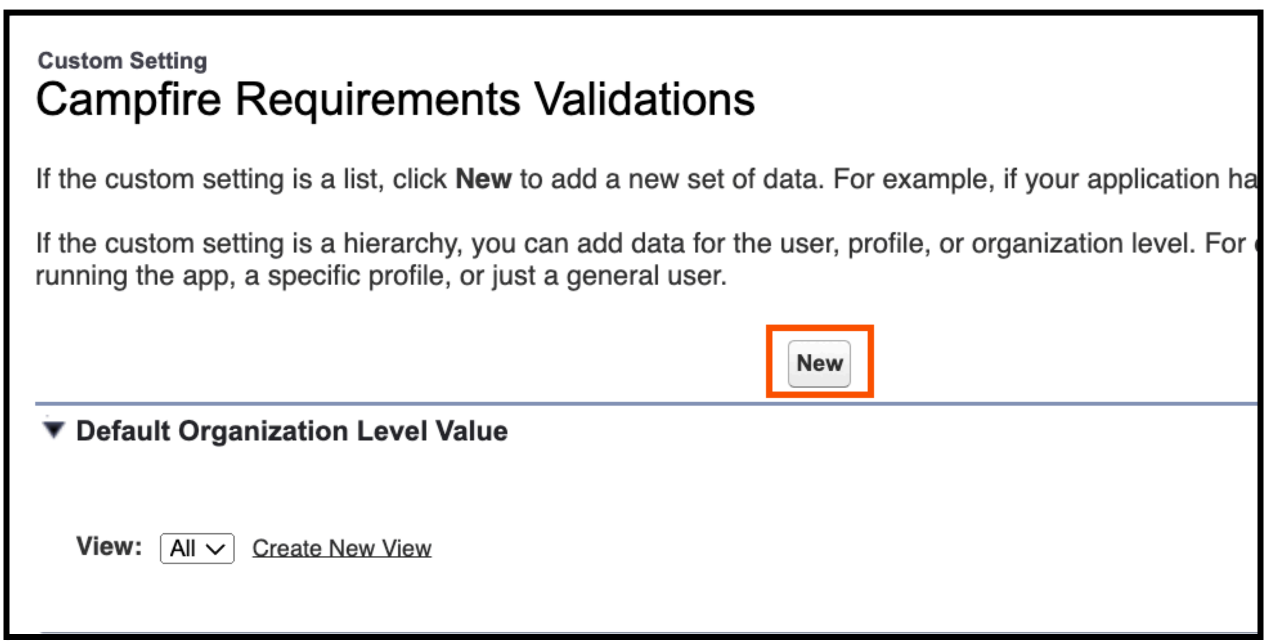


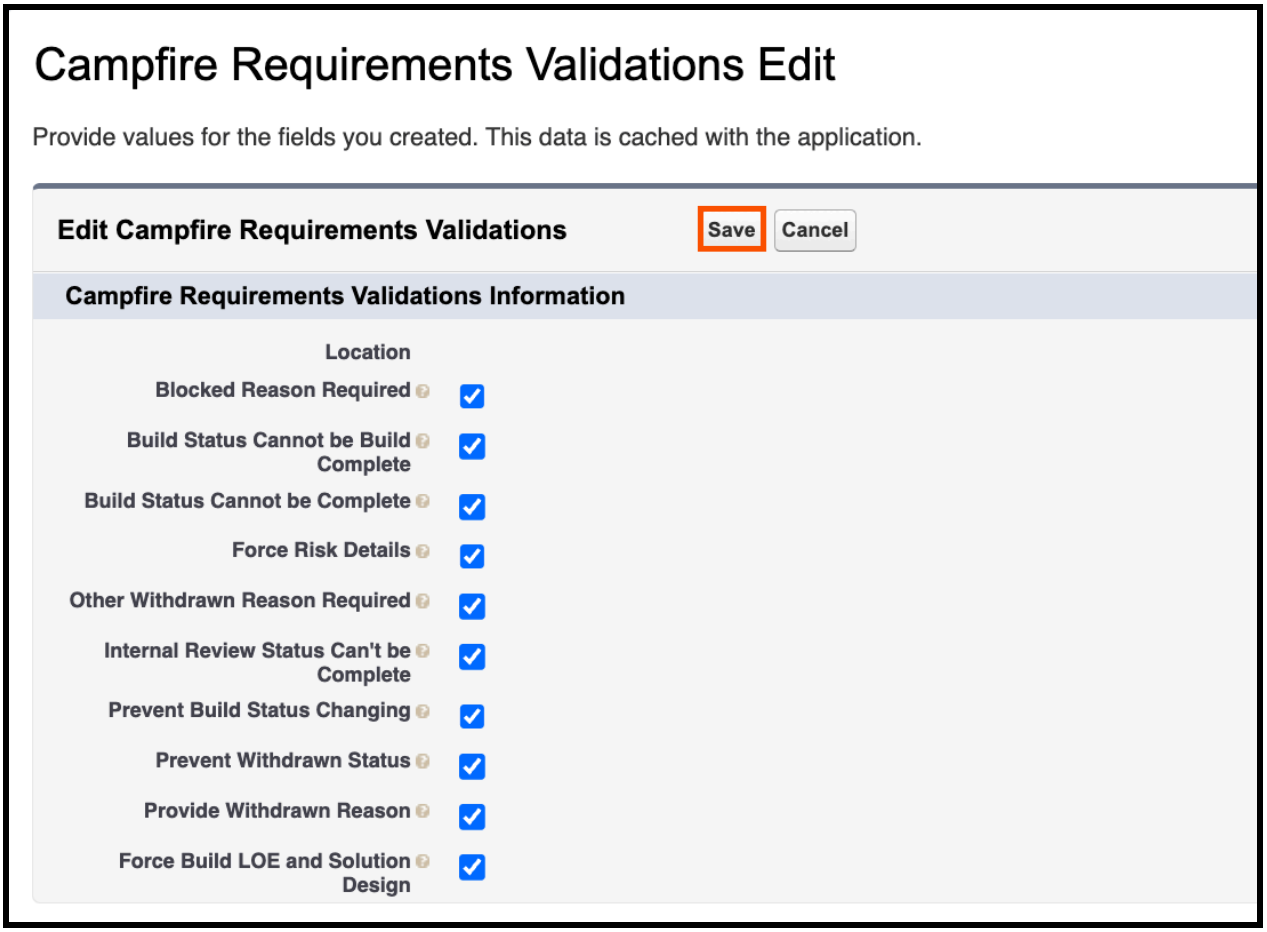
5. Once you see this screen, it's done.



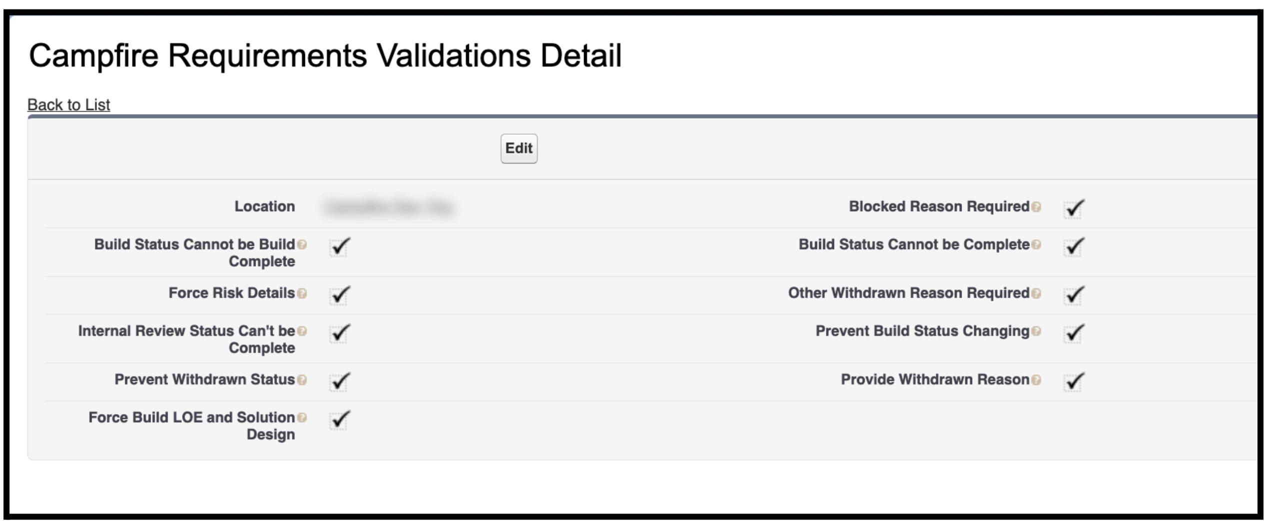
6. Navigate back to **Custom Settings** and click on the **Manage button** next to **Campfire Requirements Validations**:

7. Click **New** and then click **Save**:





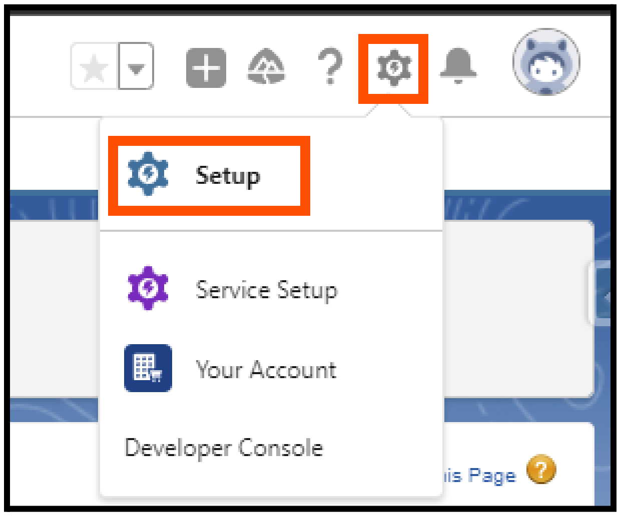
8. Once you see this screen, it's done:



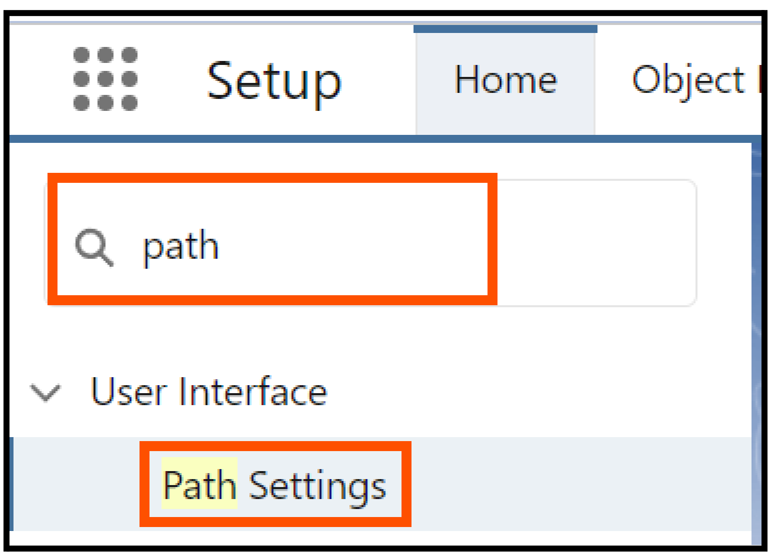
ENABLE THE REQUIREMENT PATH

NOTE: This step can be skipped if Paths are already enabled in your org

1. Click on the gear icon on the upper right side of the screen and click on **Setup**:



2. In the quick search bar, search for **Path Settings** and click on it:



3. Click on the **Enable** button and you are done!

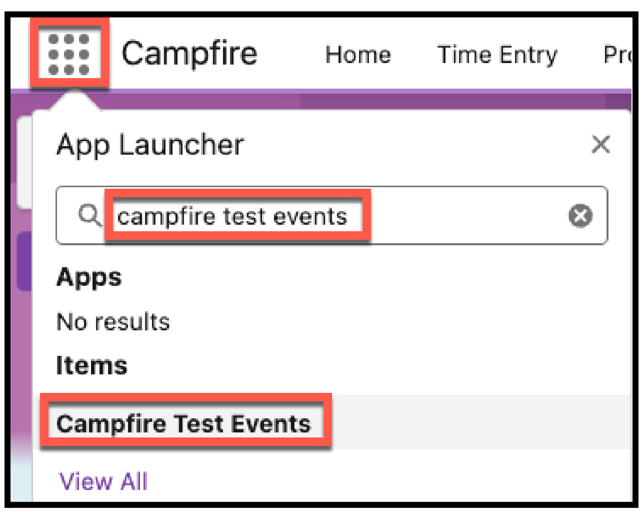
UPDATE PICKLIST VALUES

The values on the following picklists need to be updated:

1. Campfire Requirement:
    a. Product / Solution
2. Campfire Configuration Item:
    a. Type

CREATE TEST EVENTS RECORDS FOR YOUR ACCOUNTS

1. Click in the app launcher, search and click **Campfire Test Events**



2. Click the **New** button

3. Create a **Test Event** record with the following values:

    a. **Test Event Name:** QA Testing
    b. **Test Event Type**: QA Test
    c. **Active:** Checked
    d. **Account**: The Account record of your customer

4. Create a **Test Event** record with the following values:

    a. **Test Event Name**: Unit Testing
    b. **Test Event Type**: Unit Test
    c. **Active**: Checked
    d. **Account**: The Account record of your customer

5. Create a **Test Event** record with the following values:

    a. **Test Event Name**: Scenario Testing
    b. **Test Event Type**: Scenario Test
    c. **Active**: Checked
    d. **Account**: The Account record of your customer

6. Create a **Test Event** record with the following values:

    a. **Test Event Name**: SIT Testing
    b. **Test Event Type**: SIT Test
    c. **Active**: Checked
    d. **Account**: The Account record of your customer

7. Create a **Test Event** record with the following values:

    a. **Test Event Name**: End-to-End Testing
    b. **Test Event Type**: End-to-End Test
    c. **Active**: Checked
    d. **Account**: The Account record of your customer