

Post Install Instructions

Index

Adding Remote Site Settings	1
Adding Credentials	1
Optional steps	2
Adding Queryable Object	2
Add fields on user layout	3
Technical Requirements	3
Enable My Domain to Use Lightning Components	3

Adding Remote Site Settings

Before any Apex callout can call an external site, that site must be registered in the Remote Site Settings page, or the callout fails. Salesforce prevents calls to unauthorized network addresses.

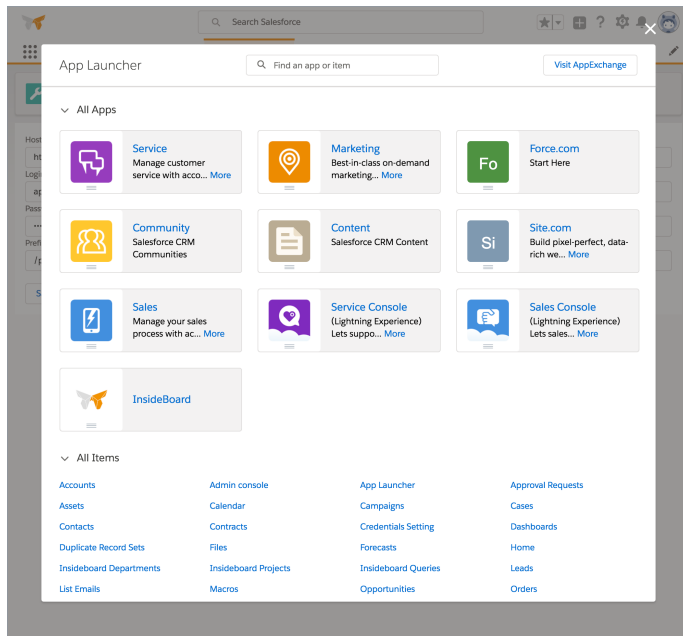
To add Insideboard HOST URL as a remote site setting:

1. From Setup, enter Remote Site Settings in the Quick Find box, then select **Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter a descriptive term for the Remote Site Name. (ex: Insideboard_Host)
4. Enter the URL for the HOST. (ex: https://example.pilot.insideboard.com)
5. Optionally, enter a description of the site.
6. Click **Save**.

Adding Credentials

In order to allow Salesforce to authenticate on the Insideboard APIs, you must set the credentials.

Open the application called InsideBoard from the App Launcher.



Open the tab called **Credentials Setting** and setup values and click on save:

Host is the endpoint provided by InsideBoard Team

Login is the username provided by InsideBoard Team

Password is provided by InsideBoard Team

Prefix is the API version provided by InsideBoard Team

 A screenshot of the Salesforce "Credentials Setting" configuration page. The page has a header with the Salesforce logo, a search bar, and navigation tabs: InsideBoard, Admin console, Credentials Setting (selected), Insideboard Projects, Insideboard Queries, and Insideboard Departments. The main content area is titled "Credentials Setting" and contains four input fields: Host (with the value "https://example.insideboard.com"), Login (with the value "app@example.insideboard.com"), Password (masked with dots), and Prefix (with the value "/public-api/version/3.0"). A "Save" button is located at the bottom left of the form.

⚠ Password field only accepts input and does not render the value back on the page

Optional steps

Adding Queryable Object

You must define the list of objects allowed to be used in KPIs calculation.

Go to Custom Metadata Types:

All Custom Metadata Types

[Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type						
Action	Label	Namespace Prefix	Visibility	Api Name	Record Size	Description
Del Manage Records	 Insideboard Queryable Object	insideboard	Public	insideboard__Queryable_Object__mdt	151	

And click on **Manage Records** and on **New** to create a new record.



You don't need, and you can't create a Queryable Object for the User object.

You can see below an example for the Account object.

Insideboard Queryable Object

[Help for this Page](#)

Insideboard Queryable Object
Edit

[Save](#)
[Save & New](#)
[Cancel](#)

Information
! = Required Information

Label

Account

Protected Component

☐ 

Insideboard Queryable Object Name

Account 

Object

Account 

[Save](#)
[Save & New](#)
[Cancel](#)

Add fields on User Layout

The package creates 2 fields on the User Object:

Is Head of	insideboard__Is_Head_Of__c	Checkbox	
Insideboard Department	insideboard__IB_Department__c	Text(18)	

You can optionally add this fields on User layout in order to setup a custom hierarchy and custom department.

Go to **SETUP | OBJECT MANAGER | User | User Page Layouts** and click on **Edit**.

Then drag and drop the two fields on the layout and click **Save**.

Technical Requirements

Enable My Domain to Use Lightning Components

For security purposes, Lightning components now require you to define a custom Salesforce domain name for your organization.

If you're not already using a custom domain name, refer to the "Guidelines and Best Practices for Implementing My Domain".