

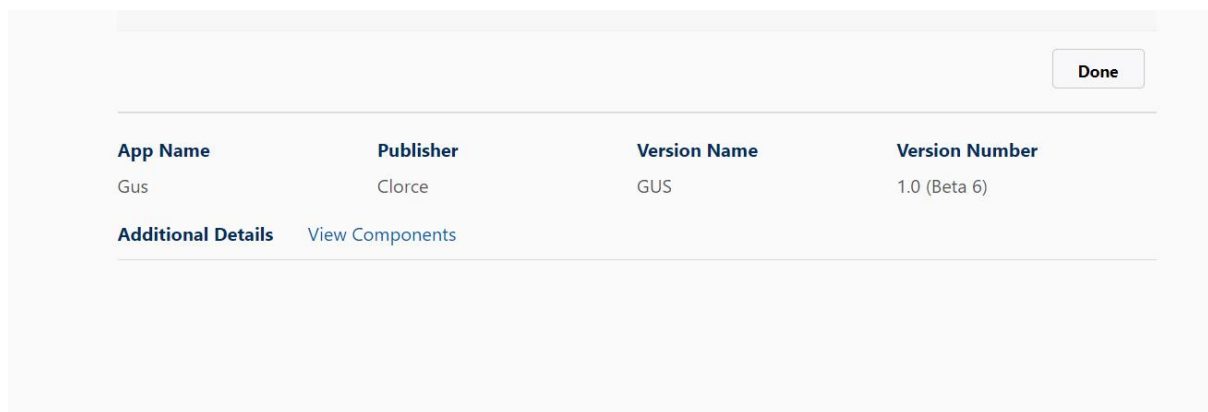
GUS Connector Installation Manual



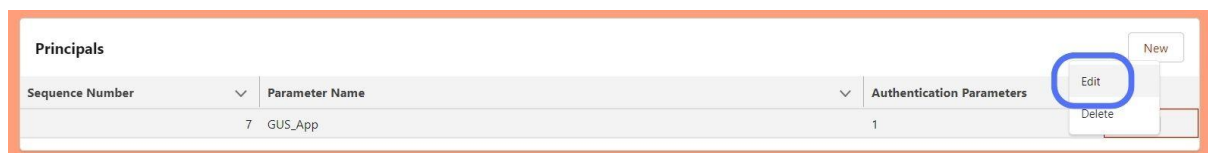
2023

The GUS Connector application is used to retrieve information about companies from the GUS database based on NIP or REGON numbers and create Lead and Account records in the Salesforce system. GUS Connector also enables single and bulk updates of these records based on the GUS database. The following instructions are prepared for someone installing the application and having extensive administrative privileges (we suggest having a System Administrator profile).

Plugin Installation

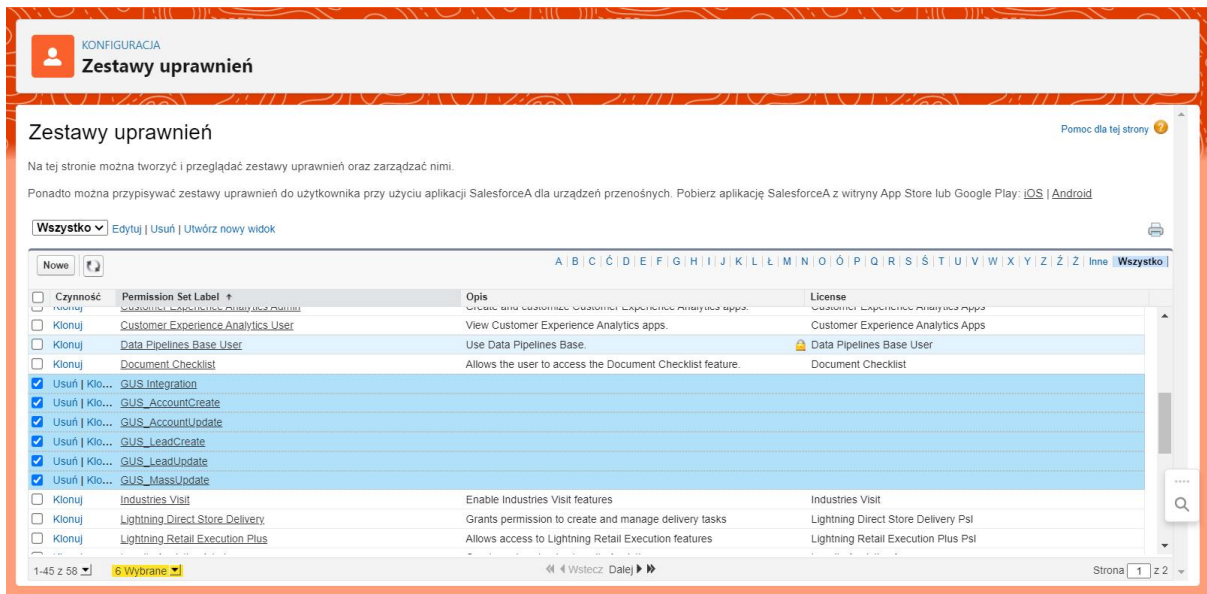


1. Install the package.
2. In Setup, choose: Configuration → Named Credentials → External Credentials → Select Edit next to Principals → GUS_App and enter values:
 - for Name - AuthToken,
 - for Value - the password you received from Clorce.



3. In settings, select Users. In the Permission Sets section of User settings, assign appropriate permissions from the list:
 - GUS_AccountCreate (pertains to permissions for creating Account records based on GUS data fetched by the GUS Plugin Back Office),
 - GUS_AccountUpdate (pertains to permissions for updating individual records with GUS data using the GUS Plugin Back Office),

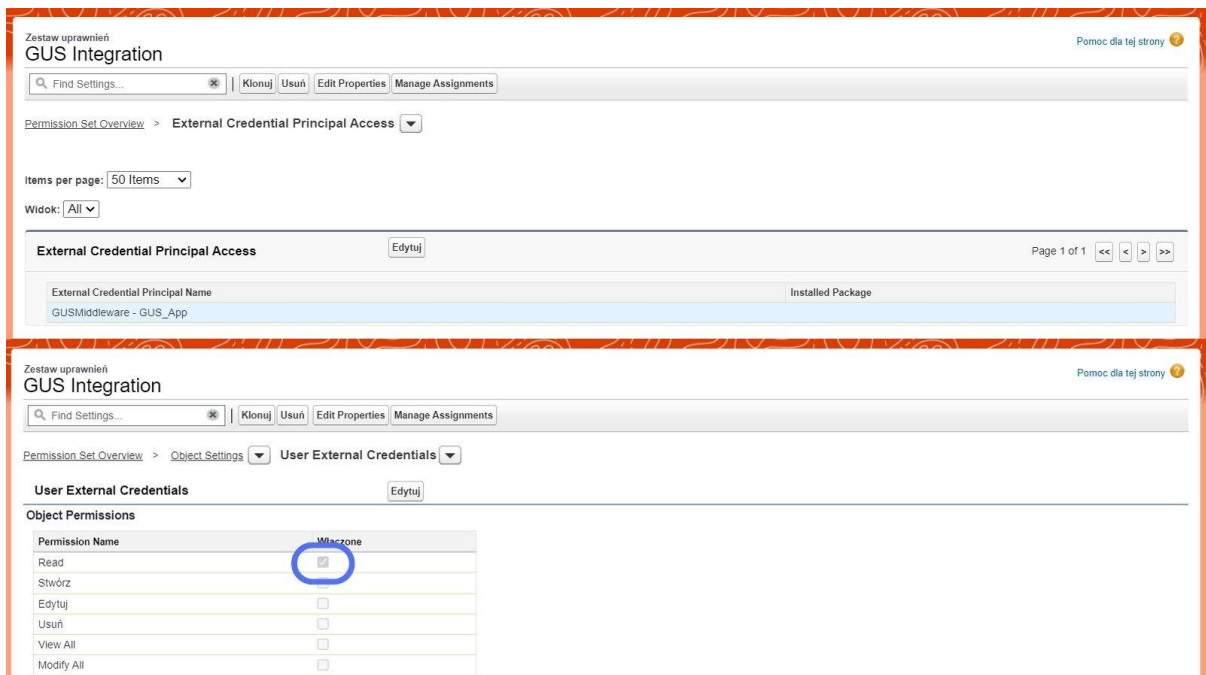
- GUS_LeadCreate (pertains to permissions for creating Lead records based on GUS data fetched by the GUS Plugin Back Office),
- GUS_LeadUpdate (pertains to permissions for updating individual records with GUS data using the GUS Plugin Back Office),
- GUS_MassUpdate (pertains to permissions for mass updating records of both objects).



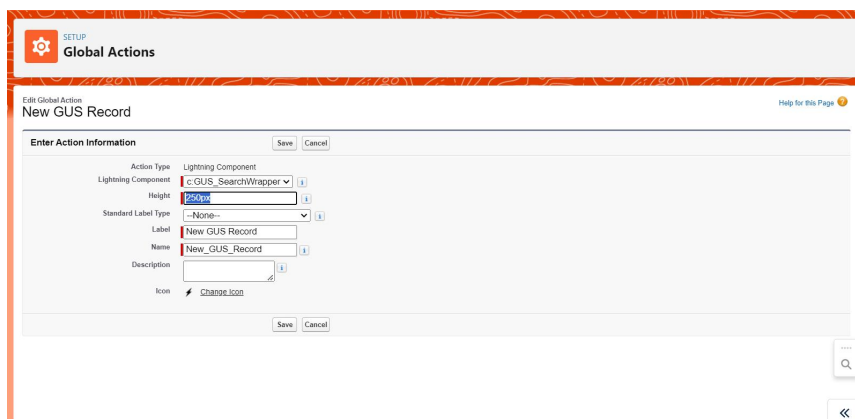
VERY IMPORTANT:

Without Organization Wide Defaults (OWD) permissions, users might still not have the ability to create records. For the selected object, it is necessary to grant the Create option within OWD or using a Sharing rule. Additionally, access to creating selected Record types must be granted for specific users. This can be done through Profiles or Permission Sets. Record types might differ between environments, so they need to be addressed independently of GUS Connector application permissions.

4. You need to create a new Permission Set, and in it:
 - add GUSMiddleware - GUS_App in External Credential Principal Access,
 - in Object Settings → User External Credentials, select Read.
 Assign this Permission Set to all users who are to use the application.

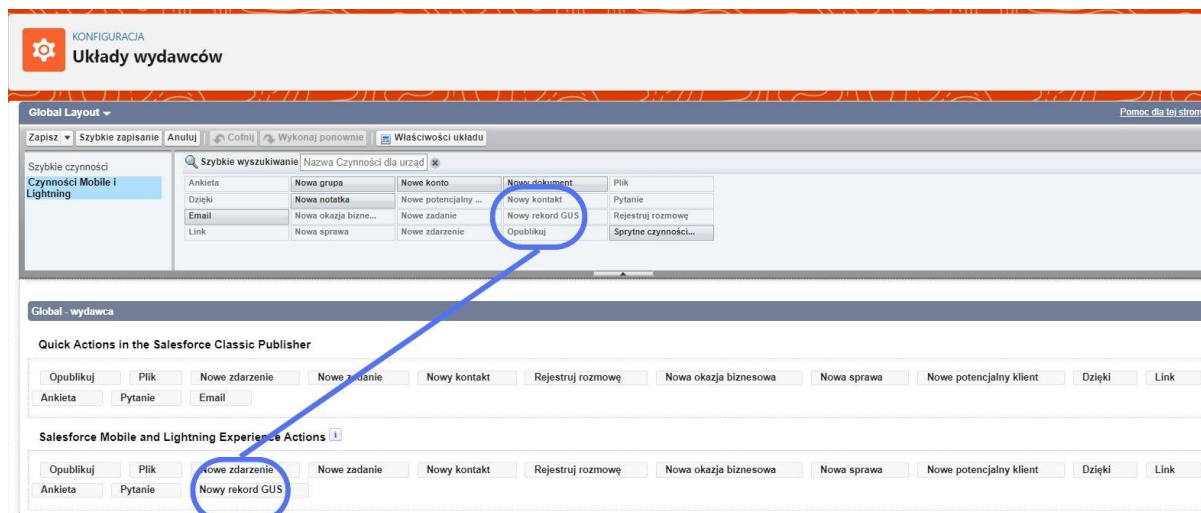


5. The search component can be made available to users in various places and elements of the system according to their needs:
 - As a Global Action - the component will be visible to all users, not available in the mobile app, operating based on granted permissions.
 - As a Utility Item - the component will be visible to all users with access to the configured application, not available in the mobile app, operates based on granted permissions. More information on this: help.salesforce.com,
 - As a Home Page component - visibility of the component can be controlled for different users via Lightning Page (using Component Visibility), not available in the mobile app. Home Page configuration and assignment is a standard Salesforce functionality, and more information can be found here: help.salesforce.com.
6. To add the GUS search to Global Actions, choose Setup → Global Actions and create a new Action (Action Type: Lightning Component, Lightning Component: GusSearchWrapper, you can provide your own Label, e.g. New GUS Record).



Next, choose Setup → Global Actions → Publisher Layouts.

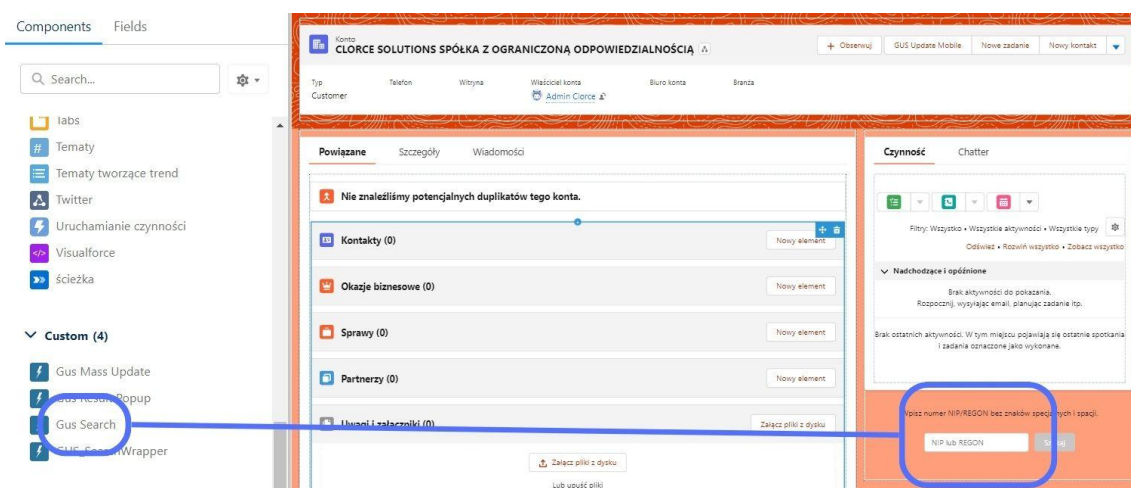
In Global Publisher Layouts, add the GUS search to Salesforce Mobile and Lightning Experience Actions.



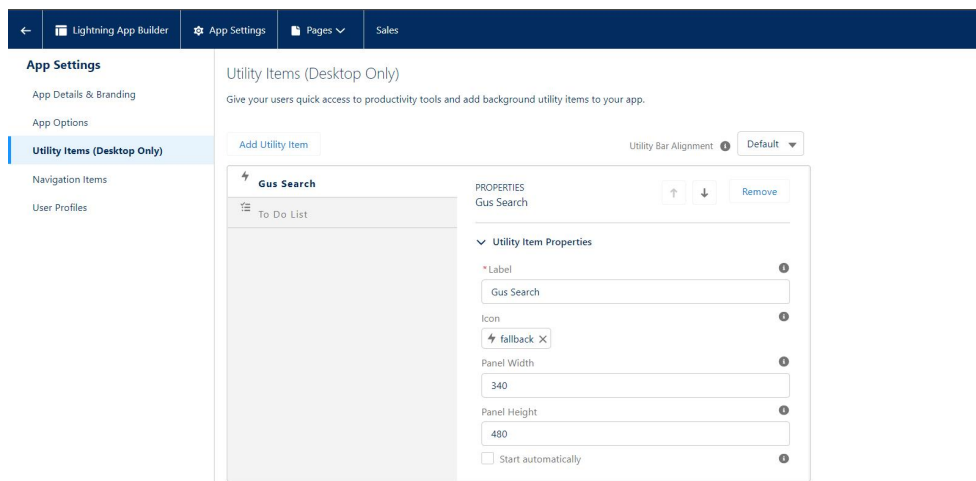
- To add the GUS search component to the Home Page, open the Home Page, expand the Configuration menu (Setup), and select Edit Page.

In the Components menu on the left side of the screen, in the Custom section, choose the Gus Search element and drag it using the left mouse button to the middle of the screen, where the elements added to the page layout are located. The areas where you can add the component will be highlighted in green. Drop the component in the chosen place.

Next, select Save in the top-right part of the screen. If the Activate button is not grayed out, activate the page and select the Back button (left arrow in the top-left corner of the screen). Refresh the Home Page. The component should be visible in the chosen location on the page layout.



8. To add the GUS search component to Utility Items, select Setup → Apps → App Manager. Find the application to which you want to add the component and choose the Edit option. In the Utility items tab, select the Add Utility Item button. From the Custom section, choose GUS Search. Select the Save button.



9. The plugin installs a set of custom fields for storing GUS data. To display fetched or updated data, add these fields to Potential Lead and Account Page Layouts, respectively:

- Setup → Lead → Page Layouts
- Setup → Account → Page Layouts.

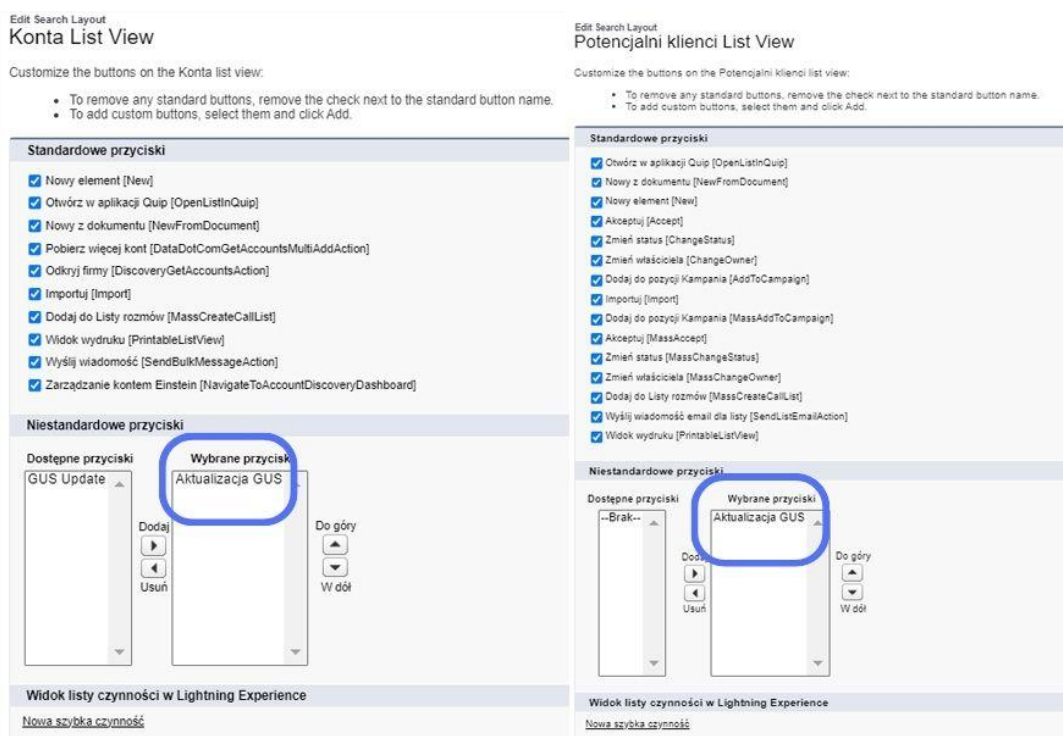
All fields added by the application have values in the Field Name (see Fields & Relationships) with a prefix GUS (e.g. GUS_NIP_c).

Fields available for Lead based on Labels are: NIP, REGON, NIP Status, Silo Description, Silo ID.

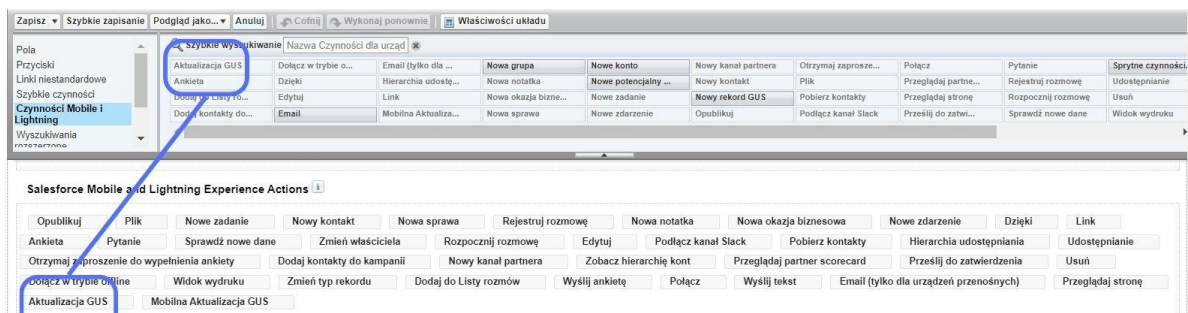
Fields available for Account based on Labels are: NIP, REGON, NIP Status, Silo Description, Silo ID.

Note: If Dynamic Forms are enabled on the object, these fields need to be added through the Lightning Page Layout. Otherwise, even after adding them to the Detail Page, they won't be visible to users.

10. To add the Mass Update button to the Lead list view, select Setup → Lead → List View Button Layout. Choose Edit for List View (down arrow on the right side of the screen). In the Custom Buttons section, move the Update GUS button from available to selected buttons.
11. To add the Mass Update button to the Account list view, select Setup → Account → List View Button Layout. Choose Edit for List View (down arrow on the right side of the screen). In the Custom Buttons section, move the Update GUS button from available to selected buttons.



12. To add the single record update button for Lead, select Setup → Lead → Page Layouts. In the chosen Page Layout, add the Update GUS button (Mobile and Lightning actions) to the Salesforce Mobile and Lightning Experience Actions section.



13. To add the single record update button for Account, select Setup → Account → Page Layouts. In the chosen Page Layout, add the Update GUS button (Mobile and Lightning actions) to the Salesforce Mobile and Lightning Experience Actions section.

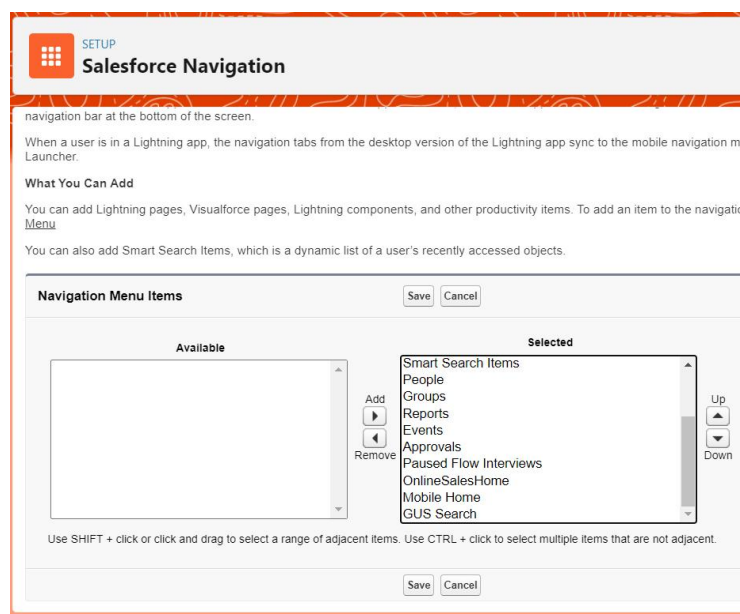
14. Along with the plugin, three types of Reports are installed in the GUS Connector Reports folder:

- GUS - Leads by Activity Type - organizing Potential Customer (Lead) records by BIR business activity type with columns representing updated fields,
- GUS - Accounts by Activity type - organizing Account records by BIR business activity type with columns representing updated fields,
- GUS - Accounts by State - organizing Account records by NIP status with columns representing updated fields.

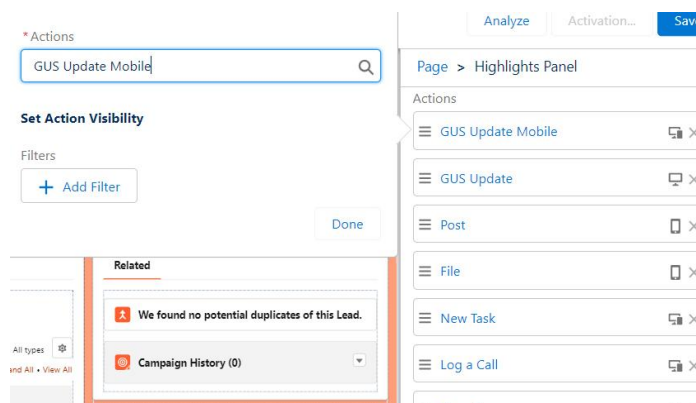
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GUS - Accounts by Activity type	Accounts grouped by the type of Activity imported from GUS	GUS Connector Reports	Admin Clorce
GUS - Accounts by State	Accounts grouped by the State imported from GUS	GUS Connector Reports	Admin Clorce
GUS - Leads by Activity Type	Leads grouped by the type of Activity imported from GUS	GUS Connector Reports	Admin Clorce

15. Configure the mobile version of the app:

- You need to add GUS Search in Salesforce Navigation,



- And the GUS Update Mobile button in Dynamic Actions, in the Lightning App Builder for Leads and Accounts records.



For technical questions and concerns, please contact us via email at gus@clorce.com, and for sales inquiries (including query quantities), contact sales@clorce.com