

Oppex package

Installation guide

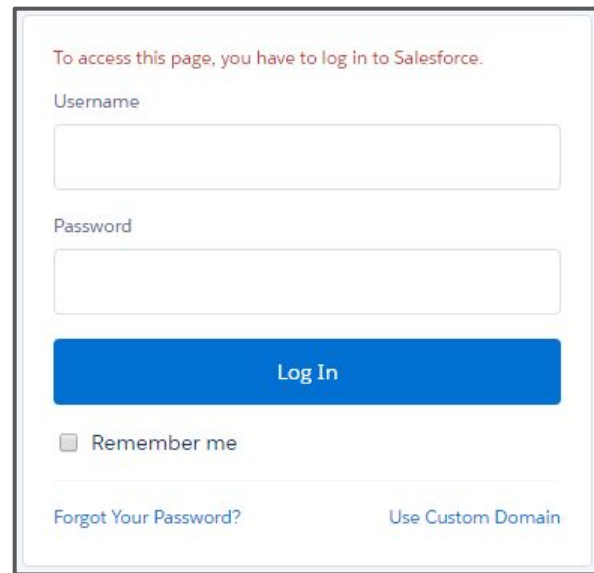
Step 1: Package installation

There are two ways to install the package:

- From Salesforce AppExchange™;
- via installation link.

Only System Administrator is able to perform the installation.

You may be asked for your Salesforce login information during the installation process (not necessary if you are already logged in).

A screenshot of the Salesforce login interface. At the top, a red message states: "To access this page, you have to log in to Salesforce." Below this, there are two input fields: "Username" and "Password". A blue "Log In" button is positioned below the password field. Under the button is a checkbox labeled "Remember me". At the bottom, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right.

To access this page, you have to log in to Salesforce.

Username

Password

Log In

☐ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

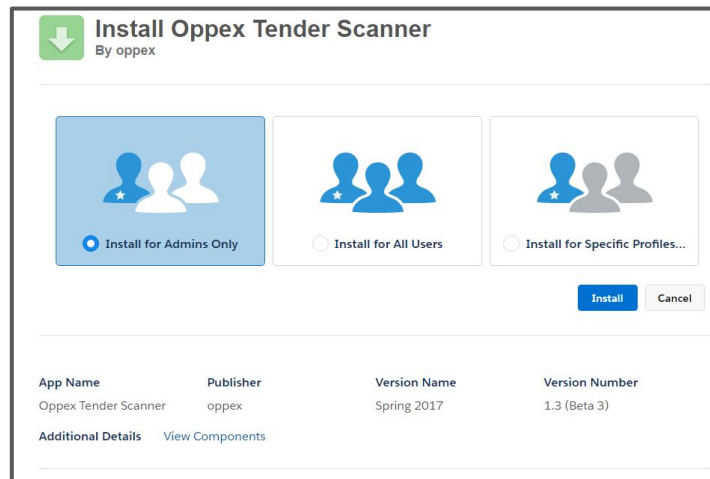
Step 2: Assign basic package permissions

There are three installation options proposed by the platform:

- Install for Admins Only;
- Install for All Users;
- Install for Specific Profiles (recommended).

This will grant basic package access permissions to selected users. You will be able to assign this permissions manually later.

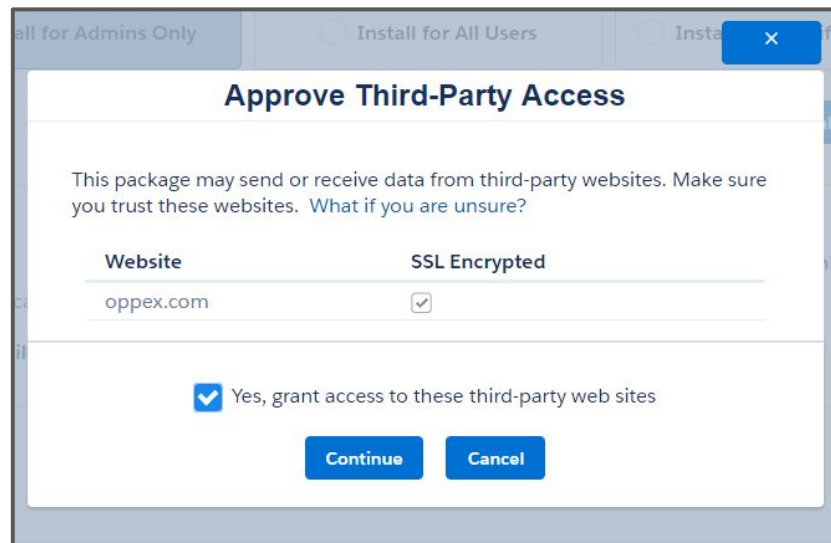
Please note, that permissions are required, but not sufficient to use the package. Please follow next steps to finish the setup process.



Step 3: Grant access to Oppex API

Package uses external Oppex API to search tenders and provide alerts.

It's necessary to grant access to API service in order to continue the installation.

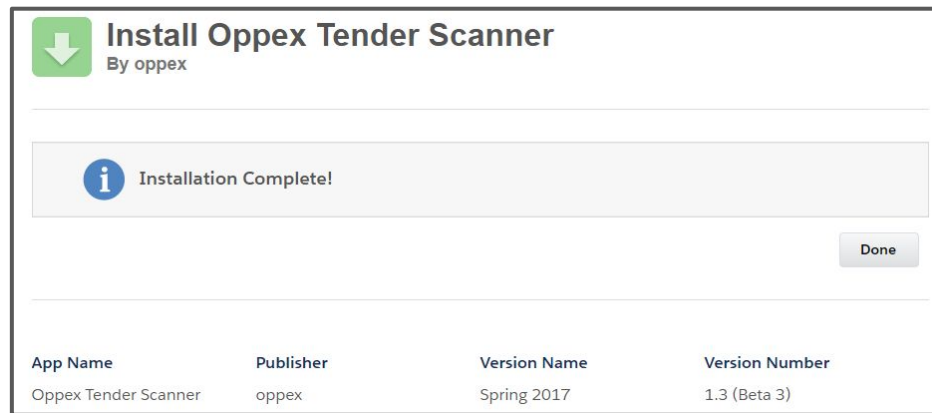


Step 4: Finish package installation

Package is installed now and almost ready to use.

It's necessary to perform post-installation configuration to start using the package:

- Assign Licenses;
- Assign Permission Set;
- Check additional permissions.



Step 5: Assign Licenses

It's necessary to assign package licenses (trial or purchased) to users you would like to be using the package.

Follow this steps to assign licenses:

- Go to “Setup”;
- Open “Installed Packages” configuration;
- Click ‘Manage Licenses’
- Select ‘Add Users’
- Select required users and press ‘Add’

The screenshots illustrate the following steps:

- Step 1:** The top navigation bar with icons for home, help, settings, notifications, and profile. A callout points to the settings icon.
- Step 2:** The search bar contains 'packa'. The 'Apps' dropdown is open, showing 'Installed Packages' and 'Package Manager'.
- Step 3:** The 'Installed Packages' table shows a row for 'Oppex Tender Scanner' by 'oppex'. A 'Manage Licenses' link is visible.
- Step 4:** The 'Uninstalled Packages' section is shown with 'Add Users' and 'Remove Multiple Users' buttons.
- Step 5:** The 'Available Users' list includes 'Team, Oppex' (selected), 'User, Integration', 'User, Security', and 'Vallée, Brice'.
- Step 6:** The 'Licensed Users' table shows 'Karpenkov, Nikita' and 'Team, Oppex' listed with 'Remove' links.

Step 6: Assign permission set to package users

It's necessary to assign "Oppex User" permission set to each user of the package within the Org.

Follow this steps to assign permission set:

1. Go to "Setup";
2. Open "Permission Sets" configuration;
3. Open "Oppex User" permission set;
4. Click on "Manage Assignments" button;
5. Select users and click "Assign".

1

2

3

4

5

Action	Permission Set Label
☐	Clone
☐	Oppex User

	Team, Oppex	oteam	salesforce@oppex.qa
☐	User, Integration	integ	integration@00d41000002ilmaeas.com
☐	User, Security	sec	insightssecurity@00d41000002ilmaeas.com
☐	Vallée, Brice	vall	brice.vallee@oppex.qa

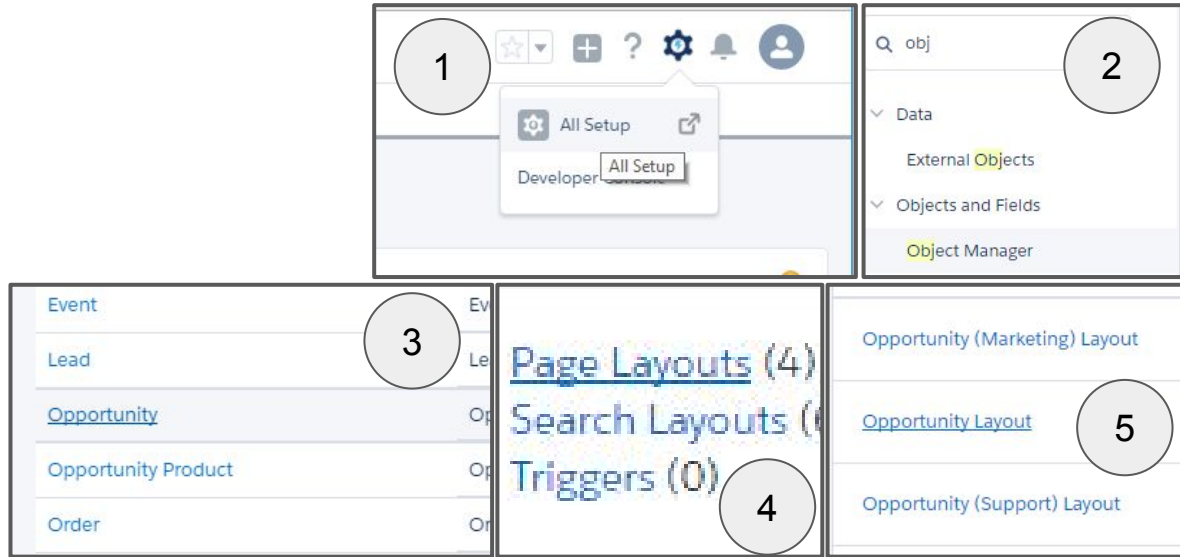
Assign Cancel

Step 7: Configure Opportunity layout

Update to Opportunity Layout is required to add Source link to details page.

To update Opportunity Layout:

1. Go to “Setup”;
2. Open “Object Manager”
3. Select “Opportunity”
4. Select “Page Layouts”
5. Select “Opportunity Layout”
6. Place required field through layout setup on the details page.



Congratulations!

Package is ready to use now.

Follow next steps to learn more:

- Enabling package access for additional profiles.
- Troubleshooting permission issues.

Enabling package access for additional profiles

Follow this step to enable package access for additional profiles (not selected on package installation at the step 2):

1. Go to “Setup”;
2. Open “Profiles” configuration;
3. Open the necessary profile;
4. Click on the “Edit” button;
5. Set “Tender Scanner” as visible;
6. Set “Tenders”, “Tender Scanner” and “Tender Filters” tabs as “Default On”;
7. Grant edit access to packaged custom Opportunity fields:
 - a. *Oppex Id*,
 - b. *Oppex Tender*,
 - c. *Original Source*,
 - d. *Original Source 2*,
 - e. *Source*;
8. Save.

Troubleshooting permission issues

Issue Description	Resolution
Conversion to Opportunity doesn't work.	Check Profile permissions: • Opportunity global access (create, edit); • Opportunity fields access (read, write): + Account Id + Name + Description + Amount + Stage Name + Close Date • Account access (read, create); • Account fields access (read, write): + Name