GoElephant

Salesforce Value Intelligence

Installation Guide

October, 2026

The purpose of this document is to guide you through the steps to set up the **GoElephant**.

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Installation guide

Let's get started - installation is super quick.

1. Install GoElephant in your org

As a **Salesforce Admin** follow these steps to install **GoElephant** in your org:

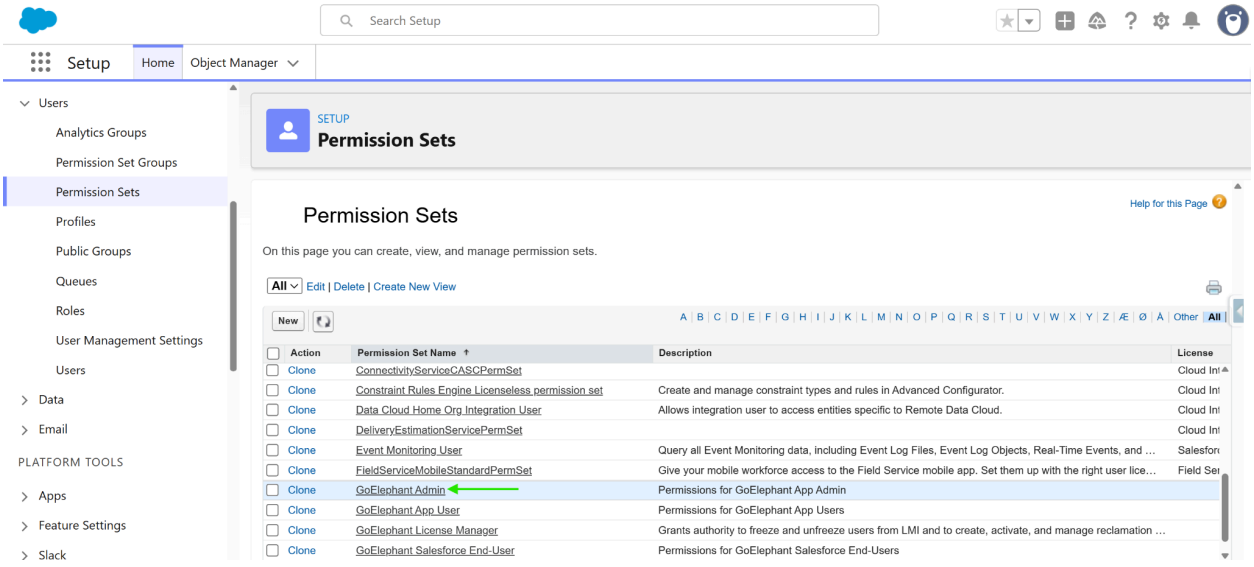
1. Install package directly from AppExchange listing
   a. Install for **Admins Only**
2. Receive email confirmation that the package has been installed

After completing step 1 and 2, you are ready to configure the **GoElephant** app for your org.

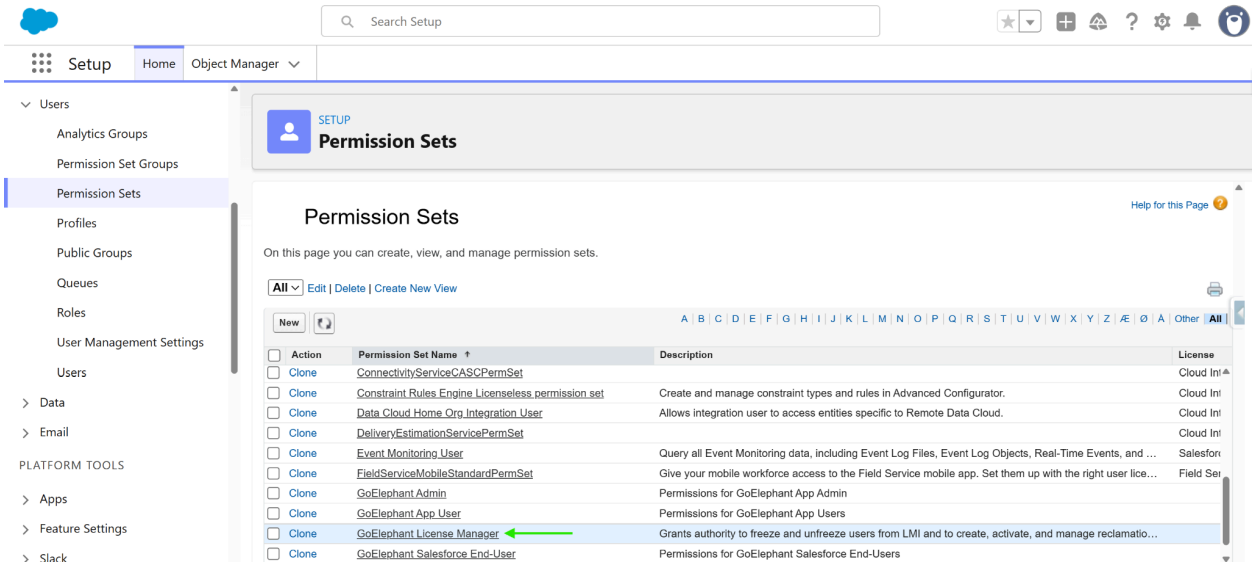
2. Configure GoElephant in your org

As a **Salesforce Admin** follow these steps to configure **GoElephant** for your org:

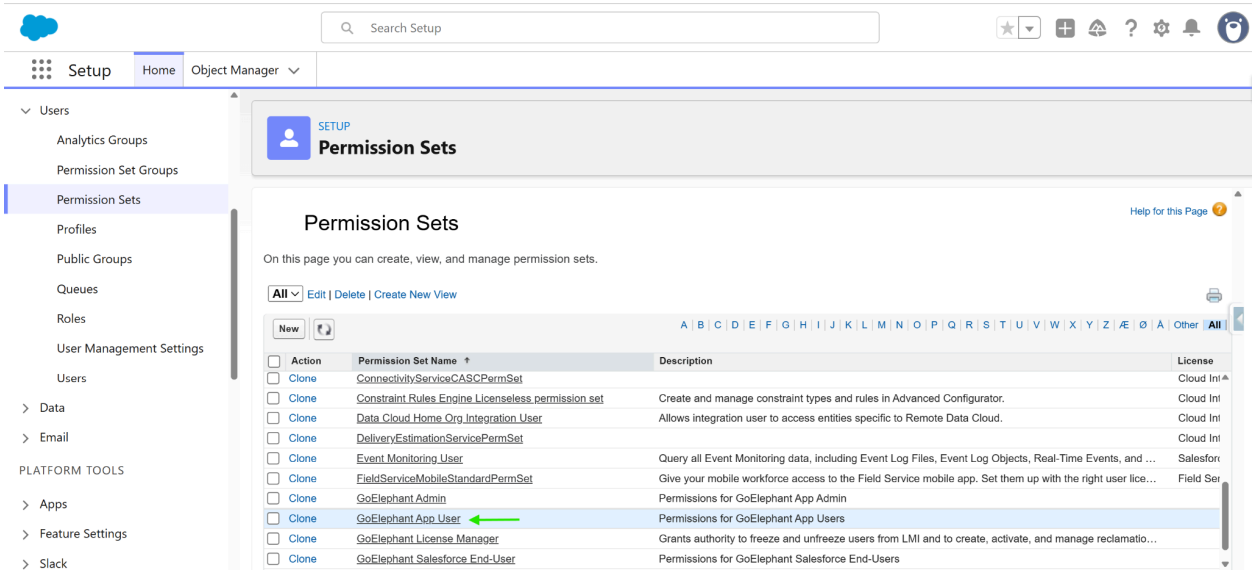
1. Assign the **GoElephant Admin** permission set to Salesforce Admin(s), only. This grants permission to configure the **GoElephant** app.



2. Assign the **GoElephant License Manager** permission set to "System Admin" level users who will manage License Reclamation Policies. Reclamation Policies identify underused Salesforce licenses and can freeze the associated user accounts to reclaim those licenses.
    - **Important note:** Because this permission set can freeze user accounts and includes broad user administration access, **assign it only to trusted System Admin level users**. It must be assigned **in addition to**, not instead of, the **GoElephant Admin and GoElephant App User** permission sets.



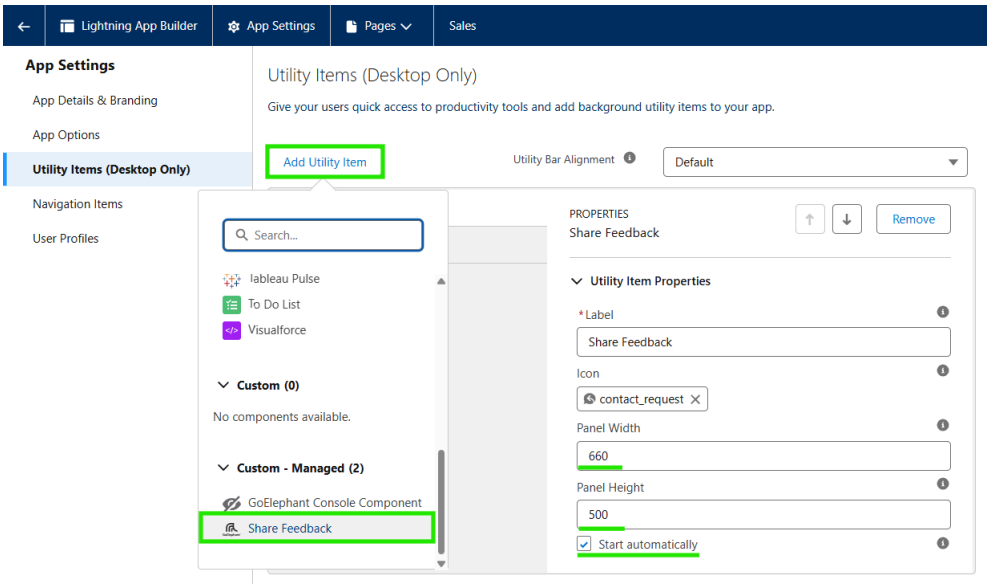
3. Assign the **GoElephant App User** permission set to people who need the **GoElephant** adoption insights; e.g. change and enablement managers, product owners, and program owners.



4. Add the **GoElephant utility component(s)** to the Salesforce apps your Salesforce End-Users use.

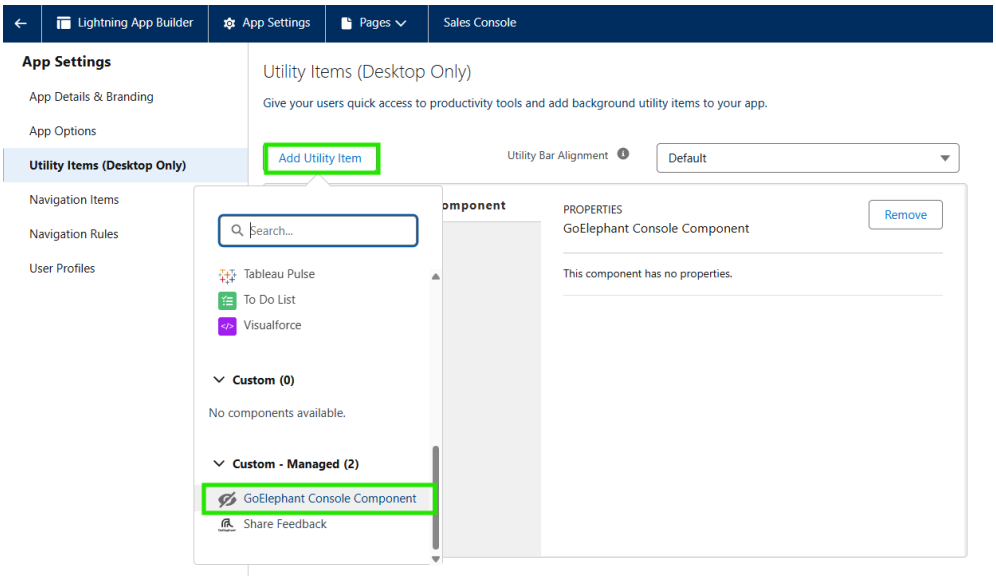
    Which component you add depends on the app's navigation type. You can see this in Setup > App Manager, in the **Navigation Style** column ("Standard navigation" or "Console navigation").

    - **Standard navigation apps** (for example Sales, Service, or a custom app)
        i. In Salesforce Setup, navigate to the **App Manager**.
        ii. Edit an app your **Salesforce End-Users** are using, for example "Sales".
        iii. Under **Utility Items**, add the **GoElephant "Share Feedback"** component
            1. Set **Panel Width: 660** and **Panel Height: 500**
            2. Click **Start automatically**
        iv. Click **Save.**



v. Repeat steps i.-iv. for <u>all Standard navigation apps</u> your **Salesforce End-Users** use.

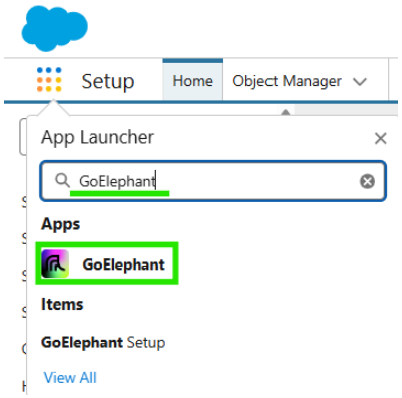
- **Console navigation apps** (for example Sales **Console**, Service **Console**)
  i. In Salesforce Setup, navigate to the **App Manager**.
  ii. Edit the console app your **Salesforce End-Users** are using
  iii. Under **Utility Items**, add the "**GoElephant Console Component**."
  iv. Click **Save.**



v. Repeat steps i.-iv. for <u>all Console navigation apps</u> your **Salesforce End-Users** use.

The **GoElephant Console Component** runs in the background. It has no visible panel and no width, height, or start-automatically settings, so there is nothing to configure after you add it.

5. Using the App Launcher, navigate to the **GoElephant** app:



6. Go to the "**GoElephant Setup**" tab
    - On the "**GoElephant Setup**" sub-tab:
    - Select data retention policy
    - Select your policy for **GoElephant Salesforce End-User** Permission Set assignment.

      If you later change the policy for Permission Set assignment from "Assign to all active internal users" to "Manually assign", users with the permission set currently assigned will continue to have it assigned unless you manually remove them.

    - Select Team Rollup Method - how to compare adoption across your organization
        i. By Role Hierarchy
        ii. By a custom field on the User object (E.g. Market, Sales Org, Business Unit or Team)
        iii. By the Manager field on the User object
        iv. By Custom Org Structure: combine up to three User fields into a team hierarchy, for example Region, then Country, then Function. Use this when no single field or hierarchy describes how your organization is really organized.

    - Add objects to track to count towards your **GoElephant** Usage Score
        i. You can select any standard or custom object

    - Define expected activity level for your users - by
        i. Setting the same expected activity level for all users
        ii. Setting different expected activity levels by Role
        iii. Setting different expected activity levels by a picklist field on the user object (e.g. Function)
        iv. Each user group then gets its own row with three settings:

Setting	**What it does**
Target Period	Whether this group's expected activity is measured per Week or per Month.
Expected Logins (0-5)	How often you expect these users to log in, in the selected period.
Expected Usage (0-5)	How often you expect these users to create or update records on your tracked objects, in the selected period.

      Set **Expected Logins** or **Expected Usage** to **0** when that activity should not be scored for that user group.

    - (Optional) Input user license pricing to be able to calculate license reclamation potential.
    - Click: "**Confirm**"

<u>This completes the installation and configuration steps. Well done. **GoElephant** is now collecting adoption data.</u>

GoElephant will begin to generate insights - so you can drive 10x more targeted and impactful enablement activities.

Set up My GoElephant Settings (optional)

If you are on GoElephant's **Premium** or **Enterprise** plan, **GoElephant Admins** and **App Users** have the ability to set up their own personal "**My GoElephant Settings**":

My GoElephant Settings is a **personal settings** page. It is a sub-tab of the GoElephant Setup tab, next to the organization configuration you completed above.

Who can see it: anyone with the **GoElephant Admin** or **GoElephant App User** permission set.
Plan: **Premium** and **Enterprise**.
What it changes: only what that person sees or receives. It never changes scores, survey delivery, license reclamation, or anything another app users sees.

There are **3 settings** app users can personalize:

1. **My User Groups**
    - A GoElephant user responsible for part of the organization can set this once instead of re-filtering on every visit. This section only appears when you have configured Expected Activity by a custom picklist field on the User object (step f. iii. above); it uses those same values.
2. **My Processes**
    - Each GoElephant user can choose which processes they want to see. A Sales leader may not want to see processes related to Cases, for example.
3. **My Email Notifications**
    - Three email notifications can be turned off individually:
    - Survey responses that need attention - sent when a user gives a low rating or leaves written feedback
    - Weekly feedback summary - sent weekly, when there are responses in the period
    - Monthly Executive Adoption Summary - sent on the first day of the month
    - All three are enabled by default. Turning one off affects only that person's own email preferences.

Questions?

If you have questions, issues or ideas, please contact:

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