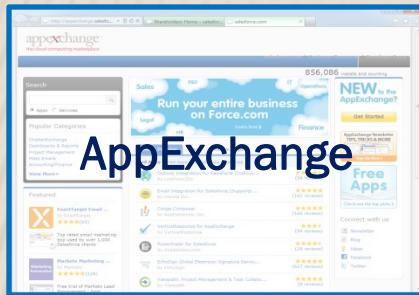
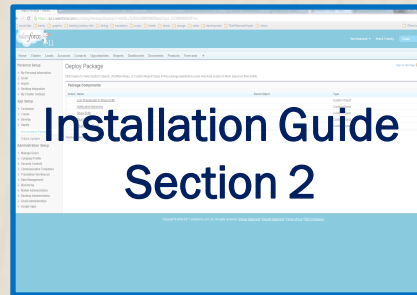


MANAGE SHAREHOLDER COMMUNICATIONS ONLINE

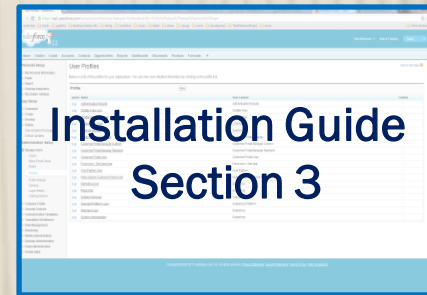


Get license from AppExchange

<http://appexchange.salesforce.com/home>



Install ArticuShare Package



Setup ArticuShare User Access

ArticuShare v1.1

INSTALLATION GUIDE

May 15, 2011

CONTENT

- × Overview
- × Install ArticuShare Package
- × Setup User Access

OVERVIEW

✕ Steps for installing ArticuShare

- + Acquire ArticuShare License – obtain an ArticuShare license from the AppExchange and follow the instructions to start the installation process.

<http://appexchange.salesforce.com/home>

- + Install ArticuShare Package – see the step-by-step instructions in the next section of this Installation Guide.
- + Setup ArticuShare User Access – see the step-by-step instructions in the last section of this Installation Guide.

CONTENT

- ✕ Overview
- ✕ Install ArticuShare Package
- ✕ Setup User Access

INSTALL ARTICUSHARE PACKAGE

After following the installation instructions from the AppExchange you should see the following screen as you install ArticuShare.

① Click the Continue button to proceed.

Package Installation Details

Package Name: ArticuShare
Version Name: 1Q2011
Version Number: 1.0 (Beta 4)
Publisher: Hani.Id.au
Description:

① Continue Cancel

Package Components

▼ Apps (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	ArticuShare		App	This is a brand new component.

▼ Code (6)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	TestASRefreshNotificationAddresses		Apex Class	This is a brand new component.
Create	ArticuShareRefreshNotificationDetails		Apex Class	This is a brand new component.
Create	TestASRefreshNotificationDetails		Apex Class	This is a brand new component.
Create	TestASGetNotificationDetails		Apex Class	This is a brand new component.
Create	ArticuShareGetNotificationDetails		Apex Class	This is a brand new component.
Create	ArticuShareRefreshNotificationAddresses		Apex Class	This is a brand new component.

▼ Fields (35)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Share Entity Name	Share_Entity__c	Custom Field	This is a brand new component.
Create	Missing Postal Addresses	NotificationAddresses__c	Custom Field	This is a brand new component.
Create	Email	Shareholder__c	Custom Field	This is a brand new component.
Create	Suffix	Shareholder__c	Custom Field	This is a brand new component.
Create	Town or City	Shareholder__c	Custom Field	This is a brand new component.
Create	Share Entity	Join_Shareholder_to_Share_Entity__c	Custom Field	This is a brand new component.
Create	Street Line 1	Shareholder__c	Custom Field	This is a brand new component.
Create	Street Line 2	Shareholder__c	Custom Field	This is a brand new component.
Create	Description	Share_Entity__c	Custom Field	This is a brand new component.
Create	Notify by Email	NotificationAddresses__c	Custom Field	This is a brand new component.
Create	Missing Email Addresses	NotificationAddresses__c	Custom Field	This is a brand new component.

INSTALL ARTICUSHARE PACKAGE

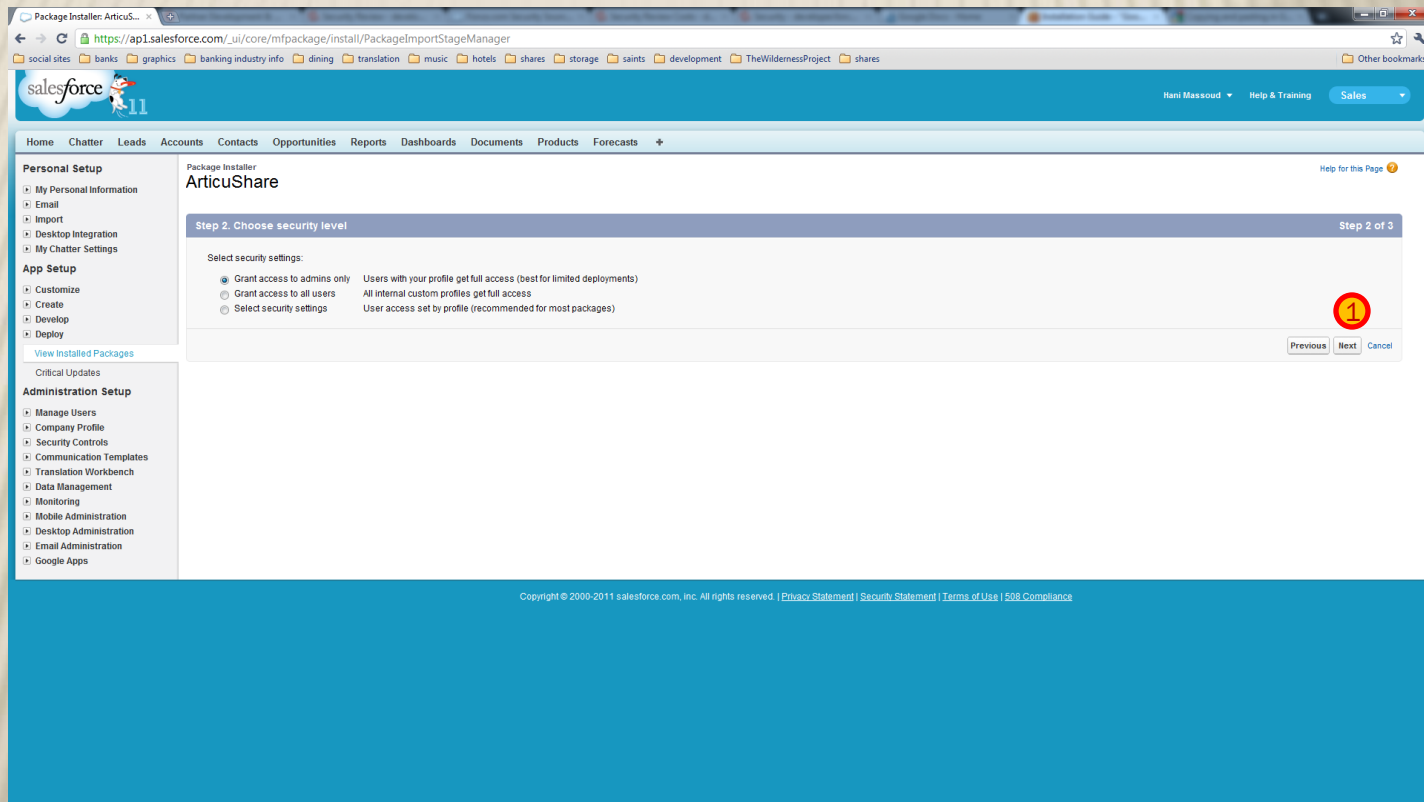
① When asked to Approve Package API Access, accept the default values and click the Next button

The screenshot shows the Salesforce Package Installer interface for the ArticShare package. The page is titled "Step 1. Approve Package API Access" and "Step 1 of 3". It contains a table of permissions for the package, including Accounts, Assets, Campaigns, Cases, Contacts, Contracts, Documents, Ideas, Leads, Opportunities, Price Books, Products, and Solutions. Each row has checkboxes for Read, Create, Edit, and Delete permissions. The "Next" button is highlighted with a red circle and the number 1.

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

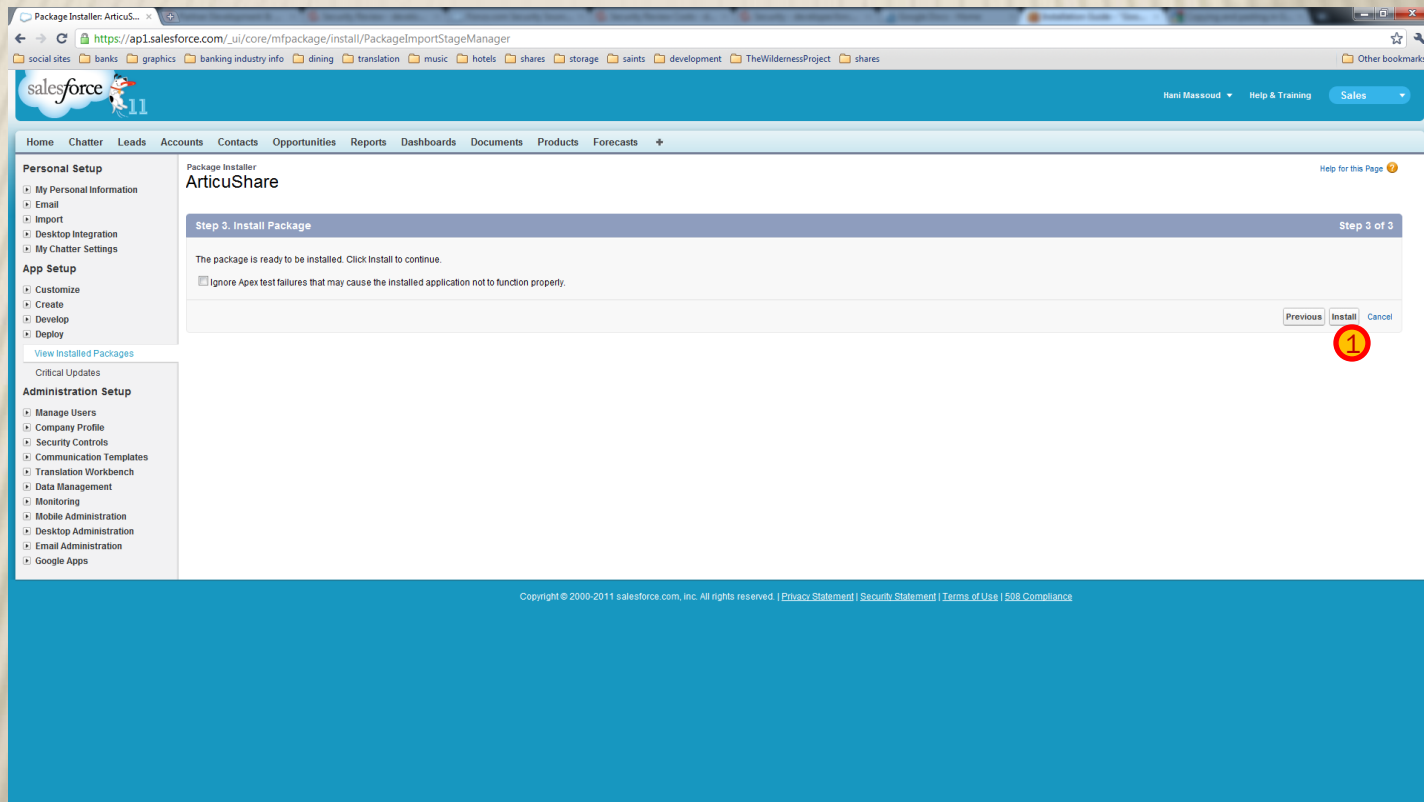
INSTALL ARTICUSHARE PACKAGE

① In the next step, choose “Grant access to admins only” as the security level and click the Next button



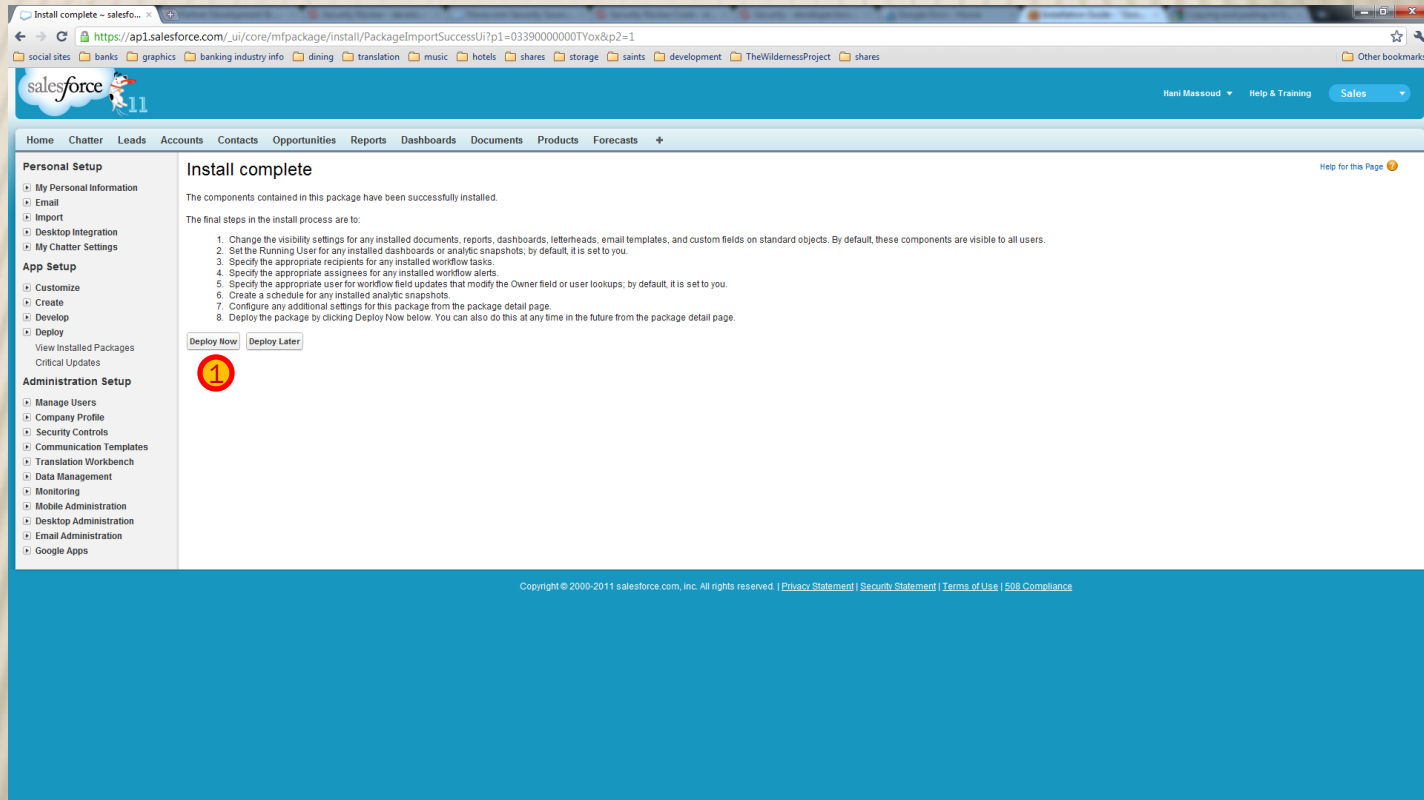
INSTALL ARTICUSHARE PACKAGE

① In the third step, Install Package, accept the default values and click the Next button



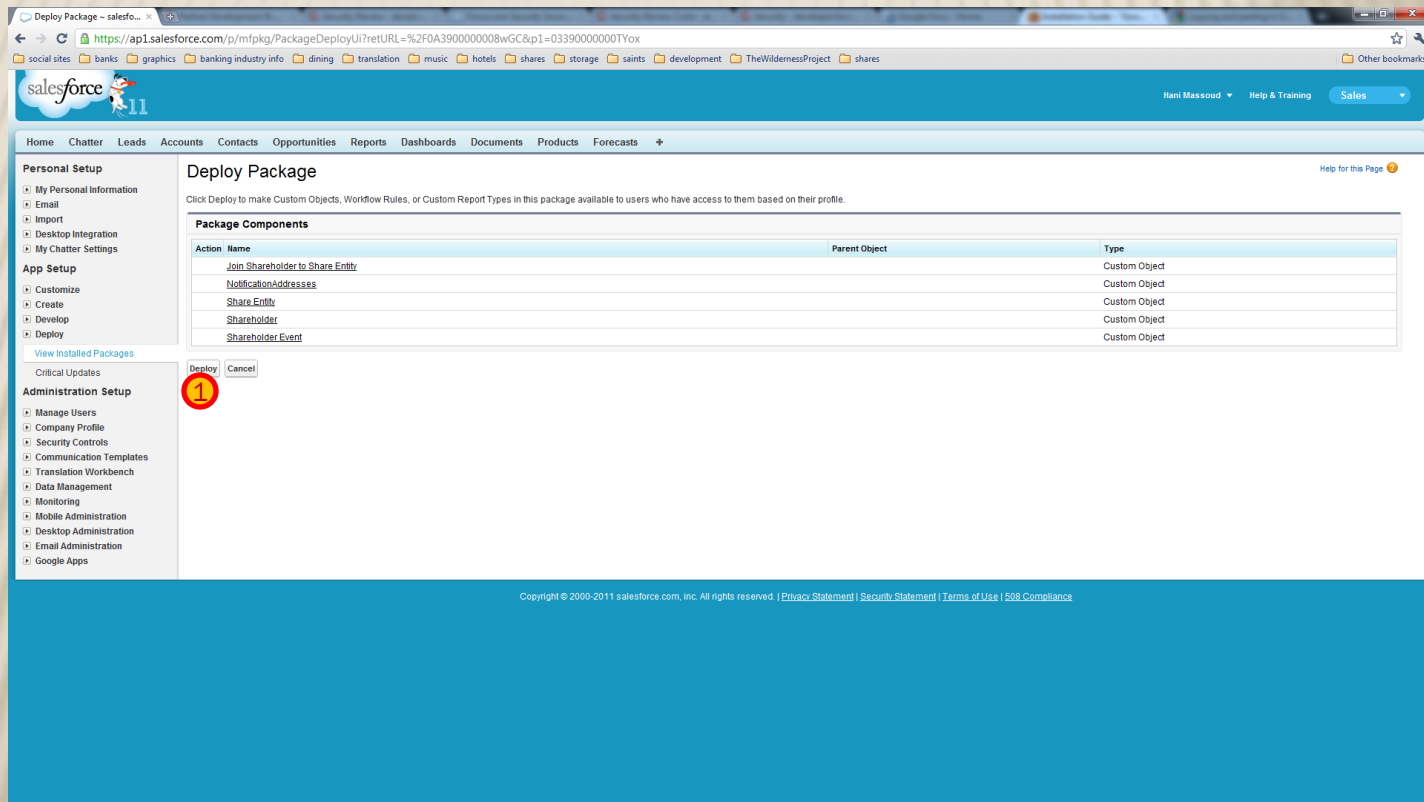
INSTALL ARTICUSHARE PACKAGE

① In the Install Complete page, click the Deploy Now button to deploy the application.



INSTALL ARTICUSHARE PACKAGE

① The Deploy Package page will appear. Click the Deploy button to continue.



INSTALL ARTICUSHARE PACKAGE

- Once the installation is complete, the Installed Package Detail page will appear as shown below. No action is required on this page.

The screenshot shows the Salesforce Package Details page for the ArticuShare (Managed) package. The page is titled "ArticuShare (Managed)" and includes a "Back to List: Development Package" link. A red circle with the number 1 highlights the "Installed Package Detail" section. The package information is as follows:

Field	Value
Package Name	ArticuShare
Language	English
Version Name	1Q2011
Namespace Prefix	hani
Publisher	Hani.id.au
Description	Shareholder meeting and communications manager.
Installed By	Hani Massoud 13/04/2011 4:59 PM

Buttons for "Uninstall", "Deploy", and "Show Dependencies" are available. The "Package Components" table lists various components and their types:

Action Name	Parent Object	Type
All	Shareholder Event	List View
All	Shareholder	List View
All	Share Entity	List View
ArticuShare		App
ArticuShare		Email Template Folder
ArticuShare Logo		Document
ArticuShare Reports		Report Folder
ArticuShareCellNotificationDetails		Apex Class
ArticuShareRefreshNotificationAddresses		Apex Class
ArticuShareRefreshNotificationDetails		Apex Class
Country	Shareholder	Custom Field
Description	Shareholder Event	Custom Field
Description	Share Entity	Custom Field
Email	Shareholder	Custom Field
Event Coordinator	Shareholder Event	Custom Field
Event Name	Shareholder Event	Custom Field
Finish DateTime	Shareholder Event	Custom Field
First Name	Shareholder	Custom Field
Get Notification Addresses	NotificationAddresses	Button or Link
Home Phone	Shareholder	Custom Field
Join Shareholder to Share Entity		Custom Object

CONTENT

- ✖ Overview
- ✖ Install ArticuShare Package
- ✖ Setup User Access

SETUP USER ACCESS

We will now setup the user profile that will have access to ArticuShare.

- 1 Go to User Profiles and click the New button to add the new Profile.

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Name	User License	Custom
Edit	Authenticated Website	Authenticated Website	☐
Edit	Chatter Free User	Chatter Free	☐
Edit	Chatter Moderator User	Chatter Free	☐
Edit	Content Only User	Content Only	☐
Edit	Contract Manager	Salesforce	☐
Edit	Customer Portal Manager	Customer Portal Manager	☐
Edit	Customer Portal Manager Custom	Customer Portal Manager Custom	☐
Edit	Customer Portal Manager Standard	Customer Portal Manager Standard	☐
Edit	Customer Portal User	Customer Portal User	☐
Edit	Force.com - One App User	Force.com - One App	☐
Edit	Gold Partner User	Gold Partner	☐
Edit	High Volume Customer Portal User	High Volume Customer Portal	☐
Edit	Marketing User	Salesforce	☐
Edit	Read Only	Salesforce	☐
Edit	Solution Manager	Salesforce	☐
Edit	Standard Platform User	Salesforce Platform	☐
Edit	Standard User	Salesforce	☐
Edit	System Administrator	Salesforce	☐

SETUP USER ACCESS

- ① When prompted, clone the Standard User profile with the Salesforce license for the ArticuShare User license as shown below
- ② Click Save to generate the new profile.

Clone Profile - salesforce.com

https://ap1.salesforce.com/_ui/common/config/profile/ProfileClone?retURL=%2Fsetup%2Fui%2Fprofilelist.jsp%3Fsetupid%3DProfiles%26retURL%3D%252Fui%252Fsetup%252Fsetup%253Fsetupid%253DUsers&setupid=Profiles

social sites banks graphics banking industry info dining translation music hotels shares storage saints development TheWildernessProject shares

Other bookmarks

salesforce

Hani Massoud Help & Training Sales

Home Chatter Leads Accounts Contacts Opportunities Reports Dashboards Documents Products Forecasts

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
- Develop
- Deploy
- View Installed Packages
- Critical Updates

Administration Setup

- Manage Users**
 - Users
 - Mass Email Users
 - Roles
 - Profiles
- Public Groups
- Queues
- Login History
- Training History

- Company Profile
- Security Controls
- Communication Templates
- Translation Workbench
- Data Management
- Monitoring
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required information

Existing Profile Standard User ①

User License Salesforce

Profile Name ArticuShare User

② Save Cancel

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SETUP USER ACCESS

- 1 Once the ArticuShare User profile is setup it will be displayed for your information.
- 2 Click the Edit button to customize the profile.

The screenshot shows the Salesforce user profile page for 'ArticuShare User'. The page is divided into several sections:

- Personal Setup:** Includes links for My Personal Information, Email, Import, Desktop Integration, and My Chatter Settings.
- App Setup:** Includes links for Customize, Create, Development, and Deploy.
- Administration Setup:** Includes links for Manage Users, Users, Mass Email Users, Roles, Profiles, Public Groups, Queues, Login History, and Training History.
- Profile Detail:** Shows the user's name, license, description, and creation/modification dates. It also includes buttons for Edit, Clone, Delete, and View Users.
- Console Settings:** Shows the console layout.
- Page Layouts:** A table showing the standard object layouts for various objects, including Home Page Layout, Account, Asset, Campaign, Campaign Member, Case, Case Close, Contact, Contract, Ad Group, Google Campaign, SFGA Version, Share Entity, and Shareholder.

The 'Edit' button in the Profile Detail section is highlighted with a red circle and the number 2, indicating the next step in the process.

SETUP USER ACCESS

- 1 In the Custom App Setting section, select the Visible check box for the ArticuShare application. You can optionally set ArticuShare as the default application for this Profile.

The screenshot displays the Salesforce 'Profile Edit' interface for a user named 'ArticuShare User'. The left sidebar contains navigation links for 'Personal Setup', 'App Setup', 'Administration Setup', and 'Company Profile'. The main content area is titled 'Profile Edit: ArticuShare User' and includes a 'Set the permissions and page layouts for this profile.' instruction. The 'Profile Edit' section shows the profile name 'ArticuShare User' and the user license 'Salesforce'. The 'Custom App Settings' section is highlighted, showing a table of applications with 'Visible' and 'Default' checkboxes. The 'ArticuShare' application is listed with both checkboxes checked, and the 'Default' radio button is selected, indicated by a red circle with the number 1. The 'Tab Settings' section shows various tabs like Home, Accounts, and Dashboards, all set to 'Default On'.

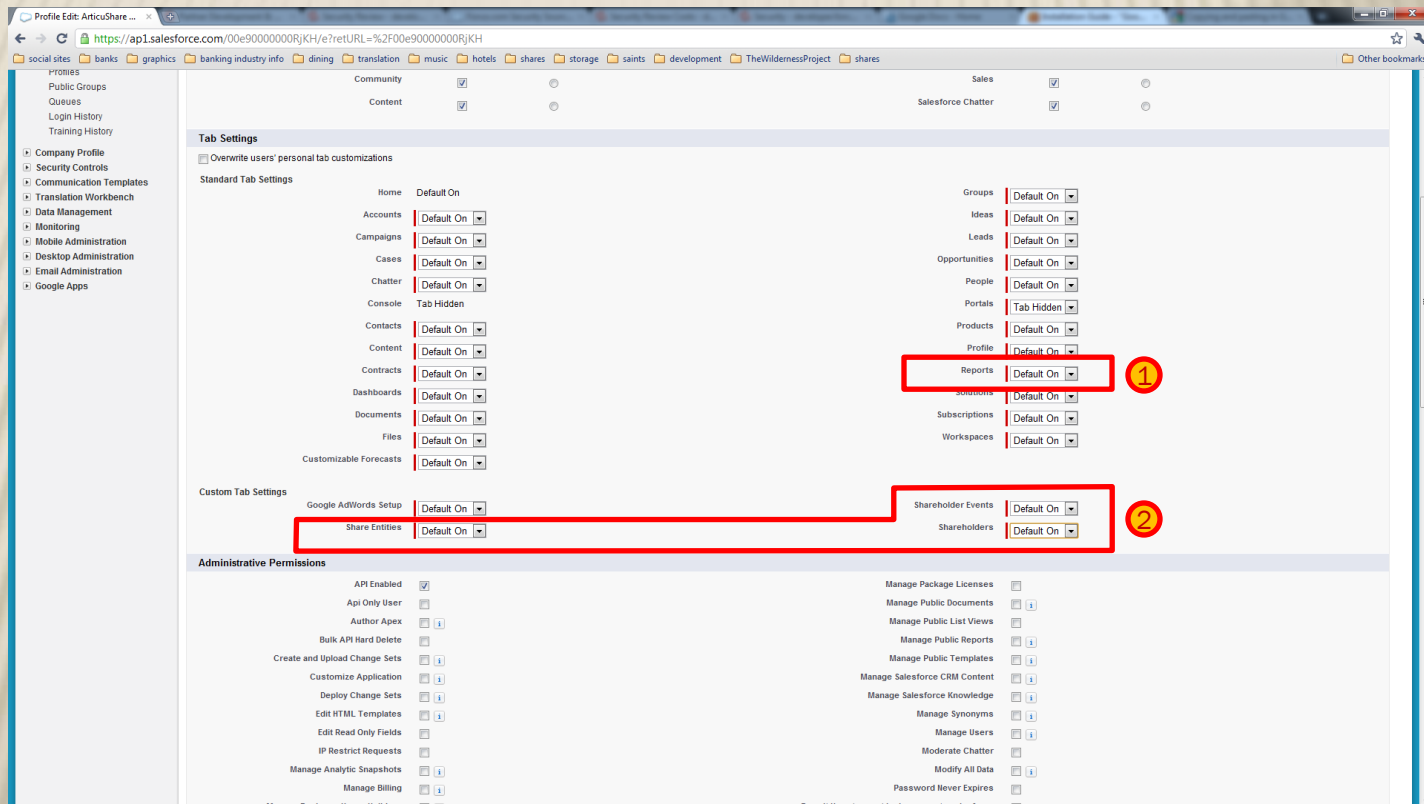
Application	Visible	Default
ArticuShare	☒	☒
Call Center	☒	☐
Community	☒	☐
Content	☒	☐

Application	Visible	Default
Google AdWords	☒	☐
Marketing	☒	☐
Sales	☒	☐
Salesforce Chatter	☒	☐

Tab	Default On
Home	☒
Accounts	☒
Campaigns	☒
Cases	☒
Chatter	☒
Console	☐
Contacts	☒
Content	☒
Contracts	☒
Dashboards	☒

SETUP USER ACCESS

- 1 In the Standard Tab Settings section, make sure that the Report tab is set to Default On.
- 2 In the Custom Tab Settings section, select Default On for the ArticuShare tabs: Share Entities, Shareholder Events and Shareholders.



SETUP USER ACCESS

- 1 In the Custom Object Permissions section, select the Read, Create, Edit and Delete check boxes for the ArticuShare objects.
- 2 Click Save when you are done.

The screenshot shows the 'Profile Edit: ArticuShare' page in Salesforce. The browser address bar shows the URL: <https://ap1.salesforce.com/00e90000000RjKH/e?retURL=%2F00e90000000RjKH>. The page is divided into two main sections: 'Standard Object Permissions' and 'Custom Object Permissions'. Both sections contain tables with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). In the 'Custom Object Permissions' section, a red box labeled '1' highlights the 'Join Shareholders to Share Entities' row, where the 'Read', 'Create', 'Edit', and 'Delete' checkboxes are checked. Another red box labeled '2' highlights the 'Save' button at the bottom of the page. Below the permissions section, there is a 'Desktop Integration Clients' section with dropdown menus for 'Connect for Microsoft Outlook', 'Offline', 'Connect for Lotus Notes', and 'Connect for Office'.

Standard Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Accounts	☒	☒	☒	☒	☐	☐
Assets	☒	☒	☒	☒	☐	☐
Campaigns	☒	☐	☐	☐	☐	☐
Cases	☒	☒	☒	☒	☐	☐
Contacts	☒	☒	☒	☒	☐	☐
Contracts	☒	☒	☒	☒	☐	☐
Documents	☒	☒	☒	☒	☐	☐

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Modify All
Ad Groups	☒	☒	☒	☒	☐	☐
Google Campaigns	☒	☒	☒	☒	☐	☐
Join Shareholders to Share Entities	☒	☒	☒	☒	☐	☐
Keywords	☒	☒	☒	☒	☐	☐
NotificationAddresses	☒	☒	☒	☒	☐	☐
Search Phrases	☒	☒	☒	☒	☐	☐

Desktop Integration Clients

Choose whether users with this profile can use a client, update a client, see client update alerts, or be forced to update to the latest version. To set permissions for Salesforce for Outlook, use the Manage Email Client Configurations permission and define settings in Outlook configurations.

Connect for Microsoft Outlook:

Offline:

Connect for Lotus Notes:

Connect for Office:

SETUP USER ACCESS

- 1 We are almost done with the setup. Just one activity remains: click on the Enabled Apex Class Access link to navigate to the bottom of the Profile Detail page.

The screenshot shows the Salesforce 'Profile: ArticuShare User' page. The left sidebar contains navigation links for 'Personal Setup', 'App Setup', and 'Administration Setup'. The main content area is titled 'Profile: ArticuShare User' and includes a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A red circle with the number '1' highlights the 'Enabled Apex Class Access' link. Below this, the 'Console Settings' and 'Page Layouts' sections are visible, showing various object layouts and their assignments.

Profile Detail	
Name	ArticuShare User
User License	Salesforce
Description	
Created By	Hani Massoud 13/04/2011 5:23 PM
Modified By	Hani Massoud 13/04/2011 6:14 PM

Console Settings	
Console Layout	[Edit]

Page Layouts	
Standard Object Layouts	
Home Page Layout	Dashboard Home Page Default [View Assignment]
Account	Account Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Campaign	Campaign Layout [View Assignment]
Campaign Member	Campaign Member Page Layout [View Assignment]
Case	Case Layout [View Assignment]
Case Close	Close Case Layout [View Assignment]
Contact	Contact Layout [View Assignment]
Contract	Contract Layout [View Assignment]
Event	Event Layout [View Assignment]
Lead	Lead Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]
Product	Product Layout [View Assignment]
Solution	Solution Layout [View Assignment]
Task	Task Layout [View Assignment]
User	User Layout [View Assignment]
Custom Object Layouts	
Ad Group	Ad Group Layout [View Assignment]
Google Campaign	Google Campaign Layout [View Assignment]
Join Shareholder to Share Entity	Join Shareholder to Share Entity Layout
SFGA Version	Kieden Version Layout [View Assignment]
Share Entity	Share Entity Layout [View Assignment]
Shareholder	Shareholder Layout

SETUP USER ACCESS

① In the Enabled Apex Class Access section of the Profile Detail page, click the Edit button.

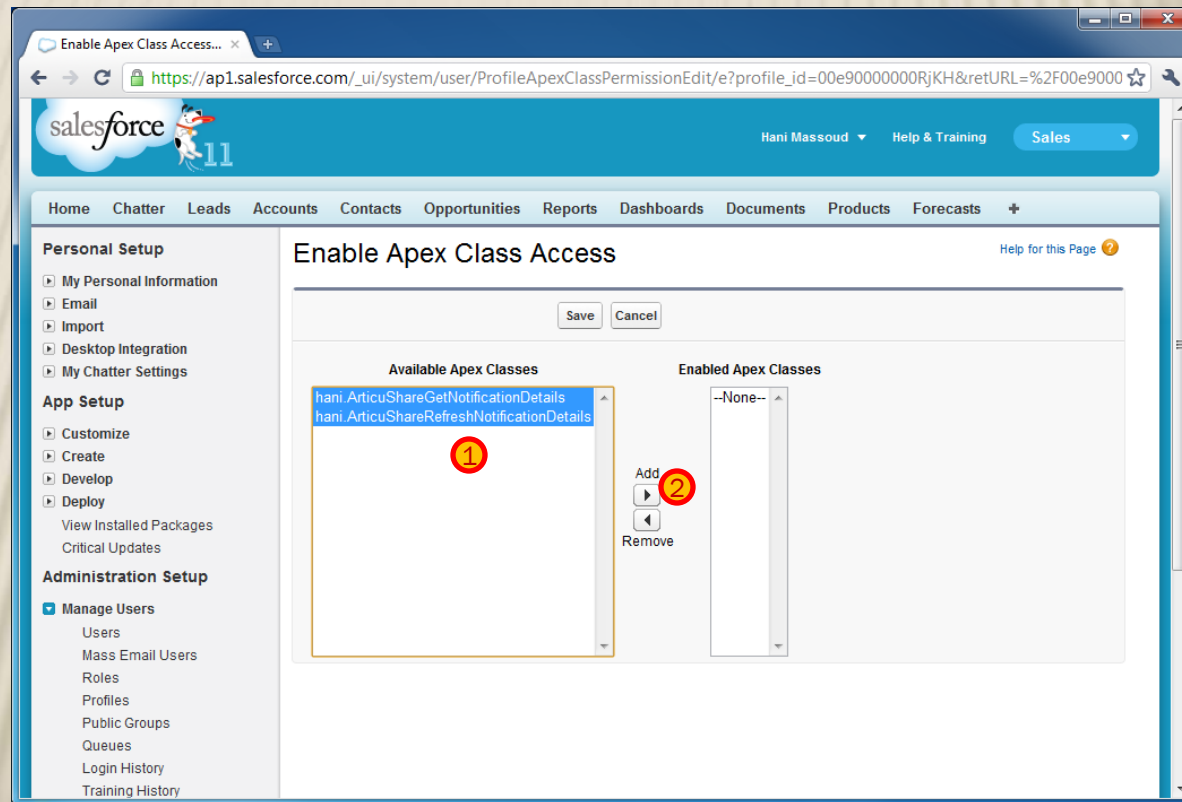
The screenshot displays the Salesforce Profile Detail page for 'ArticuShare User'. The page is divided into several sections:

- Object Permissions:** A table listing permissions for various objects (Assets, Campaigns, Cases, Contracts, Documents, Leads, Opportunities, Price Books, Products, Solutions). Each object has checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
- Custom Object Permissions:** A table listing permissions for custom objects (Ad Groups, Google Campaigns, Join Shareholders to Share Entities, Keywords, NotificationAddresses, Search Phrases, SFGA Version, Share Entities, Shareholders, Shareholder Events, Text Ads). Each object has checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
- Desktop Integration Clients:** A section for managing desktop integration clients, including 'Connect for Microsoft Outlook' and 'Connect for Office'.
- Login Hours:** A section for managing login hours, with a 'No login hours specified' message.
- Login IP Ranges:** A section for managing login IP ranges, with a 'No login IP ranges specified' message.
- Enabled Apex Class Access:** A section for managing Apex class access, with a 'No Apex Classes enabled' message. A red circle with the number 1 highlights the 'Edit' button.
- Enabled Visualforce Page Access:** A section for managing Visualforce page access, with a 'No Visualforce Pages enabled' message.

At the bottom of the page, there is a footer with copyright information: 'Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

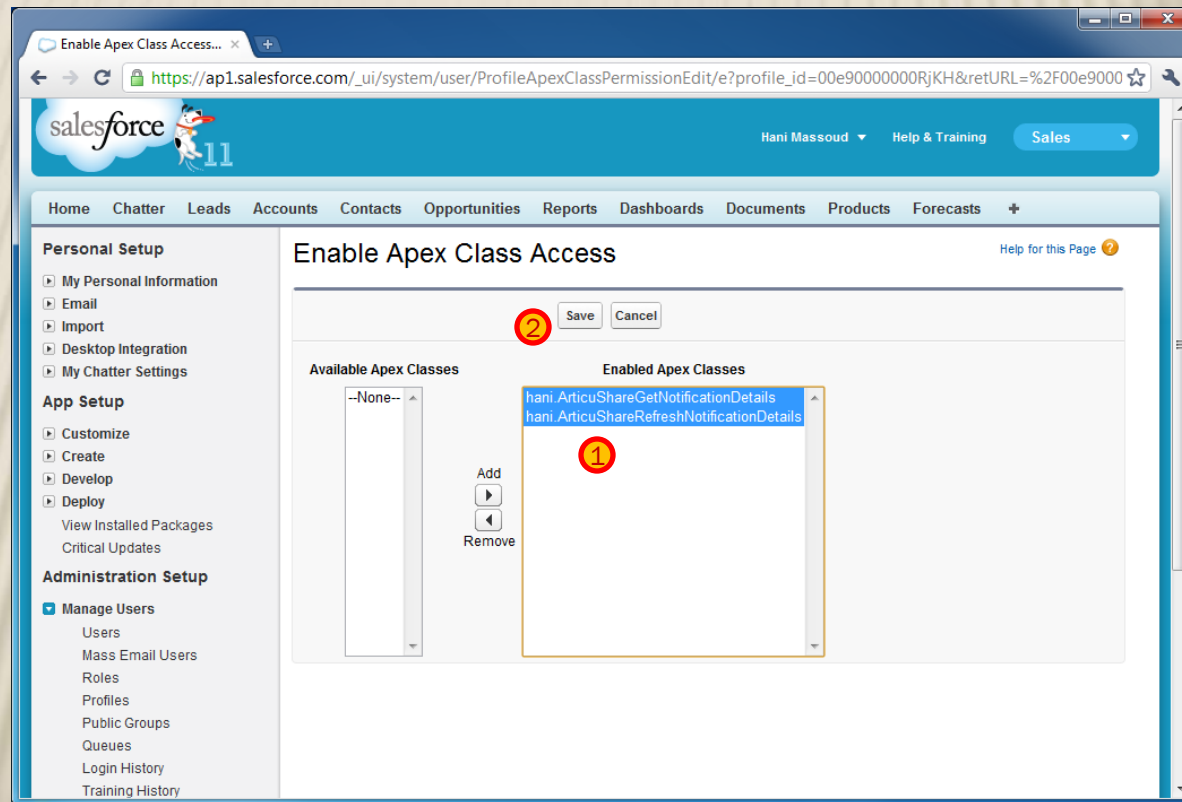
SETUP USER ACCESS

- 1 Select both classes in the Available Apex Classes list
- 2 Click the Add arrow



SETUP USER ACCESS

- ① The two classes should now be listed in the Enabled Apex Classes list as shown below.
- ② Click Save to commit your changes.



SETUP USER ACCESS

① Notice that there are two Enabled Apex Classes.

We are now done with the installation and setup. Users assigned to the ArticuShare User Profile can now use ArticuShare to manage shareholder events and communications.

The screenshot shows the Salesforce user profile setup page for 'ArticuShare User'. The page is divided into several sections: Personal Setup, App Setup, and Administration Setup. A red circle with the number 1 highlights the 'Enabled Apex Class Access' section, which lists two enabled classes: 'Login IP Ranges' and 'Enabled Visualforce Page Access'.

Profile Detail

Field	Value
Name	ArticuShare User
User License	Salesforce
Description	
Created By	Hani Massoud, 13/04/2011 5:23 PM
Modified By	Hani Massoud, 13/04/2011 6:14 PM

Console Settings

Field	Value
Console Layout	[Edit]

Page Layouts

Standard Object Layouts	Custom Object Layouts
Home Page Layout: Dashboard Home Page Default [View Assignment]	Ad Group: Ad Group Layout [View Assignment]
Account: Account Layout [View Assignment]	Google Campaign: Google Campaign Layout [View Assignment]
Asset: Asset Layout [View Assignment]	Join Shareholder to Share Entity: Join Shareholder to Share Entity Layout [View Assignment]
Campaign: Campaign Layout [View Assignment]	SFGA Version: Kieden Version Layout [View Assignment]
Campaign Member: Campaign Member Page Layout [View Assignment]	Share Entity: Share Entity Layout [View Assignment]
Case: Case Layout [View Assignment]	Shareholder: Shareholder Layout [View Assignment]
Case Close: Close Case Layout [View Assignment]	
Contact: Contact Layout [View Assignment]	
Contract: Contract Layout [View Assignment]	

ArticuShare v1.1

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www.commerity.com/profile/hani

THANK YOU FOR USING ARTICUSHARE