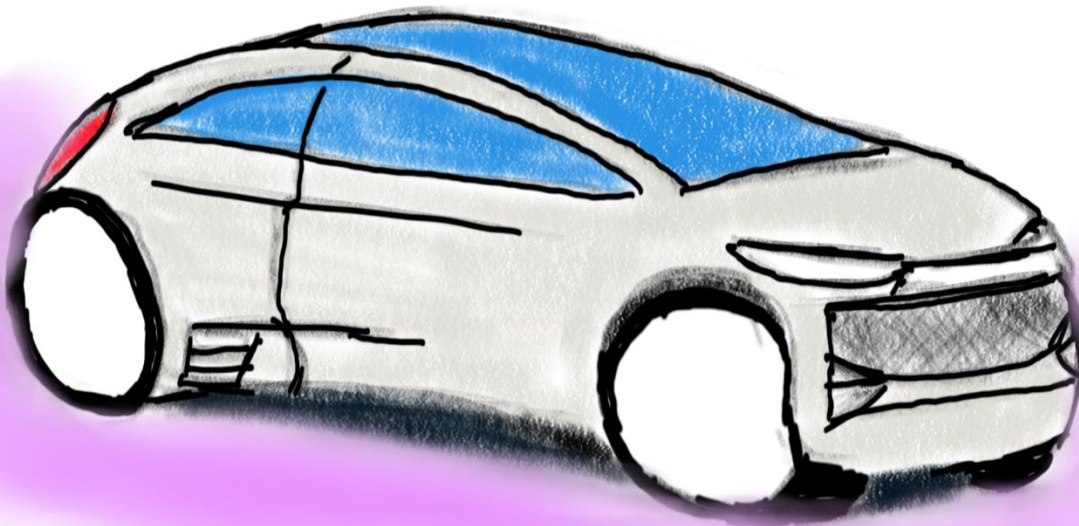


Automobile Self Service Portal



Pre & Post Installation Document

R Systems International Ltd

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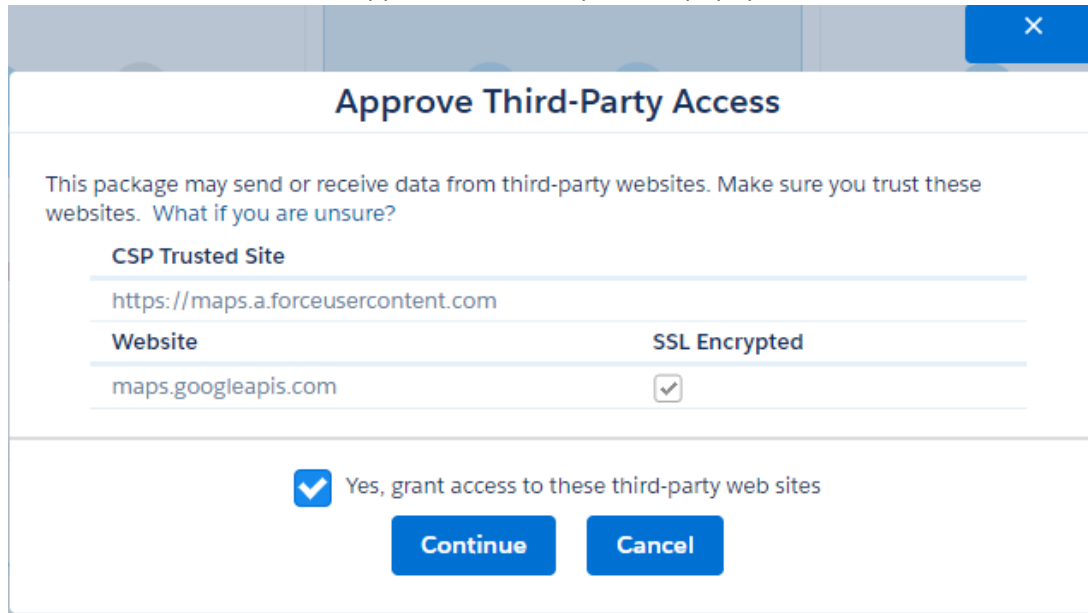
1 Change Summary

Sr #	Date	Version	Change Summary	Author
1	9/05/2019	V1.0	Initial Version	RSI Ltd.

2 Pre Install Steps:

2.1 Approve Third Party access:

- There are three URLs on the Approve Third-Party Access popup:

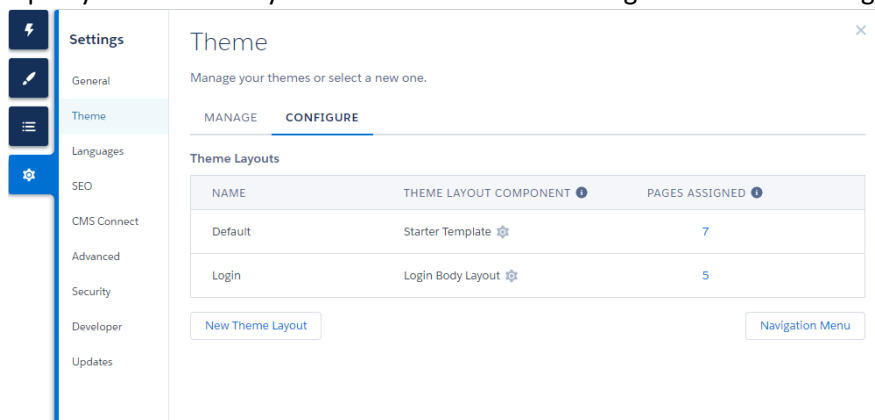


- **CSP Trusted Site:** https://maps.a.forceusercontent.com
 - This URL is required to allow rendering of Lightning Map component in a Guest User Community portal
 - Without this, the Salesforce Locker Service prevents the Lightning Map component from displaying and shows a 'Request Blocked' page instead.
- **Website:** maps.googleapis.com
 - This URL is utilized to resolve the Site Guest user entered address into Latitude and Longitude
 - The Request will fail if this is not allowed
- **Website:** www.google.com
 - This URL is utilized for the reCAPTCHA service
 - You can disable this later if you do not want to use reCAPTCHA for the public community (Not Recommended)

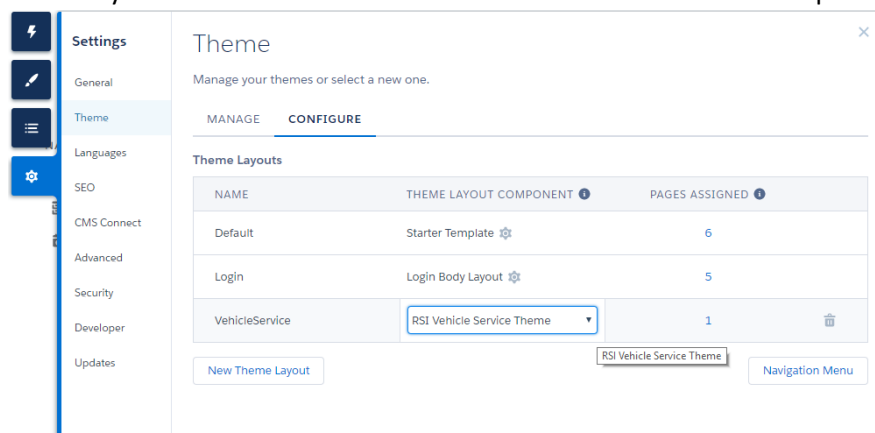
3 Post Install Steps:

3.1 Create a Public Community:

- Create a community that is open for public access
- Open your Community in Builder and click on Settings > Themes > Configure



- Click on the 'New Theme Layout' button above
- Enter any Name and select the RSI Vehicle Service Theme in the drop down as shown below. This name will be used later.



- Click on Save button
- We will now setup the Home Page against this theme
- Now click on Page Properties button against the Home page

The screenshot displays the 'Pages' management interface. On the left, a sidebar lists various page templates categorized into 'Template Pages', 'Generic Record Pages', and 'Login Pages'. The 'Home' page is currently selected. The main content area shows the 'Properties' tab for the 'Home' page. This tab includes several configuration sections: 'URL' (showing a slash), 'Page Access' (set to 'Community Default Setting: Public'), 'SEO' (with fields for 'Title' set to 'Home' and 'Description' with a placeholder text), 'Meta Tags' (with an 'Edit Meta Tags' button), and 'Layout'. The 'Layout' section shows '1 full-width column' selected from a dropdown, with a 'Change' button. At the bottom of the layout section, there is an unchecked checkbox labeled 'Override the default theme layout for this page.'.

- Select the 'Override the default theme layout for this page' check box
- In the Theme Layout drop down select the Name provided earlier

☒ Override the default theme layout for this page. 

Theme Layout 

VehicleService 

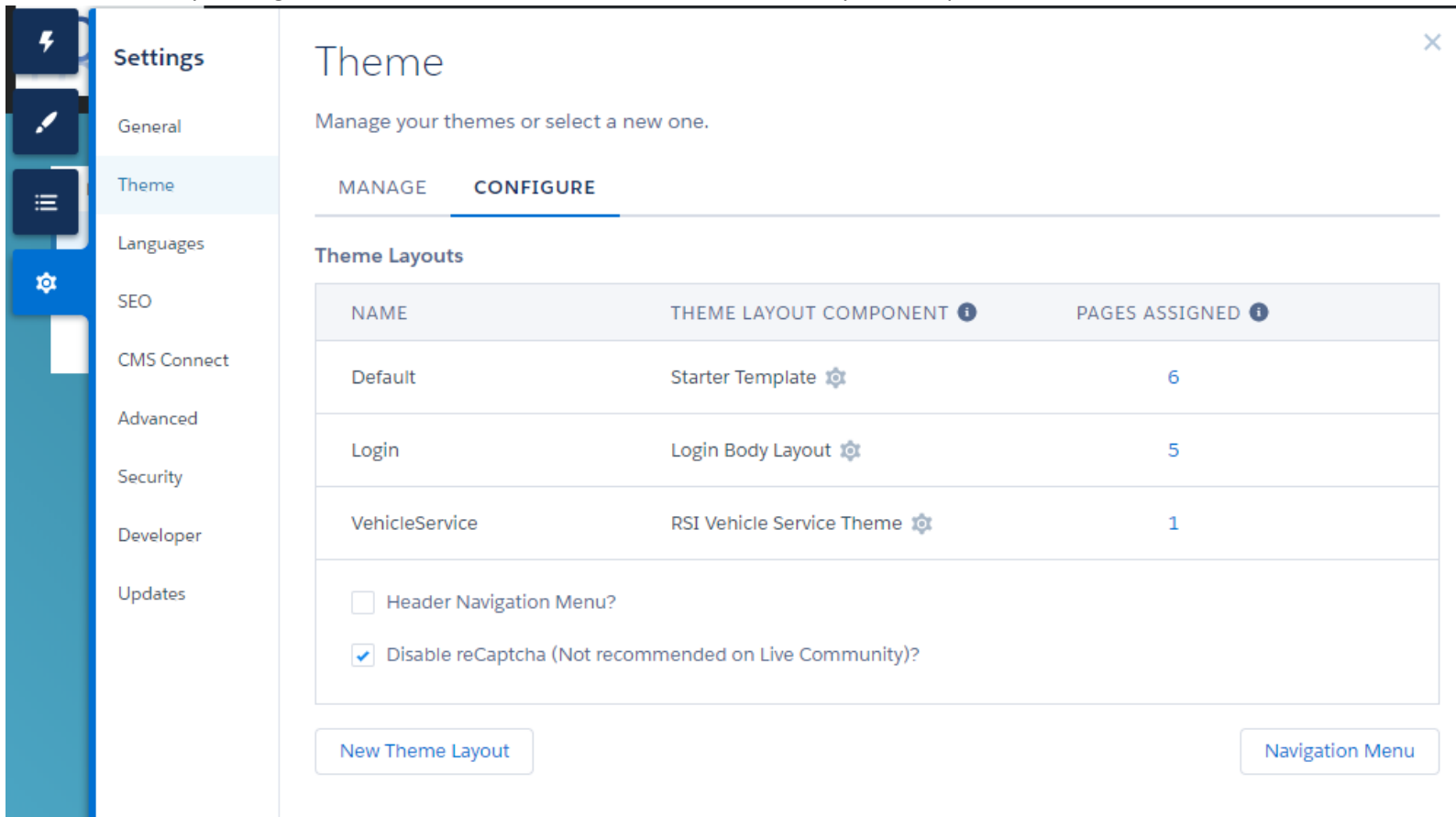
- From the Page Components list, drag and drop the 'RSI Vehicle Service Container' on to the Home Page
- Prior to performing the above step, you may have to temporarily Disable reCAPTCHA as per Section 3.2.2 in this document
- This will give you the recommended and best experience designed for the community

3.2 Community Theme Customizations:

- The following can be customized in the community:
 - Navigation Menu Style
 - Disable reCAPTCHA

3.2.1 Navigation Menu Style

- In the Community Settings > Theme, click on the Gear Icon next to Theme Layout Component 'RSI Vehicle Service Theme'



The screenshot shows the 'Theme' configuration page in the RSI Community Settings. The left sidebar contains a 'Settings' menu with options: General, Theme (selected), Languages, SEO, CMS Connect, Advanced, Security, Developer, and Updates. The main content area is titled 'Theme' and includes a subtitle 'Manage your themes or select a new one.' Below this are two tabs: 'MANAGE' and 'CONFIGURE' (active). The 'CONFIGURE' tab displays a table of 'Theme Layouts' with columns: NAME, THEME LAYOUT COMPONENT, and PAGES ASSIGNED. The table lists three layouts: 'Default' (Starter Template, 6 pages), 'Login' (Login Body Layout, 5 pages), and 'VehicleService' (RSI Vehicle Service Theme, 1 page). Below the table are two checkboxes: 'Header Navigation Menu?' (unchecked) and 'Disable reCaptcha (Not recommended on Live Community)?' (checked). At the bottom, there are two buttons: 'New Theme Layout' and 'Navigation Menu'.

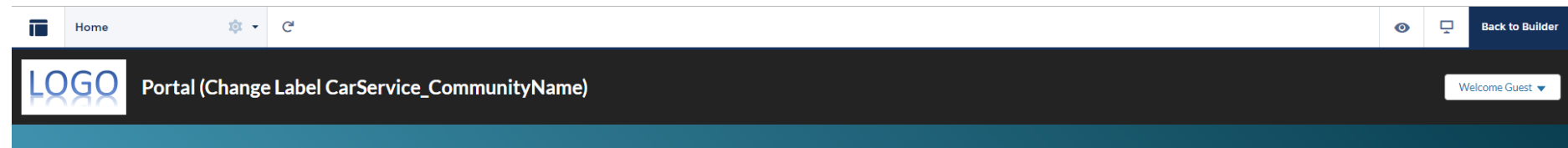
NAME	THEME LAYOUT COMPONENT	PAGES ASSIGNED
Default	Starter Template	6
Login	Login Body Layout	5
VehicleService	RSI Vehicle Service Theme	1

☐ Header Navigation Menu?
☒ Disable reCaptcha (Not recommended on Live Community)?

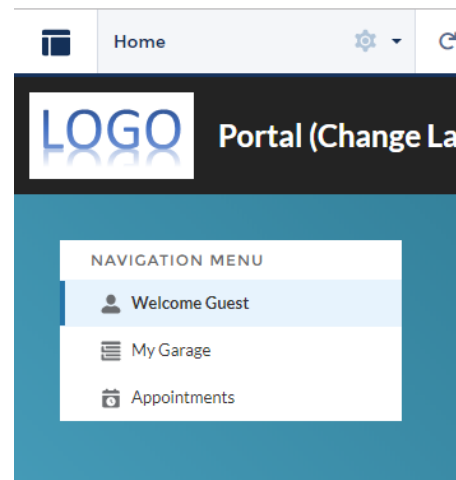
New Theme Layout Navigation Menu

- Above, you can check / uncheck the Header Navigation Menu? Field
- This shows up as follows:

- Checked:

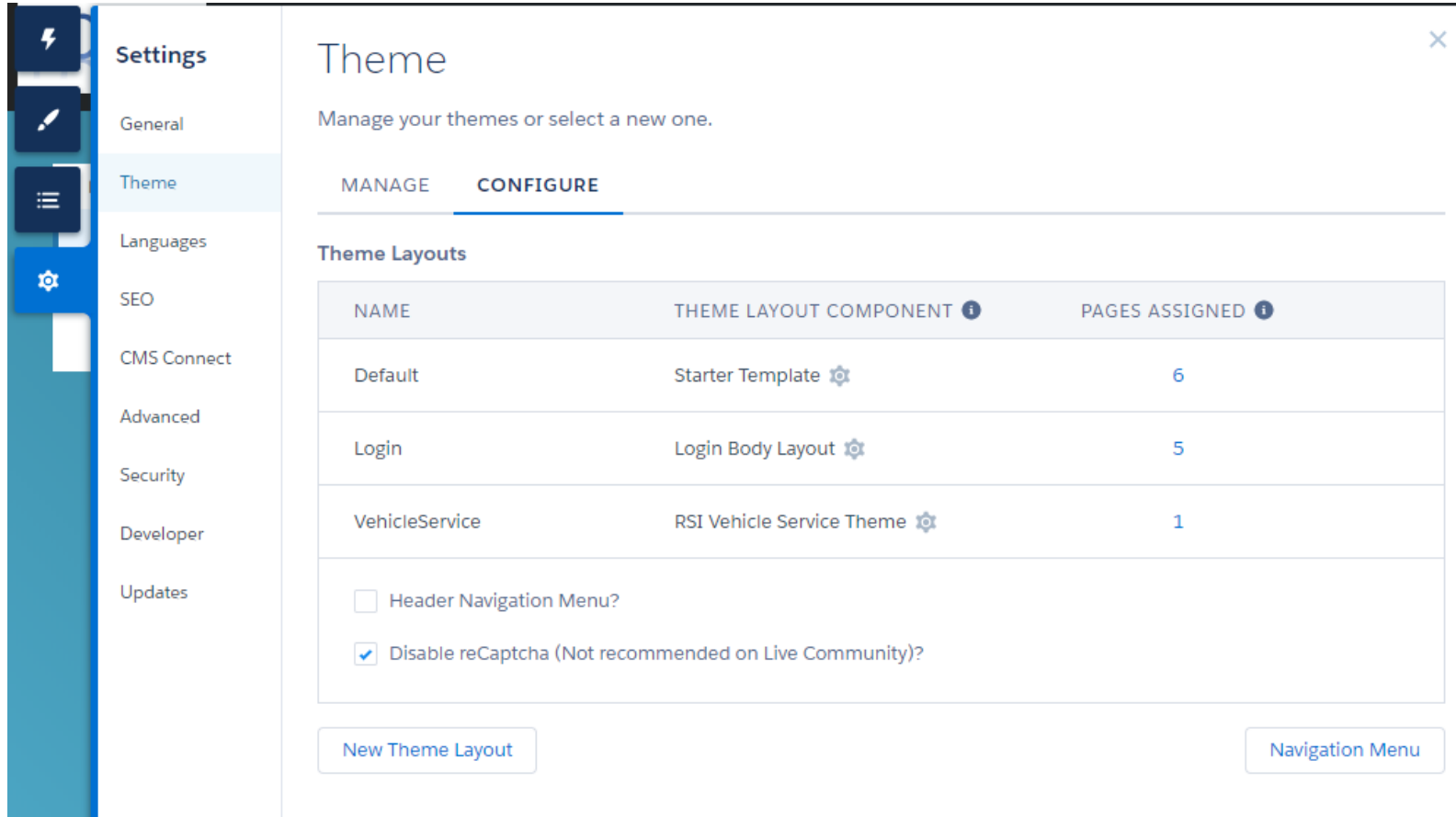


- Unchecked:



3.2.2 Disable reCAPTCHA

- In the Community Settings > Theme, click on the Gear Icon next to Theme Layout Component 'RSI Vehicle Service Theme'



Settings

- General
- Theme**
- Languages
- SEO
- CMS Connect
- Advanced
- Security
- Developer
- Updates

Theme

Manage your themes or select a new one.

MANAGE **CONFIGURE**

Theme Layouts

NAME	THEME LAYOUT COMPONENT ⓘ	PAGES ASSIGNED ⓘ
Default	Starter Template ⚙️	6
Login	Login Body Layout ⚙️	5
VehicleService	RSI Vehicle Service Theme ⚙️	1

☐ Header Navigation Menu?

☒ Disable reCaptcha (Not recommended on Live Community)?

[New Theme Layout](#)
[Navigation Menu](#)

- Above, you can check / uncheck the Disable reCAPTCHA? Field
- Note that this is not recommended when going live with the Community.
- This option's intended use is to allow customization of the community while in the builder.

3.3 Profile Settings

- Open your Community in Builder and click on Settings

The screenshot displays the 'Settings' interface for a community. On the left is a vertical sidebar with icons and labels for various settings categories: Settings (lightning bolt), General (pencil), Theme (three horizontal lines), Languages, SEO (gear), CMS Connect, Advanced, Security, Developer, and Updates. The 'Settings' header is at the top of the sidebar. The main content area is titled 'General' and includes a sub-header 'Community Details'. Below this, there are sections for 'Community Template' (Build Your Own), 'Public Access' (with a checked checkbox for 'Public can access the community'), 'Community Title' (with a text input field containing 'VehicleService'), 'Published Status' (labeled 'Published:'), and 'Guest User Profile' (with a description and a 'Learn More' link). A close button (X) is located in the top right corner of the settings panel.

Settings

General

View and edit the main properties of your community.

Community Details

Community Template
Build Your Own

Public Access ⓘ
☒ Public can access the community

Community Title
VehicleService

Published Status
Published:

Guest User Profile
Configure access for guest or unauthenticated users. [Learn More](#)
[VehicleService Profile](#)

- Click on the Auto generated Guest User Profile name (VehicleService Profile in above example) and edit it as per the below settings

Profile
VehicleService Profile [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [View Users](#)

Name	VehicleService Profile		
User License	Guest	Custom Profile	✓
Description			
Created By	RSI LTRBotAuto	9/2/2019 4:16 PM	Modified By: RSI LTRBotAuto, 9/4/2019 7:13 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout (View Assignment)	Job Tracker	Job Tracker Layout - Winter '16 (View Assignment)
Email Application	Not Assigned (View Assignment)	Lead	Lead Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Account	Varies by Record Type (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Account Brand	Account Brand Layout (View Assignment)	Order	Order Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset File	Asset File Layout (View Assignment)	Price Book	Price Book Layout (View Assignment)

3.3.1 Administrative Permissions:

- Ensure that following Permissions are provided
 - API Enabled

3.3.2 General User Permissions:

- Ensure that following Permissions are provided:
 - Access Activities
 - Edit Tasks
 - Mass Email
 - Run Flows
 - Send Email
 - Send Non-Commercial Email

3.3.3 Field-Level Security Settings:

- Click on [View] hyperlink against Account object
- Click on Edit button
- This will allow you to edit the Account FLS
- Ensure that following fields have both Read and Edit access provided:

- # of Bays
- Account Name
- Account Record Type
- Billing Address
- Email
- Click on Save button
- Navigate back to the Profile view
- Click on [View] hyperlink against the Case object
- Ensure that all the fields have Read and Edit access
 - Note: Formula fields will only have Read access
- Ensure that Field Level Security allows access to Read and Edit all fields against following custom objects:
 - Customer
 - Vehicle

3.3.4 Record Type Settings:

- Ensure the default settings are per the below table

Object Name	Default Record Type
Account	Dealership
Case	Vehicle Service

3.3.5 Standard & Custom Object Permissions

- Provide permissions as per below table

Object Type	Name	Read	Create	Edit	Delete	View All	Modify All
Standard	Account	✓					
Standard	Case	✓	✓				
Custom	Customer	✓	✓	✓	✓	✓	✓
Custom	Vehicles	✓	✓	✓	✓	✓	✓
Custom	Resolution Steps	✓	✓	✓	✓	✓	✓

3.3.6 Enabled Apex Class Access

- Add the following Apex Classes here:
 - RSI_BoltAuto.CarService_CaseEstimatedDateCalculator
 - RSI_BoltAuto.CarService_SearchVehicle
 - RSI_BoltAuto.MockHttpResponseGMaps
 - RSI_BoltAuto.CarService_CaseObjectLogic
 - RSI_BoltAuto.CarService_DMLUtility
 - RSI_BoltAuto.CarService_LatLongLookup
 - RSI_BoltAuto.CarService_OwnerCommunityClass
 - RSI_BoltAuto.CarService_SearchContact
 - RSI_BoltAuto.CarService_ServiceCenterSearch
 - RSI_BoltAuto.SendCaseEmail
 - RSI_BoltAuto.SetupEmailFields

3.4 Site Guest User Setup

- Open the Guest user automatically created as part of the Community
- Edit this user and ensure that the following are as per requirements:
 - Email
 - Timezone

3.5 Setup Public Groups

- **Note: This step is required only if your Organization's OWD settings for Account is Private.**
- Create a Public Group as follows:

Group
CarService_External Guest Users

Label	CarService_External Guest Users	Edit	Delete
Group Name	CarService_External_Guest_Users		
Grant Access Using Hierarchies	☒		
Created By	RSI LT BoltAuto, 9/4/2019 7:00 PM		

[View All Users](#)

Name
VehicleService_Site_Guest_User

- Add the Guest User created as part of the Community under this group.

3.6 Setup Sharing Settings

- **Note: This step is required only if your Organization's OWD settings for Account is Private.**
- Navigate to Security Controls > Sharing Settings
- Under Account Sharing Rules, create a new Sharing Rule as follows:

Label: CarService_ShareDealerAcc
Rule Name: CarService_ShareDealerAcc
Description:

Step 1: Select your rule type

Criteria	Field	Operator	Value	
	Account Record Type	equals	Dealership	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Share with: Group: CarService_External Guest Users

Default Account and Contract Access: Read/Write

Contact Access: Read/Write

Opportunity Access: Private

Case Access: Read/Write

Created By: RSI LT BoltAuto, 9/4/2019 7:01 PM

3.7 Enable Data Integration Rules

- In order to calculate the distance between the Vehicle Owner and the Service Center, the application utilizes the Geocodes.
- The application relies on automatic Geocodes population on the Account object for the OOB Billing Address fields.
- Please ensure that these are enabled.
- To enable these follow the below steps:
 - Navigate to Setup > Data Management > Data Integration Rules
 - Select the OOB 'Geocodes for Account Billing Address' Data Integration Rule

Account Data Integration Rule
Geocodes for Account Billing Address
[« Back to List: Data Integration Rules](#)

Rule Details

Edit Rule Settings
Edit Field Mapping
Activate

Name	Geocodes for Account Billing Address
Description	Adds geocodes for Billing Address
Object	Account
Data Service	Data.com Geo
Update all records (recommended)	☒
Bypass triggers	☒
Bypass workflow rules	☒
Leave last-modified information unchanged	☒
Current Status	Inactive
Created By	Automated Process, 9/5/2019 8:50 AM
Modified By	Automated Process, 9/5/2019 8:50 AM

Edit Rule Settings
Edit Field Mapping
Activate

- Click on Edit Field Mapping and ensure the below setup is in place:

→ GEOCODES FOR ACCOUNT BILLING ADDRESS > FIELD MAPPING

Data Integration Rule Field Mapping

MATCH UPDATE

Select fields in Salesforce to match with fields on the data service. Make sure to pair each data service field with a field in Salesforce.

Data Service Fields	Account Fields
Address Line 1	Billing Street
City	Billing City
Country/Territory	Billing Country
PostalCode	Billing Zip/Postal Code
State	Billing State/Province

Cancel Save

→ GEOCODES FOR ACCOUNT BILLING ADDRESS > FIELD MAPPING

Data Integration Rule Field Mapping

MATCH UPDATE

Select fields in Salesforce to update with data from the data service. The rule fills blank fields. It keeps existing data except where you select Overwrite.

Data Service Fields	Account Fields
GeoAccuracy Num	Billing Geocode Accuracy
Latitude	Billing Latitude
Longitude	Billing Longitude

Cancel Save

- Click on Activate button
- Click on Ok on the popup page

Activate Data Integration Rule

You're about to activate the Geocodes for Account Billing Address data integration rule.

 Your data integration settings are configured to update all records. Based on your settings, data integration doesn't change the last-modified date and time of a record.

OK Cancel

- The Rule will be activated and Salesforce will resolve the Geolocation for all Billing Addresses in your Account object

3.8 Case Object Configuration

- We use a custom picklist value labeled 'Cancelled' for the OOB Status field on Case.
- This does not migrate as part of the package installation process and needs to be manually done.
- Please follow the below instructions to add the picklist value:
 - Navigate to Setup > Customize > Cases > Fields
 - Click on the Status field
 - This will bring up the Case Status Picklist values
 - Create a new Picklist value as follows and click on the Save button

Add Picklist Values Case Status

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

To add the new value to the picklist values for a particular Support Process, check the appropriate boxes below.

	Support Processes	Description
☒	Vehicle Service	This support process governs the servicing of the vehicles booked through the community

- Click Edit against the newly created Picklist value of Cancelled in the Case Status Picklist values list
- Ensure that the check box 'Closed' is selected and click on Save button

3.9 Enable Translation Workbench

- The application uses Custom Labels and to change their values you need to enable Translation Workbench in your org.
- Navigate to Setup > Translation Workbench > Translation Settings
- If not already enabled, click on the Enable button
- Under Supported Languages, Add English language to the list. Add the System Administrators as translators for English.
- For changing Custom Label values, open individual Custom Label and add values under the Translations section.

3.10 Google Maps API Settings

- Google Maps API is utilized to resolve the distance between the Vehicle Owner's entered address and the service centers.
- It is mandatory to have this in place.

3.10.1 Steps for obtaining Google Maps API

- Follow the steps provided at <https://developers.google.com/maps/documentation/javascript/get-api-key> to generate an API Key for the Geocoding API

3.10.2 Setup in Salesforce

- Navigate to Setup > User Interface > Custom Labels
- Change the value of Label with Name CarService_GMapsAPIKey to the API key obtained from Google Maps

3.11 Google reCAPTCHA settings

- We are using the Google reCAPTCHA v3 with this application. It is interaction free and does the user verification without any user interaction.
- The reCAPTCHA is integrated with the Community Theme and renders by default.
- This is mandatory to have if you want to use the Community with reCAPTCHA.
- To allow reCAPTCHA execution, follow the below steps:
 - Open <https://www.google.com/recaptcha> in your browser
 - Click on Admin Console button on the right corner of the page and Sign in
 - Register a new site by following the on screen steps. Ensure that you select reCAPTCHA type as reCAPTCHA v3.
 - Add the following under Domains section:
 - force.com
 - visualforce.com
 - Google will automatically generate two Keys viz., Site Key and Secret Key
 - These values need to be updated in Salesforce as follows:

Salesforce Custom Label Name	Update Custom Label Value to?
reCaptchaSiteKey	Google reCAPTCHA v3 Site Key value
reCaptchaSecretKey	Google reCAPTCHA v3 Secret Key value

- Change the URLs on the following Custom Labels:

Salesforce Custom Label Name	Update Custom Label Value to?
CarService_BaseURL	The Lightning URL for your community minus the Community Name
CarService_VFOrigin	CarService_BaseURL label value plus String in quotes '/.lightning.force.com'

3.11.1 Customizing the reCAPTCHA page

- The reCAPTCHA page utilizes the following Custom Labels to populate text in various locations.

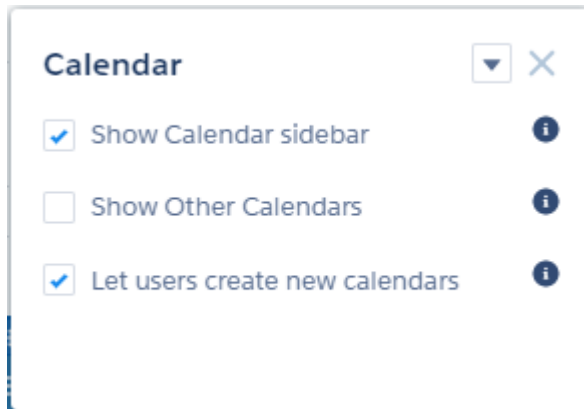
Label Name	Used For
CarService_CommunityName	Name of the Vehicle Owner External Community. This shows up on reCAPTCHA page and Theme
CarService_reCaptchaMsg	Message describing the purpose of the Community. This shows up on reCAPTCHA page
CarService_CaptchaList	Shows up on the truncated List of Services section. This shows up on reCAPTCHA page
CarService_CorporateAddr	Shows up on the Corporate Office Section storing Address info. This shows up on reCAPTCHA page
CarService_MobileNum	Shows up on the Corporate Office Section storing Phone info. This shows up on reCAPTCHA page
CarService_CorpEmail	Shows up on the Corporate Office Section storing Email info. This shows up on reCAPTCHA page

3.12 Create a Service Center Community

Note: This is an optional step. It is provided here to help keep the licensing costs down.

3.12.1 Community Setup

- Please follow the below instructions to setup a Service Center community:
- Navigate to Setup > Customize > Communities > All Communities
 - Click on New Community button
 - Select any template and continue
 - Drag and drop the Calendar component into the content section of the preferred page
 - Customize the calendar component and enable the following options:

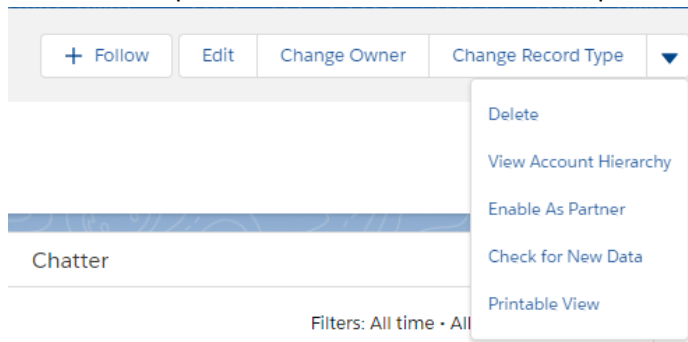


- Note that this is not a Public community
- Once community is setup to your liking Publish and Activate the community

3.12.2 Instructions to share Cases

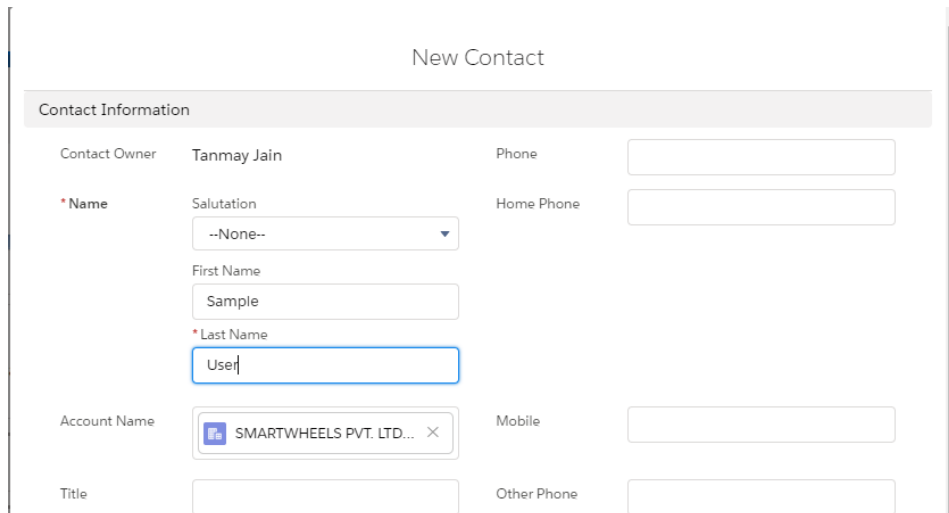
3.12.2.1 Community User creation

- Below instructions will help share cases belonging to a certain account with the community contact users under the Account
- Create an account of Record Type 'Dealership'
- In the menu options click on 'Enable as Partner' option



The screenshot shows a Salesforce record page for a 'Chatter' record. The top navigation bar includes buttons for '+ Follow', 'Edit', 'Change Owner', and 'Change Record Type'. The 'Change Record Type' dropdown menu is open, displaying options: 'Delete', 'View Account Hierarchy', 'Enable As Partner', 'Check for New Data', and 'Printable View'. The 'Enable As Partner' option is highlighted. Below the navigation bar, the record title 'Chatter' is visible, along with filters: 'Filters: All time · All'.

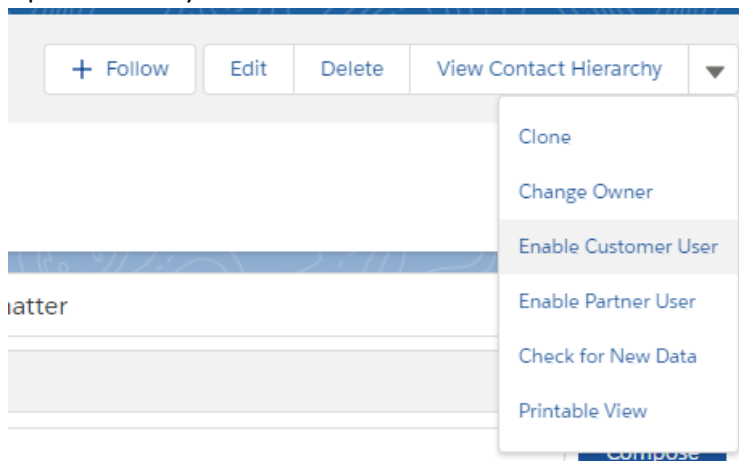
- Create a new Contact record under this account



The screenshot shows the 'New Contact' form in Salesforce. The form is titled 'New Contact' and has a section for 'Contact Information'. The form fields are as follows:

- Contact Owner:** Tanmay Jain
- Phone:** (Empty text box)
- *Name:**
 - Salutation:** --None-- (Dropdown menu)
 - First Name:** Sample (Text box)
 - *Last Name:** User (Text box)
- Home Phone:** (Empty text box)
- Account Name:** SMARTWHEELS PVT. LTD... (Text box with a close button)
- Mobile:** (Empty text box)
- Title:** (Empty text box)
- Other Phone:** (Empty text box)

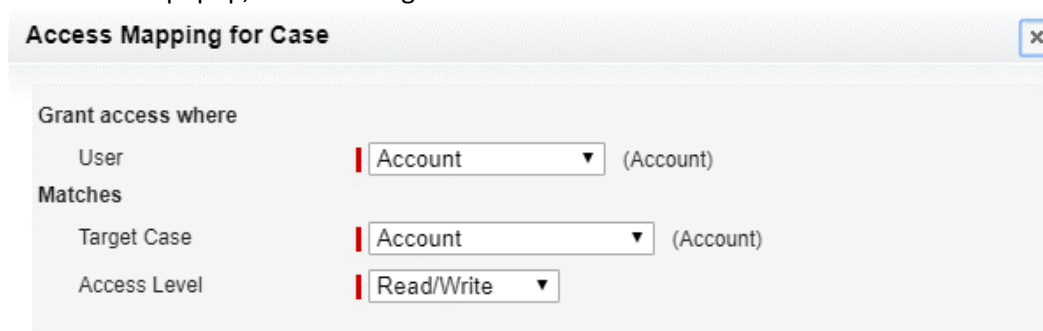
- Open the newly created contact record and select 'Enable Customer User' from the menu items



- Create a Salesforce user record as required and save. Ensure that the Profile selected for the Customer user is a part of the newly setup community

3.12.2.2 Sharing Set Creation

- Navigate to Setup > Customize > Communities > Communities Settings
- Scroll to the Sharing Sets section and create a New record
- Provide a Label, Sharing Set Name and Description as necessary
- Ensure that you move the Profile(s) that are part of the Community to the Selected Profiles section
- Under Select Object section, choose Case object and click on Set Up under the Configure Access section
- In the modal popup, select settings as below:



- The final setup will look like below:

Sharing Set

ShareGuestCases

[Help for this Page](#)

[« Back to Communities Settings](#)

Customize the settings for your Sharing Set.

Sharing Set Settings

Share Group Settings

Sharing Set

Edit

Delete

Label

ShareGuestCases

Sharing Set Name

ShareGuestCases

Description

Applies to Profiles

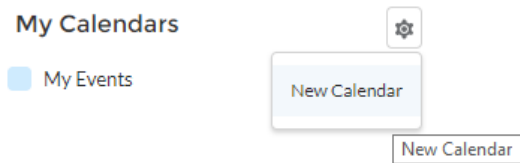
Name
Customer Community Plus Login User
Customer Portal Manager Standard
Customer Portal Manager
High Volume Customer Portal
Customer Community User
Customer Community Login User
Partner Community Login User
Partner Community User
Customer Portal Manager Custom
Customer Community Plus User

Access Granted

Action	Object	Access Determined By	Access Level
Edit Del	Case	User:Account = Case:Account	Read/Write

3.12.3 Calendar Setup

- Each community user needs to do the following to see their Account's cases on the Calendar:
 - Click on the Calendar Options Gear icon next to My Calendars and New Calendar



- In Step 1, select the Case object

Create Calendar
Step 1 of 2

Create a calendar from a Salesforce standard or custom object.

* Object

Case

Next

- In Step 2, provide a meaningful name and select rest of the options as follows:

Create Calendar
Step 2 of 2

* Calendar Name

Open / WIP Appointments

Start and Duration of Calendar Items ⓘ

* Field for Start ⓘ Field for End ⓘ

Appointment Date & Time (Date/Time) Estimated End Time (Date/Time)

Apply a Filter ⓘ * Field Name to Display ⓘ

All Open Cases Case Number

Back Save

- Click on the Save button to start seeing the booked appointments in the calendar.