



INSTALLATION AND CONFIGURATION

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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

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



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"

The screenshot shows the 'Confirm Installation Details' dialog box in the Salesforce AppExchange. The dialog is titled 'Confirm Installation Details' and contains the following information:

Review the [customization guide](#) for installation and configuration steps.

Package	TicketManager for Salesforce (S4S v1.57.2 / 1.57.2)	Version	S4S v1.57.2 / 1.57.2
Subscription	Free	Organization	InviteManager
Duration	Does Not Expire	Number of Subscribers	Site-wide
Username	oscard-uat@ticketmanager.com		

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Oscar	* Company	InviteManager
* Last Name	Duarte	* Country	United States
* Job Title	Product Manager	* State/Province	California
* Email	oscard@ticketmanager.com		
Phone			

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

[Cancel](#) [Confirm and Install](#)

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 Profiles”

Install for Admins Only

Install for All Users

Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
TicketManager for Salesforce (Formerly InviteManager)	InviteManager	S4S v1.57.2	1.57.2

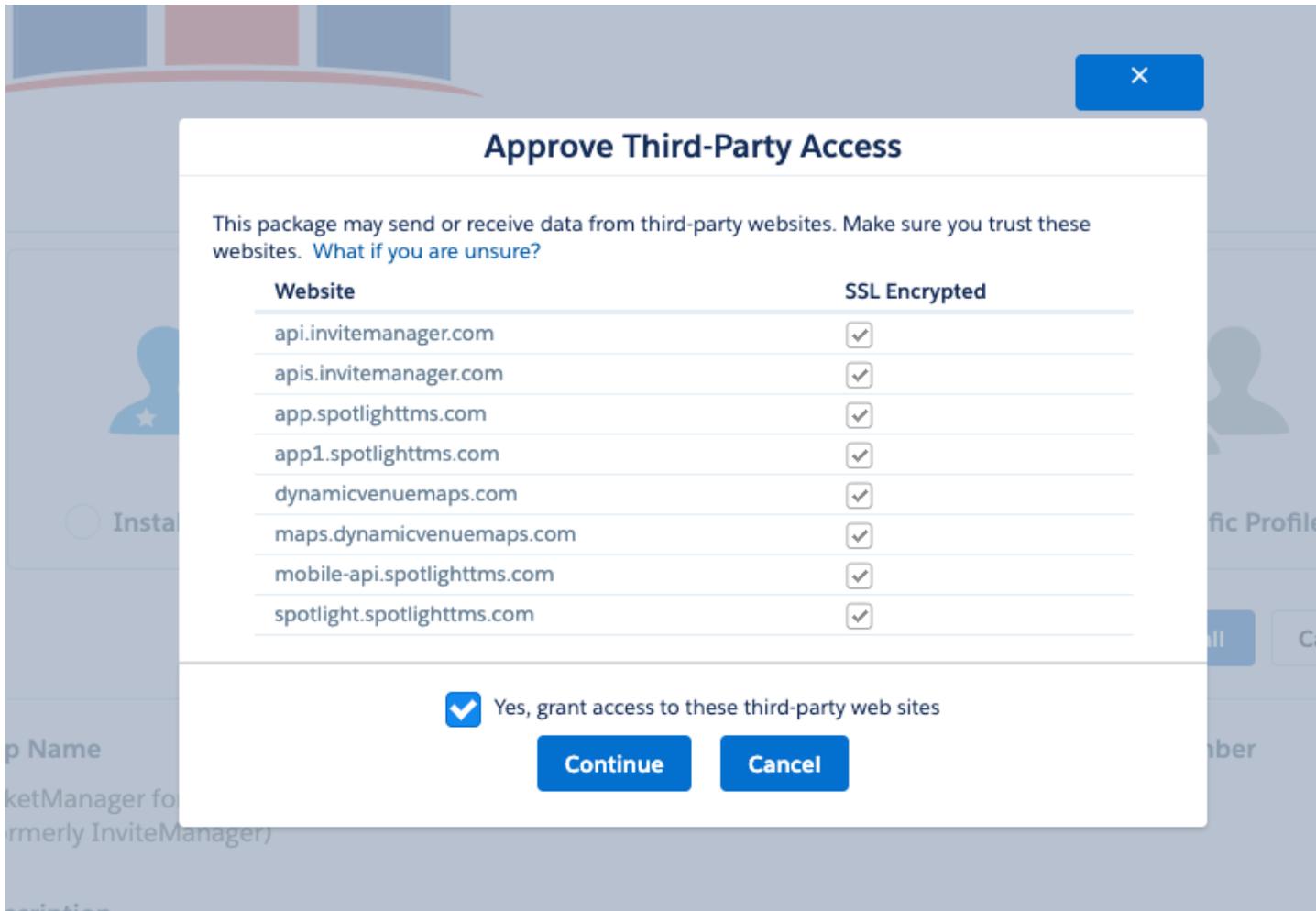
Description

TicketManager's lightning-ready app makes it incredibly easy to manage all the details of your company-owned sports tickets & events - from getting tickets in the right hands, to creating custom event invitations, to reporting on tax deductions and ROI.

Additional Details [View Components](#)

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 times

- 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



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
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Description

TicketManager's lightning-ready app makes it incredibly easy to manage all the details of your company-owned sports tickets & events - from getting tickets in the right hands, to creating custom event invitations, to reporting on tax deductions and ROI.

[Additional Details](#) [View Components](#)

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.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets ▾ [Edit](#) | [Delete](#) | [Create New View](#)

<input type="button" value="New"/>	<input type="button" value="Refresh"/>		
<input type="checkbox"/>	Action	Permission Set Label ↑	Description
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.
<input type="checkbox"/>	Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.
<input type="checkbox"/>	Clone	Salesforce Console User	Enable Salesforce Console User
<input type="checkbox"/>	Clone	Service Cloud User	Denotes that the user is a Service Cloud user.
<input type="checkbox"/>	Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture
<input checked="" type="checkbox"/>	Clone	TicketManager User	

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

INITIAL SETUP:

If your company HAS a valid TicketManager account, click here to send us your Salesforce orgid so we can generate your API Access key (clicking the link will generate an email to TicketManager with the subject being your Salesforce orgid. Once you see the email, just add your company name and details and click "send"). After we receive your orgid we will setup your account and provide you with the activation API Access Key in less than 24 hours.

If your company does NOT have a valid TicketManager account or If you would like more information, contact us at info@spotlightTMS.com or 877.423.4868

 **SEARCH TICKETS**

To get company-owned or external market tickets, first search for an event and then select the tickets you want. To begin your search [Click here.](#)

 **MY ORDERS**

Know the status of all your ticket orders. To access all of your previous and current orders [Click here.](#)

 **INCOMPLETE PURCHASES** **ACCOUNT SETTING** **LOGIN STATUS**
Login call failed.
please enter here :

For help please contact us at help@spotlighttms.com or visit <http://www.ticketmanager.com>

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.

TICKETMANAGER HOME PAGE

Welcome to TicketManager for Salesforce ?

We make client entertainment easy and prove the ROI

- SEARCH TICKETS**
To get company-owned or external market tickets, first search for an event and then select the tickets you want. To begin your search [Click here](#).
- MY ORDERS**
Know the status of all your ticket orders. To access all of your previous and current orders [Click here](#).
- INCOMPLETE PURCHASES**
To view Incomplete Purchases [Click here](#).
- FIELD MAPPING CONFIGURATION**
To configure how TicketManager custom fields should be pre-populated by Salesforce fields, [Click here](#).
- RUN OR SCHEDULE DATA IMPORT**
To run or schedule an import of TMS data into Salesforce Custom Objects for reporting purposes, [Click here](#).
- CONFIGURATION**
Manage the configuration options for your TicketManager Application, [Click here](#).
- ACCOUNT SETTING**
To change TicketManager Account Setting [Click here](#).
- LOGIN STATUS**
You are logged into TicketManager with email = oscar's_test-account@mailsac.com
If you are currently not logged in or experience difficulties, to login [Click here](#).

For help please contact us at help@spotlighttms.com or visit <http://www.ticketmanager.com>

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

The screenshot shows the Salesforce Lead Layout editor. At the top, there is a toolbar with buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a search bar labeled "Quick Find" with the text "Page Name" and a search icon. On the left side, there is a sidebar with categories: Fields, Buttons, Visualforce Pages (highlighted), and Related Lists. In the main workspace, a list of elements is displayed, including "Section", "Blank Space", "Lead_Invitee_Ext...", and "Lead Invitee Ext...".

The screenshot shows the Salesforce Lead Sample detail page. At the top, there is a header "Lead Sample" in an orange bar. Below it is a "Highlights Panel" with the text "Customize the highlights panel for this page layout...". Underneath is a "Lead Detail" section with a "Standard Buttons" group containing "Edit", "Delete", "Convert", "Clone", "Sharing", and "Find Duplicates", and a "Custom Buttons" group. The main content area is divided into two sections: "Lead Information (Header visible on edit only)" and "Address Information (Header visible on edit only)".

Lead Information (Header visible on edit only)	
Lead Owner	Sample User
* ● Name	Sarah Sample
* ● Company	Sample Company
Title	Sample Title
Lead Source	Sample Lead Source
Campaign	Sample Campaign
Industry	Sample Industry
Annual Revenue	\$123.45
Phone	1-415-555-1212
Mobile	1-415-555-1212
Fax	1-415-555-1212
● Email	sarah.sample@company.com
Website	www.salesforce.com
* ● Lead Status	Sample Lead Status
Rating	Sample Rating
No. of Employees	9,997

Address Information (Header visible on edit only)	
Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

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"

The screenshot displays the TicketManager application configuration interface. A modal dialog box titled "Section Properties" is open in the center. The dialog has a close button (X) in the top right corner. It contains the following fields and options:

- Section Name:** A text input field containing "Sports, Concert, & Theater Ti".
- Display Section Header On:** Two checkboxes: "Detail Page" (checked) and "Edit Page" (unchecked).
- Layout:** Two radio button options: "1-Column" (selected) and "2-Column".
- Tab-key Order:** Two radio button options: "Left-Right" (selected) and "Top-Down".

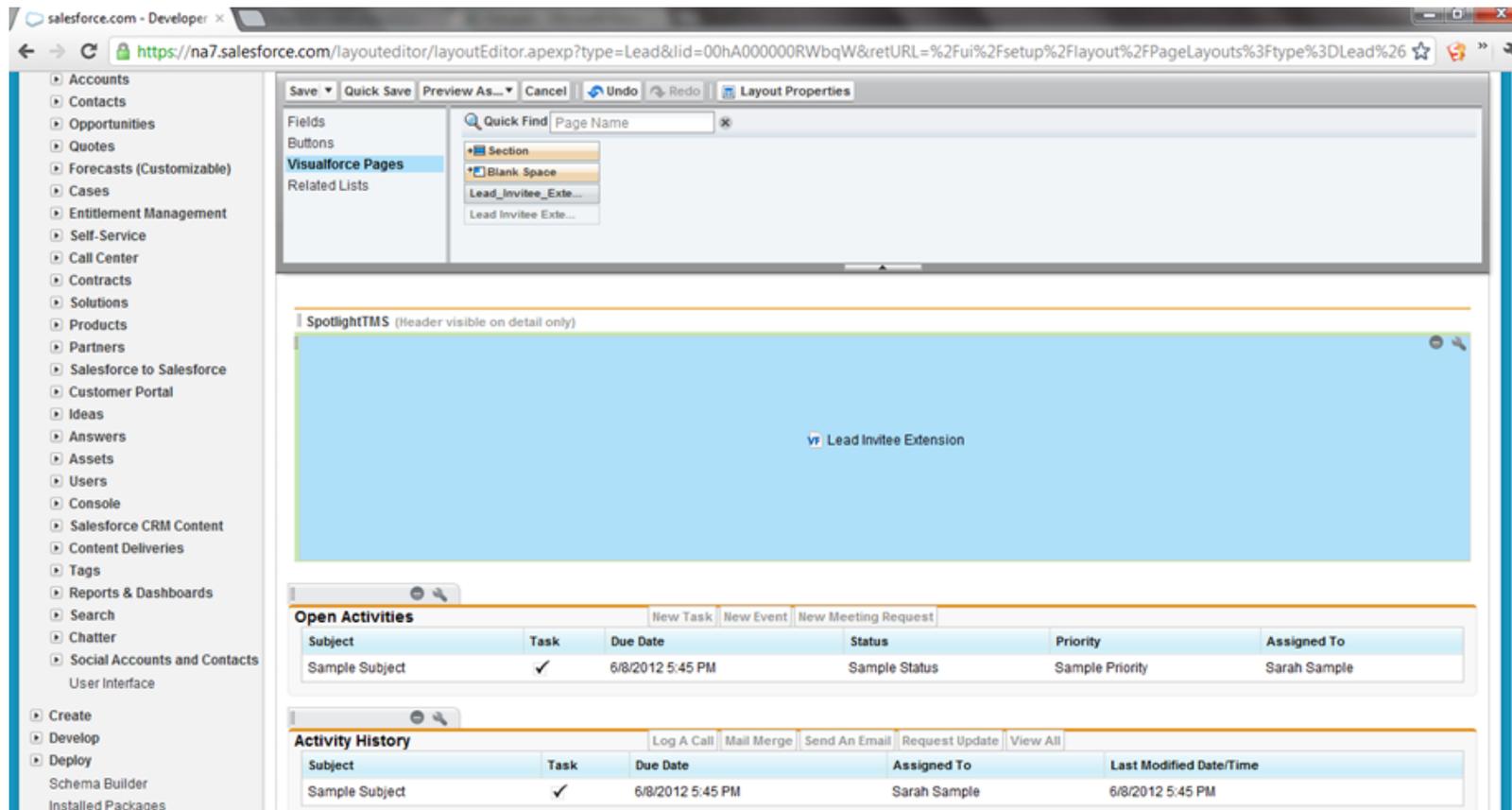
At the bottom of the dialog are "OK" and "Cancel" buttons. The background shows a blurred view of the application configuration page with sections like "Address Information", "Additional Information", "System Information", "Description Information", "Custom Links", and "Sports, Concert & Theater Tickets".

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 select 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



The screenshot shows the Salesforce Developer console interface. The browser address bar displays the URL: <https://na7.salesforce.com/layouteditor/layoutEditor.apexp?type=Lead&lid=00hA000000RWbqW&retURL=%2Fui%2Fsetup%2Flayout%2FPageLayouts%3Ftype%3DLead%26>. The left sidebar contains a navigation menu with categories like Accounts, Contacts, Opportunities, and Visualforce Pages. The main editor area shows a 'SpotlightTMS' section with a large blue box labeled 'Lead Invitee Extension'. Below this, there are two tables: 'Open Activities' and 'Activity History'. The 'Open Activities' table has columns for Subject, Task, Due Date, Status, Priority, and Assigned To. The 'Activity History' table has columns for Subject, Task, Due Date, Assigned To, and Last Modified Date/Time.

Subject	Task	Due Date	Status	Priority	Assigned To
Sample Subject	✓	6/8/2012 5:45 PM	Sample Status	Sample Priority	Sarah Sample

Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	✓	6/8/2012 5:45 PM	Sarah Sample	6/8/2012 5:45 PM

D.5 - APPLICATION CONFIGURATION (Continued)

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

The screenshot shows a Salesforce Lead Detail page for 'Ms Eugena Luce'. The page includes a navigation sidebar with user avatars, a 'Recycle Bin' button, and a main content area. The main content area displays lead details and an 'Invitation History' table.

Lead Details:

- Industry: [Blank]
- Annual Revenue: [Blank]
- Address: MA, US
- Product Interest: GC5000 series
- SIC Code: 2768
- Number of Locations: 130
- Created By: Joe Greiner, 5/30/2011 12:22 PM
- Description: [Blank]
- Lead Status: Closed - Not Converted
- Rating: [Blank]
- No. of Employees: [Blank]
- Current Generator(s): All
- Primary: Yes
- Last Modified By: Daud Avub Dev, 4/17/2012 12:46 PM

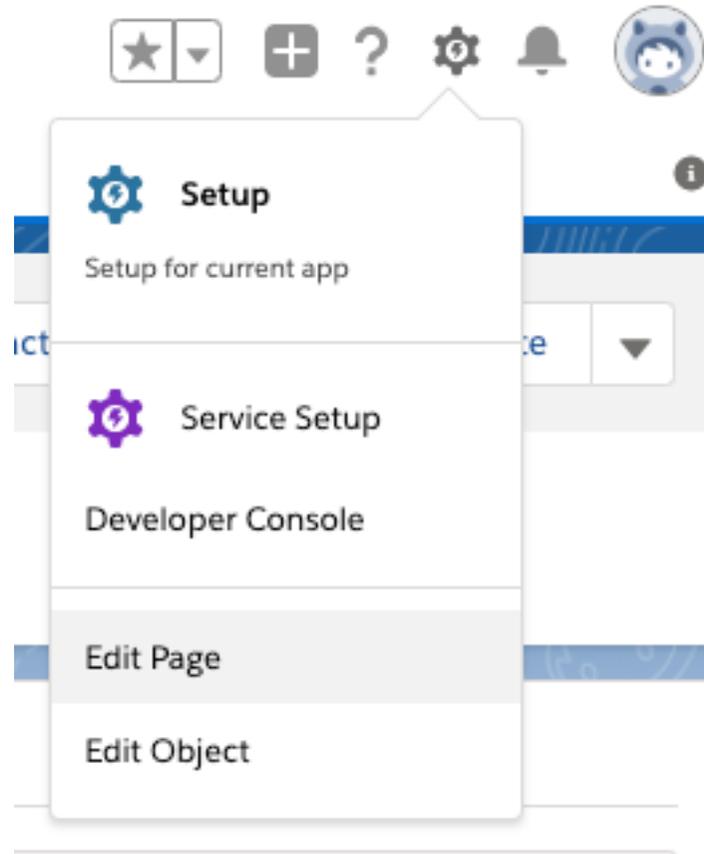
Invitation History Table:

Order	Event Info	Event Date +	Tickets	Status	Order Date	Requester
3230	Los Angeles Kings vs. Washington Capitals Staples Center Los Angeles, CA	Mon 01/09/2012 7:30PM	1	Approved	Tue 01/03/2012 06:13 AM	Daud Avub Dev
3372	Los Angeles Kings vs. Detroit Red Wings Staples Center Los Angeles, CA	Tue 03/13/2012 7:30PM	1	Pending Manager Approval	Thu 03/08/2012 06:24 AM	Daud Avub Dev
4366	San Francisco Giants vs. Pittsburgh Pirates AT&T Park San Francisco, CA	Fri 04/13/2012 1:35PM	2	Approved	Mon 04/09/2012 12:39 AM	Daud Avub Dev
4368	San Francisco Giants vs. Pittsburgh Pirates AT&T Park San Francisco, CA	Fri 04/13/2012 1:35PM	3	Approved	Mon 04/09/2012 01:09 AM	Daud Avub Dev
4369	San Francisco Giants vs. Pittsburgh Pirates AT&T Park San Francisco, CA	Fri 04/13/2012 1:35PM	2	Approved	Mon 04/09/2012 01:22 AM	Daud Avub Dev

Buttons: Edit, Delete, Convert, Clone, Find Duplicates

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”



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".

The screenshot displays the Salesforce Lightning interface for an account record. The account is "Burlington Textiles Corp of America". The interface is split into two main sections: "Details" and "Activity".

Account Details:

- Type: Customer - Direct
- Phone: (336) 222-7000
- Website: www.burlington.com
- Account Owner: Oscar Duarte
- Account Site: [Blank]
- Industry: Apparel

Visualforce Component Configuration (Right Panel):

- Page: Visualforce
- Show Label:
- Label: Account Invitation History
- Visualforce Page Name: Account Ticket Extension
- Height (in pixels): 300
- Set Component Visibility:
- Filters: + Add Filter

Activity Section:

- Activity: New Task, Log a Call, New Event, Email
- Create a task... [Add]
- Filters: All time · All activities · All types
- Next Steps: More Steps
- Past Activities: Load More Past Activities

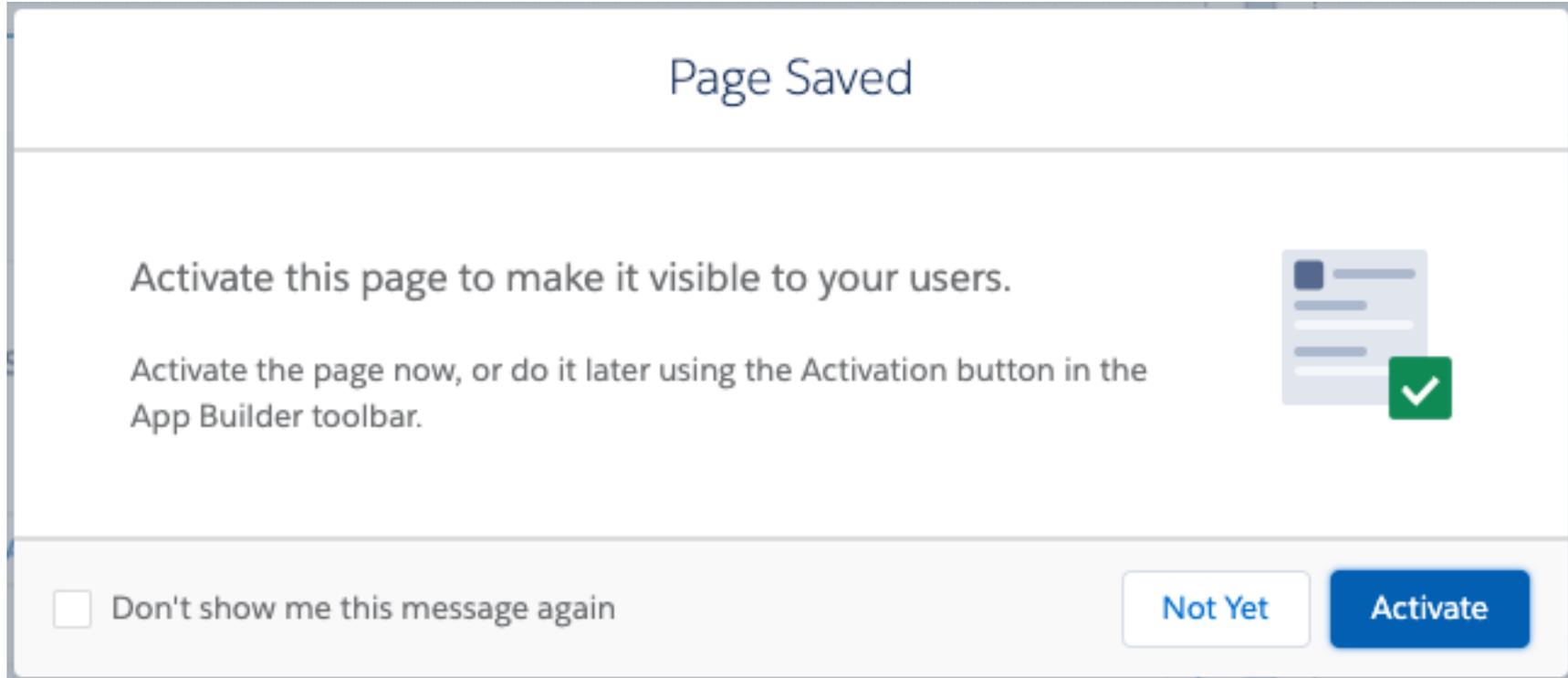
Account Invitation History Table:

ORDER ID	EVENT NAME	VENUE	CITY, STATE	EVENT DATE	TICKETS	STATUS	REQUESTER	ATTENDED?
Sports & Events Ticket Invitation History not found.								

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

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.



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.

Activation: Account Record Page

Custom record pages can be assigned at different levels:

- 🌐 **The org default** record page displays for an object unless more specific assignments are made.
- ⚡ **App default** page assignment, if specified, overrides the org default.
- 📄 **App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT APP DEFAULT APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Account records, except when app default or app, record type, or profile-specific assignments are defined.

i In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. [Check your assignments.](#)

[Assign as Org Default](#)

[Close](#)

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.

Edit Account Settings

User Name *
oscarstestaccount@mailsac.com.developer

Email *
oscar's_test-account@mailsac.com

First Name *
Oscar's_

Last Name *
Test-Account

Department *
Toronto

Region *
Tom

Address Line 1 *
12

Address Line 2
123

City *
123

Zip/Postal Code *
123

Country
United States of America

Cell

Work Phone *
123

State/Province *
Alaska

Fax

Approving Manager
Oscar Duarte

Approving Manager Email
Oscard@ticketmanager.com

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.