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Messaging Intelligence for Salesforce

Installation

Details the application installation process and installed items
Highlights the need to ensure pertinent actions are taken before and after installation

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Contents

1 Messaging intelligence for Salesforce

1.1 General

This application provides Salesforce with communication information retrieved from TrustSphere's TrustVault service. TrustVault improves the visibility and integrity of messaging services. It protects the integrity, reliability and trust of a company's messaging infrastructure and improves productivity by enhancing communication visibility.

1.2 Pre-requisites

The following are required:

- A deployment of TrustVault v2.7 and above.
- A deployment of ClientServices v2.0 and above
- A deployment of Salesforce; Group edition or above.
- A minimum free data space of approximately 2K per contact, lead and opportunity contact.

1.3 Upgrading

If upgrading from version 1.3.x new credentials are required to access the TrustSphere service. To receive new credentials contact support@trustsphere.com

1.4 Salesforce Lightning

The application is compatible with Salesforce Classic and Salesforce Lightning user interfaces. Deployment instructions are given for both interfaces.

1.5 TrustSphere

The TrustSphere service connects to the local organization's email infrastructure. This connection can be to internal email servers or to a cloud based email service.

The service extracts metadata derived from email transactions and provides the communication information to the TrustSphere Salesforce application

TrustSphere customers with an existing ClientServices deployment, can simply create an access key for Salesforce on their existing service, or request an access key from TrustSphere.

2 Installation

2.1 Pre Installation

Ensure the Salesforce organization has sufficient free resources to install the application. In particular consider the Salesforce edition limitations. (Section 2.8)

Consider which Salesforce users should have access to the additional information provided and create an additional user role or set the existing permissions accordingly.

Consider if exclusions for privacy of information should be configured before starting initial synchronization. (Section 2.5.1)

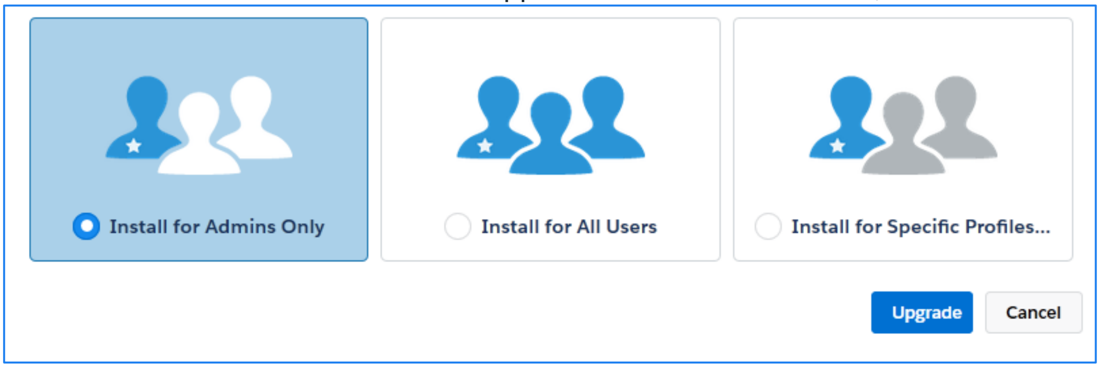
2.2 Patches Required

No patches are required. Refer to the release notes that detail the new features and resolved issues.

2.3 Installation from Application Exchange

The package installation is started from the application exchange listing https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B49hPEAR

The installation will ask for whom the application should be useable,



During installation a pop-up appears requesting approval to access third party websites. This configures access to the generic TrustSphere service.

Click the **yes** checkbox to grant access, the TrustSphere service is later configured in the **TrustSphere Setup**.

Click the **OK** button, the installation process will start and may take a few minutes.

- The package may show an installation error, if it is not compatible with the current Salesforce edition.

The error will list features that are missing from the Salesforce edition required for installing the package. NOTE: Managed packages from the application exchange are allowed to install certified features on all editions.

In Enterprise or Unlimited editions the security level for user access to the package fields and related lists can be selected. For group or professional editions see section 2.8.

Once installed, a notification email will be sent and the installation status is shown.

2.4 Application Configuration

Application configuration has four steps:

1. Configure the TrustSphere service (section 2.5.1)
2. Enable remote site access for the TrustSphere service (section 2.5.2)
3. Configure required TrustSphere information (section 2.6)
4. Update page layouts to display TrustSphere information (section **Error! Reference source not found.**)

2.5 Post Installation

Once the application is installed the connection with the TrustSphere service is configured to retrieve communication activity information.

Note that users of a TrustSphere cloud service can skip to section 2.5.2.
The required configuration will have been carried out by the service administrator.

2.5.1 TrustSphere Service Configuration

The Salesforce application requires the following information from the TrustSphere ClientService

- Service URL (Configured with a valid certificate)
- Access key (Allowing Salesforce and widget applications)

2.5.1.1 ClientServices certificate

To enable connection of the Salesforce application to a TrustSphere service, an appropriate certificate is required to be installed on the ClientServices service.

This ensures connections to Salesforce are encrypted and terminated at the correct destination. Salesforce matches the domain name of the destination with the certificate and the remote site settings defined in Salesforce.

For example: If the ClientServices service resides at customer.service.com, the Common Name (CN) field within the Distinguished Name (DN) of the certificate must match (customer.service.com) and the Salesforce remote site settings server URL value must be https:\\customer.service.com \.

Wildcard certificates are also valid, e.g. CN of *.service.com will match the remote site settings URL of my.service.com

Salesforce does not support the use of self-signed certificates.

The list of Salesforce approved certificate authorities can be found at https://developer.salesforce.com/page/Outbound_Messaging_SSL_CA_Certificates

NOTE: Salesforce have decided not to add any more intermediate certificates to Salesforce's list of trusted certificates. To use newer certificates the authority provides a bundle of chained certificates which should be concatenated to the signed server certificate.

When a certificate has been obtained from a Salesforce approved certificate authority, a chained certificate must be created. The server certificate **must** appear before the chained certificates in the combined file.

e.g. # cat www.example.com.crt bundle.crt > www.example.com.chained.crt

This ‘chained’ certificate can then be installed on the ClientServices service;

2.5.1.2 ClientServices access key

An access key is required to enable Salesforce access to information from the ClientService.

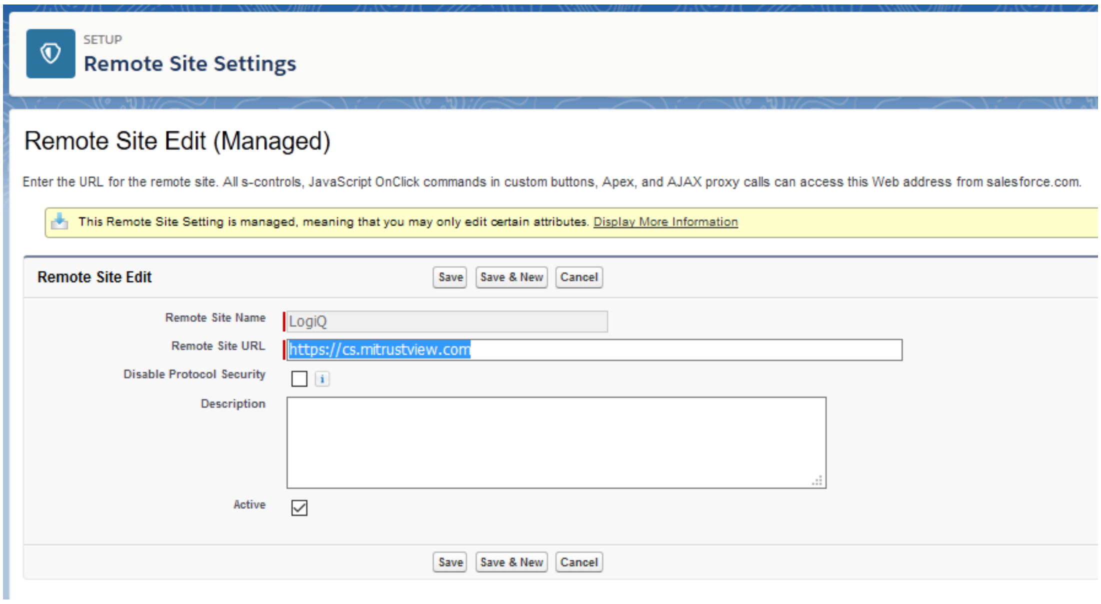
The ClientServices administrator should create a new access key using the key administration features of the ClientServices administration application.

Create the key in the group that will supply the information for SalesForce

The key must be given access to the **salesforce** and **widget** applications.

2.5.2 Remote Site Access

To enable Salesforce to remotely access the TrustSphere service, navigate to **Setup | Security | Remote site settings** or **Setup | Administration Setup | Security Controls | Remote Site Settings** in Classic



- Find the existing entry for "LogiQ", this should have a URL of https://cs.mitrustview.com

Remote Site Name: LogiQ
Remote Site URL: Enter the TrustSphere service URL as detailed on your Welcome letter[1]
Disable protocol security: Unchecked
Active: Checked
Description: Optionally add a description or reason for the remote connection

This enables information to be securely retrieved from TrustSphere.
All information is transferred as encrypted data.

- Find the existing entry for "TrustSphere", this should have a URL of https://tlp.trustsphere.com

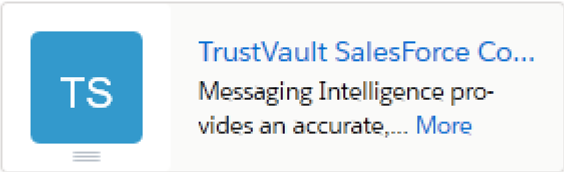
This enables the application to validate the connection to the TrustSphere service by authenticating the service with TrustSphere.

This is required for the [Test] connection feature in the application setup.

The default application settings do not require adjustment.

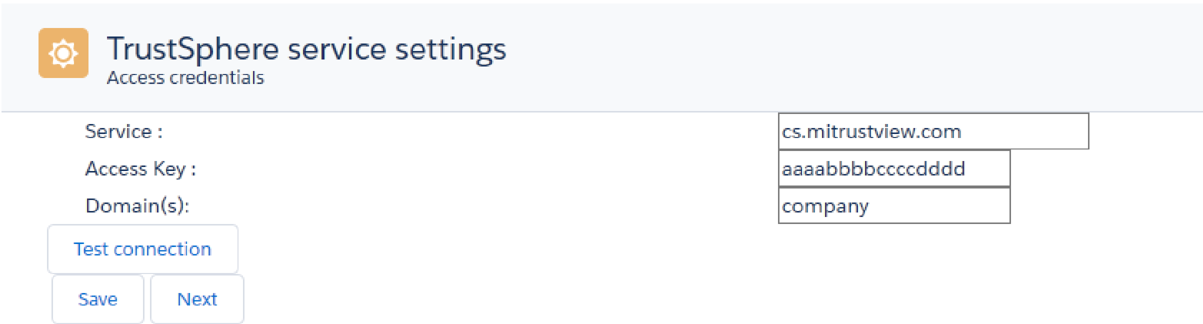
[1] The URL should match the common Name (CN) from TrustVault LogiQ service SSL certificate (e.g. https://customer.service.com. The URL can point to a single or cluster of TrustVault servers, as the API supports multi-hosting.

2.5.3 Service connection settings



Open the application from the App Launcher by selecting the "**TrustVault Salesforce Connector.**"

Click on **TrustSphere Setup** tab



Enter the **service URI**, **access key** and **domain** for the specific TrustSphere service, noted in section 2.5.1 or as detailed in the welcome letter.

NOTE the **URI** for the TrustSphere service will be the same as entered for the Salesforce remote site settings; without the protocol (https://)

For example if the **remote site URL** is https://cs.mitrustview.com
The **Service** is cs.mitrustview.com

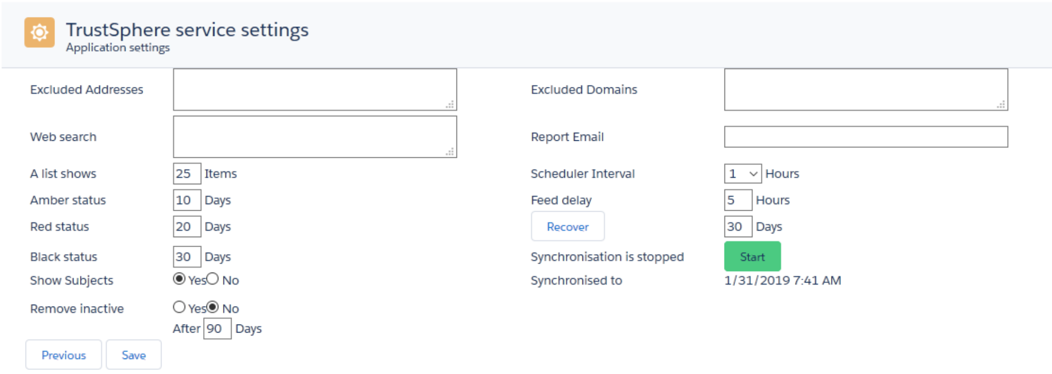
NOTE: Ensure that extra spaces or carriage returns are not added to the lines as this will prevent successful connection.

Press the "**Save**" button to store the updated settings.
Press the "**Test**" button to verify the connection to the service.
Press the "**Next**" button to continue once successful.

If a connection is unsuccessful, the test will provide an explanation message with advice on remedying the issue. Contact support@trustsphere.com for assistance if required.

2.6 Service information settings

These settings configure the scope of information to be retrieved from TrustSphere and how it is matched with the Accounts, Opportunities, Contacts and Leads. Once changes have been made, press the "**Save**" button to store the updated settings.



2.6.1 Information Synchronization

TrustSphere provides information relating to the communication activity between the organization and the contacts and leads in the CRM.

If specific communication is required to be excluded for privacy or regulatory purposes, it is possible to request this activity is not provided.

Excluded addresses:

This setting identifies email addresses to be excluded from the information. Refer to detailed information in 2.7.1.

To exclude enter a comma separated list of email addresses into the **Excluded addresses** list, e.g. the.cto@importantaccount.net,myceo@local.com

This can be changed at any time, and takes effect from the next synchronization.

Excluded Domains

This enables email domains to be excluded from the information. Refer to detailed information in 2.7.1 and 2.7.2.

Enter a comma separated list of domain names. Ensure each domain starts with an "@".

For example, to exclude all communication with addresses at companyacountants.fr, enter into the **Excluded Domains** list, **@companyaccountants.fr**

Web Links

Enter the URL of an external website that can provide details for persons of interest when considering creating a new contact from a TrustSphere identified missing contact.
The URL should contain the full website address including any search preambles

`e.g. https://www.linkedin.com/search/results/people/?keywords=`

The application will add the first name, last name and company name to create a complete search URL

`https://www.linkedin.com/search/results/people/?keywords=Alan Dean Company`

Report Email

Reporting is enabled by entering a valid email address, leave blank to disable reporting. Reporting information is sent at the conclusion of each scheduled synchronization and upon occurrence of Salesforce error conditions.
(TrustSphere support may specify an email address to enable information to be sent in support of issues or enquiries)

Scheduler Interval

This determines the period between updates of information from TrustSphere.
Select the number of hours between scheduled updates, (default 1 hour).

Note: If the expected volume of email activity is very high, then select a small period to ensure the Salesforce transfer limits for data are not exceeded. The limit is approximately the period in which 5000 email messages are sent or received by the local email infrastructure.

Feed delay

This setting is to allow for delays in the email infrastructure reporting activity to TrustSphere. The setting will be advised in the welcome letter.

For example, if the mail system updates TrustSphere every two hours, then the time offset is set to 2, as the information is 2 hours old when received by TrustSphere

Recover

This determines the number of days of previous activity to retrieve after installation or after the **recover** button is pressed.

Enter the number of days. (Default 14 days).

Remove inactive

This allows removal of in-active communication information from Salesforce to regain data storage.

Select '**No**' if information is to be retained indefinitely in the Salesforce database.
Select '**Yes**' if non-active communication information is to be removed, and set the **number of days** of inactivity before information is removed.

A list shows

This determines the default number of items to be listed the application VisualForce pages (default 25).

Show subjects

This determines if subject lines from messages should be listed the application VisualForce pages (default No).

Note: The TrustSphere service administrator may have disabled subject visibility. In this case, no subject information is available to SalesForce and subjects will be blank.

2.6.2 Indicator settings

A traffic light system of indicators is used to highlight the latest activity.

The thresholds for each indicator determine the status color according to the number of days since the last communication activity occurred.

Indicator Colour	Identifies	Displayed when latest activity is: (relative to the current date)	Default Values
	Active communication	Less than or equal to **(Amber satus)**	10 days
	Paused communication	Greater than **(Amber status)** but less than or equal to **(Red status)**	20 days
	Inactive communication	Greater than **(Red status)** but less than or equal to **(black status)**	90 days
	No communication	Greater than **(black status)**	

Table 1 – Status indicator settings

2.6.3 Synchronization Control

Synchronization of information from TrustSphere is controlled by the **start** and **stop** button. It can be stopped and started at any time. When synchronization is running, the date of the latest activity information **synchronized to** Salesforce is shown.

Following installation, starting synchronization will recover all previous activity for the **Recover** period. Once completed, synchronization continues to maintain the latest activity.

Previous activity can be recovered at any time by setting the period to recover in **Recover days**, and pressing the **Recover** button. The **Synchronised To** date will then move back to the start of the recovery period and the information will be updated at the next scheduled synchronization.

Note: If the expected volume of email activity is very high, then it may not be possible to recover the full period due to Salesforce transfer limits. The limit is approximately the period in which 5000 email messages are sent or received by the local email infrastructure.

2.7 Supporting Information

2.7.1 Excluding sensitive information

To ensure selected information related to individual domains or email addresses does not appear in SalesForce, use the **exclude** settings.

To	Use	Description	Usage
Include a local email domain	Domains	Only email addresses ending in the domain(s) specified in the list will have activity information updated	Restricts information to specific domains of departments or subsidiary companies
Remove a	Excluded	Email addresses ending in the	Removes communication

To	Use	Description	Usage
remote email domain	Domains	domains specified in the list will not have activity information updated	information for free-mailer domains, or external companies
Remove a local email address	Excluded Addresses	Email addresses specified in the list will not have activity information updated	Removes communication information for defined individuals
Remove a remote email address	Excluded Addresses	Email addresses specified in the list will not have activity information updated	Removes communication information for defined individuals

2.7.2 Non-account specific email domains and duplicated contacts

Contacts on an account may have email addresses that are not related to the account. For example contact@gmail.com, or contact@blackberry.com.

Contacts or leads may also be duplicated across multiple accounts and may also be assigned the same or multiple email addresses.

The application is un-affected by duplication or allocation of email address. The TrustSphere information for each account or opportunity relates only to the account or opportunity contacts.

2.7.3 Finding missing contacts

A powerful feature of the application is the identification of missing contacts

The algorithm infers the account email domain(s) from existing contact email addresses. However, if any contacts have email addresses using domains that are used by generic service providers the inferred email domain(s) will not be unique to the account.

Therefore, a known list of common generic domains is used to remove unwanted domains (e.g. @gmail.com)

Other unwanted domains can be removed by adding them to the **Excluded Domains** list. For example add **@unwanteddomain.com** into the **Excluded Domain** list.

Note: Contacts or leads having an email addresses matching these excluded domain(s), will be ignored. For example, adding **@unwanteddomain.com** to **Excluded Domain** list will mean a contact with an email address of **someone@@unwanteddomain.com** will not be subsequently updated with TrustSphere information.

2.8 Considerations for Salesforce editions

Due to the difference of features in Salesforce editions the following should be noted.

2.8.1 Visibility

If the application has been installed with admin only access and further users are required to be allowed access:

In Enterprise, Unlimited, and Developer Editions, access to applications is controlled through custom profiles. **Setup | Manage Users | Profiles.**

Once application access is granted, as for all information, the visibility is also dependent on the field access security settings for each field and object.

In Group and Professional editions for the fields to be visible on pages, the fields must first be added to the detail section of the related object (Account, Contact etc). This is because these editions do not have per-field permissions; the visibility is determined by the field being present in the detail section. **Setup | Page Layout**

Refer to: Access Control in Group and Professional Editions

The VisualForce custom page for opportunities that shows custom opportunity contact roles requires a permission set of "**viewAllData**" for the object, **customOpportunityContactRole**.

As custom permission sets are not available in Professional or Group editions, this additional page should not be deployed. See 2.9.7.2

2.8.2 External ID's

External ID's are used to provide a unique record identifier. Each object has independent limits on the number of database fields identified as externalID's. Applications share the allowed number of External ID's per object; therefore they are a finite resource in the organization.

Refer to: How many External ID's can an object have?

The application requires 1 free external ID for each of the three objects, Lead, Contact and Opportunity.

If the number of External ID's is exhausted, a request can be made to Salesforce to increase the number assigned to the organization.

2.8.3 Known issue workarounds

Salesforce has a limitation on the amount of data that can be transferred from external systems. If email activity is very high, or the period to recover is long, it is possible that the synchronization request can return more data than Salesforce can accept.

The Salesforce limit is approximately 3 Mbytes, or 5000 activity updates. However, Salesforce can adaptively increase or decrease the limit according to previous requests. Therefore, occasional occurrences of exceeding the limit are handled.

If the limit is being regularly exceeded, reduce the synchronization interval to allow Salesforce to request smaller activity updates.

2.9 Application deployment

The package contains components that can be deployed in Salesforce Classic and Salesforce Lightning user interfaces.

Custom fields
Information about the latest communication activity to accounts, opportunities, contacts and leads

Status indicators
Coloured indicators allowing quick reviews of activity status in list views and reports

Summary charts
Volume of activity over time showing trends

Relationships
Information about the relationship with associated contacts or leads, describing the network of individuals in communication.

Message history
Shows a time organised list of previous activity, as a page in classic or as an embedded window in lightning

Missing contacts
Proposes potential contacts based on activity, as a page in classic or as an embedded window in lightning

LinksWithin
Identifies strongest relationships with an account, contact or lead, as a page in classic or as an embedded window in lightning

Relationship graph (Lightning only)
A graph of the active relationship network with an account, contact or lead. Select nodes or links to drill down to communication information

Transition report (Lightning only)
Identifies the active relationships that would be important to maintain if network connections need to be transitioned between individuals

2.9.1 Account Page Layout

Navigate through **Setup | User Interface | Lightning app builder | Account record page** or **Setup | Customize | Accounts | Page Layout** in classic

2.9.1.1 Custom fields

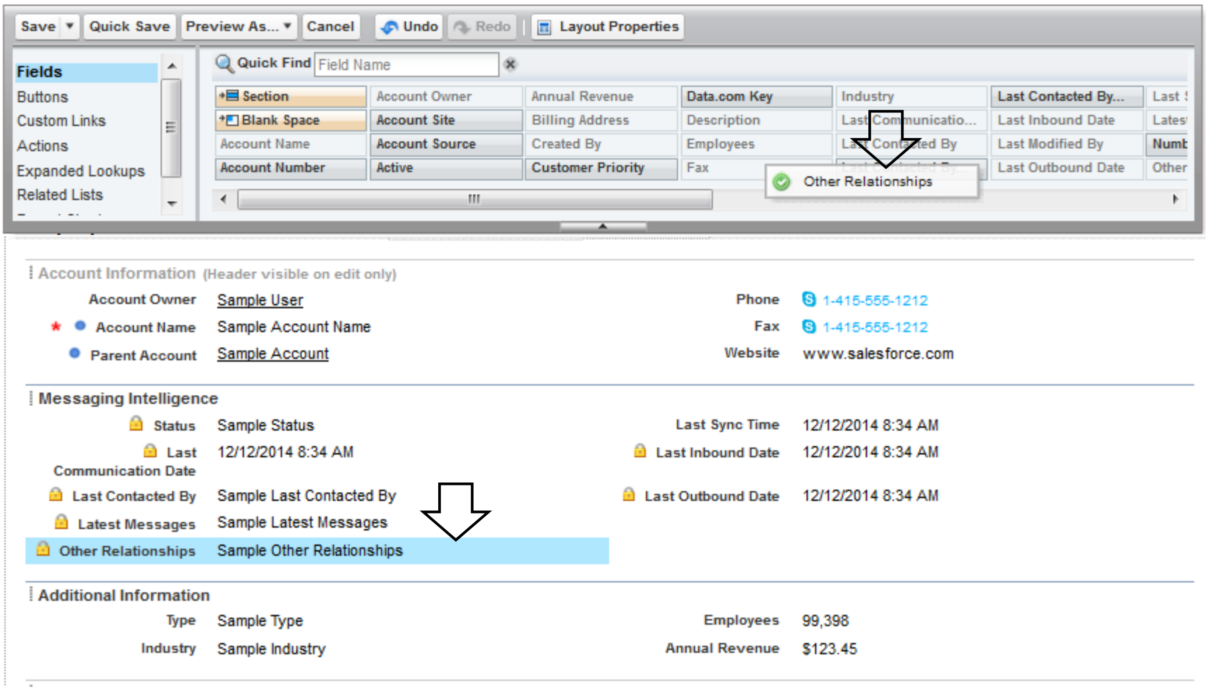
The fields can be added to the detail section of page layouts.

The available fields are displayed in fields section in the box, click and drag the fields onto the page. It is recommended to create a section in the page for the fields

Summary Information

Status : Summary indicator of activity status
Last Contacted By : Last person to communicate with the account contacts
Last Communication Date : Last date and time of communication
Last Inbound Date : Last date and time communication was received
Last Outbound Date : Last date and time communication was sent
Last Sync Time : Last date and time information was updated

Classic only
History : Displays a list of messages sent and received with the account
Other Relationships : Displays a list of communication with the account, but not with the account contacts. This allows discovery of new contacts.
LinksWithin : Displays a list individuals with strong relationships to the account

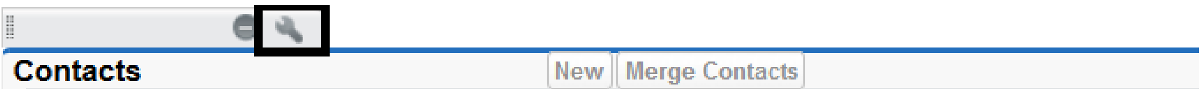


2.9.1.2 Relationships

The related list can be added to the existing related lists section of the page layout.

The lists are displayed in the related lists section in the box. Ensure the contacts list is displayed on the page layout.

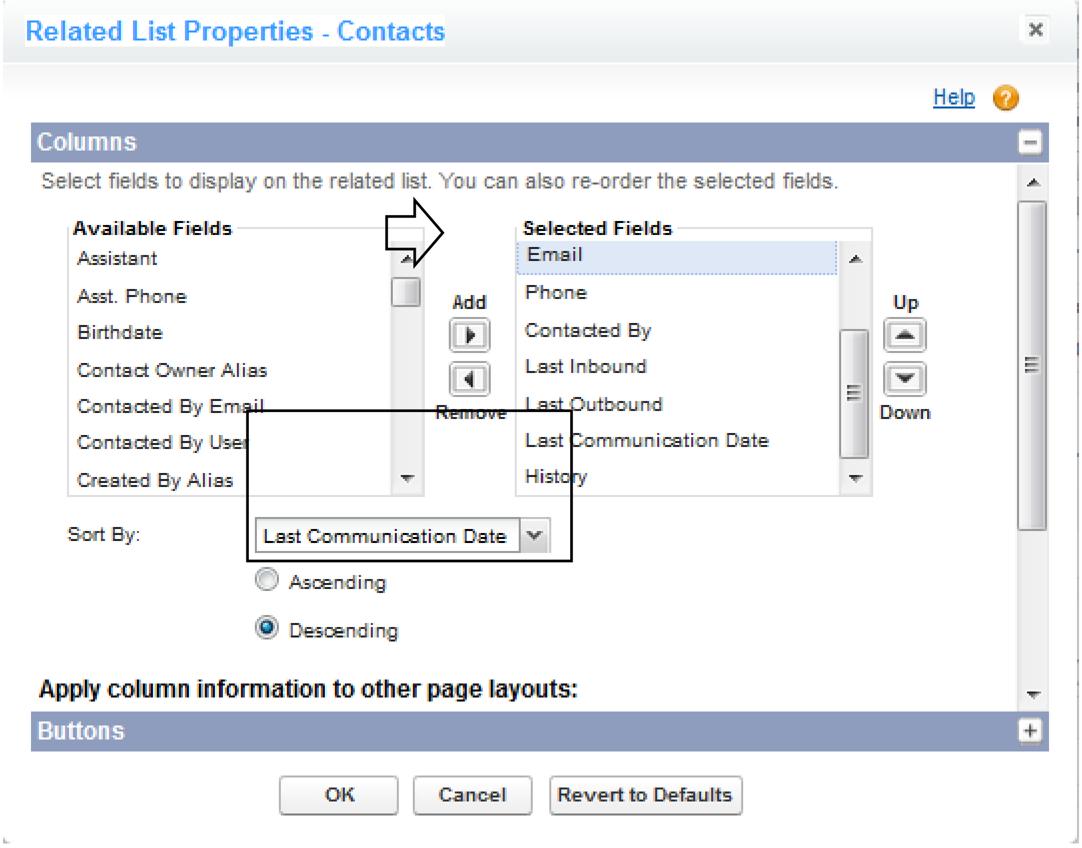
To add the information click the Tool icon on the **Contacts** tab.



Select fields and then choose **Add** or **Remove** to place in the list, order by **Up** and **Down**.

Contacted By : The last person to communicate with the contact
Last Communication Date : Last date and time of communication
Last Inbound Date : Last date and time communication was received
Last Inbound : Summary indicator of inbound communication status
Last Outbound Date : Last date and time communication was sent
Last Outbound : Summary indicator of outbound communication status
Last Sync Time : Last date and time synchronization updated the information

Classic only
History : Displays a list of messages sent and received with the contact
LinksWithin : Displays a list of individuals with strong relationships to the contact



To order the contact list by the latest communication date, change the Sort By: selection as shown.

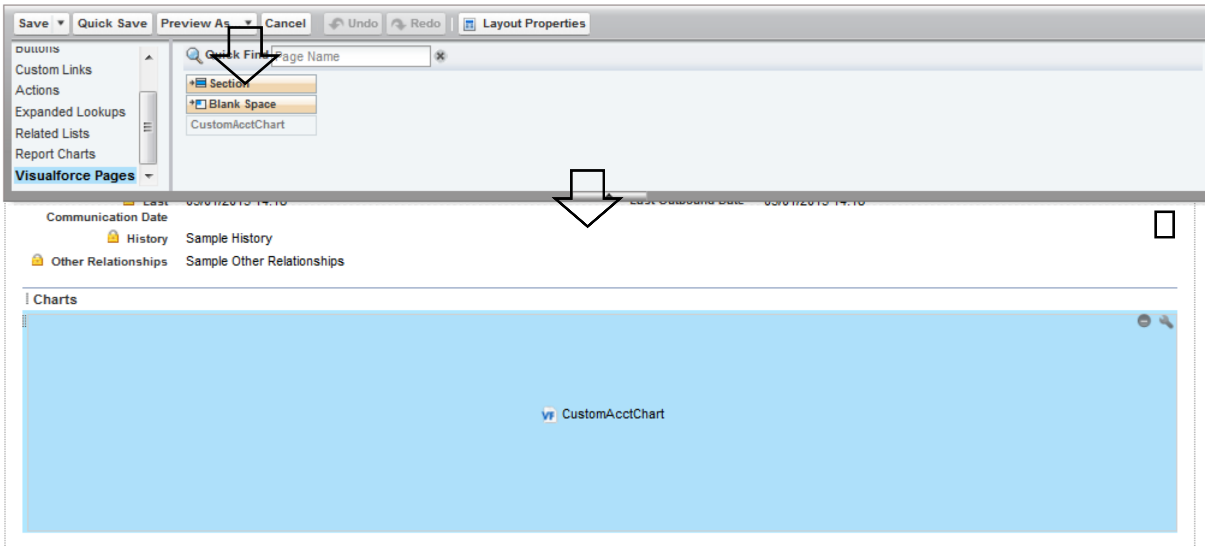
2.9.1.3 Summary Chart (Classic only)

The chart can be added to the detail section of page layouts.

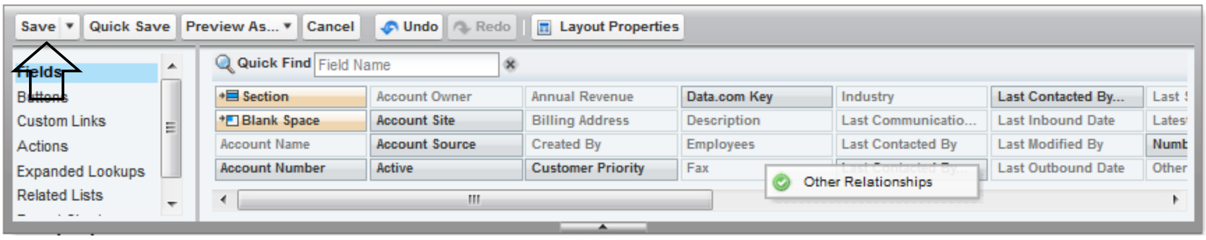
The charts are displayed in the VisualForce pages section in the box, click and drag the **CustomAcctChart** onto the page. It is recommended to create a section in the page for the chart so it can be resized

Charts

Volume : A bar chart of the inbound and outbound communication volume over the last twelve months.



When completed, save the updated layout.



Consider also updating the account search layout to include the new information in search results and enable searching on the additional fields.

2.9.2 Account Page Components for Lightning

Additional information can be displayed in lightning
Navigate through **Setup | User Interface | Lightning app builder | Account record page | edit**

2.9.2.1 Summary chart

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **CustomAcctChart** visualforce page name from the list.
Label the page 'Communication Volume' and place on the page layout

2.9.2.2 Message history

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **HistoricalTransactions** visualforce page name from the list.
Label the page '360 Degree Customer Interaction' and place on the page layout

2.9.2.3 Missing contacts

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select Visualforce and choose the **UnknownRelationships** visualforce page name from the list.
Label the page 'Missing Contacts' and place on the page layout

2.9.2.4 LinksWithin
This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select Visualforce and choose the **LinksWithin** VisualForce page name from the list.
Label the page 'LinksWithin and place on the page layout

2.9.2.5 Relationship graph
This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **RelationshipGraph** VisualForce page name from the list.
Label the page 'Relationship graph and place on the page layout

2.9.3 Contact Page Layout
Navigate through **Setup | User Interface | Lightning app builder | Contact record page** or **Setup | Customize | Contacts | Page Layout** in classic

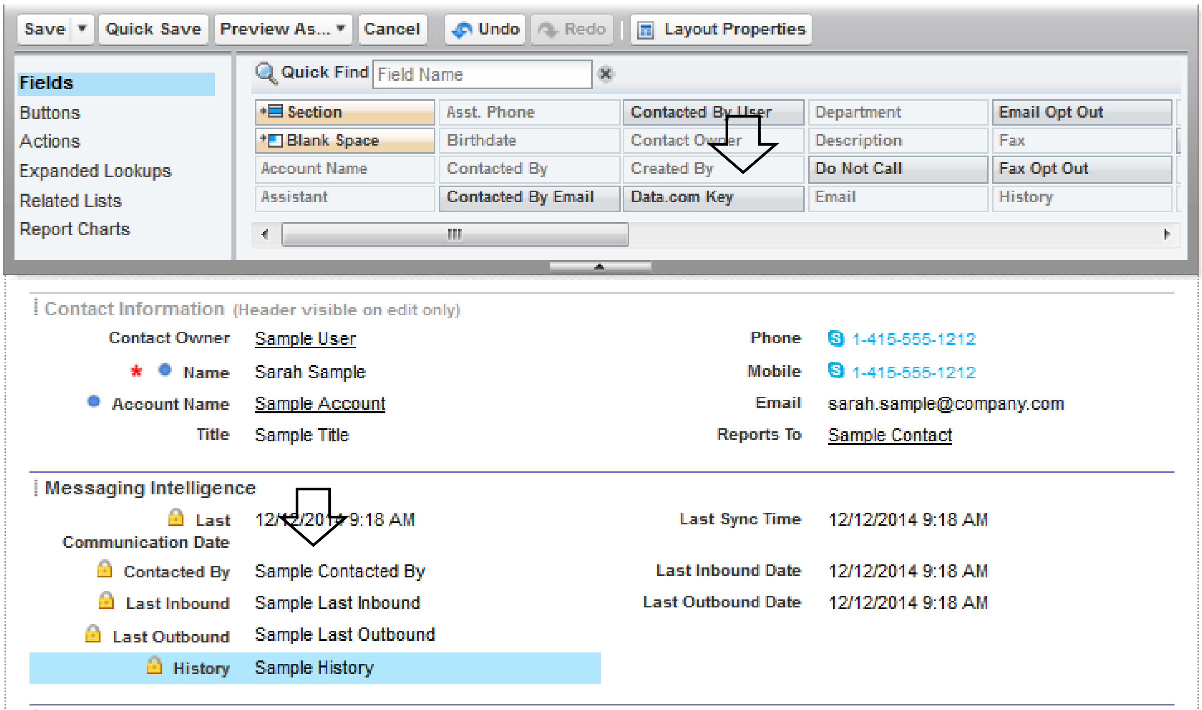
2.9.3.1 Custom fields
The fields can be added to the detail section of page layouts.

The available fields are displayed in fields section in the box, click and drag the fields onto the page. It is recommended to create a section in the page for the fields

Summary Information

Contacted By : The last person to communicate with the contact
Last Communication Date : Last date and time of communication
Last Inbound Date : Last date and time communication was received
Last Inbound : Summary indicator of inbound communication status
Last Outbound Date : Last date and time communication was sent
Last Outbound : Summary indicator of outbound communication status
Last Sync Time : Last date and time synchronization updated the information

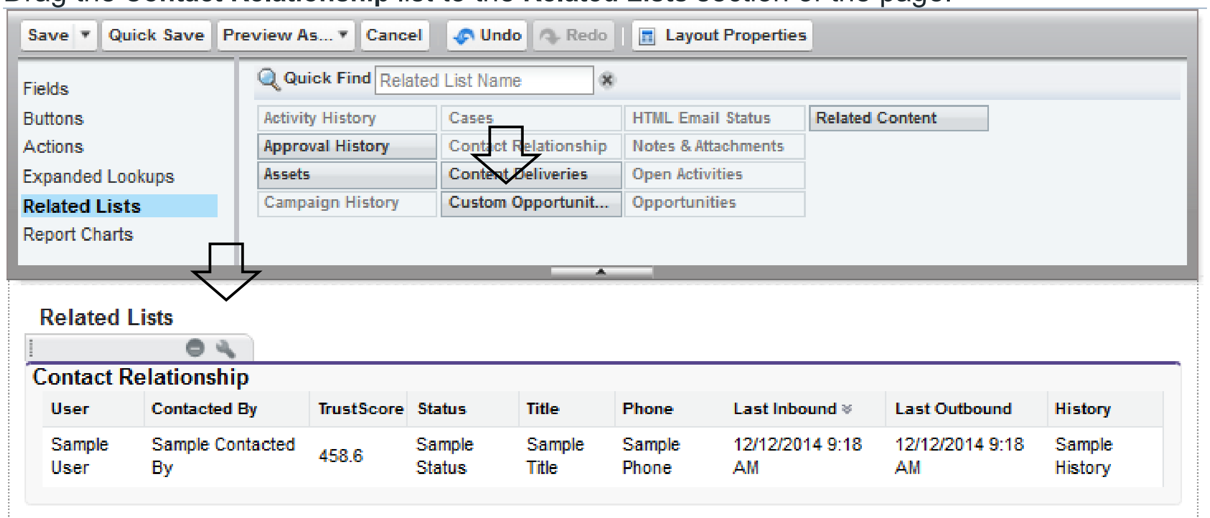
Classic only
History : Displays a list of messages sent and received with the contact
LinksWithin : Displays a list individuals with strong relationships to the contact:



2.9.3.2 Relationships

This provides new information identifying all the local persons in communication with the contact. These can be added as a new **Related List** called **Contact Relationship**

Drag the **Contact Relationship** list to the **Related Lists** section of the page.

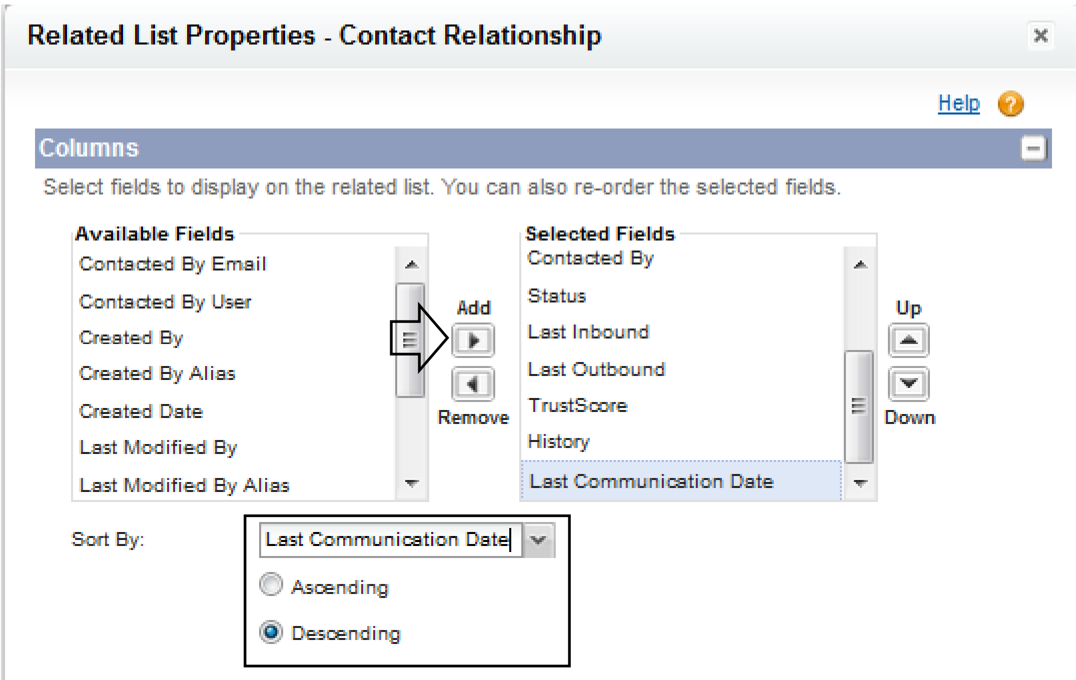


Select the Tool icon on the **Contact relationships** tab, to configure the information to be included in the list. Select the fields and then choose **Add** or **Remove** to place in the selected fields, order by **Up** and **Down**.

Contact Relationship

Status : Summary indicator of communication status
Contacted By : The person in communication with the contact

Last Communication Date : Last date and time of communication
Last Inbound : Last date and time communication was received
Last Outbound : Last date and time communication was sent
History : Displays a list of messages, with subjects, sent and received with the contact
TrustScore : A metric indicating the cohesiveness of the relationship with the contact



Press the **OK** button when the list is complete.

2.9.3.3 Summary Chart (Classic only)

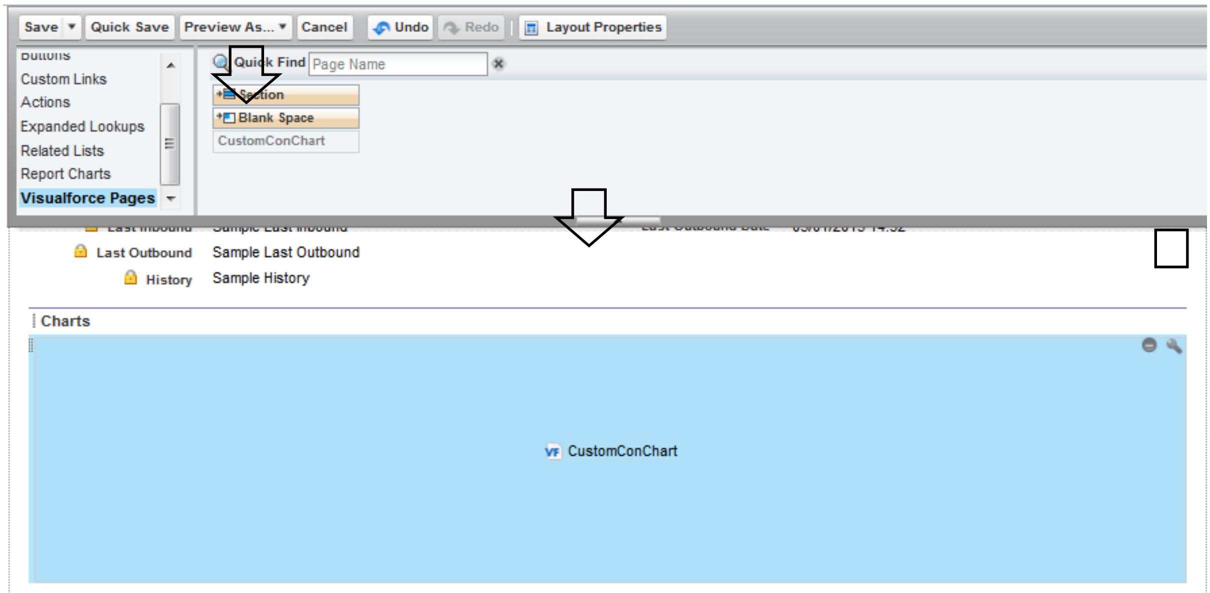
The chart can be added to the detail section of page layouts.

The charts are displayed in the VisualForce pages section in the box, click and drag the **CustomConChart** onto the page. It is recommended to create a section in the page for the chart so it can be resized

Charts

Volume : A bar chart of the inbound and outbound communication volume over the last twelve months.

Strength : A radar chart showing the strength of each local relationship with the contact.



When completed, save the updated layout.

Consider also updating the contact search layout to include the new information in search results and enable searching on the additional fields.

2.9.4 Contact Page Components for Lightning

Additional information can be displayed in lightning
Navigate through **Setup | User Interface | Lightning app builder | Contact record page | edit**

2.9.4.1 Summary chart

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select Visualforce and choose the **CustomConChart** visualforce page name from the list.
Label the page 'Communication Activity and place on the page layout

2.9.4.2 Message history

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select Visualforce and choose the **HistoricalTransactions** visualforce page name from the list.
Label the page '360 Degree Customer Interaction' and place on the page layout

2.9.4.3 LinksWithin

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **LinksWithin** VisualForce page name from the list.
Label the page 'LinksWithin and place on the page layout

2.9.4.4 Relationship graph

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **RelationshipGraph** VisualForce page name from the list.
Label the page ‘Relationship graph and place on the page layout

2.9.5 Lead Page Layout

Navigate through **Setup | User Interface | Lightning app builder | Lead record page** or **Setup | Customize | Leads | Page Layout** in classic

2.9.5.1 Custom fields

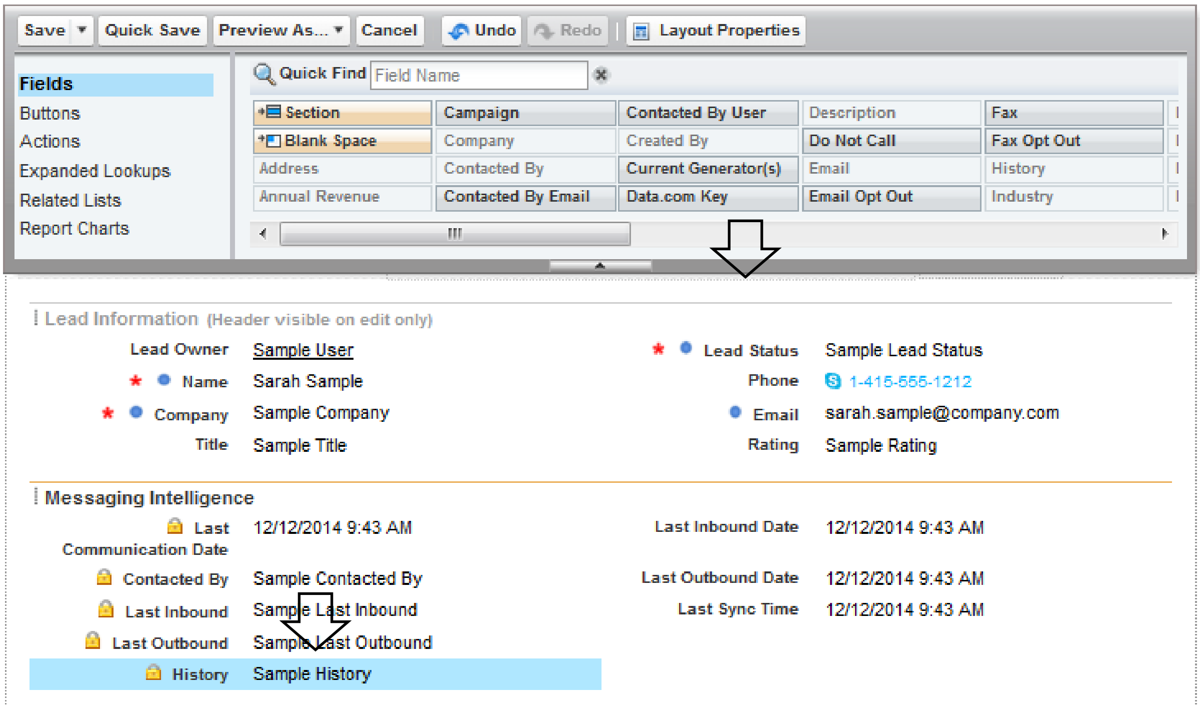
The fields can be added to the detail section of page layouts.

The available fields are displayed in fields section in the box, click and drag the fields onto the page. It is recommended to create a section in the page for the fields

Summary Information

Contacted By : The user name or email address of last person to communicate with the lead
Last Communication Date : Last date and time of communication
Last Sync Time : Last date and time synchronization updated the information
Last Inbound Date : Last date and time communication was received
Last Inbound : Summary indicator of inbound communication status
Last Outbound Date : Last date and time communication was sent
Last Outbound : Summary indicator of outbound communication status

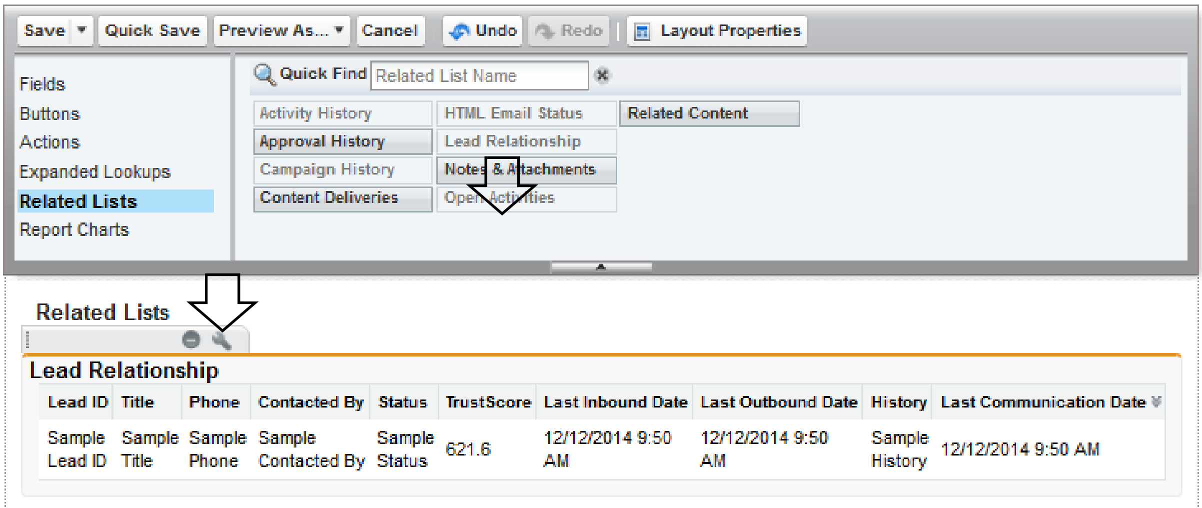
Classic only
History : Displays a list of messages sent and received with the lead
LinksWithin : Displays a list individuals with strong relationships to the lead



2.9.5.2 Relationships

This provides new information identifying all the local persons in communication with the lead. These can be added as a new **Related List** called **Lead Relationship**

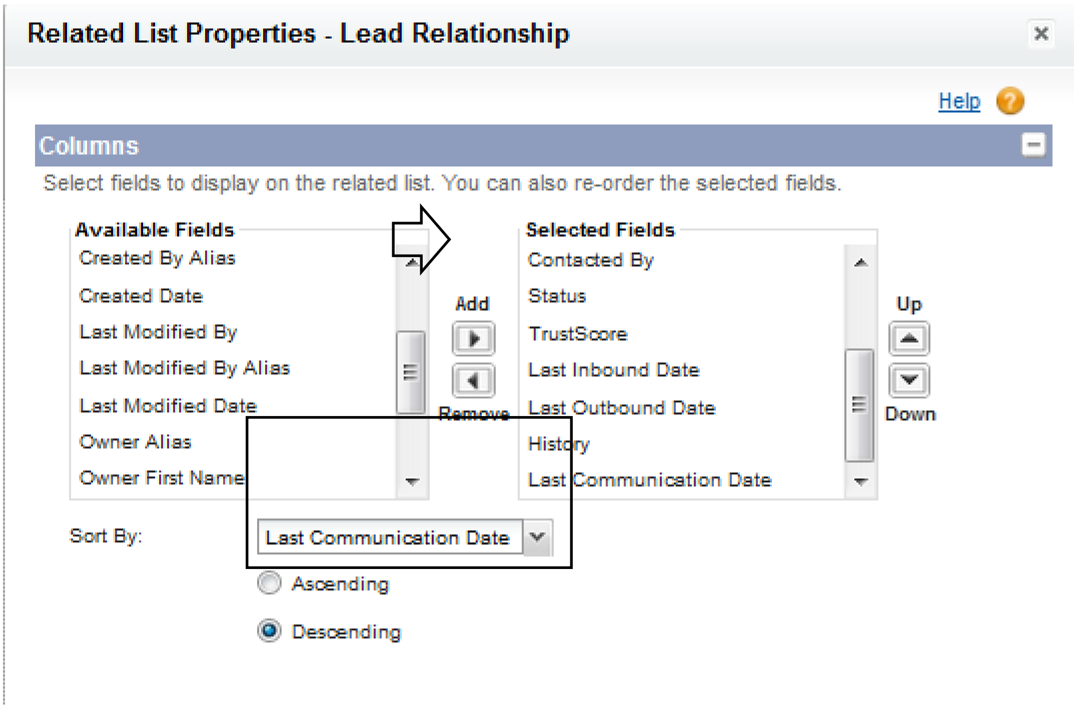
Drag the **Lead Relationship** list to the **Related Lists** section of the page..



Select the Tool icon on the **Lead Relationships** tab, to configure the information to be included in the list. Select the fields and then choose **Add** or **Remove** to place in the selected fields, order by **Up** and **Down**.

Lead Relationships

Status : Summary indicator of communication status
Contacted By : The last person to communicate with the lead
Last Communication Date : Last date and time of communication
Last Inbound Date : Last date and time communication was received
Last Outbound Date : Last date and time communication was sent
History : Displays a list of messages, with subjects, sent and received with the lead
TrustScore : A metric indicating the cohesiveness of the relationship with the lead



Press the **OK** button when the list is complete.

2.9.5.3 Summary Chart (Classic only)

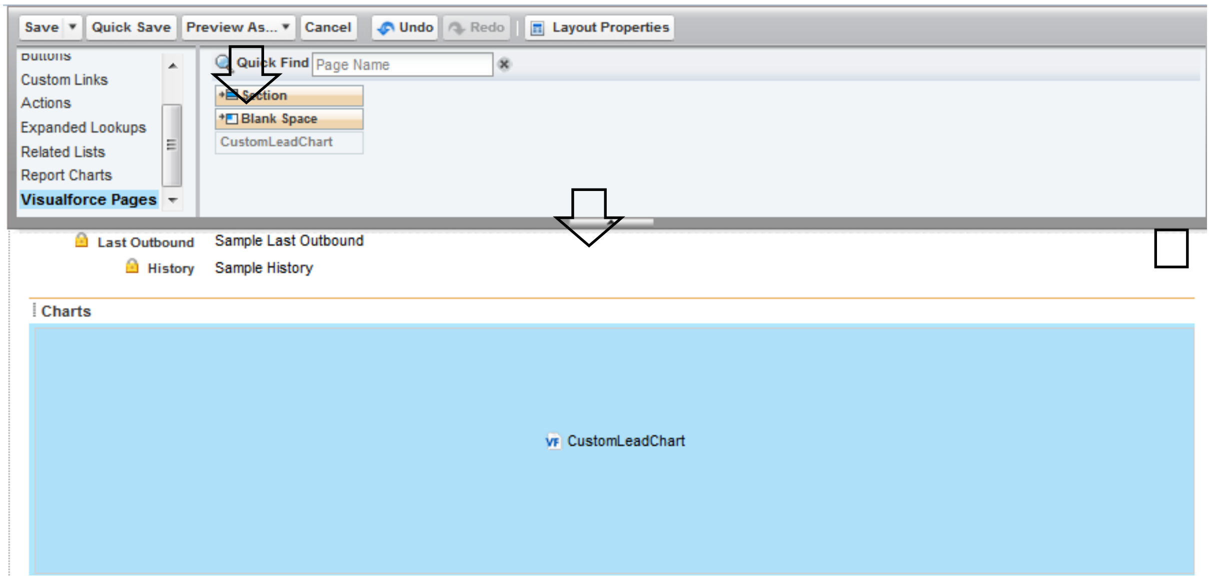
The chart can be added to the detail section of page layouts.

The charts are displayed in the VisualForce pages section in the box, click and drag the **CustomLeadChart** onto the page. It is recommended to create a section in the page for the chart so it can be resized

Charts

Volume : A bar chart of the inbound and outbound communication volume over the last twelve months.

Strength : A radar chart showing the strength of each local relationship with the lead.



When completed, save the updated layout.

Consider also updating the lead search layout to include the new information in search results and enable searching on the additional fields.

2.9.6 Lead Page Components for Lightning

Additional information can be displayed in lightning
Navigate through **Setup | User Interface | Lightning app builder | Lead record page | edit**

2.9.6.1 Summary chart

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **CustomLeadChart** visualforce page name from the list.
Label the page ‘Communication Activity and place on the page layout

2.9.6.2 Message history

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **HistoricalTransactions** visualforce page name from the list.
Label the page ‘360 Degree Customer Interaction’ and place on the page layout

2.9.6.3 LinksWithin

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select 

and choose the **LinksWithin** VisualForce page name from the list.
Label the page ‘LinksWithin and place on the page layout

2.9.6.4 Relationship graph

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **RelationshipGraph** VisualForce page name from the list.
Label the page 'Relationship graph and place on the page layout

2.9.7 Opportunity Page Layout:

Navigate through **Setup | User Interface | Lightning app builder | Opportunity record page** or **Setup | Customize | Opportunity | Page Layout** in classic

2.9.7.1 Custom fields

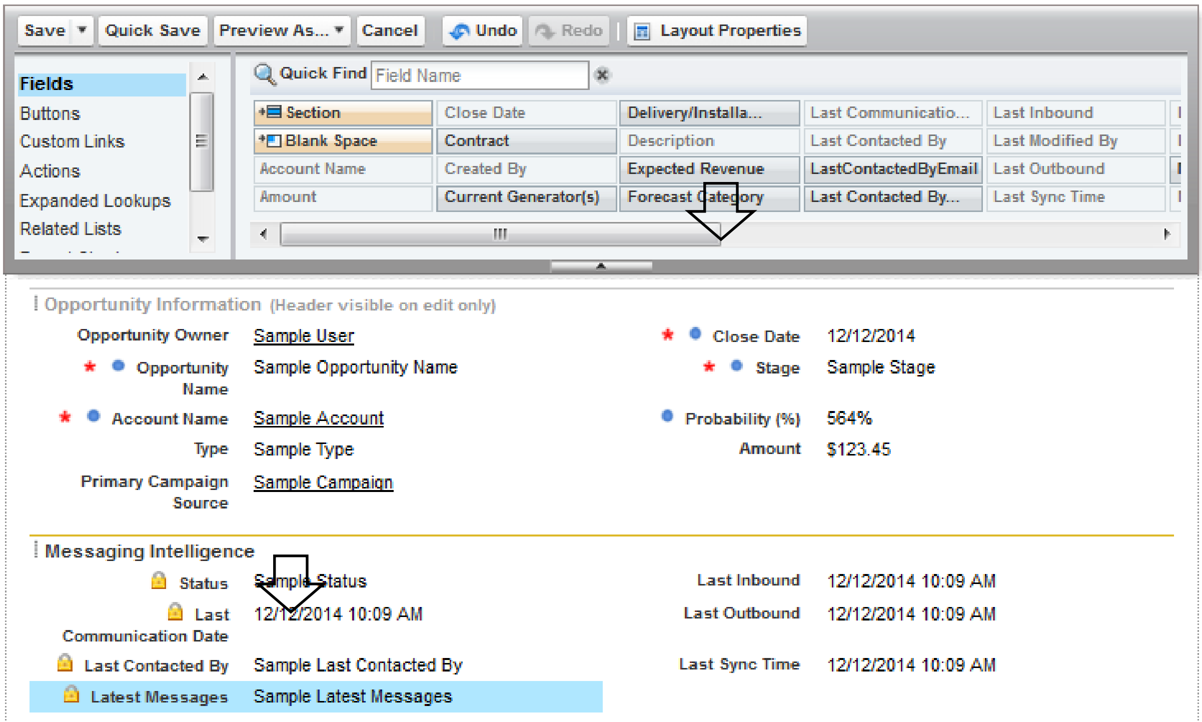
The fields can be added to the detail section of page layouts.

The available fields are displayed in fields section in the box, click and drag the fields onto the page. It is recommended to create a section in the page for the fields

Summary Information

Status : Summary indicator of communication status
Last Contacted By : The last person to communicate with the opportunity
Last Communication Date : Last date and time of communication
Last Inbound: Last date and time communication was received
Last Outbound: Last date and time communication was sent
Last Sync Time : Last date and time synchronization updated the information

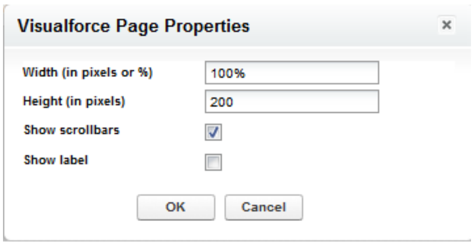
Classic only
History : Displays a list of messages sent and received with the opportunity.



2.9.7.2 Relationships (Classic only)

The related list can be added to the existing related lists section of the page layout.
It is not possible to modify the existing Opportunity Contact Roles list to add TrustSphere informarion; therefore a new **VisualForce Page** is used.

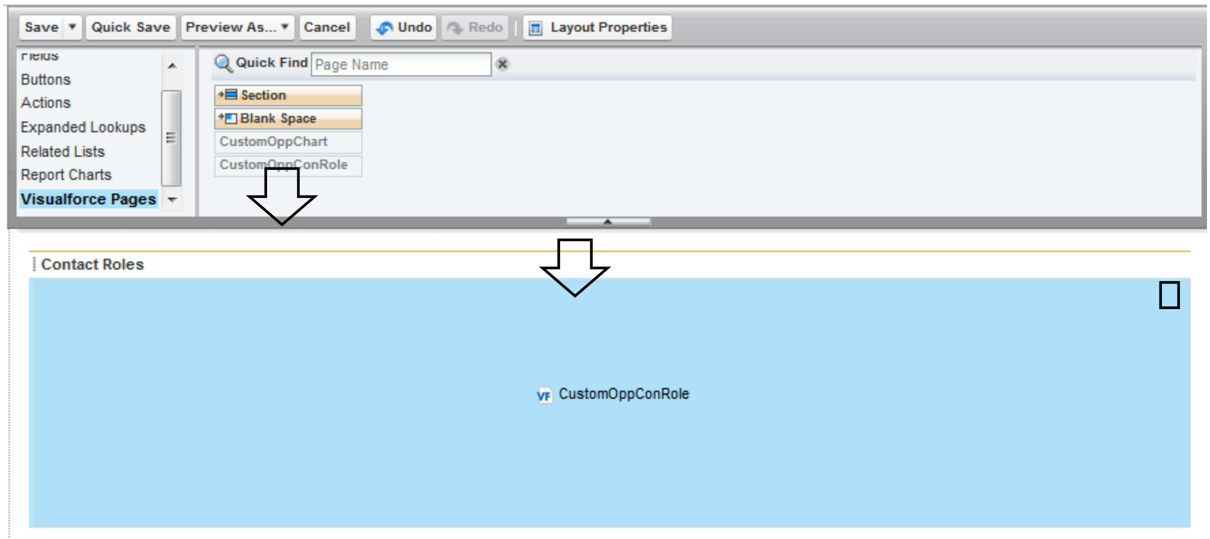
Important: due to this page requiring 'seeAllData' permissions in some salesforce instances, users may see a permissions error instead of the page. In this case do not deploy the page, or select the Tool icon on the **CustomOppConRole** and change the page properties setting the height to 0 pixels.



The page is displayed in the VisualForce pages section in the box. The fields on this page are pre-determined showing the following information:

Contacted By : The person in communication with the opportunity contact
Last Inbound : Summary indicator of inbound communication status
Last Outbound : Summary indicator of outbound communication status
History : Displays a list of messages sent and received with the contact

It is recommended to place page in a new section.



The existing opportunity contact role related list can be retained to allow further information to be displayed or deleted if preferred.

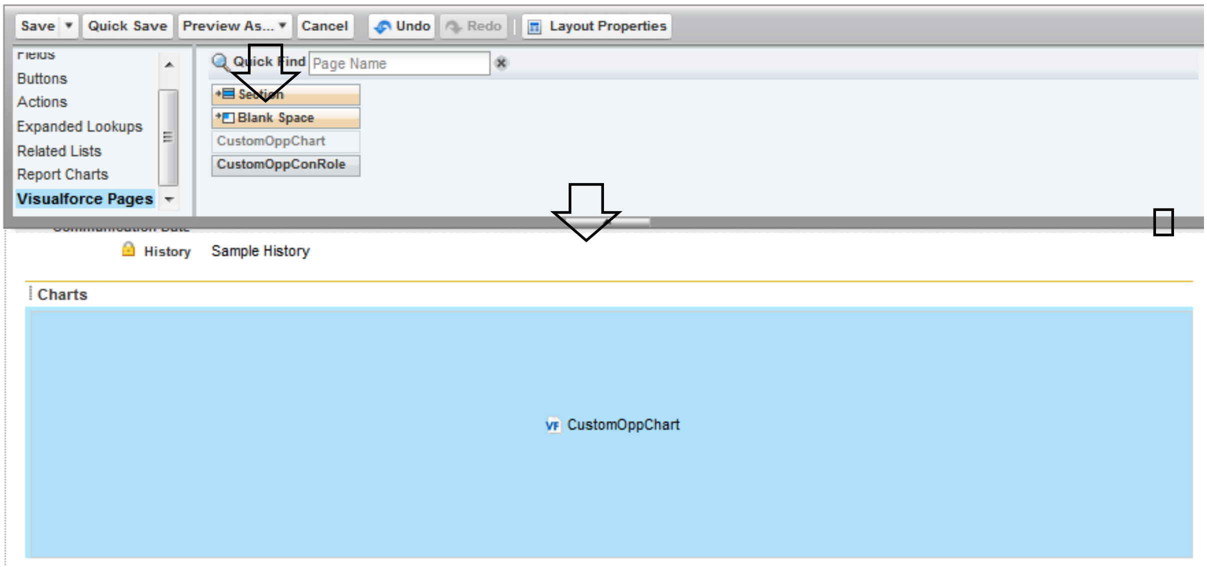
2.9.7.3 Summary Chart (Classic only)

The chart can be added to the detail section of page layouts.

The charts are displayed in the VisualForce pages section in the box, click and drag the **CustomOppChart** onto the page. It is recommended to create a section in the page for the chart so it can be resized

Charts

Volume : A bar chart of the inbound and outbound communication volume over the last twelve months.



When completed, save the updated layout.

Consider also updating the opportunities search layout to include the new information in search results and enable searching on the additional fields.

2.9.8 Opportunity Page Components for Lightning

Additional information can be displayed in lightning
Navigate through **Setup | User Interface | Lightning app builder | Contact record page | edit**

2.9.8.1 Summary chart

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **CustomConChart** visualforce page name from the list.
Label the page ‘Communication Volume’ and place on the page layout

2.9.8.2 Message history

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select 

and choose the **HistoricalTransactions** visualforce page name from the list.
Label the page ‘360 Degree Customer Interaction’ and place on the page layout

2.9.8.3 LinksWithin

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Componets list select Visualforce and choose the **LinksWithin** VisualForce page name from the list.
Label the page 'LinksWithin' and place on the page layout

2.9.8.4 Relationship graph

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **RelationshipGraph** VisualForce page name from the list.
Label the page 'Relationship graph' and place on the page layout

2.9.8.5 Contact roles

This can be added as a VisualForce page component to the Lightning page layout.

From the Lightning Components list select Visualforce and choose the **CustomOppConRole** VisualForce page name from the list.
Label the page 'Contact Role Activity' and place on the page layout

2.9.9 Other Components for Lightning

Additional components are available that can be placed on any page

2.9.9.1 Transition report

This can be added as a VisualForce page component to any Lightning page layout

From the Lightning Componets list select Visualforce and choose the **TransitionReport** visualforce page name from the list.
Label the page 'Transition report' and place on the page layout

This component will provide a popup to request the identification of the person for which the report will be created. The report will provide information for all communication related to the person.

Therefore, consider placing this component on a page and setting appropriate access controls.

2.10 Leveraging activity information

The additional activity information can be used to create new reports, workflow rules and alerts or used in custom fields to provide insights to existing information.

2.10.1 Sample Reports

The application provides three sample reports. Navigate to **Reports | TrustSphere**

Relationship Analysis report: provides a view of the current communication status with each account.

Account Activity By Owner report: provides a view of the current communication status of each account, grouped by the account owner.
It provides a breakdown of each account contacts current communication status.

Staff Account handover Report: similar to the previous report, it provides a list of all the account contacts grouped by the staff member that has been in communication.

Open Opportunity Contact Status Report: provides a view of open opportunity communication status, grouped by account and opportunity owner.
It provides a breakdown of each opportunity contacts current communication status.

2.10.2 Sample formulas

Including the activity information in existing or new fields can enhance the visibility of interactions in the CRM. The following examples show how the dynamic nature of interactions can be made visible.

Q. How many days has it been since your account was in communication?
Create a custom field on accounts, called **Days since last contact**. The field uses a formula and outputs a text value.

Put the following into the formula field
```
FLOOR(NOW() - trustvault__LastCommunicationDate__c)
```

Add the field to the account page, it shows the number of days the since the last communication to the account.

Q. How responsive are your accounts to your communication?
Create a custom field on accounts, called **responsiveness**. The field uses a formula and outputs a text value.
Put the following into the formula field

```
IF(ISBLANK(trustvault__LastCommunicationDate__c),
IMAGE("/resource/trustvault__Styles/images/d_black.png","Black",15,15),
IF(( trustvault__Last_OutboundDate__c - trustvault__Last_InboundDate__c ) <= 10
,IMAGE("/resource/trustvault__Styles/images/a_green.png","Green",15,15),
IF(AND((( trustvault__Last_OutboundDate__c - trustvault__Last_InboundDate__c ) <= 20 ),
(( trustvault__Last_OutboundDate__c - trustvault__Last_InboundDate__c ) > 90 )),
IMAGE("/resource/trustvault__Styles/images/b_yellow.png","Yellow",15,15),
IF(( trustvault__Last_OutboundDate__c - trustvault__Last_InboundDate__c ) > 90 ,
IMAGE("/resource/trustvault__Styles/images/d_black.png","Black",15,15),
IMAGE("/resource/trustvault__Styles/images/c_red.png","Red",15,15) ))))
```

Add the field to the account page, it shows a coloured indication of how responsive the account has been to the latest communication, or you have been to the account.

2.11 User Operation

The user does not need to manually log email communication with contacts or leads.
The application automatically provides the current email communication status for each contact, account, opportunity and lead.

The activity of individual relationships with contacts and leads is summarized to account and opportunity level.

This gives an overview that immediately identifies the cadence, velocity and cohesiveness of the dynamic relationships the local organization has with its accounts and opportunities.

The information is not restricted to local Salesforce users. Other relationships can be retrieved, providing a comprehensive picture of the communication from the local organization with the accounts.

Overview charts are provided that summaries the historical activity levels and the current status of the relationships.

The message subject log can be obtained for email conversations between individuals or to whole accounts and opportunities.

Previously hidden communication relationships with unknown leads or contacts can be discovered for accounts, and new leads or contacts created.

2.11.1 Activity status

To provide a visual clue to the status of the activity across multiple records status colors are used as follows:

Indicator	Activity level
🟢	Active communication
🟡	Paused communication
🔴	Inactive communication
⚫	No communication

2.11.2 Activity updates

On creation of new contacts, leads, accounts or opportunities the communication activity is set to default values.

Communication activity that occurs after the creation date is then added to the contact or lead. This option is chosen so that the information reflects the actual communication after the creation, which is especially important for opportunity monitoring.

If required, communication activity that occurred before the creation date can be retrieved by the administrator using the synchronization **recover** option (2.6.3).
This will update all communication activity during the requested period and not just information specific to the new contact, lead, account or opportunity.

3 Appendix A – Frequently Asked Questions (FAQ)

Q. Can I use HTTP instead of HTTPS for the TrustSphere connection
A. No, this is intentionally disabled. Salesforce consider the use of HTTP to be a breach of data security policy
Using HTTP transfers, information (including username and password) would be sent un-encrypted between Salesforce and TrustSphere .

Q. I can't connect to the TrustSphere service
A. Ensure the **remote site settings** are configured correctly in Salesforce

A. Check with the TrustSphere administrator that the correct credentials are configured in the **Service Credentials.**

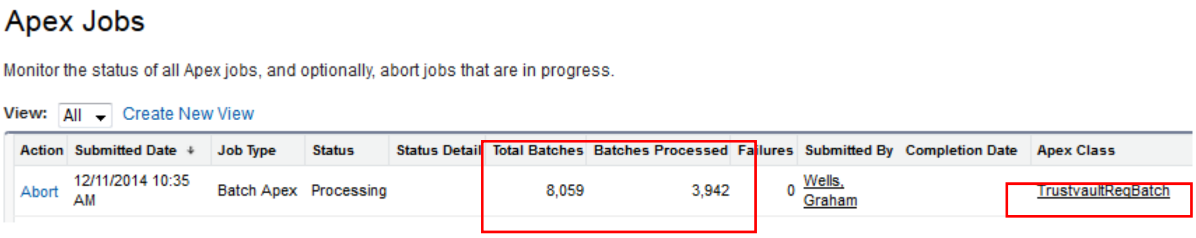
A. You may have a self-signed certificate for SSL installed in the TrustSpere service; Salesforce will only connect to services using certificates from these certificate authorities.

Contact TrustSphere support to help resolve the certificate issue.

Q. How long does initial synchronization take
A. The synchronization execution is dependent on the availability of Salesforce resources and the volume of email activity during the **recover** period.

In practice the first synchronization may take up to an hour, subsequent synchronization considerably less. However, if Salesforce is experiencing high load, this may take considerably longer as Salesforce can place the job in a queued state until resources are available.

The progress of synchronization can be monitored on the **APEX Jobs** page. Refer to **TrustVaultReqBatch** job and note the Total batches and Batches Processed values



Q. How long does scheduled synchronization take
A. The synchronization execution is dependent on the availability of Salesforce resources and the volume of email activity. The time taken is proportional to the volume of email activity since the last synchronization and typically takes several minutes only.

Q. I can't see the new fields on the page
A. You can add the new fields to your pages through the edit layout or edit columns options.
A. If using professional edition or below see advice in the page layout sections.

Q. Can I change the indicator colors
A. The colors themselves cannot be changed from 'red', 'green', 'amber' and 'black'. However the displayed color is determined by the indicator threshold values set in the **TrustSphere Setup** page.

Q. How do I find the latest information
A. The latest information is summarized automatically to the relevant account, opportunity, contact and lead sections added to the page layouts.

A. Individual communication to leads, contacts and opportunity contacts is automatically listed in additional related list sections added to the page layouts.

Q. My account does not show activity information
A. There is possibly no email communication for the account.

A. The account domain may be listed as an **Excluded Domain** in the **TrustSphere Setup**.

Q. I've just sent an email, but it does not appear in the information
A. The activity may not yet be updated to Salesforce. The latest activity date and time is shown on the **TrustSphere Setup** page.

A. Check the answers given above for information not showing

Q. I can only see information from the last … days
A. The number of days synchronized is set by **Recover** in the **TrustSphere Setup**. The information is then retained if active during the **Remove** period.

A. The TrustSphere service has not been running for more than (x) days. Restart the TrustSphere service and synchronization will continue normally.

Q. My opportunity status is not updated
A. There is no contact role defined for the opportunity, for which activity can be synchronized.

Q. The last sync time shown is in the past
A. This is normal. The last sync time notes the last time activity was updated from TrustSphere.

Q. The information for my contact or lead is missing
A. There is not an email address defined for the contact or lead.

A. The contact or lead email address is listed in the **Excluded addresses,** or the email domain in the **Excluded Domains** in the **TrustSphere Setup**.

A. The contact or lead has recently been created, but synchronization has not occurred. Wait for the next scheduled synchronization.

Q. My contact sent email from their Gmail or Blackberry address, but it is not shown
A. These account domains are probably listed in the **Excluded Domain** in the **TrustSphere Setup**. The administrator can remove the domains from the list.

Q. Contact or lead relationship information was shown but is now missing
A. The activity has been deleted or has been removed because it was in-active.
The administrator can require that In-active relationships are removed if no communication has occurred for the **Remove** period to free Salesforce data storage.

Disable or increase the **Remove** period; the information can be re-instated by setting the **recover** period and pressing the **recover** button.

Q. When is information removed
A. The **Remove** function runs as a scheduled job at 01:00am every day. It can be seen in the list of **Scheduled Jobs** under **Administration Setup, Data monitoring**.

Q. The installation fails with “External ID and Unique field limit exceeded”
A. The application cannot be installed as the number of existing fields marked as ExternalID or Unique has reached the Salesforce limit. To install the application request an increase in the limit from Salesforce (Section 2.8.2).

TrustSphere

4 Appendix B – Application Messages

Please configure the application first
Please enter valid configuration settings
The TrustSphere service credentials have not been set by the administrator.

Connection un-successful
Credentials are invalid
Credentials are missing
Check the service credentials against the TrustSphere welcome letter.

Unable to connect, please check the remote site setting
Ensure the Salesforce **Remote Site Settings** (section 2.5.2) are correctly configured and the TrustSphere service has an SSL certificate validated by a Salesforce accepted certificate authority.

Connection error (<code>)
An exception occurred trying to start synchronization
Unable to retrieve messages
Unable to retrieve information
Check the service credentials against the TrustSphere welcome letter, if correct please contact support@trustsphere.com for investigation.

Unable to create default settings for indicator / domains / application
Salesforce was unable to create new application settings. The data storage space has been exhausted. Check the **storage usage** and free some space before trying to save again.

Unable to stop scheduler, please retry
Unable to update scheduler, please retry
The application was unable to remove the scheduled job in order to update the time. The scheduled job limit may have been reached for the organization.

Unable to create scheduled job for removal
Unable to create scheduled job for synchronization
The application was unable to create a scheduled job for the remove feature. The scheduled job limit may have been reached for the organization.

Unable to save settings, please retry
The application could not update the saved settings. Try the save again.

5 Appendix C – Custom Fields and Lists

The custom fields and lists available to place on the pages are listed below.

Field	Description	Account	Opportunity	Contact	Lead	Contact Relationship	Lead Relationship	Opportunity Contact Role
Last Communication Date	Formula giving latest of inbound or outbound dates							
Last Contacted By / Contacted By	Formula giving email address or matching User							
Last Contacted By Email	Local user email address							
Last Contacted By User	User with local user email address							
Last in Date	Latest inbound date time							
last out Date	Lastest outbound date time							
Last Sync Time	Last update date time							
Status	Coloured indicator of last communication date							
History	Link to fetch messages page							
Other Relationships	Link to fetch relationships page							
LinksWithin	Link to fetch a LinksWithin page							
Last in Status	Coloured indicator of last in date							
Last out Status	Coloured indicator of last out date							
TrustScore	Relationship metric							
CountIn	Total of inbound							

Field	Description	Account	Opportunity	Contact	Lead	Contact Relationship	Lead Relationship	Opportunity Contact Role
	communication							
CountOut	Total of outbound communication							
MonthlyIn	Totals of inbound communication for January through December							
MonthlyOut	Totals of outbound communication for January through December							

- Account page – Summary fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the account	Useful to place in a summary section
Last Contacted By	Email addresses or User who was last in communication	Shows Last Contacted By Email or Last Contacted By User, if the email address matches a Salesforce user
Last Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Inbound Date	The date and time of the last communication received	Useful to place in a summary section
Last Outbound Date	The date and time of the last communication sent	Useful to place in a summary section
Last Sync Time	Indicates the time that new information was found in TrustSphere and updated (note: not the last time TrustSphere was asked for any updates)	Useful to place in a summary section to show information validity
Status	A coloured indicator showing communication status	Quick view of communication activity
History	A clickable icon	Opens a new page that lists the recent

Field	Description	Usage
		messages to and from the account.
Other Relationships	A clickable icon	Opens a new page that lists the active communication with others (non-account contacts)
LinksWithin	A clickable icon	Opens a new page that lists the persons in communication and the strength of the relationships

- Account Page – Related list

List	Description	Usage
Contacts	Adds summary information of communication with the contact	Shows whom in the organisation is the last in communication with the contact

- Account Page – VisualForce page

Page	Description	Usage
CustomAcctChart	Shows the pre-defined charts for monthly inbound and outbound and activity status	Provides a graphical overview of communication activity

- Account contact – Fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the account	Useful to add so that information can be sorted in descending order to place most recent communication first.
Contacted By	Email addresses or User who was last in communication	Identifies local person last in communication
Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Last Inbound Date	The date and time of the last communication received	Compare with Last Outbound Date to see if an email is waiting for a response
Last Outbound Date	The date and time of the last communication sent	Compare with Last Inbound Date to see if an email is waiting for a response
Status	A coloured indicator showing communication status	Quick view of communication activity

Field	Description	Usage
History	An icon that links to the communication history	Allows access to message history including subjects of communication

- Opportunity page – Summary fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the account	Useful to place in a summary section
Last Contacted By	Email addresses or User who was last in communication	Useful to place in a summary section
Last Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Inbound	The date and time of the last communication received	Useful to place in a summary section
Last Outbound	The date and time of the last communication sent	Useful to place in a summary section
Last Sync Time	Indicates the time that new information was found in TrustSphere and updated (note: not the last time TrustSphere was asked for any updates)	Useful to place in a summary section to show information validity
Status	A coloured indicator showing communication status	Quick view of communication activity
History	An icon that links to the communication history	Allows access to message history including subjects of communication

- Opportunity Page – VisualForce page

Page	Description	Usage
CustomOppConRole	Shows communication status with the opportunity contacts	Replace or use in addition to the existing contact role list
CustomOppChart	Shows the pre-defined charts for monthly inbound and outbound	Provides a graphical overview of communication activity

- Contact Page - Summary fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the contact	Useful to place in a summary section
Last Contacted By	Email addresses or User who was last in communication	Useful to place in a summary section
Last Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Inbound Date	The date and time of the last communication received	Useful to place in a summary section
Last Outbound Date	The date and time of the last communication sent	Useful to place in a summary section
Last Inbound	A coloured indicator showing inbound activity status	Quick view of communication activity
Last Outbound	A coloured indicator showing outbound activity status	Quick view of communication activity
Last Sync Time	Indicates the time that new information was found in TrustSphere and updated (note: not the last time TrustSphere was asked for any updates)	Useful to place in a summary section to show information validity
History	An icon that links to the communication history	Allows access to message history including subjects of communication
LinksWithin	A clickable icon	Opens a new page that lists the persons in communication and the strength of the relationships

- Contact Page – VisualForce page

Page	Description	Usage
CustomConChart	Shows the pre-defined charts for monthly inbound and outbound and activity status and relationship cohesiveness	Provides a graphical overview of communication activity

- Contact Page – Related list

List	Description	Usage
Contact	List of people in communication with	Shows whom in the organisation is in

List	Description	Usage
Relationship	the contact	communication with the contact

- Contact Relationship list – Fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the contact	Useful to add so that information can be sorted in descending order to place most recent communication first.
Contacted By	Email addresses or User who was last in communication	Identifies local person last in communication
Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Last Inbound	The date and time of the last communication received	Compare with Last Outbound Date to see if an email is waiting for a response
Last Outbound	The date and time of the last communication sent	Compare with Last Inbound Date to see if an email is waiting for a response
Status	A coloured indicator showing communication status	Quick view of communication activity
TrustScore	Relationship metric calculated by TrustSphere	Shows how cohesive the relationship is between the two parties
Count In	Total number of inbound messages	Provides a metric of communication activity
Count Out	Total number of outbound messages	Provides a metric of communication activity
Monthly In	Total number of inbound messages by month (Jan to Dec)	Provides a breakdown of communication activity over time
Monthly Out	Total number of outbound messages by month (Jan to Dec)	Provides a breakdown of communication activity over time
History	An icon that links to the communication history	Allows access to message history including subjects of communication

- Lead Page - Summary fields

Field	Description	Usage
Last Communication	The date of the last communication with the lead	Useful to place in a summary section

Field	Description	Usage
Date		
Last Contacted By	Email addresses or User who was last in communication	Useful to place in a summary section
Last Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Last Contacted By
Last Inbound Date	The date and time of the last communication received	Useful to place in a summary section
Last Outbound Date	The date and time of the last communication sent	Useful to place in a summary section
Last Inbound	A coloured indicator showing inbound activity status	Quick view of communication activity
Last Outbound	A coloured indicator showing outbound activity status	Quick view of communication activity
Last Sync Time	Indicates the time that new information was found in TrustSphere and updated (note: not the last time TrustSphere was asked for any updates)	Useful to place in a summary section to show information validity
History	An icon that links to the communication history	Allows access to message history including subjects of communication
LinksWithin	A clickable icon	Opens a new page that lists the persons in communication and the strength of the relationships

- Lead Page – VisualForce page

Page	Description	Usage
CustomLeadChart	Shows the pre-defined charts for monthly inbound and outbound and activity status and relationship cohesiveness	Provides a graphical overview of communication activity

- Lead page – Related lists

List	Description	Usage
Lead Relationship	List of people in communication with the lead	Shows whom in the organisation is in communication with the lead

- Lead Relationship list – Fields

Field	Description	Usage
Last Communication Date	The date of the last communication with the lead	Useful to add so that information can be sorted in descending order to place most recent communication first.
Contacted By	Email addresses or User who was last in communication	Identifies local person last in communication
Contacted By Email	Email addresses of non-Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Contacted By User	Salesforce user who was last in communication	Optional: expansion of the information in Contacted By
Last Inbound	The date and time of the last communication received	Compare with Last Outbound Date to see if an email is waiting for a response
Last Outbound	The date and time of the last communication sent	Compare with Last Inbound Date to see if an email is waiting for a response
Status	A coloured indicator showing communication status	Quick view of communication activity
TrustScore	Relationship metric calculated by TrustSphere	Shows how cohesive the relationship is between the two parties
Count In	Total number of inbound messages	Provides a metric of communication activity
Count Out	Total number of outbound messages	Provides a metric of communication activity
Monthly In	Total number of inbound messages by month (Jan to Dec)	Provides a breakdown of communication activity over time
Monthly Out	Total number of outbound messages by month (Jan to Dec)	Provides a breakdown of communication activity over time
History	An icon that links to the communication history	Allows access to message history including subjects of communication

6 Appendix D – Legal Notices

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