

Criminal Checker Post-Installation Setup Guide

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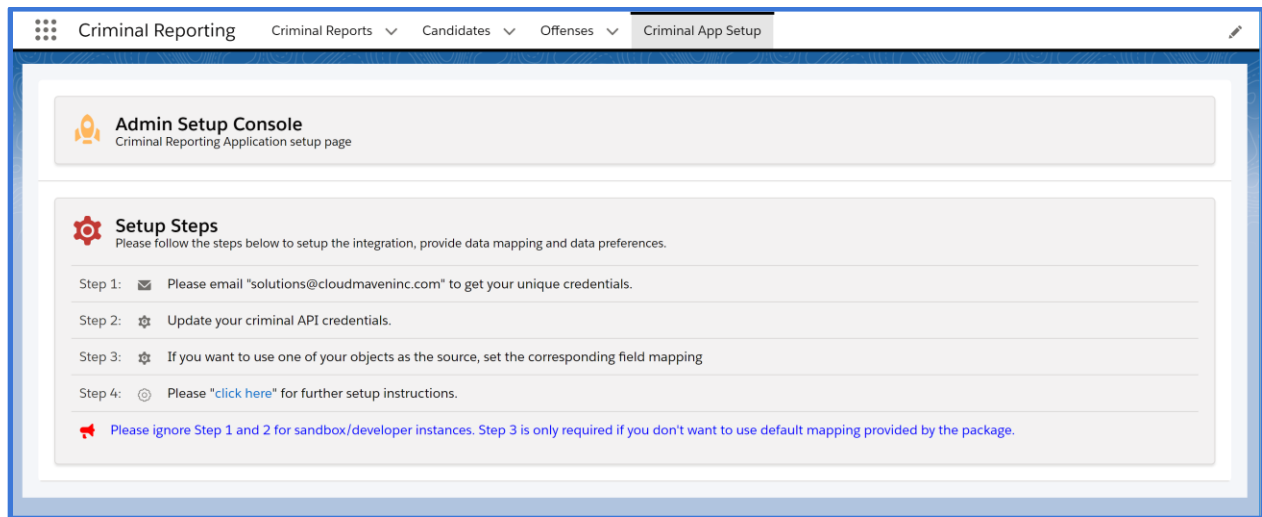
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1. Admin Console Setup:

Login to your Salesforce org where the package is installed.

Go to “Admin Console Setup” tab and read the instructions provided to **complete the setup**.



Follow the below steps:

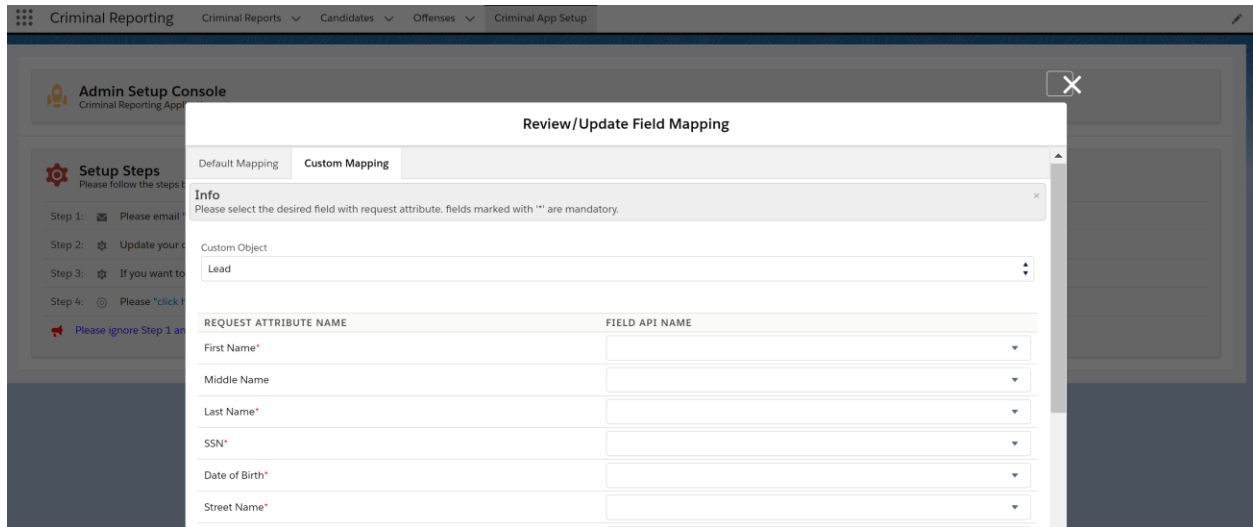
Step 1: Please email “solutions@cloudmaveninc.com” to get your unique Credentials for test and production.

Step 2: Click on the Gear Icon to update your API credentials and Credit report preferences.

1.1 Object Field Mapping

Step 3: If you want to use one of your objects as the source to run the credit report, set the corresponding field mapping as shown in the below screenshot.

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Admin Setup Console
Criminal Reporting App

Setup Steps
Please follow the steps to complete the setup.

- Step 1: Please email
- Step 2: Update your
- Step 3: If you want to
- Step 4: Please "click"

Please ignore Step 1 and Step 2

Review/Update Field Mapping

Default Mapping Custom Mapping

Info
Please select the desired field with request attribute. fields marked with "*" are mandatory.

Custom Object
Lead

REQUEST ATTRIBUTE NAME	FIELD API NAME
First Name*	
Middle Name	
Last Name*	
SSN*	
Date of Birth*	
Street Name*	

Note:

Step 3 is only required if you don't want to use default mapping provided by the package.

CRIMINAL
CHECKER

2. Required Fields

We need the following fields to pull the Criminal data from the states and counties. Please make sure you have these fields on your source object:

- First Name
- Last Name
- Social Security Number
- Street Address
- Zip/Postal Code
- State Code - ISOCode
- Country Code – CountryCode
- Date of birth

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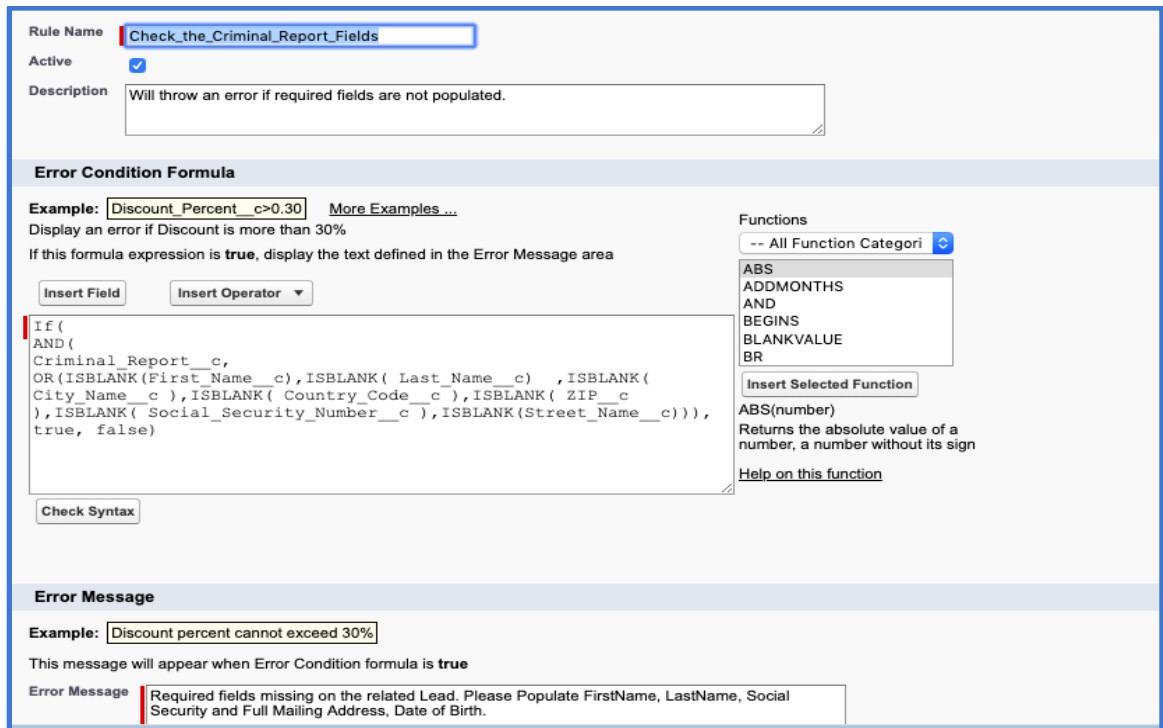
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- ix. *We recommend Creating a new field “Run Criminal Report” checkbox on the source object. This field will be used to validate when to run the criminal checker.*
- x. If your source object is different than Account, Opportunity, Lead & Contact. Please create a lookup field on the “Criminal Report” object and make your source object as the parent.

3. Validation Rules:

Please add a validation rule on the source object to ensure that required fields are present to run the credit report when the user checks the “Run Criminal Check” custom field as mentioned above in *step viii*. It’s advisable to change the fields as per your org configuration.



The screenshot shows the Salesforce Validation Rule configuration interface. The rule is named "Check_the_Criminal_Report_Fields" and is active. The description is "Will throw an error if required fields are not populated." The error condition formula is: `If ( AND ( Criminal_Report__c, OR ( ISBLANK ( First_Name__c ), ISBLANK ( Last_Name__c ), ISBLANK ( City_Name__c ), ISBLANK ( Country_Code__c ), ISBLANK ( ZIP__c ), ISBLANK ( Social_Security_Number__c ), ISBLANK ( Street_Name__c ) ), true, false )`. The error message is: "Required fields missing on the related Lead. Please Populate FirstName, LastName, Social Security and Full Mailing Address, Date of Birth." The interface includes a "Functions" panel on the right with a list of functions: ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, and BR. The "Error Message" section shows an example: "Discount percent cannot exceed 30%".

You can copy and paste the below configuration based on your source object. Modify as per your source object and replace the source fields.

Example - **Validation Rule for Contact:** Please make sure to replace the fields with your source fields.

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```
If(  
AND(  
Run_Criminal_Report__c,  
OR(ISBLANK(FirstName),ISBLANK(LastName),ISBLANK(MailingCity),ISBLANK(MailingCountry),ISBLANK(MailingPostalCode),ISBLANK(Text(MailingStateCode)),ISBLANK(Social_Security_Number__c),ISBLANK(MailingStreet))), true, false)
```

Example - **Validation Rule for Accounts:** *Person/Individual Account (Please make sure to replace the fields with your source fields)*

```
If(  
AND(  
Run_Criminal_Report__c,  
OR(ISBLANK(FirstName),ISBLANK(LastName),ISBLANK(BillingCity),ISBLANK(BillingCountry),ISBLANK(BillingPostalCode),ISBLANK(Text(BillingStateCode)),ISBLANK(Social_Security_Number__c),ISBLANK(BillingStreet))), true, false)
```

Example - **Validation Rule for Leads:** *Please make sure to replace the fields with your source field*

```
If(  
AND(  
Run_Criminal_Report__c,  
OR(ISBLANK(FirstName),ISBLANK(LastName),ISBLANK(BillingCity),ISBLANK(Country),ISBLANK(PostalCode),ISBLANK(Text(StateCode)),ISBLANK(Social_Security_Number__c),ISBLANK(Street))), true, false)
```

Validation Rule Message *(You can configure or change it as per your requirements):*

Required fields are missing on the related contact. Please populate First Name, Last Name, Social Security Number and Full Mailing Address.

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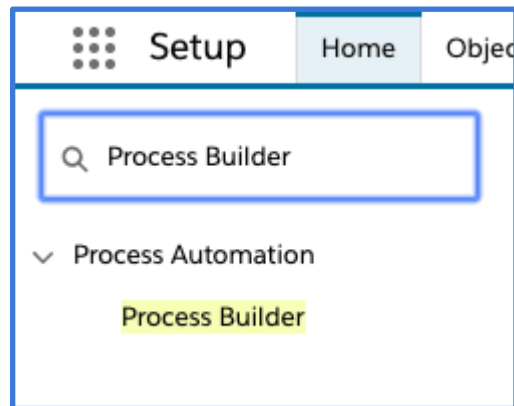
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4. Automating Criminal Checks:

To automate credit report, **create a process builder** on your source object (lead, contact, opportunity, account or any other object). Using this step, the system will automatically create and run the credit report.

Please follow the below steps:

- Go to Setup >> Search for process builder in Quick Find Box (shown below)



4.1. Process to Create Credit Report:

Enter the below fields to create the report:

- Process Name (Process name can be anything, set it according to your preference) Ex: Create Credit Report
- API Name
- Description
- “The process starts when” field Identifies when the process begins. Select when “A record changes” (*See below screen shot for reference*)
- Click on save.

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New Process

Process Name *

Create Criminal Report

API Name * ⓘ

Create_Criminal_Report

Description

This flow is responsible for creating Criminal Report.

The process starts when *

A record changes ▼

Cancel

Save

4.2. Adding Object for Run Criminal Check

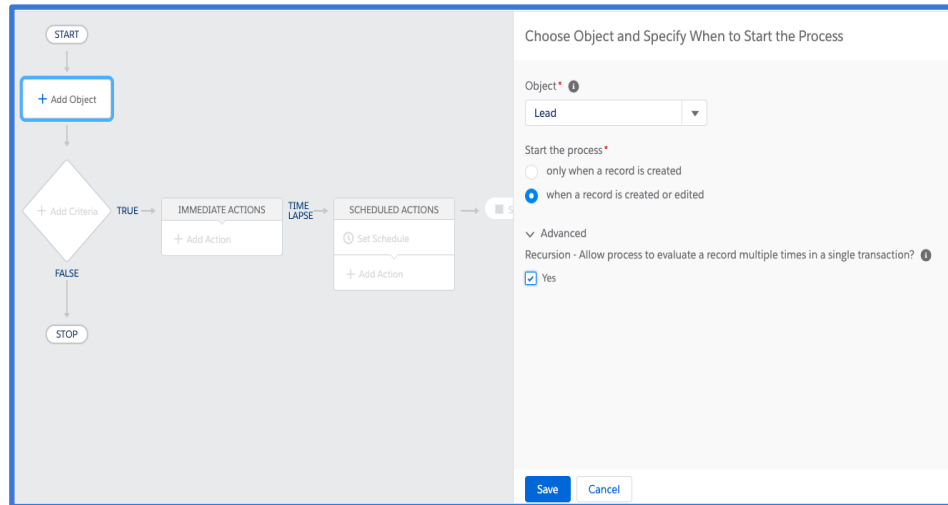
- Click “Add Object” button and choose the Object from the drop down (Object is the one from where you want to run your Criminal Checks)
- Select the appropriate radio button for “Start the process” option. Preferably, select “when a record is created or edited”.
- Before saving your changes, confirm the selections you have done because you can’t change the object after you save it.
- Click on save.
- To show you an example, in the below screenshot, a Lead has been created.

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Note – Make sure to select your source object.

4.3 Adding Criteria for Run Criminal Check:

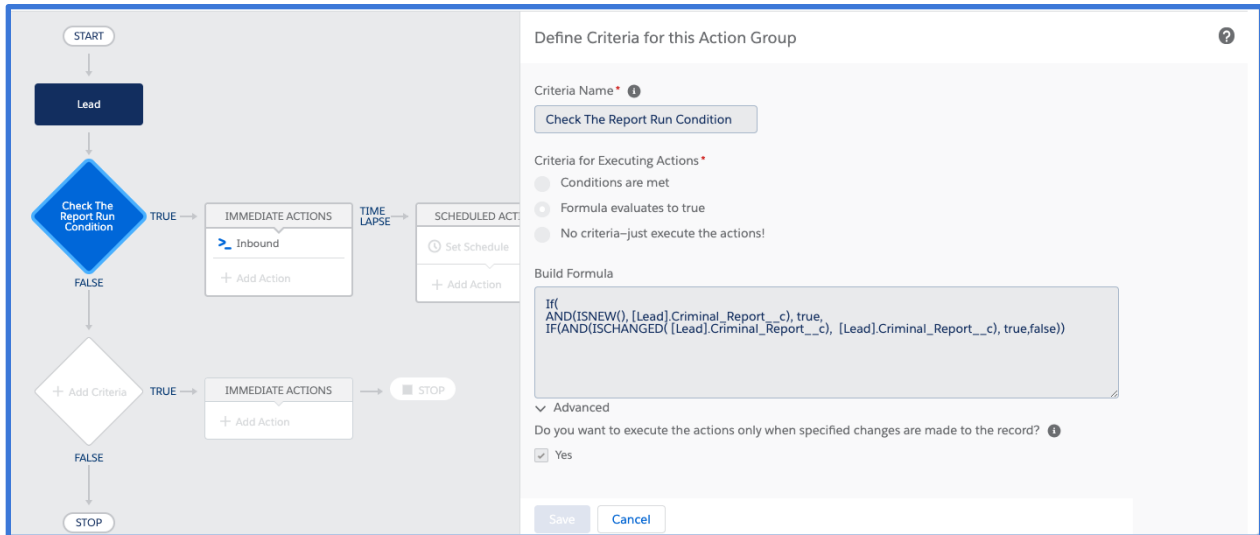
- Provide a Criteria Name (Name is according to your choice and preference) as shown in the below screenshot.
- Select the criteria for executing actions as per your need. To add matching Conditions - *always select “Conditions are met”* option.
- Provide the formula for evaluation. We recommend using an ID or other fields that uniquely identifies records so that the process can pick exactly one record.
- Click on Save.

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4.4 Defining Actions for Run Credit Check:

- Action Type- “Select Apex”.
- Action Name - Provide a unique name
- Apex Class - Select “Create Criminal Report Record”

Set Apex Variables

- Click on + button to “Add Row”
- Field - Select “listIds”
- Type - Select field reference.
- Value - Select source object Id field.
- **Activate the process builder.**

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Call Apex ?

Action Name * i

Inbound

Apex Class * i

Auto Create Criminal Report Rec...

Set Apex Variables

Field *	Type *	Value *
listIds	Field Reference▼	[Lead].Id Q

Save Cancel

CHECKER

5. Automating Criminal Check

In this step, we are going to create another Process Builder on Criminal Report Object. Using this process, the system will automatically perform the criminal check.

From Setup, enter Builder in the Quick Find box(same as you have done earlier) and select Process Builder.

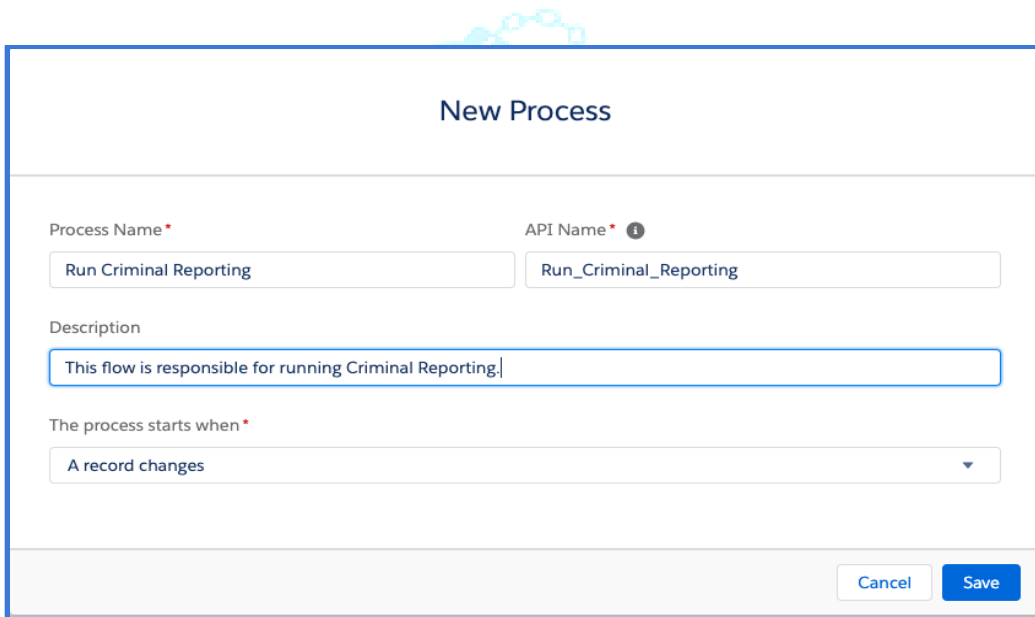
Click New.

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5.1 Setting Up Process Builder

Provide the below fields:

- Process Name. Example – “Automatically run a criminal report”.
- API Name
- Description
- “This process starts when” field Identifies when the process begins. Select when “A record changes”
- Click add an object. Select “Criminal Report”.
- Start the process select “when a record is created or edited”.
- Before saving the changes, please confirm because you can’t Undo the object after you save it.



The image shows a screenshot of the 'New Process' form in Salesforce. The form has a title bar 'New Process' and a light blue cloud icon. It contains four main input fields: 'Process Name' with the value 'Run Criminal Reporting', 'API Name' with the value 'Run_Criminal_Reporting', 'Description' with the value 'This flow is responsible for running Criminal Reporting.', and 'The process starts when' with a dropdown menu showing 'A record changes'. At the bottom right, there are 'Cancel' and 'Save' buttons.

New Process	
Process Name *	API Name * ⓘ
Run Criminal Reporting	Run_Criminal_Reporting
Description	
This flow is responsible for running Criminal Reporting.	
The process starts when *	
A record changes ▼	
Cancel Save	

5.2 Adding Object for Credit Pull Process:

To add an object, choose the object and specify when to start the process. Follow the below steps:

1. Choose the Object from the drop down – “Criminal Report”

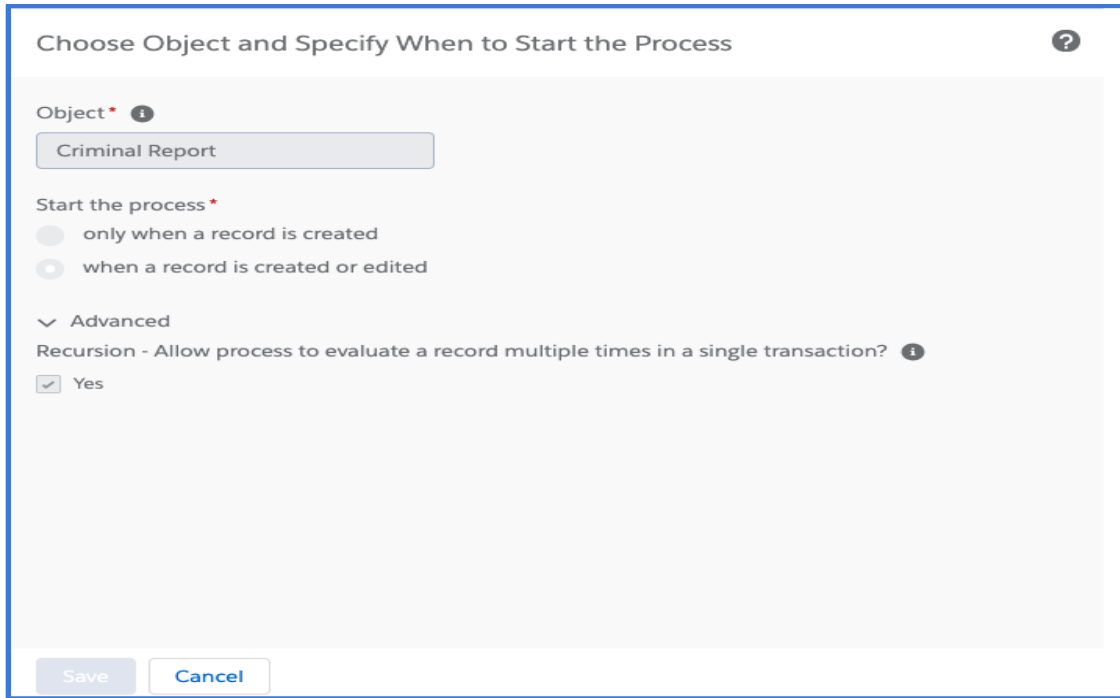
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2. "Select "Start the process" field as "when a record is created or edited"
3. Expand Advanced option and select "yes" checkbox under Recursion.
4. Click Save button.



The screenshot shows a dialog box titled "Choose Object and Specify When to Start the Process". It contains the following fields and options:

- Object:** A dropdown menu with "Criminal Report" selected.
- Start the process:** Two radio button options: "only when a record is created" (unselected) and "when a record is created or edited" (selected).
- Advanced:** A collapsed section containing:
 - Recursion - Allow process to evaluate a record multiple times in a single transaction?** A checkbox labeled "Yes" which is checked.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

5.3 Adding Criteria for criminal check Process:

To add criteria for criminal check process, follow the below steps:

- Provide Trigger Name
- Add "Matching Conditions" - always select "Conditions are meet" option.
Provide the formula for evaluation.
 - Status = "Not Requested"

5.4 Defining Action for criminal check Process.

Defining an action for criminal pull process can be done using below steps :

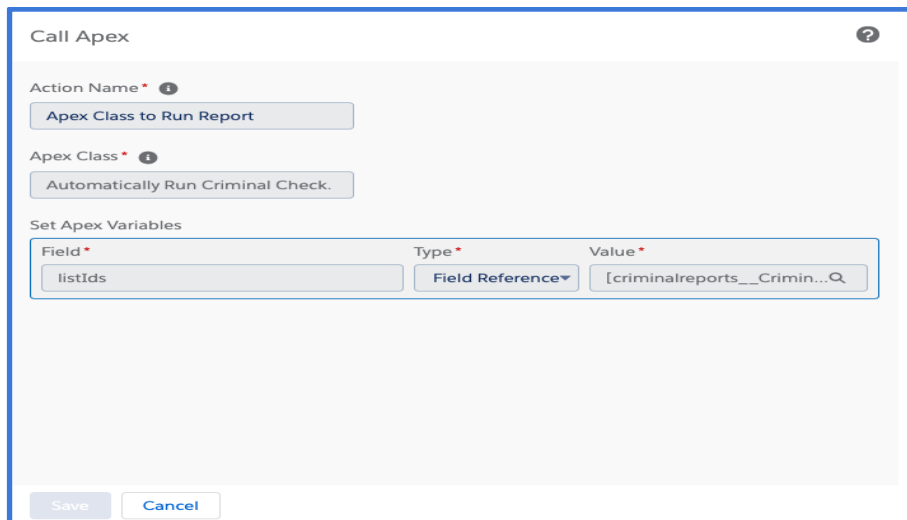
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- Action Type - “Select Apex”
- Action Name - Provide a unique name
- Apex Class - Select “**Automatically Run Criminal Reports**”
- Set Apex Variables
 1. Select “Add Rows”
 2. Field - Select “listIds”
 3. Type - Select field reference.
 4. Value - Select object Id Field.
 5. Screenshot is provided below for the reference.



Call Apex

Action Name * ?

Apex Class to Run Report

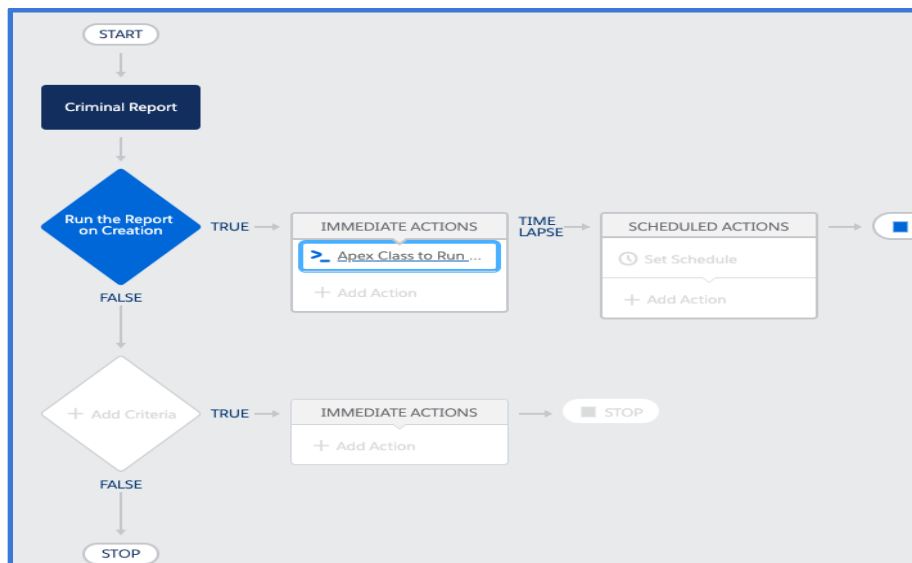
Apex Class * ?

Automatically Run Criminal Check.

Set Apex Variables

Field *	Type *	Value *
listIds	Field Reference	[criminalreports__Crimin...]

Save Cancel



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- **Activate the process builder.**

6. Assign App permissions

Assign the following permission set to desired users. This is required for the users to run and see the criminal check.

- Criminal Reporting - Generic User

7. Point the application to production server

By default, the application is pointing to the Test server. Use the below navigation to change the custom setting to point your Salesforce instance to "Production" server.

Setup >> Custom Setting >> Select "Common Setting" >> Manage >> ApiInstance

- ✓ Use "**Test**" to point to test server
- ✓ Use "**Production**" to point to the production server. This value should be set of live/production criminal check.

Your Installation is now complete, Please use the below test data testing.

8. Test Data

Except use below Name with any date of birth and valid US address. Pass "123456789" for Social Security Number.

- Jonathan Consumer
- David Morgan

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- Harold Chuang
- Ruth Brandis
- Jorge Akkaya
- William Bornstein
- Jennifer Ray
- James Bergman

If you have any Queries regarding the app and any problem feel free to write to us at support@cloudmaveninc.com.

Thank You for choosing us

