

## **Salesforce App Install & Admin Guide**

The Corporate Gift for Salesforce App allows companies to gift as part of their business process. Here are a few fundamental features of the App -

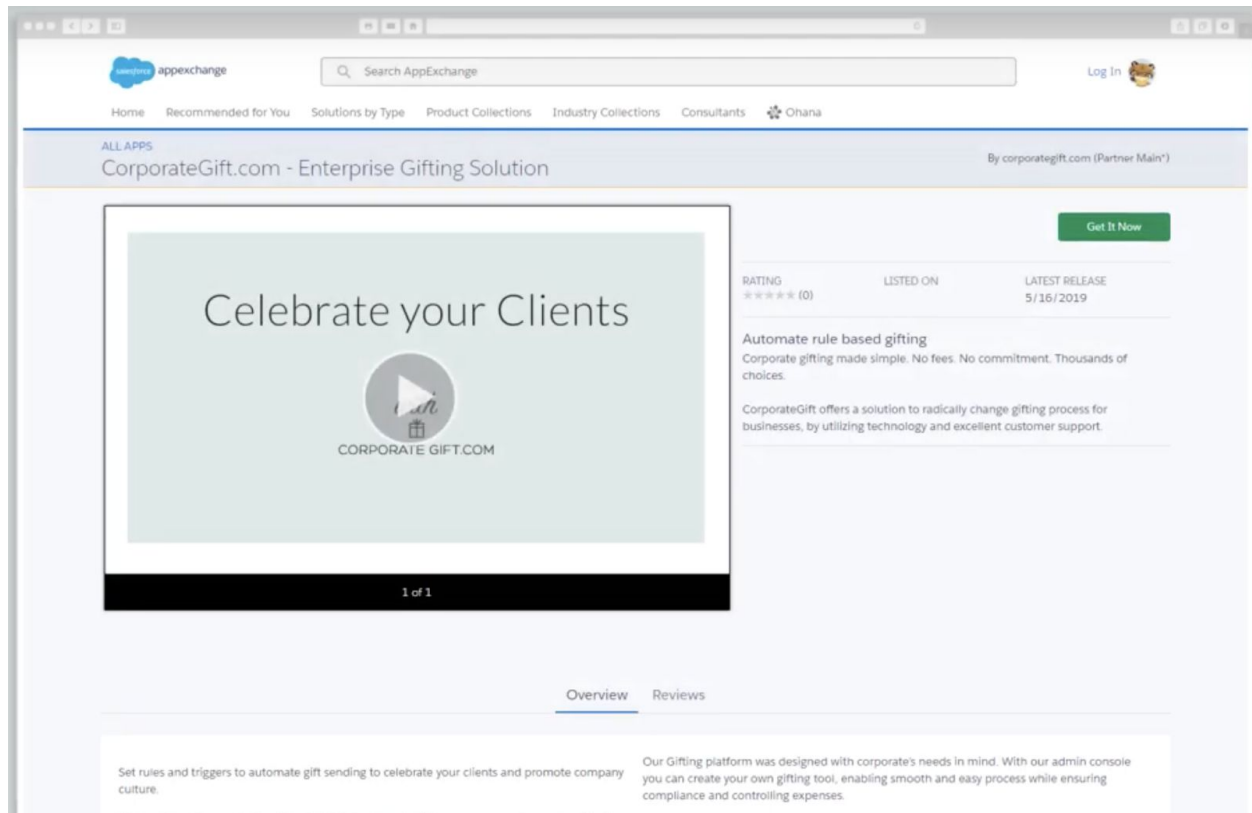
- Send Gifts and eGifts from Salesforce to Leads, Contacts, and Accounts
- Mass gifting - Send gifts to Leads/Contacts List View
- View Gift status from Salesforce
- Use Process Builder to automate gifting completely or create a task to send a gift
- Create an Approval Process to manage and track gifting
- Full gifting history
- Gifting Analytics - Use Salesforce reports and dashboards
- More!

**Let's Start!**

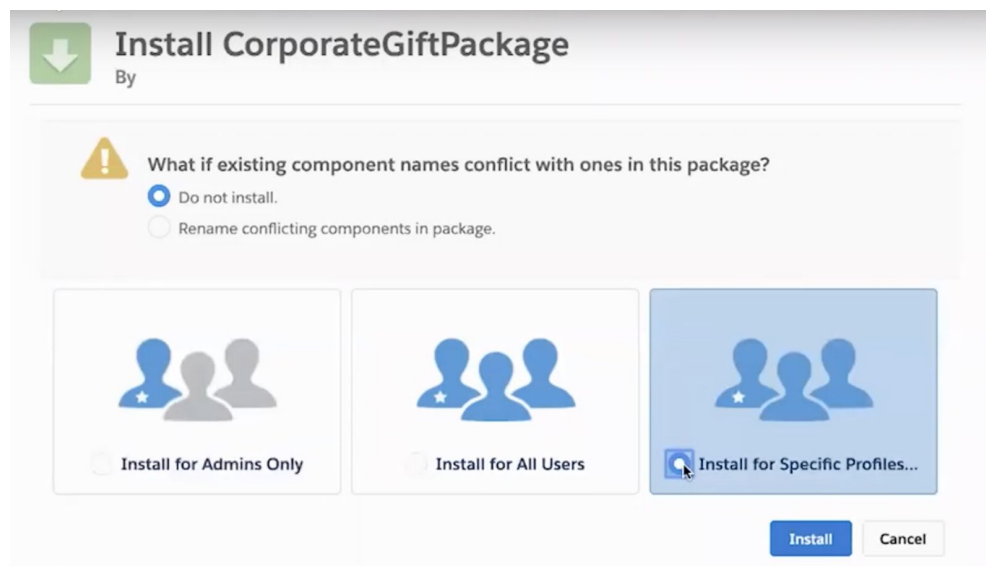
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## How To Install the App -

1. Open a browser Tab and Navigate to - <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FnCSiUAN>
2. Click on '**Get It Now**' and follow the instructions provided by Salesforce

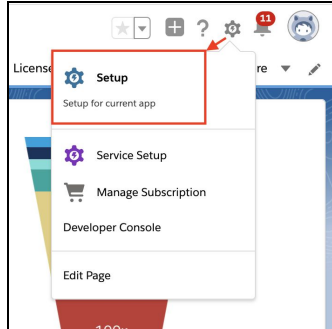


3. Choose whether you wish to install the App for all users or certain profiles only



## App Configuration

1. Click on 'Setup' -



2. Using the left search box, search for "Remote Site Setting" and click on "Remote Site Setting" then click on "New Remote Site".

Remote Site Details [Help for this Page](#)

[« Back to List: Remote Site Settings](#)

**Remote Site Detail** [Edit](#) [Delete](#) [Clone](#)

|                           |                                       |             |                                       |
|---------------------------|---------------------------------------|-------------|---------------------------------------|
| Remote Site Name          | GiftSend                              | Modified By | shivani.chaudhary, 1/28/2020, 5:43 AM |
| Remote Site URL           | https://corporategift.com             |             |                                       |
| Disable Protocol Security | <input type="checkbox"/>              |             |                                       |
| Description               |                                       |             |                                       |
| Active                    | <input checked="" type="checkbox"/>   |             |                                       |
| Created By                | shivani.chaudhary, 1/28/2020, 3:41 AM |             |                                       |

[Edit](#) [Delete](#) [Clone](#)

3. On the next window, Fill the -
  - 'Remote Site Name' = Giftsend
  - 'Remote Site URL' = https://corporategift.com
  - Click on "Save".

All Remote Sites [Help for this Page](#)

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

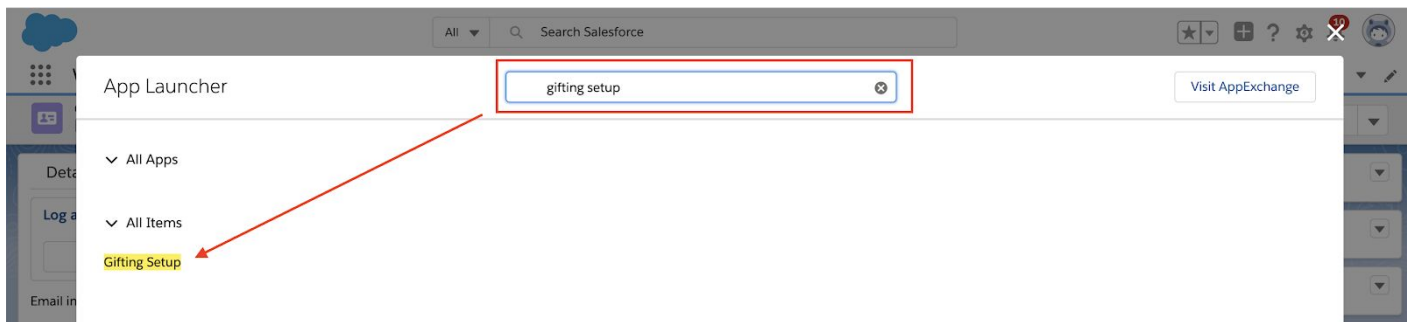
View: [All Remote Sites](#) [Create New View](#)

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](#)

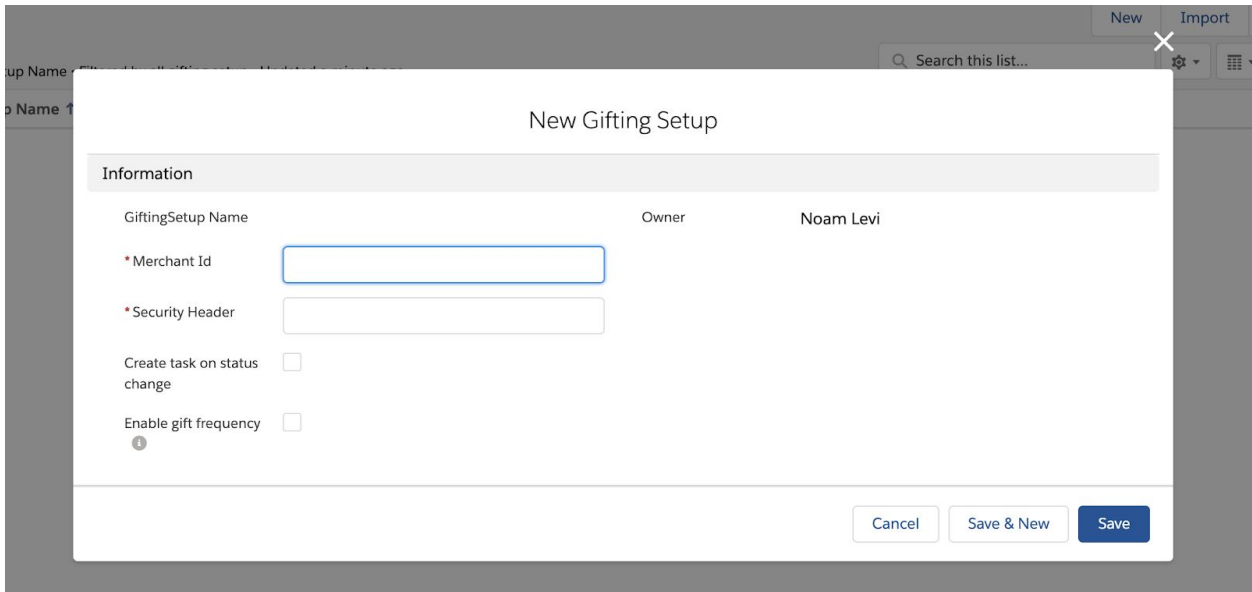
|                                            |                          |                  |                                           | New Remote Site |                   |                    |                   |                    |
|--------------------------------------------|--------------------------|------------------|-------------------------------------------|-----------------|-------------------|--------------------|-------------------|--------------------|
| Action                                     | Remote Site Name         | Namespace Prefix | Remote Site URL                           | Active          | Created By        | Created Date       | Last Modified By  | Last Modified Date |
| <a href="#">Edit</a>   <a href="#">Del</a> | <a href="#">GiftSend</a> | -                | <a href="#">https://corporategift.com</a> | ✓               | chaudhary.shivani | 1/28/2020, 3:41 AM | chaudhary.shivani | 1/28/2020, 5:43 AM |

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](#)

4. Click on app launcher and search for 'Gift merchant' and click on 'Gift merchants'



5. Create a new record in Gift merchant object and fill the record details;
  - *Merchant Id*= (Your Corporate Gift Account Manager will provide you with your merchant ID)
  - *Security Header*= (Your Corporate Gift Account Manager will provide you with your merchant ID)
  - *'Create task on Status Change'* (checkbox) - In case you want a task automatically created for every gift status change. For example - once a gift is created, status changed to 'Shipped' a task will get created.
  - *'Enable Gift Frequency'* (Checkbox) - Adds a 30 days
  - Click 'Save'

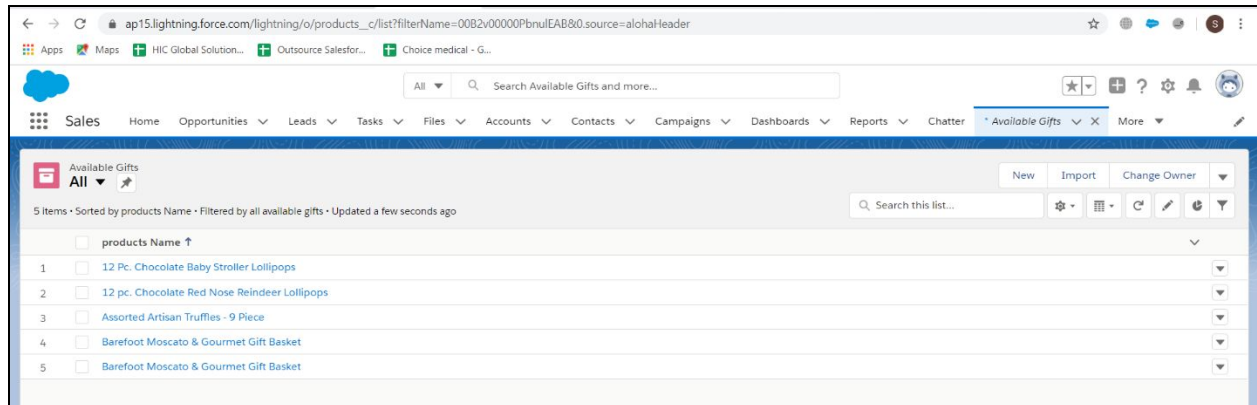


The screenshot shows the 'New Gifting Setup' form in Salesforce. The form is titled 'New Gifting Setup' and has a tab labeled 'Information'. The form contains the following fields and options:

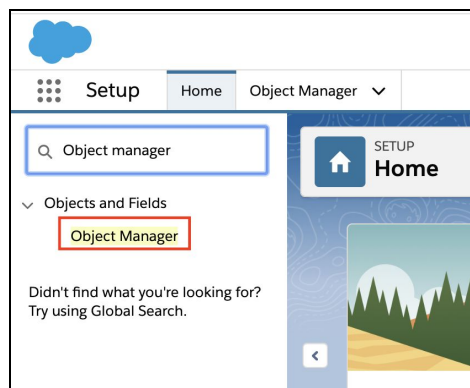
- GiftingSetup Name**: A text field.
- Owner**: A dropdown menu showing 'Noam Levi'.
- \* Merchant Id**: A required text field.
- \* Security Header**: A required text field.
- Create task on status change**: A checkbox.
- Enable gift frequency**: A checkbox with an information icon (i) next to it.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

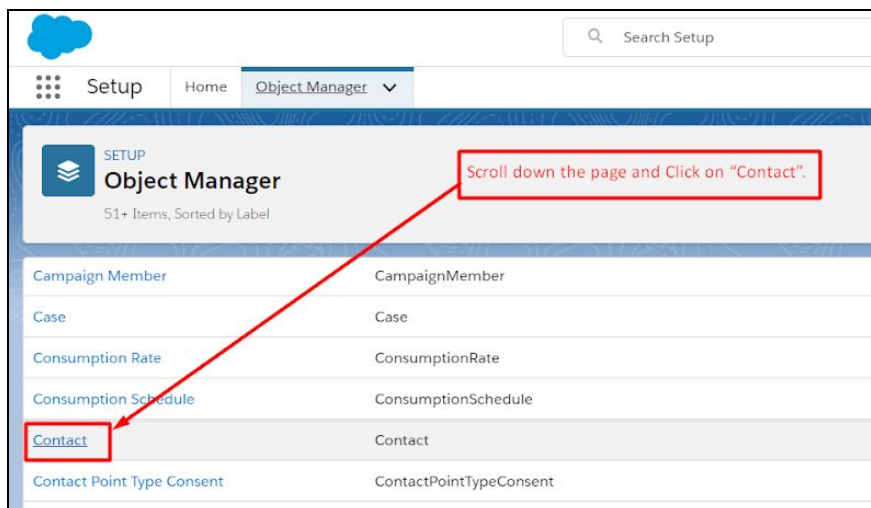
**PLEASE NOTE** - a new object was added - 'Available Gifts'. Here is where users can see the available gifts on your Corporate Gift Occasion page.



6. Search 'Object Manager' on the setup Quick find box and click on 'Object Manager' result below

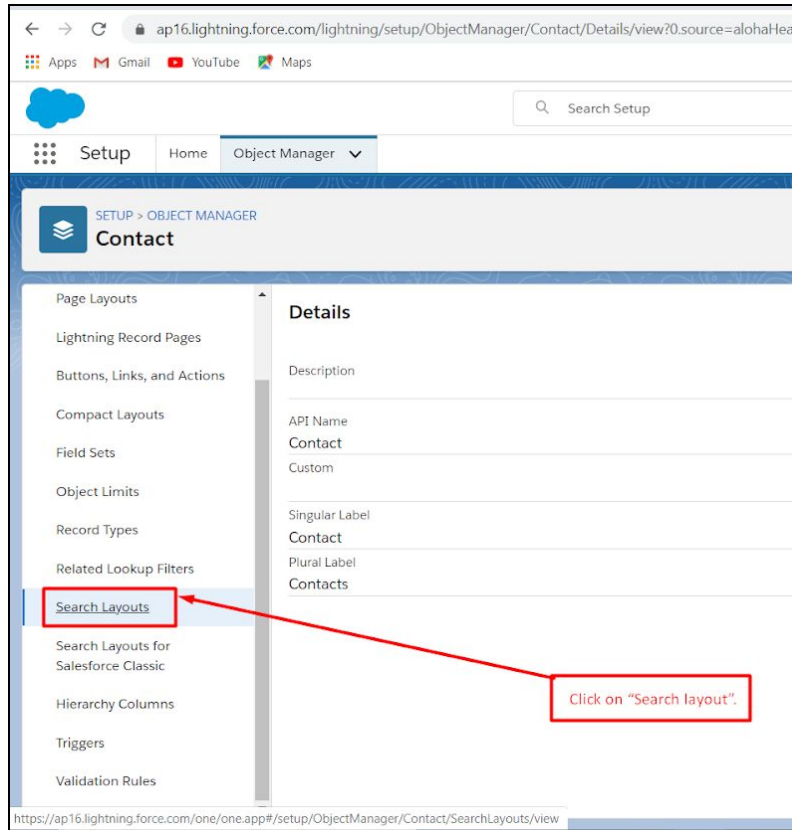


7. Scroll down the page and click on 'Contact' -

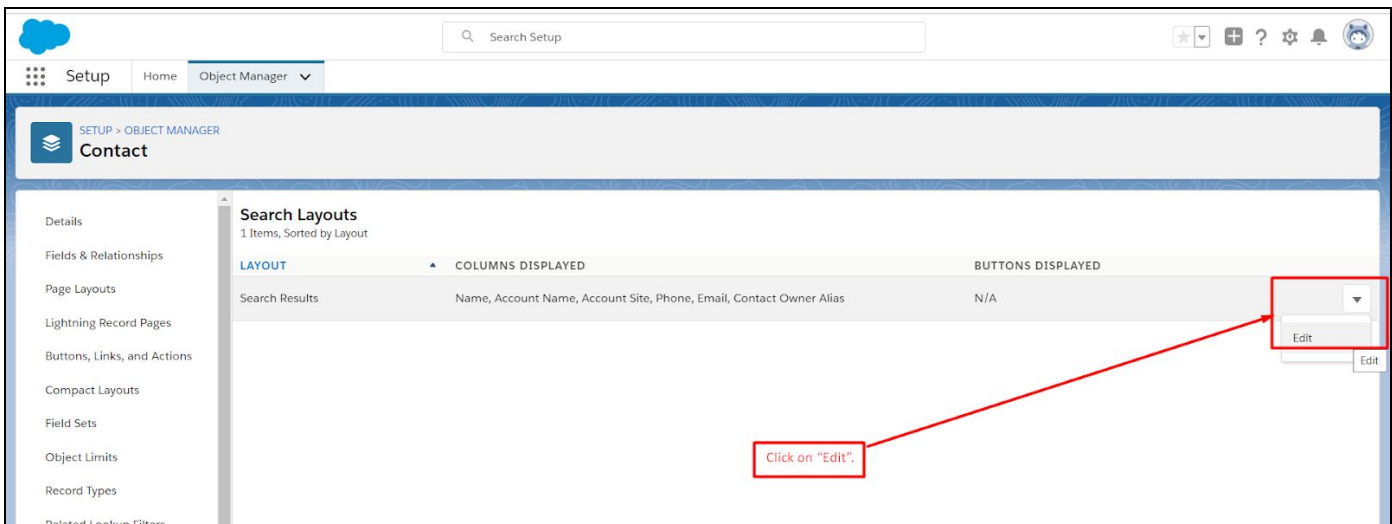


**NOTE** - You will need to repeat these steps for 'Leads' and 'Accounts' object

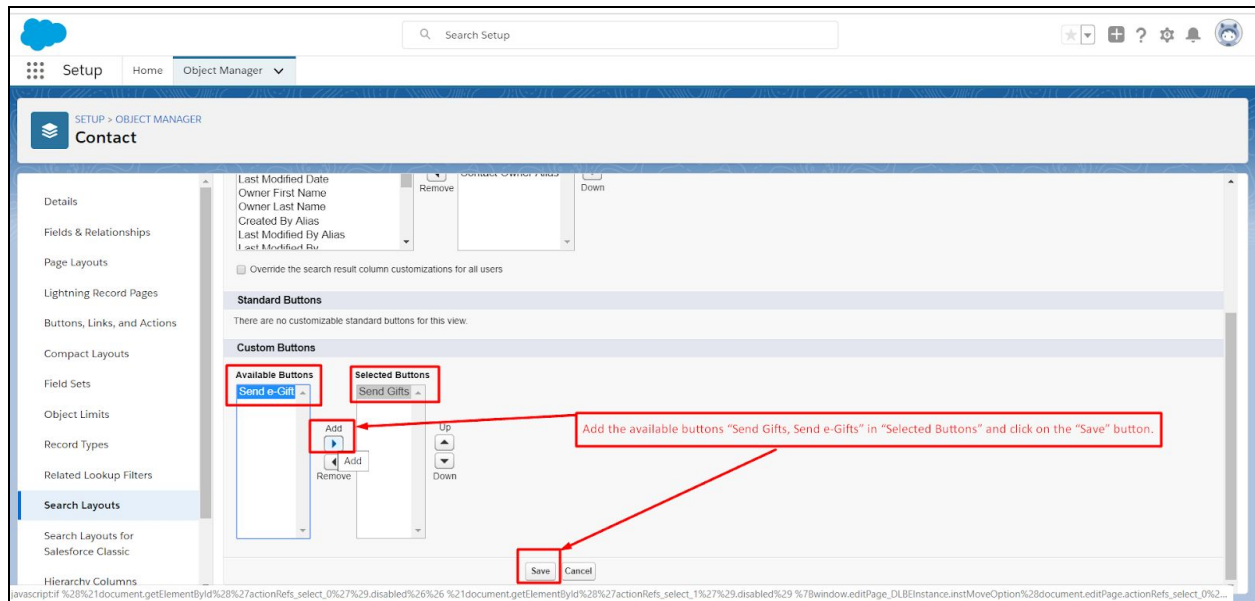
- Click on 'Search layout'



- Click 'Edit'

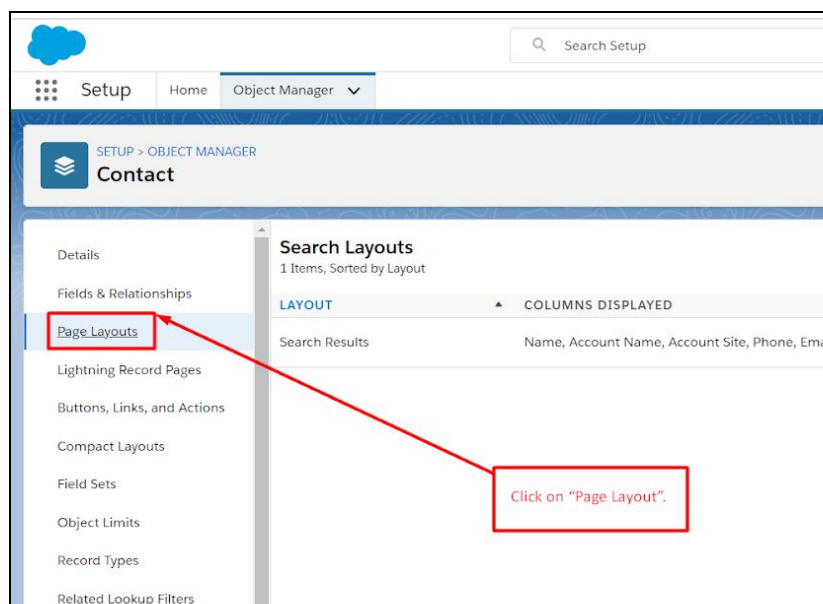


- Assign the available buttons '*Send Gifts*' and '*Send eGifts*' to the Selected Buttons and Save.



**NOTE** - 'Send eGifts' is available for 'Leads' & 'Contacts' Objects only

- Click on '*Page Layout*'



- Choose the layout you wish to edit

ap16.lightning.force.com/lightning/setup/ObjectManager/Contact/PageLayouts/view?source=aloahHeader

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Contact

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
Search Layouts for Salesforce Classic  
Hierarchy Columns

Page Layouts  
4 Items, Sorted by Page Layout Name

| PAGE LAYOUT NAME           | CREATED BY                         | MODIFIED BY                        |
|----------------------------|------------------------------------|------------------------------------|
| Contact (Marketing) Layout | Abhishek Gupta, 1/10/2020, 4:07 AM | Abhishek Gupta, 1/10/2020, 8:46 AM |
| Contact (Sales) Layout     | Abhishek Gupta, 1/10/2020, 4:07 AM | Abhishek Gupta, 1/10/2020, 4:07 AM |
| Contact (Support) Layout   | Abhishek Gupta, 1/10/2020, 4:07 AM | Abhishek Gupta, 1/10/2020, 4:07 AM |
| Contact Layout             | Abhishek Gupta, 1/10/2020, 4:07 AM | Abhishek Gupta, 1/10/2020, 4:07 AM |

Quick Find New Page Layout Assignment

click on "Edit" in "Contact (Marketing) Layout".

https://ap16.lightning.force.com/lightning/setup/ObjectManager/Contact/PageLayouts/view?source=aloahHeader#/setup/ObjectManager/Contact/PageLayouts/00h2w000002GLN2AAO/view

- Choose 'Mobile & Lightning Actions'
- Search for 'Send Gift' and 'Send eGift' and drag each one to the custom buttons section
- Click 'Save'

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Contact

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
Search Layouts for Salesforce Classic  
Hierarchy Columns

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields  
Buttons  
Custom Links  
Quick Actions  
Mobile & Lightning Actions  
Expanded Lookups

Quick Find send

Send eGift Send Pardot Email  
Send Engage Email Send Text  
Send Gift Send to Pardot  
Send Gift

Send Gift Send eGift Edit Log a Call New Task New Event New Note Post File Clone Submit for Approval  
Change Owner View Contact Hierarchy Change Record Type Delete Send Pardot Email Send to Pardot Call Do not use

Contact Detail

Standard Buttons  
Change Record Type Edit Delete View Contact Hierarchy Clone Change Owner Sharing View Self-Service Enable Self-Service Submit for Approval Get Survey Invitation Check for New Data

Custom Buttons  
Send Gift Send eGift

Contact Information (Header visible on edit only)

|                      |              |             |                          |
|----------------------|--------------|-------------|--------------------------|
| Name                 | Sarah Sample | Phone       | 1-415-555-1212           |
| In Process           | ✓            | Mobile      | 1-415-555-1212           |
| Title                | Sample Text  | Email       | sarah.sample@company.com |
| Department           | Sample Text  | Do Not Call | ✓                        |
| Active               | Sample Text  | Reports To  | Sample Text              |
| Lead Conversion Type | Sample Text  | Description | Sample Text              |

click on "Send Gift" and "Send eGift" and drag each one to the custom buttons section