

Mimiran Salesforce AppExchange Setup Guide

Introduction

Combining Mimiran and Salesforce.com gives you the power of Mimiran makes it even easier to close deals.

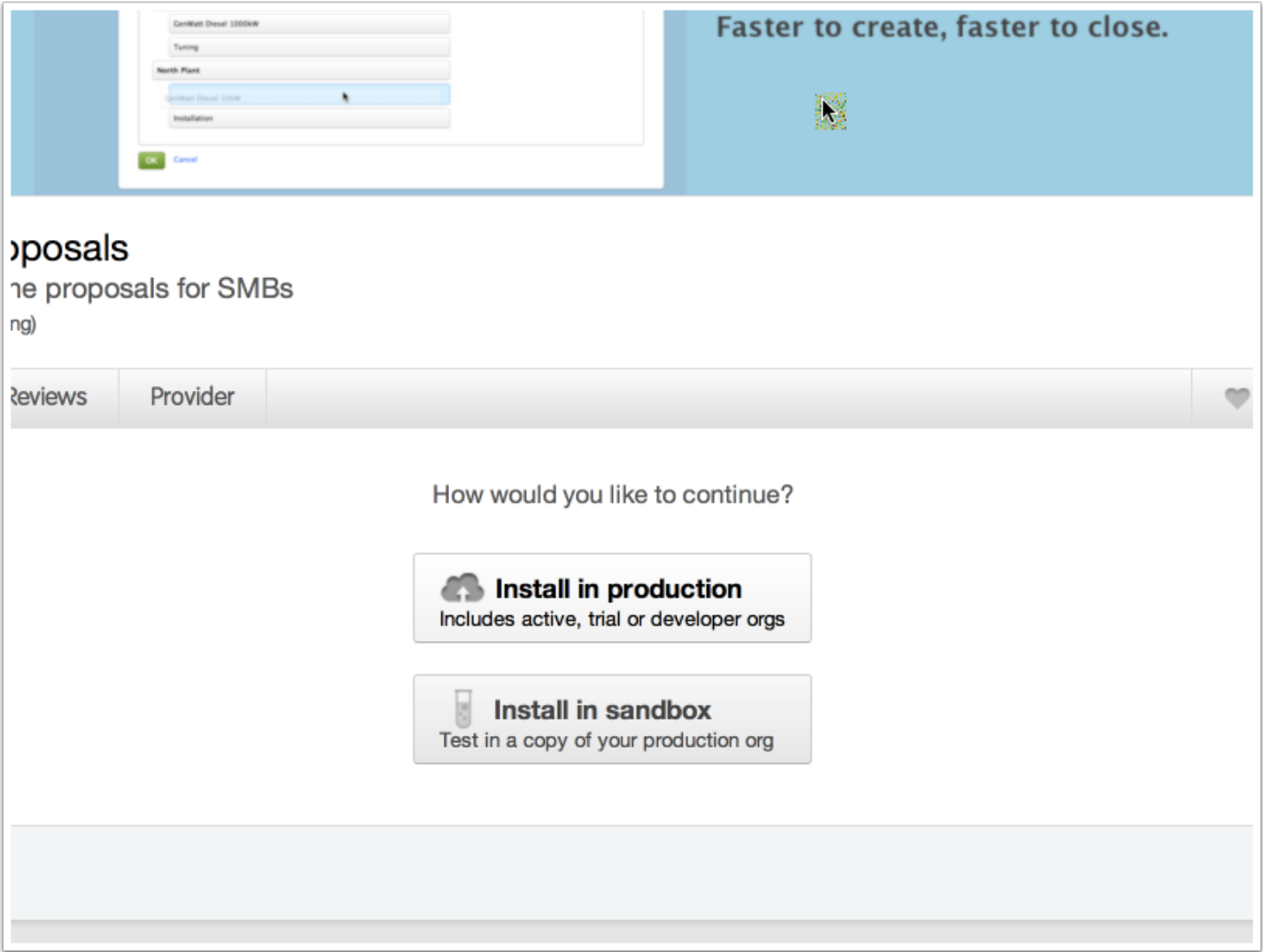
- You can use Mimiran to quickly configure and price line items, using a faster, more intuitive interface than the default Salesforce.com screens, with more power for pricing, including volume discounts.
- You can send proposals to your Salesforce.com contacts without having to reenter contact information.
- Close your opportunities faster by getting notifications when prospects are reading your proposal, and viewing a history of which sections they have read, so you can call at the right time.
- Collaborate and close by responding to questions and updating your proposal in minutes, and let prospects sign online.

This document describes how to configure Salesforce.com and Mimiran to work together.

Don't be alarmed by the length-- it's mostly screenshots.

If you haven't signed up for your Mimiran account yet, you [can create an account in about a minute](#).

Get It Now



Click Get It Now button on [Mimiran's AppExchange page](#).
Select the appropriate instance for installation. Salesforce.com will ask for your login credentials.

Package Installation Details

Package Installation Details

Package NameMimiran CPQ+Proposals

Version NameSpring 13

Version Number2.6

PublisherMimiran

Description

ContinueCancel

Package Components

▼ Objects (1)

Action	Component Name	Parent Object	Component
Create	Mimiran URL		Custom Set

▼ Resources (2)

Action	Component Name	Parent Object	Component
Create	Upload Products from Mimiran		Button or Li
Create	Edit in Mimiran	Opportunity Product	Button or Li

▼ Fields (9)

Action	Component Name	Parent Object	Component
Create	Mimiran_ID	Account	Custom Fiel
Create	Mimiran_ID	Product	Custom Fiel
Create	Subdomain	URL__c	Custom Fiel
Create	Unit List Price	Opportunity Product	Custom Fiel

This page lists the components the Mimiran package will install. Click Continue.

Approve Package API Access

Package Installer

Mimiran CPQ+Proposals

Help for this Pa

Step 1. Approve Package API Access

Step 1

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

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

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next

C

This page indicates that Mimiran needs API access. Click Next.

Determine Which Users Have Access

Package Installer
Mimiran CPQ+Proposals
[Help for this Pa](#)

Step 2. Choose security level
Step 2

Select security settings:

- ☐ Grant access to admins only Users with your profile get full access (best for limited deployments)
- ☒ Grant access to all users All internal custom profiles get full access
- ☐ Select security settings User access set by profile (recommended for most packages)

Previous Next C

In order to log in to Mimiran, your users must have a Mimiran account. You only pay Mimiran for your Mimiran accounts. For example, if you have 200 Salesforce.com users, but only need 100 Mimiran users, you would only pay for 100 Mimiran accounts. However, you probably want to grant potential access to Mimiran to all your users, and then use page layouts to determine who can click into Mimiran. (If non-Mimiran users accidentally click over from Salesforce.com, they will get a message saying that they need an account.)

Select "Grant access to all users" and click Next.

Install Package

Package Installer
Mimiran CPQ+Proposals
[Help for this Pa](#)

Step 3. Install Package
Step 3

The package is ready to be installed. Click Install to continue.

Previous Install C

Click Install.

Configure Mimiran URL in Salesforce.com

Custom Settings

Help for this Page ?

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

Percentage of custom settings data used: 0%
You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View:

All

[Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New								
Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Mimiran URL	Public	Hierarchy	Mim	Setting for configuring the path to your Mimiran instance.	355	0	0

Under Setup > Develop > Custom Settings, you'll see a Mimiran URL setting. Click the Manage action link.

Enter Your Subdomain

Mimiran URL Edit

Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

Edit Mimiran URL

SaveCancel

Mimiran URL Information

= Required Information

Location

Subdomain ?mydomain

Enter you subdomain. For example, if you signed up for "awesomeco.mimiran.com", enter "awesomeco".
Click Save.

Mimiran Salesforce AppExchange Setup Guide

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Create an "App" for Mimiran

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management **New!**
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps

Build

- Customize
- Create**
 - Apps**
 - Custom Labels
 - Interaction Log Layouts
 - Objects
 - Packages
 - Report Types
 - Global Actions **New!**
 - Tabs
 - Workflow & Approvals
 - Develop

You can customize existing apps to match the way you work, or build new apps by grouping stand

Custom apps work in conjunction with User Profile Tab Visibility settings. [View User Profiles now.](#)

Apps

Quick Start New Reorder

Action	App Label	Service Cloud Console	Custom	Description
Edit	Call Center	☐	☐	State-of-the-Art On-Demand Customer Serv
Edit	Community	☐	☐	Salesforce CRM Communities
Edit	Content	☐	☐	Salesforce CRM Content
Edit	Marketing	☐	☐	Best-in-class on-demand marketing automati
Edit	Platform	☐	☐	The fundamental Force.com platform
Edit	Sales	☐	☐	The world's most popular sales force automa
Edit	Salesforce Chatter	☐	☐	The Salesforce Chatter social network, Includ
Edit	Sample Console	☒	☐	The out-of-the box Service Cloud console for screen
Edit	Site.com	☐	☐	Build pixel-perfect, data-rich websites using t manage content and published sites.

Connected Apps

New

No Apps found.

(Note: This used to be called Remote Access in earlier versions of Salesforce.com.)

Go to Setup > Create > App, and click the New button to create a new Connected App.

Configure App Settings

▼ Basic Information

Connected App Name

Mimiran

API Name

Mimiran

Description

Mimiran CPQ + Proposals

Logo Image URL

Icon URL

Info URL

Start URL

Mobile Start URL

Contact Phone

Contact Email

support@mydomain.com

▼ OAuth Settings

Enable OAuth Settings

☒

Callback URL

https://mydomain.mimiran.com/auth/salesforce/callback

Use digital signatures

☐

Selected OAuth Scopes

Available OAuth Scopes

Access and manage your Chatter feed (chatter_api)

Access your basic information (id)

Full access (full)

Provide access to custom applications (visualforce)

Provide access to your data via the Web (web)

Add

Remove

Selected OAuth Scopes

Access and manage your data (api)

Perform requests on your behalf at any time

1. Enter settings for the App Name and API Name. You do not need to enter any of the URL fields.
2. Select the checkbox to Enable OAuth Settings.
3. Enter the callback url, which is of the form `https://mydomain.mimiran.com/auth/salesforce/callback`. NOTE: replace "mydomain" in the URL with your Mimiran subdomain. For example, if your Mimiran account is at "https://awesomeco.mimiran.com", your callback URL would be "https://awesomeco.mimiran.com/auth/salesforce/callback". If you do not enter your subdomain correctly, you will not be able to connect.
4. Select the "Access and manage your data (api)" and "Perform request on your behalf at any time (refresh_token)" OAuth Scopes and click the Add button to move that scope to the Selected OAuth Scopes list.
5. Click Save.

Gather Consumer Key and Secret

▼ OAuth Settings			
Consumer Key	3MVG9A2kN3Bn17htbrO0sRPXXbSyvgfHVAwdXoNfzM0HvTG7I5T4YebJK7RcwgYw1JZWgcCj8GKfXoWQnCX.M	Consumer Secret	Click to reveal
Selected OAuth Scopes	Access and manage your data (api)	Callback URL	https://mydoma

When you have created your App, Salesforce will show you a summary page, including the Consumer Key and Consumer Secret (note that you have to click on the Consumer Secret to reveal it). You will need the values in these fields when you configure the Mimiran side of the integration.

Create Salesforce.com Integration in Mimiran

Welcome Proposals Customers Import Data Admin & More ▼ Help

Integration

Set up your integration to Salesforce.com or 37 Signals CRM system Highrise.

(Contact us to connect to upload a CSV export of product or customers data, configure Oracle Fusion integration, or integrate with SugarCRM. Mimiran can also create custom integrations for other systems.)

[Set Up Highrise Integration](#)
[Set Up Salesforce.com Integration](#)
[Set Up Oracle Fusion Integration](#)

1. Login to your Mimiran account.
2. Click Import Data on the main navigation menu.
3. Click the Set Up Salesforce.com Integration button.

Configure Salesforce.com Integration in Mimiran

Welcome Proposals Customers Import Data Admin & More Help

Set Up Integration

Consumer Key *
The consumer key for your remote access application.
3MVG9A2kN3Bn17htbrO0sRPXXbSyvgfH

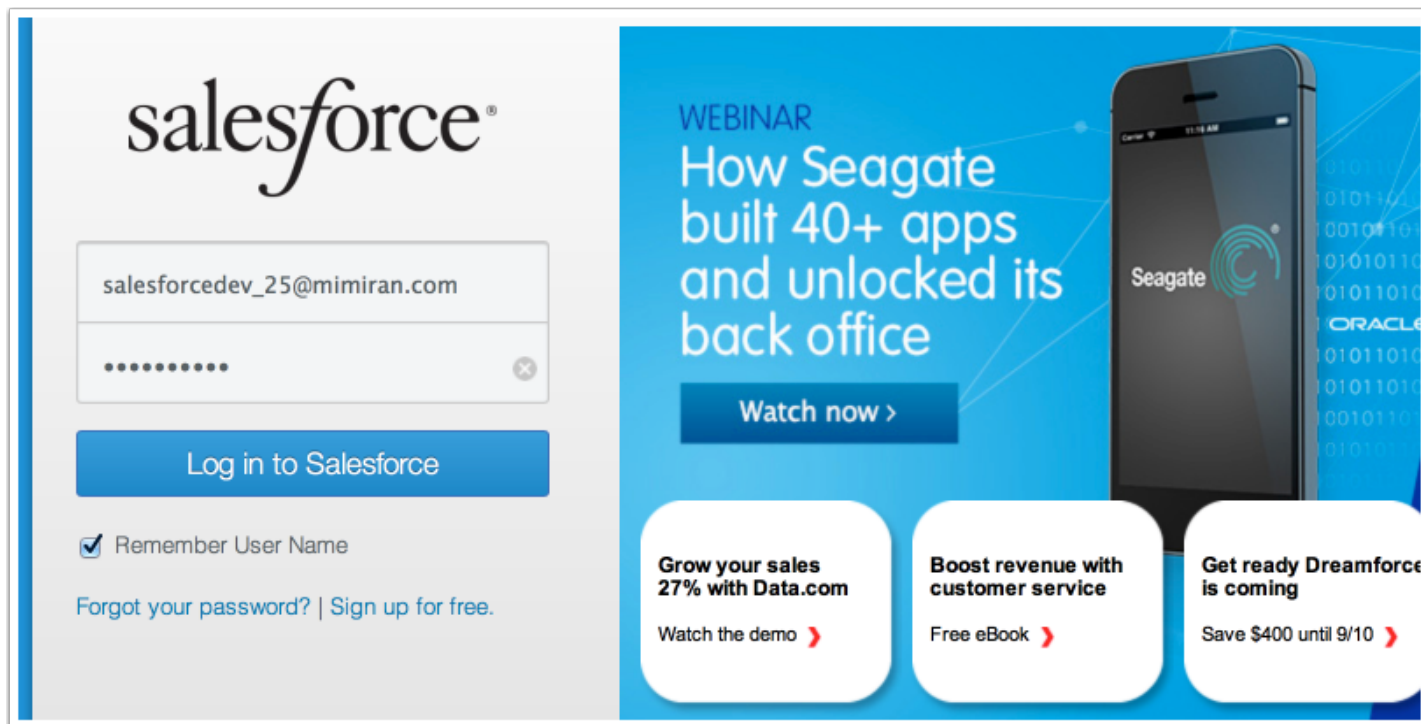
Consumer Secret *
The consumer secret for your remote access application.

Sync Items * ☒
Only select if you are using Products and Line Items in salesforce.com.

OK Cancel

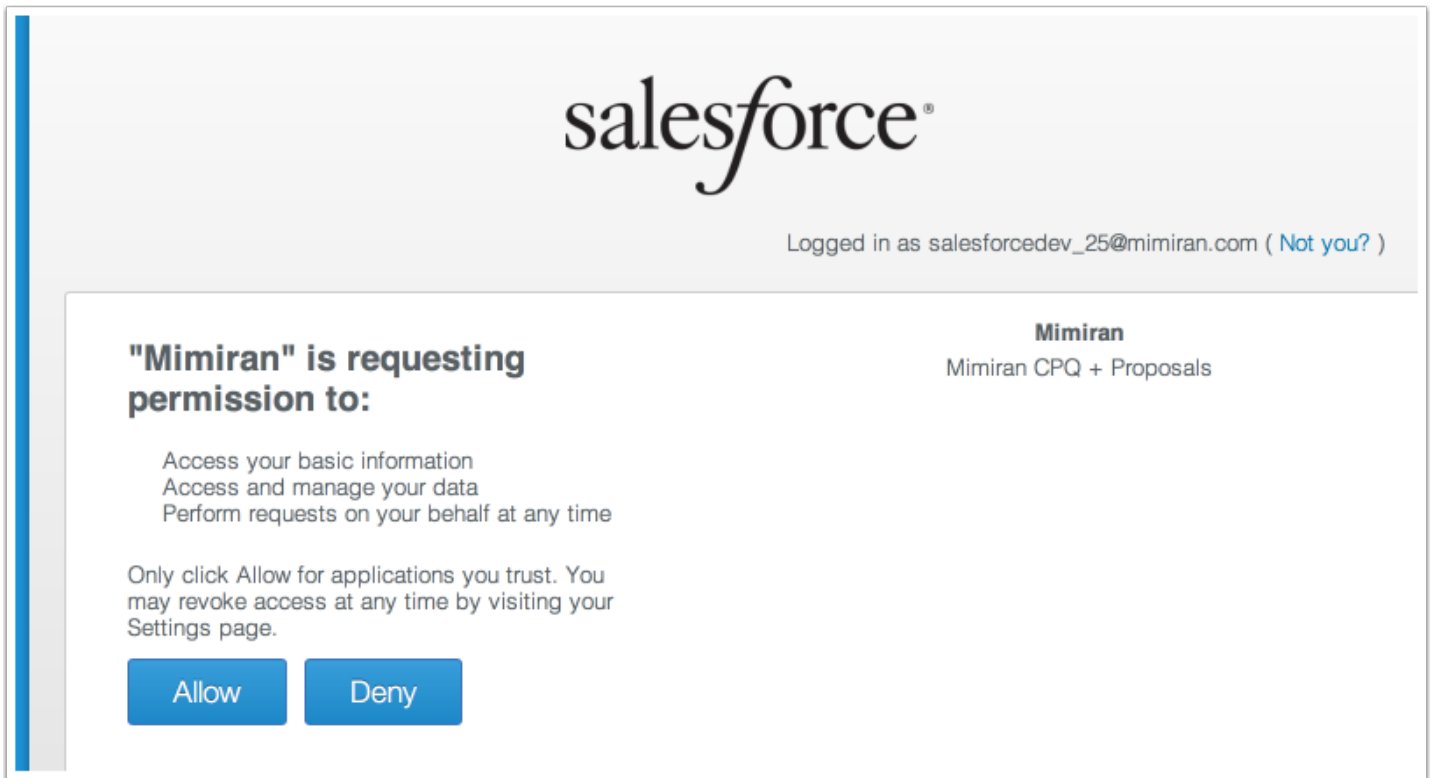
Enter your Consumer Key and Consumer Secret from the OAuth settings in Salesforce.com. If you are using Products and Line Items in Salesforce.com, select the "Sync Items" checkbox. This will instruct Mimiran to sync product, pricing, and line item data. Otherwise, leave this this unchecked.

Authorizing Mimiran in Salesforce



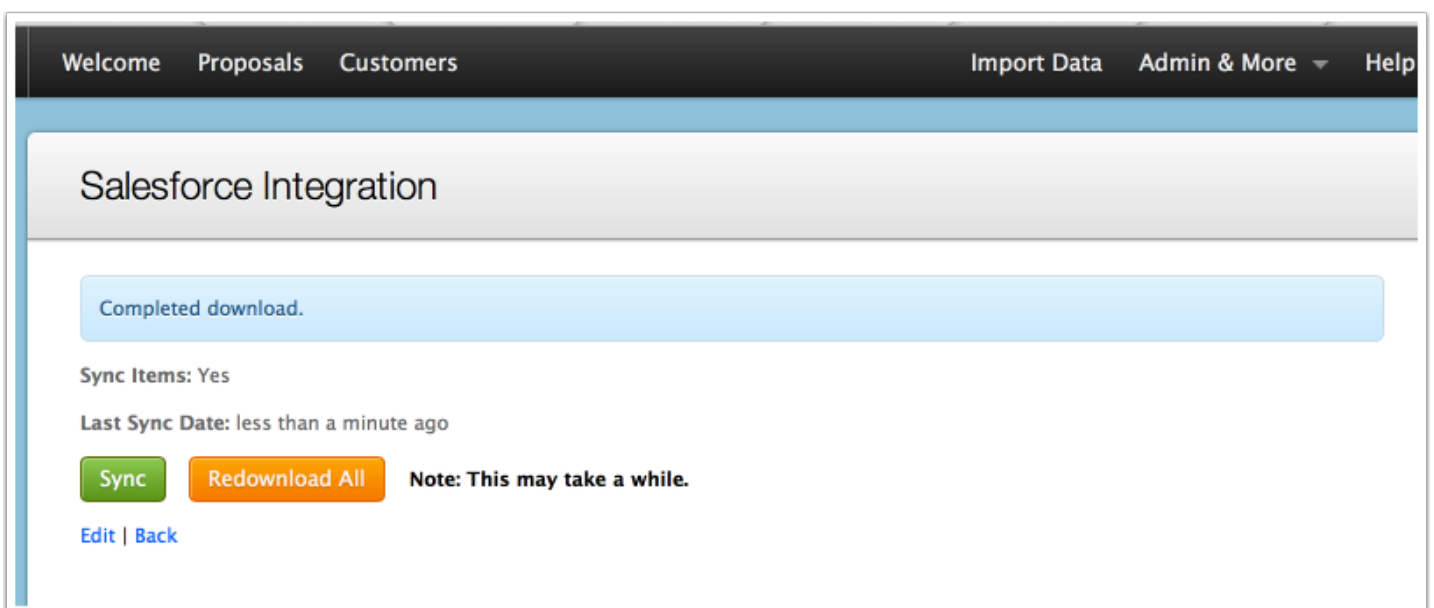
After you click OK, Mimiran will redirect to a Salesforce.com login page. (Unless you are already logged in.)

Grant Access



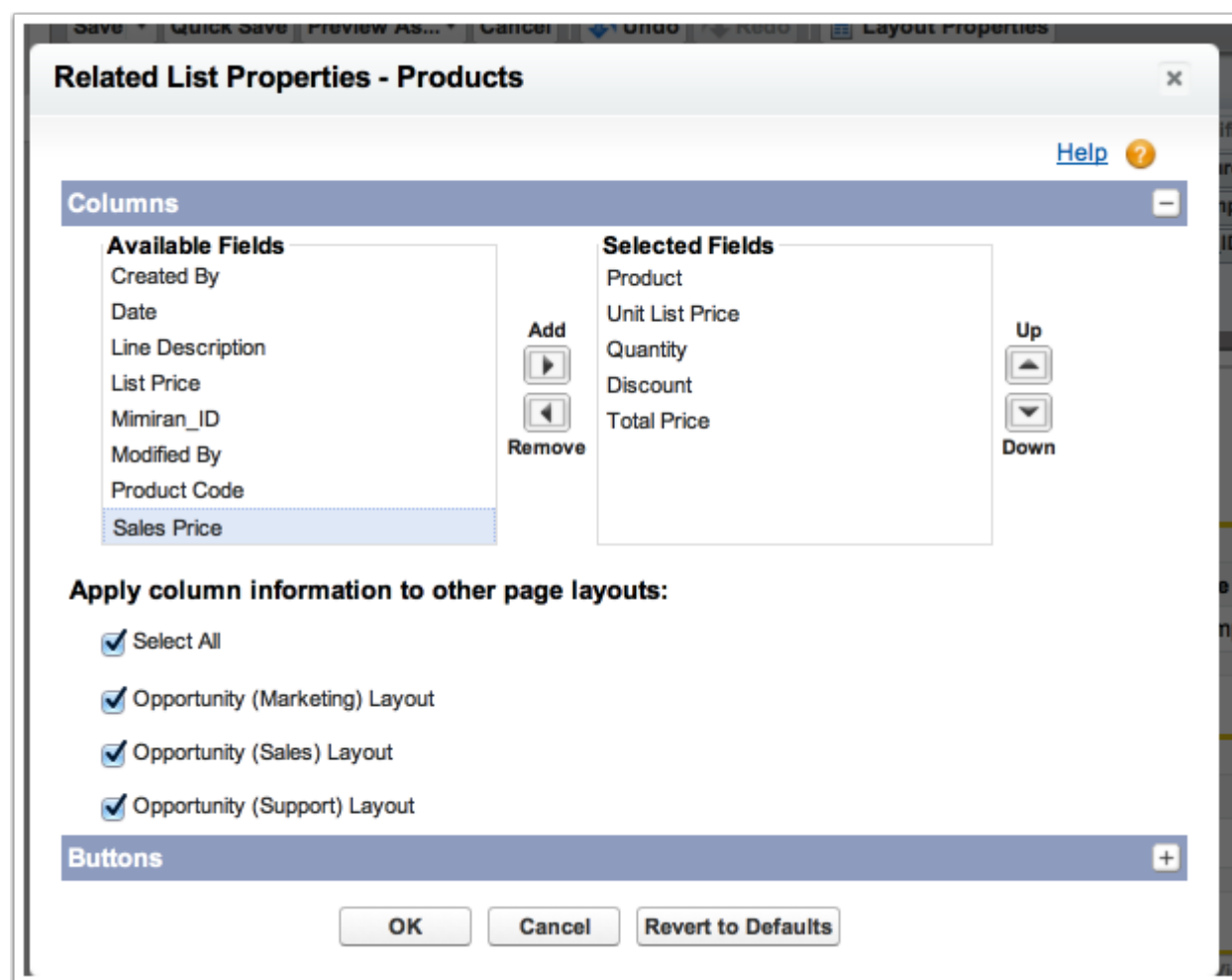
Mimiran requests permission to access your data. This will let Mimiran read account, contact, opportunity, pricebook, and product data, and write back opportunity and opportunity line item data. Please click "Allow", or none of this will work. ;-)

Sync



Mimiran will perform a sync of your data. You can sync again from this screen (note that Mimiran also syncs data when you click over from Salesforce.com).

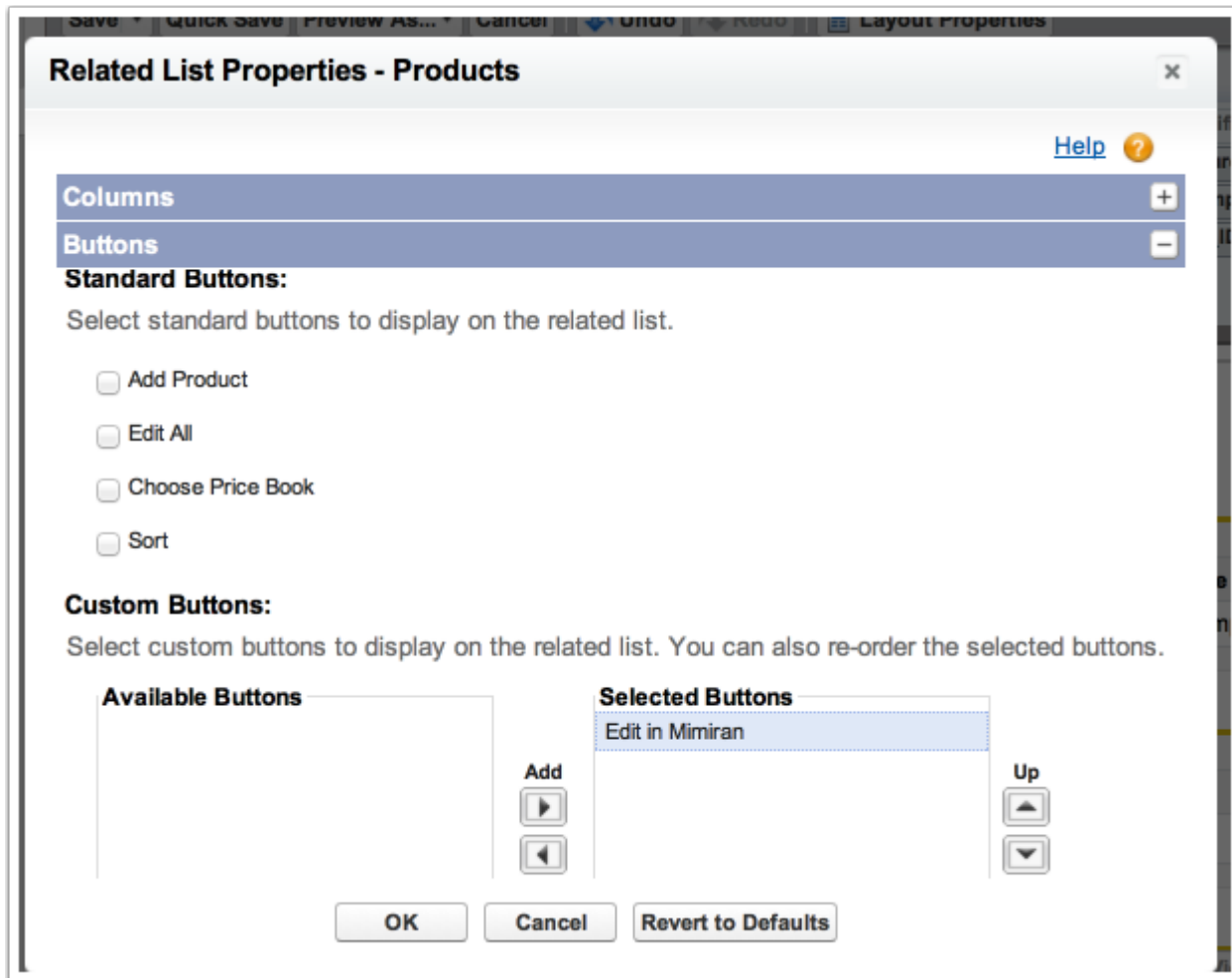
Setting Up the Opportunity Page Layout



In Salesforce.com, we need to set up the Opportunity Page Layout to work with Mimiran.

1. Under Setup > Customize > Opportunities > Page Layouts, select the layout(s) you wish to use with Mimiran.
2. Click the wrench on the product related list to configure.
3. Adjust the Selected Fields to reflect the image above.

Configuring the Buttons



1. Click on the "+" sign on the Buttons section. (It can be a bit hard to see-- depending on your screen, it may be hiding down there.)
2. Uncheck all the standard buttons.
3. Move the "Edit in Mimiran" button from Available to Selected.
4. Click OK.

Managing Salesforce.com Opportunities in Mimiran

« [Back to List: Custom Apps](#)

[Products \(Standard Price Book\) \(1\)](#)

Opportunity Detail Edit Delete Clone

Opportunity Owner	R.S. [Change]	Amount	\$1,000,000.00
Private	☐	Expected Revenue	\$750,000.00
Opportunity Name	Big New Opp	Close Date	9/3/2013
Account Name	Burlington Textiles Corp of America	Stage	Proposal/Price Quote
		Probability (%)	75%
Created By	R.S. , 9/3/2013 11:03 AM	Last Modified By	R.S. , 9/3/2013 11:10 AM
Description			
Custom Links	Delivery Status		

Edit Delete Clone

Products (Standard Price Book) Edit in Mimiran [Products \(Standard Price Book\)](#)

Action	Product	Unit List Price	Quantity
Edit Del	GenWatt Diesel 1000kW	\$100,000.00	10.00

^ [Back To Top](#) Always show me [more](#) records per related list

Now you can edit opportunities in Mimiran. Just click the "Edit in Mimiran" button. This will jump the user over to Mimiran, where they can easily add products, bundles, and groups, apply discounts, and create proposals.

Adding Products in Mimiran

[Welcome](#) [Proposals](#) [Customers](#) [Return to salesforce.com](#) [Import Data](#) [Admin & More](#) ▾

Add Product to Quote

[Products](#) [Bundles](#) [Group](#) [Create New Product](#)

Search: Show entries

Name	SKU	Category	Family	Quantity
GenWatt Gasoline 750kW	GenWatt Gasoline 750kW			
GenWatt Propane 1500kW	GenWatt Propane 1500kW			
GenWatt Propane 500kW	GenWatt Propane 500kW			

Showing 1 to 3 of 3 entries (filtered from 20 total entries)

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

[Add](#)

[Close](#)

Now you can add items in Mimiran, have Mimiran calculate the appropriate price (including volume discounts!), and return to Salesforce.com when you're done, or go on and create a proposal.