



AMSTAT for Salesforce® Version 3.1 – Upgrade Install

INSTALLATION GUIDE FOR SALESFORCE® LIGHTNING VERSION – UPGRADING
FROM AMSTAT FOR SALESFORCE® VERSION 2

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Who Is This Guide For?

This manual was created for Salesforce® administrators and those familiar with installing Salesforce® App Exchange applications, activating My Domain, creating Lightning pages and Classic page layouts, and configuring tabs. If you prefer, AMSTAT is happy to perform the installation while you observe the changes being made to your system.

This guide will specifically address the scenario of upgrading your AMSTAT for Salesforce® application from Version 2 to Version 3 in a Salesforce® Lightning environment. Other guides are available for the following scenarios:

- New Installation of AMSTAT for Salesforce Version 3 in a Salesforce® Lightning environment.
- New installation of AMSTAT for Salesforce Version 3 in a Salesforce® Classic environment
- Upgrading from AMSTAT for Salesforce Version 2 in a Salesforce® Classic environment.

Please refer to the appropriate guide for the situation that suits your specific scenario.

Need Help?

AMSTAT prides itself on being a full-service organization. If you encounter any issues with installing or using AMSTAT for Salesforce®, please do not hesitate to contact us via phone (US) 530-6400 x102 or service@amstatcorp.com.

Before You Start

There are certain prerequisites in order to install AMSTAT for Salesforce®.

- You must be using Salesforce Professional or above. Salesforce Enterprise is recommended. Salesforce Essentials is not supported.
- Salesforce Professional does not allow the creation of the AMSTAT Aircraft object. You will need to create your own custom object in this case.
- An AMSTAT Premier subscription is required in order to search and integrate account, contact, and lead information. Each Salesforce® user must have an AMSTAT Premier account.
 - Note that AMSTAT Connect Plus is not currently supported for Salesforce® integration.
- Salesforce® administrative privileges in order install the application and configure the settings.
- Since you are using Lightning, you must have My Domain activated. Visit this link to see the required steps:
https://help.Salesforce.com/articleView?id=domain_name_overview.htm&type=5
- Since you are using Lightning, you have already created Account, Contact, and Lead pages.

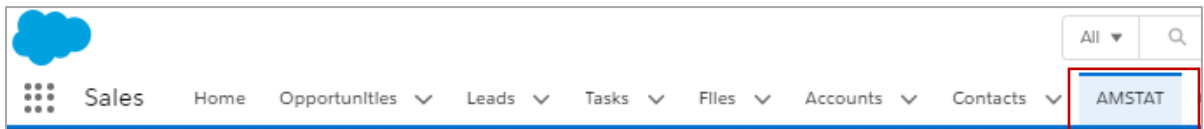
Important Notes on Production and Sandbox installations

1. If you install AMSTAT for Salesforce® in your **Production** environment, then the AMSTAT data used in the app is the same data that you see in your AMSTAT Premier subscription (i.e. they are both updated on the same frequency). In addition, your AMSTAT Saved Searches will appear in your instance of AMSTAT for Salesforce®.
2. If you install AMSTAT for Salesforce® in your **Sandbox** environment, then the AMSTAT data used in the app is from our User Acceptance Testing (UAT) environment. The data in this environment is for testing purposes and may be significantly out of date. Furthermore, your AMSTAT Saved Searches will not appear in the app. If you wish to test the Saved Searches in your Sandbox, please let us know and we will set up samples for you in the UAT environment.

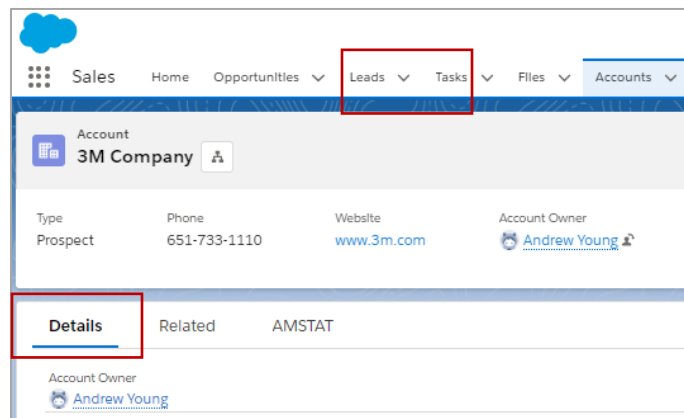
Once installed, what should I see?

Salesforce® allows you to install the elements that make up the AMSTAT for Salesforce® App in various locations. By following these instructions, the below will be the resulting view for users and is the recommended AMSTAT for Salesforce® setup:

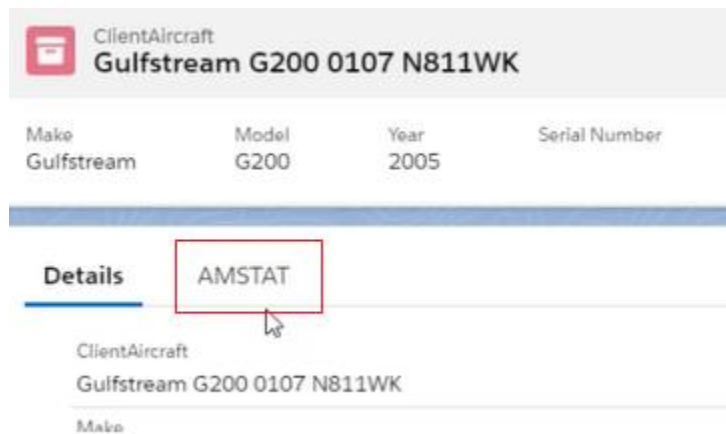
- The Salesforce® object menu (tabs at the top of the page) will include AMSTAT;



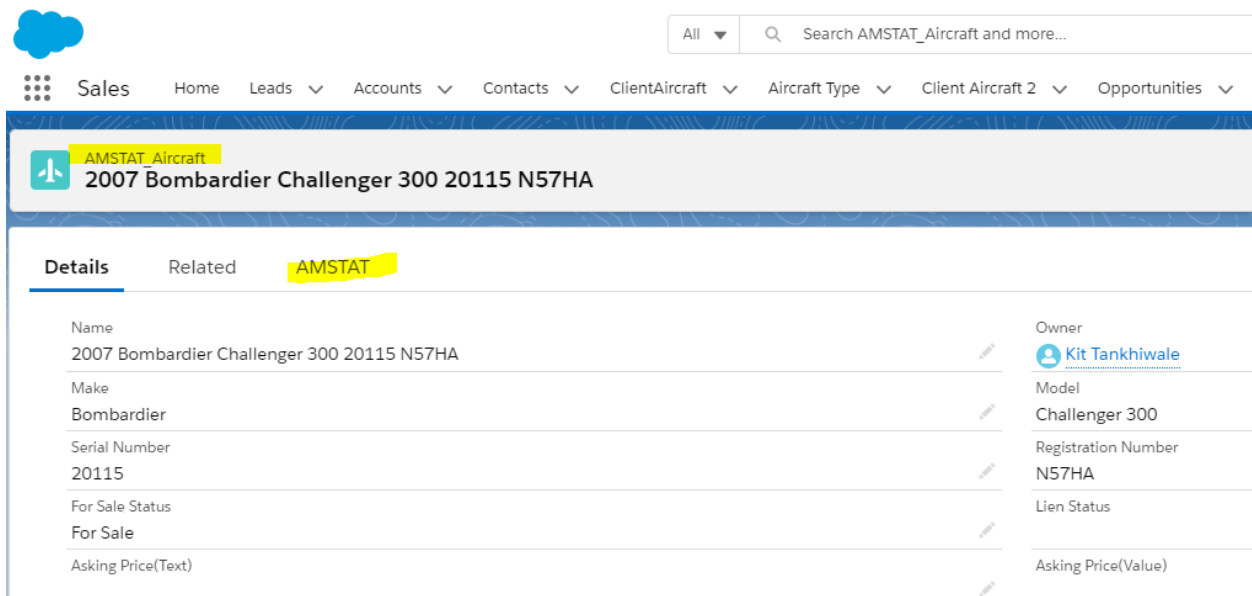
- The Account, Contact, and Lead tabs will include an AMSTAT tab (or section in Classic);



- If you are using your own Aircraft object(s), you will see an AMSTAT tab when you look at the details of an aircraft, as shown below.



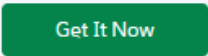
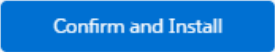
- If you are using AMSTAT's Aircraft object, you will see a new Aircraft object created at the same hierarchy level as Accounts, Contacts, and Leads. That Aircraft object will also have an AMSTAT tab similar to the bullet point above.



AMSTAT for Salesforce® Installation Package

There are several ways to get to the AppExchange in order to upgrade your version of AMSTAT for Salesforce®. The instructions below direct you to appexchange.com using your browser, but you can also access the AppExchange from within your Salesforce® instance.

1. Go to [appexchange.com](https://appexchange.Salesforce.com/appxListingDetail?listingId=a0N3A00000EwBaEUAV), search for AMSTAT or go to:
<https://appexchange.Salesforce.com/appxListingDetail?listingId=a0N3A00000EwBaEUAV>

2. Click on 
3. Install the app in either your Production or Sandbox environment
4. At the Confirm Installation Details screen, agree to the terms and conditions, and click on 
5. Follow the instructions below.

AMSTAT for Salesforce® Installation for Lightning Version – Upgrading from AMSTAT for Salesforce® Version 2.0

These steps are for users who are upgrading their current AMSTAT for Salesforce® instance from Version 2.0 to Version 3.0, and are using the Lightning version of Salesforce®. Scenarios for adding the AMSTAT Aircraft object as well as mapping to an existing Aircraft object are addressed in this section.

Note: If you are planning to upgrade from Version 1 to Version 3, please contact Customer Support to assist you with the installation.

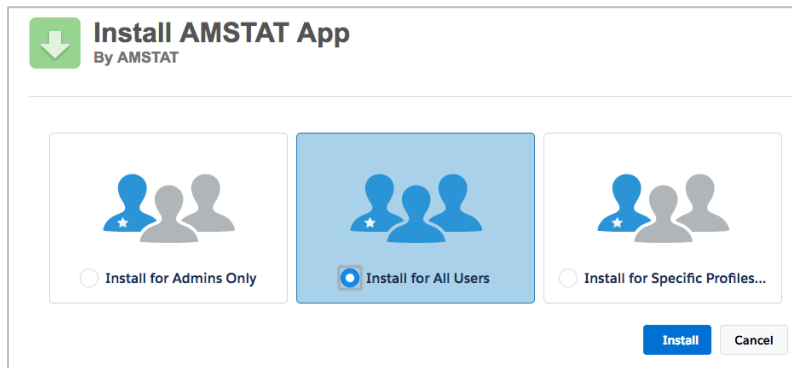
Assumptions


These instructions assume that if you are using Lightning, then you have created pages for Account, Contact and Lead. If not, then you will need to create these before proceeding to the next step. In Classic, these pages already exist.


Step 1 – Select Profile


The first step in the installation process is to give access to AMSTAT for Salesforce® to specific users. We suggest you use 'Install for All Users' (all Salesforce® users have access to AMSTAT for Salesforce®), Admins Only (selective individual users based on permissions), or Specific Profiles (selective profile groups).


Select the preferred option and select 'Install' to start the installation.



 **Install AMSTAT App**
By AMSTAT

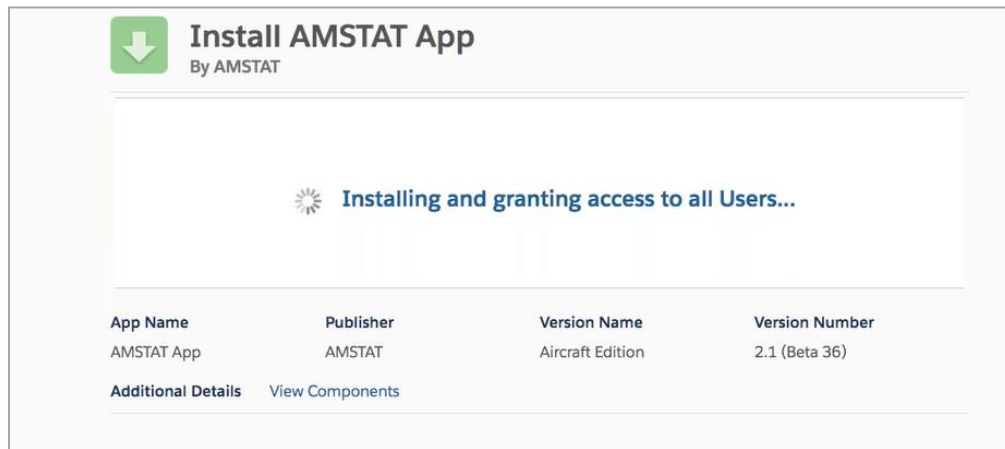
☐  Install for Admins Only

☒  Install for All Users

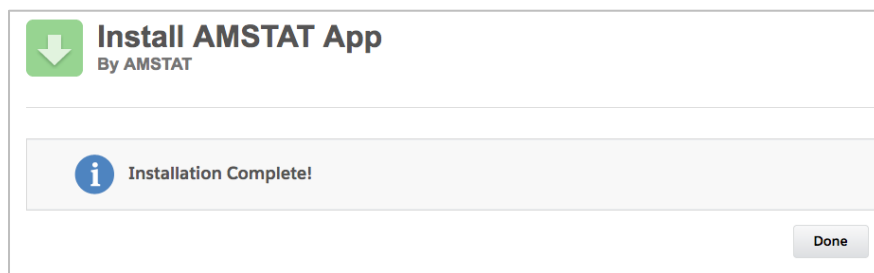
☐  Install for Specific Profiles...

Install **Cancel**


An update similar to the screen below will be displayed, letting you know that the installation is in progress.



After the installation is complete, the message below is displayed. Sometimes, the application installation may take a while. If this is the case, you will receive an email when the application installation has completed.



When the application is installed, click 'Done'. This will take you to the Installed Packages page, similar to what's shown below.



SETUP

Installed Packages


Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com org.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status
Uninstall 	AMSTAT App Description AMSTAT Corp Salesforce App	AMSTAT	3.1.1	AMSTATCORP	Active

Lightning Pages Set Up

This section contains the procedures to either configure your Aircraft object to be synchronized with AMSTAT data or to add the AMSTAT Aircraft object.

Note that there are no changes required to the Account, Contact and Lead pages.

Mapping an Existing Aircraft Object to AMSTAT Fields

The following steps describe how to map your existing Aircraft object to the information available in AMSTAT.

If you use multiple objects to represent a single aircraft, please refer to the next section which describes how to establish this mapping.

Review the definition of your existing Aircraft object using the Object Manager. In this example, we will be using an object called ClientAircraft.

SetupHomeObject Manager

SETUP > OBJECT MANAGERClientAircraft

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Details

Description

API Name
ClientAircraft__c

Custom
✓

Singular Label
ClientAircraft

Plural Label
ClientAircraft

Enable Reports
✓

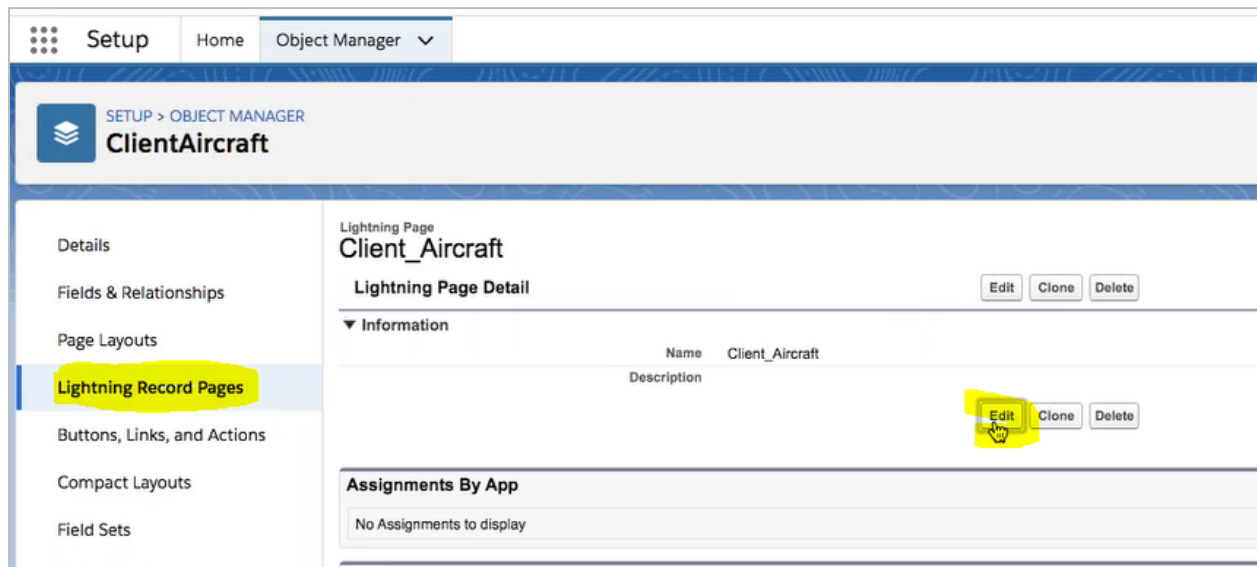
Track Activities
✓

Track Field History

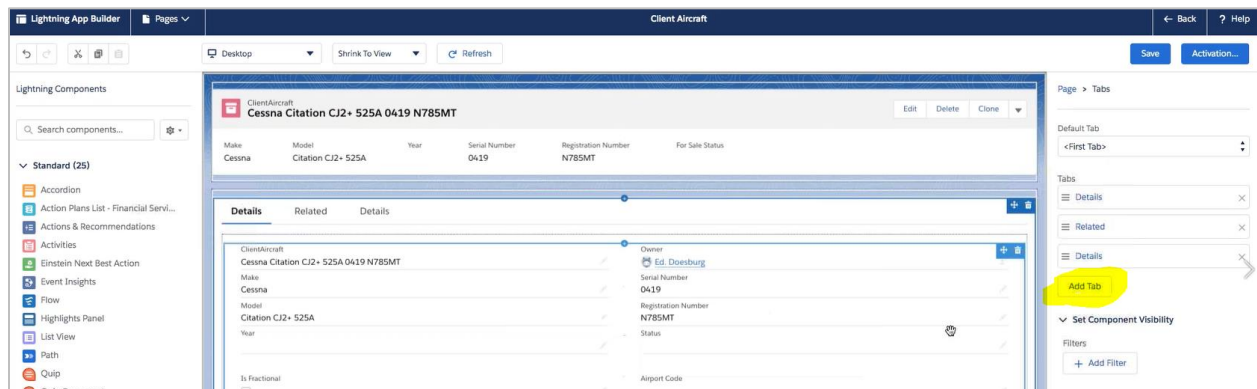
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

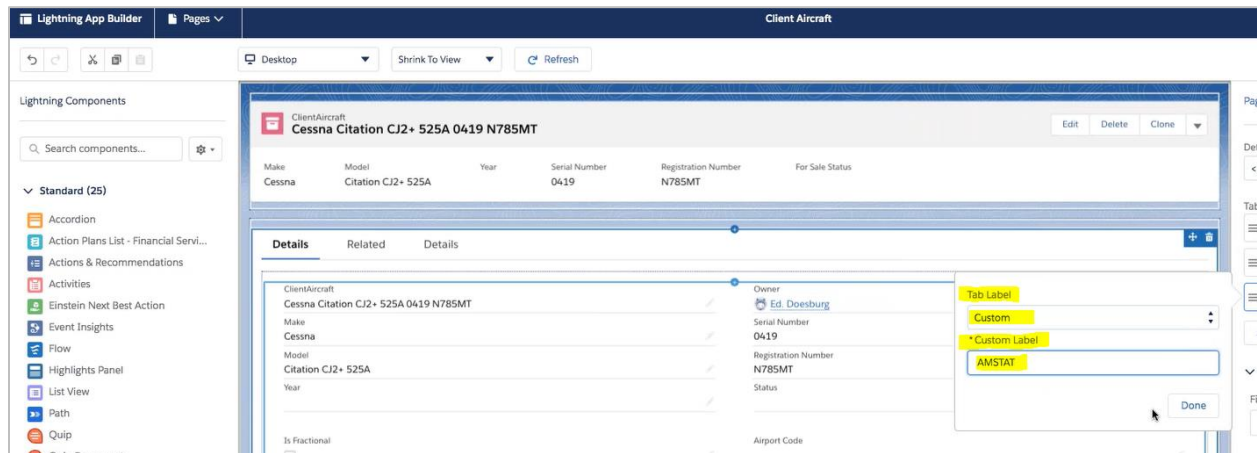
Go to the Lightning Page and click on Edit.



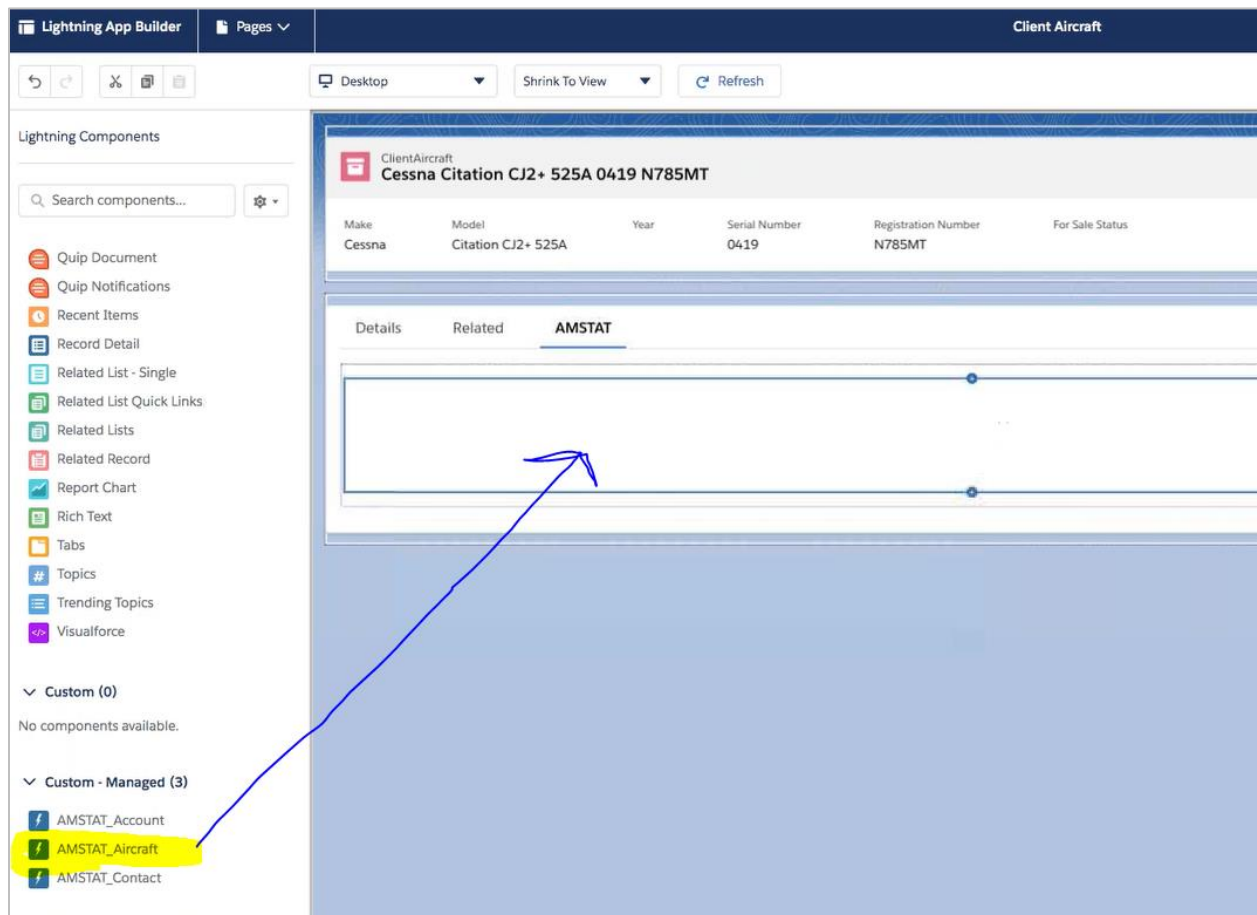
On the right side of the screen, click the button “Add Tab”.



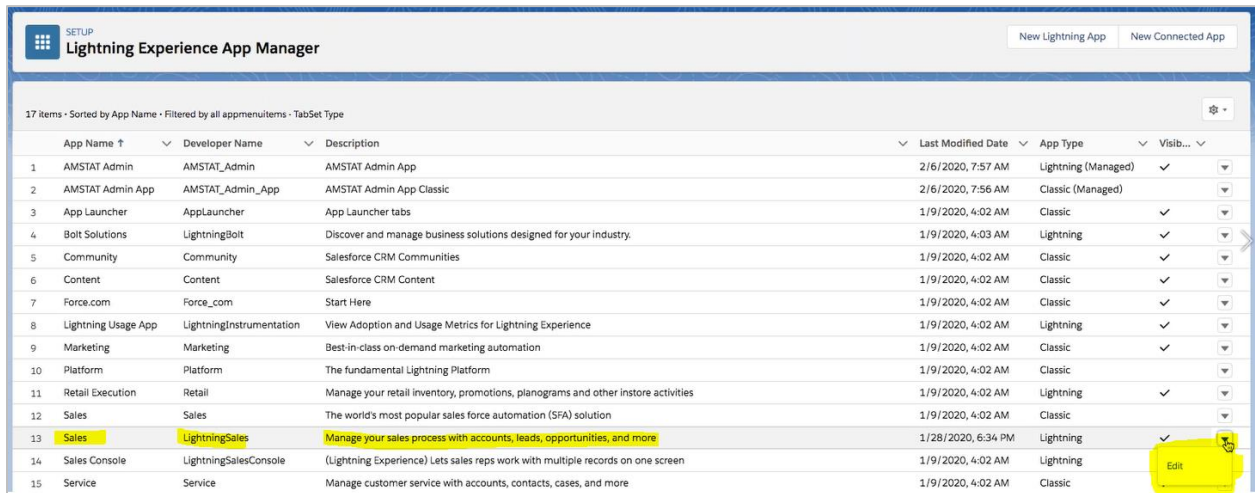
Select “Custom” for the Tag Label and type “AMSTAT” for the Custom Label. Click Done to create the new tab.



Select the new AMSTAT Tab, and you'll see the contents are blank. From the bottom left of the screen, drag the AMSTAT_Aircraft component into the new AMSTAT tab and click Save.

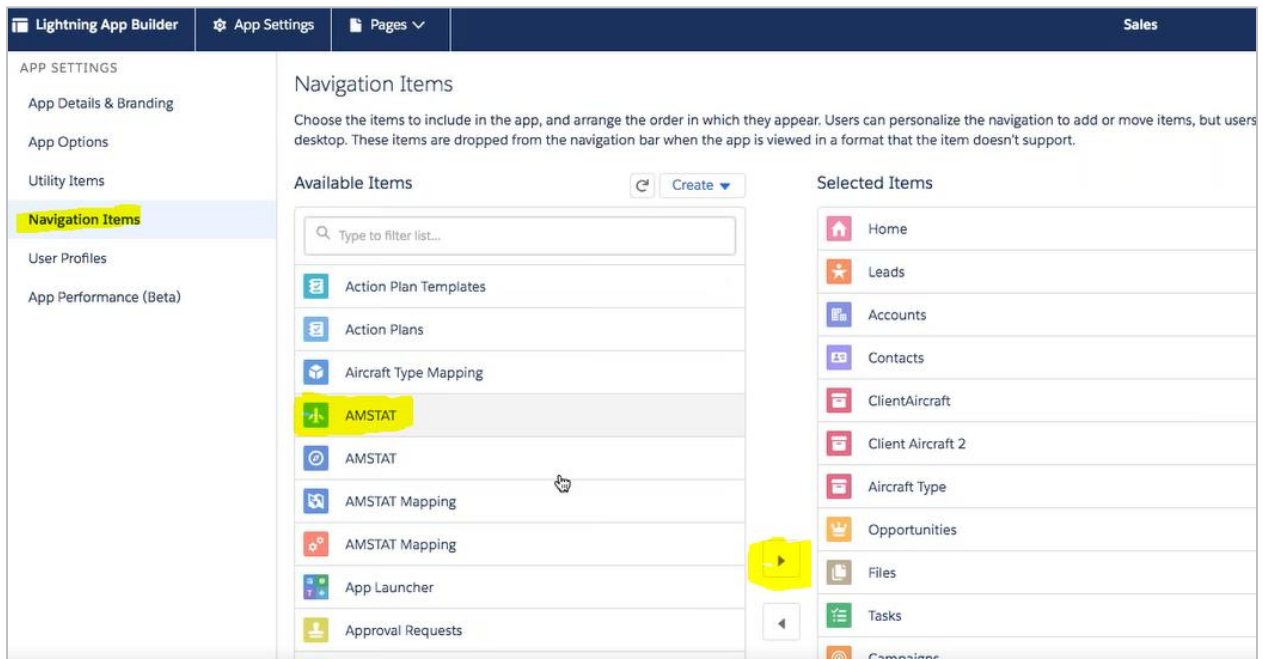


Go to the App Manager to access the Sales Lightning to continue the customization process.



	App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visib...
1	AMSTAT Admin	AMSTAT_Admin	AMSTAT Admin App	2/6/2020, 7:57 AM	Lightning (Managed)	✓
2	AMSTAT Admin App	AMSTAT_Admin_App	AMSTAT Admin App Classic	2/6/2020, 7:56 AM	Classic (Managed)	✓
3	App Launcher	AppLauncher	App Launcher tabs	1/9/2020, 4:02 AM	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/9/2020, 4:03 AM	Lightning	✓
5	Community	Community	Salesforce CRM Communities	1/9/2020, 4:02 AM	Classic	✓
6	Content	Content	Salesforce CRM Content	1/9/2020, 4:02 AM	Classic	✓
7	Force.com	Force_com	Start Here	1/9/2020, 4:02 AM	Classic	✓
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	1/9/2020, 4:02 AM	Lightning	✓
9	Marketing	Marketing	Best-in-class on-demand marketing automation	1/9/2020, 4:02 AM	Classic	✓
10	Platform	Platform	The fundamental Lightning Platform	1/9/2020, 4:02 AM	Classic	✓
11	Retail Execution	Retail	Manage your retail inventory, promotions, planograms and other instore activities	1/9/2020, 4:02 AM	Lightning	✓
12	Sales	Sales	The world's most popular sales force automation (SFA) solution	1/9/2020, 4:02 AM	Classic	✓
13	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	1/28/2020, 6:34 PM	Lightning	✓
14	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	1/9/2020, 4:02 AM	Lightning	✓
15	Service	Service	Manage customer service with accounts, contacts, cases, and more	1/9/2020, 4:02 AM	Classic	✓

Once opened, click on Navigation Items. Under Available items, click on the AMSTAT Aircraft icon and click the button to move it into Selected Items.



Lightning App Builder | App Settings | Pages | Sales

APP SETTINGS

- App Details & Branding
- App Options
- Utility Items
- Navigation Items**
- User Profiles
- App Performance (Beta)

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items Create

Type to filter list...

- Action Plan Templates
- Action Plans
- Aircraft Type Mapping
- AMSTAT**
- AMSTAT
- AMSTAT Mapping
- AMSTAT Mapping
- App Launcher
- Approval Requests

Selected Items

- Home
- Leads
- Accounts
- Contacts
- ClientAircraft
- Client Aircraft 2
- Aircraft Type
- Opportunities
- Files
- Tasks
- Campaigns

Move the AMSTAT Aircraft object to a desired location and click the Save button.

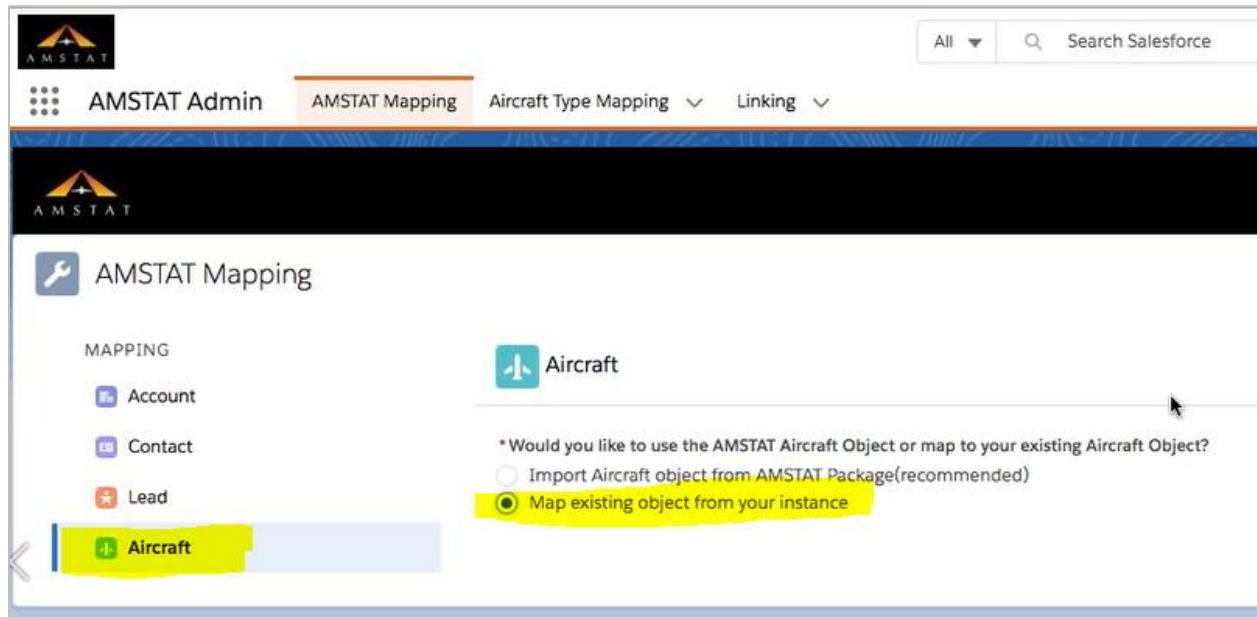
The screenshot shows the Salesforce interface for moving an object. On the left, under 'Available Items', the 'AMSTAT' object is listed. On the right, under 'Selected Items', the 'AMSTAT' object is highlighted in yellow. Below the lists, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in yellow.

Go to the Sales App, open the AMSTAT tab, and enter your AMSTAT credentials.

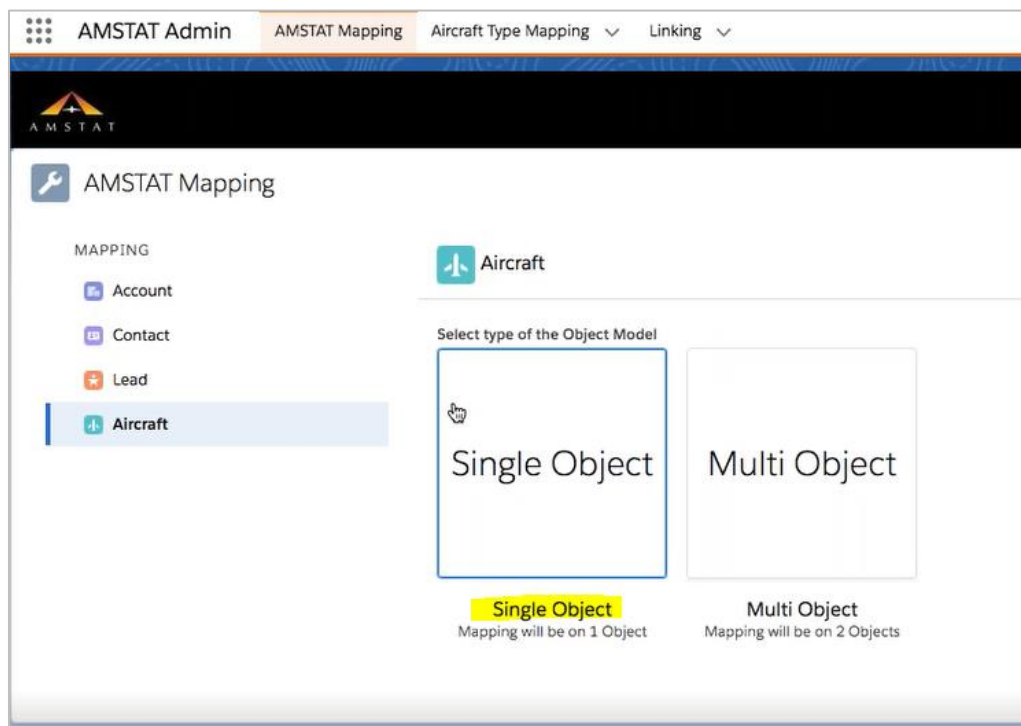
The screenshot shows the Salesforce Sales App interface. The 'AMSTAT' tab is selected in the top navigation bar. Below the navigation bar, the 'AMSTAT' logo is displayed. The main content area shows a 'Login' form with the text 'Please use your AMSTAT login credentials'. The form includes fields for 'User name' and 'Password', both of which are highlighted in yellow. A 'Login' button is located at the bottom right of the form.

Go to the AMSTAT Admin app in order to perform the aircraft attribute mapping.

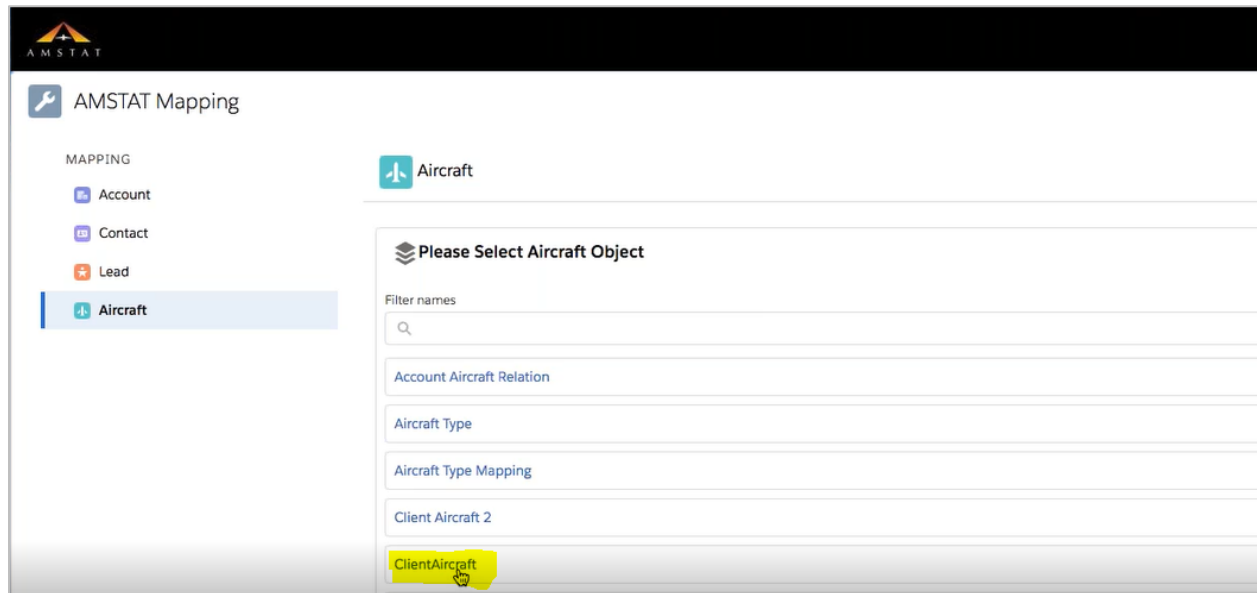
Under the AMSTAT Mapping tab, click on Aircraft on the left-side menu, and select the radio button for “Map existing object from your instance”



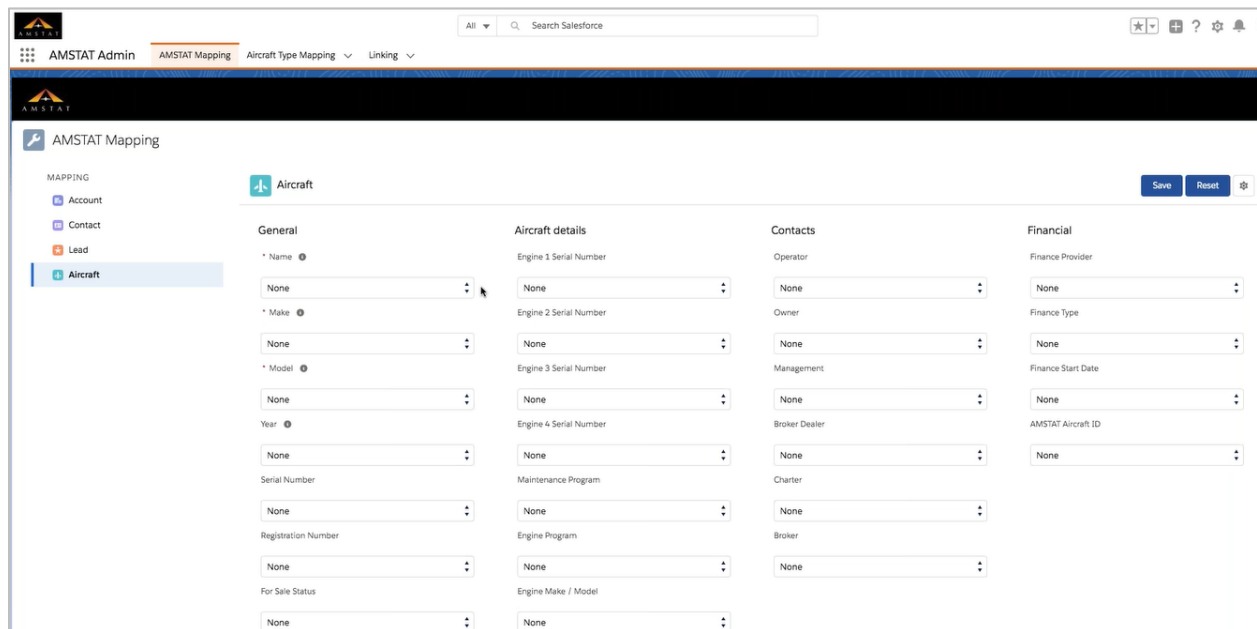
Select the option for a Single Object. The steps for the Multi-Object option are provided in the next section if required.



Select the name of your Aircraft object. As a reminder, in this example we named it ClientAircraft.



You will then see the list of ClientAircraft fields on the screen.



For the General field, select the name of your Aircraft object. In this case, the existing Aircraft object is called ClientAircraft.

The screenshot shows the AMSTAT Admin interface. The top navigation bar includes 'AMSTAT Admin', 'AMSTAT Mapping' (highlighted), 'Aircraft Type Mapping', 'Linking', and '* Recently Viewed'. The main content area is titled 'AMSTAT Mapping' and features a sidebar with 'MAPPING' options: Account, Contact, Lead, and Aircraft (selected). The 'Aircraft' object is selected, and the 'General' tab is active. The 'Name' field is set to 'ClientAircraft'.

Map the rest of the available fields to your Aircraft object. These are the fields that will be shown when looking at the details of the aircraft.

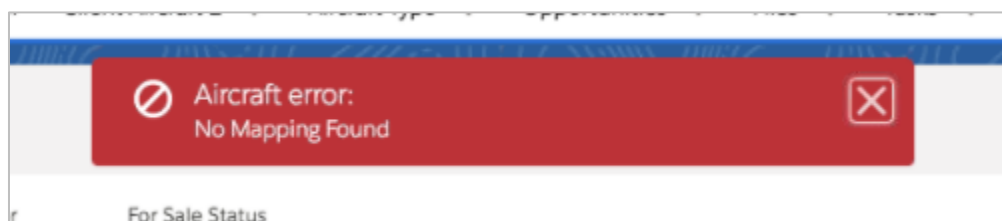
Once the mapping is complete, Click the Save button to preserve your changes.

The screenshot shows the AMSTAT Admin interface with the 'AMSTAT Mapping' page for the 'Aircraft' object. The 'General' tab is selected, and the 'Name' field is set to 'ClientAircraft'. The 'Aircraft details' section shows 'Engine 1 Serial Number' set to 'None' and 'Engine 2 Serial Number' set to 'None'. The 'Contacts' section shows 'Operator' set to 'None' and 'Owner' set to 'None'. The 'Financial' section shows 'Finance Provider' set to 'None' and 'Finance Type' set to 'None'. The 'Save' button is highlighted in yellow.

Return to the Sales app, select an aircraft record, and view the AMSTAT subtab. You will see the AMSTAT-provided information in this tab now.

The screenshot shows the Sales app interface. The top navigation bar includes tabs for Sales, Home, Leads, Accounts, Contacts, ClientAircraft, AMSTAT, Client Aircraft 2, Aircraft Type, Opportunities, Files, Tasks, Campaigns, and Dash. The ClientAircraft tab is selected, and the aircraft record for Cessna Citation CJ2+ 525A 0419 N785MT is displayed. The AMSTAT subtab is active, showing details for the aircraft, including Year (2008), Make (Cessna), Model (Citation CJ2+ 525A), Registration Number (N785MT), Status (Not For Sale), and Asking Price (N/A).

Note: if the mapping is not done, the following error will be shown. If this happens, please review your mapping or contact AMSTAT to help you resolve this issue.



Mapping Multiple Aircraft Objects to AMSTAT Fields

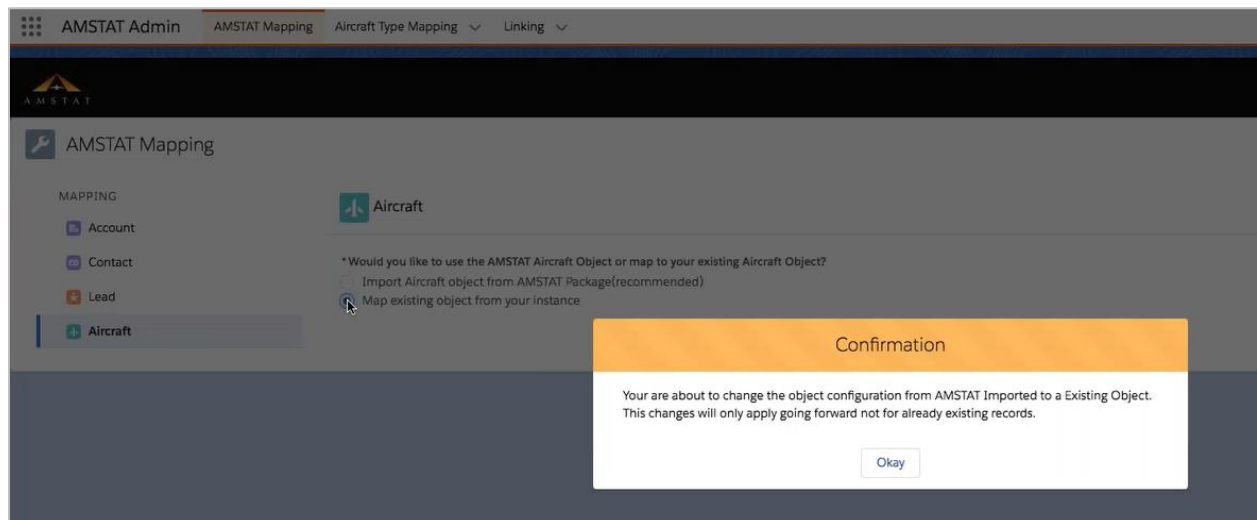
Some clients use two tables to represent an aircraft; one table contains aircraft types (e.g. makes and models), and the other contains a list of specific aircraft (e.g. aircraft type, serial number, tail number). For those clients, the following steps describe how to perform this mapping.

In this example, we will be using objects named "Client Aircraft 2" and "Aircraft Type".

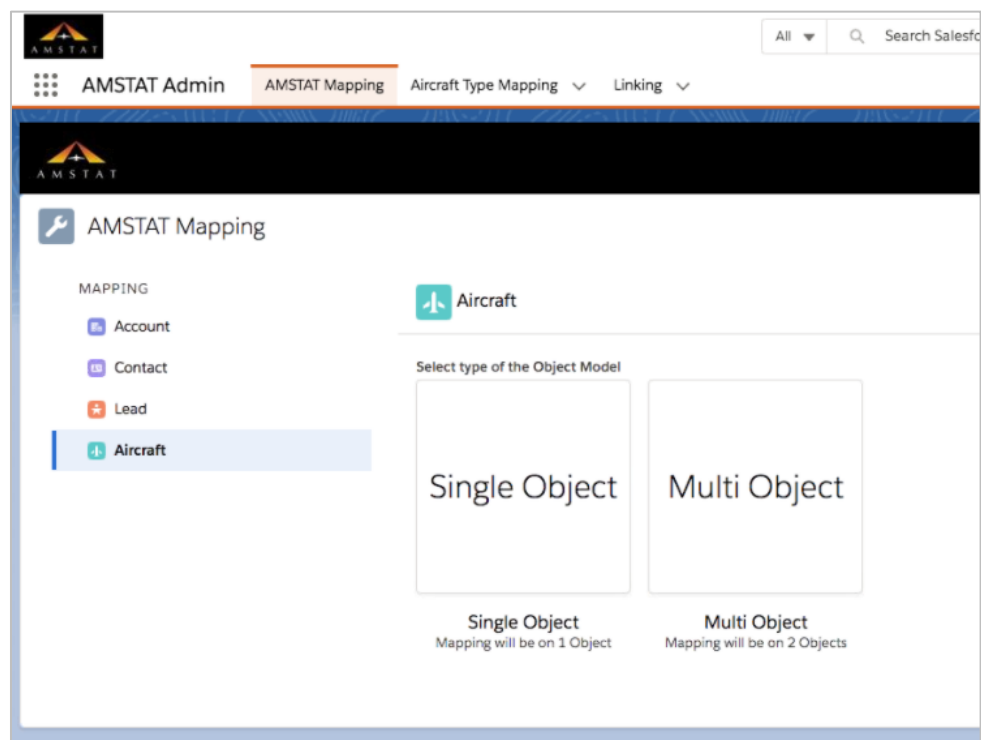
In the AMSTAT Admin App, go to AMSTAT Mapping and select Aircraft. Click the Settings icon.

The screenshot shows the AMSTAT Admin App interface. The top navigation bar includes tabs for AMSTAT Admin, AMSTAT Mapping, Aircraft Type Mapping, and Linking. The AMSTAT Mapping tab is selected, and the Aircraft Type Mapping subtab is active. The Aircraft object is selected, and the Settings icon is highlighted. The mapping interface shows fields for General, Aircraft details, and Financial information.

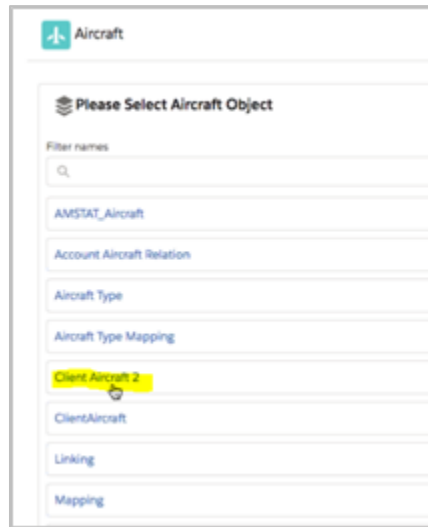
Select the option to Map existing object from your instance. If you've already mapped an aircraft object, the following confirmation will be shown.



Select the Multi Object option.



Select Client Aircraft2 as the first object.



Aircraft

Please Select Aircraft Object

Filter names

AMSTAT_Aircraft

Account Aircraft Relation

Aircraft Type

Aircraft Type Mapping

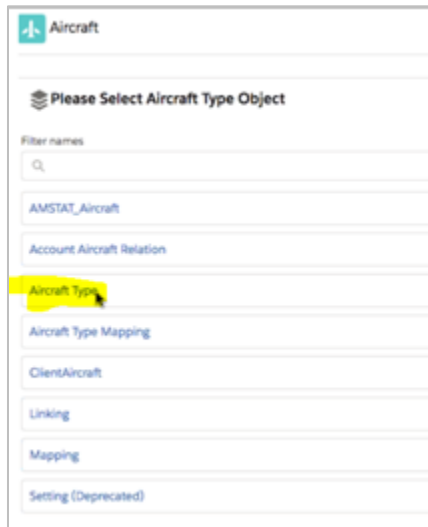
Client Aircraft 2

ClientAircraft

Linking

Mapping

Select Aircraft Type as the second object.



Aircraft

Please Select Aircraft Type Object

Filter names

AMSTAT_Aircraft

Account Aircraft Relation

Aircraft Type

Aircraft Type Mapping

ClientAircraft

Linking

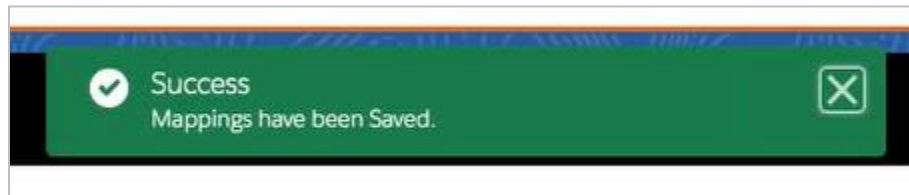
Mapping

Setting (Deprecated)

Map each object's fields to the AMSTAT fields as required.

The screenshot shows the 'AMSTAT Mapping' interface for the 'Aircraft' object. The left sidebar lists objects: Account, Contact, Lead, and Aircraft. The main area is divided into 'General', 'Aircraft details', and 'Financial' sections. The 'General' section has dropdowns for 'Name' (Client Aircraft 2), 'Serial Number' (Serial Number), and 'Registration Number'. The 'Registration Number' dropdown is open, showing options: None, Aircraft Age, Airport Code, Asking Price, Certification, Certification Date, Client Aircraft 2, and Created By ID. The 'Aircraft details' section has dropdowns for Engine 1 through 4 Serial Numbers and Maintenance Program. The 'Financial' section has dropdowns for Finance Pro, Finance Typ, Finance Sta, and AMSTAT Air.

Click next to map the next object. Once completed, save the mappings and the following confirmation will be shown.



Relations will be remapped to show in the new aircraft objects.

The screenshot shows the 'Setup > Object Manager' page for the 'Account Aircraft Relation'. The 'Fields & Relationships' tab is active, showing a table with 7 items. The 'Aircraft' field is highlighted with a yellow background.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROL
Account	AMSTATCORP__Account__c	Lookup(Account)	
Aircraft	Aircraft__c	Lookup(Client Aircraft 2)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Name	Name	Auto Number	
Owner	OwnerId	Lookup(User,Group)	
Role	AMSTATCORP__Role__c	Picklist	

Click on the Aircraft object:

The screenshot shows the Salesforce Setup page for the 'Account Aircraft Relation' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main content area is titled 'Fields & Relationships' and shows a table of fields. The 'Aircraft' field is highlighted in yellow.

FIELD LABEL	FIELD NAME	DATA TYPE
Account	AMSTATCORP__Account__c	Lookup(Account)
Aircraft	Aircraft__c	Lookup(Client Aircraft 2)
Created By	CreatedById	Lookup(User)

Click on “Set Field Level Security”.

The screenshot shows the Salesforce Setup page for the 'Account Aircraft Relation' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main content area is titled 'Account Aircraft Relation Custom Field Aircraft'. Below the title, there is a 'Custom Field Definition Detail' section with a table of field information. The 'Set Field Level Security' button is highlighted in yellow.

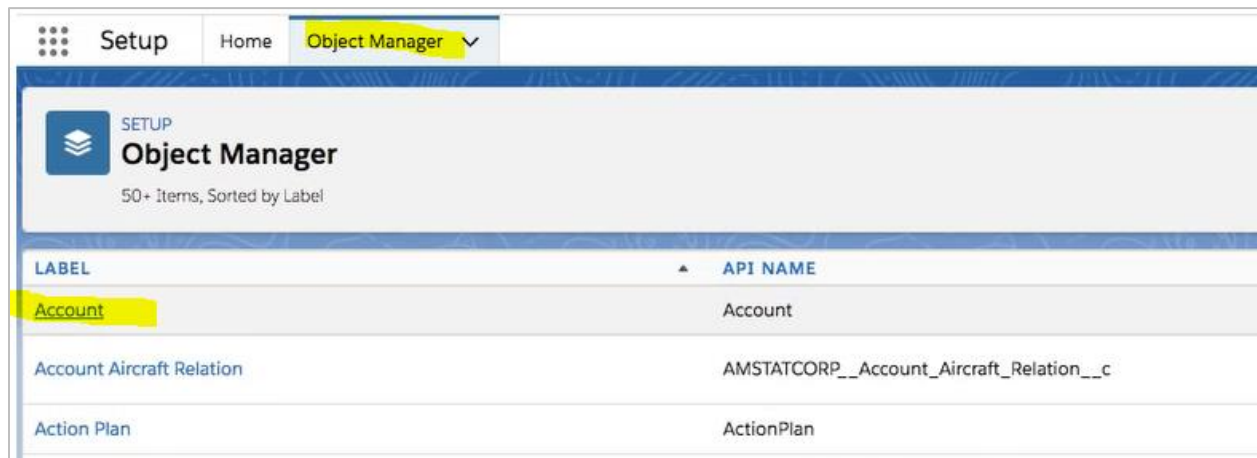
Field Label	Field Name
Aircraft	Aircraft

Click the Visible checkbox at the top of the column to check all the boxes in the column. Click Save.

The screenshot shows the Salesforce Setup page for the 'Account Aircraft Relation' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main content area is titled 'Set Field-Level Security Aircraft'. Below the title, there is a table of field-level security settings for the 'Aircraft' field. The 'Visible' checkbox is highlighted in yellow.

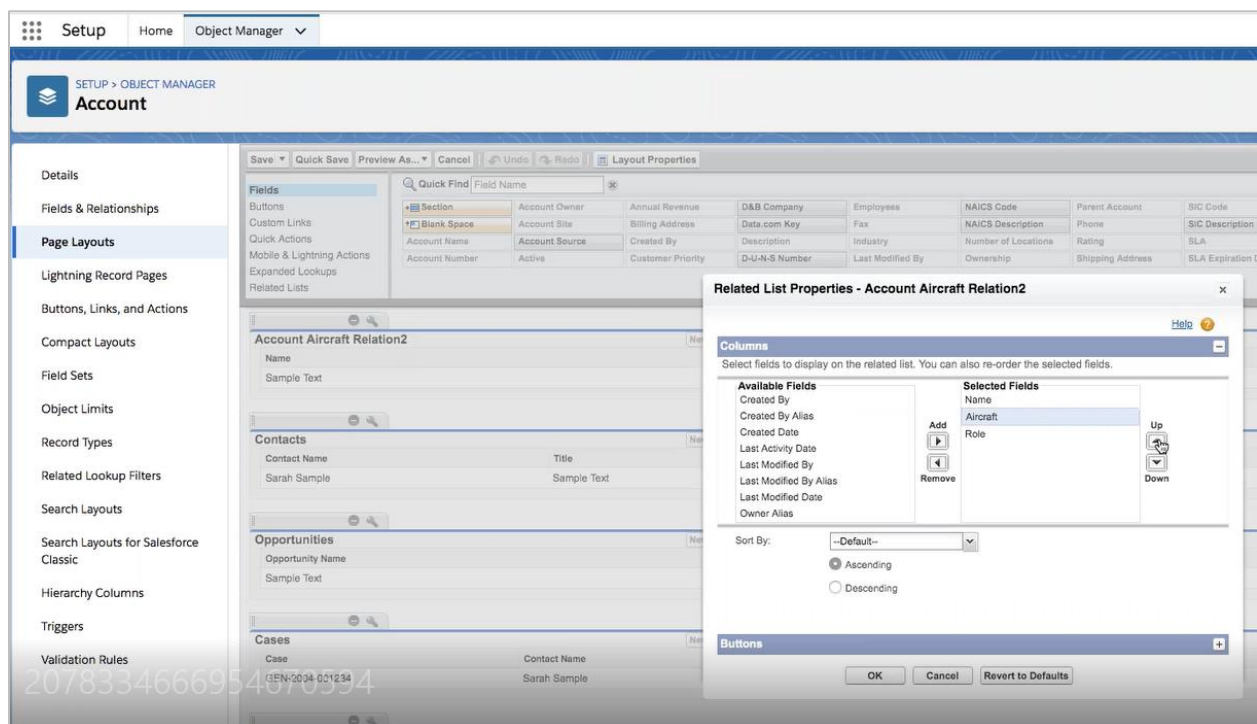
Field-Level Security for Profile	Visible
AMSTAT	<input checked="" type="checkbox"/>
Analytics Cloud Integration User	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>
Chatter Only User	<input checked="" type="checkbox"/>
Company Communities User	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>

Go back to Accounts.



LABEL	API NAME
Account	Account
Account Aircraft Relation	AMSTATCORP__Account_Aircraft_Relation__c
Action Plan	ActionPlan

Click on Page Layout, and add the aircraft again.



2078334666954070334

Repeat this for the Client_Aircraft2 page layout.

The screenshot shows the Salesforce Setup interface for the 'Client Aircraft 2' object. The left sidebar contains a list of setup options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, and Validation Rules. The main area displays the 'Related Lists' section. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below these is a 'Quick Find' search bar with the text 'Related List Name'. A table of related lists is shown, with columns for the list name and a checkbox. The 'Notes & Attachments' list is highlighted. A tooltip for 'Aircraft Relations' is visible, showing a green checkmark and the text 'Aircraft Relations'. Below the table, there are sections for 'System Information' (Header visible on edit only) and 'Custom Links' (Header visible on detail only). The 'Mobile Cards (Salesforce mobile only)' section is also visible, with a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.' The 'Related Lists' section at the bottom shows a list of related lists, with 'Notes & Attachments' highlighted and a note: 'This list is not customizable'.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Client Aircraft 2

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Triggers
Validation Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Related List Name	
Activity History	Files
Aircraft Relations	Notes & Attachments
Approval History	Open Activities
Content Deliveries	Related Content

is Fractional ☒

Field	Value
Fractional Program	Sample Text
Years In Fleet	2.0617
Lien Status	Sample Text
Transaction Date	2/6/2020
Certification	Sample Text
Certification Date	2/6/2020
Transaction Code	Sample Text
Aircraft Type	<u>Sample Text</u>

System Information (Header visible on edit only)
Created By Sample Text

Custom Links (Header visible on detail only)

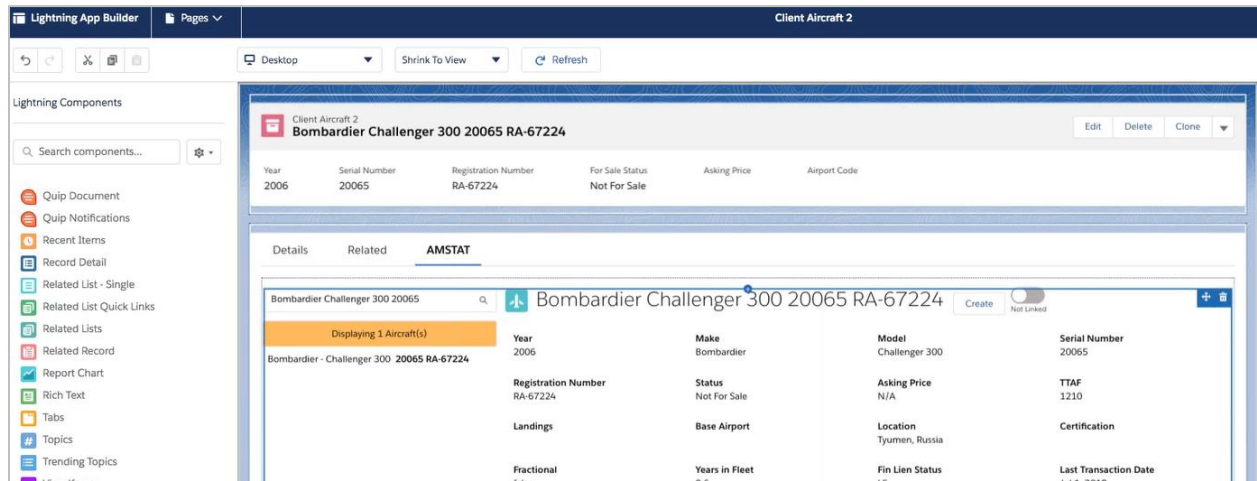
Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Related List Name	
Notes & Attachments	This list is not customizable
Aircraft Relations	

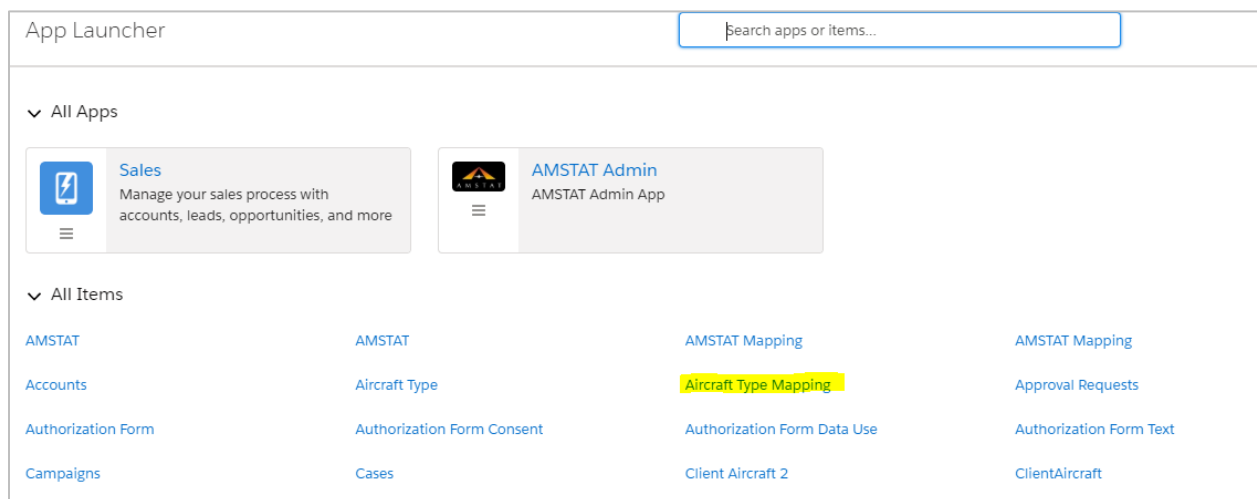
Add the AMSTAT component to your aircraft objects as described in earlier steps.



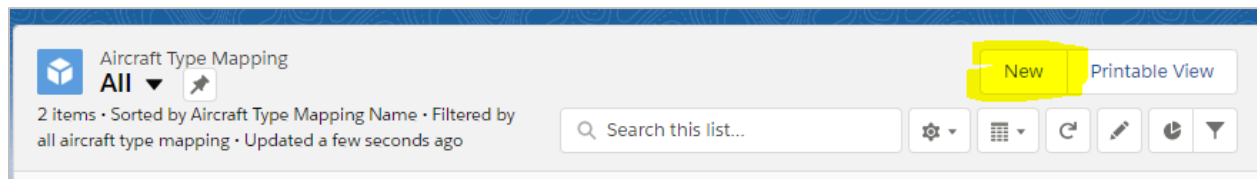
Manipulating Aircraft Make and Model Names

Some clients have different ways of representing the same aircraft. One client may define a particular make as Bombardier and the model as “Global 5000”. Another client may define the make as “Global” and the Model as “5000”. For those clients, AMSTAT provides the ability to transform these names before creating the Salesforce record and keeps the modified Salesforce record in sync with the corresponding AMSTAT record.

Open the App Launcher, and select AMSTAT Type Mapping.



Click the New button on the top right of the screen.




Enter the Make and Model as shown in AMSTAT.

This is a screenshot of a form titled 'New Aircraft Type Mapping'. The form has a section labeled 'Information' containing several fields. 'Aircraft Type Mapping Name' and 'Owner' (Kit Tankhiwale) are at the top. Below them are two columns of fields. The left column has 'AMSTAT Make' with the value 'Bombardier' and 'AMSTAT Model' with the value 'Global 5000', both highlighted in yellow. The right column has 'Mapped Make' and 'Mapped Model' fields, which are currently empty. At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and 'Save'.

Enter the make and model as it's represented in your system and click the Save button.

This screenshot shows the same 'New Aircraft Type Mapping' form as before, but with updated values. In the 'Mapped Make' field, the word 'Global' is entered and highlighted in yellow. In the 'Mapped Model' field, the number '5000' is entered and highlighted in yellow. All other fields, including the AMSTAT values and the 'Save' button, remain the same as in the previous screenshot.

You will see a confirmation that the transformation rule has been created.


Aircraft Type Mapping
ATM-0002
Edit


Related


Details

Aircraft Type Mapping Name
ATM-0002

AMSTAT Make ⓘ
Bombardier


AMSTAT Model ⓘ
Global 5000

Created By
 Kit Tankhiwale, 1/30/2020, 2:05 PM

Owner
 Kit Tankhiwale

Mapped Make ⓘ
Global

Mapped Model ⓘ
5000

Last Modified By
 Kit Tankhiwale, 1/30/2020, 2:05 PM

Using the AMSTAT Aircraft Object

If you don't have an aircraft object already defined, you can use an AMSTAT-developed Aircraft object, which represents the needs of many of our clients.

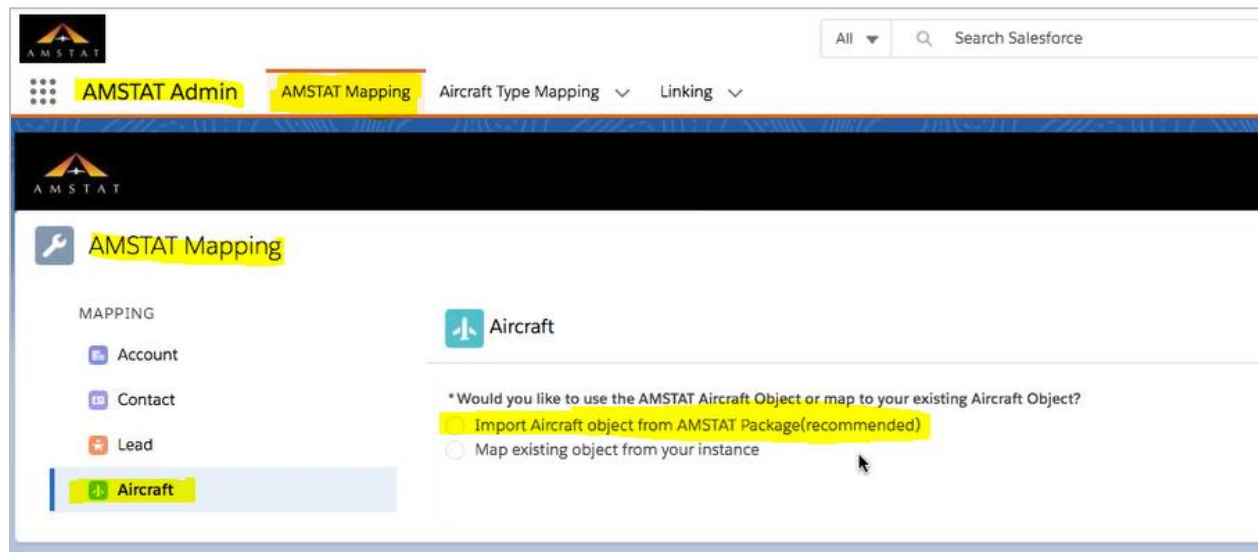
NOTE: If you are using Salesforce Professional Edition, you must create your own custom Aircraft object. The AMSTAT Aircraft object will not automatically install on Salesforce Professional. The following AMSTAT information is available to create your own object definition:

Name	Engine 1 Serial Number
Make	Engine 2 Serial Number
Model	Engine 3 Serial Number
Serial Number	Engine 4 Serial Number
Registration Number	Maintenance Program
Year	Engine Program
TTAF	Engine Make / Model
Landings	Number of Engines
Certification	TSN Engine 1
Certification Date	TSN Engine 2
For Sale Status	TSN Engine 3
Asking Price Text	TSN Engine 4
Asking Price Value	TSOH Engine 1
Location	TSOH Engine 2
Base Airport	TSOH Engine 3
Is Fractional	TSOH Engine 4

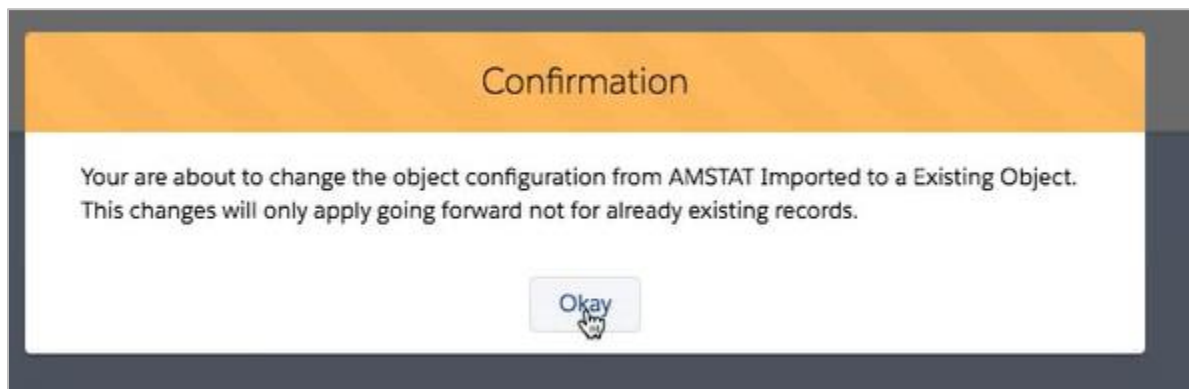
Fractional Program	TTOH Engine 1
Years in Fleet	TTOH Engine 2
Fin Lien Status	TTOH Engine 3
Transaction Code	TTOH Engine 4
Last Transaction Date	APU Type
AMSTAT Aircraft ID	APU Plan
Finance Provider	ADS-B
Finance Type	Interior
Finance Start Date	Interior Date
	Exterior Date
	Passenger Count
	Is Fixed Wing

The following steps describe the procedure to install and configure the AMSTAT Aircraft object.

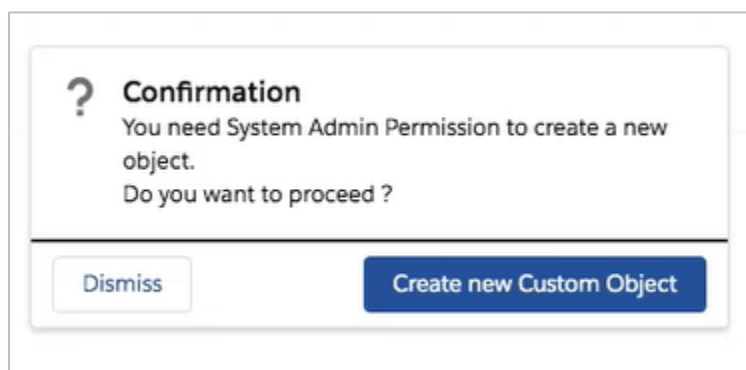
Open the AMSTAT Admin, go to AMSTAT Mapping, and select the option to import the Aircraft Object from the AMSTAT Package.



Note: If you have already mapped AMSTAT information to your existing aircraft object(s), the following notification will come up. Click OK to continue or press Esc to cancel.

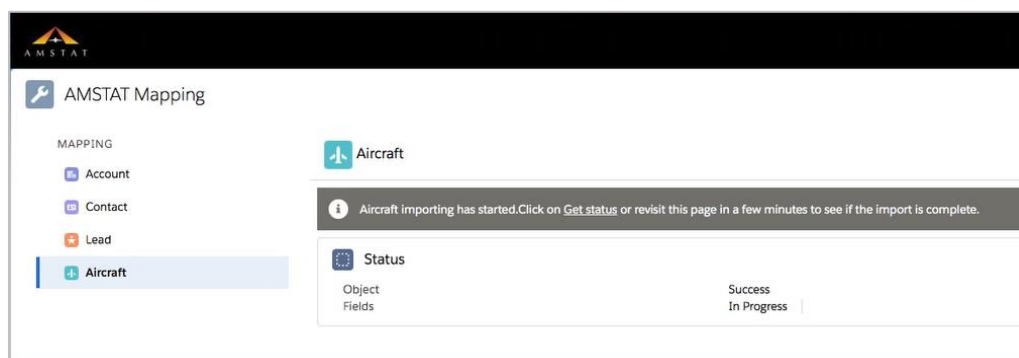


The app will ask for confirmation, since you will need Admin permissions for some of these tasks. Click the “Create new Custom Object” button to proceed.

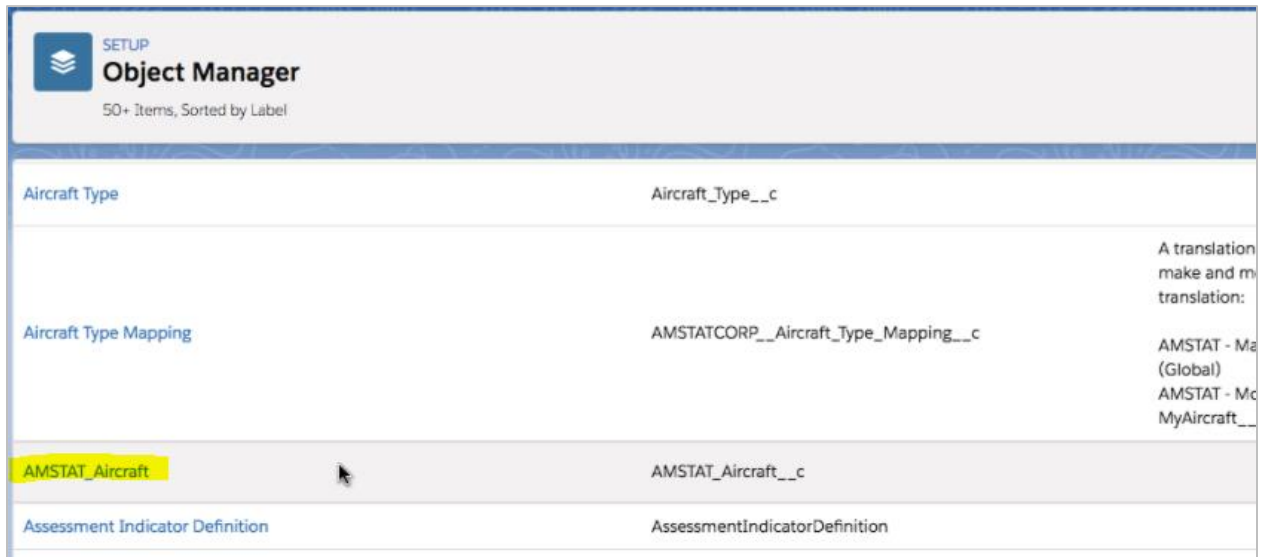


You will see a Success message indicating that the process has started. The following screen will be shown until all the necessary fields are created.

Note: The process to create the required attributes may take some time. You can continue using Salesforce while this task continues working in the background.



Go to the Object Manager and confirm that the AMSTAT Aircraft object has been created.



SETUP Object Manager	
50+ Items, Sorted by Label	
Aircraft Type	Aircraft_Type__c
Aircraft Type Mapping	AMSTATCORP__Aircraft_Type_Mapping__c
AMSTAT_Aircraft	AMSTAT_Aircraft__c
Assessment Indicator Definition	AssessmentIndicatorDefinition

Two page layouts are created by the installation and process and must be configured properly. Go to Page Layout Assignment and you'll see the following:

Setup

Home

Object Manager

SEARCH

Search Setup

SETUP > OBJECT MANAGER

AMSTAT_Aircraft

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts

2 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME

CREATED BY

MODIFIED BY

AMSTAT_Aircraft Layout

Ed. Doesburg, 2/6/2020, 8:13 AM

Ed. Doesburg, 2/6/2020, 8:13 AM

AMSTAT_Aircraft_Default Layout

Ed. Doesburg, 2/6/2020, 8:15 AM

Ed. Doesburg, 2/6/2020, 8:15 AM

Quick Find

Click on Page Layout Assignment.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

AMSTAT_Aircraft

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Page Layouts

2 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
AMSTAT_Aircraft Layout	Ed. Doesburg, 2/6/2020, 8:13 AM	Ed. Doesburg, 2/6/2020, 8:13 AM
AMSTAT_Aircraft_Default Layout	Ed. Doesburg, 2/6/2020, 8:15 AM	Ed. Doesburg, 2/6/2020, 8:15 AM

For Page Layout to Use, select “AMSTAT_Aircraft_Default Layout” and click Save.

SETUP > OBJECT MANAGER
AMSTAT_Aircraft

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Edit Page Layout Assignment
AMSTAT_Aircraft

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.

Save Cancel

Page Layout To Use: **AMSTAT_Aircraft_Default Layout** (29 Selected, 0 Changed)

Profiles	Page Layout
AMSTAT	AMSTAT_Aircraft_Default Layout
Analytics Cloud Integration User	AMSTAT_Aircraft_Default Layout
Analytics Cloud Security User	AMSTAT_Aircraft_Default Layout
Chatter External User	AMSTAT_Aircraft_Default Layout
Chatter Free User	AMSTAT_Aircraft_Default Layout
Chatter Moderator User	AMSTAT_Aircraft_Default Layout
Chatter Only User	AMSTAT_Aircraft_Default Layout
Company Communities User	AMSTAT_Aircraft_Default Layout
Contract Manager	AMSTAT_Aircraft_Default Layout

The following screen will now be shown, indicating the correct Page Layout.

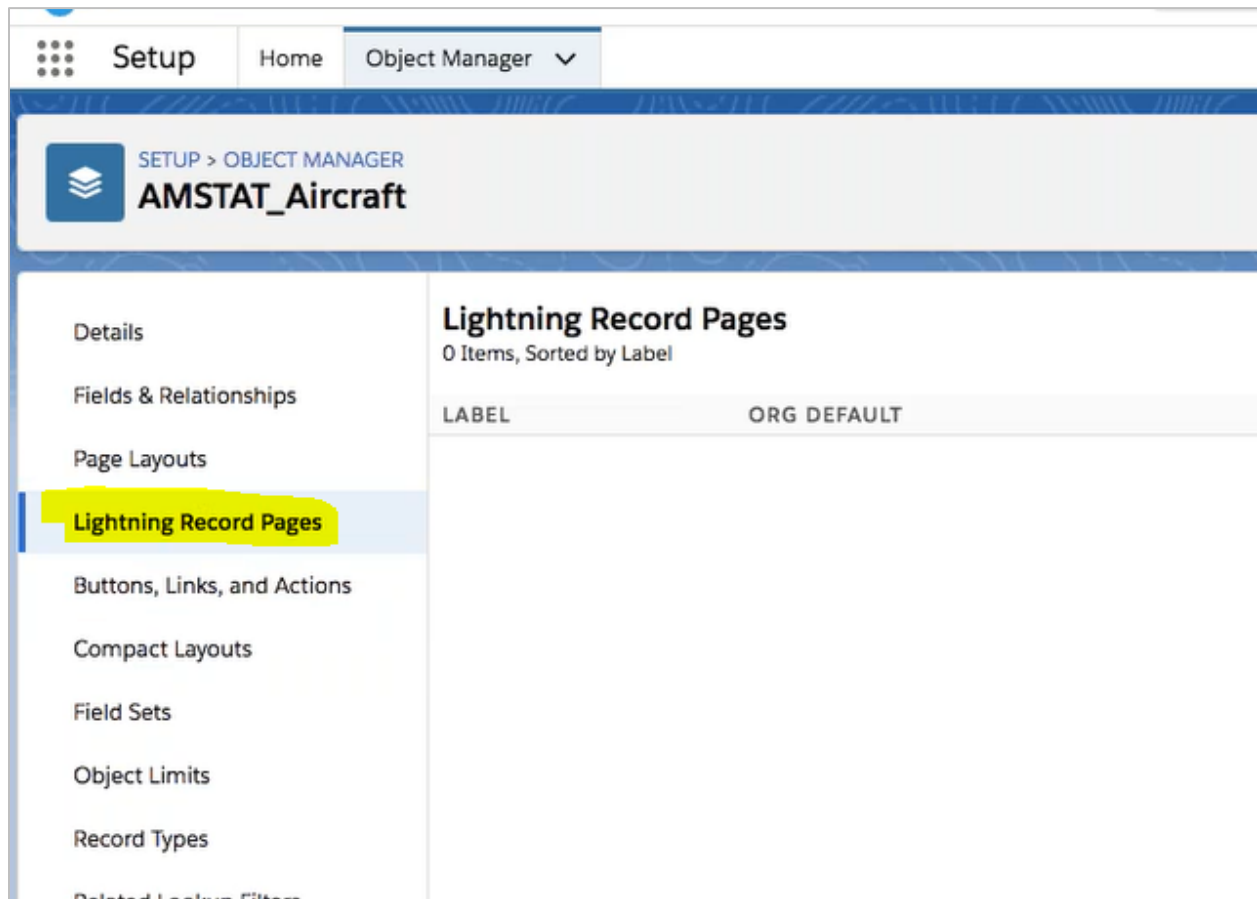
Page Layout Assignment
AMSTAT_Aircraft
[Back to Custom Object: AMSTAT_Aircraft](#)

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

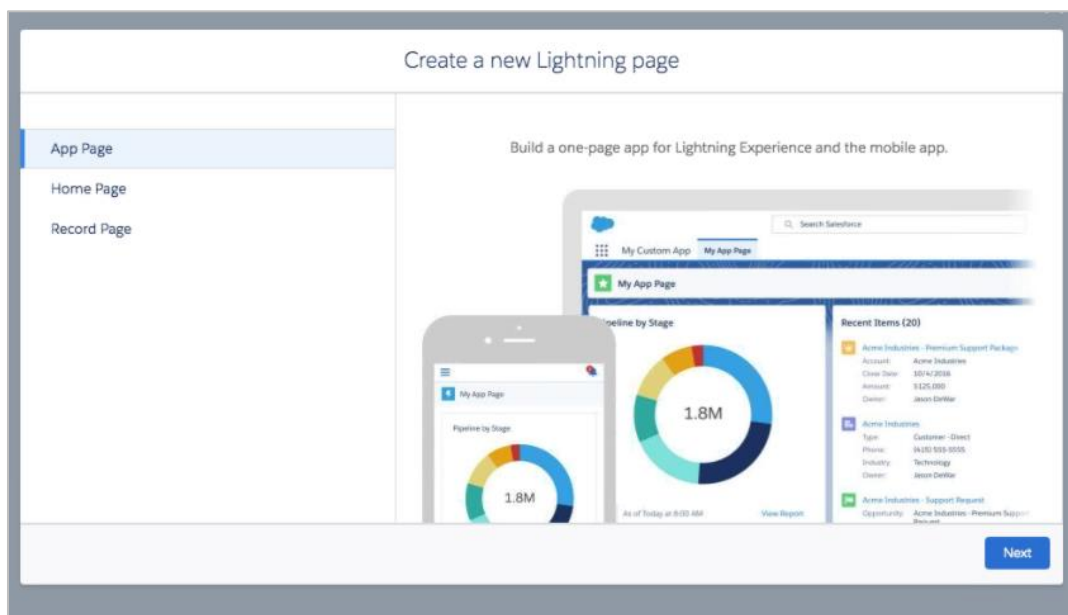
Edit Assignment

Profiles	Page Layout
AMSTAT	AMSTAT_Aircraft_Default Layout
Analytics Cloud Integration User	AMSTAT_Aircraft_Default Layout
Analytics Cloud Security User	AMSTAT_Aircraft_Default Layout
Chatter External User	AMSTAT_Aircraft_Default Layout
Chatter Free User	AMSTAT_Aircraft_Default Layout
Chatter Moderator User	AMSTAT_Aircraft_Default Layout
Chatter Only User	AMSTAT_Aircraft_Default Layout
Company Communities User	AMSTAT_Aircraft_Default Layout
Contract Manager	AMSTAT_Aircraft_Default Layout
Cross Org Data Proxy User	AMSTAT_Aircraft_Default Layout
Custom: Marketing Profile	AMSTAT_Aircraft_Default Layout
Custom: Sales Profile	AMSTAT_Aircraft_Default Layout
Custom: Support Profile	AMSTAT_Aircraft_Default Layout
External Apps Plus Login User	AMSTAT_Aircraft_Default Layout
External Apps Plus User	AMSTAT_Aircraft_Default Layout
Force.com - Free User	AMSTAT_Aircraft_Default Layout
Gold Partner User	AMSTAT_Aircraft_Default Layout
Marketing User	AMSTAT_Aircraft_Default Layout
Partner Community Login User	AMSTAT_Aircraft_Default Layout
Partner Community User	AMSTAT_Aircraft_Default Layout
Partner User	AMSTAT_Aircraft_Default Layout
Read Only	AMSTAT_Aircraft_Default Layout
Service Cloud	AMSTAT_Aircraft_Default Layout
Silver Partner User	AMSTAT_Aircraft_Default Layout
Solution Manager	AMSTAT_Aircraft_Default Layout
Standard Platform User	AMSTAT_Aircraft_Default Layout
Standard User	AMSTAT_Aircraft_Default Layout

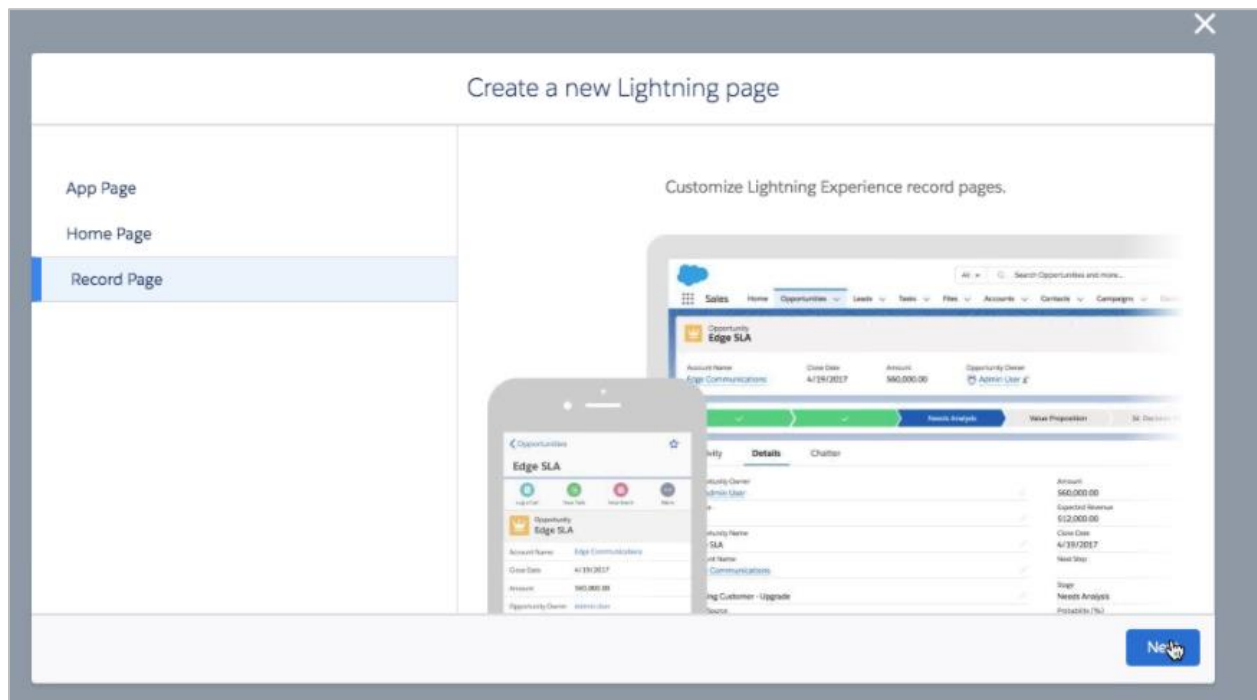
Click on “Lightning Record Pages” on the left side menu.



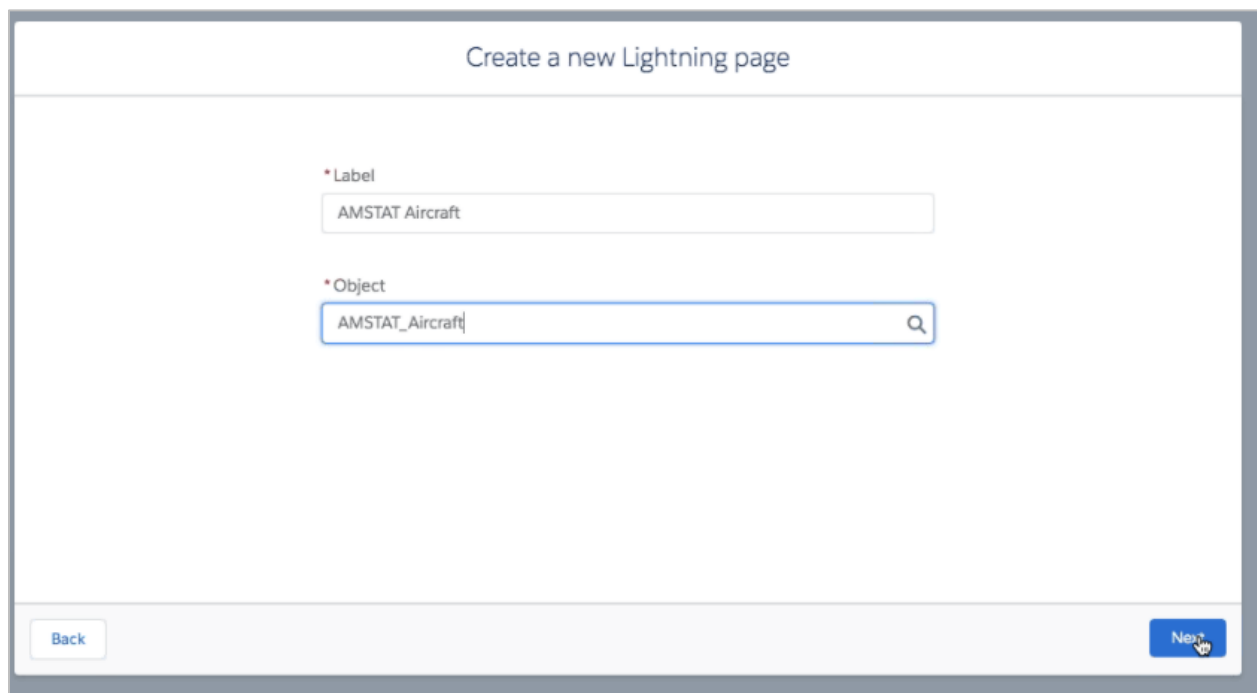
You will see the following screen:



Select the Record Page and click Next.



Enter the label “AMSTAT Aircraft” and select “AMSTAT_Aircraft” in the Object list. Click Next.



Select a page template. AMSTAT recommends “Header and One Region”, but you can choose another option if it’s more appropriate for your usage. Click the “Finish” button.

Create a new Lightning page

CHOOSE PAGE TEMPLATE CLONE SALESFORCE DEFAULT PAGE

STANDARD (16)

- Grouped Header and One Region
- Header and Left Sidebar
- Header and One Region**
- Header and Right Sidebar
- Header and Three Regions
- Header and Two Equal Regions
- Header, Subheader, Left Sidebar
- Header, Subheader, Right Sidebar

Full-width header above a single main region. On a phone, the regions stack vertically.

Supported form factors: desktop and phone.

Back Finish

The system will inform you that there is no data for this object, which is expected. Click OK to proceed.

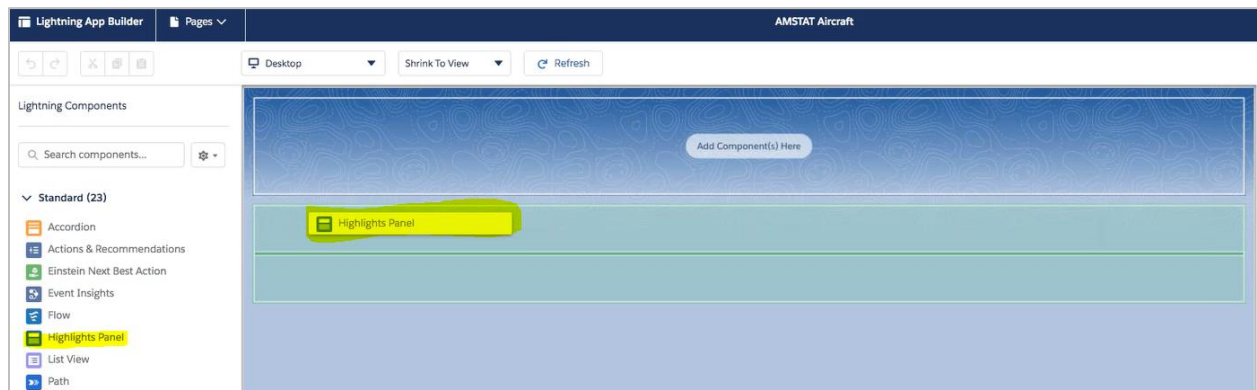
No Data for this Object

No records have been created for this Object. You can view and modify the components on the page, but won't see their contents until there is data to show.

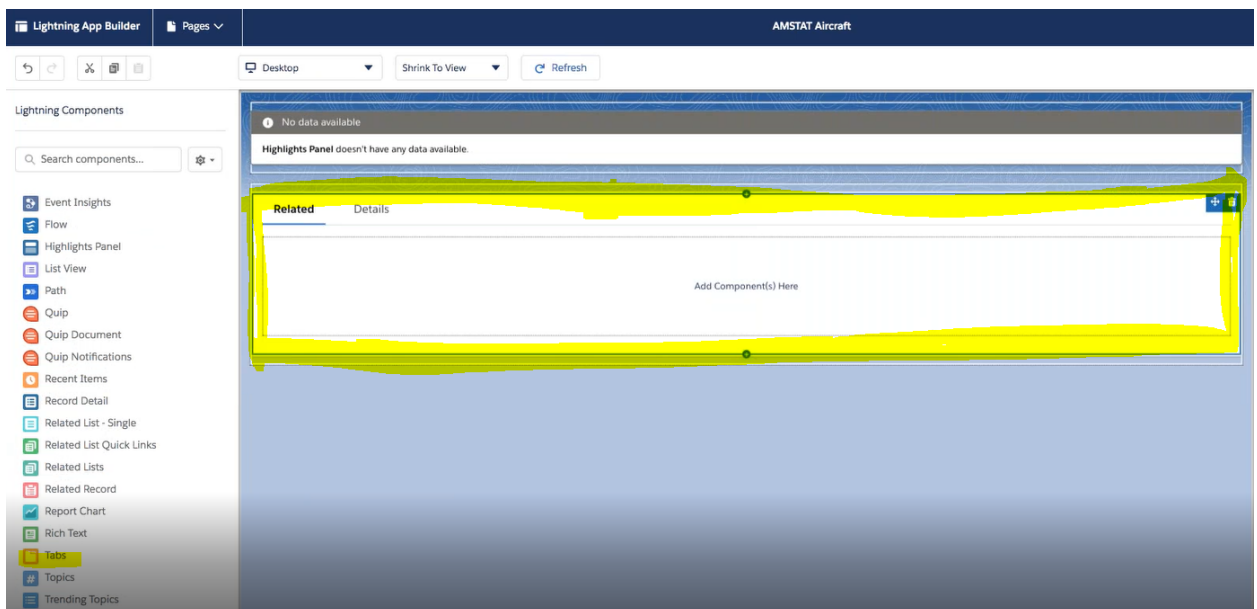
☐ Don't show me this message again

OK

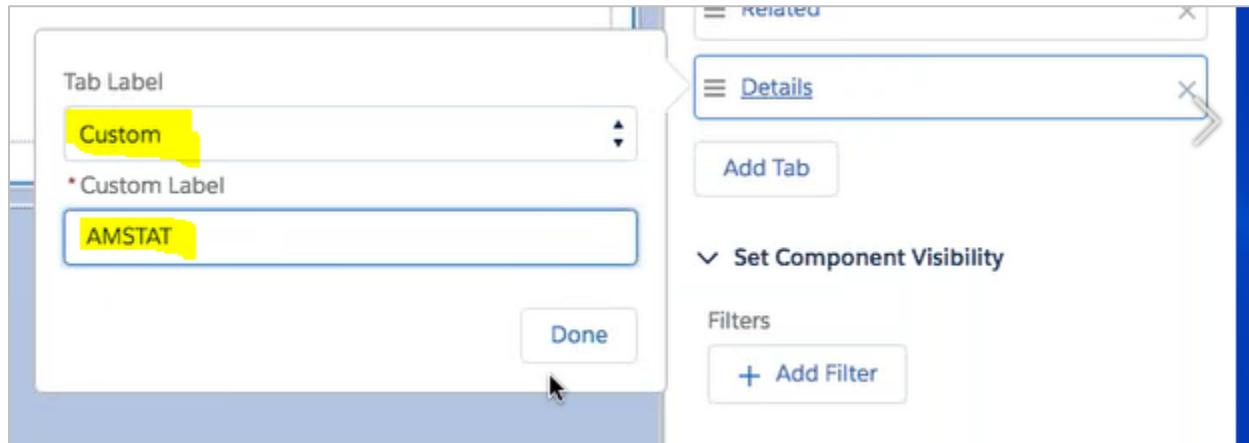
From the menu on the left, drag the Highlight panel into the top of the components window.



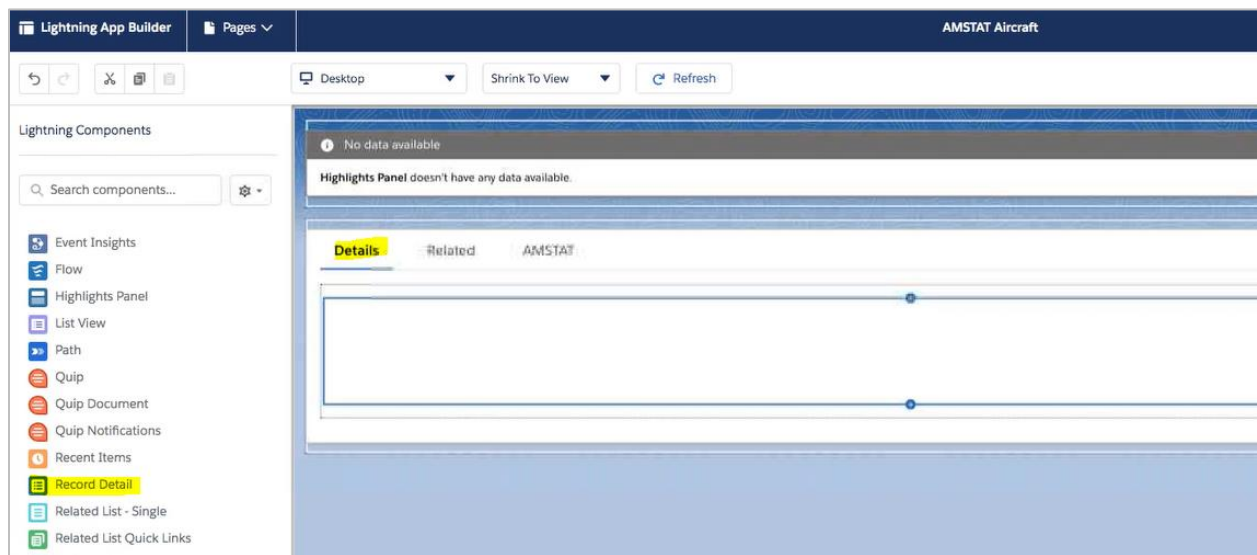
Add the Tabs panel in to the component.



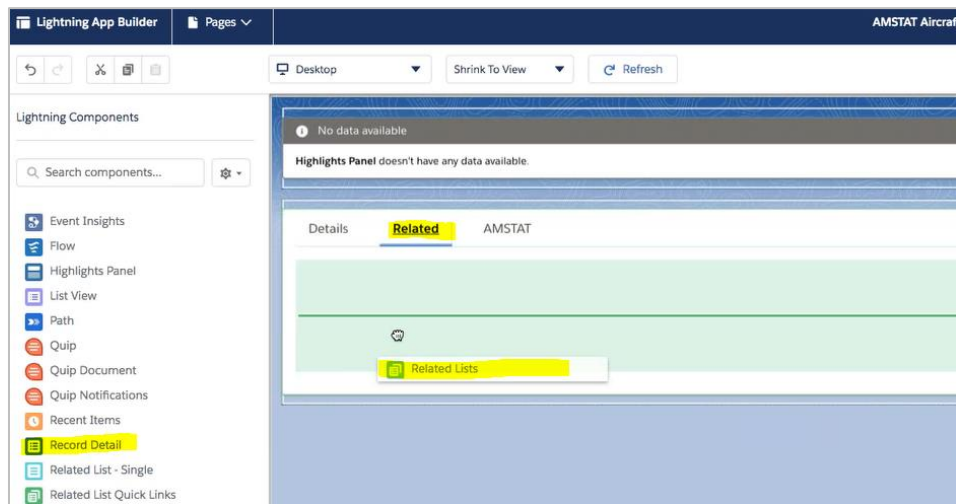
Add the AMSTAT subtab to the tab you just created by clicking “Add Tab” on the right side, and selecting Custom. Select “Custom” for the Tab Label and enter “AMSTAT” for the Custom Label. Click “Done”.



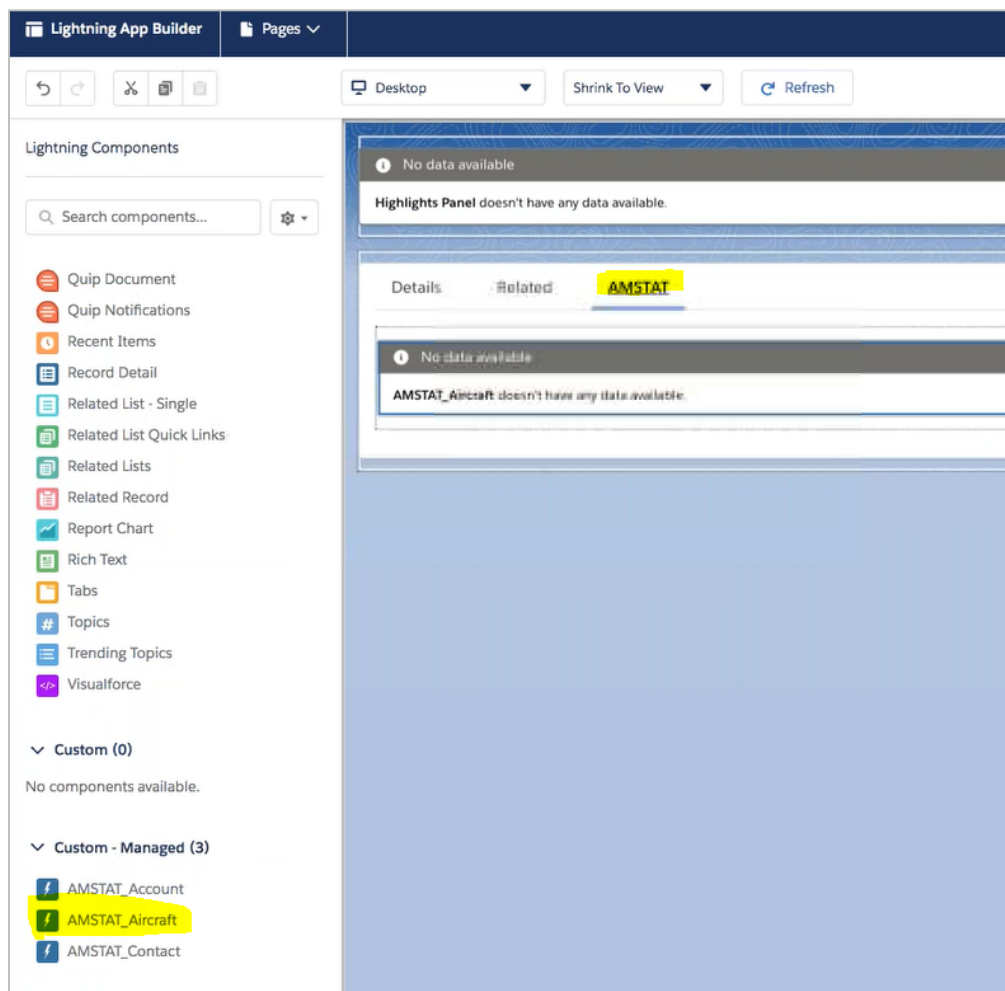
Drag Record Details into the Details component.



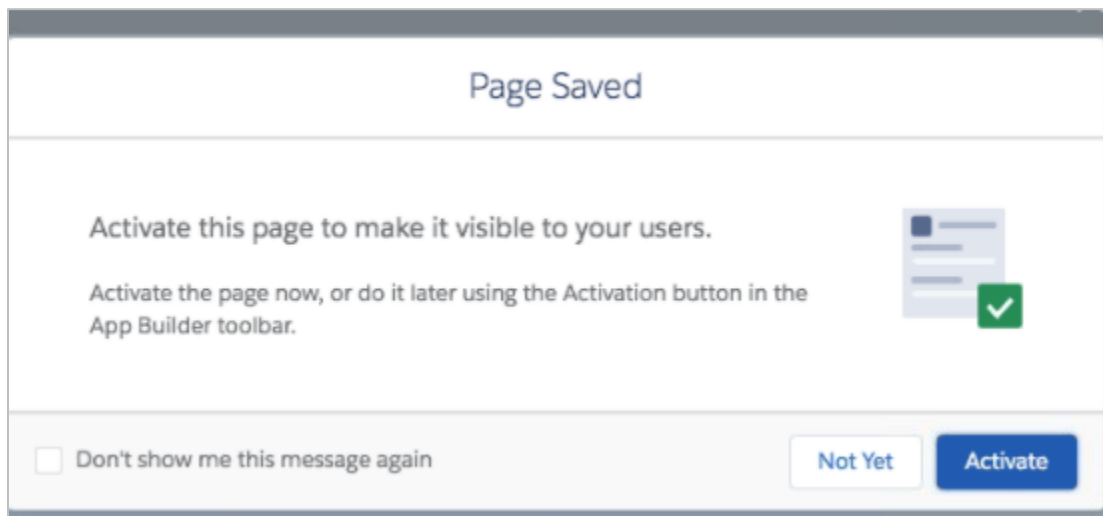
Click the Related tab and drag “Related Lists” into the tab.



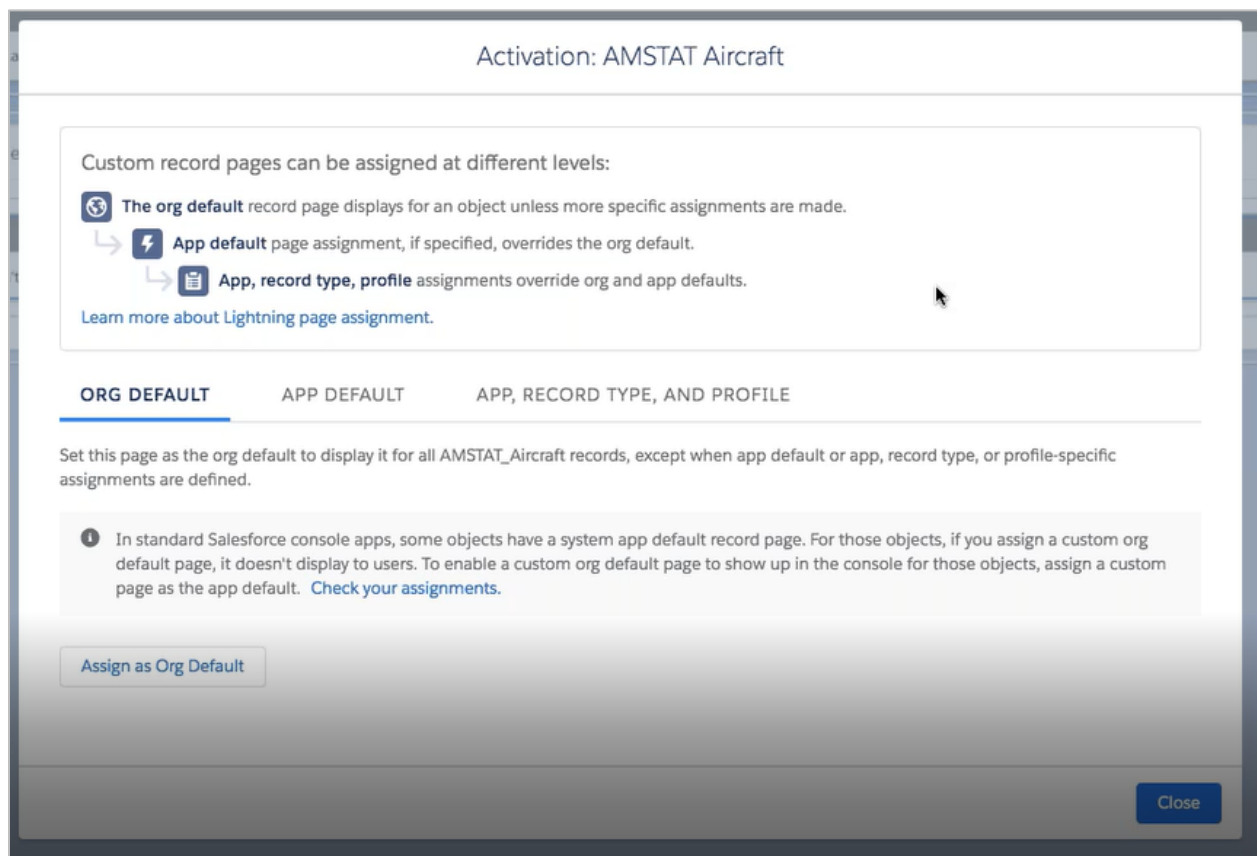
Click the AMSTAT tab and drag the Custom AMSTAT_Aircraft object into the tab.



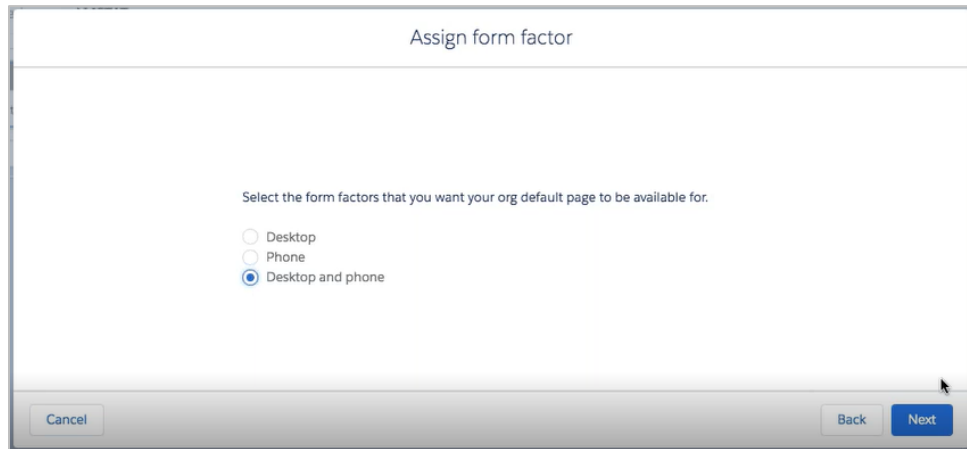
Click the “Save” button on the top right to save these changes. Once you press the Save button, you’ll be prompted to activate the page. Click the Activate button.



The following dialog will show on the screen. In this example, we will set it to the Org Default.



Assign the form factor by selecting “Desktop and Phone” and clicking Next.



Assign form factor

Select the form factors that you want your org default page to be available for.

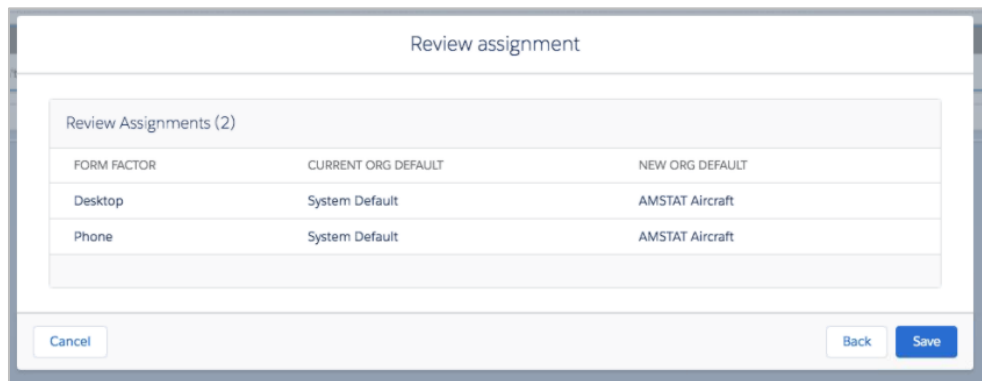
☐ Desktop

☐ Phone

☒ Desktop and phone

Cancel Back Next

Review the assignment and click the “Save” button.



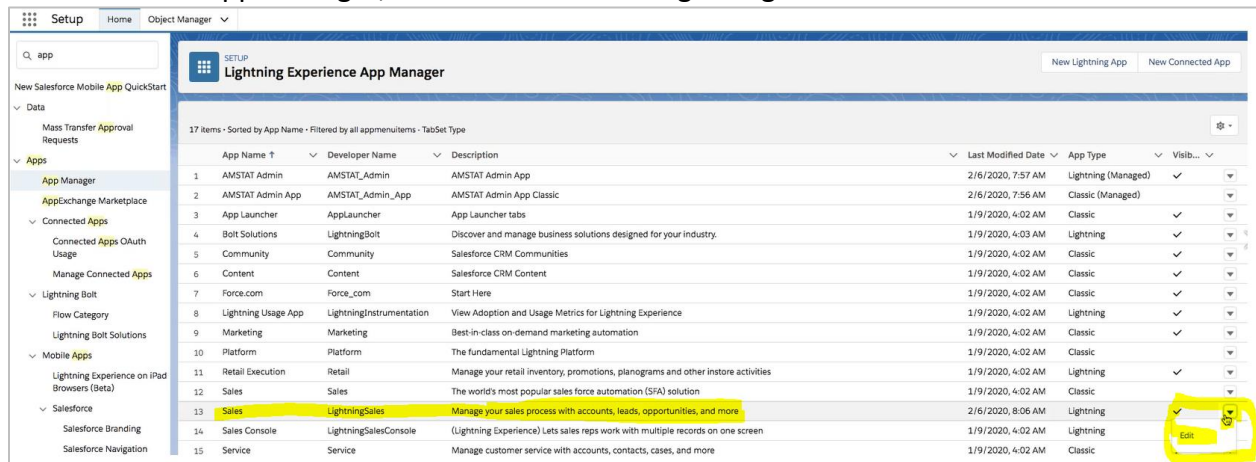
Review assignment

Review Assignments (2)

FORM FACTOR	CURRENT ORG DEFAULT	NEW ORG DEFAULT
Desktop	System Default	AMSTAT Aircraft
Phone	System Default	AMSTAT Aircraft

Cancel Back Save

Go back to the App Manager, and click Edit under LightningSales.



Setup Home Object Manager

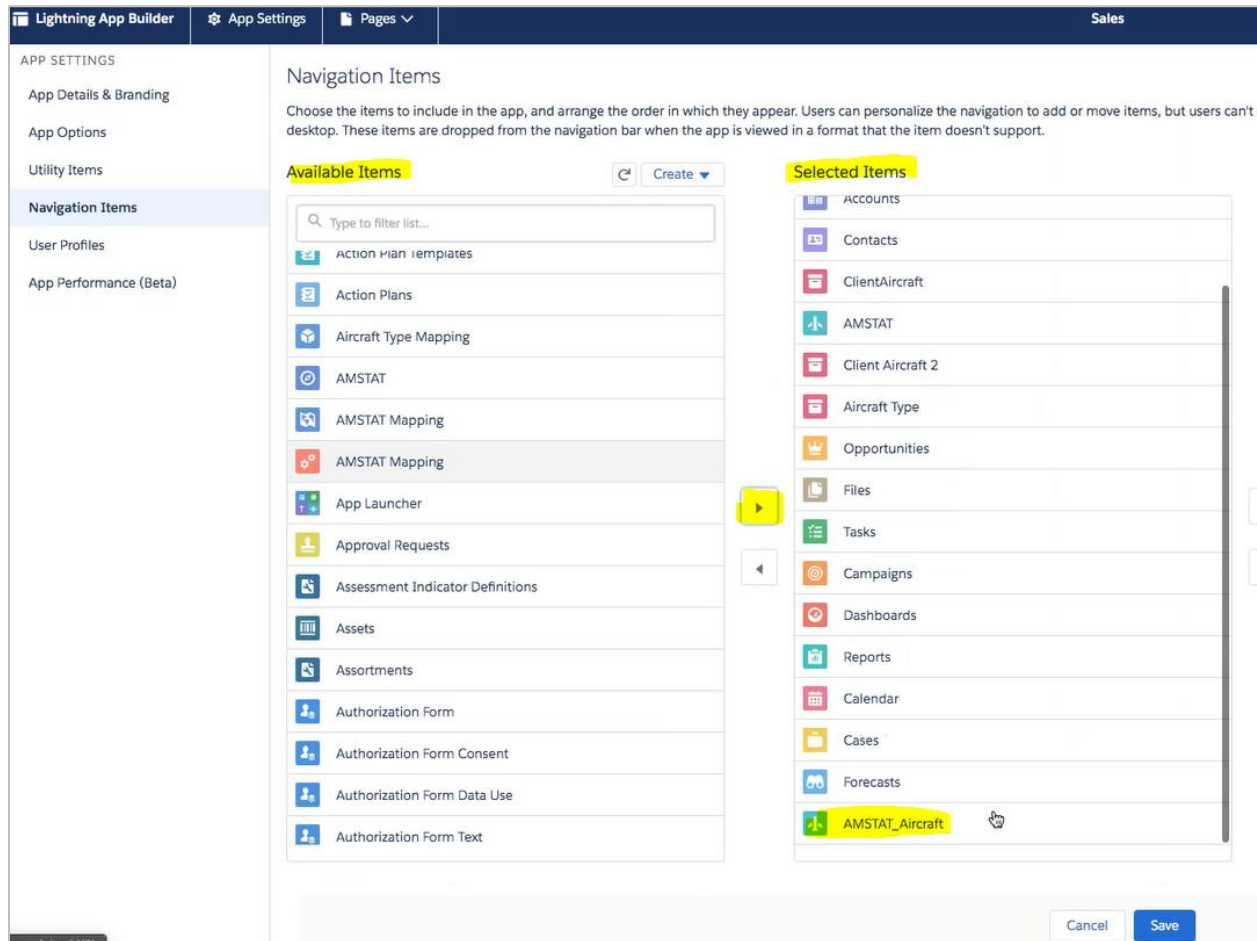
Lightning Experience App Manager

17 items - Sorted by App Name - Filtered by all appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visible
1 AMSTAT Admin	AMSTAT_Admin	AMSTAT Admin App	2/6/2020, 7:57 AM	Lightning (Managed)	✓
2 AMSTAT Admin App	AMSTAT_Admin_App	AMSTAT Admin App Classic	2/6/2020, 7:56 AM	Classic (Managed)	✓
3 App Launcher	AppLauncher	App Launcher tabs	1/9/2020, 4:02 AM	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/9/2020, 4:03 AM	Lightning	✓
5 Community	Community	Salesforce CRM Communities	1/9/2020, 4:02 AM	Classic	✓
6 Content	Content	Salesforce CRM Content	1/9/2020, 4:02 AM	Classic	✓
7 Force.com	Force_com	Start Here	1/9/2020, 4:02 AM	Classic	✓
8 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	1/9/2020, 4:02 AM	Lightning	✓
9 Marketing	Marketing	Best-in-class on-demand marketing automation	1/9/2020, 4:02 AM	Classic	✓
10 Platform	Platform	The fundamental Lightning Platform	1/9/2020, 4:02 AM	Classic	✓
11 Retail Execution	Retail	Manage your retail inventory, promotions, planograms and other in-store activities	1/9/2020, 4:02 AM	Lightning	✓
12 Sales	Sales	The world's most popular sales force automation (SFA) solution	1/9/2020, 4:02 AM	Classic	✓
13 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	2/6/2020, 8:06 AM	Lightning	✓
14 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	1/9/2020, 4:02 AM	Lightning	✓
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	1/9/2020, 4:02 AM	Classic	✓

LightningSales Edit

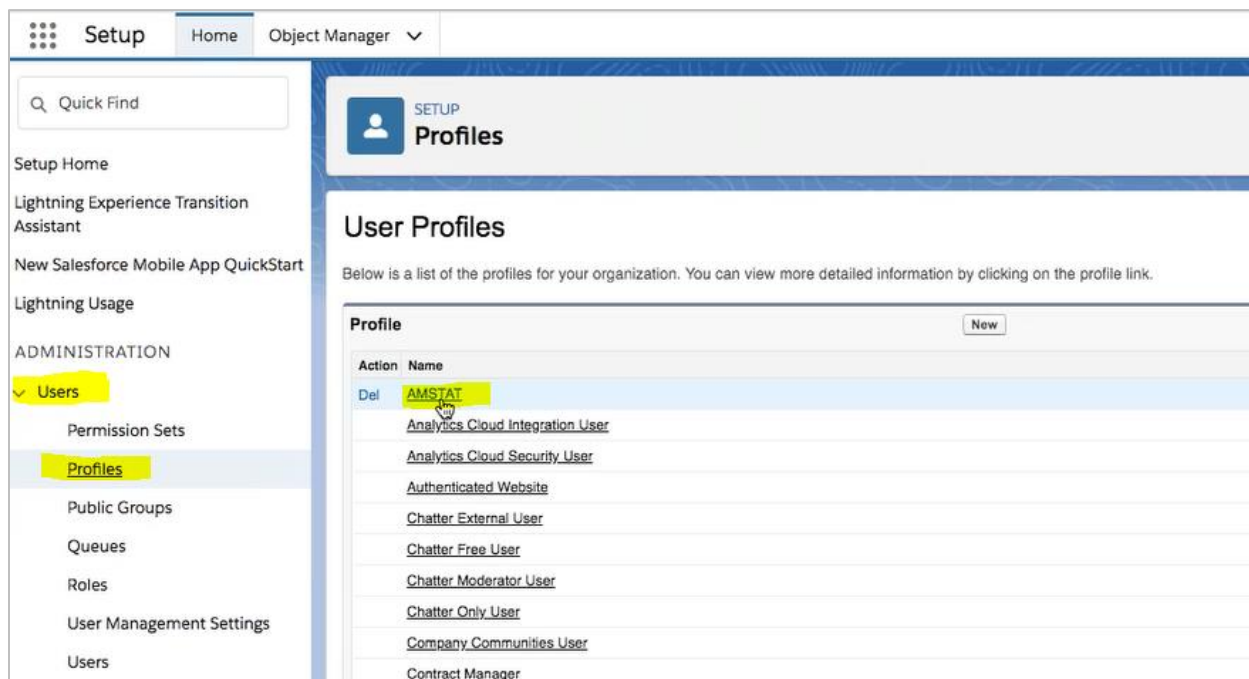
Go to Navigation Items, select “AMSTAT_Aircraft” from the Available Items list, and click on the arrow to add it to the list of Selected Items. Use the up and down buttons to move it to the desired location.



In order for users to see this object we need to give permissions to users to access this aircraft.

Under Administration, go to Users and select Profiles. Select the profile used by your user base. In this example, the users are all under the AMSTAT profile.

Note: You may need to repeat this step for each profile if your users are under multiple profiles.



Setup Home Object Manager

Quick Find

Setup Home

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

ADMINISTRATION

Users

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

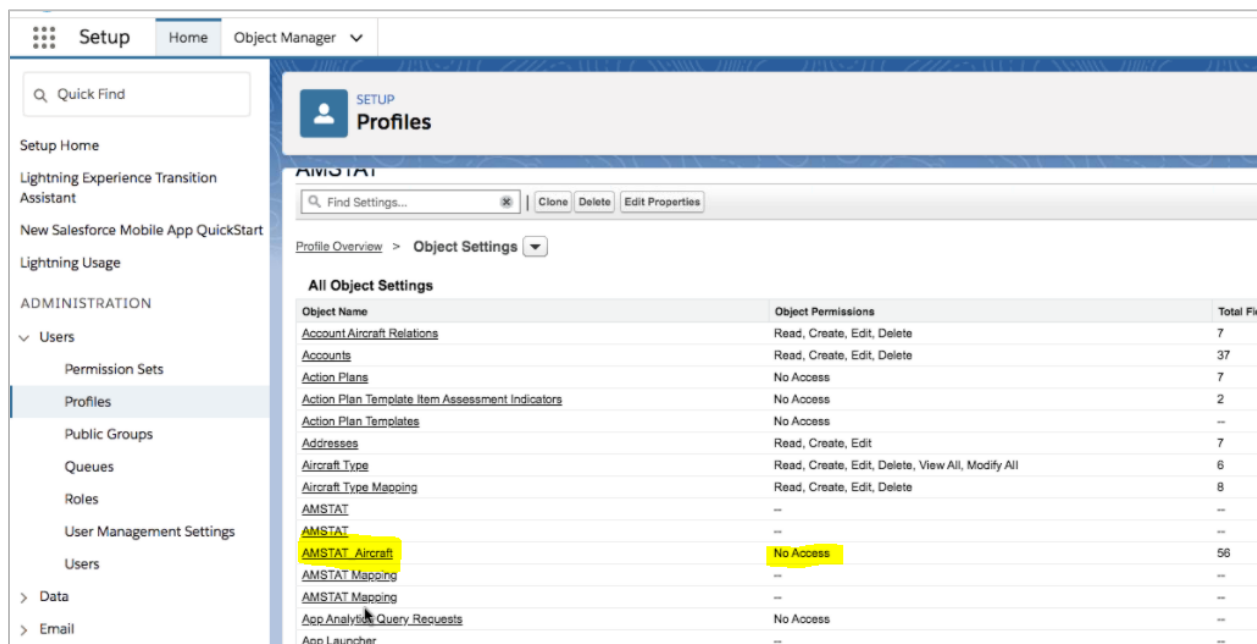
SETUP Profiles

User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Action	Name
Del	AMSTAT
	Analytics Cloud Integration User
	Analytics Cloud Security User
	Authenticated Website
	Chatter External User
	Chatter Free User
	Chatter Moderator User
	Chatter Only User
	Company Communities User
	Contract Manager

Click on “Object Settings”. You will see that this profile has no access to the AMSTAT_Aircraft.



SETUP Profiles

AMSTAT

Find Settings... Clone Delete Edit Properties

Profile Overview > Object Settings

All Object Settings

Object Name	Object Permissions	Total Fk
Account Aircraft Relations	Read, Create, Edit, Delete	7
Accounts	Read, Create, Edit, Delete	37
Action Plans	No Access	7
Action Plan Template Item Assessment Indicators	No Access	2
Action Plan Templates	No Access	--
Addresses	Read, Create, Edit	7
Aircraft Type	Read, Create, Edit, Delete, View All, Modify All	6
Aircraft Type Mapping	Read, Create, Edit, Delete	8
AMSTAT	--	--
AMSTAT_Aircraft	No Access	56
AMSTAT Mapping	--	--
AMSTAT Mapping	--	--
App Analytics Query Requests	No Access	--
App Launcher	--	--

Click on AMSTAT_Aircraft and then the “Edit” button.

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is highlighted. The main content area shows the 'AMSTAT' profile selected. Under 'Object Settings', 'AMSTAT_Aircraft' is chosen. The 'Edit' button is highlighted in yellow.

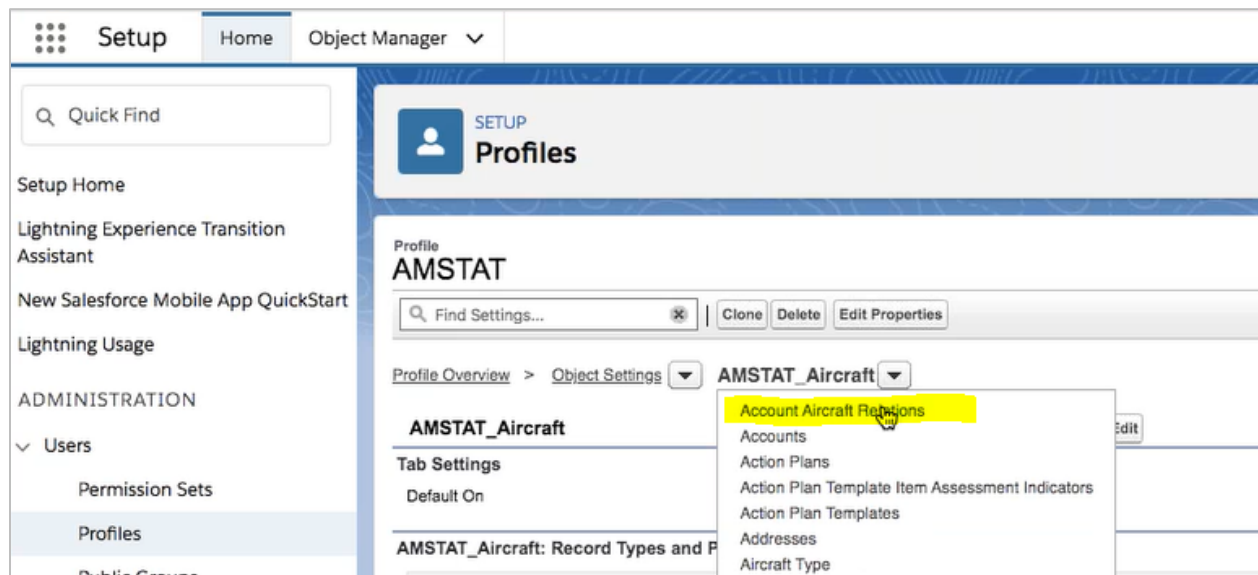
Change the Tab Settings to “Default On”, change the Object Permissions to “Modify All”, and check all the boxes to enable “Edit Access” under Field Permissions. Click Save.

The screenshot shows the Salesforce Setup interface for the 'AMSTAT' profile. The 'AMSTAT_Aircraft' object settings are shown. The 'Tab Settings' are set to 'Default On'. The 'Object Permissions' table shows 'Modify All' checked. The 'Field Permissions' table shows 'Edit Access' checked for all fields.

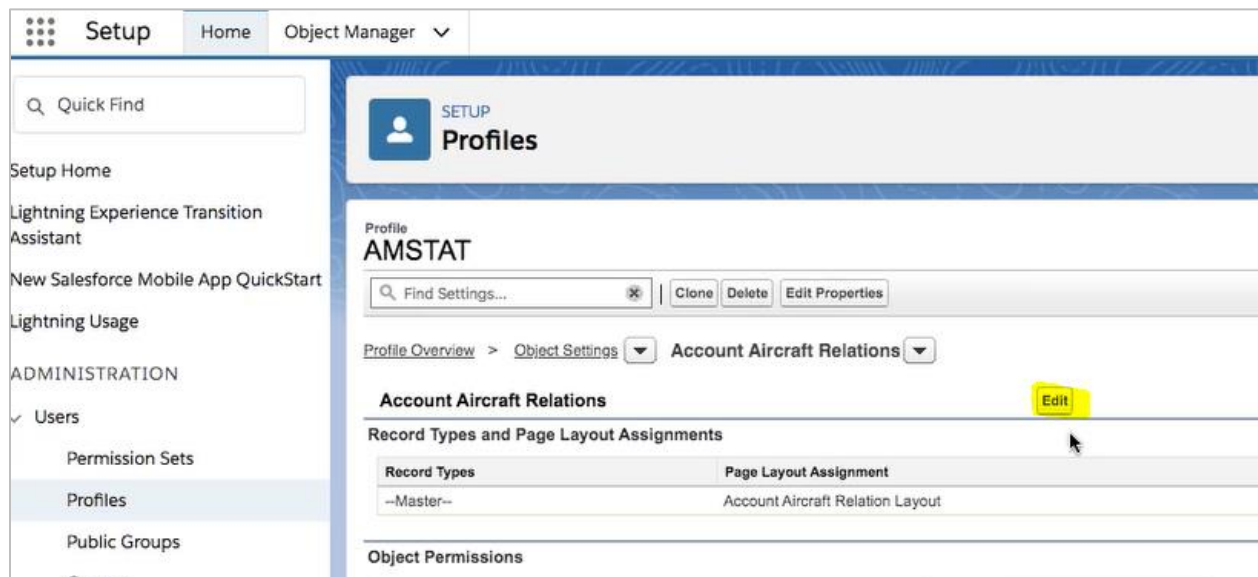
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Name	Read Access	Edit Access
ADS-B Compliance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aircraft ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Airport Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
APU Maintenance Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Apu Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Asking Price(Text)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Asking Price(Value)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select Account Aircraft Relations from the dropdown.



Click the “Edit” button.



Under Object Permissions, check the boxes for View All and Modify All. Under Field Permissions, check the box for Edit Access for the Aircraft row. Click the Save button.

Setup | Home | Object Manager ▾

Quick Find

Setup Home
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage

ADMINISTRATION

- Users
 - Permission Sets
 - Profiles**
 - Public Groups
 - Queues
 - Roles
 - User Management Settings
 - Users
- > Data
- > Email

PLATFORM TOOLS

- Apps
 - App Manager
 - AppExchange Marketplace

SETUP Profiles

Profile: **AMSTAT**

Find Settings... | Clone | Delete | Edit Properties

Profile Overview > Object Settings ▾ Account Aircraft Relations ▾

Account Aircraft Relations [Save] [Cancel]

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Account Aircraft Relation Layout ▾

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Read Access	Edit Access
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aircraft	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>

We need to display related information under the accounts. In the Object Manager, select Account and go to Page Layout. Click on Related Lists.

Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER

Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Save | Quick Save | Preview As... | Cancel | Undo | Redo | Layout Properties

Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Visualforce Pages

Quick Find: Related List Name

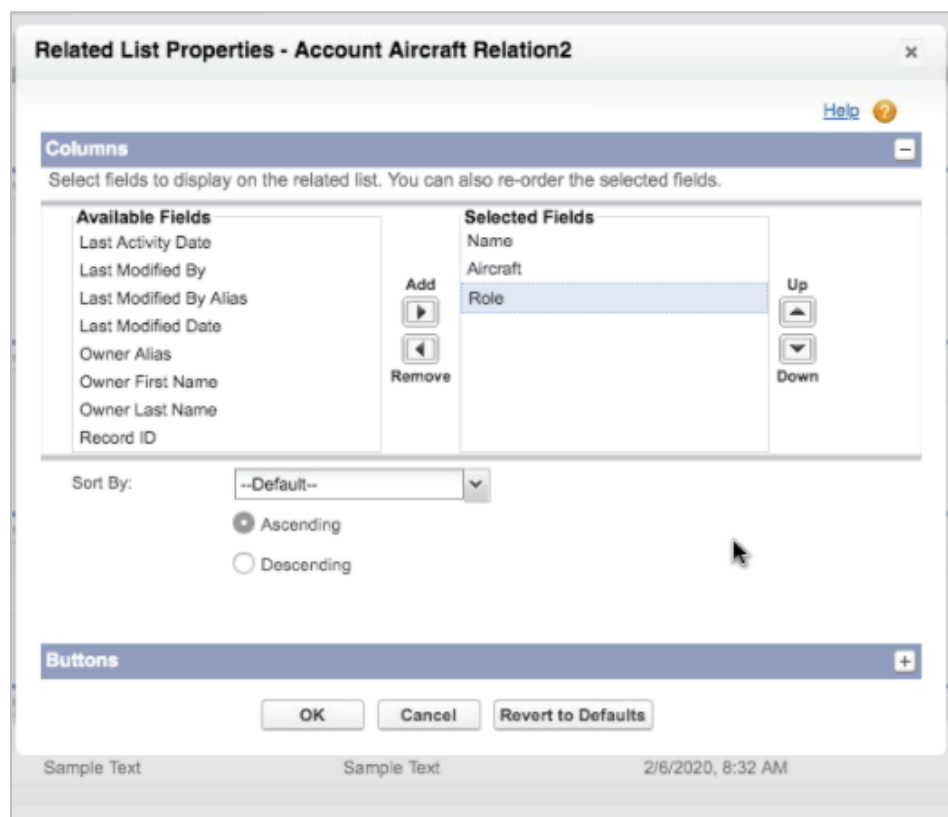
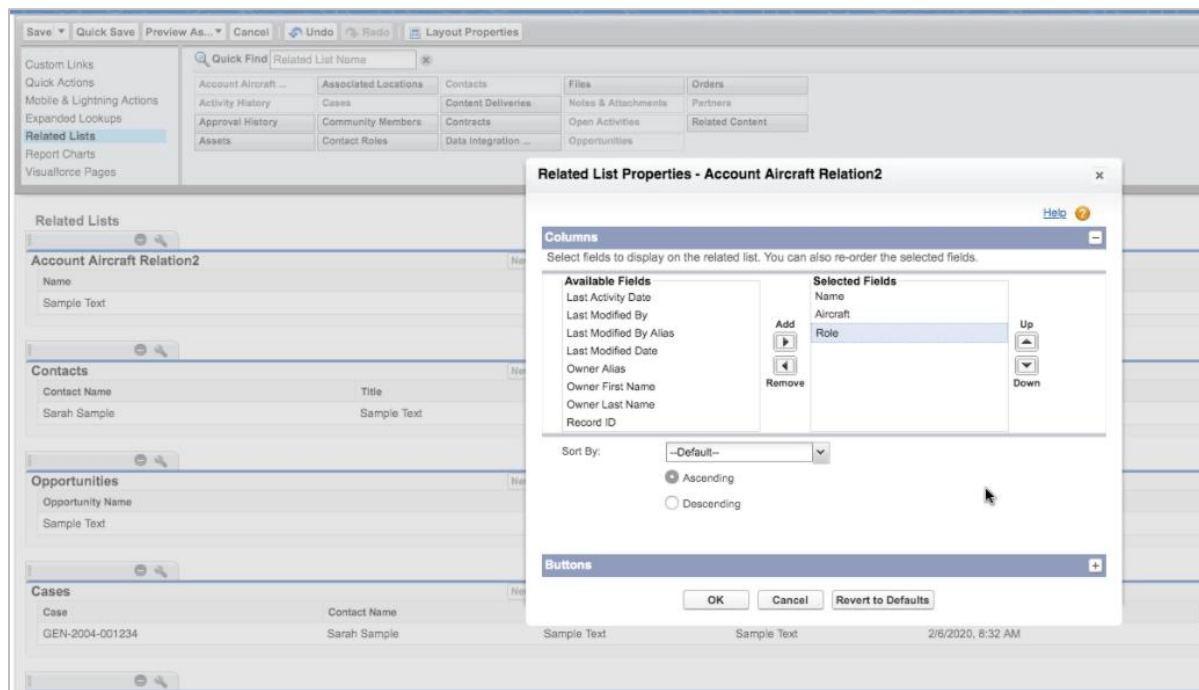
Account Aircraft...	Associated Locations	Contacts	Files	Orders
Activity History	Cases	Content Deliveries	Miles & Attachments	Partners
Approval History	Community Members	Contracts	Open Activities	Related Content
Assets	Contact Roles	Data Integration ...	Discontinues	

Related Lists

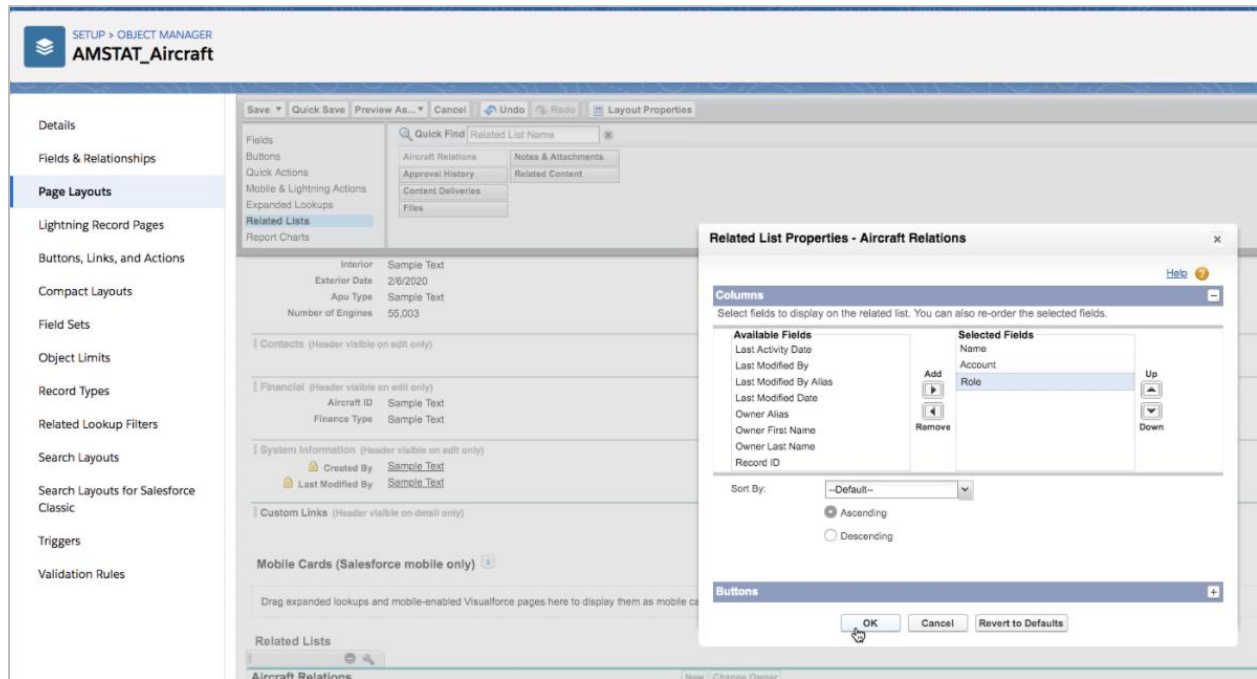
Contacts [New: Merge Contacts] [Add to Campaign]

Contact Name	Title	Email
Sarah Sample	Sample Title	sarah.sample@company.com

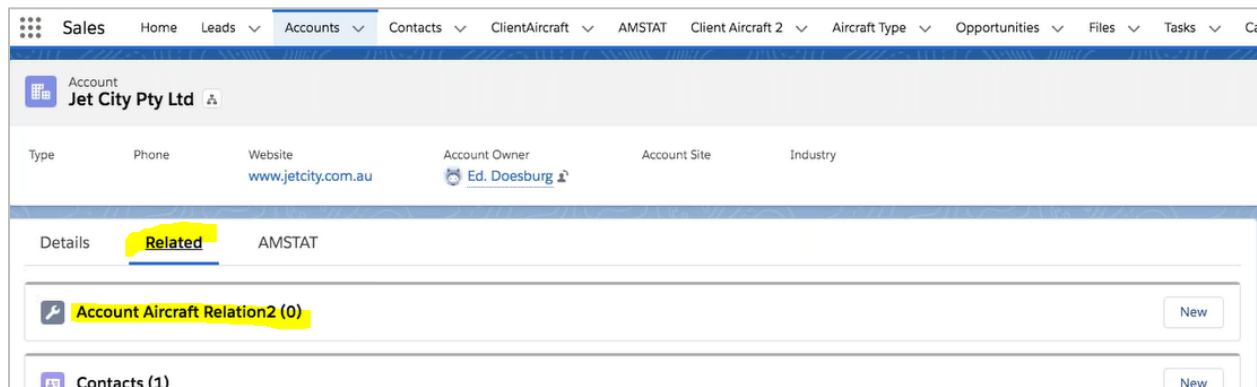
Drag the “Account Aircraft” item down to the Related Lists section. Since the default is only one field, edit the Selected Fields list to provide additional fields such as Aircraft and Role.



Repeat these steps for the AMSTAT Aircraft.

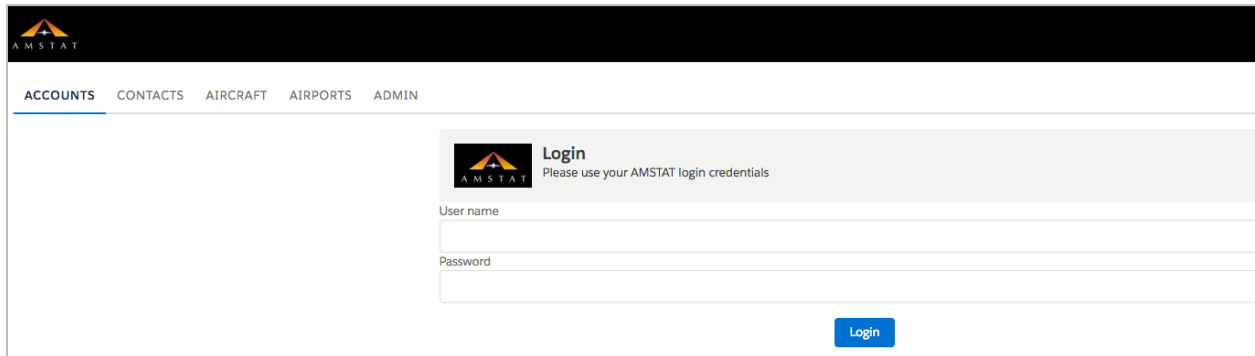


When viewing a record in the Sales App, you will now see the Account Relations Tab.



Start using the AMSTAT App

On any of the added AMSTAT components, you will see an AMSTAT login screen



The screenshot shows the AMSTAT login interface. At the top, there is a black header with the AMSTAT logo on the left. Below the header is a navigation bar with the following links: **ACCOUNTS**, CONTACTS, AIRCRAFT, AIRPORTS, and ADMIN. The **ACCOUNTS** link is underlined. The main content area is white and contains a login box on the right side. The login box has a grey header with the AMSTAT logo and the text "Login" and "Please use your AMSTAT login credentials". Below the header are two input fields: "User name" and "Password". At the bottom right of the login box is a blue button labeled "Login".

Login with the AMSTAT provided login credentials to activate your subscription.

When logged in successfully, the login page will be replaced by the AMSTAT component of the page you have selected.

At this point the AMSTAT App is ready for use. Note: if there are multiple users that have access to AMSTAT, each user must login individually with their own AMSTAT credentials to activate their Account.

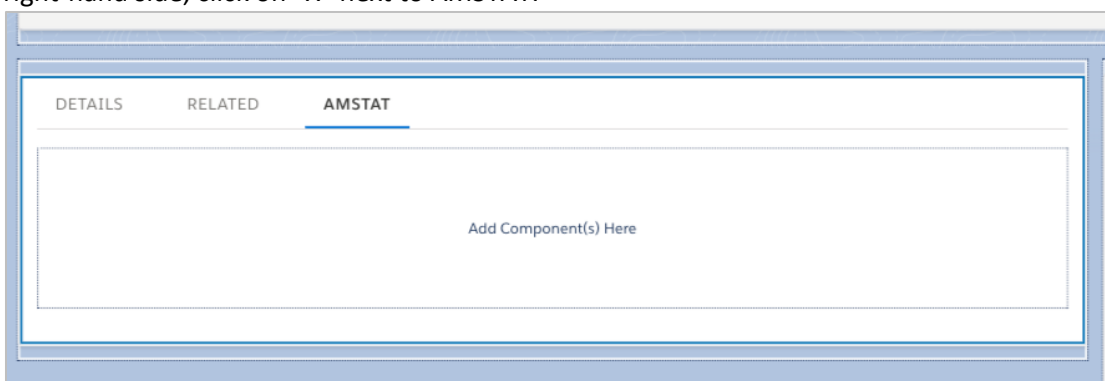
Uninstalling AMSTAT for Salesforce® (Lightning Version)

To uninstall the AMSTAT app, follow the following described in the following sections


Uninstalling AMSTAT for Salesforce® from Lightning Version

For all the lightning pages that were set up in the installation, you need to remove the AMSTAT Components:

- Go to the Set Up / Object Manager
- Select the Object the AMSTAT component was installed for:
 - Account
 - Contact
 - Lead
- Select the Lightning Record Pages
- Click on the component and click on Edit
- Remove the AMSTAT component from the page by clicking on the AMSTAT page layout. On the right-hand side, click on “X” next to AMSTAT.



- Save the Lightning page
- Repeat for all the other objects
- Unassign the AMSTAT Admin and AMSTAT App permission set.
- Go to Set up / Home / Installed Packages
- Uninstall the AMSTAT App

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	
Uninstall	 AMSTAT App	AMSTAT	1.4 (Beta 18)	amstat	2/6/2018 6:15 AM	✓	1	7	4	
Description AMSTAT Sync App										

- Configure the uninstall:

Custom Object Data

Custom Object	Records (Approximate)
Subscriptions	3
Setting	2
Mapping	2
Linking	66

☐ Save a copy of this package's data for 48 hours after uninstall

☒ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

- Press Uninstall
- You will receive an email when the uninstall is complete