TicketManager WHERE TICKETS MEAN BUSINESS for salesforce

INSTALLATION AND CONFIGURATION

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TicketManager WHERE TICKETS MEAN BUSINESS

TicketManager for Salesforce

Installation and configuration

A. Before you install
B. Package installation details
C. Application activation (API key)
D. Application configuration (For Classic and Lightning Orgs)
E. User account settings
F. Upgrading from previous versions

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A – BEFORE YOU INSTALL

High-level capabilities and good to knows:

- TicketManager is a Managed Package
  - Updates are released every 6 weeks.
  - The application can be used to request tickets on Salesforce Mobile
- TicketManager can integrate on the Invitee Level with:
  - Users
  - Opportunities
  - Accounts
- TicketManager can integrate on the Invitee Level with:
  - Contacts
  - Leads
  - Users
  - Person Accounts
  - Custom Objects
- TicketManager comes with the following Custom Objects to ensure reporting and core functions of the application. The objects include:
  - Batch Error Log
  - TMS Attendee
  - TMS Cart Request
  - TMS Event
  - TMS Field Mapping
  - TMS Invitation History Cache
  - TMS Invitee
  - TMS Order
  - TMS Ticket
  - TMS Ticket Level Admin
  - TMS User

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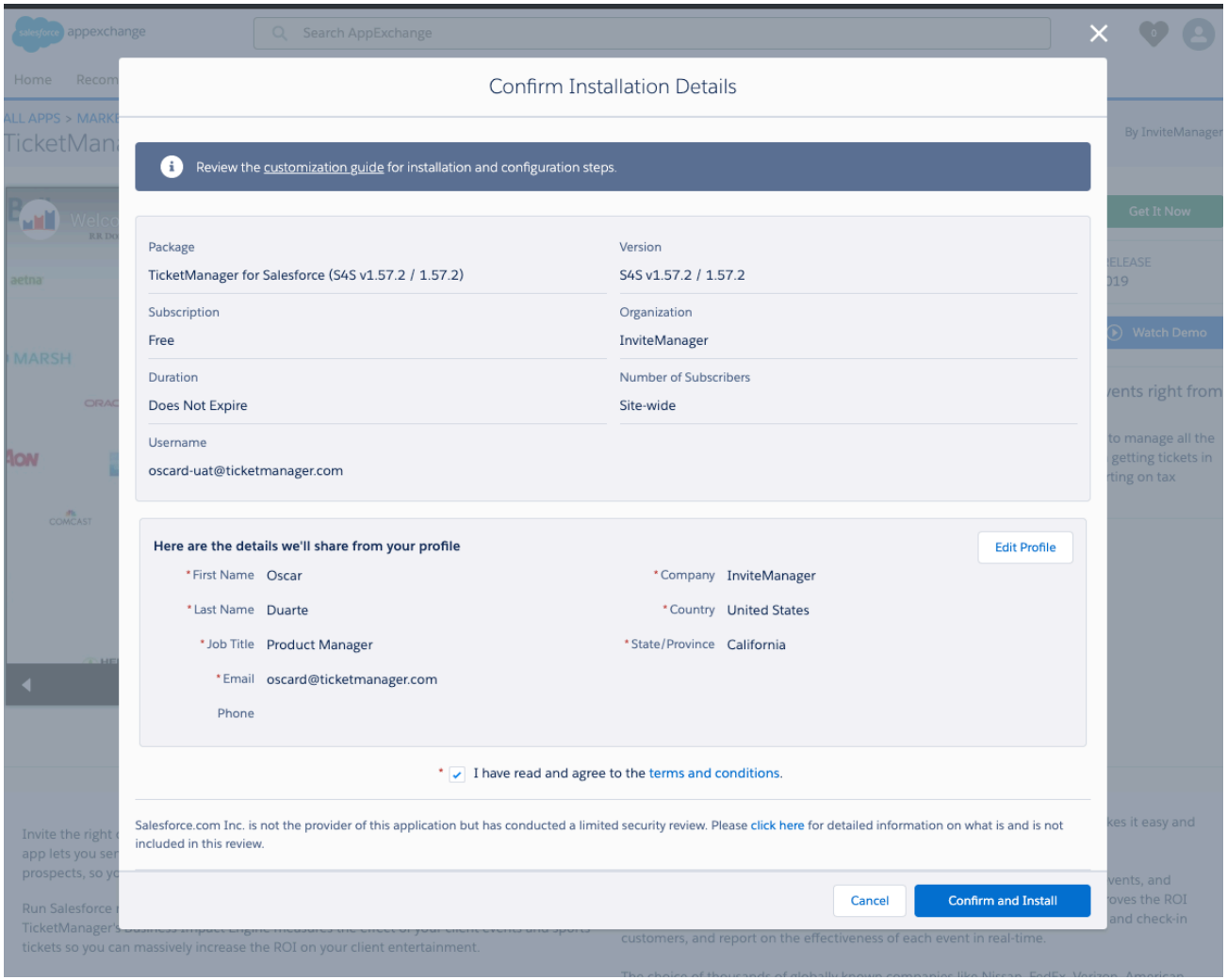
B.1 - PACKAGE INSTALLATION DETAILS

- From your browser, access the AppExchange to install the TicketManager for Salesforce package to begin the process. Click on "Get It Now"
- If you are not logged into Salesforce provide your credentials and choose where to install the application.
- Once you see the screen below Agree to the Terms and Conditions and click “Confirm and Install”



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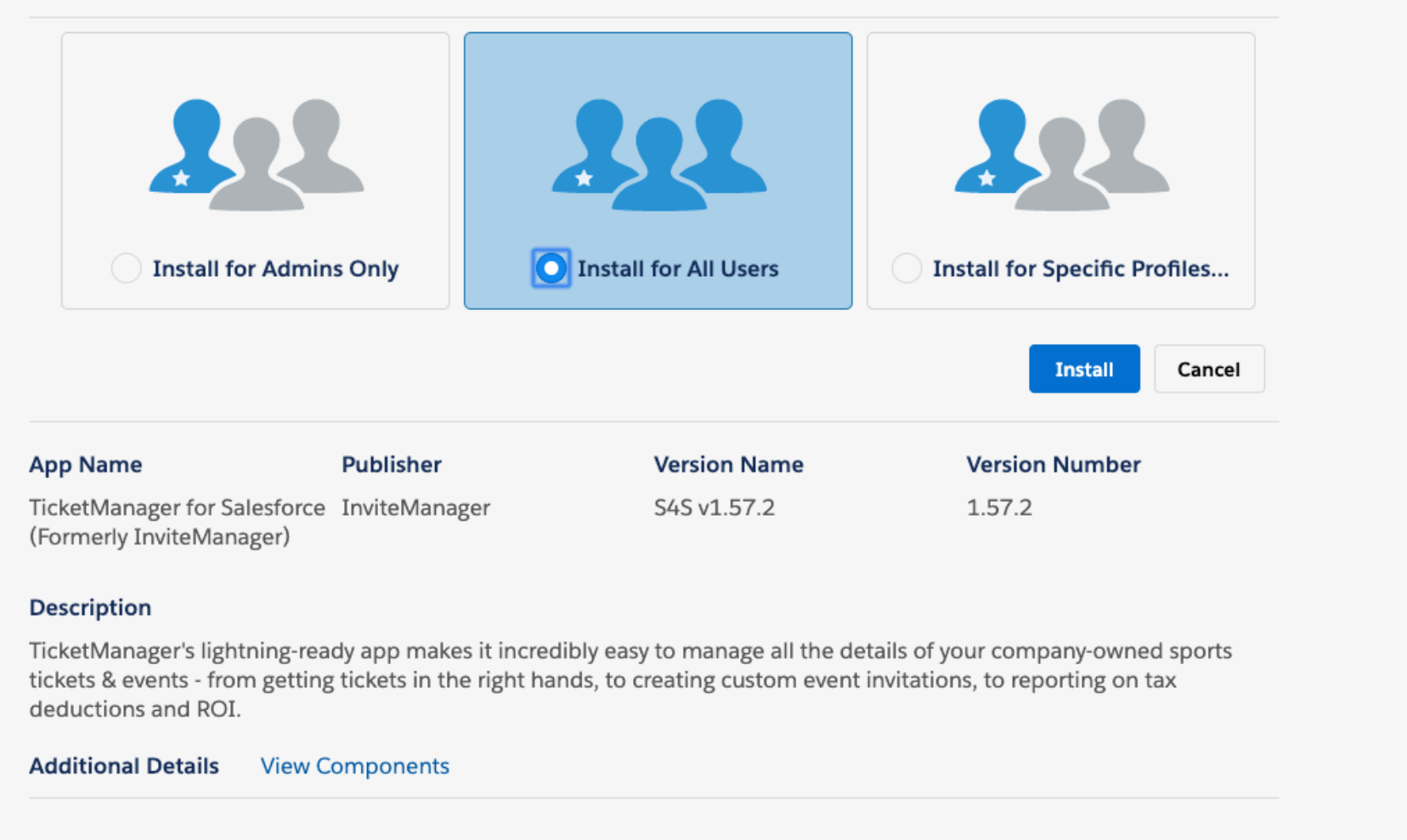
B.2 - CHOOSE SECURITY LEVEL

This step is for Enterprise, Unlimited, and Developer Editions only

- This screen will ask to setup the application access/security. The default selected setting will only allow the Salesforce admin users to access the TicketManager app.
- Usually most TicketManager users will not be Salesforce admins, so to grant access by user profile click on “Install for All Users” or “Install for Specific Profiiles”



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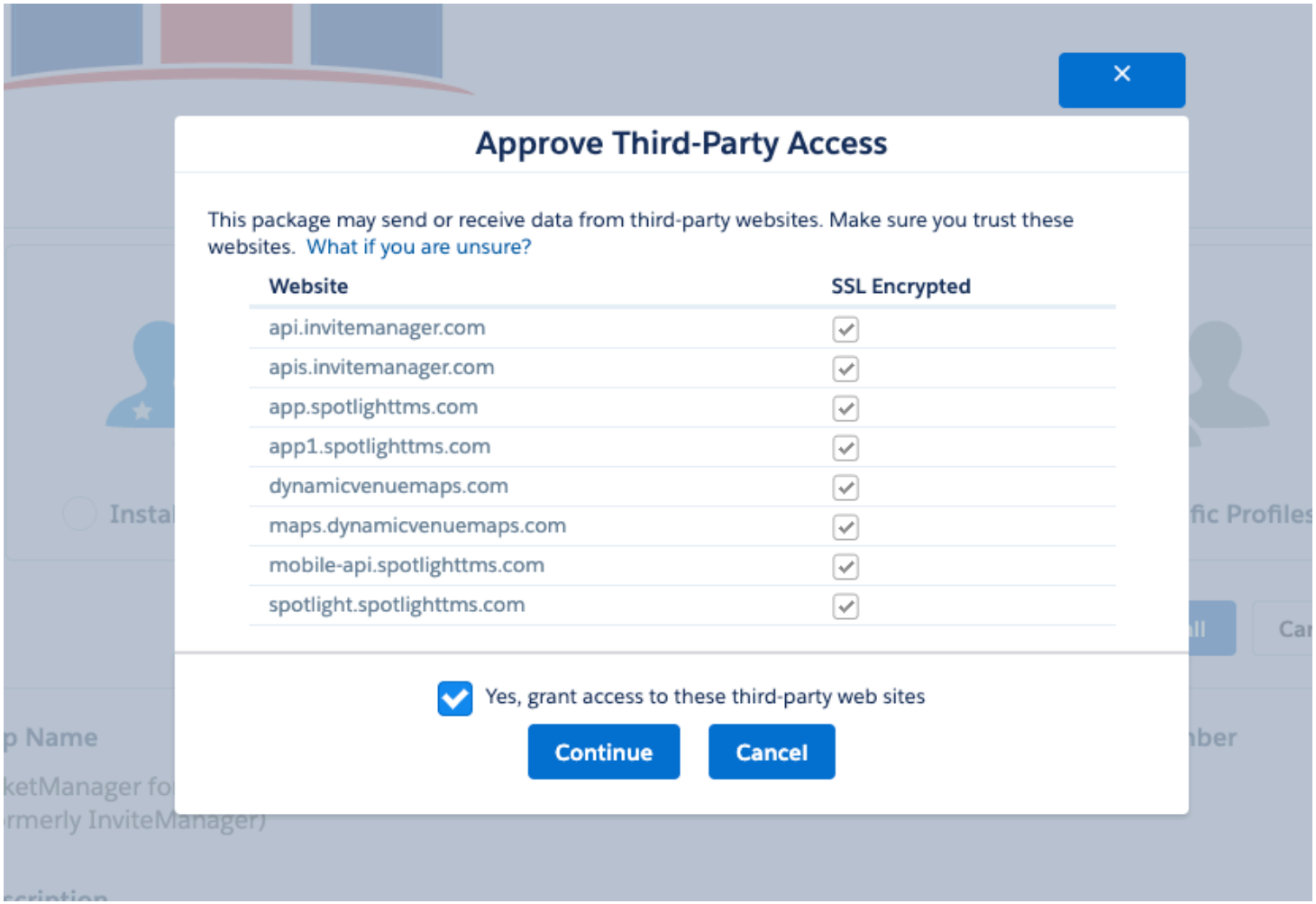
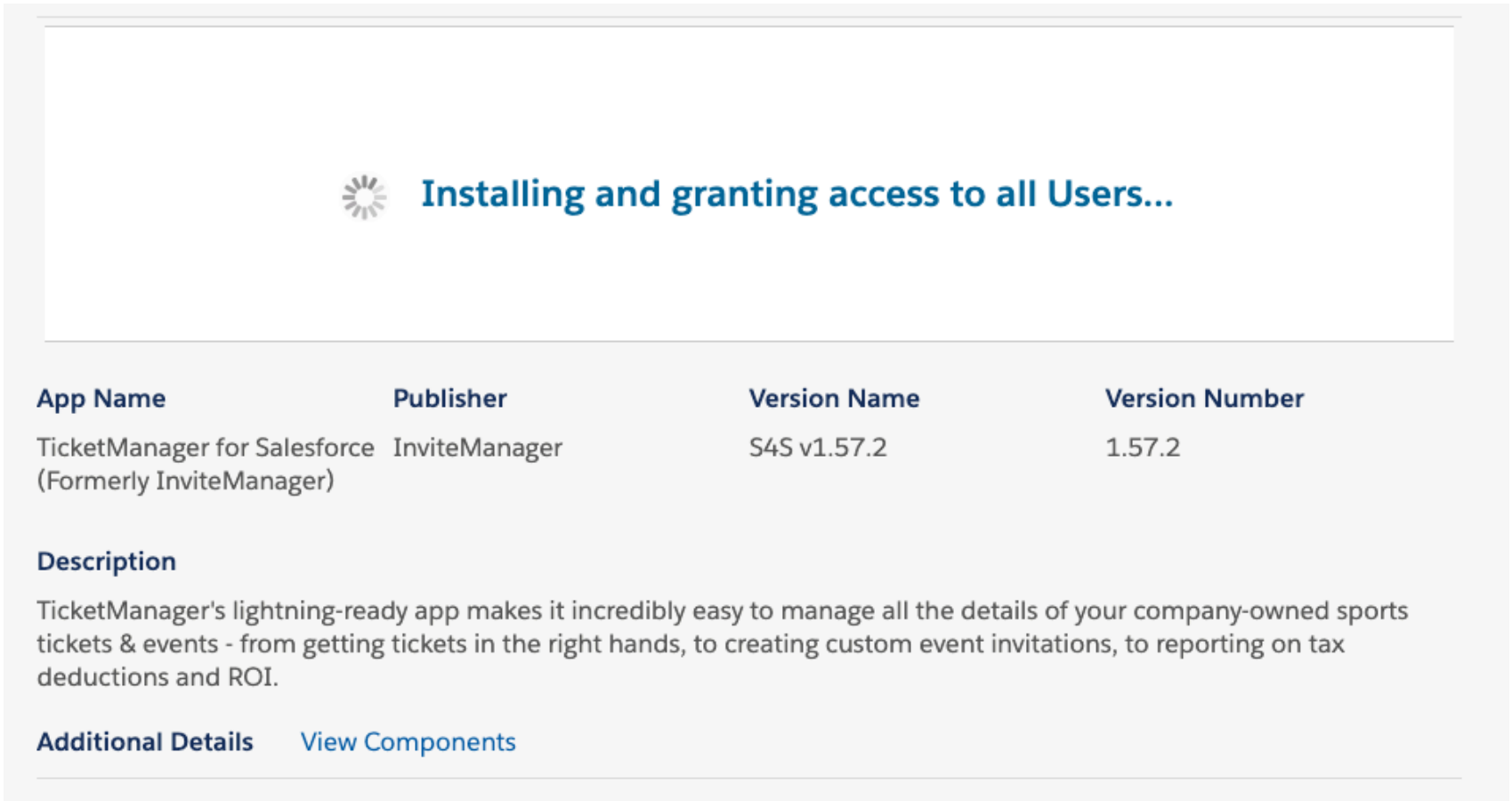
B.3 - APPROVE THIRD PARTY ACCESS and Install

- TicketManager for Salesforce will communicate with your TicketManager account and will display third party access dialogue.
- Select “Yes, grant access to these third-party web sites” and click on “Continue”
  - NOTE: the package needs access to the spotlighttms.com and invitemanager.com servers to sync with TicketManager. It also needs access to maps.dynamicvenuemaps.com to show the interactive venue maps.



B.4 – Installing the application and Wait tlmes

- Once you approve all Third Party Access, the application will install.
- Installation typically takes 5 to 10 minutes. You may be emailed by Salesforce once the application is fully installed.
- Skip the next page if you are have installed for Admins Only or for All Users



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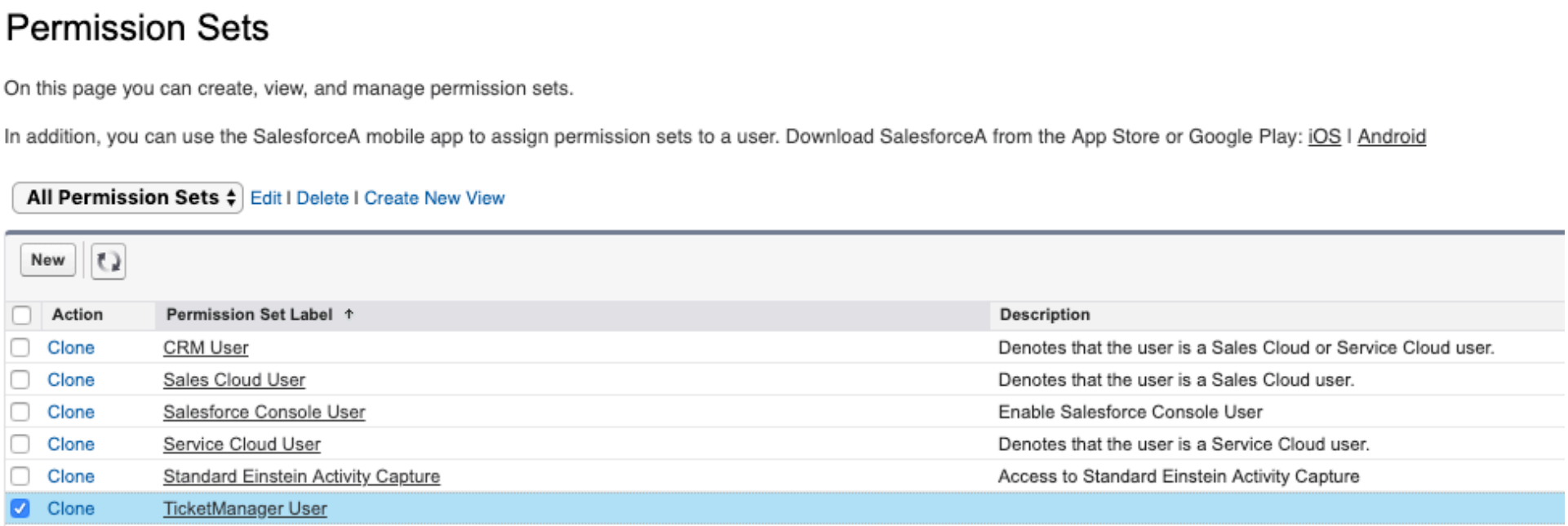
B.5 - CHOOSE SECURITY LEVEL: CUSTOMIZE SECURITY (Installing for Specific Profiles)

This step is for Enterprise, Unlimited, and Developer Editions only

- The TicketManager app comes with a custom access level named “TicketManager User." This access level contains all the required access for a TicketManager user. You can select which one of your custom profiles will have access to the TicketManager app by applying “TicketManager User” to the profile. (Your custom profiles may differ from the ones shown in the image)
- If you are not sure which one of your existing custom profiles should have access to the TicketManager app, select “TicketManager User” for your “Standard Platform User” profile. This will allow all “Standard Platform User” profile users access to the TicketManager app.
- Click “Next” when done.



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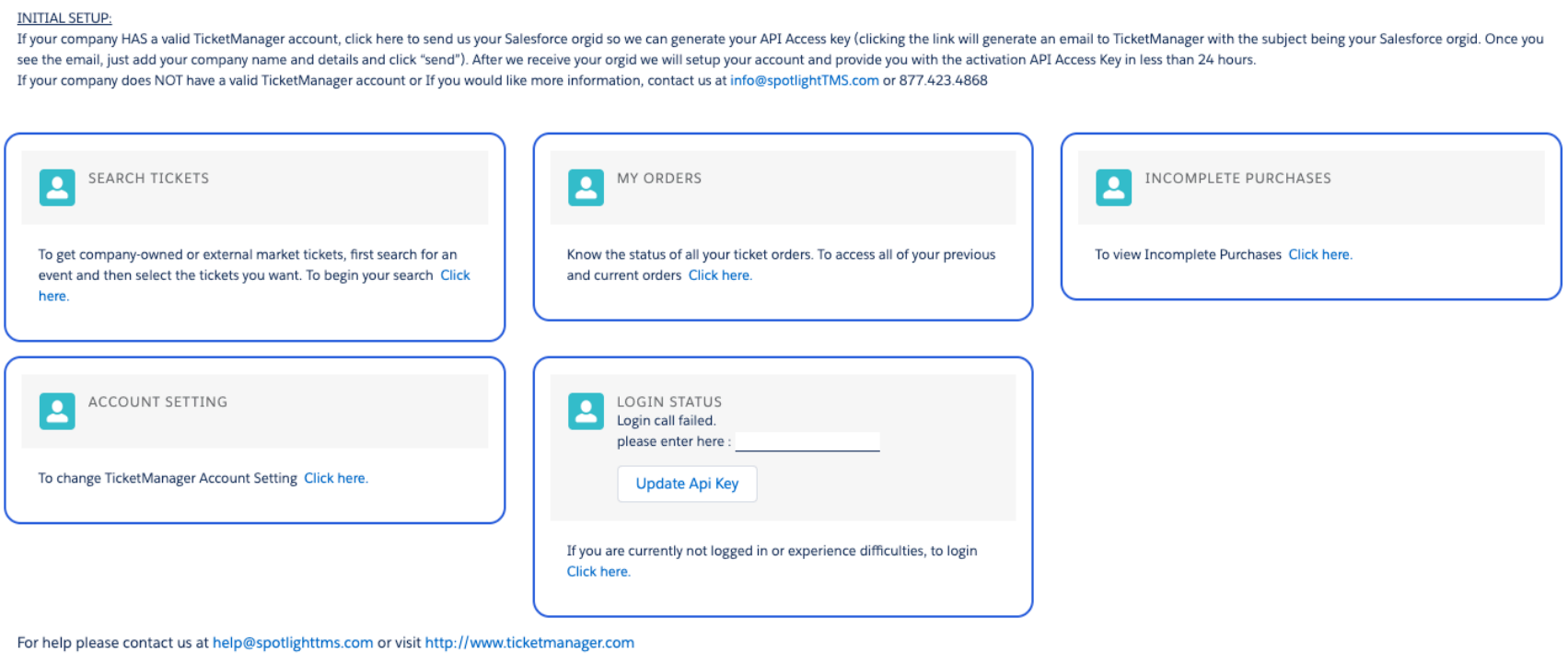
C.1 - APPLICATION ACTIVATION - API KEY

- This step should be performed by a Salesforce admin and is needed only for the initial configuration per environment.
- Before using TicketManager for the first time you need to validate the installation. To do so, from the app navigation menu on the top left corner, select “TicketManager." This will show the three TicketManager tabs. Click on “TicketManager Home Page” tab to open the configuration page.
- If you don’t have your API Access key follow the in-screen steps under “Initial Setup” and we will send it to you. This will ensure the security and integrity of the installation. Please note you can not use the application until you have a valid API key.
- Once you receive the API key, enter it and select “Add." If the key is accepted, the “Initial Setup” section will disappear as you need to enter the API access key only once.
- The application is ready to be used



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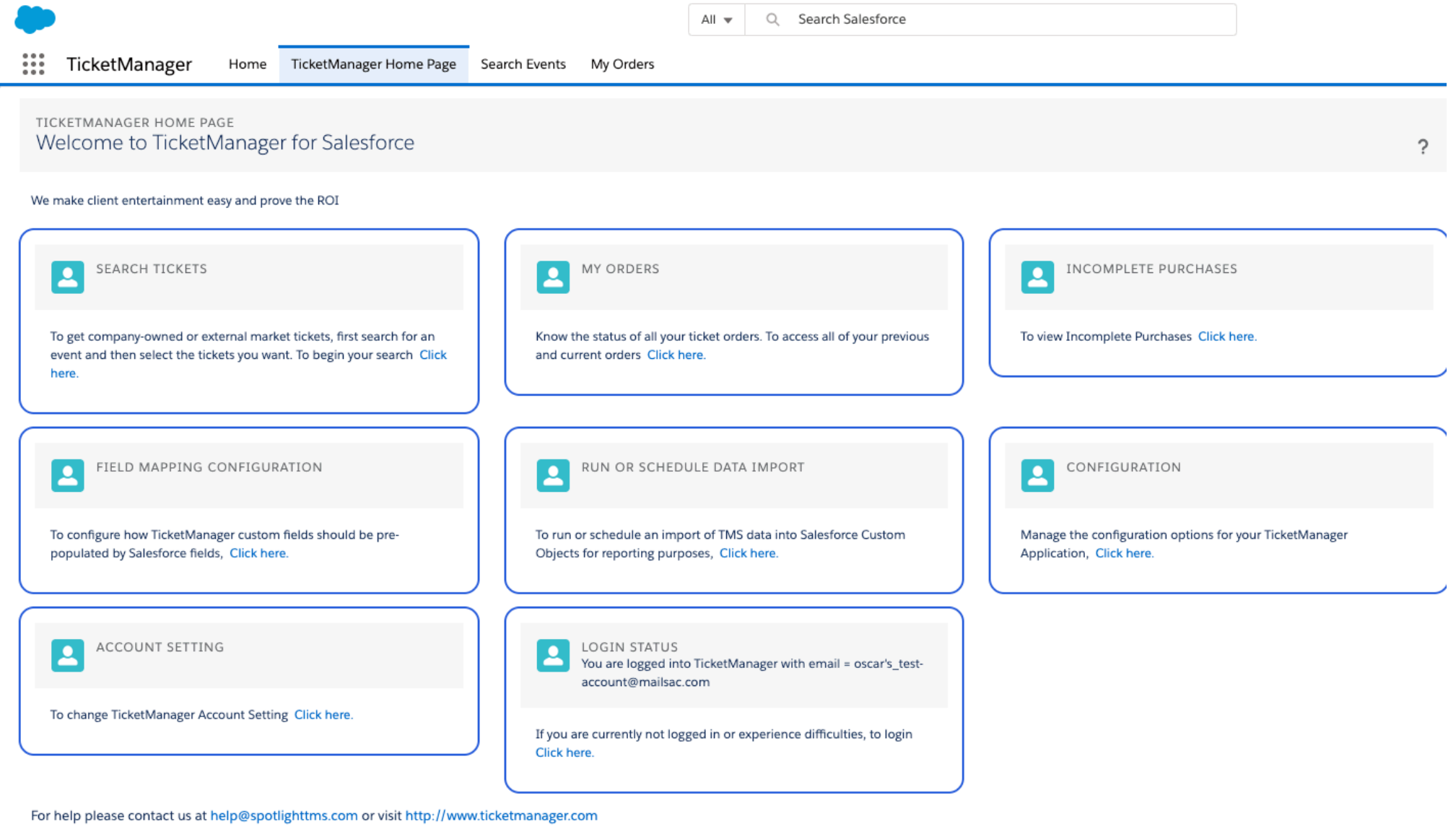
C.2 - APPLICATION ACTIVATION – Authorized Application

- Below is a screenshot of the Authorized application.
  - If you do not have the three boxes in the middle, please ensure you are a CSA in TicketManager.



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D.1 - APPLICATION CONFIGURATION – Classic Salesforce

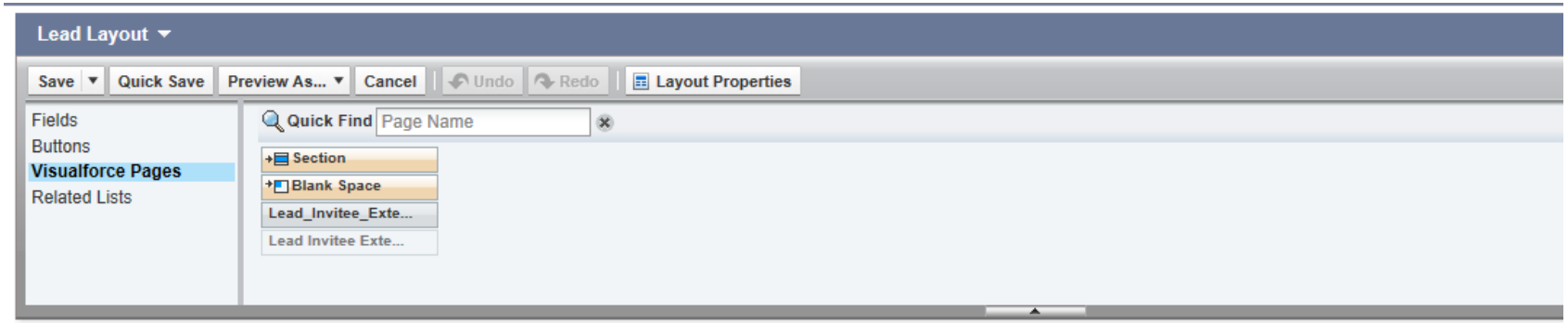
- **Add the "TicketManager Invitation History" widget to show on Contacts, Leads, Users, Opportunity, and Accounts detail pages**
  - This step should be performed by a Salesforce admin and is needed only for the initial configuration.
  - The "Invitation History" widget will allow users to initiate the ticket ordering process directly from the individual contact, lead, users, opportunity and account pages. In addition it will show the invitation history for the respective object.

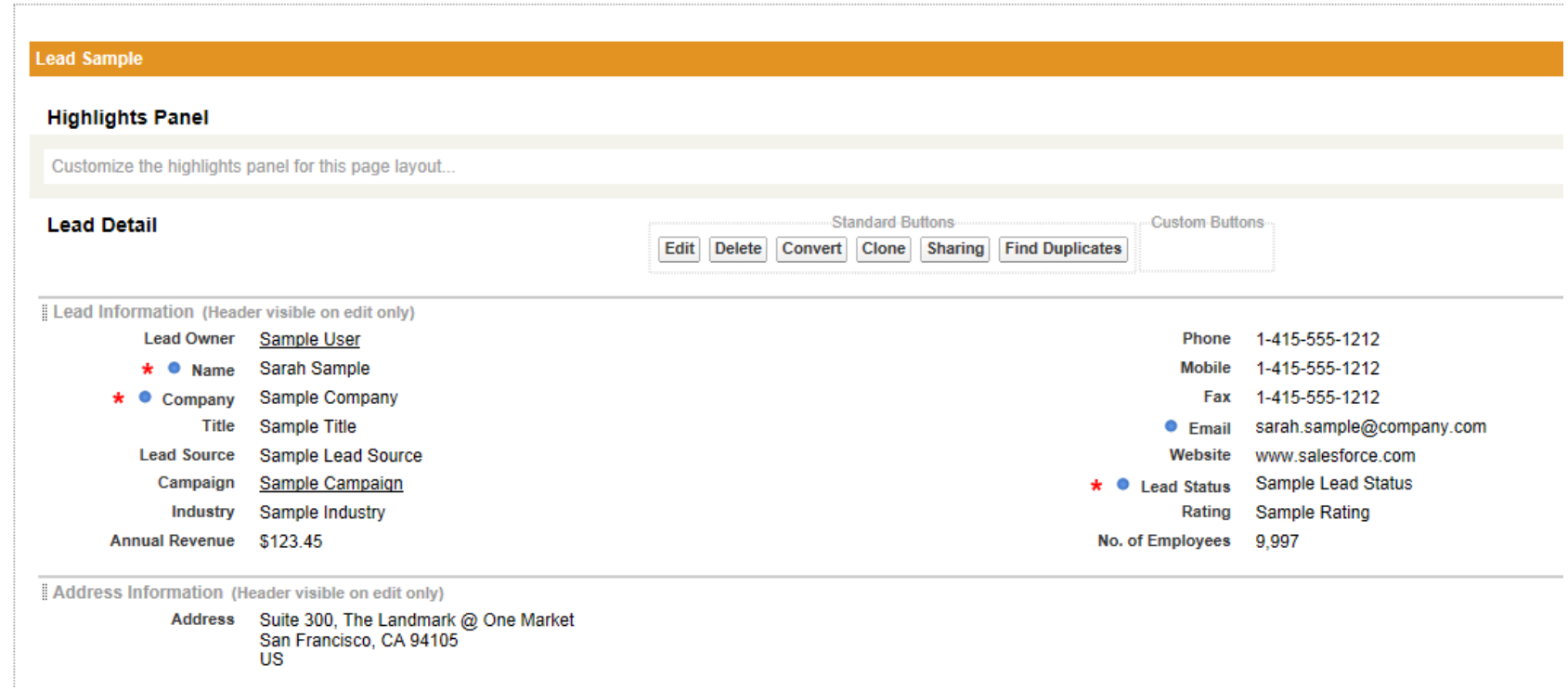
- **Configure Invitation History**
  - NOTE: Example below shows configuration for Accounts. Repeat steps for each standard Object your company uses (Contacts, Users, Accounts and Opportunities)
  - Go to Setup > Customize > **Accounts** > Page Layouts
  - Click the "Edit" link next to the default Lead Layout

For Lightning configuration instructions, skip to page 15.

D.2 - APPLICATION CONFIGURATION (Continued)

Select "Visualforce Pages" from the list on the top of the page
Drag and drop the "Section“ element on to the page layout on the bottom and place it at the location where you would want the lead “Sports & Event Ticket Invitation History” to show on the lead detail page





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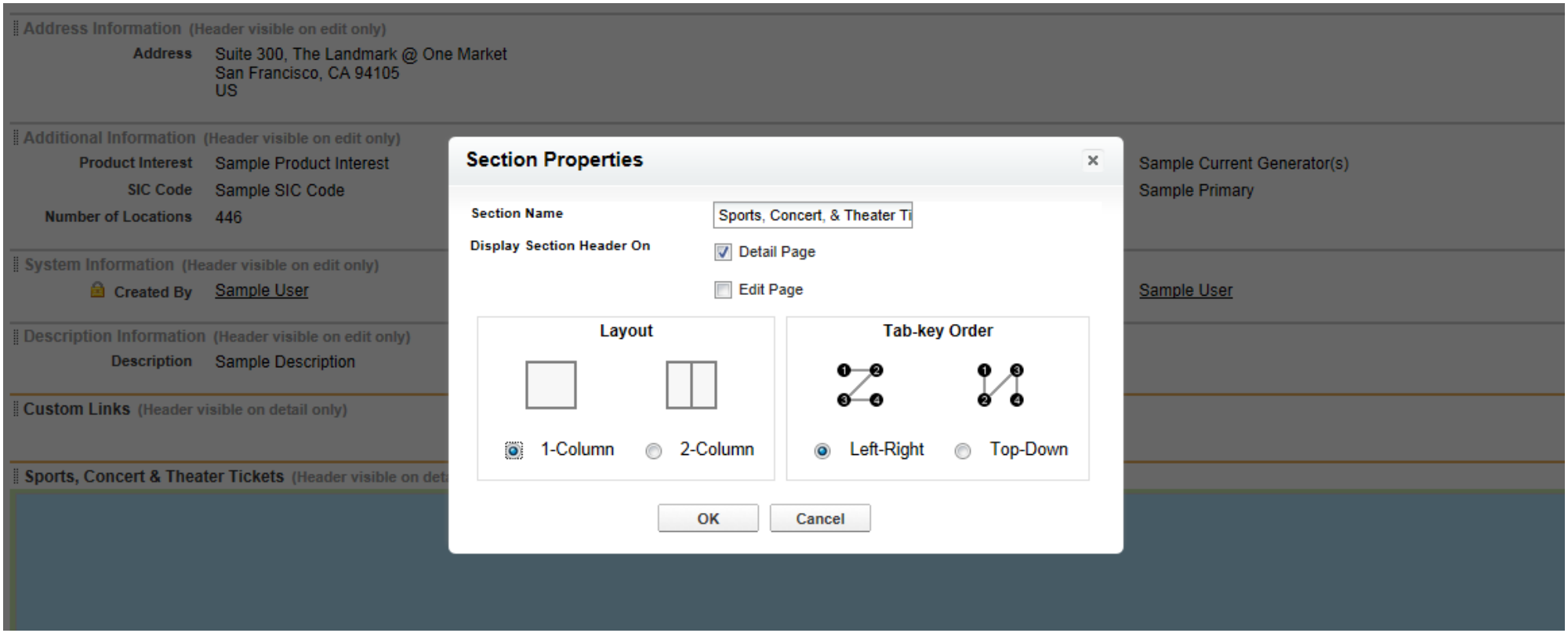
D.3 - APPLICATION CONFIGURATION (Continued)

Once you drag and drop the "Section" element, the following screen will be displayed
Set the "Section Name" to “Sports, Concert, & Theater Tickets”
Select "Display Section Header on" for "Detail Page" only
Set Layout to be "1-Column"
Set "Tab key Order" to be Left-Right; click “OK”



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D.4 - APPLICATION CONFIGURATION (Continued)

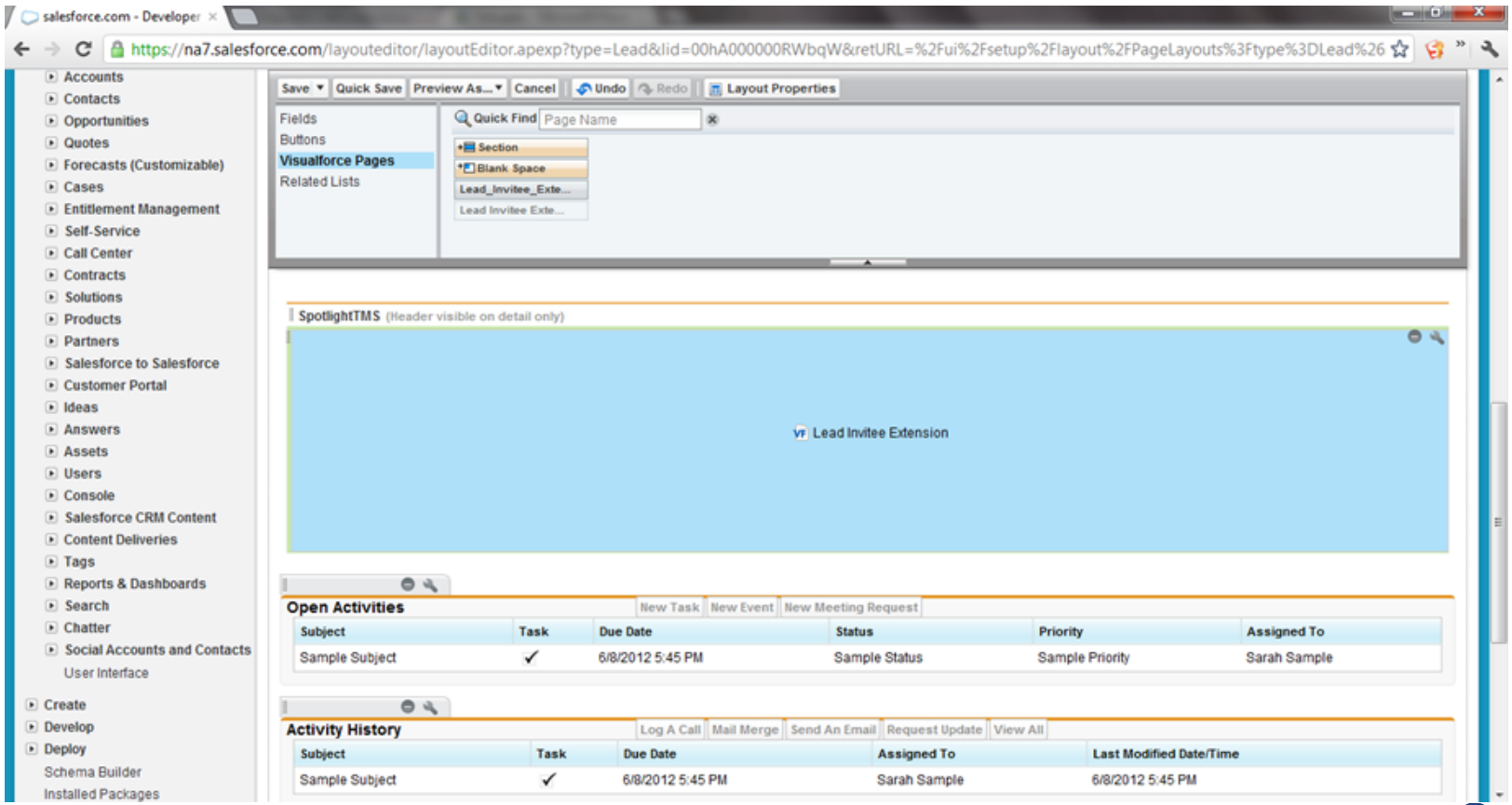
From the “Lead Layout” area, select “Visualforce Pages”, then drag and drop the "Lead_Invitee_Extension" Visualforce page on to the Section element that was added to the page layout on the previous step.

NOTE: You may see 2 similar Extensions, make sure you selec the “Lead_Invitee_Extension” and not the “Lead_Invitee_Extension_Print”

On the top right corner of the extension, click on the wrench icon to open the properties menu

Change “Height (in pixels)” to 360, make sure “Show scrollbars” is checked; click “Ok”

Click "Save" to have the changes to the layout saved for the Lead detail page



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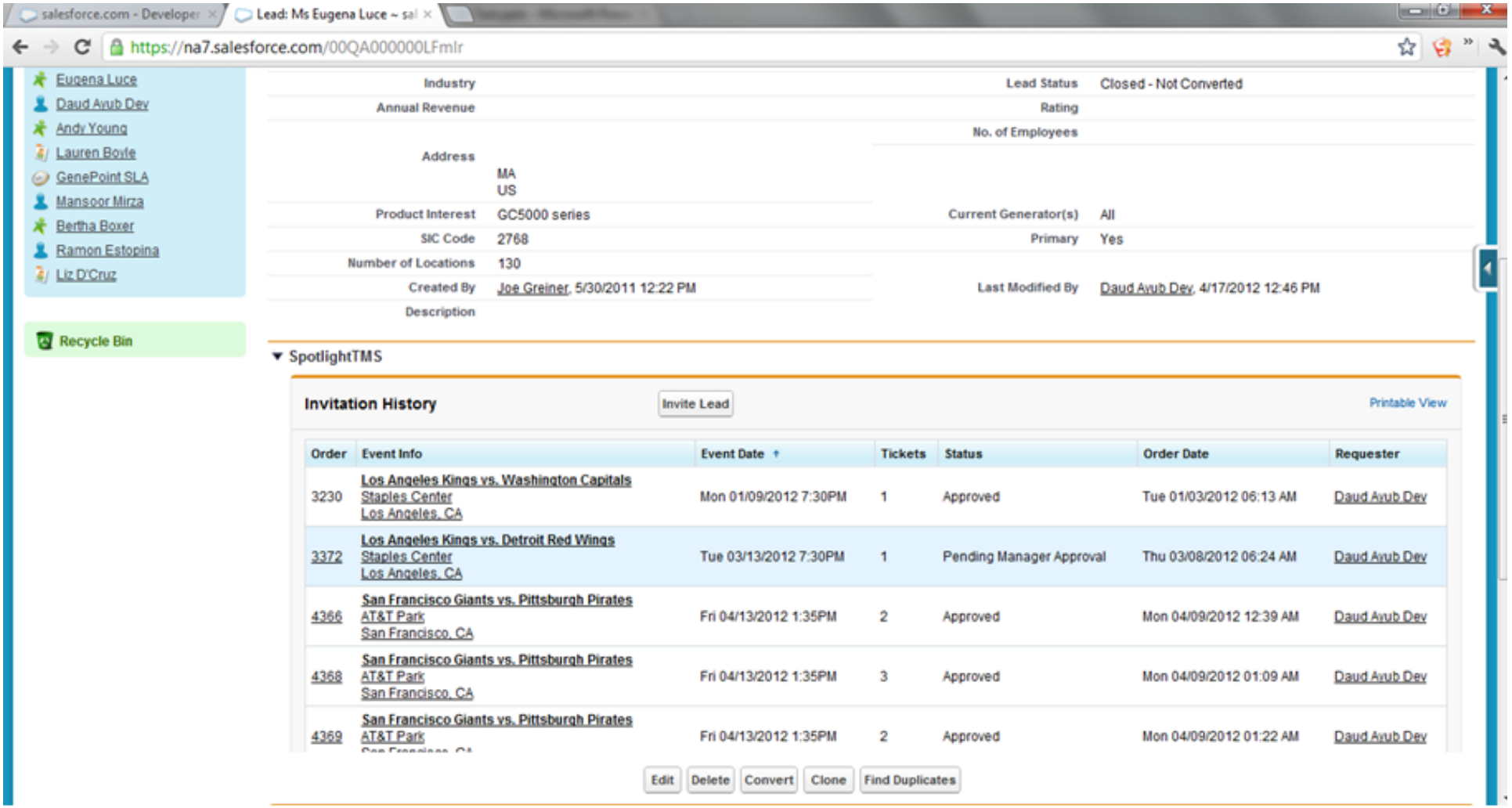
D.5 - APPLICATION CONFIGURATION (Continued)

The Lead Detail page will now show the invitation history for each individual lead.



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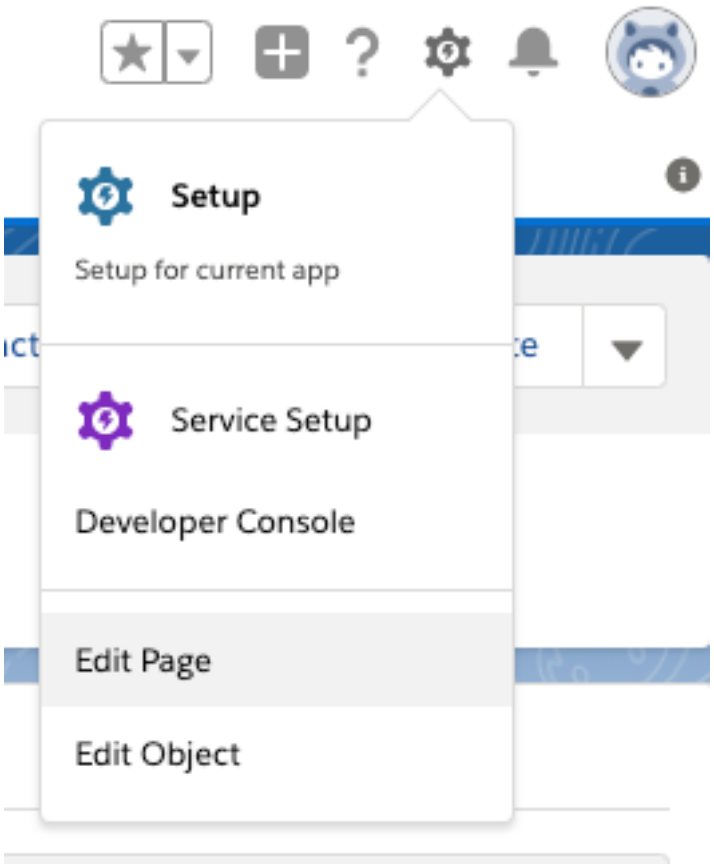
D.6 - APPLICATION CONFIGURATION for Lightning Orgs

- Head over to an Object Record page, in this case we selected “Burlington Textiles Corp of America” in “Accounts”.
- Click on the Lightning Settings Gear on the top right and click on “Edit Page”



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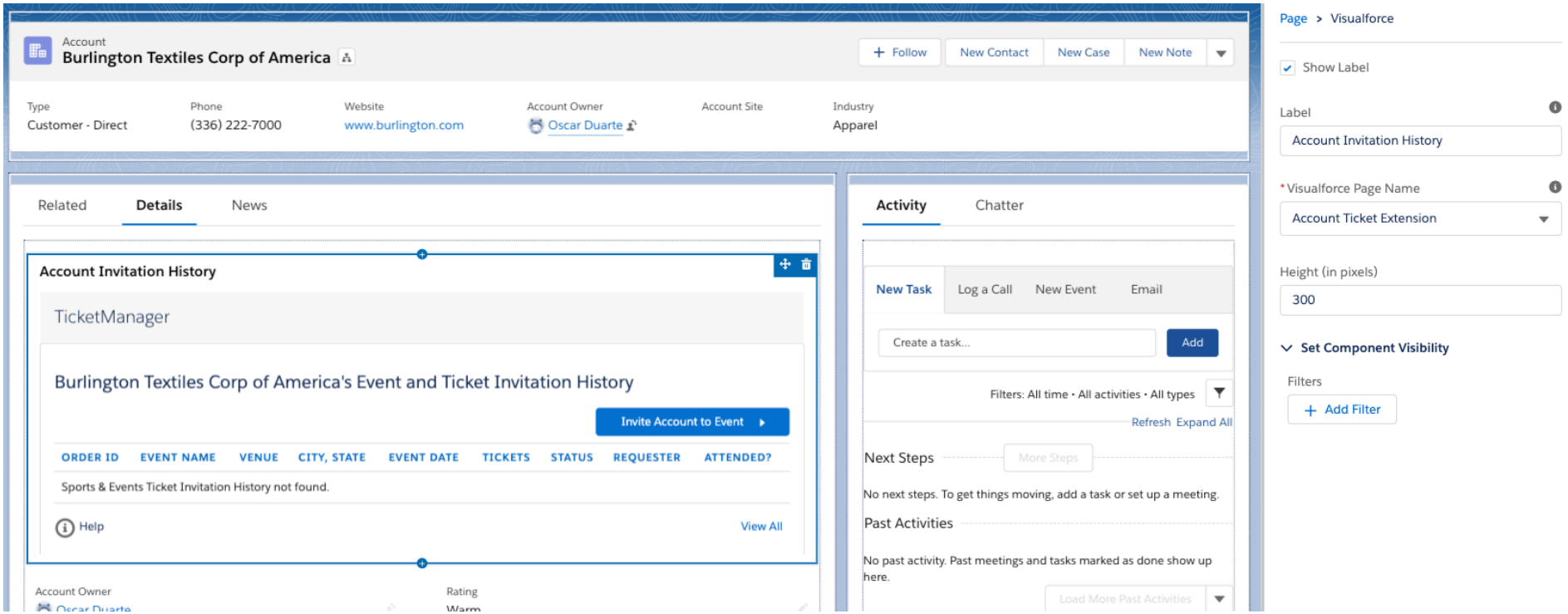
D.7 - APPLICATION CONFIGURATION for Lightning Orgs

- Once in editing mode for the record page, look to the left and locate ”Lightning Components”. Look for “Visualforce”.
- Once found, click and drag “Visualforce” to your desired location.
- On the right-hand side you find the Visualforce page Name. Make sure to select “[Object]* Ticket Extension” can adjust the “Height” of the widget. We recommend 300 pixels but you may expand if you expect a large volume of requests for any given record.
- Once satisfied with your configurations, hit “Save”.



*[Object] can be: Account, Contact, Lead, Opportunity, or User.

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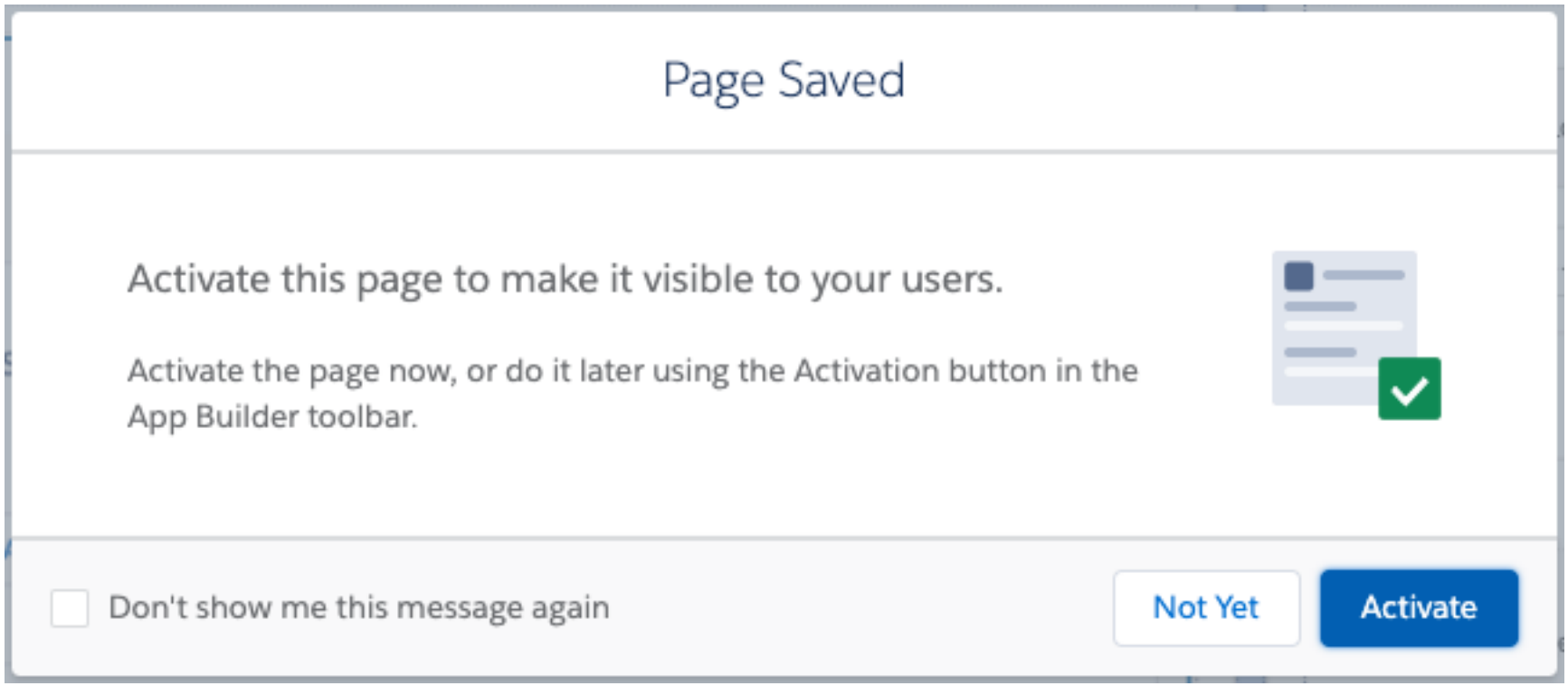
D.8 - APPLICATION CONFIGURATION for Lightning Orgs

- Once you've saved the page layout, you will need to activate the page for users to view. Click Activate.



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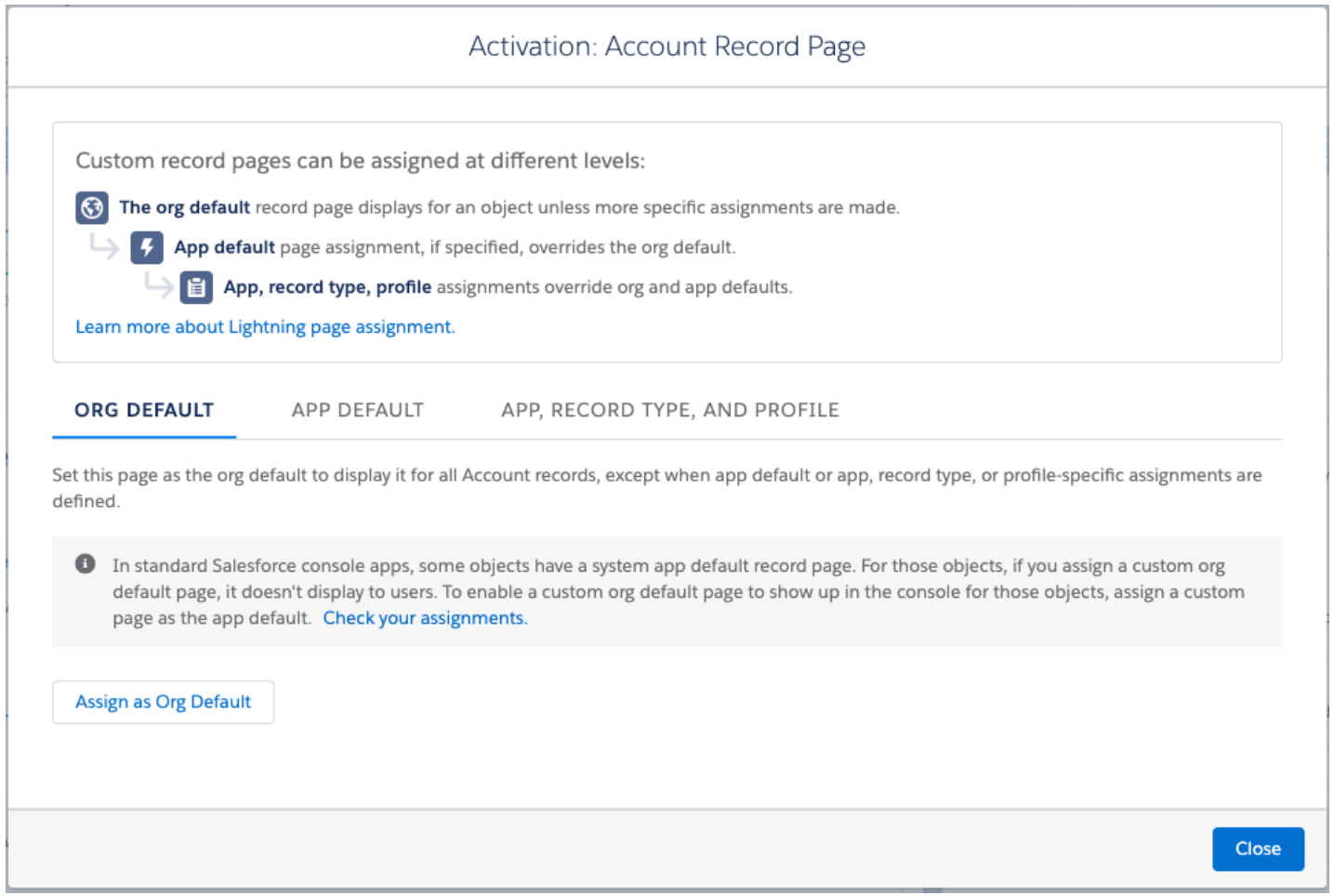
D.8 - APPLICATION CONFIGURATION for Lightning Orgs

- Once you've clicked "Activate". Make the page changes active for: The Organization (Org Default), within the context of the app (App Default) or for very specific cases (App, Record Type, and Profile).

We suggest Org Default but please consult with your organization. TicketManager is supported on mobile.



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E. - USER ACCOUNT SETTINGS

- Depending on your TicketManager product features, your TicketManager users may need to complete their user profile, especially to provide any information your organization deemed mandatory. A TicketManager user will not be able to use the application until they provide all mandatory information.

- **The following steps need to be followed by each user before using TicketManager for the first time.**

- From the “Force.com App” menu on the top right corner (or 9 dots on the top left on lightning), select “TicketManager." This will show the three TicketManager tabs. Click on “TicketManager Home Page” tab then in the “Account Settings” section.

- To fill the TicketManager account with the Salesforce profile information select “Populate with Salesforce profile information." Make the necessary changes and ensure any mandatory information is complete.

- When done, select “Update TicketManager Account settings with data above." Once you get the success message you can begin using the application.

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F. UPGRADING FROM A PREVIOUS VERSION

- Go to the AppExchange Listing for TicketManager, and click the “Get It Now” button
- Follow the prompts for installing the application
- You will be shown the “Package Upgrade Details” describing the new version being installed and the existing installed version.
- Next you will be shown pages for setting the details of the application (Steps B3 through B6)
- At the end of this process, the application will be upgraded.
- You will not need to make any other changes to TicketManager to complete the upgrade.

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