

| an OSF Product

OSF
BTRACKING

Integrator for Salesforce

OSF INTEGRATOR for BTRACKING and SALESFORCE

Installation Guide

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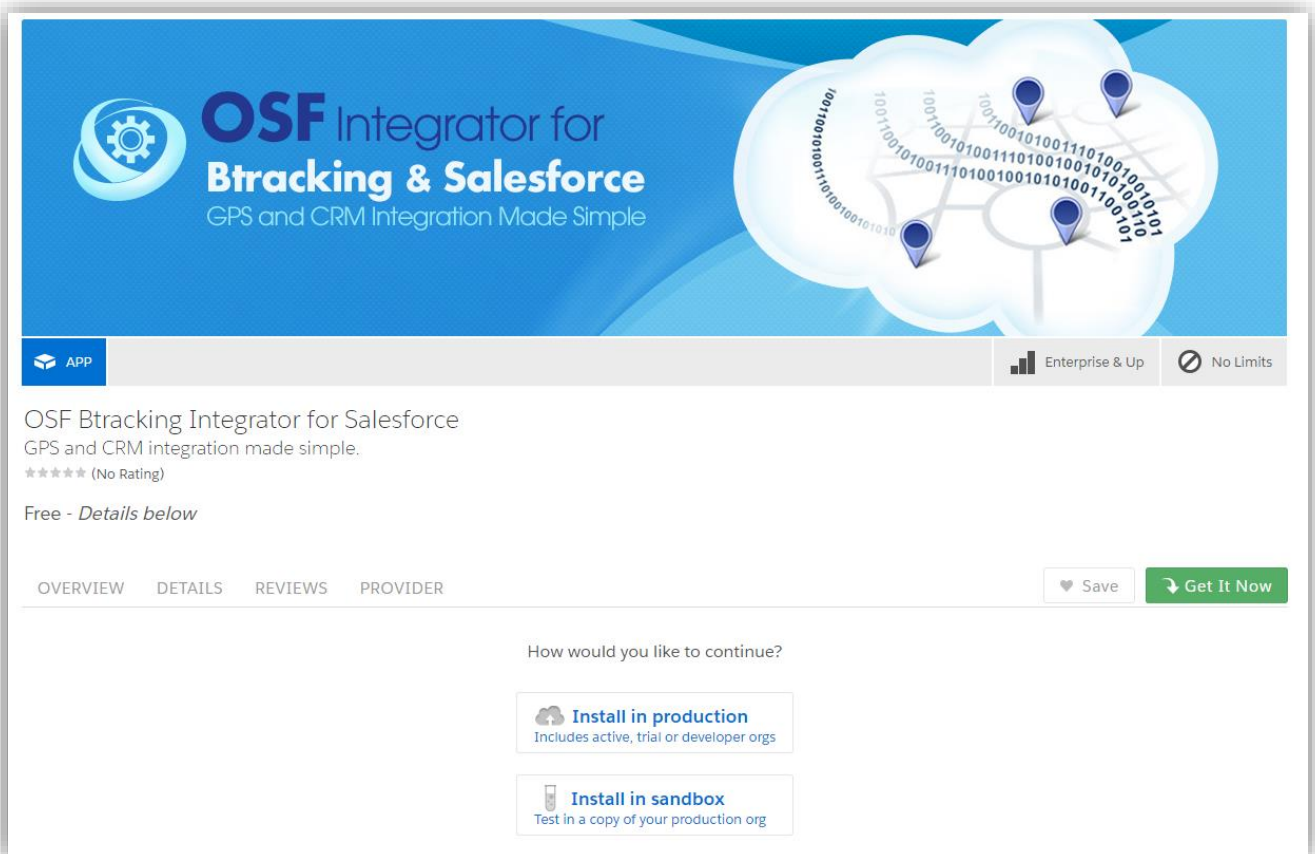
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1 Package Installation

- To install the application you have to be logged in as an administrator in Salesforce.com.
- The application can be installed in Enterprise, Unlimited, Force.com, Developer or Performance edition.
- You must have a Btracking trial or paying account and must have the login information for that account. If you don't have a trial account, please visit Btracking.com website.

2 Install the Application

- To get OSF Integrator for BTRACKING and Salesforce, please follow this link:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B30xrEAB>
- After clicking the "Get it now" button from the AppExchange page and entering your Salesforce credentials, select where you want to install the application, either in production or sandbox.



1. To start the installation select "I have read and agree to the terms & conditions." and click "Confirm and Install!".

OSF Btracking Integrator for Salesforce

GPS and CRM integration made simple.

★★★★★ (No Rating)

Free - Details below

OVERVIEW DETAILS REVIEWS PROVIDER

Save

Get It Now

Almost there!

Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE

OSF Btracking Integrator for Salesforce

VERSION

OSF Integrator for Btracking and Salesforce (February 2013 / 1.104.0)

SUBSCRIPTION

Free

DURATION

Does Not Expire

NUMBER OF SUBSCRIBERS

Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION

Self

EDITION

Developer

USER NAME

sue.henning@self.com

☐ I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

2. Select „Install for all Users” and click „Install”.



Install OSF Integrator for Btracking and Salesforce

By OSF Global Services (Partner Main)



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name

OSF Integrator for Btracking and Salesforce

Publisher

OSF Global Services (Partner Main)

Version Name

February 2013

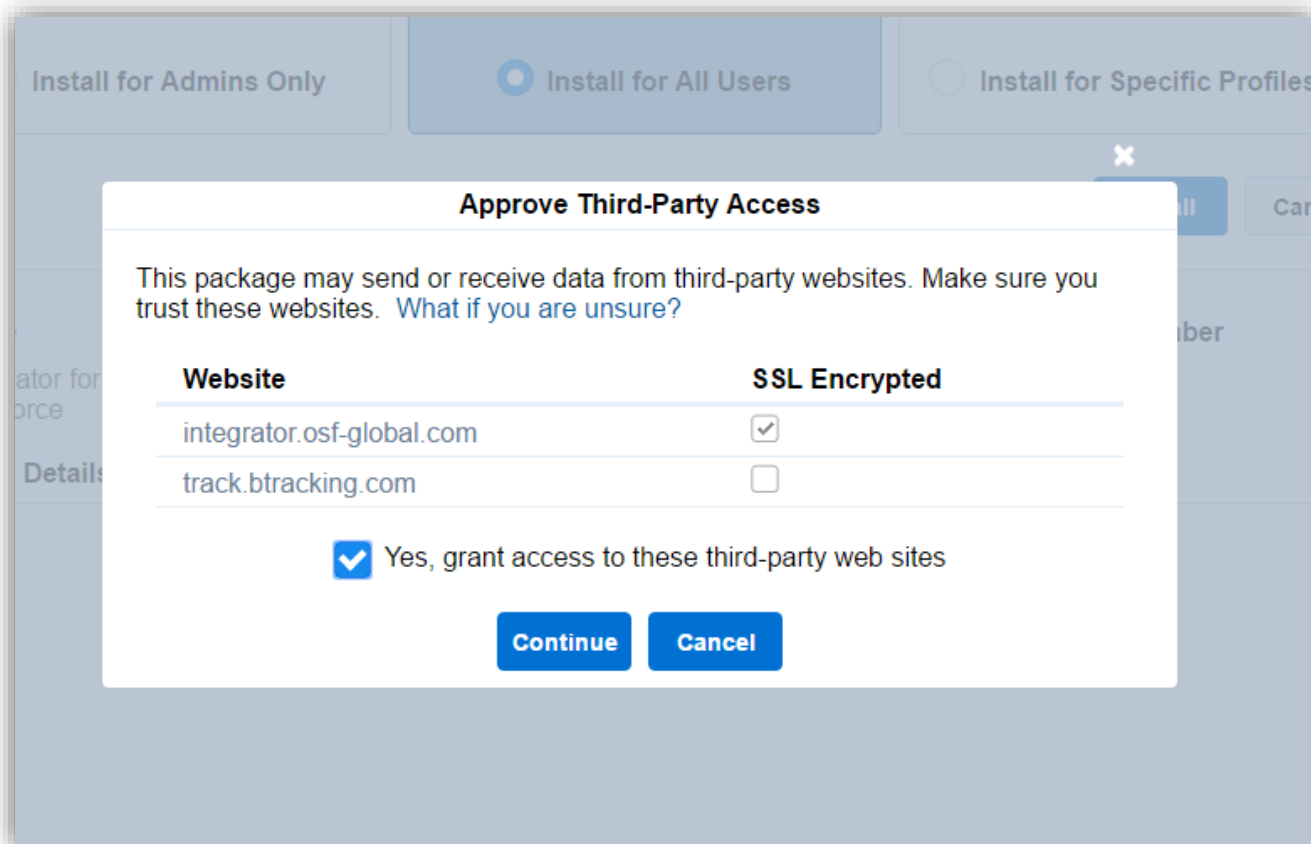
Version Number

1.104

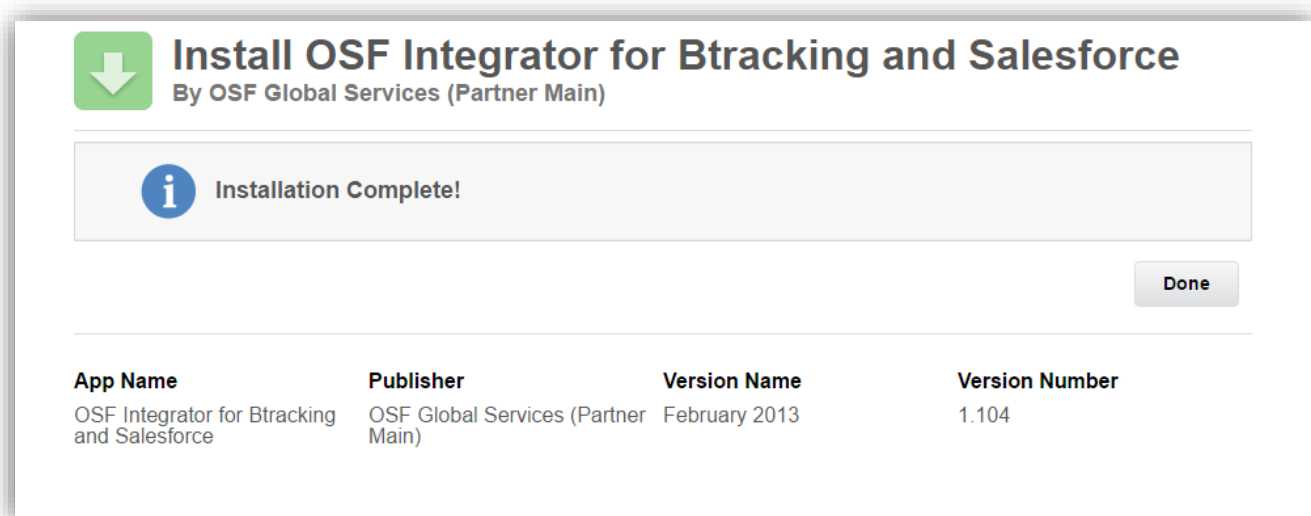
Additional Details

[View Components](#) [API Access](#)

3. On the Approve Third-Party Access window, check „Yes, grant access to these third-party web sites” and click „Continue”.

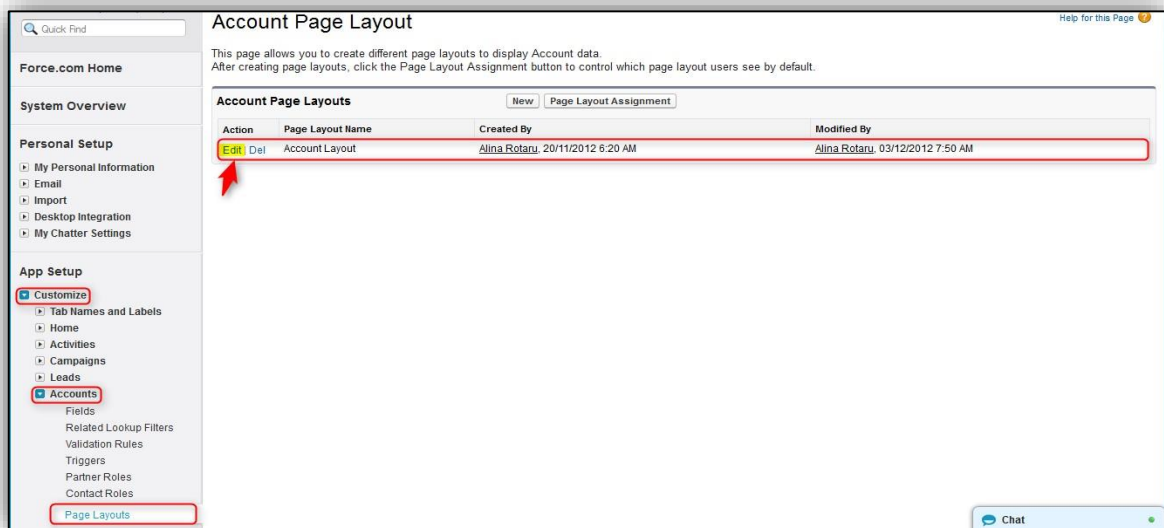


4. After the installation is complete, click "Done".

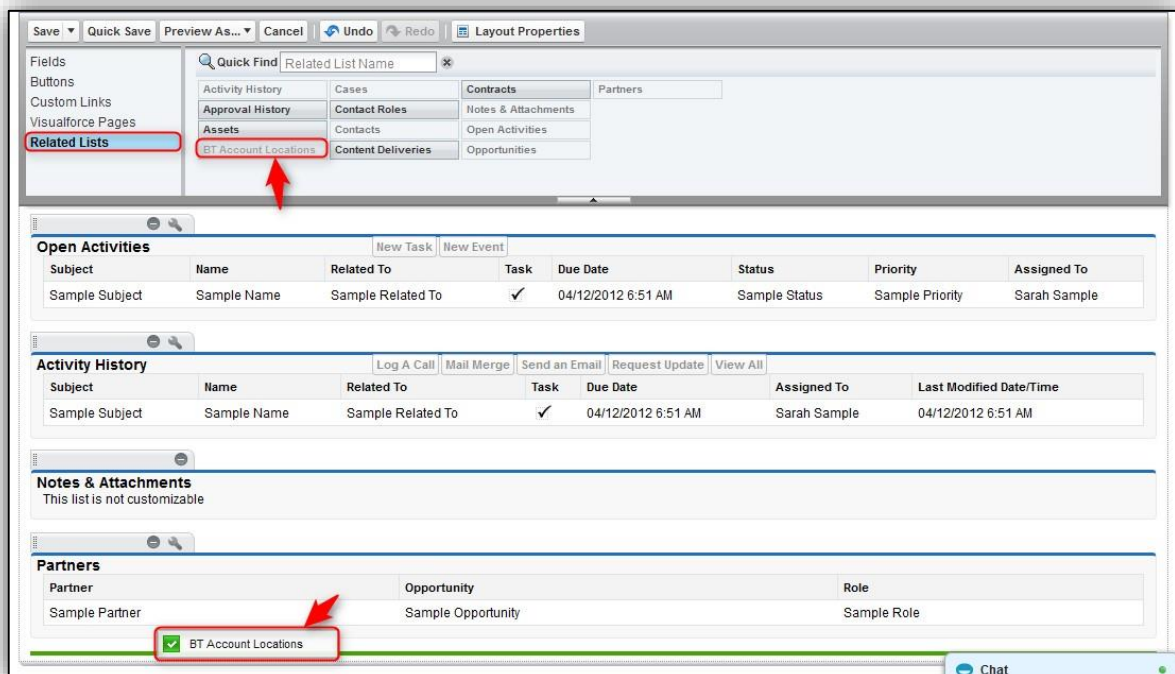


2.1 Page Layout Customization

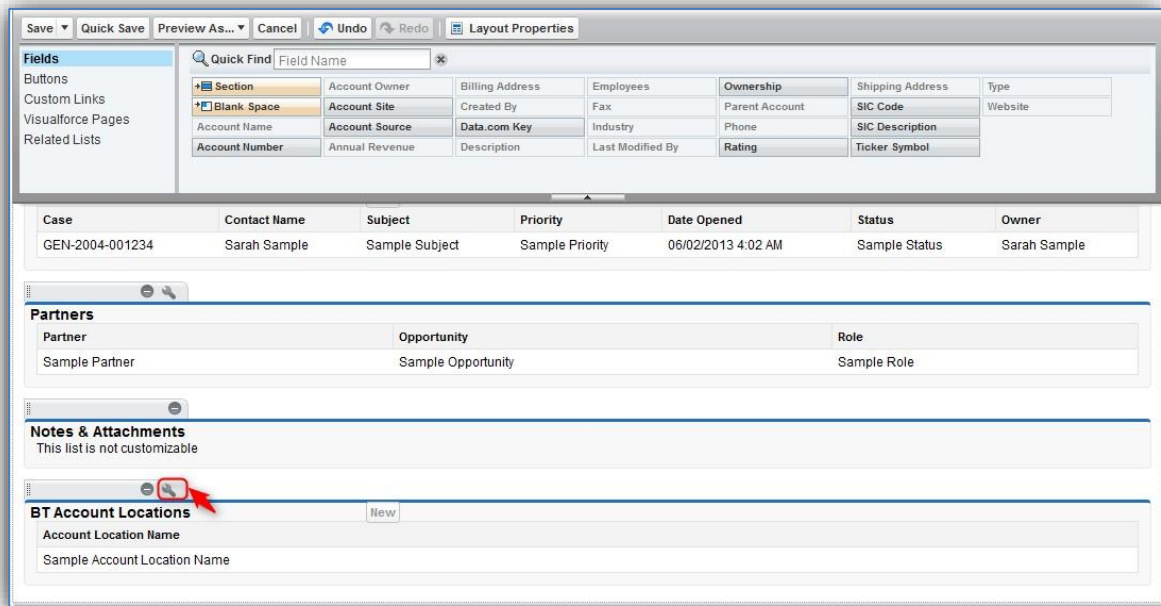
1. To customize the account's page layout click <YourName> -> Setup -> App Setup -> Customize -> Accounts -> Page Layouts and click "Edit" on the Account Layout.



2. Click "Related Lists" and then drag and drop on the page layout the „BT Account Locations“ related list.

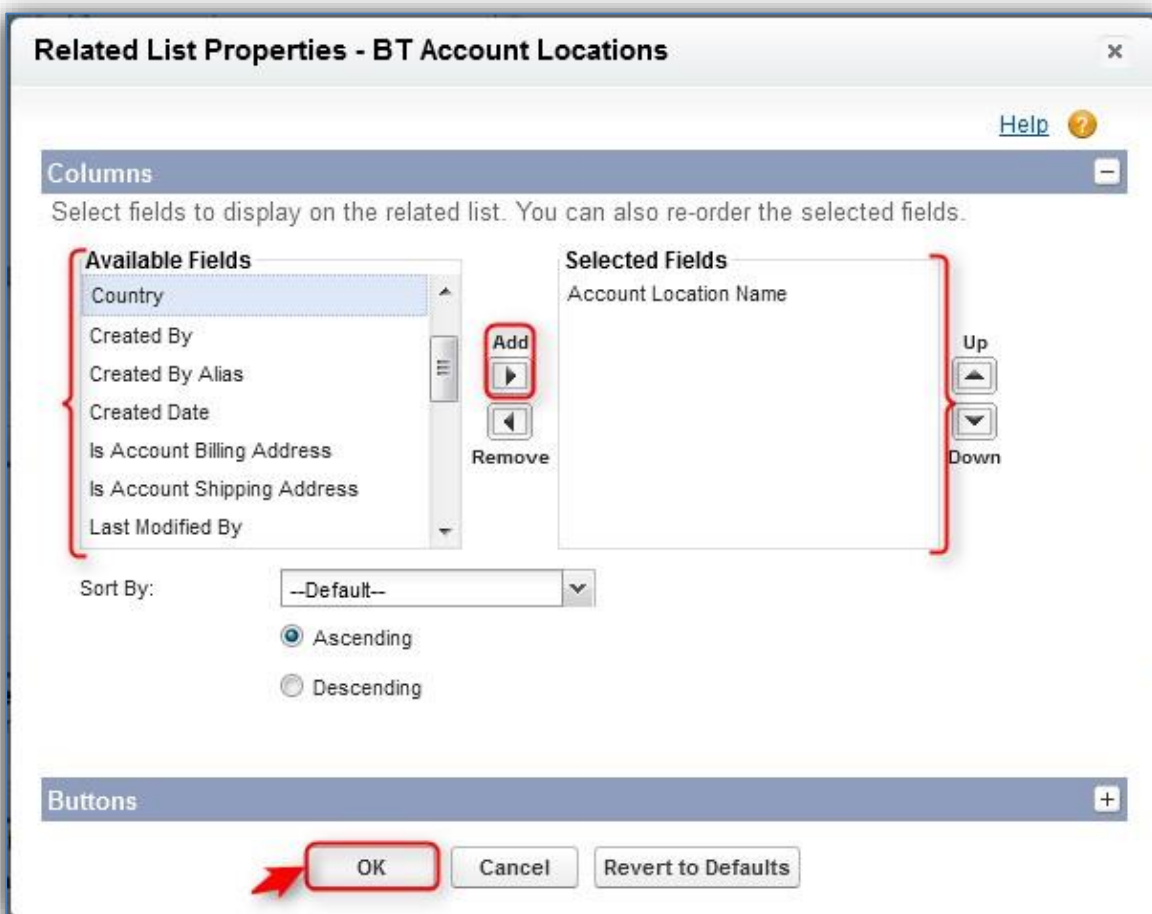


3. After adding the „BT Account Location“ related list, in order to add other fields to see the location's details.



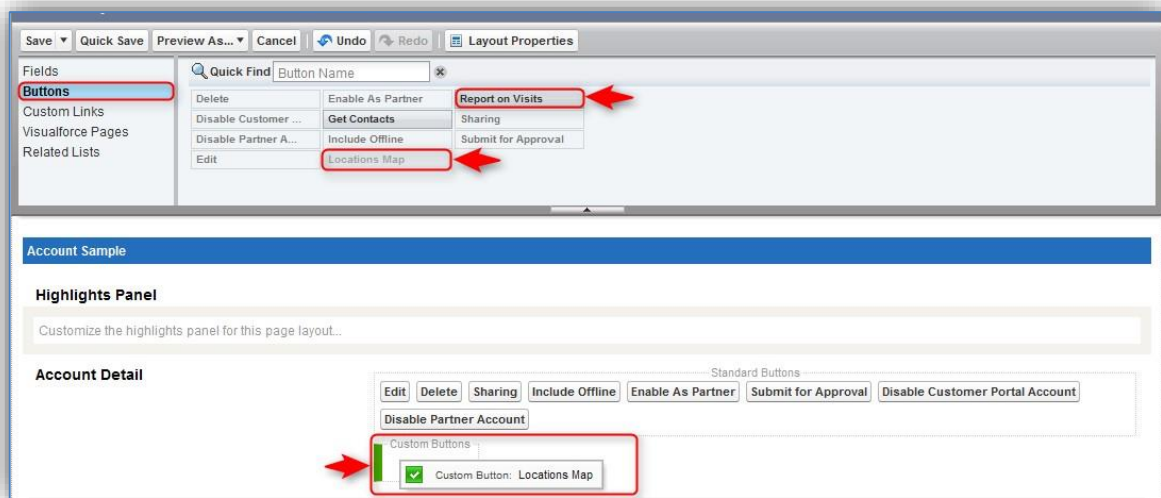
The screenshot shows the OSF Commerce interface. At the top, there's a navigation bar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Fields' section with a 'Quick Find' field and a table of fields. The table has columns: Section, Account Owner, Billing Address, Employees, Ownership, Shipping Address, and Type. The rows are: Section (Account Site, Account Source, Data.com Key, Industry, Parent Account, Phone, SIC Code, SIC Description, Ticker Symbol), Blank Space (Account Name, Annual Revenue, Description, Last Modified By, Rating), and Account Number (Account Number, Annual Revenue, Description, Last Modified By, Rating). Below the fields section is a 'Partners' section with a table of Partner, Opportunity, and Role. Below that is a 'Notes & Attachments' section. At the bottom is the 'BT Account Locations' section, which is highlighted with a red arrow. It contains a 'New' button and a table with 'Account Location Name' and 'Sample Account Location Name'.

4. In the new opened window you can select the fields that you want to be displayed for the Account's locations. You can add the Latitude, Longitude, Street, City and Country fields. After selecting all the necessary fields click „OK“.

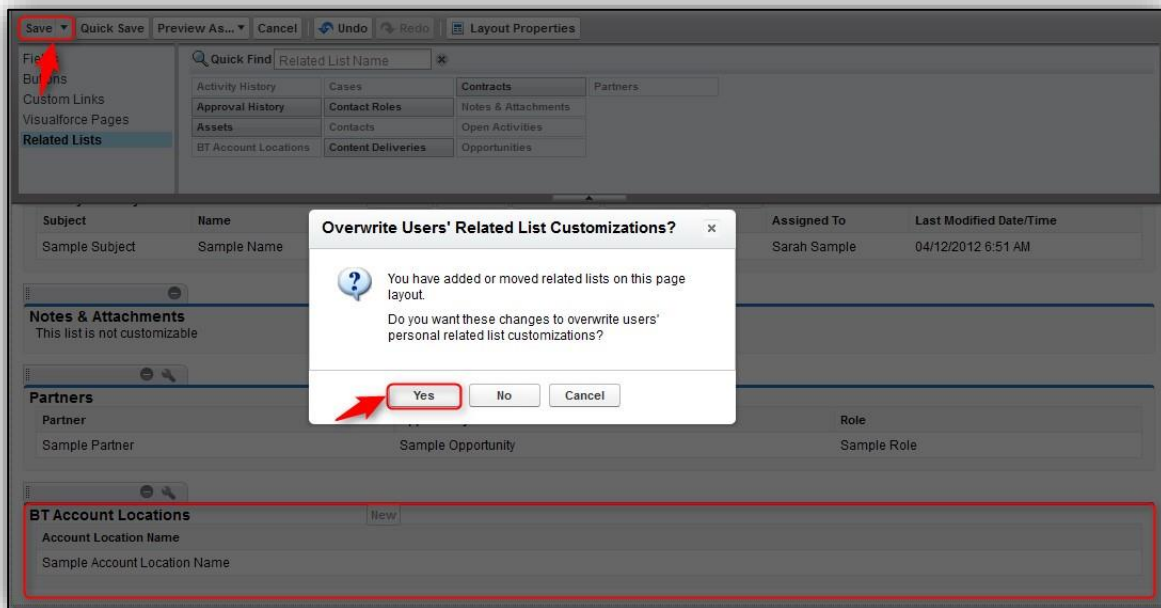


The screenshot shows the 'Related List Properties - BT Account Locations' dialog box. It has a 'Columns' section with a 'Help' button. Below this is a text box: 'Select fields to display on the related list. You can also re-order the selected fields.' The 'Available Fields' list includes: Country, Created By, Created By Alias, Created Date, Is Account Billing Address, Is Account Shipping Address, and Last Modified By. The 'Selected Fields' list includes: Account Location Name. There are 'Add' and 'Remove' buttons between the lists. The 'Sort By' dropdown is set to '--Default--'. Below this are radio buttons for 'Ascending' and 'Descending'. At the bottom is a 'Buttons' section with 'OK', 'Cancel', and 'Revert to Defaults' buttons. A red arrow points to the 'OK' button.

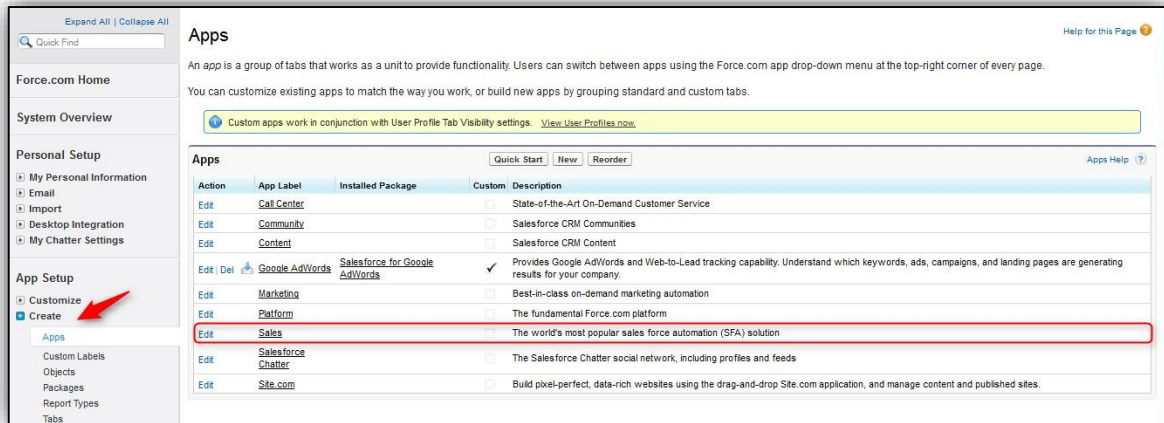
- To add the „Report on Visits“ and “Locations Map” buttons click „Buttons“ and then drag and drop the buttons in the Custom Button section.



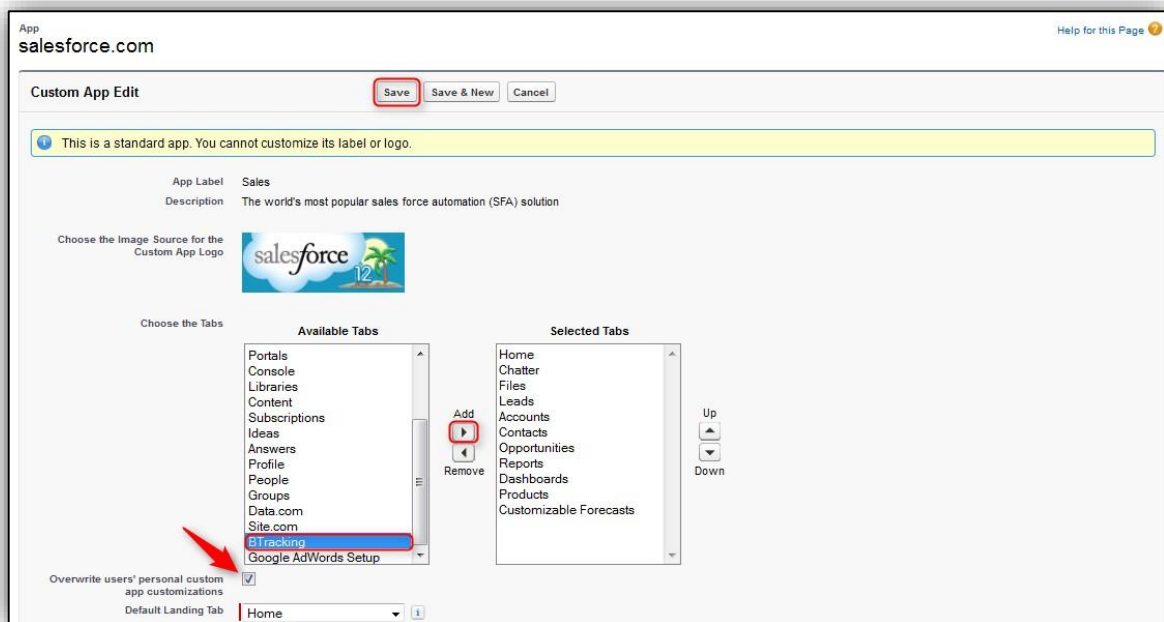
- After you have added the „BT Account Locations“ related list and the „Report on Visits“ and “Locations Map” buttons, you can click „Save“ and „Yes“ to save the page layout and apply the changes.



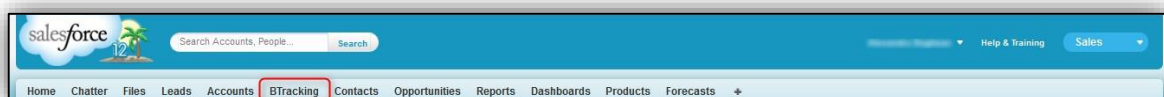
- Go to <YourName> -> Setup -> App Setup -> Create -> Apps and click “Edit” from the Sales.



8. Select "Btracking" from the Available Tabs, click "Add", select "Overwrite users personal custom app customizations" and click "Save"



9. Now you can see the Btracking tab in the upper menu.



10. Click the Btracking tab to set up your account settings and have access to the OSF Integrator functionalities. A page like the one below will appear. You must fill in the Btracking settings fields with your own Btracking credentials and click "Save".
11. In the **Name** field enter the name you use when logging into Btracking.

15. After receiving the e-mail with the OSF Global Services Security Token, insert it in the related field, click "Save" and then refresh the page. A success message will appear and you can use the Free Version of the application that allows you to add 2 Btracking users and geocode 100 account locations.

Go Pro and you will have to pay a setup fee of \$100. Once we will receive the payment confirmation we will unlock the limitations and you will be able to enjoy all of the features of the application. Once you will go Pro at the end of each month OSF Global Services is going to issue an invoice which will be sent via email. The invoice will be calculated based on the number of bTracking users defined in Salesforce for which we will find a match. The price for this is \$6/month/bTracking user for which we had visits.' At the bottom, it says: 'In case you already went Pro and don't have access to all the unlocked features please click on this button: [Check license info](#) and we will perform a check and unlock the Pro features.' Red arrows point to the 'Go Pro' link and the 'Check license info' button." data-bbox="141 195 854 580"/>

16. To use the Standard Version of the application, thus, to add more than 2 Btracking users and geocode more than 100 account locations click the "Go Pro" sub-tab from the "Btracking" tab.
17. Click the "Go Pro" link to pay the setup fee and use the Standard Version of the OSF Integrator for BTRACKING and Salesforce. After completing the payment you will receive by mail the confirmation of the payment and you can start using it.
18. In case you already have the Standard Version and don't have access to all the unlocked features please click the "Check License Info" button and we will perform a check and unlock the Standard features.

In order to use the OSF Integrator for BTRACKING and Salesforce, please follow the steps described in the OSF Integrator for BTRACKING and Salesforce User Guide.

Should you have any questions, contact us at info@osf-commerce.com. Remember, the Free Version allows you to use up to two Btracking users and 100 account locations geocoded. If you are interested in upgrading to the Standard Version of the product, simply select the "Go Pro" button on the application within Salesforce.