



Salesforce App Exchange

Installation Guide for
vPlaybook App

RELEASE NOTE

This document consists of a functional walkthrough, an installation and configuration guide, and a Salesforce Navigation guide.

Table of Contents

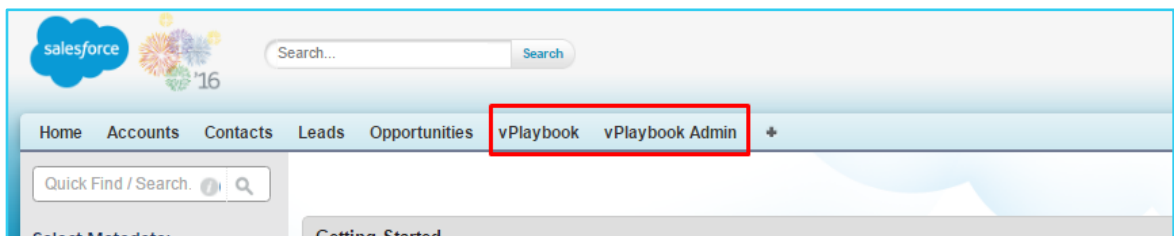
- Requirements
- General Use Case & Functionality
- Installing the vPlaybook App
- Configuring the vPlaybook App

REQUIREMENTS

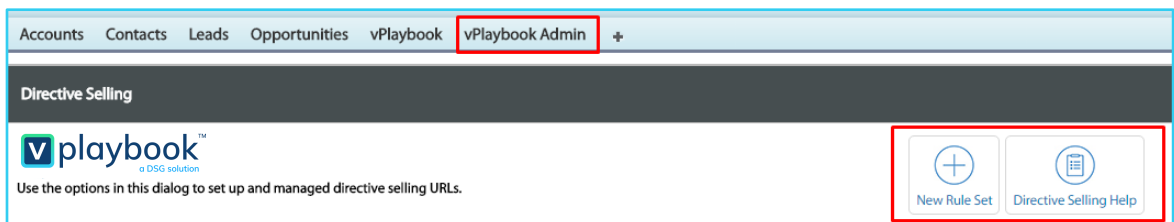
1. Salesforce integration with vPlaybook
2. Salesforce Enterprise/Platform/Developer/Unlimited
3. Administrator access to Salesforce

GENERAL USE CASE & FUNCTIONALITY

1. The user logs in to Salesforce.
2. The user lands on the app homepage and can see the two tabs created - [vPlaybook](#) and [vPlaybook Admin](#), as highlighted below:



3. The user clicks on the [vPlaybook Admin](#) tab and is brought to the vPlaybook ruleset page, as shown below:



- From here, the user can define a new rule set by clicking on the [New Rule Set](#) button. The user must add a [Description](#), select the [Rule Set Object](#) (Account, Contact, Lead, or Opportunity), and click the checkbox next to the [Active](#) option in order to ensure the new rule set is active.

Directive Selling

vplaybook™
a DSG solution

Use the options in this dialog to set up and managed directive selling URLs.

Description:

Rule Set Object: --None--

Active: ☒

Rule Set: Test Rule Set for Lead - (CORP)

- In this instance, the user selects Contact as the Rule Set Object. Once selected, the user is presented with [Rule Details](#), which include fields, operators, values, and URLs that should be included. The user can also see [Filter Logic](#). If any filter logic needs to be defined, the user can do so, but default functionality is set as (& AND).

Rule Set: Test Rule set for contact

Description: Test Rule set for contact

Rule Set Object: Contact

Active: true

Rule Details:

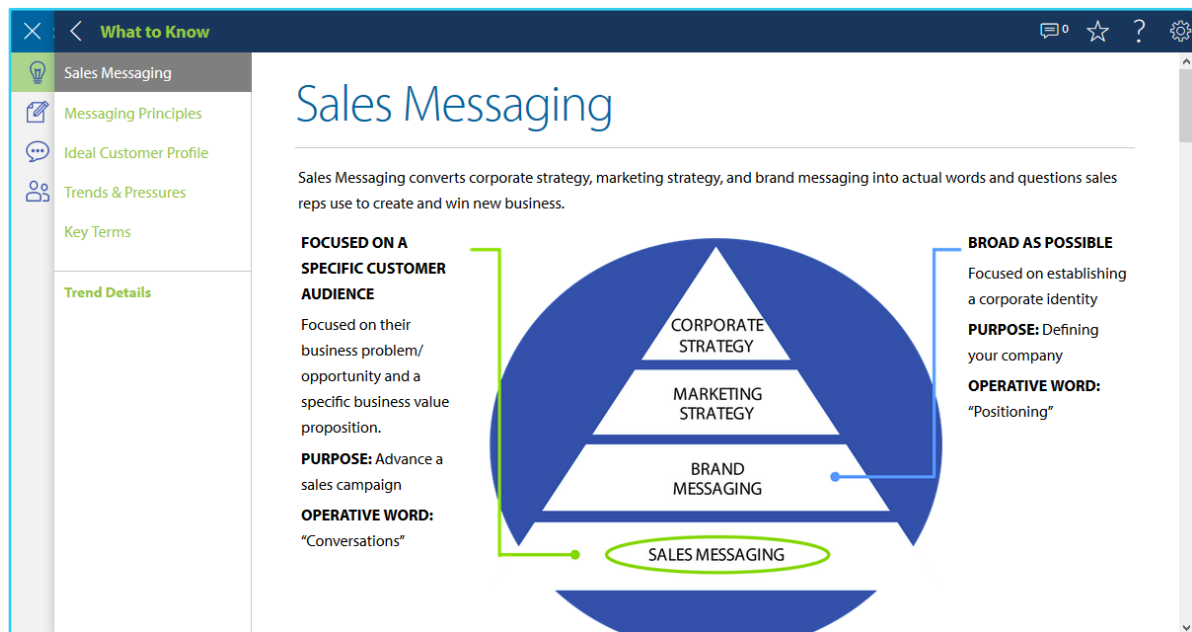
Field	Operator	Value	URL
1. Assistant's Name	starts with	Test	
2. Email	equals	ravideeps@grazitti.com	
3. Department	less than	500	
4. Level	not equal to	Secondary	https://dev.vplaybook.com/playbook/2287/page/88079

Filter Logic: 1AND2AND3AND4

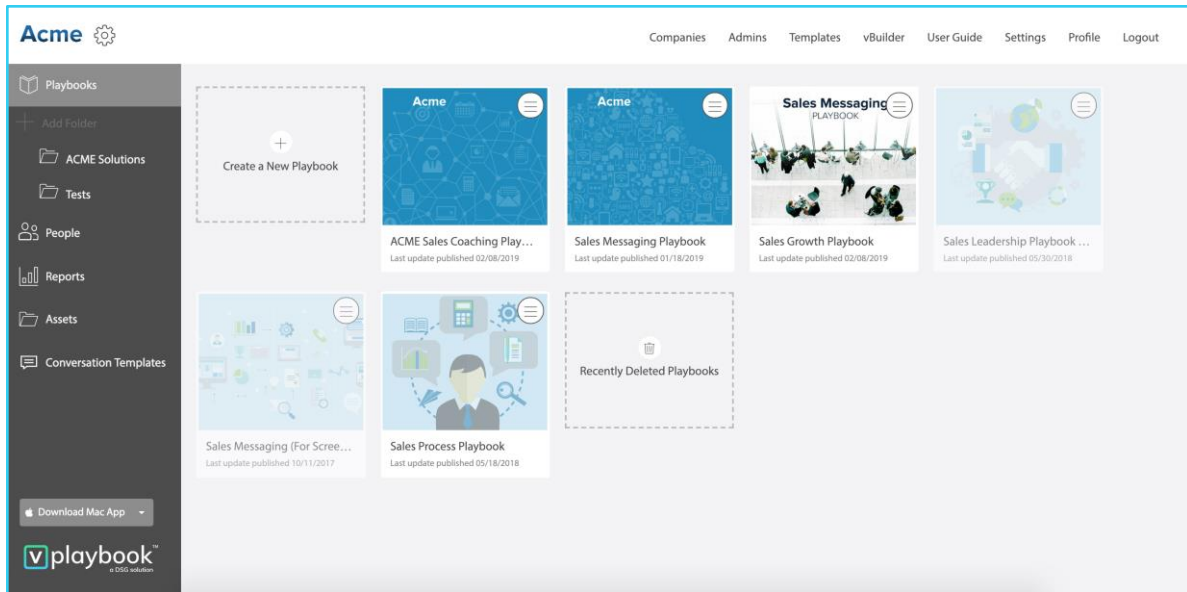
- The user has defined a rule set for contacts with operators and values defined above. To check it, the user can click the Contact tab and create a new contact with the fields containing the above information and click Save. The user is then redirected to the [Contact Detail](#) page, where the information is displayed as specified:

Contact Detail		Edit Delete Clone Request Update vPlaybook	
Contact Owner	App vPlaybook [Change]	Phone	
Name	Dummy First Dummy Last	Home Phone	
Account Name	Grazitti	Mobile	
Title		Other Phone	
Department	499	Fax	
Birthdate		Email	ravideeps@grazitti.com
Reports To	View Org Chart	Assistant	Test
Lead Source		Asst. Phone	
TestField	☐		
TestArea			
TestDateTime			
TestPercent			
Mailing Address	Panchkula	Other Address	
Languages		Level	Tertiary
Created By	App vPlaybook , 8/3/2016 2:27 AM	Last Modified By	App vPlaybook , 8/3/2016 2:27 AM
Description			

- Upon clicking the vPlaybook button and meeting all the rule set criteria, the user is redirected to the Canvas app homepage internal link, as shown below.



- Conversely, if the rule criteria don't match, the user will be redirected (for testing purposes) to the following page:

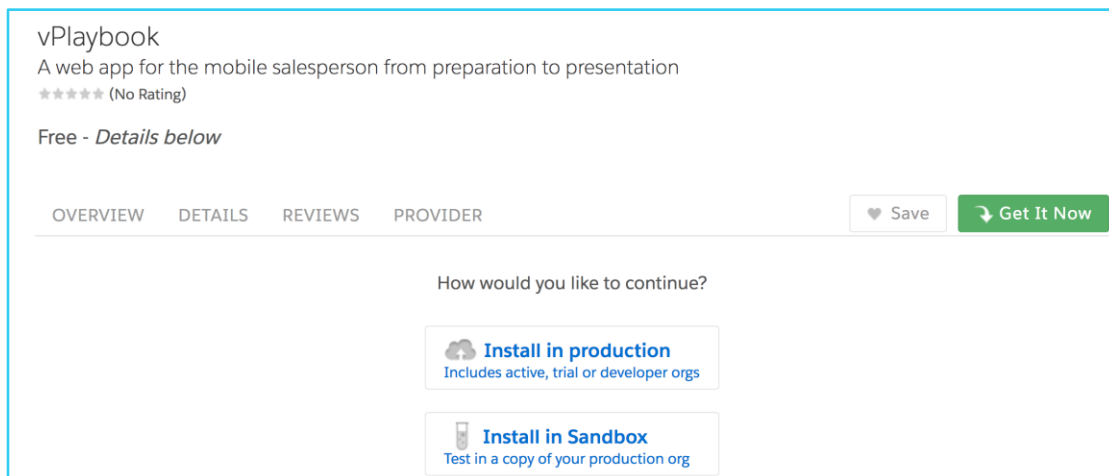


9. Similarly, the user can define the rule set on other objects as well, such as Leads, Account, and Opportunities.

INSTALLING THE vPLAYBOOK APP

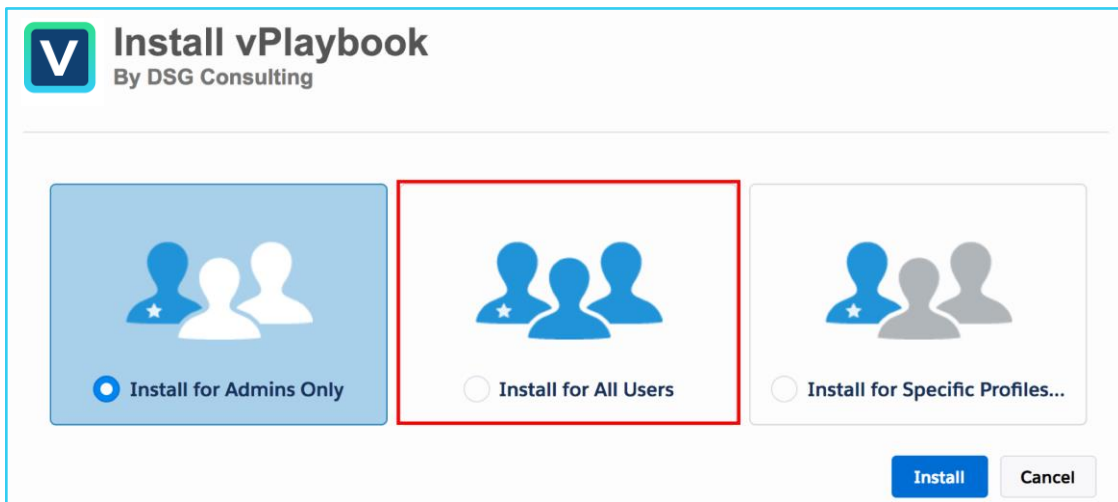
To install the vPlaybook App, follow these steps:

1. Log into Salesforce as a Salesforce System Administrator for your company to install the package.
2. Click an [Install](#) option on the vPlaybook app page from AppExchange.

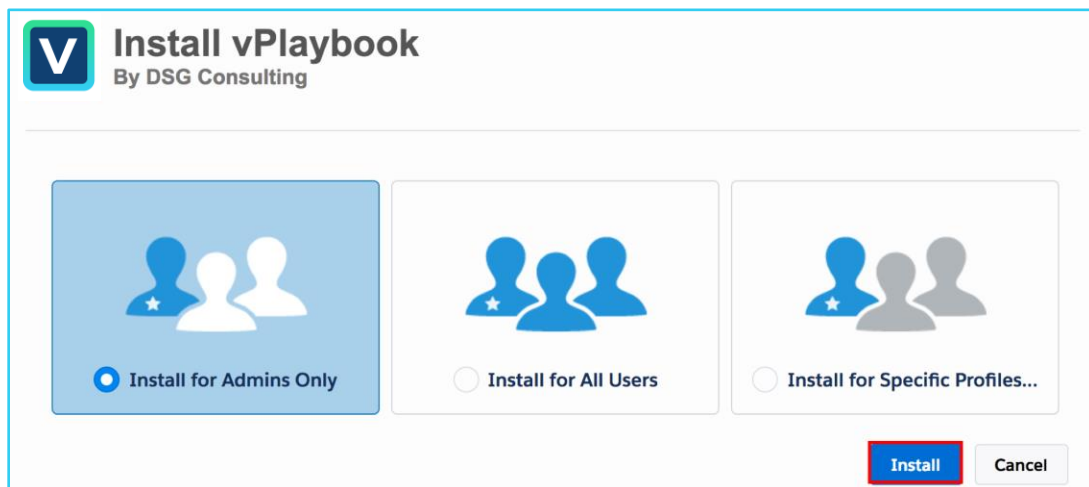


3. Approve the Package API Access by clicking [Next](#).

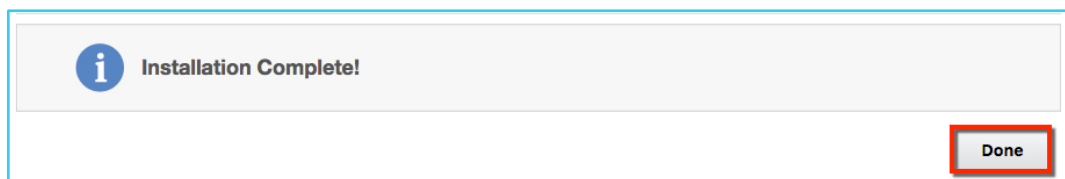
- Click [Install for All Users](#).



- Click [Install](#).



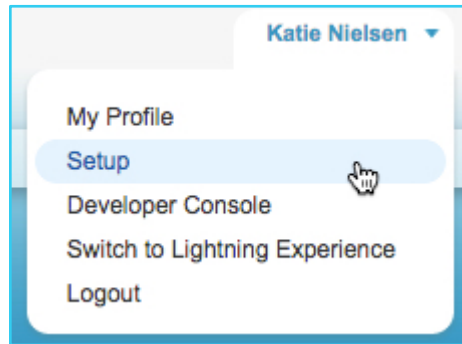
- Allow the package to install. You should receive confirmation when the package has been installed. Click [Done](#).



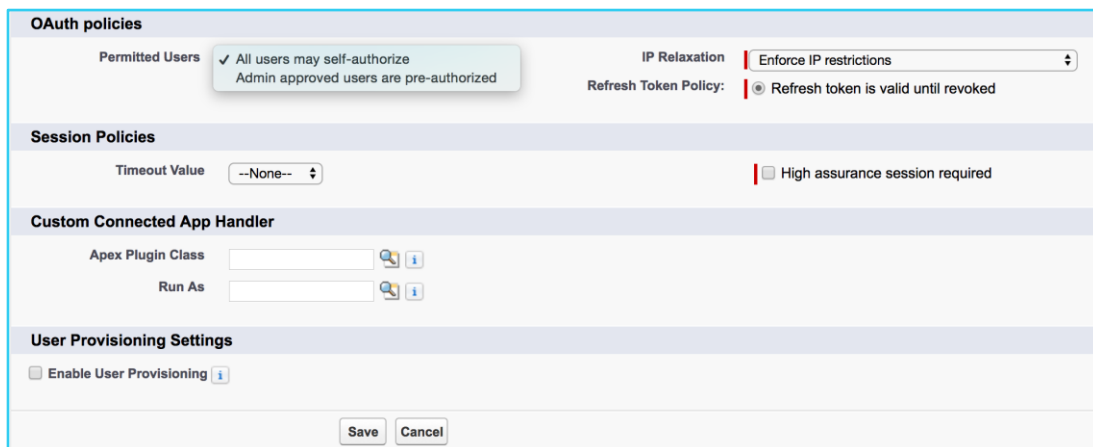
CONFIGURING THE vPLAYBOOK APP

To configure the vPlaybook App, follow these steps:

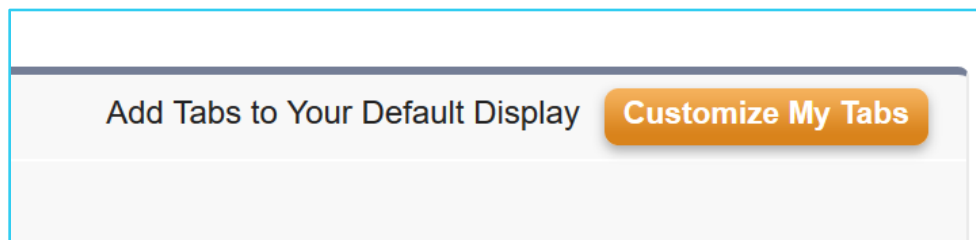
1. Log into Salesforce as a Salesforce Administrator.
2. In the top-right corner, click your name and click the [Setup](#) button.



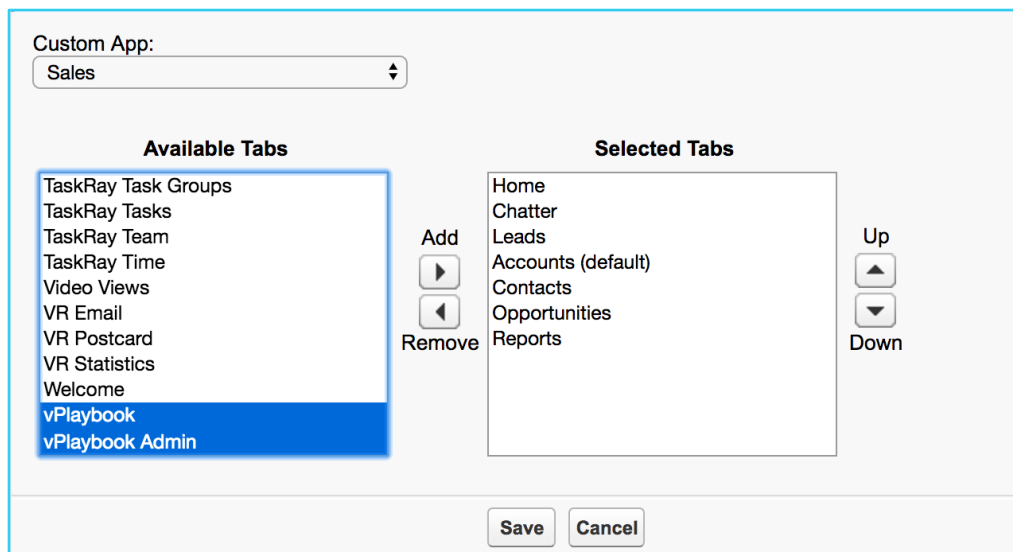
3. In the left menu, under "Administration Setup", click [Manage Apps](#).
4. Click [Connected Apps](#).
5. Find vPlaybook and click the [Edit](#) link to the left.
6. Under "OAuth Policies", set the [Permitted Users](#) to "Admin approved users are pre-authorized".
7. Click [Save](#).

A screenshot of the Salesforce 'Connected App' configuration page for 'vPlaybook'. The page is divided into several sections: 'OAuth policies' with 'Permitted Users' set to 'All users may self-authorize' and 'Admin approved users are pre-authorized'; 'Session Policies' with 'Timeout Value' set to '--None--' and 'High assurance session required' unchecked; 'Custom Connected App Handler' with 'Apex Plugin Class' and 'Run As' fields; and 'User Provisioning Settings' with 'Enable User Provisioning' unchecked. At the bottom are 'Save' and 'Cancel' buttons.

8. Navigate to the vPlaybook [Connected App](#) detail page (Administration Setup > Manage Apps > Connected Apps > vPlaybook).
9. Choose which users will have access to vPlaybook.
 - a. To allow access by Profile, click [Manage Profiles](#) and select the appropriate profile and click [Save](#).
 - b. To allow access by Permission Set, click [Manage Permission Sets](#) select the appropriate [Permission Sets](#) and click [Save](#).
10. Next, go to your navigation tab options by clicking the + in the tab bar.
11. Click the [Customize My Tabs](#) button.

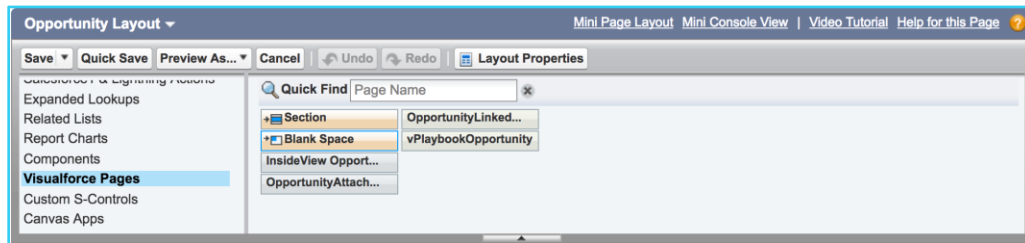


12. Select [vPlaybook](#) in the right box, add it to the left box, and click [Save](#).

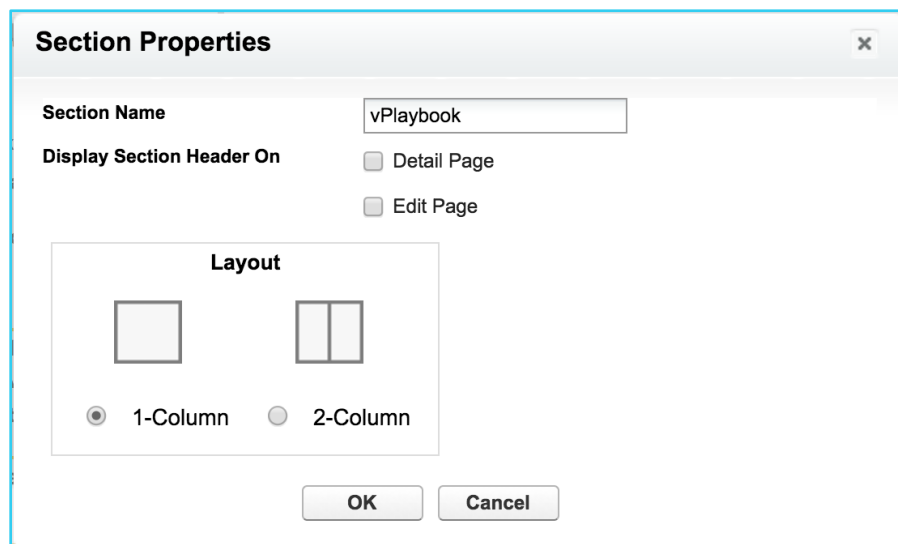


13. Now it's time to add vPlaybook content to a Page Layout within Salesforce. To start this process, click the [Opportunities](#) tab.

14. Open a specific opportunity record.
15. Click [Edit Layout](#).
16. Select the appropriate layout from the [Opportunity Layout](#) dropdown menu.

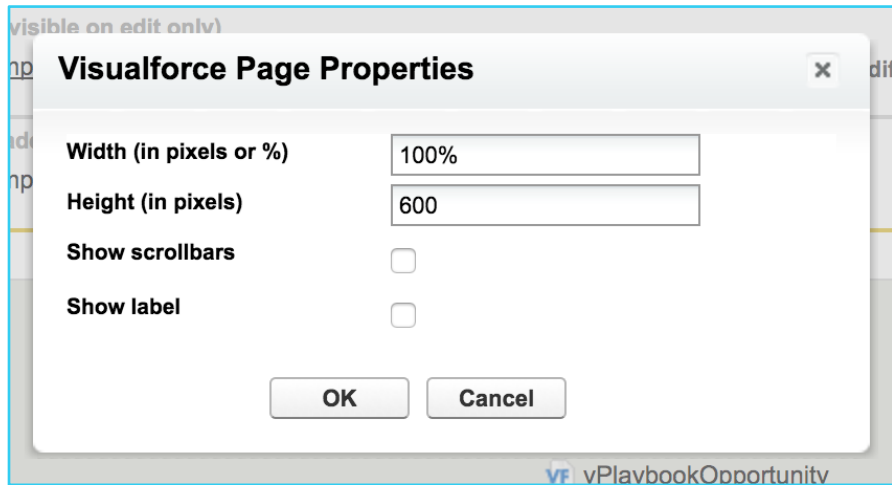


17. In the scrollable list on the left, click [Visualforce Pages](#).
18. Click and drag a section element to the position in the [Opportunity Layout](#) where vPlaybook content should be displayed.
19. Configure the section's properties like this:
 - a. Section Name: [vPlaybook](#)
 - b. Layout: 1-Column
 - c. Make sure [Detail Page](#) and [Edit Page](#) are unchecked.
20. Click [OK](#).



21. Click and drag the [vPlaybook Content](#) to the [vPlaybook](#) section you just added.

22. Click the properties icon top right corner of the Visualforce page you just added.
- Set the page's height to 295 px.
 - Click [OK](#).



23. Save the layout. Playbook should now be displayed in your Opportunity Layout.