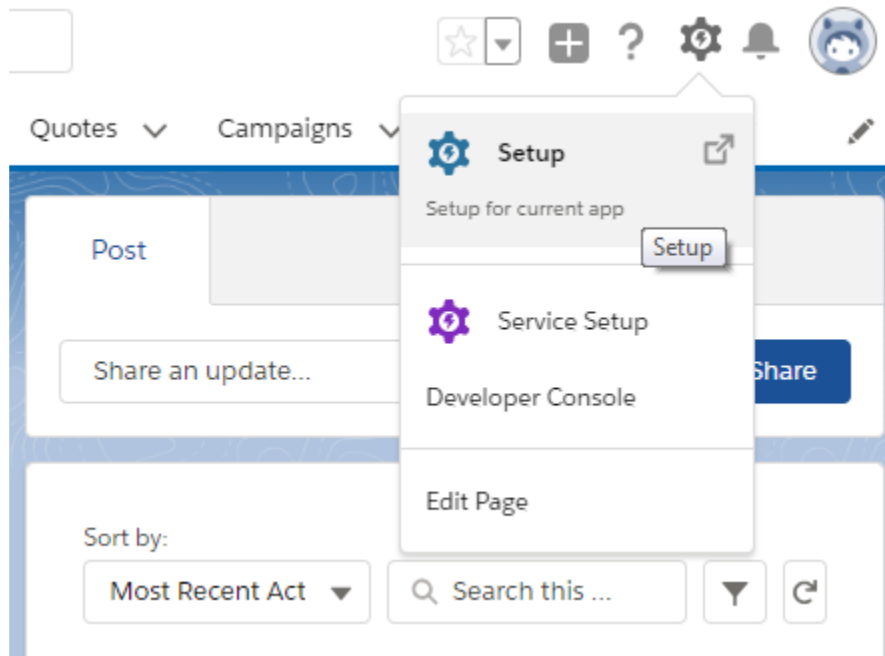
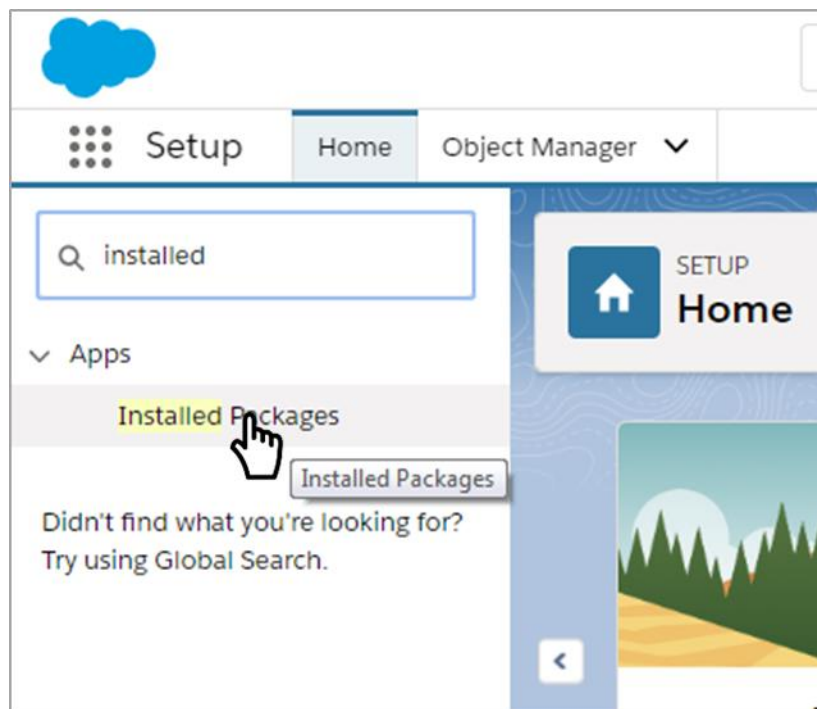


How to assign ProsperVue licenses to users

Step 1: Go to Setup.



Step 2: In the Quick Find box, type “Installed Package”, and click on “Installed Packages” below.



Step 3: Click on Manage Licenses next to Valgen cfMAPP (the package name for ProsperVue).



SETUP
Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into y Packages.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially mark allows you to test and customize before deploying. You can deploy the components individually using the othe

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall Manage Licenses 	ValgencfMAPP	Valgen.Inc	2.2	ValgencfMAPP
Description cfMAPP: Maps, Mapping and GeoAnalytics Made Smarter!				

Step 4: Click on Add User.



SETUP
Package Manager

Package Details

ProsperVue

[Back to Previous Page](#)

Package Name	ProsperVue	Publisher	Valgen.Inc
Status	Active	Allowed Licenses	12
Expiration Date	5/11/2019	Used Licenses	2

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T

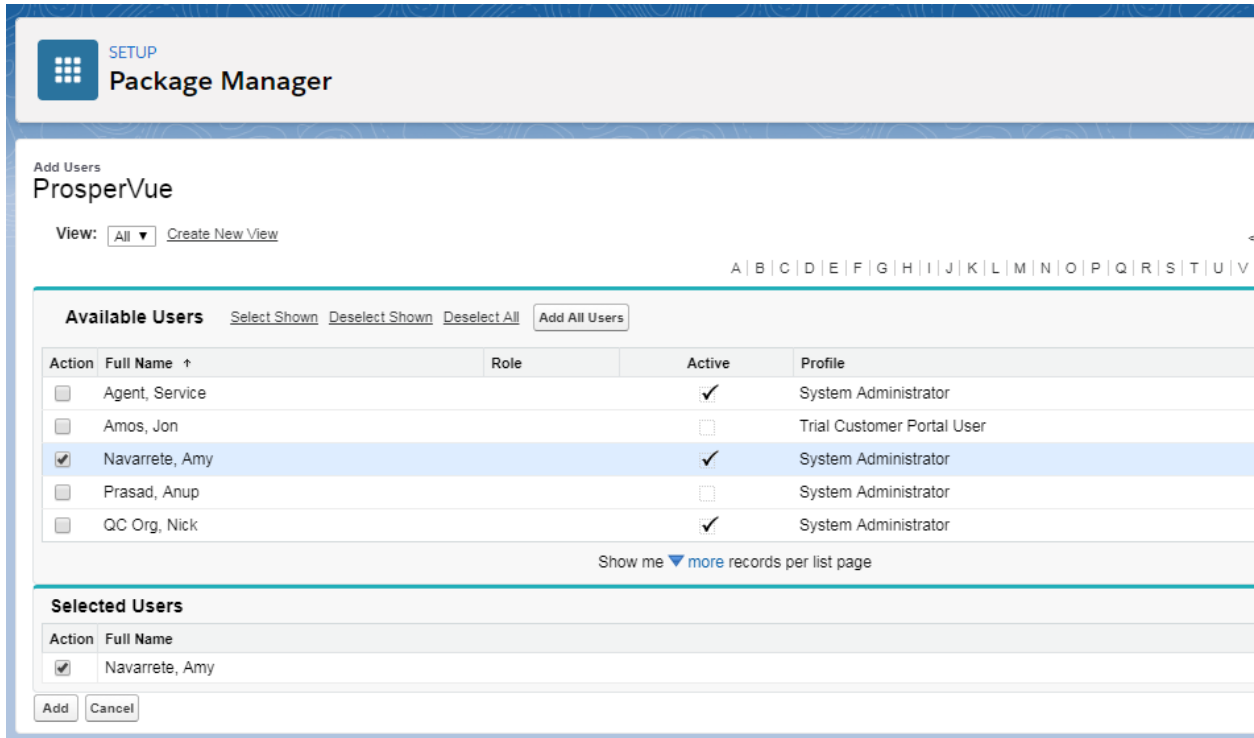
Licensed Users

[Add Users](#)
[Remove Multiple Users](#)

Action	Full Name ↑	Role	Active	Profile
Remove	Kunchala, Srikanth	SVP Customer Experience	✓	System Administrator
Remove	Srinivasa QC, Parth		✓	System Administrator

Step 5: Click on the user, or if long list then letter for the last name of the user. Then check the box to the left of each user you want to add, and click Add at the bottom, under Selected Users.

If you don't see all users, click on the "more" hyperlink.



SETUP Package Manager

Add Users
ProsperVue

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name ↑	Role	Active	Profile
☐	Agent, Service		✓	System Administrator
☐	Amos, Jon		☐	Trial Customer Portal User
☒	Navarrete, Amy		✓	System Administrator
☐	Prasad, Anup		☐	System Administrator
☐	QC Org, Nick		✓	System Administrator

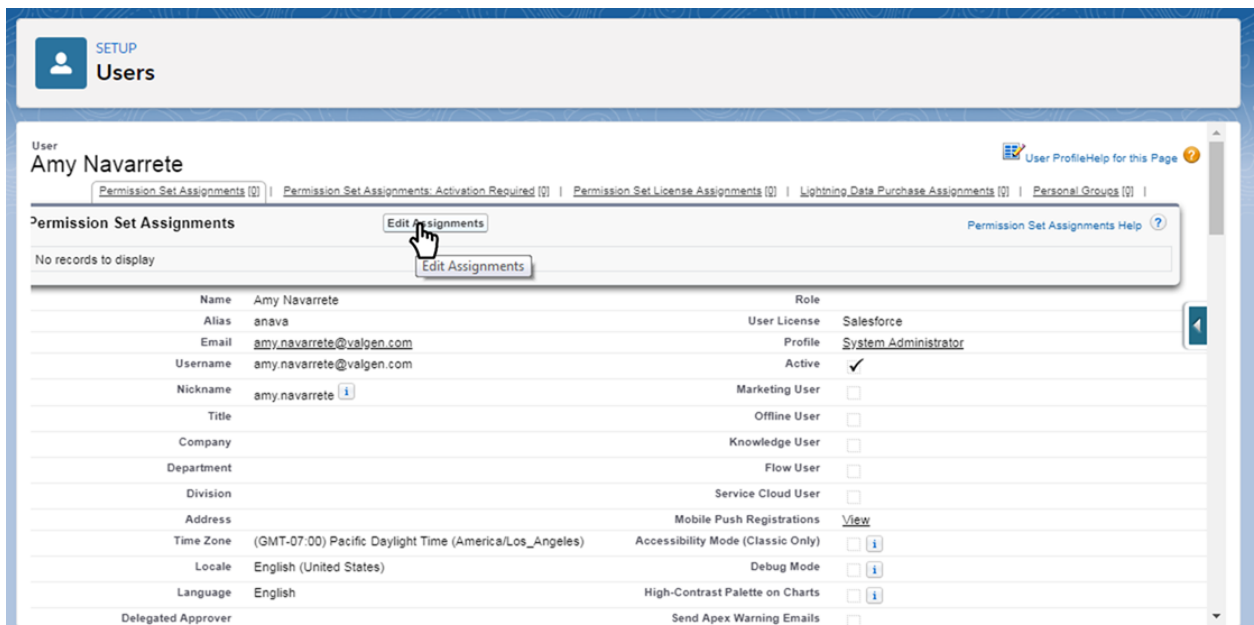
Show me [more](#) records per list page

Selected Users

Action	Full Name
☒	Navarrete, Amy

[Add](#) [Cancel](#)

Step 6: Now Go to Active users, and click on the Full Name of user(s) you just added. Mouse over on Permission Set Assignments, and click on Edit Assignments.



SETUP Users

User
Amy Navarrete

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set License Assignments](#) | [Lightning Data Purchase Assignments](#) | [Personal Groups](#)

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help](#)

No records to display

Name	Amy Navarrete	Role	
Alias	anava	User License	Salesforce
Email	amy.navarrete@valgen.com	Profile	System Administrator
Username	amy.navarrete@valgen.com	Active	✓
Nickname	amy.navarrete	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Mobile Push Registrations	View
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	☐ i
Locale	English (United States)	Debug Mode	☐ i
Language	English	High-Contrast Palette on Charts	☐ i
Delegated Approver		Send Apex Warning Emails	☐

Step 7: From the Available column, select “ProsperVue Permission Set”, add to Enabled column and click on Save.

Permission Set Assignments

Amy Navarrete

Available Permission Sets

- Pardot
- Pardot Connector User
- Pardot Integration User
- Password Never Expires
- ProsperVuePermissionSet**
- Record Creation Create Date Change
- Remove Chatter Permissions
- Rollup Helper - All Access
- SCB Administrator Salesforce
- SCB Administrator Salesforce - Platform

Enabled Permission Sets

- Assign Leads
- Contest Participant Salesforce
- SDR Opportunity and Contact Create Permission
- Scorecard User
- inContact Agent Permission

Step 8: Go to Active Users, and login as that user to confirm their access to ProsperVue

SETUP

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

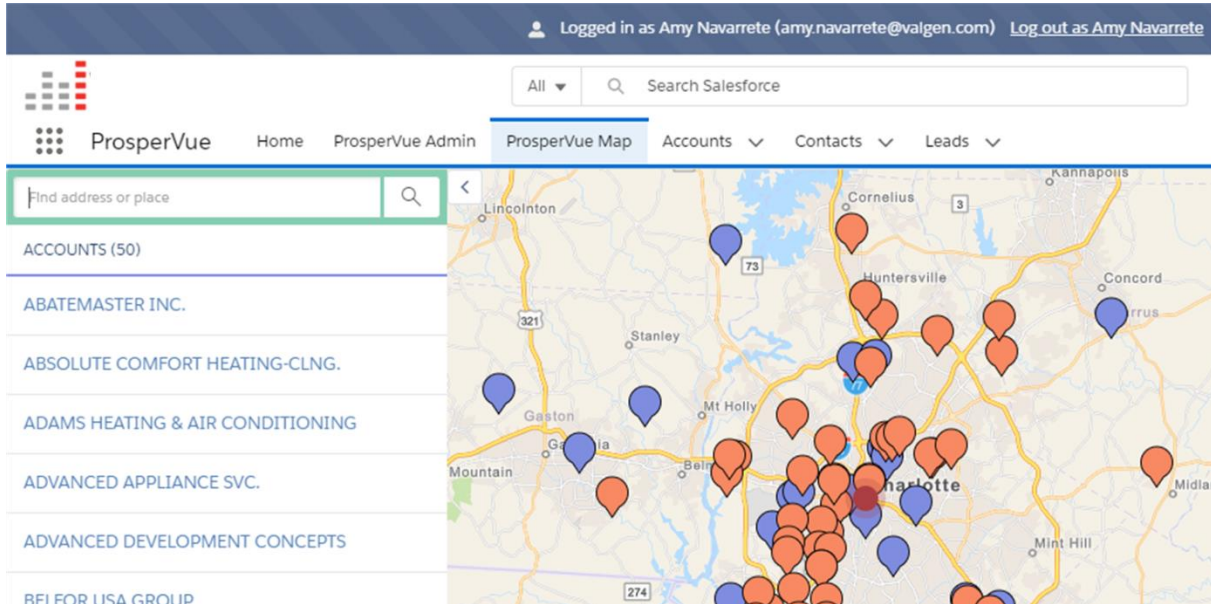
View: All Users [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New User
Reset Password(s)
Add Multiple Users

Action	Full Name ↑	Alias	Username	Email	Last Login	Role	Active	Profile
☐ Edit Login	Agent Service	sagent	agent.bh1emacumvbm.uo89kf3eu6i@valgen.com.gc	serviceagent2013@example.com			☒	System Administrator
☐ Edit	Amos Jon	jamos	info.inxqxf68zham.rc5hcsulqotf@valgen.com.gc	info@example.com			☐	Trial Customer Portal User
☐ Edit	Chatter Expert	Chatter	chatty.00d1u000000s72uuag.hqgb7pofxmp@chatter.salesforce.com	noreply@chatter.salesforce.com			☒	Chatter Free User
☐ Edit Login	Kunchala Srikanth	SKunc	srikanth.k@valgen.com.gc	srikanth.k@valgen.com	5/2/2019 9:29 PM	SVP Customer Experience	☒	System Administrator
☐ Edit Login	Navarrete Amy	anava	amy.navarrete@valgen.com	amy.navarrete@valgen.com	4/30/2019 8:02 AM		☒	System Administrator
☐ Edit	gin - Record 5 - Navarrete, Amy		crasad@valgen.com.gc1	anuc.crasad@valgen.com	1/16/2019 2:51 AM		☐	System Administrator

Step 9: Confirm that the ProsperVue app is available to that user.



Logged in as Amy Navarrete (amy.navarrete@valgen.com) Log out as Amy Navarrete

Search Salesforce

ProsperVue Home ProsperVue Admin ProsperVue Map Accounts Contacts Leads

Find address or place

ACCOUNTS (50)

ABATEMASTER INC.

ABSOLUTE COMFORT HEATING-CLNG.

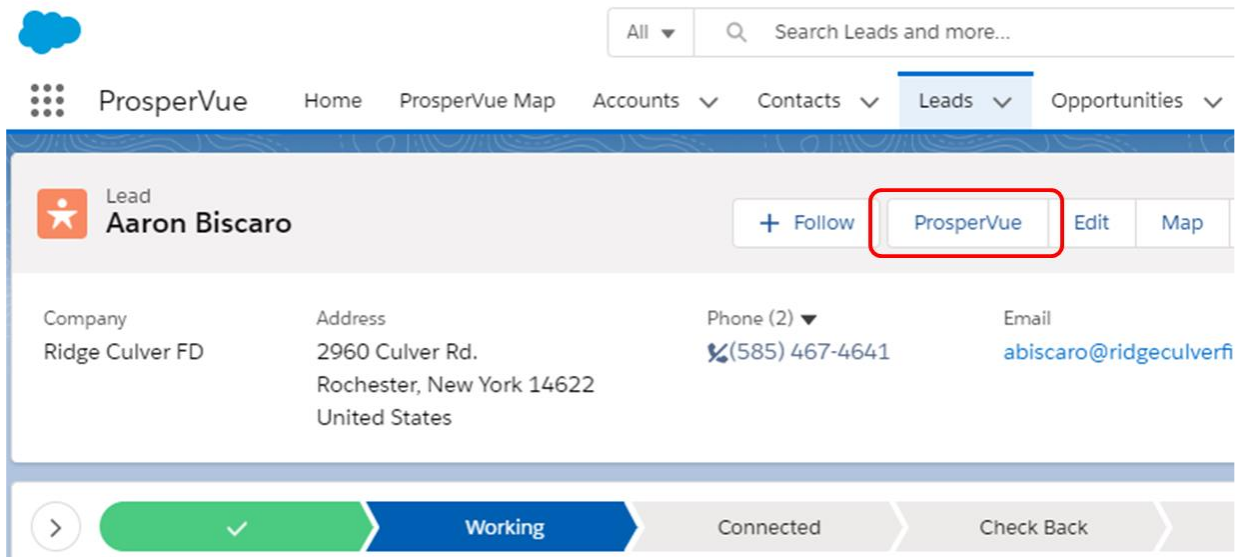
ADAMS HEATING & AIR CONDITIONING

ADVANCED APPLIANCE SVC.

ADVANCED DEVELOPMENT CONCEPTS

BELFOR USA GROUP

Step 10: Go to page layout for the object, confirm ProsperVue button is visible (click to see the map).



Search Leads and more...

ProsperVue Home ProsperVue Map Accounts Contacts Leads Opportunities

Lead
★ Aaron Biscaro

+ Follow ProsperVue Edit Map

Company: Ridge Culver FD
Address: 2960 Culver Rd.
Rochester, New York 14622
United States
Phone (2): (585) 467-4641
Email: abiscaro@ridgeculverfd.com

> Working Connected Check Back

That's it! You've empowered more users with ProsperVue!