



Installation Manual

portatour® for Salesforce®

Last updated on 1/11/2018

Based on version 2013-12-09 BETA

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www.portatour.com

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1. Preface

portatour® for Salesforce is a personal route planner for your sales reps.

This manual describes the installation of *portatour*® from the Salesforce AppExchange. A full **Administrator Manual** is part of the package, guiding through all installation and configuration steps.

2. Installation

2.1 System requirements

portatour® for Salesforce® is available for following platforms:

- Sales Cloud: Professional, Enterprise and Unlimited Edition
- Force.com Cloud Platform
- Force.com Developer Edition

portatour® does not work with the Contact Manager- and Group Edition of the Sales Cloud.

2.2 Start installation

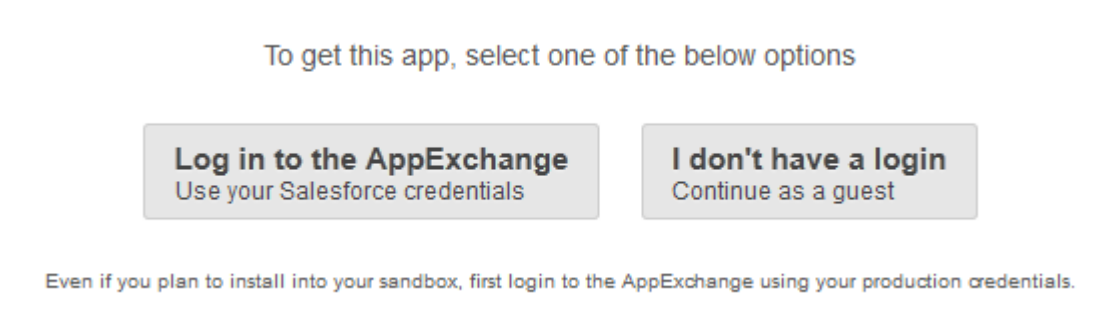
You can get *portatour*® for Salesforce® through the Salesforce AppExchange. Search for "portatour" or use following link:

<https://www.portatour.com/salesforce/download>

Select **Get It Now**:



Log in:



Choose whether you want to install *portatour*® in production or in sandbox:

How would you like to continue?



Install in production

Includes active, trial or developer orgs



Install in sandbox

Test in a copy of your production org

Log in to your Salesforce Organization. Then, carefully read the *portatour*® terms and conditions.

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

portatour® – my personal sales -route planner

VERSION

portatour® (2015-02-13 BETA P2 /1.142.2)

SUBSCRIPTION

Free

DURATION

Does Not Expire

NUMBER OF SUBSCRIBERS

Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION

EDITION

USER NAME



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

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

Confirm and Install!

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Start the installation by pressing **Confirm and Install**.

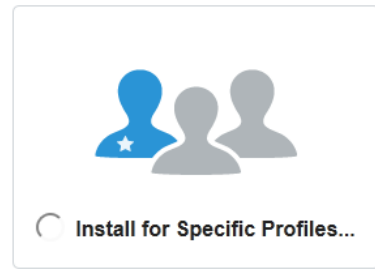
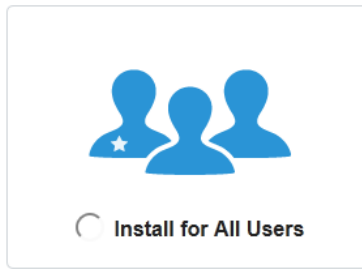
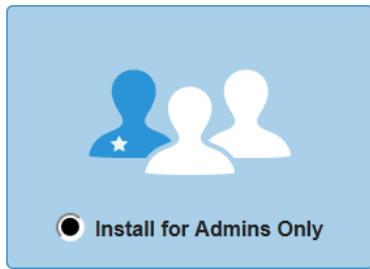
2.3 Initial permissions

After you logged in to the Salesforce Organization in which *portatour*® will be installed, a selection is shown. These are initial permissions - leave the setting **Install for Admins only** and click on **Install**.



Install portatour® – my personal sales-route planner

By impactit GmbH



Install Cancel

App Name	Publisher	Version Name	Version Number
portatour® – my personal sales-route planner	impactit GmbH	2015-02-13 BETA P2	1.142.2

Description

More customer calls - fewer miles! Automatic call scheduling with route optimization for field reps. Seamlessly integrated with Salesforce. Including full-featured mobile client, customizable call reporting, performance analysis, and maps. Free trial!

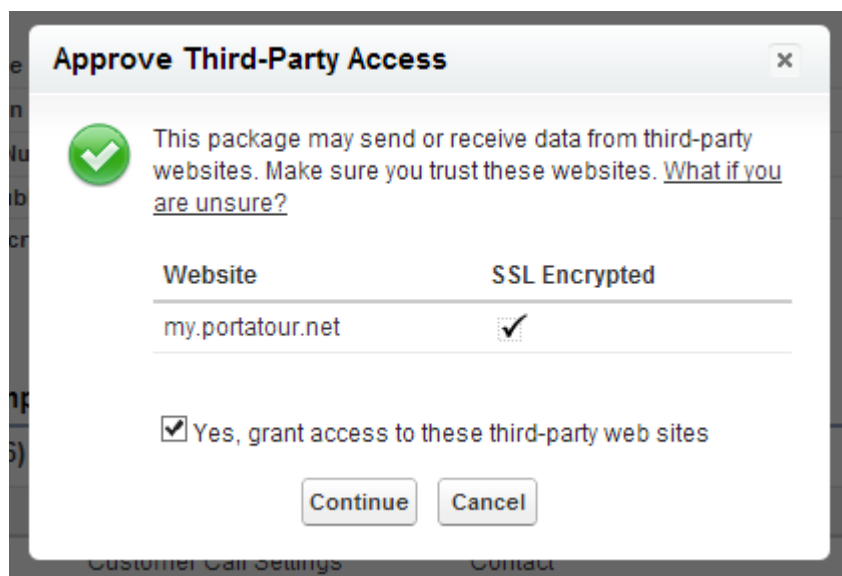
Additional Details [View Components](#) [API Access](#)

Hint: In a Professional Edition Organization there is only one option available: **Install for All Users**.

Hint: *portatour*® uses it's own permission system based on Permission Sets. After the installation you will decide which users are going to be activated for *portatour*®.

portatour® for Salesforce® communicates with the *portatour*® Server Farm which is responsible for computing the routes. It is important to approve this connection. The communication between Salesforce and *portatour*® is encrypted with SSL.

Confirm the checkbox **Yes, grant access to these third-party web sites** and press **Continue**:



The installation process usually takes a couple of minutes. You will be notified via email once the installation is completed. Proceed afterwards.



Install portatour® – my personal sales-route planner

By impactit GmbH



This app is taking a long time to install.

You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
portatour® – my personal sales-route planner	impactit GmbH	2015-02-13 BETA P2	1.142.2

Description

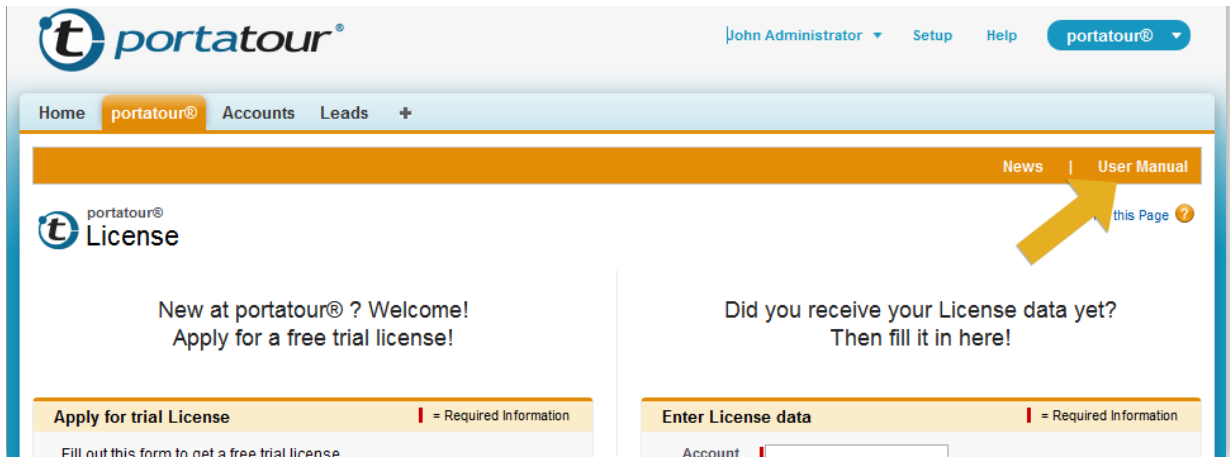
More customer calls - fewer miles! Automatic call scheduling with route optimization for field reps. Seamlessly integrated with Salesforce. Including full-featured mobile client, customizable call reporting, performance analysis, and maps. Free trial!

3. Configuration

Once *portatour*® is installed within your Organization, continue with configuration as described in the *portatour*® for Salesforce Administrator Manual contained within the package.

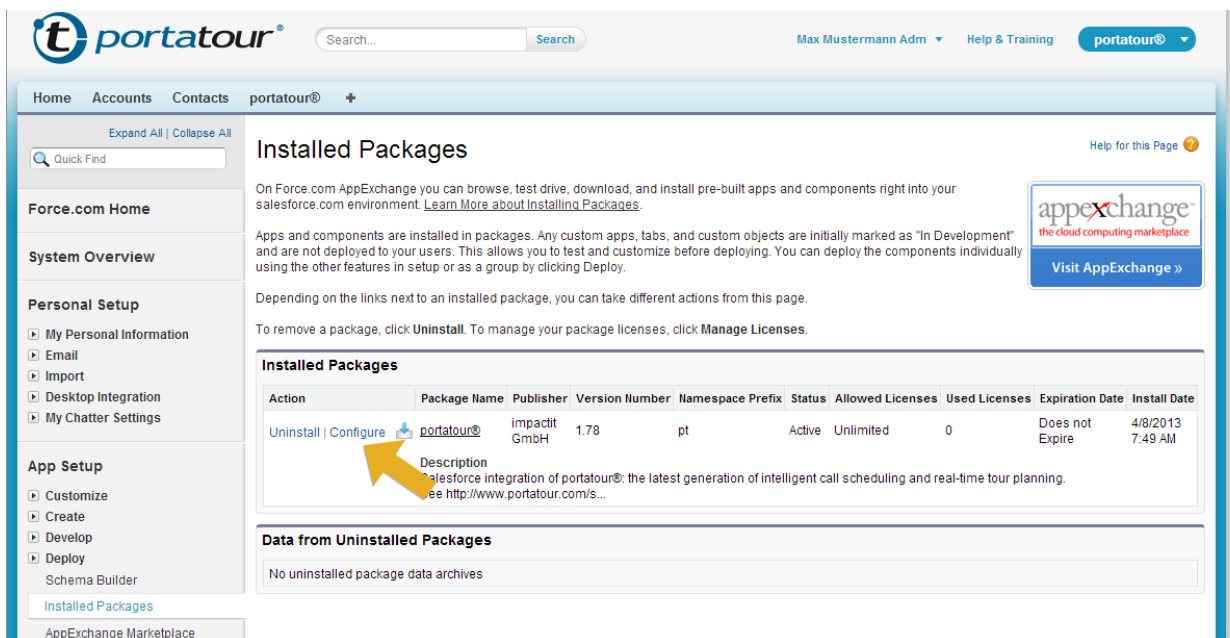
There are two ways to open the manual:

On the **License** page, click the **User's Manual** Button.



and choose the Administrator Manual in English.

Alternatively, open **Setup/App Setup/Installed Packages** and click **Configure** at the installed *portatour*® package.



4. Support

The *portatour*® Support Team can be contacted via the email address support@portatour.net. Please send support requests in English or German.

4.1 Supportmail

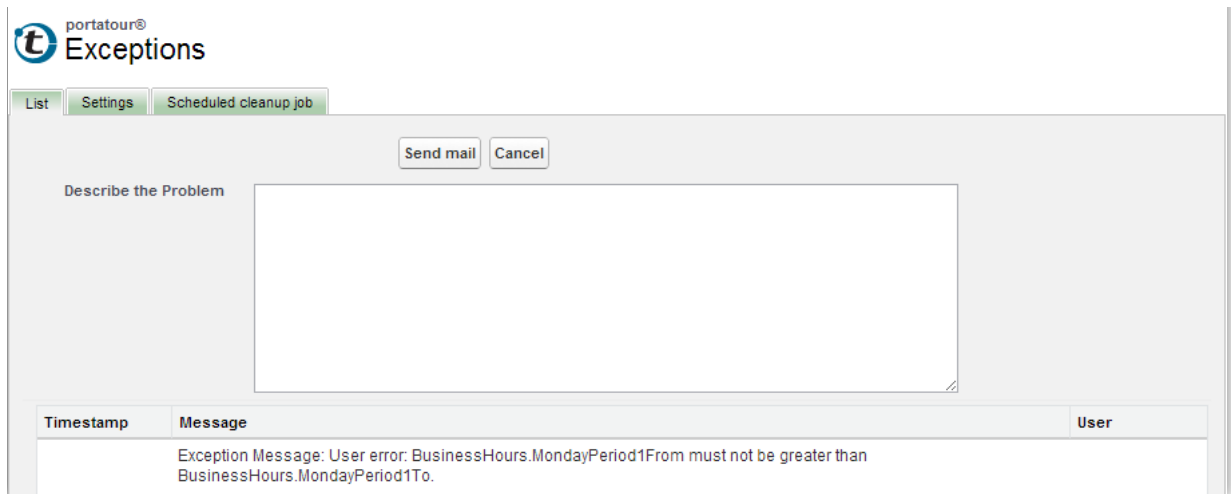
In case an unexpected error occurs during the use of *portatour*®, the user will be notified through an Exception message which will be logged, if possible. The logged Exceptions can be forwarded to the *portatour*® Support via email.

Open the *portatour*® tab and select **Options/Exceptions**.

Look for Exceptions related to the error by adjusting filter criteria. High-light these Exceptions and select **Email Selected to Support**.

A page appears with a text field to describe the problem. Add the following information to ease analysis and troubleshooting:

- What did the user intend to do?
- What happened? (Error message / unexpected event)
- What exact steps were performed? (Navigation steps in *portatour*®)
- What data is affected?
- How can the error be reproduced?



Timestamp	Message	User
	Exception Message: User error: BusinessHours.MondayPeriod1From must not be greater than BusinessHours.MondayPeriod1To.	

Select **Send mail** in order to email the problem description and selected Exceptions to the *portatour*® Support.

4.2 Grant Login Access

For advanced support, it can be needed that the *portatour*® Support Team investigates the problem on the spot. In this case, the *portatour*® Support Team may ask you to grant Login Access to your Account. When prompted, select **Setup/Personal Setup/My Personal Information/Grant Login Access**:

Grant Login Access

[Help for this Page](#) ?

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: testnaee@impactit.at

Grant Access To	Access Duration
Your Company's Administrator	328 day(s) left. Expires on 2/12/2014. Change
Salesforce.com Support	--No Access--
impactit GmbH Support 	--No Access--

Save

C

--No Access--

1 Day (exp. 3/22/2013)

3 Days (exp. 3/24/2013)

1 Week (exp. 3/28/2013)

1 Month (exp. 4/21/2013)

Grant Access to **impactit GmbH-Support** and confirm with **Save**.

Hint: Only Administrators can grant access to the *portatour*® Support Team.

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