

Tohoom's Sales Intelligence Assistant Installation Guide

Introduction

This guide is to be used by the Salesforce administrator of your organization to install or upgrade the “Tohoom SIA” package into Salesforce Lightning. This package allows users to manage the sentiment, influence, and roles for opportunity contact roles through custom lightning web components on the opportunity and contact records and the Salesforce Email Pane.

Installing SIA Package for Salesforce

A Salesforce System Administrator is required to perform the installation and configuration. A Salesforce System Administrator will install the “Tohoom SIA” package from the Salesforce AppExchange. For direct access to the package, click this link: [LINK](#). To install into Production, click “Get it Now”. If the System Administrator is not logged into the Salesforce environment, they will be prompted to do so. Select the environment the package is to be installed in: Production or Sandbox. Confirming the installation details and accepting the Terms and Conditions is required before proceeding to the installation. Choose which users you would like to install the app for – click “Install”. Installation for “All Users” is recommended. User permissions can be handled with permission sets and record pages. The installation process will start – this process may take several minutes to complete. The installing System Administrator may be prompted to wait for an email if the installation takes too long. If that’s the case, the Administrator can close the tab and return to the Salesforce environment. Once the installation is complete, the System Administrator may resume the configuration steps.

Configuration of the SIA Package – Salesforce Permissions

The “Tohoom SIA” package is managed most easily through the use of permission sets. The following section details the permissions required for users to be able to use the “Tohoom SIA” package. The System Administrator will need to create your own permission set(s) and assign the required users to it in order to enable all required functionality. There are two fields you will need to provide users view and edit access to on the Opportunity Contact Role object to use the “Tohoom SIA” package. The Administrator can either add these two field permissions to an existing permission set or create a new permission set with these permissions. Follow these steps to provide the necessary field permissions:

- Open the existing or new Permission Set
- Go to “Permission Set Overview”
- Select “Object Settings”
- Click on “Opportunity Contact Role” Object
- Click “Edit”
- Under “Field Permissions” enable “Edit Access” for the two following fields: “Influence” (Tohoom__Influence__c) and “Sentiment” (Tohoom__Sentiment__c)
- Click Save

SETUP
Permission Sets

Permission Set
Tohoom SIA View/Edit

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments | View Summary

Permission Set Overview > Object Settings ▼ Opportunity Contact Role ▼

Opportunity Contact Role | Save | Cancel

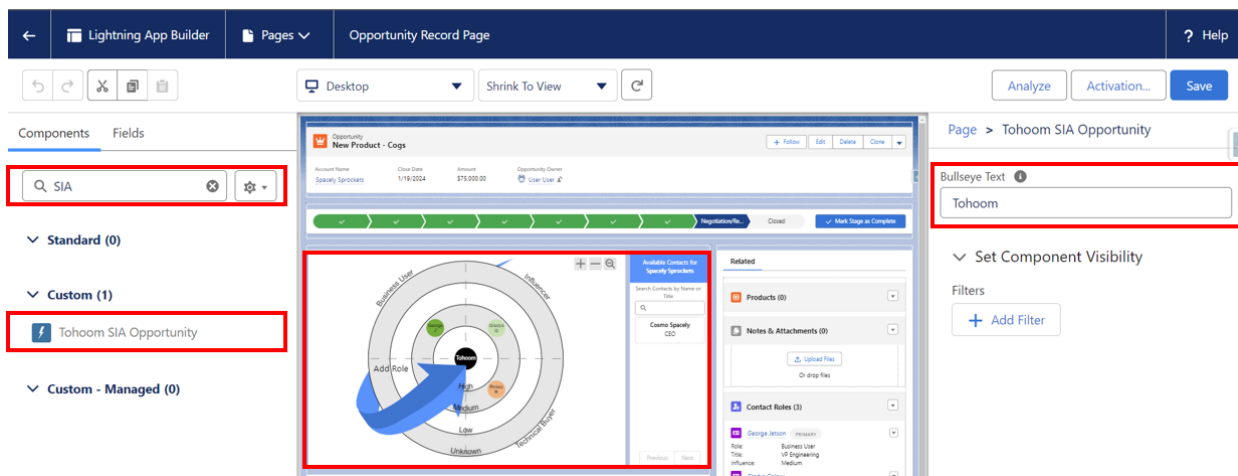
Field Permissions

Field Name	Field API Name	☐ Read Access	☐ Edit Access
Contact	ContactId	☒	☒
Created By	CreatedById	☒	☐
Influence	Tohoom__Influence__c	☒	☒
Last Modified By	LastModifiedById	☒	☐
Opportunity	OpportunityId	☒	☒
Primary	IsPrimary	☒	☒
Role	Role	☒	☒
Sentiment	Tohoom__Sentiment__c	☒	☒

On the new or existing Permission Set, click “Manage Assignments”. Click “Add Assignment”, the select which Salesforce users you want to have access to the “Tohoom SIA” features and click Next.

Configuration of the SIA Package – Opportunity and Contact Lightning Components

The Salesforce System Administrator will repeat this process on the Opportunity and Contact record pages to provide users access to the “Tohoom SIA” opportunity contact role target visualization. Navigate to any opportunity and/or contact record in Salesforce. Click “Setup” cogwheel in the upper right-hand side. Select “Edit Page”. In the “Components” section on the left, search for “SIA” and then click and drag the component to any location on the page. Tohoom recommends placing this component below the highlights panel near the top of the screen. Click on the “SIA” component and enter the name of your organization in the “Bullseye Text” text box in the section to the right. In the top right-hand corner click Activation and choose the activation options per your organization’s preferences. Finally click the save button and then click the “back Arrow” in the upper left to return to the Opportunity or Contact page to see the “Tohoom SIA” lightning component in the desired location.



Configuration of the SIA Package – Email Pane Lightning Components

This section assumes your organization has setup and is using the Salesforce email side pane in Outlook or Gmail. To provide users access to the “Tohoom SIA” email pane opportunity role target visualization while in Outlook or Gmail, navigate to “Outlook Integration and Sync” or “Gmail Integration and Sync” in Setup. Scroll down to the list of Email Application Panes and edit the relevant panes used in your organization. In the “Components” section on the left, search for “SIA” and then click and drag the component to any location on the page. Tohoom recommends placing this component near the top of the screen. Click on the “SIA” component and enter the name of your organization in the “Bullseye Text” text box in the section to the right. In the top right-hand corner click Activation and choose the activation options per your organization’s preferences. Finally click the save button.