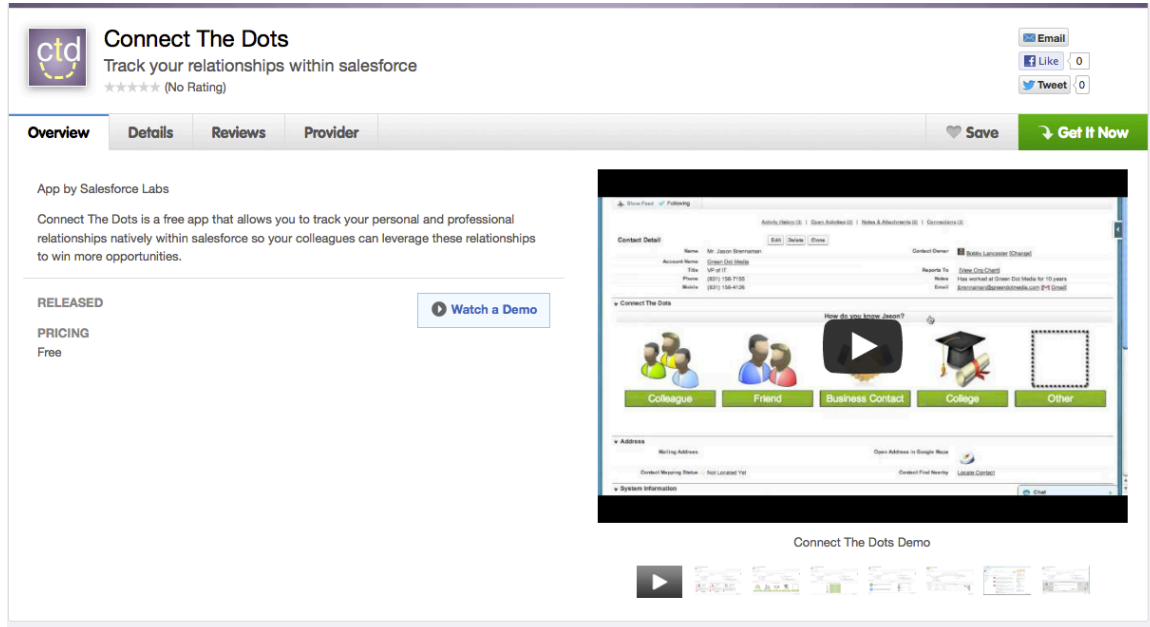


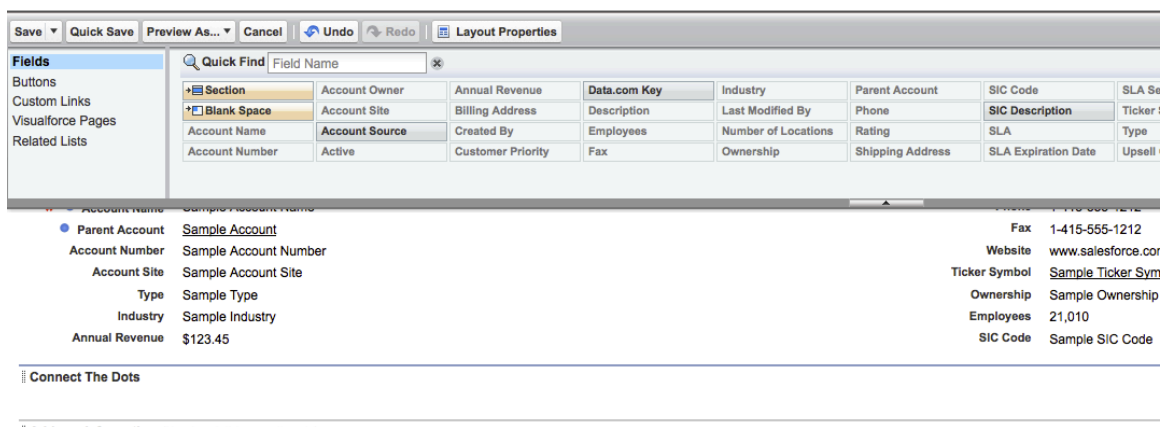
Connect The Dots

Installation Instructions

1. Install the Connect The Dots package by clicking on Get It Now from the AppExchange listing:



2. Add a new section to the **Account** page layout called Connect The Dots and make sure the section has 1 column



3. Add the Visualforce page **CTD_Account_Page** to the Connect The Dots section

The screenshot shows the Salesforce Visualforce page editor interface. The top toolbar includes buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left sidebar, the 'Visualforce Pages' tab is selected. The main workspace is divided into a 'Quick Find' search bar and a list of components. The components list includes 'Section', 'Blank Space', and 'CTD_AccountPage'. Below the components list, a preview of the page layout is shown. It features a table with account information and a section titled 'Connect The Dots' which contains a single component labeled 'VF CTD_AccountPage'.

Account Site	Sample Account Site	Ticker Symbol	Sample Ticker Symbol
Type	Sample Type	Ownership	Sample Ownership
Industry	Sample Industry	Employees	21,010
Annual Revenue	\$123.45	SIC Code	Sample SIC Code

Connect The Dots

VF CTD_AccountPage

4. Add a new section to the **Contact** page layout called Connect The Dots and make sure the section has 1 column

The screenshot shows the Salesforce Visualforce page editor interface for a Contact page. The top toolbar is the same as in the previous screenshot. The left sidebar shows the 'Fields' tab selected. The main workspace displays a list of fields for a Contact record, including 'Asst. Phone', 'Data.com Key', 'Email', 'Home Phone', 'Last Stay-in-Touc...', and 'Mobile'. Below the fields list, a preview of the page layout is shown. It features a table with contact information and a section titled 'Connect The Dots' which contains a single component labeled 'VF CTD_AccountPage'.

Account Name	Sample Account	Mobile	1-415-555-1212
Title	Sample Title	Other Phone	1-415-555-1212
Department	Sample Department	Fax	1-415-555-1212
Birthdate	3/1/2013	Email	sarah.sample@company.com
Reports To	Sample Contact	Assistant	Sample Assistant
Lead Source	Sample Lead Source	Asst. Phone	1-415-555-1212

Connect The Dots

VF CTD_AccountPage

5. Add the Visualforce page **CTD_Contact_Page** to the Connect The Dots section

The screenshot shows the Salesforce Visualforce page editor interface. At the top, there is a toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar, on the left, is a sidebar with 'Fields', 'Buttons', 'Visualforce Pages', and 'Related Lists'. The 'Visualforce Pages' section is selected, and a 'Quick Find' box shows 'Page Name' with a search icon. Below the search box, a list of components is shown: 'Section', 'Blank Space', and 'CTD_ContactPage'. The 'CTD_ContactPage' component is highlighted. The main area of the editor shows a sample record for a contact with fields like 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Fax', 'Email', 'Assistant', and 'Asst. Phone'. Below the sample record, there is a section titled 'Connect The Dots' which contains a large blue rectangular area representing the Visualforce page. In the center of this area, there is a small icon and the text 'CTD_ContactPage', indicating that this component has been added to the page.

6. Create a new Remote Site with the URL of the salesforce instance that you are on. To find this, look at the start of the URL after logging into salesforce eg (na1.salesforce.com, na2.salesforce.com).
- To create the Remote Site go to **Your Name > Setup > Security Controls > Remote Site Settings**
 - Enter the Remote Site Name "CTD" and paste the above URL into the Remote Site URL field.

The screenshot shows the 'Remote Site Edit' form in Salesforce. At the top, there is a title bar with the text 'Remote Site Edit' and three buttons: 'Save', 'Save & New', and 'Cancel'. Below the title bar, the form contains several fields: 'Remote Site Name' with the value 'ConnectTheDots', 'Remote Site URL' with the value 'https://na15.salesforce.com', 'Disable Protocol Security' with a checkbox that is unchecked, and 'Description' with a large text area. At the bottom, there is an 'Active' checkbox that is checked. The form also has 'Save', 'Save & New', and 'Cancel' buttons at the bottom right.

7. Ensure that any users that are going to use the Connect The Dots application have full Create, Read, Edit and Delete rights to the Connections Object. Go to Manage Users > Profiles, select the user profile that will be using the app

Connections

[Edit](#)

Tab Settings

Default On

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Connection Layout

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☐
Modify All	☐

Field Permissions