

Highspot Connector for Salesforce

Installation and Configuration

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OVERVIEW

This document provides instructions for installing and configuring the Highspot app in Salesforce. The application allows users to access Highspot within Salesforce, to connect their pitches to Salesforce records, and to see targeted Highspot content in their Salesforce layouts.

INSTALL HIGHSPOT CONNECTOR PACKAGE INTO SALESFORCE

Your Services Executive will set up the Highspot side of the configuration for you. After that is done, the next step is to install the Highspot Connector Package into Salesforce. We will be walking through the process in Salesforce Classic. The Highspot package is Lightning ready; if your organization uses Lightning, you can walk through the classic setup, switch over to Lightning, and the Highspot section will appear as expected.

The user must be a Salesforce System Administrator for your company to install the package.

- Go to the AppExchange and search for "Highspot". Click "Get it Now".

 APP

 Lightning Ready

 Group & Up

 No Limits

Highspot Sales Enablement Platform

Increase sales effectiveness

★★★★★ (84)

Free - [Details below](#)

[OVERVIEW](#)
[DETAILS](#)
[REVIEWS 84](#)
[PROVIDER](#)

[Save](#)
[Get It Now](#)

How would you like to continue?


Install in production
 Includes active, trial or developer orgs


Install in Sandbox
 Test in a copy of your production org

- Select to install in production or sandbox. Click on Confirm and Install.
- In a sandbox installation, you might choose to install for all users, to avoid having to configure permissions. For production, however, we recommend that you begin by granting access to Admins Only. Later you can give access to other user profiles to view the Visualforce Pages for displaying Highspot content in Salesforce.


☒ **Install for Admins Only**


☐ **Install for All Users**


☐ **Install for Specific Profiles...**

- Click on Next to start the installation. Salesforce usually takes several minutes to complete the installation – you will receive an email when the installation is complete.

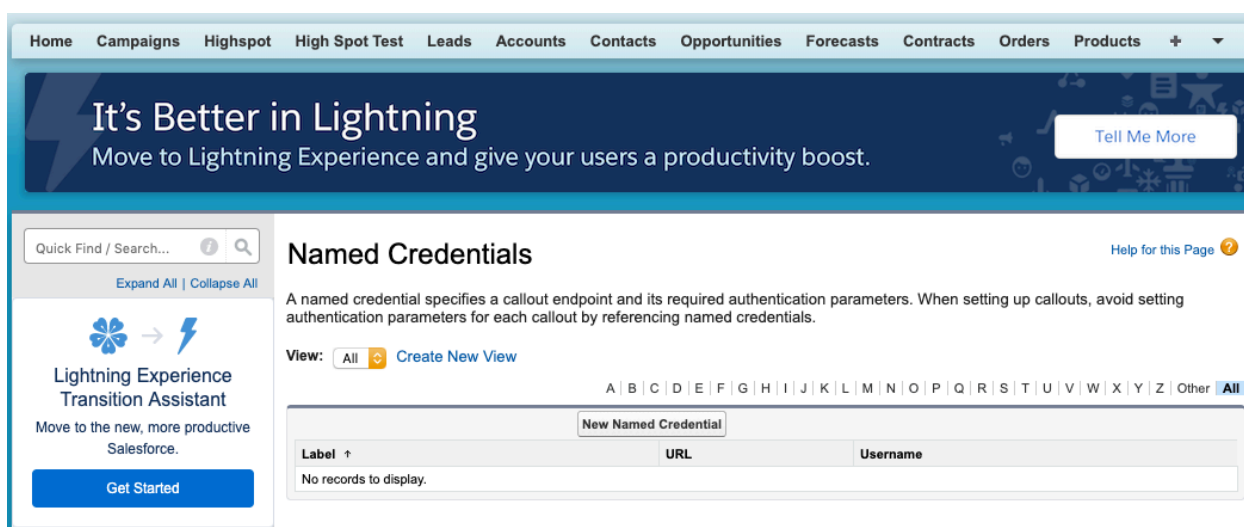
Highspot Connector components are now successfully installed into Salesforce. You are now ready to configure Remote Site Settings.

CONFIGURE NAMED CREDENTIAL

The next step is to configure Salesforce with a Named Credential to allow access to Highspot. This is done by creating a Named Credential in your Salesforce instance and requires the Salesforce user to be a System Administrator.

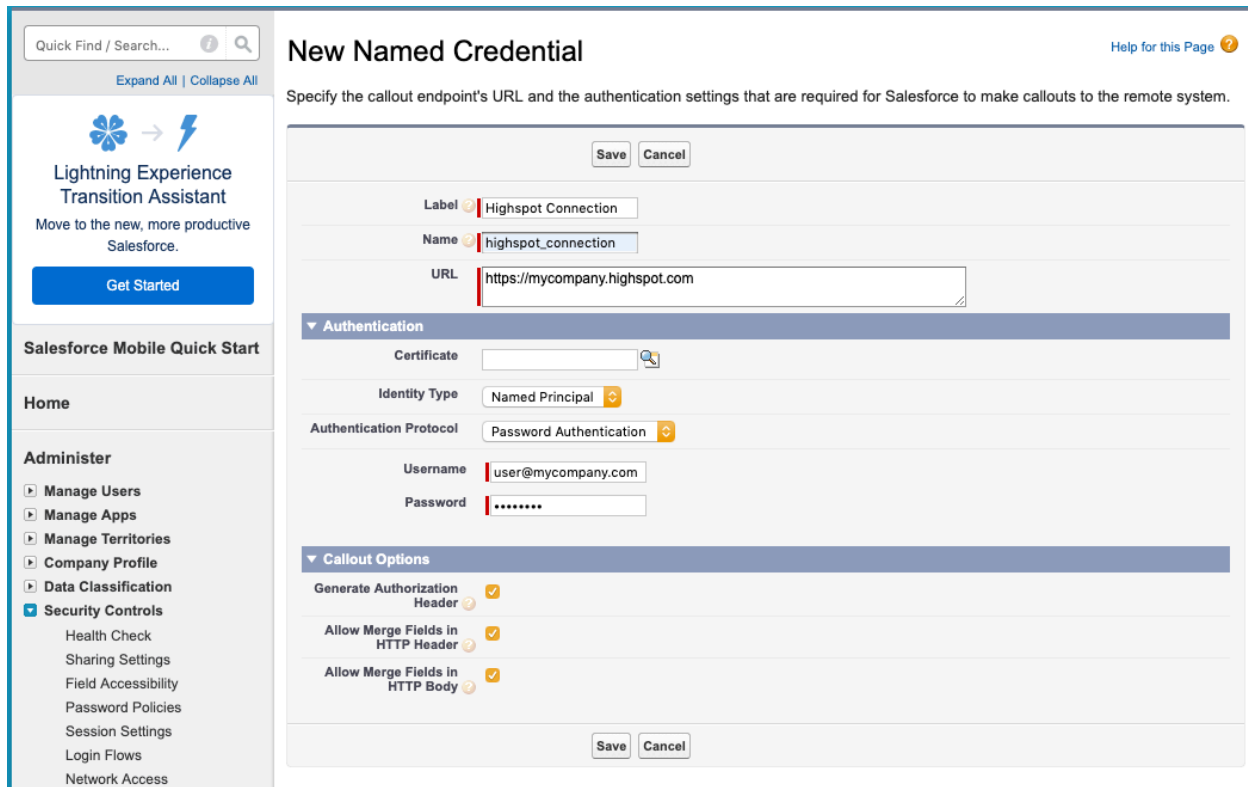
NOTE: In earlier versions of the package, the API User credentials were configured using the Highspot Configuration tab. If you are using package version 2.62 or earlier, you should follow the instructions in the [Appendix](#).

- Log in to Salesforce as a System Administrator
- Setup > Security Controls > Named Credentials



- Click on New Named Credential
 - Label: Highspot Connection
 - Name: highspot_connection
 - URL: <https://<subdomain>.highspot.com> (this should match the URL that you are using to access Highspot)
 - Identity Type: Named Principal
 - Authentication Protocol: Password Authentication
 - Username: Enter the email address of the Salesforce API User for Highspot (your Services Executive will provide this)
 - Password: Enter the password of the Salesforce API User for Highspot (your Services Executive will provide this)

- Callout Options: all three options should be checked (enabled)
- Save



New Named Credential

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label Highspot Connection

Name highspot_connection

URL https://mycompany.highspot.com

Authentication

Certificate

Identity Type Named Principal

Authentication Protocol Password Authentication

Username user@mycompany.com

Password

Callout Options

Generate Authorization Header ☒

Allow Merge Fields in HTTP Header ☒

Allow Merge Fields in HTTP Body ☒

Save Cancel

You have now configured the Named Credential to allow the API user to access Highspot from Salesforce. You are ready to verify the API Settings are configured correctly.

HIGHSPOT CONFIGURATION IN SALESFORCE

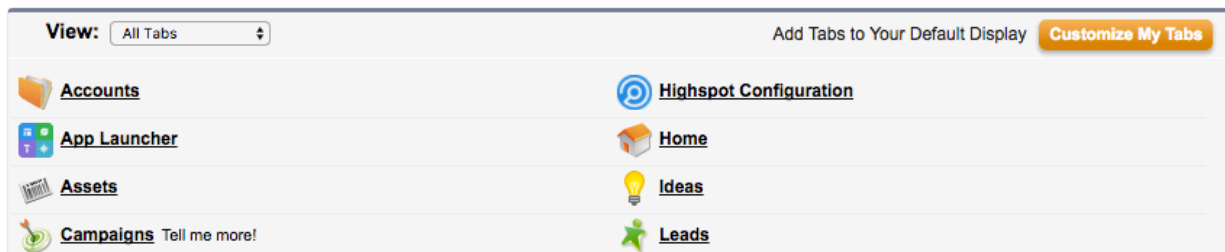
The next step is to verify the API Settings in Salesforce. The user must be a Salesforce System Administrator to view the Highspot Configuration tab.

- Log in to Salesforce as a System Administrator
- View all tabs by clicking on the + icon in the tabs ribbon
- Select the Highspot Configuration tab

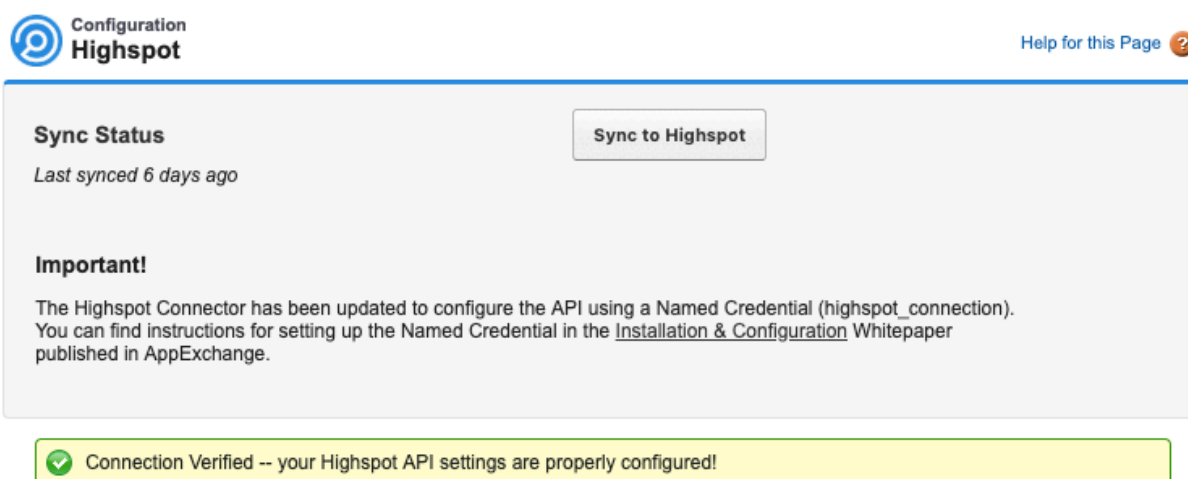
All Tabs

[Help for this Page](#) ?

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.



You will know the Named Credential and the API connection is set up when a green check marked Connection Verified message appears.



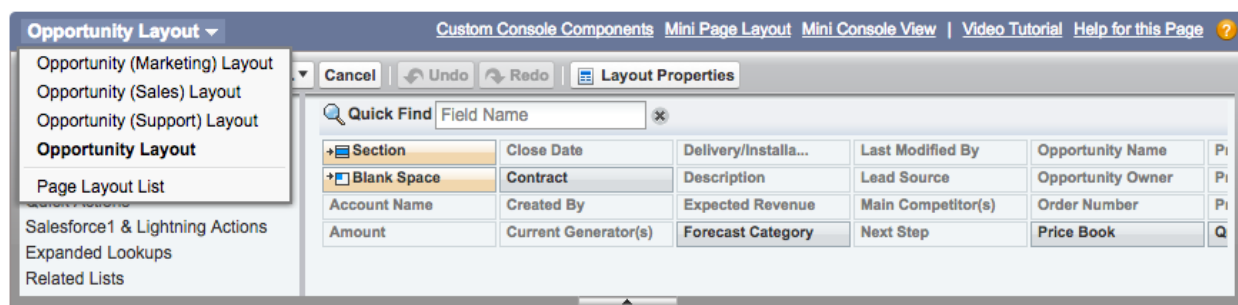
If you have any issues or get a message that is anything other than "Connection Verified", your Services Executive can help you diagnose and resolve the issue.

ADD HIGHSPOT CONTENT TO A PAGE LAYOUT

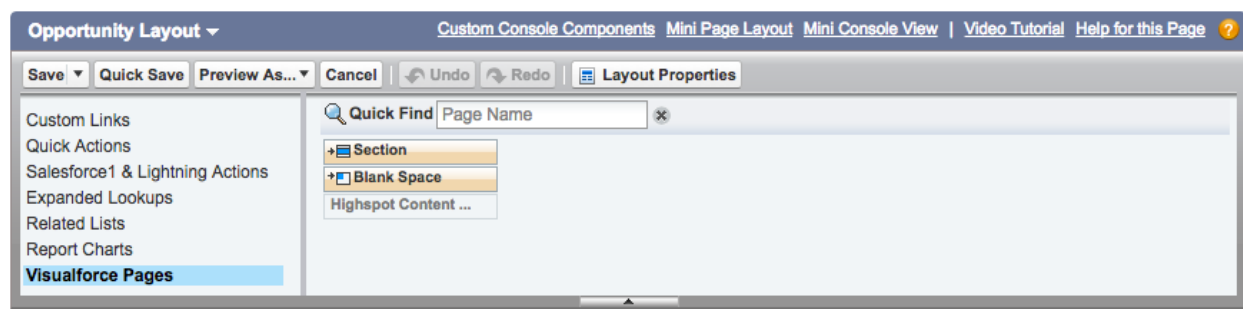
You are now ready to add the Highspot Content section to a page layout (Opportunity, Lead, Contact, etc). You must be a Salesforce System Administrator or given permission via a permission set to edit a page layout.

- Log in to Salesforce as a System Administrator
- Open the Opportunities tab
- Open a specific Opportunity record

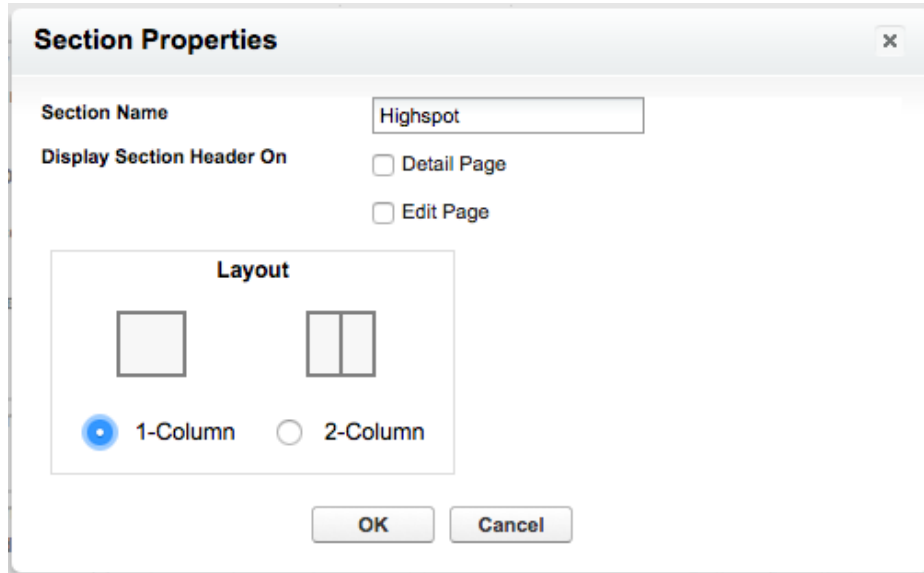
- Edit Layout
- Select the Layout you want to modify from the Opportunity Layout dropdown



- Select Visualforce Pages from the scrollable list on the left (below the save button)



- Drag a "Section" into the Layout, placing it where you want the Highspot content to be displayed (recommended just below the Custom Links section)
 - Section Name: "Highspot"
 - Uncheck Detail Page
 - Uncheck Edit Page
 - Layout: 1 Column
 - OK



Section Properties

Section Name:

Display Section Header On:

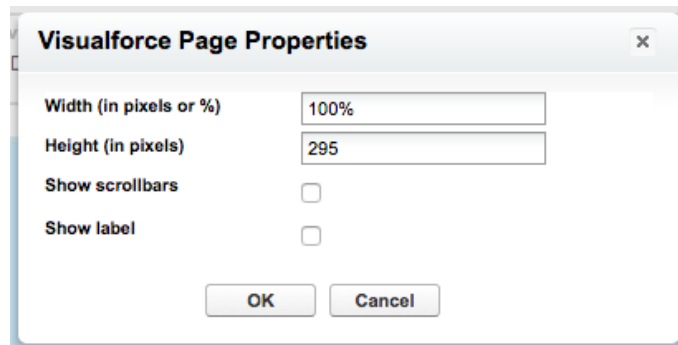
- ☐ Detail Page
- ☐ Edit Page

Layout

☒ 1-Column
 ☐ 2-Column

OK Cancel

- Drag the “Highspot Content” VisualForce page into the Highspot Section
- Click the properties icon (the wrench) in the upper right corner of the Visualforce page
 - Height (in pixels): 295
 - Click “OK”
- Save Layout



Visualforce Page Properties

Width (in pixels or %):

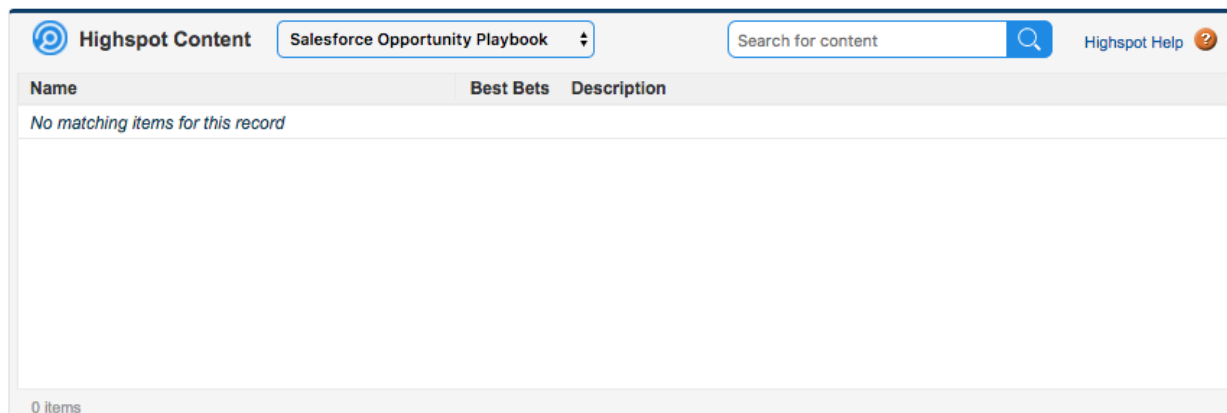
Height (in pixels):

Show scrollbars: ☐

Show label: ☐

OK Cancel

- Scroll down to where you placed the Highspot Content section and verify the Visualforce page is appearing correctly.



Once the layout has been saved, the Highspot Connector component should be displayed within the Opportunity Layout. If you have not yet configured Highspot on where to find published content, you should see “No matching items for this record” in the dropdown and a message which indicates there is a Highspot Configuration issue. Repeat the same process for adding Highspot content to other layouts in anticipation of the targeting exercise.

CONNECT HIGHSPOT TO SALESFORCE

Once you have synced Salesforce to Highspot via the API and placed the Highspot Content section into the appropriate layouts, you will connect Highspot back to Salesforce. This is done so Highspot can access Salesforce and keep maintain updated records.

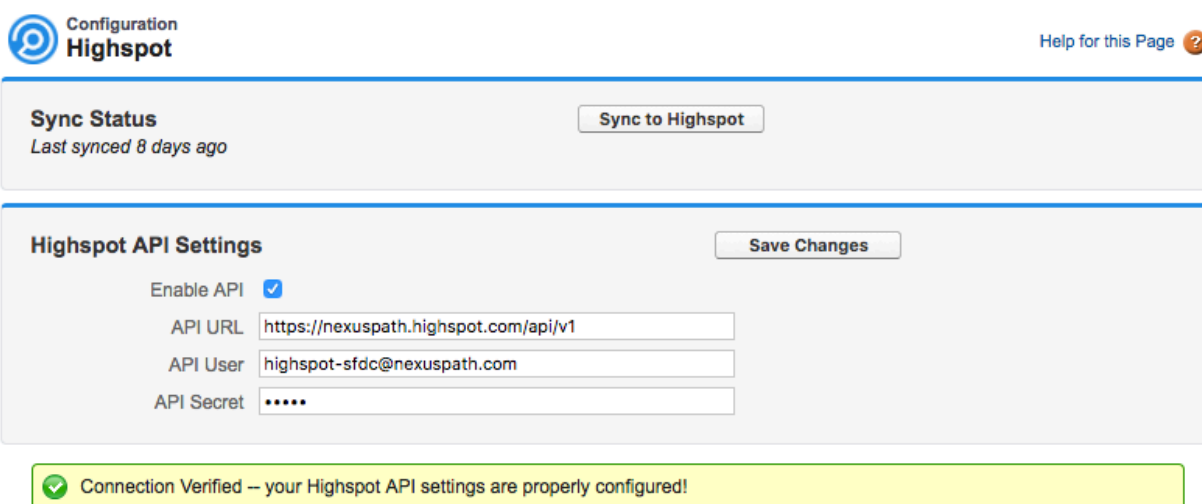
- Log in to Highspot as the Salesforce User account in the same browser
- Settings > Cloud Services
- Find the Salesforce row and click on Link Account
- Log in to Salesforce and link the Highspot Salesforce User account to a Salesforce account. You can connect with any Salesforce account and it is recommended **not** to connect to an administrator's account. You can read more about this in the FAQ section under “What accounts are used in the integration?”.

FUTURE SYNCS TO HIGHSPOT

When the Highspot Connector is first connected to Highspot, it will synchronize your Salesforce field definitions with Highspot so that you can create Salesforce Groups to filter your target content to a specific Opportunity, Lead, or Contact.

Subsequently, one may update the field definitions for your company in Salesforce, which you then want to use to filter content in Highspot. In order to get the modified field definitions into Highspot, a System Administrator must use the Highspot Configuration tab and click the "Sync to Highspot" button. This will send the current Salesforce field definitions to Highspot and update any existing Salesforce Groups to match your current field definitions. New fields and field values will be made available in Highspot.

Highspot will attempt to adjust the way that content is organized in the targeting spot to reflect the updated schema. If there is a change it cannot automatically handle (e.g. a value is deleted from the schema), a new list group will be created and the deleted list will be put into it. This allows you to make appropriate adjustments without losing the targeting information you have configured. Once you have made the changes, you can delete those old lists.



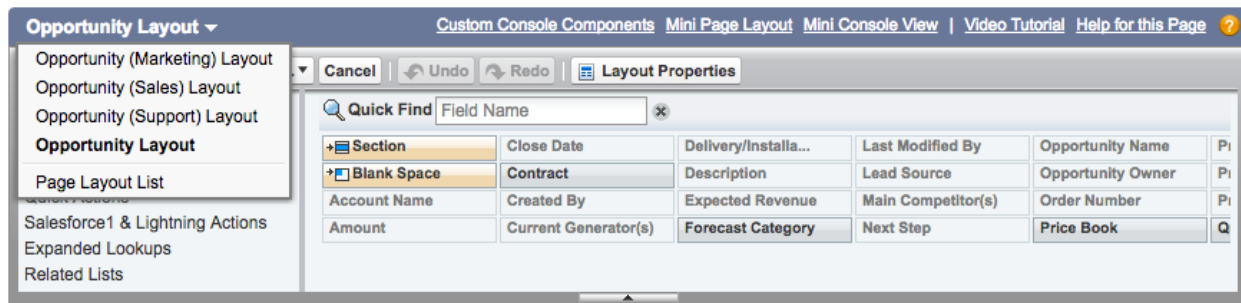
The screenshot shows the Highspot Configuration interface. At the top left is the Highspot logo and the word "Configuration". At the top right is a link "Help for this Page" with a question mark icon. Below this is a "Sync Status" section with the text "Last synced 8 days ago" and a "Sync to Highspot" button. Below that is the "Highspot API Settings" section with a "Save Changes" button. The API settings include a checked "Enable API" checkbox, and three input fields: "API URL" with the value "https://nexuspath.highspot.com/api/v1", "API User" with the value "highspot-sfdc@nexuspath.com", and "API Secret" with masked characters "*****". At the bottom is a green success message: "Connection Verified – your Highspot API settings are properly configured!"

SECURITY CONSIDERATIONS

Page Layout Assignment

In Salesforce, the System Administrator may assign profiles to use a specific Page Layout. This allows one to roll-out the Highspot Content feature to a restricted set of user profiles.

- In Edit Layout, use the Layout dropdown to select "Page Layout List"



- Click on the "Page Layout Assignment" button

Opportunity Page Layout

[Help for this Page](#)

This page allows you to create different page layouts to display Opportunity data.

After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Opportunity Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Opportunity (Marketing) Layout	Test User, 5/15/2017 12:32 PM	Test User, 5/15/2017 12:32 PM	☐
Edit Del	Opportunity (Sales) Layout	Test User, 5/15/2017 12:32 PM	Test User, 5/15/2017 12:32 PM	☐
Edit Del	Opportunity (Support) Layout	Test User, 5/15/2017 12:32 PM	Test User, 5/15/2017 12:32 PM	☐
Edit Del	Opportunity Layout	Test User, 5/15/2017 12:32 PM	Test User, 5/18/2017 2:23 PM	☐

- Click the "Edit Assignment" button

Page Layout Assignment

Opportunity

[Help for this Page](#)

The table below shows the page layout assignments for different profiles.

Profiles		Page Layout
Analytics Cloud Integration User		Opportunity Layout
Analytics Cloud Security User		Opportunity Layout
Authenticated Website		Opportunity Layout
Authenticated Website		Opportunity Layout
Chatter External User		Opportunity Layout
Chatter Free User		Opportunity Layout
Chatter Moderator User		Opportunity Layout
Contract Manager		Opportunity Layout
Cross Org Data Proxy User		Opportunity Layout
Custom: Marketing Profile		Opportunity (Marketing) Layout
Custom: Sales Profile		Opportunity (Sales) Layout
Custom: Support Profile		Opportunity (Support) Layout
Customer Community Login User		Opportunity Layout
Customer Community Plus Login User		Opportunity Layout
Customer Community Plus User		Opportunity Layout

- Select the profile to assign a new Page Layout to
- Select the Page Layout to use for the selected profile

- Save

Edit Page Layout Assignment

[Help for this Page](#) ?

Opportunity

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Page Layout To Use: -- Select Page Layout -- 0 Selected 0 Changed

Profiles	Page Layout
Analytics Cloud Integration User	Opportunity Layout
Analytics Cloud Security User	Opportunity Layout
Authenticated Website	Opportunity Layout
Authenticated Website	Opportunity Layout
Chatter External User	Opportunity Layout
Chatter Free User	Opportunity Layout
Chatter Moderator User	Opportunity Layout
Contract Manager	Opportunity Layout
Cross Org Data Proxy User	Opportunity Layout
Custom: Marketing Profile	Opportunity (Marketing) Layout
Custom: Sales Profile	Opportunity (Sales) Layout
Custom: Support Profile	Opportunity (Support) Layout
Customer Community Login User	Opportunity Layout

Visualforce Page Security

The Highspot Connector Package installation provides Visualforce Pages for adding Highspot content into a Salesforce page layout for an Opportunity, Lead, or Contact. When installing the package, it was suggested you grant access to “System Administrators” only.

A Salesforce System Administrator can allow other user profiles to view these Visualforce Pages by modifying the security settings for those pages.

- Setup > Build > Develop > Visualforce Pages
- Security
- Add or remove available profiles
- Save

Additional profiles should only be added for the Highspot Page and Highspot Content pages. The Highspot Configuration page should remain restricted to System Administrators only.

Visualforce Pages

[Help for this Page](#)

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.

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 W X Y Z Other All									
Developer Console									
Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Security  	Highspot Content for Contact	PlaybooksContact	highspot	30.0	Integrate targetted Highspot content for a Salesforce Contact	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM
Security  	Highspot Content for Lead	PlaybooksLead	highspot	30.0	Integrate targetted Highspot content for a Salesforce Lead	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM
Security  	Highspot Content for Opportunity	PlaybooksOpportunity	highspot	30.0	Integrate targetted Highspot content for a Salesforce Opportunity	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM
Security  	Highspot Configuration	PlaybooksConfiguration	highspot	30.0	Page for configuring API for accessing Highspot	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM
Security  	Highspot Page	HighspotPage	highspot	31.0	Page for displaying Highspot	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM
Security  	Highspot Content for Account	PlaybooksAccount	highspot	30.0	Integrate targetted Highspot content for a Salesforce Account	TestUser	5/18/2017 2:16 PM	TestUser	5/18/2017 2:17 PM

Enable Profile Access for Visualforce Page PlaybooksContact

Save

Cancel

Available Profiles

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

Contract Manager

Cross Org Data Proxy User

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile

Customer Community Login User

Customer Community Plus Login User

Customer Community Plus User

Customer Community User

Customer Portal Manager Custom

Customer Portal Manager Standard

Add

Remove

Enabled Profiles

System Administrator

Highspot Tab Security (Classic)

The Highspot Connector Package provides a Custom Tab for integrating Highspot seamlessly into Salesforce. When installing the package it was suggested you grant access to "System Administrators" only.

In order to allow other user Profiles to access the Highspot Tab, you will need to configure those Profiles.

- Setup > Administer > Manage Users > Profiles
- Select each Profile to enable the Highspot Tab for
- Click 'Edit'

Profiles

[Help for this Page](#)

All Profiles [Edit](#) | [Delete](#) | [Create New View](#)



New Profile			
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			
☐ Action	Profile Name ↑	User License	Custom
☐ Edit Clone	Marketing User	Salesforce	☐
☐ Edit Clone	Partner App Subscription User	Partner App Subscription	☐
☐ Edit Clone	Partner Community Login User	Partner Community Login	☐
☐ Edit Clone	Partner Community User	Partner Community	☐
☐ Edit Clone	Read Only	Salesforce	☐
☐ Edit Clone	Silver Partner User	Silver Partner	☐
☐ Edit Clone	Solution Manager	Salesforce	☐
☐ Edit Clone	Standard Platform User	Salesforce Platform	☐
☒ Edit Clone	Standard User	Salesforce	☐
☐ Edit Clone	System Administrator	Salesforce	☐
☐ Edit Clone	Work.com Only User	Work.com Only	☐

26-36 of 36

1 Selected

◀ Previous Next ▶

Page 2 of 2

- Tab Settings > Custom Tab Settings > Highspot
- Select 'Default On' for the Highspot Tab setting
- Save

Custom Tab Settings

Highspot

Highspot Configuration

The Highspot Tab will now be accessible to the Profiles you selected. You should also ensure you have set the Security for the supporting Visualforce Highspot page for these same Profiles. See the preceding section on Visualforce Page Security for details.

If you are using the Enhanced Profile user interface, follow these instructions:

- Setup > Administration Setup > Manage Users > Profiles
- Click on the profile you would like to enable the Highspot Tab for
- Click on Object Settings in the Apps Section

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Named Credential Access**
Permissions to authenticate against named credentials
- Custom Permissions**
Permissions to access custom processes and apps

- In the Object Settings, scroll down and click on Highspot

Highspot	--	--	Default On	--
Highspot Configuration	--	--	Default On	--

- Click Edit and change the Tab Settings to Default On

Profile

Account Executive

✕
Clone
Delete
Edit Properties

[Profile Overview](#) > [Object Settings](#)

Highspot

Highspot

Save Cancel

Tab Settings

Default On

- Click Save

Visualforce Tab Security (Lightning)

To add the Highspot tab in Lightning's default view, take the following steps:

- Log into Salesforce as an Admin
- Setup > Apps > App Manager
- Find the Sales app (LightningSales), click on the down arrow and select Edit


SETUP
Lightning Experience App Manager

[New Lightning App](#)
[New Connected App](#)

12 items • Sorted by App Name • Filtered by TabSet Type •

	APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED DATE	APP TYPE	VISIBLE IN LIGHTNI...	
1	App Launcher	AppLauncher	App Launcher tabs	5/15/2017 12:32 PM	Classic	✓	▼
2	Community	Community	Salesforce CRM Commu...	5/15/2017 12:32 PM	Classic	✓	▼
3	Content	Content	Salesforce CRM Content	5/15/2017 12:32 PM	Classic	✓	▼
4	Highspot	Highspot	OAuth credentials for Hi...	8/31/2017 5:23 PM	Connected (Managed)		▼
5	Highspot Latest	Highspot_Latest	OAuth credentials for Hi...	8/31/2017 5:23 PM	Connected (Managed)		▼
6	Marketing	Marketing	Best-in-class on-deman...	5/15/2017 12:32 PM	Classic	✓	▼
7	Platform	Platform	The fundamental Force....	5/15/2017 12:32 PM	Classic		▼
8	Sales	Sales	The world's most popul...	5/15/2017 12:32 PM	Classic		▼
9	Sales	LightningSales	Manage your sales proc...	5/15/2017 12:32 PM	Lightning	✓	▼
10	Salesforce Chatter	Chatter	The Salesforce Chatter s...	5/15/2017 12:32 PM	Classic	✓	▼ Edit
11	Service	Service	Manage customer servic...	5/15/2017 12:32 PM	Classic	✓	▼
12	Site.com	Sites	Build pixel-perfect, data...	5/15/2017 12:32 PM	Classic		▼

- In the Edit App window, click on Select Items in the top ribbon. Select Highspot and add it to the Selected Items column. Rearrange your tabs accordingly and click Save.

Edit App

APP DETAILS & BRANDING
APP OPTIONS
UTILITY BAR
SELECT ITEMS
ASSIGN TO USER PROFILES

Select Items

Choose the items to include in the app. You can rearrange the order in which items appear.

Available Items

- App Launcher
- Approval Requests
- Assets
- Contracts
- Forecasts
- Highspot Configuration
- Orders
- Price Books
- Products
- User Provisioning Requests

Selected Items

- Home
- Opportunities
- Highspot
- Leads
- Tasks
- Files
- Accounts
- Contacts
- Campaigns
- Dashboards
- Reports
- Chatter

▶

◀

▲

▼

Cancel

Save

APPLYING THE LIGHTNING COMPONENT

In addition to the Visualforce page elements, Highspot also has a Lightning component that can be installed and used within Salesforce Lightning's object layout pages. There are a couple of key requirements that need to be met in order for Lightning components to work. Here is a [video walkthrough](#) for reference.

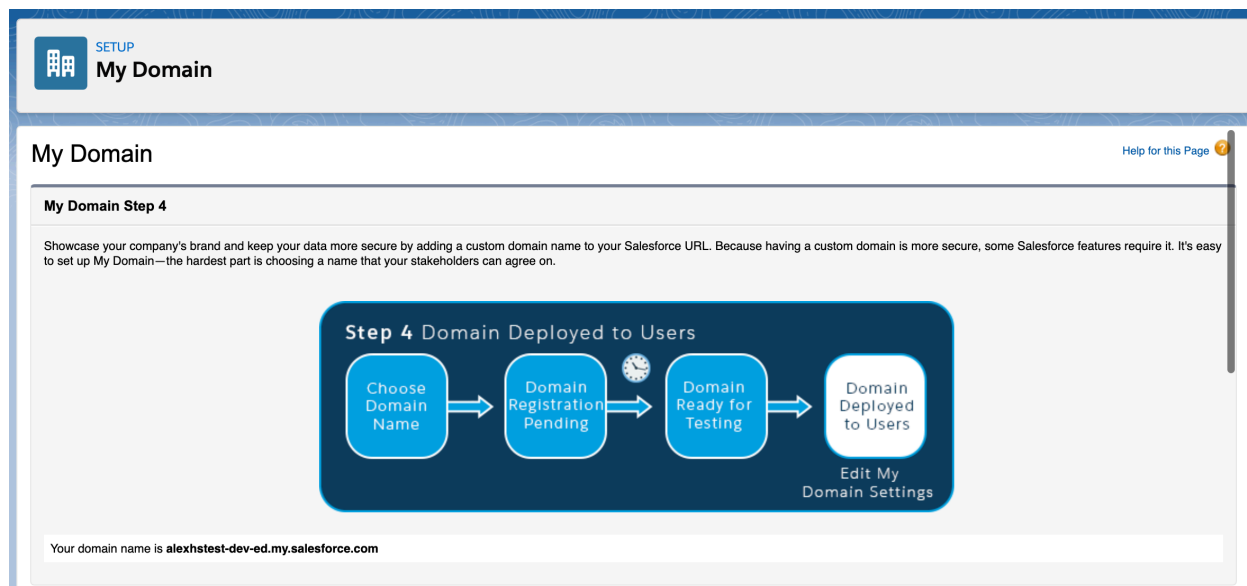
Requirements

- Salesforce instance must have a custom URL for the domain
- Highspot Salesforce Lightning package v2.59 or newer. Updating the package will not affect existing Visualforce page components. The v2.61 package is in the AppExchange.

Upgrading Salesforce to Use a Custom URL

Before you can set up a Lightning component tab or details page, you will need to upgrade the Salesforce instance to use a custom URL (if the environment does not already use one). The following steps will complete this action:

- Go to Setup while in Lightning
- Type 'My Domain' into the "Quick Find"
- Define a unique URL for your domain
- Login to your domain
- Click the Deploy to users to activate your custom domain



The screenshot shows the 'My Domain' setup page in Salesforce. At the top, there's a 'SETUP My Domain' header. Below it, the page title is 'My Domain' with a 'Help for this Page' link. The main content area is titled 'My Domain Step 4'. It contains a paragraph explaining the purpose of a custom domain: 'Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on.' Below this is a process flow diagram for 'Step 4 Domain Deployed to Users'. The flow consists of four steps: 'Choose Domain Name', 'Domain Registration Pending' (with a clock icon), 'Domain Ready for Testing', and 'Domain Deployed to Users'. Arrows connect these steps in sequence. Below the flow, there is a button labeled 'Edit My Domain Settings'. At the bottom, a text box displays the domain name: 'Your domain name is alexhstest-dev-ed.my.salesforce.com'.

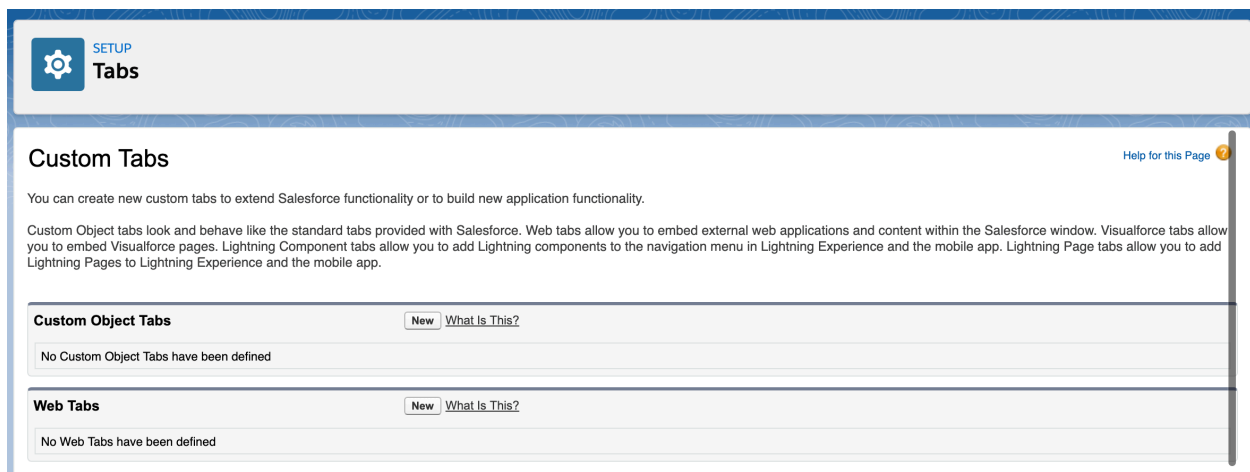
If you have not done it already, you will need to run the following admin task to set the customer's custom URL for Highspot:

```
salesforce:set_custom_domain[domain, custom_domain]
```

Adding the Highspot Content Tab

To add the Highspot tab into a Lightning instance using the component, take the following steps:

- Go to Setup while in Lightning
- Type 'Tabs' into the "Quick Find"
- Select 'Tabs'



- You should see a Lightning Page Tabs section on the Tabs Setup page
- Click 'New' in the Lightning Component Tabs section
 - Choose 'highspot:HighspotContent' in the Lightning Component dropdown
 - Set the Label to display in the Tab (e.g. Highspot Content)
 - Set the Name of the Tab (e.g. Highspot_Content)
 - Choose a Style for the Tab
 - Provide optional Description for the Tab

New Lightning Component Tab

Step 1. Enter the Details

Choose the component for this new tab. Fill in other details.

Lightning Component

Tab Label

Tab Name

Tab Style

Description

- Enable for the users you want to see the Highspot Content Tab
- Click 'Save'

New Lightning Component Tab

[Help for this Page](#)

Step 2. Add to Profiles

Step 2 of 2

Choose the user profiles for which the new Lightning Component tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

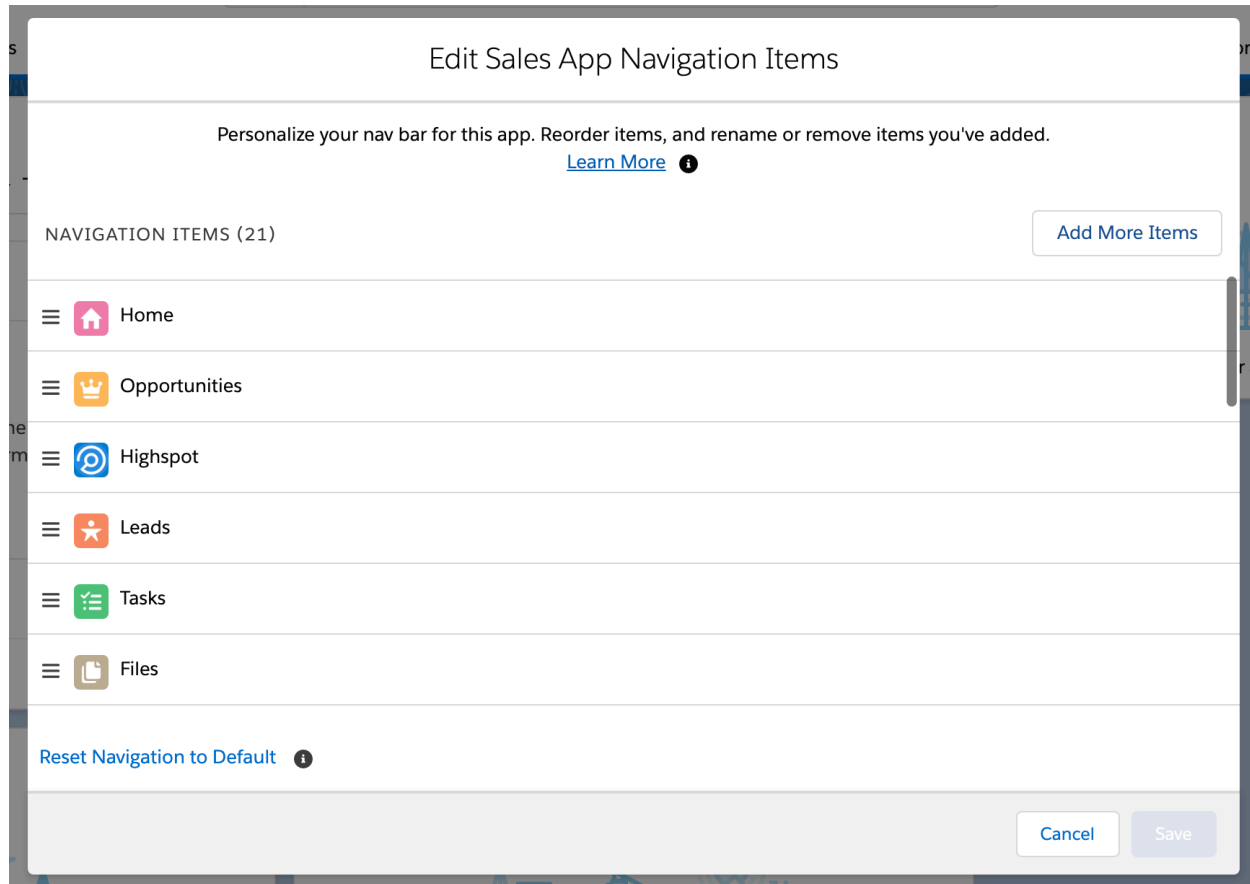
☐ Apply one tab visibility to all profiles

☒ Apply a different tab visibility for each profile

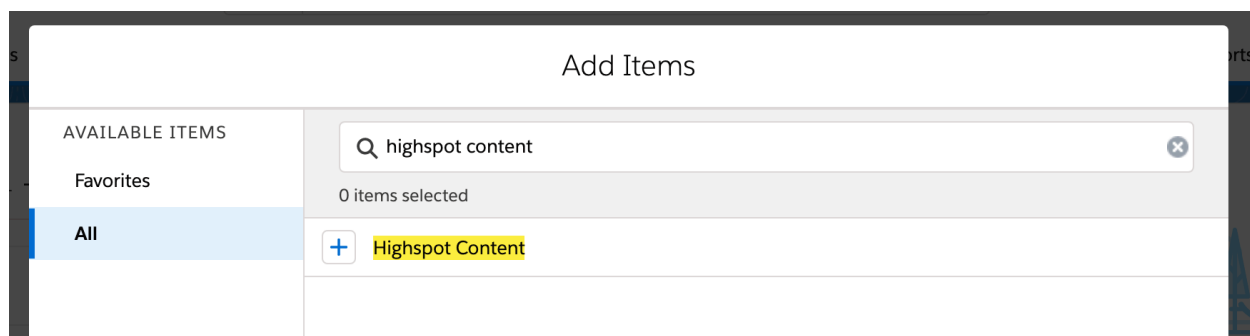
Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On

You have created a Highspot Content Tab which you can configure in your Apps. Individual users will need to take the following steps to add the content tab to their ribbon:

- Click the Edit pencil in the upper right corner of the page (in your ribbon)



- Click 'Add More Items' button
- Click 'All' to display all the available Tabs
- Add the Lightning Tab the you just created for display Highspot Content. Click Add.

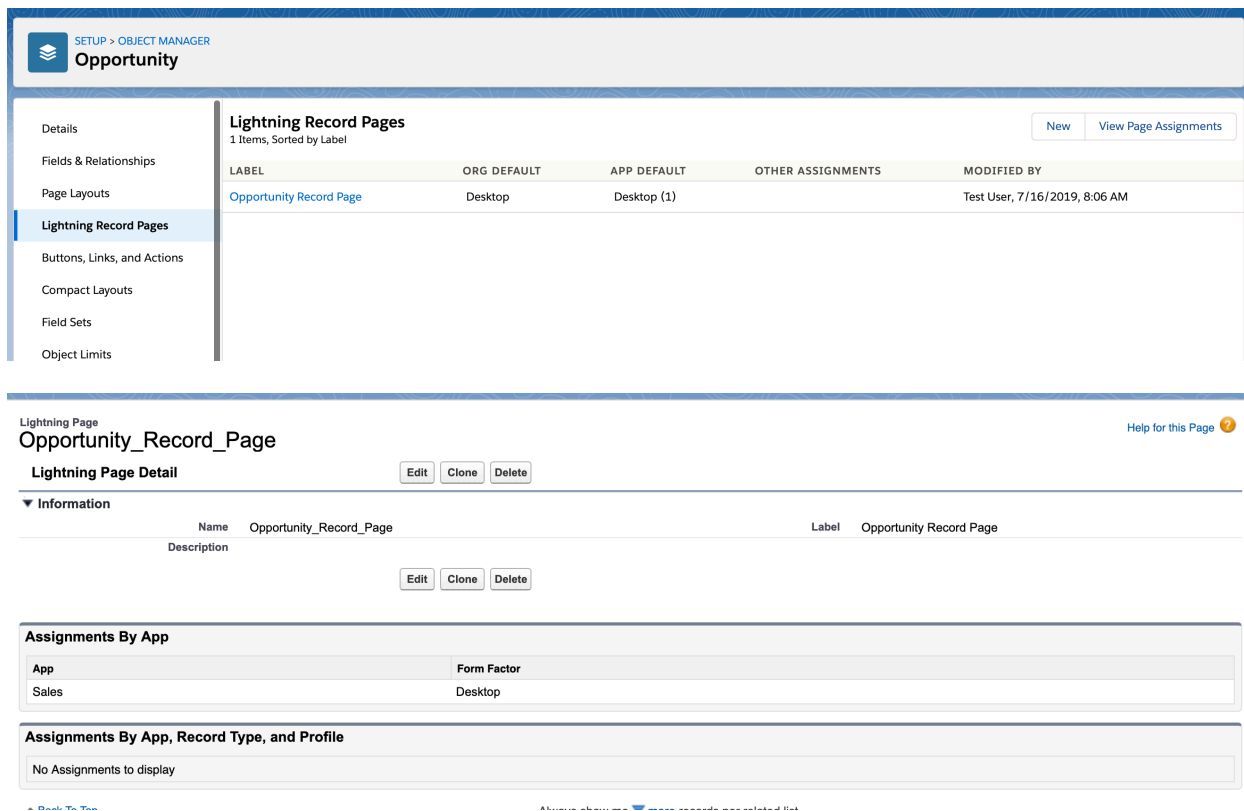


- Drag the Tab into the order you want it to appear in the Navigation bar
- Click 'Save'

Adding the Lightning Component to an Object Layout's Details Page

Similar to the Visualforce page element, the Lightning component can be used to surface the Highspot Content section on an opportunity layout for Opportunities, Accounts, Leads, Contacts, and/or Quotes.

- In Setup, type in Object Manager into the Quick Find
- Click on the Object you want to add Highspot to. In that Object's settings, click on Lightning Record Pages. Click Edit.



The screenshot shows the Salesforce Setup interface for configuring Lightning Record Pages for the Opportunity object. The left sidebar lists various configuration options, with 'Lightning Record Pages' selected. The main area displays a table of existing record pages, with one page named 'Opportunity Record Page' configured for the Desktop form factor. Below the table, the 'Lightning Page Detail' section shows the page's name and label. The 'Assignments By App' section shows the page is assigned to the Sales app with a Desktop form factor. The 'Assignments By App, Record Type, and Profile' section shows no assignments.

LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNMENTS	MODIFIED BY
Opportunity Record Page	Desktop	Desktop (1)		Test User, 7/16/2019, 8:06 AM

Lightning Page Detail

Name	Label
Opportunity_Record_Page	Opportunity Record Page

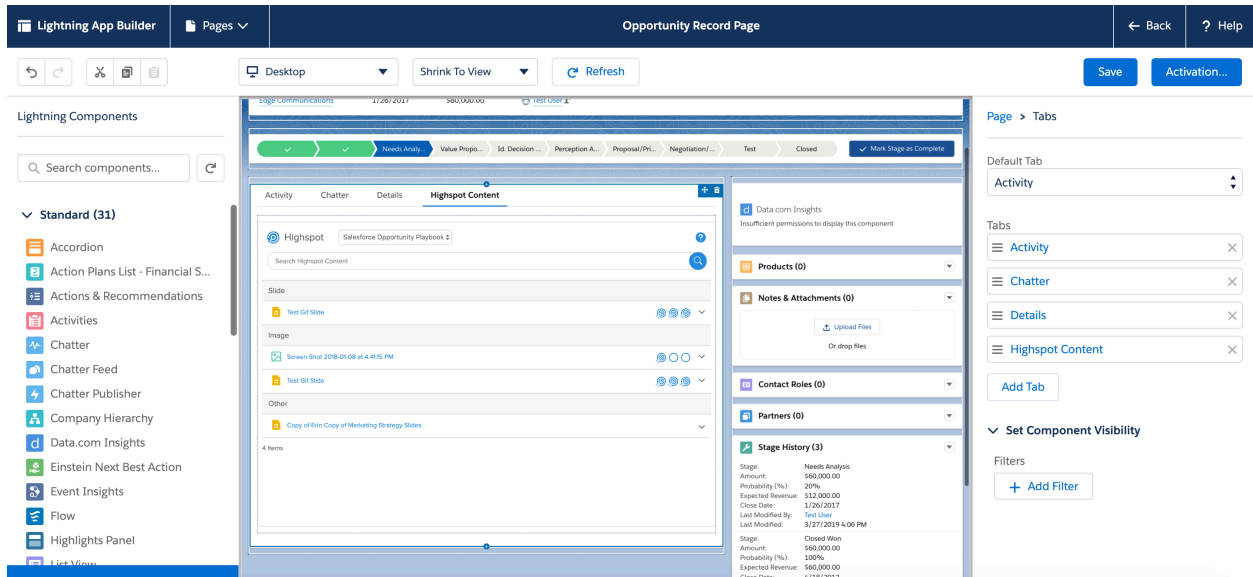
Assignments By App

App	Form Factor
Sales	Desktop

Assignments By App, Record Type, and Profile

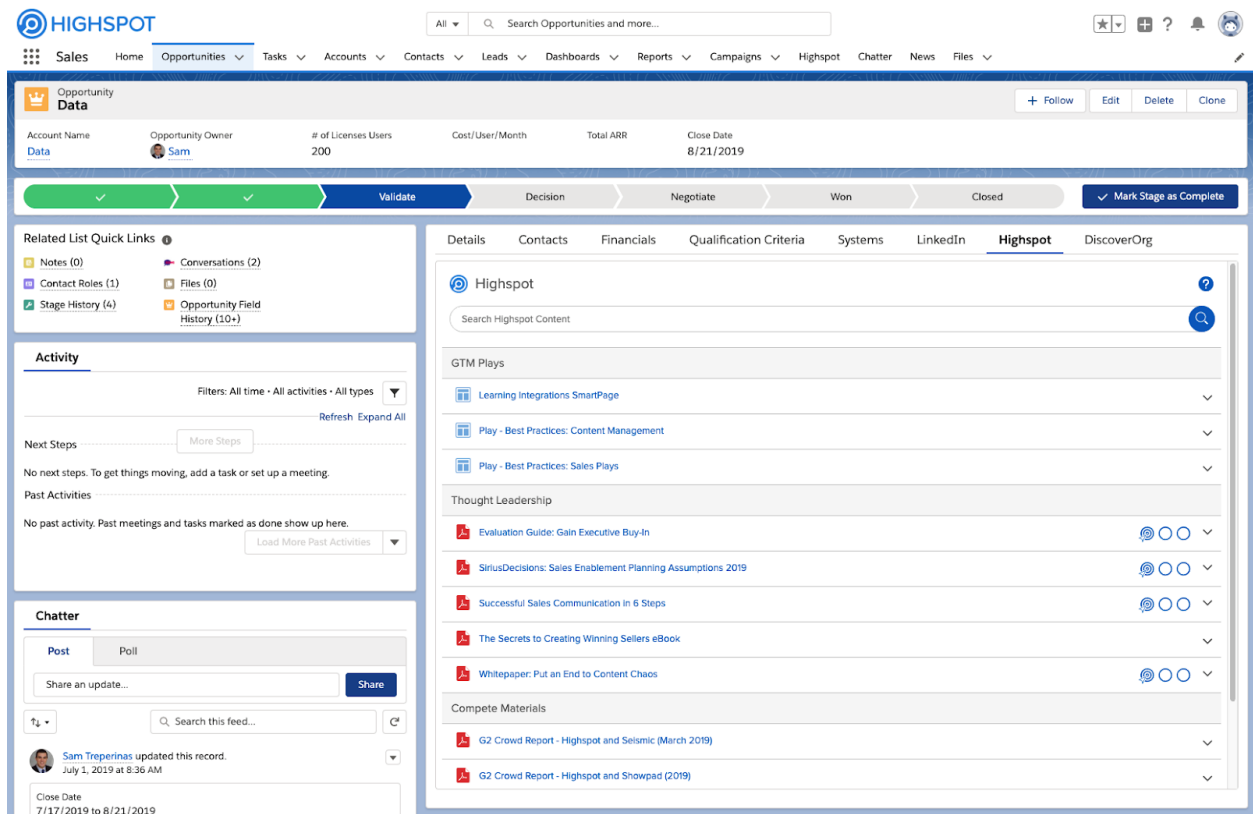
No Assignments to display

- In the left sidebar, under the 'Custom - Managed' section, the HighspotContent component should be available
- Drag the "HighspotContent" onto the page where you want it displayed
- Configure the 'Height' property for the component in the right sidebar
- Configure the 'Tab Name' property for the component to the Name of the Tab you created previously (e.g. Highspot_Content)



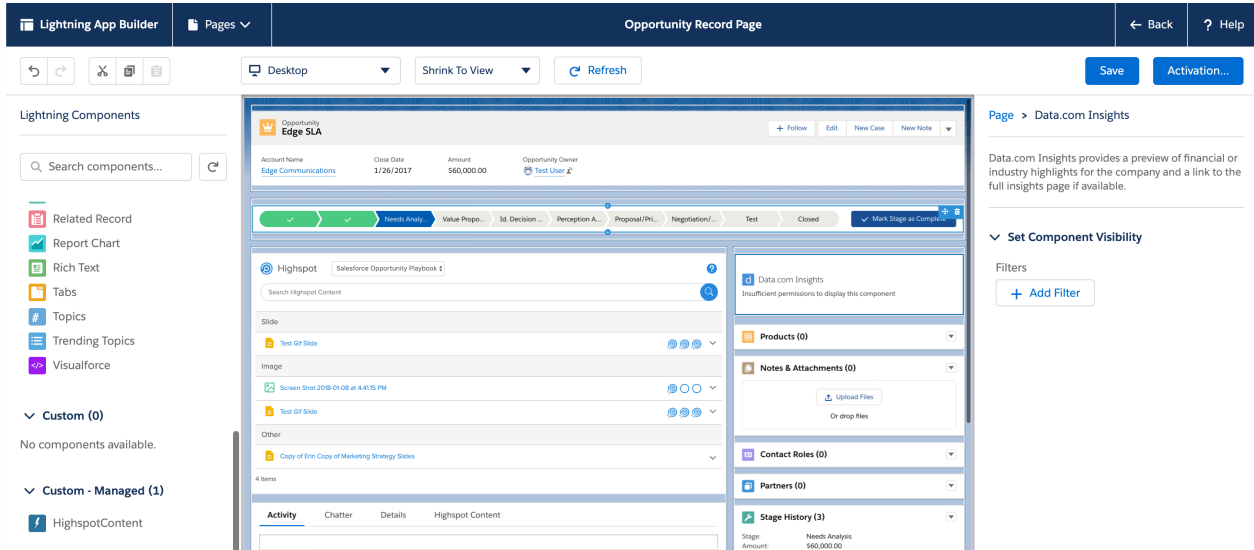
The screenshot shows the 'Opportunity Record Page' configuration in the Highspot Lightning App Builder. The interface includes a top navigation bar with 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. Below this is a toolbar with 'Desktop', 'Shrink To View', and 'Refresh' buttons. The main area displays a preview of the page layout, which includes a 'Highspot Content' section with a search bar and a list of items. On the right, there are tabs for 'Activity', 'Chatter', 'Details', and 'Highspot Content'. The 'Highspot Content' tab is currently selected, showing a list of items with details like 'Stage', 'Amount', 'Probability (%)', 'Expected Revenue', and 'Close Date'.

- Click 'Save' button
- Click 'Activate' to publish page (if not yet published)
- Assign page for appropriate user profiles



The screenshot shows the Highspot user interface for an 'Opportunity Data' record. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Tasks', 'Accounts', 'Contacts', 'Leads', 'Dashboards', 'Reports', 'Campaigns', 'Highspot', 'Chatter', 'News', and 'Files'. The 'Opportunity Data' record is displayed with fields for 'Account Name', 'Opportunity Owner', '# of Licenses Users', 'Cost/User/Month', 'Total ARR', and 'Close Date'. Below the record, there is a 'Related List Quick Links' section with links to 'Notes', 'Conversations', 'Contact Roles', 'Files', 'Stage History', and 'Opportunity Field History'. The 'Activity' section shows a timeline of activities with filters for 'All time', 'All activities', and 'All types'. The 'Chatter' section shows a feed of updates from other users. The 'Details' section shows a list of 'GTM Plays' and 'Thought Leadership' content.

The Highspot Lightning component can also be added as a separate layout item in the record page, not just as a tab in the activity/details section:



The screenshot shows the Highspot Lightning component integrated into a Salesforce Opportunity Record Page. The component displays a slide titled "Salesforce Opportunity Playbook" with a search bar and a list of items. The slide content includes a "Text GF Slide" and a "Screen Shot 2016-09-08 at 4:41:53 PM". The component is titled "Highspot" and "Salesforce Opportunity Playbook". The slide content includes a "Text GF Slide" and a "Screen Shot 2016-09-08 at 4:41:53 PM". The component is titled "Highspot" and "Salesforce Opportunity Playbook".

Note: for users to see the Highspot lightning component in this way, they must be BOTH already logged into their correct Highspot domain and have their Highspot and Salesforce accounts linked in Highspot.

PACKAGE UPDATES

Periodically there may be a package update made available on AppExchange to improve the customer experience or to add new features.

You can install a package update from AppExchange, repeating the same steps you did in the original installation. Being a version of an existing installed package, only those components that have been updated will be installed.

The Highspot Content pages you installed into your Opportunity, Lead, or Contact layouts should remain intact, and not require any reconfiguration, unless specifically called out in the release notes for the update.

The security of the Visual Force Pages should not need to be re-configured if you provided access to additional profiles. This is described in the previous section on Visualforce Page Security.

As noted previously, additional profiles should only be added for the Highspot Page and Highspot Content VisualForce pages. The Highspot Configuration VisualForce page should remain restricted to System Administrator only.

FAQ

What accounts are used in the integration?

To fully integrate Highspot and Salesforce, the two systems connect with each other in three different ways:

1. Salesforce $\square$ Highspot (system-to-system API connection)
2. Highspot $\square$ Salesforce (system-to-system API connection)
3. Highspot $\square$ Salesforce (user-to-user individual connection)

1. Salesforce $\square$ Highspot (system-to-system)

- **Configured** in Salesforce in the Highspot Configuration tab by entering credentials for the Salesforce User (ex *highspot-sfdc@company.com*)
- **Enables** targeting content by allowing the Salesforce API to invoke the Highspot API
- **Recommended** to use a normal user and not a Highspot admin so that admin privileges are not given to an external API caller

2. Highspot $\square$ Salesforce (system-to-system)

- **Configured** in Highspot by signing in as the Salesforce User (ex *highspot-sfdc@company.com*) and linking to one of their Salesforce accounts
- **Enables** using Salesforce data in Highspot analytics and Salesforce-bound Highspot groups
- **Recommended** to use an API User and not a Salesforce admin's account so that admin privileges are not given to an external API caller

3. Highspot $\square$ Salesforce (user-to-user)

- **Configured** in Highspot by linking to Salesforce in Cloud Services (each rep does this)
- **Enables** relating Highspot pitches to Salesforce records and background sync of Salesforce data

Using Highspot in Salesforce

- To use the Highspot tab in Salesforce, a user only has to be logged into Highspot in the same browser that they are using to access Salesforce. Since Highspot is an iframe in Salesforce, the login session will work from any tab.

APPENDIX

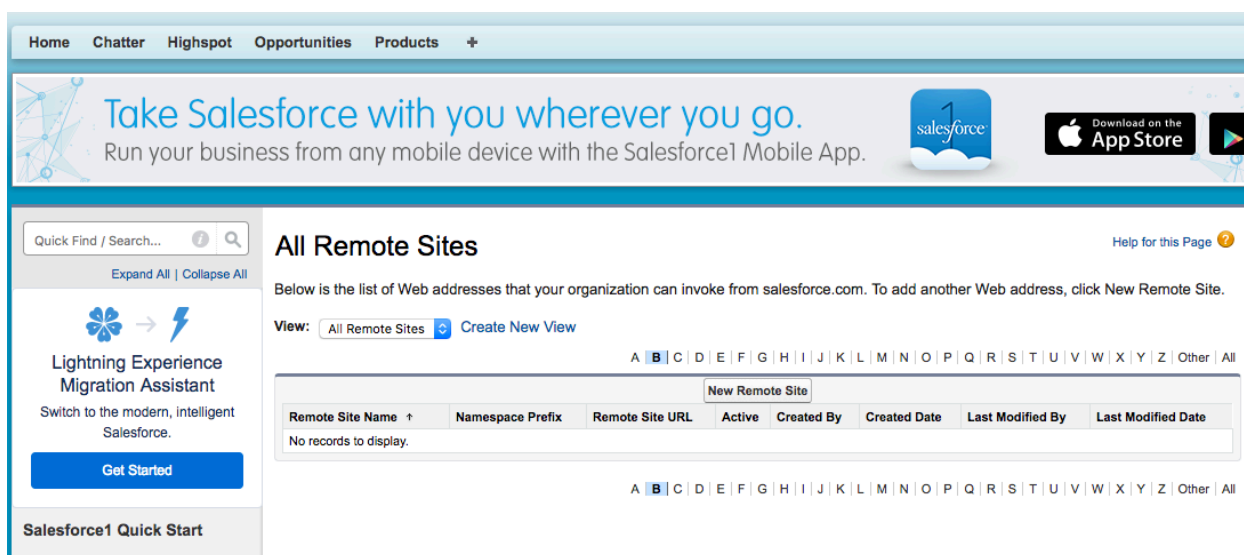
Configuration for package versions 2.62 and earlier

After package version 2.62, the component was updated to use a Named Credential for configuring the API user and credentials, as described previously. Prior to that, the package used the Highspot Configuration tab. If you are using package version 2.62 or earlier, you will need to configure the API user as follows:

Remote Site Settings

You must configure Salesforce to allow remote access to Highspot. This is done using the Remote Site Settings in Highspot and requires the Salesforce user to be a System Administrator.

- Log in to Salesforce as a System Administrator
- Setup > Security Controls > Remote Site Settings



- Click on New Remote Site
 - Remote Site Name: Highspot
 - Remote Site URL: <https://<subdomain>.highspot.com> (this should match the URL that you are using to access Highspot)
- Save

You have now configured Salesforce to allow access to the domain. You are ready to configure the API Settings.

Highspot Configuration in Salesforce

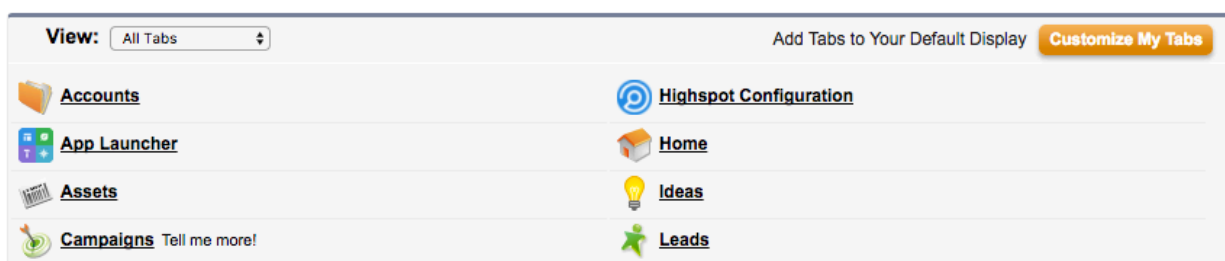
The next step is to configure the API Settings in Salesforce. The user must be a Salesforce System Administrator to configure the Highspot Connector.

- Log in to Salesforce as a System Administrator
- View all tabs by clicking on the + icon in the tabs ribbon
- Select the Highspot Configuration tab

All Tabs

[Help for this Page](#) ?

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.



- Enable the API using the checkbox
 - Using the information previously configured in your Highspot Company Salesforce Settings:
 - Enter the API URL for Highspot (this should match the URL you used above for Remote Site Settings)
 - Enter the email address of the Salesforce API User for Highspot (your Services Executive will provide this)
 - Enter the password of the Salesforce API User for Highspot (your Services Executive will provide this)
 - Save Changes

You will know your API connection is set up when a green check marked Connection Verified message appears.

Sync Status*Last synced 8 days ago*[Sync to Highspot](#)**Highspot API Settings**[Save Changes](#)Enable API ☒API URL API User API Secret  Connection Verified — your Highspot API settings are properly configured!

If you have any issues or get a message that is anything other than “Connection Verified”, your Services Executive can help you diagnose and resolve the issue.