

Setting up the Umbel Salesforce App

The following are instructions for configuring the Umbel application for Salesforce.

NOTE: Before proceeding, you must have the following information:

- Property Slug
- OAuth token of a user with access to Personally Identifiable Information (PII) in Umbel

You must obtain these from your Umbel Client Partner.

1. Install the Umbel Application/Package

Select the users or group of users you would like the Umbel data views to be made available to. Then click **Install**.



Install Umbel
By Umbel Corp.



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Umbel	Umbel Corp.	1.2	1.2

Description

With the Umbel data management platform, leading sports, membership and entertainment organizations access, acquire, activate and analyze their customer data to increase engagement, revenue and loyalty.

Additional Details

[View Components](#)

NOTE: If you already have an instance of the Umbel application installed, click **Upgrade** to upgrade the version.

Once the install is complete, click **Done** to navigate to your Salesforce Admin page and view the installed package.

Once installed, the Umbel package will appear under the Installed Packages section of the Admin Setup page.



From the Package Components page, click on the **Umbel Settings** link.



From the Umbel Settings page, click the **New** button (located within the setup owner section).

Custom Setting

Umbel Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

EditDelete

▶ Default Organization Level Value

View: All Create New View

New

ActionSetup Owner ↑

View | Edit | DelStandard User

From the Edit Umbel Settings page, for Location, select **Profile**. Enter **Standard User**. Enter your Umbel **Property Slug** (you should get this value from your Umbel Client Partner).

Umbel Settings Edit

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

Edit Umbel Settings

SaveCancel

Umbel Settings Information

Location

Profile

Standard User

Property Slug

checker-sin

Click **Save**.

From the Umbel Settings page, click the **New** button (located above the Default Organization Level Value section) to add the property slug.

Custom Setting

Umbel Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All Create New View

Enter your **Property Slug** (this will be the same property slug entered in the previous step).

Umbel Settings Edit

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

Edit Umbel Settings

SaveCancel

Umbel Settings Information

Location

Property Slug

checker-sin

Click **Save**.

Your Umbel Settings should now look similar to this:

Custom Setting

Umbel Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit

Delete

▼ Default Organization Level Value

Location

Umbel, LLC

Property Slug

checker-sin

View:

All

Create New View

New

Action	Setup Owner	Location
View Edit Del	Standard User	Profile

3. Create a New Named Credential.

From the Admin Quick Find (in the left navigation bar), type *Named Credential* in order to locate and access the Named Credential Admin page.

Named Credential

Expand All | Collapse All

Administer

Security Controls

Named Credentials

Custom Setting

Umbel Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the coun

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending

Edit

Delete

▼ Default Organization Level Value

Location

Umbel, LLC

View:

All

Create New View

New

Action	Setup Owner	Location
View Edit Del	Standard User	Profile

From the Named Credentials Admin page, click the **New Named Credential** button.

Named Credentials

A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid setting authentication parameters for each callout by referencing named credentials.

View:

All

Create New View

New Named Credential

Fill out the Named Credential information as follows:

Label: Umbel API

Name: *This will automatically generate (should read Umbel_API)*

URL: https://api.umbel.com

Certificate: *Leave blank*

Identity Type: Select Named Principal

Authentication Protocol: Select Password Authentication

Username: *You can type anything here, but it can't be blank. Sample: anything*

Password: *This must be the OAuth token of a user with PII access. You must get this from your Umbel Client Partner.*

Generate Authorization Header: De-select

Allow Merge Fields in HTTP Header: Select

Allow Merge Fields in HTTP Body: De-select

Named Credential Edit: Umbel API

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

SaveCancel

Label ⓘ Umbel API

Name ⓘ Umbel_API

URL https://api.umbel.com/

▼ Authentication

Certificate 

Identity Type Named Principal ⓘ

Authentication Protocol Password Authentication ⓘ

Username anystring

Password

▼ Callout Options

Generate Authorization Header ⓘ ☐

Allow Merge Fields in HTTP Header ⓘ ☒

Allow Merge Fields in HTTP Body ⓘ ☐

SaveCancel

Click **Save**.

4. Add the VisualForce Components

For either the Contact Record, Lead Record or both, search for the Page Layouts configuration page within the Build → Customize Admin menu.

Lead

Expand All | Collapse All

Administer

Data.com Administration

Clean

Clean Info

Lead Fields

Build

Customize

Leads

Fields

Related Lookup Filters

Validation Rules

Triggers

[Page Layouts](#)

Field Sets

Compact Layouts

Search Layouts

Lead Assignment Rules

Select the Layout you would like to modify and add the Umbel data to and click **Edit**.

Lead Page Layout

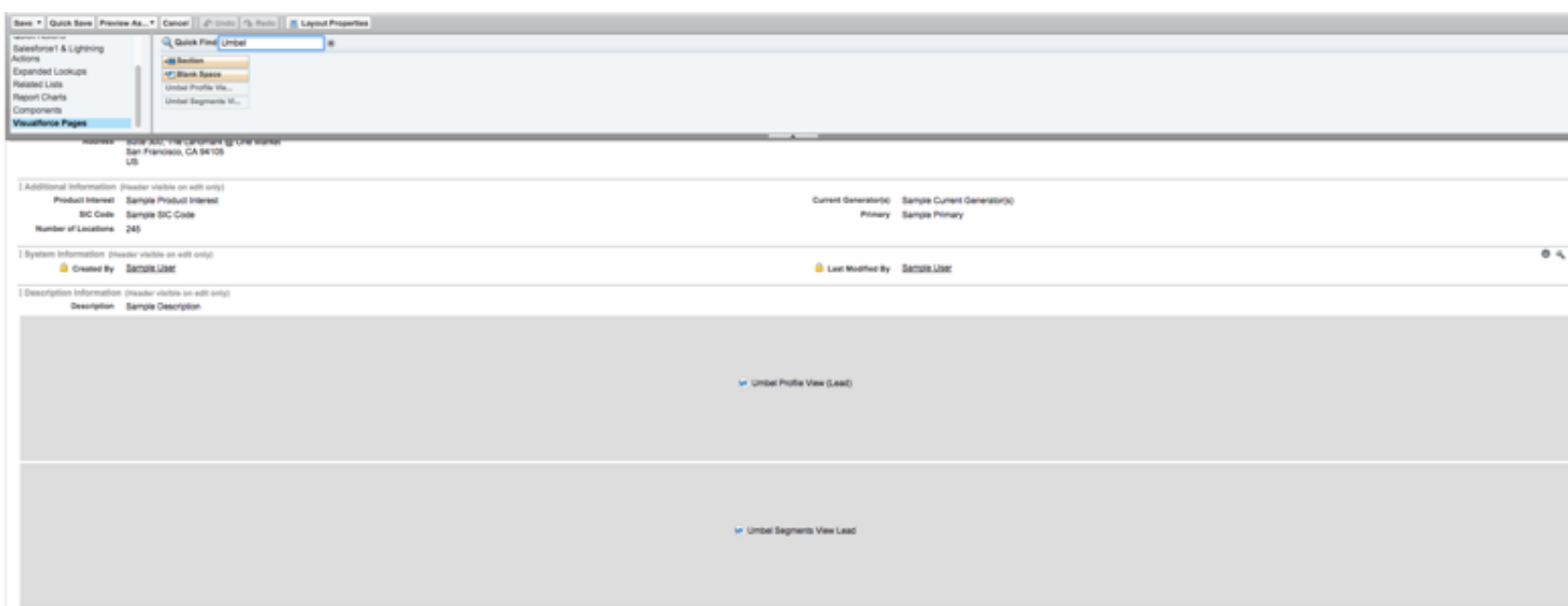
This page allows you to create different page layouts to display Lead data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Lead Page Layouts			New
Action	Page Layout Name	Created By	
Edit Del	Lead (Marketing) Layout	Krystal Stewart , 1/13/2017 11:45	
Edit Del	Lead (Sales) Layout	Krystal Stewart , 1/13/2017 11:45	
Edit Del	Lead (Support) Layout	Krystal Stewart , 1/13/2017 11:45	
Edit Del	Lead Layout	Krystal Stewart , 1/13/2017 11:45	

From the Layout option menu, select the **VisualForce Pages** option to narrow down the sections available (or look for Umbel in the Quick Find).



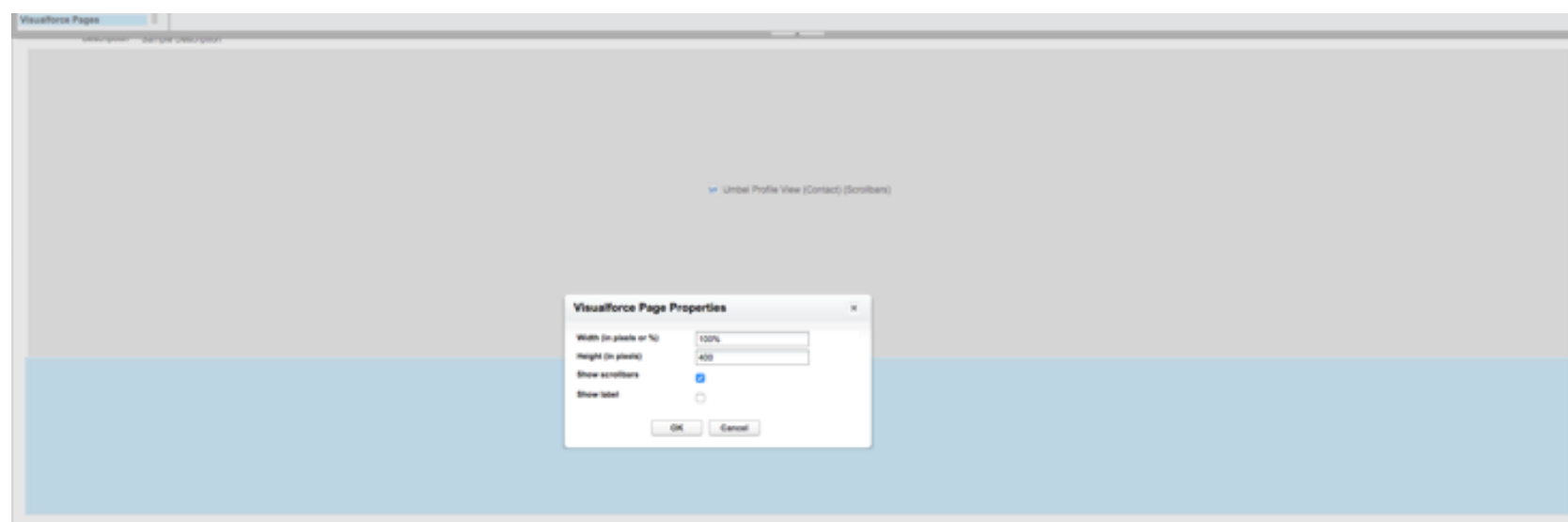
Drag and drop the Umbel-related sections onto the layout of the contact or lead records.



We recommend editing the Visualforce Page Properties by clicking on the wrench icon located in the top right of the Visualforce block.



You can enable the scroll bars and expand the section to show more information within the Umbel views.



Click **Save** to save your changes.

You should now be able to see the Umbel data on the Contact or Lead record.

Lead Detail

Lead Owner

Kyle Stewer

Stewer, Kyle

Name

Ms Kristen Allen

Company

Aethra Home Products

Title

Director, Warehouse Mgmt

Lead Source

Partner Referral

Industry

Annual Revenue

Address

VA, USA

Product Interest

GC5000 series

BC Code

2788

Number of Locations

130

Created By

Kyle Stewer

Description

Phone

Mobile

Fax

Email

Website

Lead Status

Working - Contacted

Rating

No. of Employees

Current Generation(s)

All

Primary

Yes

Last Modified By

Kyle Stewer

1/13/2017 3:21 PM

Umbel Data

First Name

Kenny

Last Name

Phone Number

Gender

male

Age

Ethnicity

Marital Status

married

Brand

Automobiles and Parts

BMW Car Club of America

Products & Services

Facebook, TVs, Advantage, Facebook for Developers, Ticketmaster, Skype, Chase Freedom, AXE, TheFind, ShopRunner, Bob-Lubley Lee Blog, Steiner Sports, Medicare Trade Clear, Facebook + Commerce, Striv, Babcock Ranch, Rebecca Brodskien Photography

Unregistered

Louis Vuitton, Gucci, Walgreens, Ford Motor Company, CVS Pharmacy, Website, Kaplow, Resource Real Estate, Inc., Rite Aid, Patex Philippe, Jessica Simpson Collection

Bank/Financial Service

Chase

Website

TED, LinkedIn, eRline, Pop Culture Now, Facebook Media, LIVESTRONG.COM, Climate Reality, ToYuu, GetGameSmart.com, Cliff Lee Signs with the Philadelphia Phillies: Get Over It, New York

Edit

Delete

Convert

Clone

Find Duplicates