

CAMPFIRE POST INSTALLATION STEPS

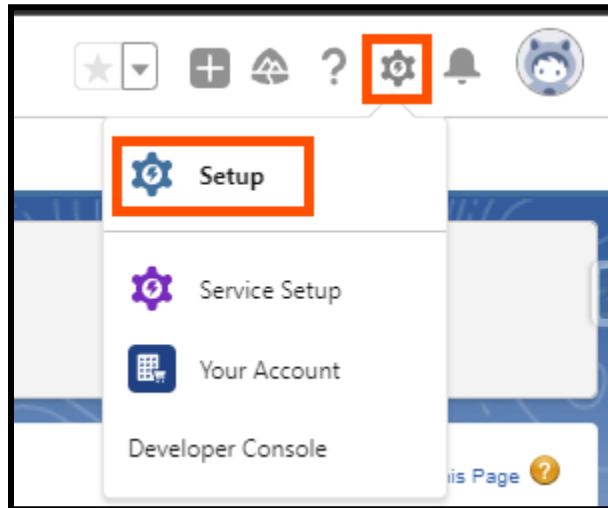
ASSIGN PERMISSION SET GROUPS

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

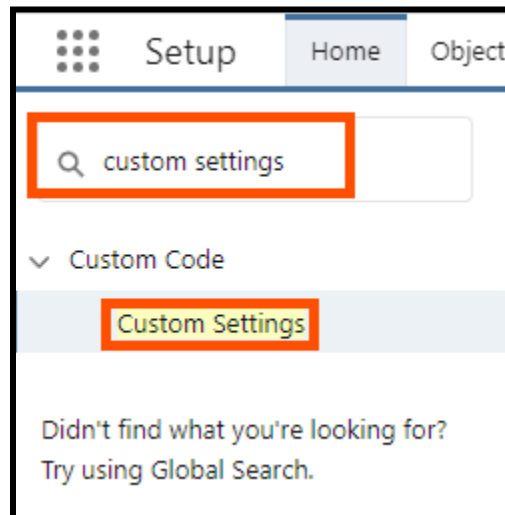
- **Campfire - Internal Admin.** For Admins that are going to be managing Campfire
- **Campfire - Internal Consultant.** For Consultants that are going to be creating various records on Campfire
- **Campfire - Internal Manager.** For Managers or PMs that are going to be creating or deleting various records 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:

Custom Setting

Campfire Automations & Validation Switch

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each country code would be a new set of data.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values for each user, profile, or organization level.

New

▼ Default Organization Level Value

View: All ▼ [Create New View](#)

Campfire Automations & Validation Switch Edit

Provide values for the fields you created. This data is cached with the application.

Edit Campfire Automations & Validation Switch **Save** Cancel

Campfire Automations & Validation Switch Information

Location

Flows Enabled ☒

Validation Rules Enabled ☒

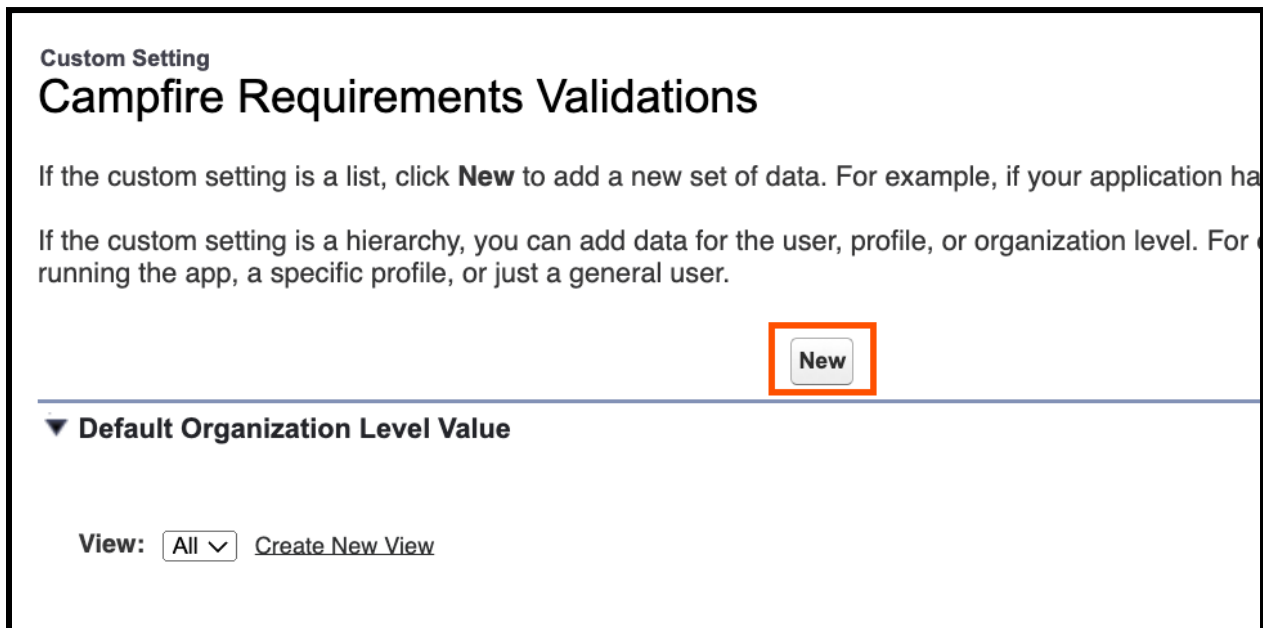
- Once you see this screen, it's done.



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



- Click **New** and then click **Save**:



Campfire Requirements Validations Edit

Provide values for the fields you created. This data is cached with the application.

Edit Campfire Requirements Validations

Campfire Requirements Validations Information

Location

Blocked Reason Required ⓘ	☒
Build Status Cannot be Build Complete ⓘ	☒
Build Status Cannot be Complete ⓘ	☒
Force Risk Details ⓘ	☒
Other Withdrawn Reason Required ⓘ	☒
Internal Review Status Can't be Complete ⓘ	☒
Prevent Build Status Changing ⓘ	☒
Prevent Withdrawn Status ⓘ	☒
Provide Withdrawn Reason ⓘ	☒
Force Build LOE and Solution Design ⓘ	☒

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

Campfire Requirements Validations Detail

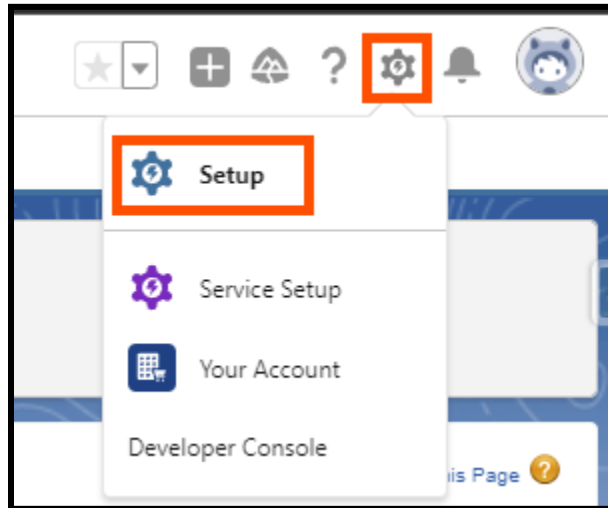
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Location		Blocked Reason Required ⓘ	☒
Build Status Cannot be Build Complete ⓘ	☒	Build Status Cannot be Complete ⓘ	☒
Force Risk Details ⓘ	☒	Other Withdrawn Reason Required ⓘ	☒
Internal Review Status Can't be Complete ⓘ	☒	Prevent Build Status Changing ⓘ	☒
Prevent Withdrawn Status ⓘ	☒	Provide Withdrawn Reason ⓘ	☒
Force Build LOE and Solution Design ⓘ	☒		

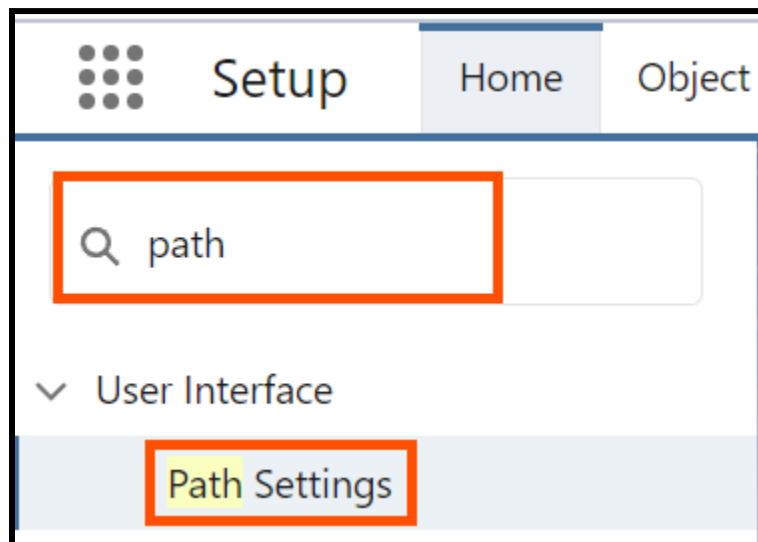
ENABLE THE REQUIREMENT PATH

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!

Path

Complete processes fast by keeping users focused on what's most important. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.

- Which fields and content appear for your users at each step in the process.
- What good advice, reminders, links, and best practices to include at each step.
- How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.
- When paths are available to your users.

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

[Enable](#)

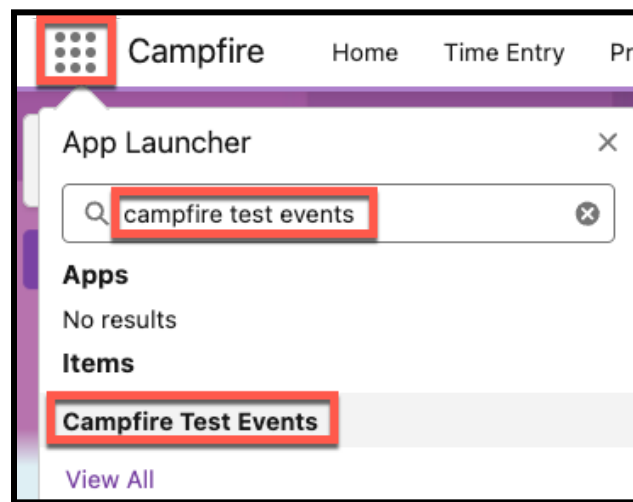
UPDATE PICKLIST VALUES

The values on the following picklists need to be updated:

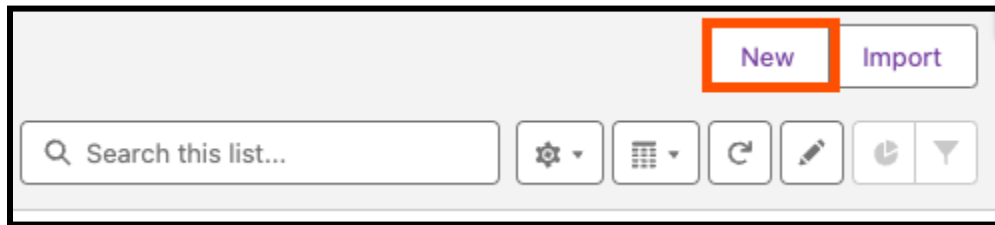
1. Campfire Requirement:
 - a. Product / Solution
2. Campfire Configuration Item:
 - a. Type

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