

LeadGenVideo is an extension package, so the very first step is to install and configure NativeVideo.

1. Install and Configure NativeVideo

Pre-Installation Steps

Please validate all the following items:

1. Make sure that the Salesforce Communities are enabled. From the “Communities Settings” section in the Setup panel, tick the “Enable Community Workspaces” option, and follow through the Salesforce configuration steps.
2. Check that the email deliverability is set to all. In the Salesforce Setup panel, navigate to the “Deliverability” page and make sure that the “Access Level” picklist is set to “All email”
3. Salesforce Lightning has been enabled in the Org, with a custom domain deployed to all users
4. Chatter has been enabled in the Org: in the Setup panel, navigate to the “Chatter Settings” page and verify that the “Enable” checkbox has been ticked.

Package Installation

Login to the target Org and install through this relative URL:
</packaging/installPackage.apexp?p0=04t0O000000Q7Yp>

Post-Installation Steps

Once the package has been installed, please follow these manual steps:

1. In the setup panel, look for the “Sites” page and click on the “New” button. In the new site form page, specify the following values:
 - a. Site Label: NativeVideo Public Site
 - b. Site Name: NativeVideo_Public_Site
 - c. Site Description: Public site to access NativeVideo contents: Web-hooks to get updates on the video, e.g. audio, transcriptions, streams readiness. Thumbnails
 - d. Default Web Address: nativevideo
 - e. Active: true
 - f. Active Site Homepage: VideoWebHook
2. From the details page of the newly created site, click on the "Public Site Settings" button and then on the "Assigned Users" button to see the list of users. Click on the "Site Guest User, NativeVideo Public Site" user and add the following permission sets:
 - a. "NativeVideo Permissions"

- b. "NativeVideo Public Site User Permissions"
3. Please note somewhere the base home URL of the site. Navigate to the details page of the newly created site and click on the "View" link on the "Custom URLs" section. The link has to be in the HTTPs protocol and without the slash at the end, like for instance "https://nativevideo-edition.eu9.force.com/nativevideo"
4. Create a Public Group
 - a. Label: NativeVideo Public Group Users
 - b. Group Name: NativeVideo_Public_Group_Users
 - c. Add User: Search "Users" for: NativeVideo → Add "User: NativeVideo Public Site Site Guest User"
5. Navigate to the homepage of your Org (not the Setup Home, but the generic homepage) and note the URL. If for instance the full URL is "https://nativevideo-ed.lightning.force.com/lightning/page/home", note aside "https://nativevideo-ed.lightning.force.com", making sure it's in HTTPs and without the slash at the end.
6. Email to "hello@nativevideo.co" the following info, you will have to wait for a response before being able to progress with the installation:
 - a. URL noted at point 5
 - b. The image you want to use as watermark in your videos. We recommend high definition and transparent background.
7. Navigate to the "VisualForce Pages" section in the Salesforce Setup and look for the "VideoConfigurations" page, for instance clicking on the "V" in the alphabet navigation top-right. Once identified, click on the preview icon, so that the "VideoConfigurations" page is opening in a new tab. Fill in the following information you have received via email at step 6.

2. Install and Configure LeadGenVideo

Pre-Installation Steps

None.

Package Installation

Login to the target Org and install through this relative URL:
`/packaging/installPackage.apexp?p0=04t1r000001G16v`

Post-Installation Steps

Once the package has been installed, please follow these manual steps:

1. In the Salesforce Setup panel, navigate to the "Sites" page and click on the "NativeVideo Public Site" label. Then click on the "Public Access Settings" button

and then on the “Assigned Users” button. Click on the “Site Guest User, NativeVideo Public Site” user and add the following permission sets:

- a. NativeVideo Permissions ProspectVideo
 - b. NativeVideo Public Site User Permissions ProspectVideo
2. In the “Object Manager” in the Setup panel, select the “Lead” object and pen the page layout you want to update. Finally, include the "Send Video Email" Lightning Action and save. This Action will trigger the recording & sending of new video email messages.
3. Again from the Lead object, open the Lead Details Page with the Lightning App Builder and add the "VideoProspectBrowsing" Lightning Component where you prefer. This component will allow your user to watch previous messages and monitor the analytics.
4. Lastly, add the following permission set to all users entitled to use LeadGenVideo:
 - a. NativeVideo Permissions ProspectVideo

Optional Configurations

The following are optional configurations that you might want to consider:

1. **Banners:** you can add an email banner at the top of your messages and a website banner to the portal page where the full video is displayed. Just upload two Documents in Salesforce (it doesn't matter in which folder), with the following details:
 - a. Email Banner:
 - i. “Document Unique Name” set to “NativeVideo_VideoLead_Email_Banner”
 - ii. “Externally Available Image” checked true
 - iii. Suggested image size: 130px high, 694px wide
 - b. Website Banner:
 - i. “Document Unique Name” set to “NativeVideo_VideoLead_Banner”
 - ii. “Externally Available Image” checked true
 - iii. Suggested image size: 150px high, 1376px wide
2. **Email Templates:** Speed up the message creation leveraging email templates. Create “Custom” email classic templates, with a "Template Unique Name" that starts with the "NV_LGV" prefix, so that they can be automatically displayed by the "Send a Video Email" component