

# AMSTAT for Salesforce<sup>®</sup> Version 3.1 – Upgrade Install

INSTALLATION GUIDE FOR SALESFORCE<sup>®</sup> LIGHTNING VERSION – UPGRADING FROM AMSTAT FOR SALESFORCE<sup>®</sup> VERSION 2

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# Who Is This Guide For?

This manual was created for Salesforce<sup>®</sup> administrators and those familiar with installing Salesforce<sup>®</sup> 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<sup>®</sup> application from Version 2 to Version 3 in a Salesforce<sup>®</sup> Lightning environment. Other guides are available for the following scenarios:

- New Installation of AMSTAT for Salesforce Version 3 in a Salesforce<sup>®</sup> Lightning environment.
- New installation of AMSTAT for Salesforce Version 3 in a Salesforce<sup>®</sup> 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<sup>®</sup>, please do not hesitate to contact us via phone (US) 530-6400 x102 or <u>service@amstatcorp.com</u>.

## Before You Start

There are certain prerequisites in order to install AMSTAT for Salesforce<sup>®</sup>.

- 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<sup>®</sup> user must have an AMSTAT Premier account.
  - Note that AMSTAT Connect Plus is not currently supported for Salesforce<sup>®</sup> integration.
- Salesforce<sup>®</sup> 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

- If you install AMSTAT for Salesforce<sup>®</sup> in your **Production** environment, then the AMSTAT data used in the app is the <u>same data that you see in your AMSTAT Premier subscription</u> (i.e. they are both updated on the safe frequency). In addition, your AMSTAT Saved Searches will appear in your instance of AMSTAT for Salesforce<sup>®</sup>.
- If you install AMSTAT for Salesforce<sup>®</sup> 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<sup>®</sup> allows you to install the elements that make up the AMSTAT for Salesforce<sup>®</sup> App in various locations. By following these instructions, the below will be the resulting view for users and is the recommended AMSTAT for Salesforce<sup>®</sup> setup:

• The Salesforce<sup>®</sup> 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);

Sales	Home Opportuniti	les 🗸 Leads 🗸 T	asks 🗸 Files 🗸 Accounts
Account 3M Co	ompany 👗	<u></u>	
Type	Phone 651-733-1110	Website www.3m.com	Account Owner
Prospect			<u> </u>

• 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.

ke	Model	Year	Serial Number
fstream	G200	2005	
Details	AMSTAT		
L			
	1.0		

• 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.

All 👻 🔍 Search AMSTAT_Aird	craft and more
Sales Home Leads V Accounts V Contacts V ClientAircraft V Aircraft Type V Clie	ent Aircraft 2 🗸 Opportunities 🗸
AMSTAT_Aircraft 2007 Bombardier Challenger 300 20115 N57HA	
Details Related AMSTAT Name 2007 Bombardier Challenger 300 20115 N57HA	Owner
Make Bombardier	Model Model
Serial Number 20115	Registration Number
For Sale Status For Sale	Lien Status
Asking Price(Text)	Asking Price(Value)

## AMSTAT for Salesforce® Installation Package

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

1. Go to appexchange.com, search for AMSTAT or go to: https://appexchange.Salesforce.com/appxListingDetail?listingId=a0N3A00000EwBaEUAV



- 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 Confirm and Install
- 5. Follow the instructions below.

2. Click on

# AMSTAT for Salesforce<sup>®</sup> Installation for Lightning Version – Upgrading from AMSTAT for Salesforce<sup>®</sup> Version 2.0

These steps are for users who are upgrading their current AMSTAT for Salesforce<sup>®</sup> instance from Version 2.0 to Version 3.0, and are using the Lightning version of Salesforce<sup>®</sup>. 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.

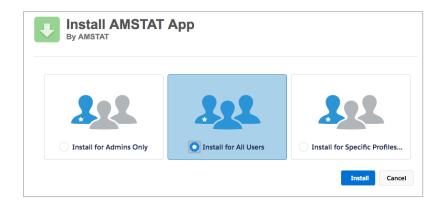
#### Assumptions

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<sup>®</sup> to specific users. We suggest you use 'Install for All Users' (all Salesforce<sup>®</sup> users have access to AMSTAT for Salesforce<sup>®</sup>), 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.



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

By AMS	all AMSTAT App TAT		
	🌟 Installing ar	nd granting access to a	III Users
App Name	Publisher	Version Name	Version Number
App Name AMSTAT App			

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.

Install AMSTAT App By AMSTAT	
Installation Complete!	
	Done

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

Packages				17
ages				
wse, test drive, downloa	ad, and install pre-built a	apps and components right into	your salesforce	.co
	custom apps, tabs, and	custom objects are initially ma	arked as "In Dev	elop
o an installed package, y	ou can take different ac	ctions from this page.		
ninstall. To manage you	ır package licenses, clic	k Manage Licenses.		
me Publisher	Version Number	Namespace Prefix	Status	4
AMSTAT	3,1.1	AMSTATCORP	Active	ι
	talled in packages. Any p by clicking Deploy. o an installed package, y ninstall. To manage you me Publisher	AGES wwse, test drive, download, and install pre-built a stalled in packages. Any custom apps, tabs, and p by clicking Deploy. to an installed package, you can take different ac ninstall. To manage your package licenses, clicenses, clice	AGES wwse, test drive, download, and install pre-built apps and components right into stalled in packages. Any custom apps, tabs, and custom objects are initially ma- p by clicking Deploy. to an installed package, you can take different actions from this page. ninstall. To manage your package licenses, click Manage Licenses. <u>me Publisher Version Number Namespace Prefix</u> <u>AMSTAT 3,1.1</u> AMSTATCORP	AGES wwse, test drive, download, and install pre-built apps and components right into your salesforce stalled in packages. Any custom apps, tabs, and custom objects are initially marked as "In Deve p by clicking Deploy. to an installed package, you can take different actions from this page. ninstall. To manage your package licenses, click Manage Licenses. <u>me Publisher Version Number Namespace Prefix Status</u> <u>AMSTAT 3.1.1</u> 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.

Setup Home Obj	ect Manager 🗸	
SETUP > OBJECT MANAGER ClientAircraft		
Details	Details	
Fields & Relationships Page Layouts	Description	
Lightning Record Pages	API Name ClientAircraftc	Enable Reports
Buttons, Links, and Actions Compact Layouts	Custom	Track Activities
Field Sets	Singular Label ClientAircraft	Track Field History
Object Limits	Plural Label ClientAircraft	Deployment Status Deployed
Record Types Related Lookup Filters		Help Settings Standard salesforce.com Help Window
Search Layouts		
Search Layouts for Salesforce Classic		
Triggers		
Validation Rules		

Go to the Lightning Page and click on Edit.

Setup Home O	bject Manager 🗸			
NSTR CHIES WELL	ANAMA JURIC - JEASSAFT	11115-1113	1.7 NYMA 111	NUT - THASSENIC FILLES AND DE
SETUP > OBJECT MANAGE ClientAircraft	ER			
- 11 - 13 - 14 - 14 - 14 - 14 - 14 - 14			NN 111-1	
Details	Client_Aircraft			
Fields & Relationships	Lightning Page Detail			Edit Clone Delete
Page Layouts	▼ Information			
			Client_Aircraft	
Lightning Record Pages		Description		Edit Cione Delete
Buttons, Links, and Actions				Edit Clone Delete
Compact Layouts	Assignments By App			
Field Sets	No Assignments to display			

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

🖬 Lightning App Builder	📔 Pages 🗸						Client Aircraft			← Ba	:k ? Help
50 % 0		Desktop	Shrink To View	•	C <sup>4</sup> Refresh					Save	Activation
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		-							Tabs		
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Action Plans List - Finan		Details	Related Details					+ =			
Actions & Recommenda	ations								Related		×
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Flow		Cessna Model					0419 Registration Number		Hou nuo		
Highlights Panel		Citation CJ2+ !	525A				N785MT	×	✓ Set Component	nt Visibility	
List View		Year					Status	8	Filters		
>> Path									+ Add Filter		
Quip		Is Fractional					Airport Code				

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

Lightning App Builder 🌓 Pages 🗸					Client Aircraft			
E E X 5 €	🖵 Desktop 🔻	Shrink To View 🔻	C <sup>4</sup> Refresh					
ghtning Components	ClientAircraft	INSTATE		nws91(	(NGC)SUM			
	ClientAlPerate Cessna Citation	CJ2+ 525A 0419 N785	5MT				Edit Delete	Clone 👻
Q. Search components 🕸 🔹	Make Model Cessna Citation C	Year CJ2+ 525A	Serial Number 0419	Registration Number N785MT	For Sale Status			
<ul> <li>Standard (25)</li> </ul>	-							
Accordion				0				
Action Plans List - Financial Servi	Details Related	Details		· ·				+ 6
E Actions & Recommendations								
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	ClientAircraft			0	Owner			
Activities	ClientAircraft Cessna Citation CJ2+ 5	25A 0419 N785MT		•	Owner	Tab Label		
Activities Einstein Next Best Action	Cessna Citation CJ2+ 5. Make	25A 0419 N785MT		· · ·	Ed. Doesburg Serial Number	Custom		:
<ul> <li>Activities</li> <li>Einstein Next Best Action</li> <li>Event Insights</li> </ul>	Cessna Citation CJ2+ 5 Make Cessna	25A 0419 N785MT		<u>×</u>	C Ed. Doesburg Serial Number 0419			\$
Activities  Einstein Next Best Action  Kevent Insights Flow	Cessna Citation CJ2+ 5. Make Cessna Model	25A 0419 N785MT			Ed. Doesburg Serial Number 0419 Registration Number	Custom		:
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Activities Enstein Next Best Action Enstein Next Best Action Enstein Seat Best Flow Highlights Panel List View	Cessna Citation CJ2+ 5 Make Cessna Model Citation CJ2+ 525A	25A 0419 N785MT			Ed. Doesburg       Serial Number       0419       Registration Number       N785MT	Custom * Custom Label		; Done
Activities	Cessna Citation CJ2+ 5 Make Cessna Model Citation CJ2+ 525A	25A 0419 N785MT		7 7 7 7	Ed. Doesburg       Serial Number       0419       Registration Number       N785MT	Custom * Custom Label		

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.

🖬 Lightning App Builder 📑 Pa	lges ∨			Client Aircraft	
5 2 % 🖬 🗎	Desktop	▼ Shrink To View	▼ C' Refresh		
Lightning Components	ClientAir	craft	10 N785MT	AND ALL AND AL	
Q Search components	章 · Make	Model	Year Serial Number	Registration Number For Sale Status	
Quip Document	Cessna	Citation CJ2+ 525A	0419	N785MT	
Recent Items	Details	Related AMSTAT			
Related List - Single				0	
Related Lists					
Report Chart		7		-0	
Tabs					
<ul><li># Topics</li><li>Trending Topics</li></ul>					
Visualforce					
✓ Custom (0) No components available.					
AMSTAT_Account					
AMSTAT_Aircraft					
Quip Document         Quip Notifications         Quip Notifications         Recent Items         Record Detail         Related List - Single         Related List Quick Links         Related Record         Report Chart         Rich Text         Tabs         Topics         Trending Topics         Visualforce         Visualforce         Custom (0)         No components available.         Custom - Managed (3)         AMSTAT_Account         AMSTAT_Aircraft	tật • Make Cessna	Citation CJ2+ 525A	Year Serial Number		

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

	Lightning Expe	rience App Manage	r	-110 V IV-		New Lightning App N	lew Connecte	.d App
iterr	ns • Sorted by App Name • Fi	ltered by all appmenuitems - TabS	et Type					\$
	App Name 🕇 🛛 🗸	Developer Name 🗸 🗸	Description	~	Last Modified Date	✓ Арр Туре	✓ Visib <sup>1</sup>	~
	AMSTAT Admin	AMSTAT_Admin	AMSTAT Admin App		2/6/2020, 7:57 AM	Lightning (Managed)	~	
	AMSTAT Admin App	AMSTAT_Admin_App	AMSTAT Admin App Classic		2/6/2020, 7:56 AM	Classic (Managed)		
	App Launcher	AppLauncher	App Launcher tabs		1/9/2020, 4:02 AM	Classic	~	
	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.		1/9/2020, 4:03 AM	Lightning	~	
	Community	Community	Salesforce CRM Communities		1/9/2020, 4:02 AM	Classic	~	
	Content	Content	Salesforce CRM Content		1/9/2020, 4:02 AM	Classic	~	
	Force.com	Force_com	Start Here		1/9/2020, 4:02 AM	Classic	~	
	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience		1/9/2020, 4:02 AM	Lightning	~	
	Marketing	Marketing	Best-in-class on-demand marketing automation		1/9/2020, 4:02 AM	Classic	~	
0	Platform	Platform	The fundamental Lightning Platform		1/9/2020, 4:02 AM	Classic		
1	Retail Execution	Retail	Manage your retail inventory, promotions, planograms and other instore activities		1/9/2020, 4:02 AM	Lightning	~	
2	Sales	Sales	The world's most popular sales force automation (SFA) solution		1/9/2020, 4:02 AM	Classic		
3	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more		1/28/2020, 6:34 PM	1 Lightning	~	-(
ş.	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen		1/9/2020, 4:02 AM	Lightning	Edit	
5	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	Choos deskte					l in a for	s can personalize the navigation to add or move items, but rmat that the item doesn't support. -ted Items
Navigation Items		Type to filter list					Home
User Profiles App Performance (Beta)	2	Action Plan Templates				*	Leads
	2	Action Plans				Th.	Accounts
	•	Aircraft Type Mapping				53	Contacts
	-	AMSTAT	ASTAT				ClientAircraft
	0	AMSTAT					Client Aircraft 2
	5	AMSTAT Mapping	ŝ				Aircraft Type
	00	AMSTAT Mapping			5	¥	Opportunities
		App Launcher			Ľ	۲	Files
		Approval Requests				Ϋ́Ξ	Tasks
						0	Campaigns

Available Items		Selected Items	
Q Type to filter list		Home	
2 Action Plan Templates		★ Leads	
Z Action Plans		En Accounts	
Aircraft Type Mapping		E3 Contacts	
Ø AMSTAT		ClientAircraft	
MSTAT Mapping			
AMSTAT Mapping		Client Aircraft 2	$\neg$
App Launcher	•	Aircraft Type	
Approval Requests	•	Opportunities	•
Assessment Indicator Definitions		Files	
III Assets		Tasks	
S Assortments		Campaigns	
4 Authorization Form		O Dashboards	
4 Authorization Form Consent		Reports	
4 Authorization Form Data Use		Calendar	
		F Caces	
		Cancel	

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

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

Sales Home Leads V Accounts	<ul> <li>Contacts V ClientAircraft</li> </ul>	All ▼     Q     Search Salesforce       ✓     AMSTAT     Client Aircraft 2 ∨     Aircraft Type ∨     Opportunities ∨     Files ∨     Tasks ∨
AMSTAT		
Dashboard Accounts Contacts Aircraft Airc	ports	
		Login Please use your AMSTAT login credentials
	A M S T A T	
	Password	
		Login

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"

	AMSTAT Admin	AMSTAT Mapping	Aircraft Type Mapping	~	Linking 🗸	All	Ŧ	Q	Search Salesforce
A M S	TAT	AVAILLE JUILLE	- 1   352 e 3   3 = 7 11			N. Hund		- 715	
۶	AMSTAT Mappir	ng							
	MAPPING		Aircraft						
	Contact			ject fr	om AMSTAT Packag	10			ing Aircraft Object?
	Aircraft		Map existing object	t 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.

MSTAT Admin	AMSTAT Mapping	Aircraft Type Mapping 🗸	Linking	V	
T					
MSTAT Mappir	Jg				
		Aircraft			
Contact		Select type of the Object I	Model		
Lead		(h)			
Aircraft		manufation and the second	ect	Multi Object	
		Single Object		Multi Object Mapping will be on 2 Objects	
	MSTAT Mappir PPING Account Contact Lead	MSTAT Mapping PPING Account Contact Lead	MSTAT Mapping PPING Account Contact Lead Aircraft Select type of the Object Single Object	PPING Account Contact Lead Aircraft	MSTAT Mapping PPING Account Contact Lead Aircraft Select type of the Object Model Single Object Multi Object

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

A M S T A T	
MISTAT Mapping	
MAPPING	Aircraft
Contact	
🚼 Lead	Select Aircraft Object
Aircraft	Filter names
	٩
	Account Aircraft Relation
	Aircraft Type
	Aircraft Type Mapping
	Client Aircraft 2
	ClientAircraft

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

M.S.T.A.T		All 🔻	Q Search Salesforce				*	• 🖬 ? 🌣
AMSTAT Admin AMSTAT Map	ping Aircraft Type Mapping 🗸 Linking	~						
MSTAT				anna stilliate		e i 7 - Xexiii Connar		
AMSTAT Mapping								
MAPPING  Account	Aircraft							Save Reset
Contact	General		Aircraft details		Contacts		Financial	
🔁 Lead	Name O		Engine 1 Serial Number		Operator		Finance Provider	
🚹 Aircraft	None	÷ .	None	\$	None	:	None	
	• Make O	4	Engine 2 Serial Number		Owner		Finance Type	
	None	\$	None	\$	None	\$	None	
	• Model		Engine 3 Serial Number		Management		Finance Start Date	
	None	\$	None	\$	None	:	None	
	Year O		Engine 4 Serial Number		Broker Dealer		AMSTAT Aircraft ID	
	None	;	None	\$	None	\$	None	
	Serial Number		Maintenance Program		Charter			
	None	\$	None	\$	None	\$		
	Registration Number		Engine Program		Broker			
	None	\$	None	\$	None	:		
	For Sale Status		Engine Make / Model					
	None	\$	None	\$				

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

<u>л м s</u>	AMSTAT Admin	AMSTAT Mapping	Aircraft Type Mapping 🗸	Linking $\checkmark$	All 👻
▲ ^ >> /	AMSTAT Mappir	ng		SUBT A	
	MAPPING		Aircraft		
	Contact		General * Name		
			* Make: 0		:

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.

STAT		All 💌	Q Search Salesforce					*• 🖬 ? 🌣	<b>.</b>
AMSTAT Admin AMS	STAT Mapping Aircraft Type Mapping 🗸 Lin	king 🤝 🔹 Recently Viewe	and $\!$	• M-0001 $ \lor  \times$					
C C C C C C C C C C C C C C C C C C C		STA SMALL HARE	THUS THE THESAULT	7 ANNUA HIGH	THUS THU FILLES	ATTIGA ANYMIC MILLER	- AW-211 - 22	972-5-11177 ANNU	S PIIIIS
TAT									
AMSTAT Mapping									
					¢				
MAPPING	Aircraft							Save Reset	\$
Account	_								-
Contact	General		Aircraft details		Contacts		Financial		
🚼 Lead	* Name O		Engine 1 Serial Number		Operator		Finance Provider		
Aircraft									
	ClientAircraft	÷	None	•	None	:	None		;
	* Make O		Engine 2 Serial Number		Owner		Finance Type		

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

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.

Sales	Aircraft	accounts 🗸	18-2113 - <i>1.111</i> .2	ntAircraft 🧹 AMSTAT	Client Aircraft 2 🗸	Aircraft Type 🗸 🗸	Opportunities 🗸	Files 🗸	Tasks 🗸	Campaigns	<ul> <li>I</li> </ul>
Make Cessna	Model Citation CJ2+ 525A	<b>4 0419 N78</b> Year	Serial Number 0419	Registration Number N785MT	For Sale Status						
Details Cessna Citat	Related AMSTA	<u>r</u>	۹ 🌆	Cessna Citati	on CJ2+ 52	25A 0419	N785MT	Create	Not Linked		
Cessna - Cita	Displaying 1 Aircra		Yea 200			Make Cessna			Model	n CJ2+ 525A	
				gistration Number 85MT		Status Not For Sale			Asking N/A	Price	

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.

	Aircraft error: No Mapping Found	$\mathbf{X}$
r f	For Sale Status	

#### 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.

AMSTAT Admin AMSTAT Ma	apping Aircraft Type Mapping $\lor$ Linking $\lor$			
ZTU ZZUZANCI ANNU Z	MARCE TRANSPORT OF THE AND A CON-	SMALTHREE STRASSING CHEESING A SAMA THREE	- THAN STATE COMESSION AND AND COMPACE AND	
A M S T A T				
AMSTAT Mapping				
MAPPING	Aircraft			Save Reset
Account	A HUNDRE			
Contact	General	Aircraft details	Financial	
😢 Lead	Name	Engine 1 Serial Number	AMSTAT Aircraft ID	
I Aircraft	Name	Engine 1 Serial Number	Aircraft ID	:
	* Make	Engine 2 Serial Number	Finance Provider	
	Make	Engine 2 Serial Number	÷ Finance Provider	:

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

AMSTAT Admin AMSTAT Mapping	Aircraft Type Mapping 🗸 Linking 🧹
AMSTAT	
AMSTAT Mapping	
MAPPING	Aircraft
Contact	*Would you like to use the AMSTAT Aircraft Object or map to your existing Aircraft Object? Import Aircraft object from AMSTAT Package(recommended)
E Lead	R Map existing object from your instance Confirmation
	Your are about to change the object configuration from AMSTAT Imported to a Existing Object. This changes will only apply going forward not for already existing records.
	Okay

Select the Multi Object option.

A M 5 1	T A T				All 🔻 C	Search Salesfo
	AMSTAT Admin	AMSTAT Mapping	Aircraft Type Mapping 🗸 🗸	Linking 🗸		
<u>N~71</u>	( ////////////////////////////////////	AVANNA JUNGOT	1111/5211 ( 7777755	ALLETT NOME	Junit (	$13S \times 11U \times 11U$
A M 3	+ TAT					
1	AMSTAT Mappin	g				
	MAPPING		Aircraft			
	Account					
	Contact		Select type of the Object Mod	lel		
	🚼 Lead					
	🕕 Aircraft					
			Single Objec	t Multi C	Object	
			0 /		2	
			Single Object	NALUSE C	Dhiast	
			Single Object Mapping will be on 1 Object	Multi C t Mapping will be		

Select Client Aircraft2 as the first object.

4	Aircraft
114	Please Select Aircraft Object
Fill	er names
4	2
A	MSTAT_Aircraft
A	ccount Aircraft Relation
A	ircraft Type
A	ircraft Type Mapping
8	Sient Aircraft 2
¢	2lientAircraft
ŀ	inking
5	Aspping

Select Aircraft Type as the second object.

Please Select Aircraft Type Object ter names Q MMSTAT_Aircraft Aircraft Aircraft Nocunt Aircraft Relation Vocunt Type	
Q, MMSTAT_Alicraft Account Alicraft Relation	
MSTAT_Aircraft Account Aircraft Relation	
Account Alexant Relation	
Vicrail: Type	
Vircraft Type Mapping	
DientAircraft	
inking	
Aspping	
ietting (Deprecated)	

AMSTAT Admin	AMSTAT Mapping	Aircraft Type Mapping $\checkmark$ Linking $$				
W. CHESWE	C ANSWELL JURGE	THE THE STREET WITH AND THE	naszne.	CHIL-SALGER NAME HIMLE	THUS-THE COMPOSITION	/ AMMAN /
MSTAT						
🔎 AMSTAT Mapp	ing					
_						
MAPPING		Aircraft				
Account						
Contact		General		Aircraft details		Financia
🔀 Lead		* Name 💿		Engine 1 Serial Number		Finance P
Aircraft		Client Aircraft 2	\$	None	\$	None
		* Serial Number		Engine 2 Serial Number		Finance T
		Serial Number	\$	None	:	None
		* Registration Number		Engine 3 Serial Number		Finance S
		V None		None	\$	None
		Arport Code		Engine 4 Serial Number		AMSTAT A
		Asking Price Cartification	1	None	\$	None
		Certification Date Client Alcoraft 2		Maintenance Program		

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

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.

IL CHIES WELL	ANNA THERE RANGED C	the out of xeams miller - reason of t	THE STREET WANTED MILLER DURAN	111/11/0
	t Relation			
Details	Fields & Relationships 7 Items, Sorted by Field Label			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	C
Page Layouts	Account	AMSTATCORP_Account_c	Lookup(Account)	
Lightning Record Pages	Alexand a		testes (Plant Along 2)	
Buttons, Links, and Actions	Aircraft	Aircraftc	Lookup(Client Aircraft 2)	
Compact Layouts	Created By	CreatedById	Lookup(User)	
Field Sets	Last Modified By	LastModifiedById	Lookup(User)	
Object Limits	Name	Name	Auto Number	
Record Types	Owner	OwnerId	Lookup(User,Group)	
Related Lookup Filters	Role	AMSTATCORPRolec	Picklist	
			<b>5</b>	5°

## Click on the Aircraft object:

Setup Home Ob	oject Manager 🗸	CHREWICT CAMMA MINT - MAASHO	
SETUP > OBJECT MANAGE			
1115 STA			1 50 11 111 5 E
Details	Fields & Relationships 7 Items, Sorted by Field Label		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Account	AMSTATCORPAccountc	Lookup(Account)
ightning Record Pages Buttons, Links, and Actions	Airgaft	Aircraftc	Lookup(Client Aircraft 2)
Compact Layouts	Created By	CreatedById	Lookup(User)

Click on "Set Field Level Security".

Setup Home Obj	ect Manager 🗸	10007 10052111-2227-2111512 XXXXX-100572 120523
SETUP > OBJECT MANAGER		
Account Aircraft	Relation	
Details	Account Aircraft Relation Custom Field	
Fields & Relationships	Back to Account Aircraft Relation	Validation Rules (0)
Page Layouts	Custom Field Definition Detail	Edit Set Figig-Level Security View Field Accessibility Where is this used?
ightning Record Pages	Field Information	
Buttons, Links, and Actions	Field Label Aircraft Field Name Aircraft	

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

Setup Home Obj	ect Manager 🗸	
SETUP > OBJECT MANAGER		
Details	set Field-Loval Security Aircraft	
Fields & Relationships	Save Cancel	
Page Layouts	Field Label Aircraft	
Lightning Record Pages	Data Type Lookup(Client Aircraft 2)	
Buttons, Links, and Actions		
Compact Layouts	Field-Level Security for Profile	Visible
compact agoats	AMSTAT	
Field Sets	Analytics Cloud Integration User	
Object Limits	Analytics Cloud Security User	0
Object clinits	Chatter Only User	0
Record Types	Company Communities User	
Delated Leekup Cilters	Contract Manager	
Related Lookup Filters	Cross Org Data Proxy User	0
Search Lavouts	Custom Marketino Prolie	173

Go back to Accounts.

Setup Home Object Manager V	
SETUP Object Manager 50+ Items, Sorted by Label	ANSANTI ZINATSINGTI ANAMA IMMUT DINASANA ZIN
LABEL	▲ API NAME
Account	Account
Account Aircraft Relation	AMSTATCORP_Account_Aircraft_Relationc
Action Plan	ActionPlan

Click on Page Layout, and add the aircraft again.

	Save * Quick Save Previe	ew As* Cancel	Vindo 🔐 Rado 🔢 🗖	Layout Properties	9 // Coas		A.I.A.		~ ~ ~ ~	
Details	Fields	Q Quick Find Field	Name	x						
Fields & Relationships	Buttons	+ Section	Account Owner	Annual Revenue	D&B Company	Employees		NAICS Code	Parent Account	SIC Code
ricias a riciations rips	Custom Links	* Blank Space	Account Site	Billing Address	Data.com Key	Fax		NAICS Description	Phone	SIC Descr
Page Layouts	Quick Actions	Account Name	Account Source	Created By	Description	Industry		Number of Locations	Rating	SLA.
	Mobile & Lightning Actions	Account Number	Active	Customer Priority	D-U-N-S Number	Last Modifie	d By	Ownership	Shipping Addres	s SLA Explo
Lightning Record Pages	Expanded Lookups Related Lists				Related List Pro	perties - Accour	nt Aircra	ft Relation2		×
Buttons, Links, and Actions										
	0 4									Help 🥹
Compact Layouts	Account Aircraft Relati	ion2		Nat	Columns					-
	Name				Select fields to disp	lay on the related li	st. You can	also re-order the sele	cted fields.	
Field Sets	Sample Text				Available Fields		1	Selected Fields	1	
Object Limits					Created By			Name		
object clinics	1 04				Created By Alias		Add	Aircraft		Up
Record Types	Contacts			Net	Created Date Last Activity Date			Role		
	Contact Name		Title		Last Modified By					-
Related Lookup Filters	Sarah Sample		Sample Tex	t	Last Modified By	Allas	Remove			Down
					Last Modified Da	te				
Search Layouts	0 4				Owner Alias					
Search Layouts for Salesforce	Opportunities	1		No	Sort By:	Default		~		
Classic	Opportunity Name			-		Ascending				
	Sample Text									
Hierarchy Columns						O Descending				
Triggers	Cases			100						
Validation Rules	Cases		Contact Name	Nor	Buttons					+

Repeat this for the Client\_Aircraft2 page layout.

SETUP > OBJECT MANAGER Client Aircraft 2				
111 - 12 - 12 - 12 - 12 - 12 - 12 - 12	Save V Quick Save Previe	w As • Cancel	Undo O Redo	E Layout Properties
Details		Q Quick Find Relate		x
ields & Relationships	Fields Buttons	Activity History	Files	
rields & Relationships	Quick Actions	Aircraft Relations	Notes & Attachmen	its
Page Layouts	Mobile & Lightning Actions	Approval History	Open Activities	
inhteling Depend Depen	Expanded Lookups Related Lists	Content Deliveries	Related Content	
ightning Record Pages	Report Charts			
Buttons, Links, and Actions	is Fractional	v		
	Fractional Program	Sample Text		
Compact Layouts	Years In Fleet Lien Status	2.0617 Sample Text		
Field Sets	Transaction Date	2/6/2020		
	Certification	Sample Text		
Object Limits	Certification Date Transaction Code	2/6/2020		
Record Types	Aircraft Type	Sample Text Sample Text		
	50000000000000000000000000000000000000			
Related Lookup Filters	System Information (Head			
Search Layouts	Created by			
	Custom Links (Header vis	ible on detail only)		
Search Layouts for Salesforce				
Classic	Mobile Cards (Salesfo	rce mobile only) 🧾		
Triggers		25.3		
	Drag expanded lookups an	d mobile-enabled Visualfo	orce pages here to dis	play them as mobile cards.
/alidation Rules				
	Related Lists			

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

🖬 Lightning App Builder 🛛 🖺 P	Pages ∨			Client A	ircraft 2	
5 0 % @ 8	C	Desktop    Shrink To View	C Refresh			
ghtning Components		Client Aircraft 2 Bombardier Challenger 300 2000	55 PA-67224		ICASI III ANN ANN ANNS	Edit Delete Clone 👻
Q, Search components	\$ <b>\$</b> *	-	on Number For Sale Status	Asking Price A	irpart Cade	
Quip Document Quip Notifications Recent Items Record Detail		Details Related AMSTAT	MARKAN SERVICE	n an airtean		
Related List - Single     Related List Quick Links		Bombardier Challenger 300 20065 Q	👍 Bombardier (	Challenger 300 20	065 RA-67224 Create	Not Linked
<ul> <li>Related Lists</li> <li>Related Record</li> </ul>		Displaying 1 Aircraft(s) Bombardier - Challenger 300 20065 RA-67224	Year 2005	Make Bombardier	Model Challenger 300	Serial Number 20065
Report Chart		Bombardier - Challenger 300 20005 KA-07224	Registration Number	Status	Asking Price	TTAF
Tabs			RA-67224 Landings	Not For Sale Base Airport	N/A Location	1210 Certification
# Topics			<ul> <li>A set of a set of the set of th</li></ul>		Tyumen, Russia	
			Fractional	Years in Fleet	Fin Lien Status	Last Transaction Date

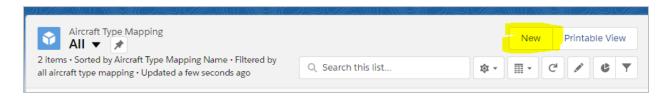
#### Manipulating Aircraft Make and Model Names

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.

App Launcher		Search apps or items	
✓ All Apps			
Sales Manage your sales process with accounts, leads, opportunities, an	and more AMSTAT Admin App		
✓ All Items			
AMSTAT	AMSTAT	AMSTAT Mapping AN	ISTAT Mapping
Accounts	Aircraft Type	Aircraft Type Mapping Ap	proval Requests
Authorization Form	Authorization Form Consent	Authorization Form Data Use Au	thorization Form Text
Campaigns	Cases	Client Aircraft 2 Client	entAircraft

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



Enter the Make and Model as shown in AMSTAT.

Nous Aires	oft Turne Manazina
	aft Type Mapping
Information	
Aircraft Type Mapping Name	<sup>Owner</sup> Kit Tankhiwale
AMSTAT Make	Mapped Make 🚯
AMSTAT Model 🕕	Mapped Model 🕕
	Cancel Save & New Save

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

New Aircraf	t Type Mapping
Information	
Aircraft Type Mapping Name	Owner Kit Tankhiwale
AMSTAT Make 🕚	Mapped Make 🕚
Bombardier	Global
AMSTAT Model 🕕	Mapped Model 🕕
Global 5000	5000
	Cancel Save & New Save

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

Ec
2 (16 917) AN I (11) AN CHI (16 917) AN I
Owner 💽 Kit Tankhiwale
Mapped Make 🚯 Global
Mapped Model 🕦 🔊
Last Modified By State Contemporal Action (1997) State Contemp

### 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.

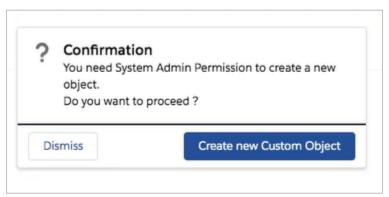
Open the AMSTAT Admin, go to AMSTAT Mapping, and select the option to import the Aircraft Object from the AMSTAT Package.

AMSTAT Admin	MSTAT Mapping 🗸 Aircraft Type Mapping 🗸 Linking 🗸	All 👻 Q. Search Salesforce
AMSTAT	88885 - HIULTZ — A 1885 - A CU - Z 2022 - SANS, ET - NY	
AMSTAT Mapping		
MAPPING	Aircraft	
Contact	* Would you like to use the AMSTAT Aircraft C	Object or map to your existing Aircraft Object?
Ead	Map existing object from your instance	
Andrea		

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.

Confirmation	
eject configuration from AMSTAT Imported to a Exis	ting Object.
Okay	

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.

AMSTAT					
AMSTAT Mapping					
MAPPING	Aircraft				
Contact	Aircraft importing has started.Click o	on <u>Get status</u> or revisit this	page in a few minutes	to see if the import is co	mplete.
🔁 Lead	Chatura				
Aircraft	Object Fields		Success In Progress		

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

SETUP Object Man 50+ Items, Sorted by			
Aircraft Type		Aircraft_Typec	
Aircraft Type Mapping		AMSTATCORPAircraft_Type_Mappingc	A translation make and m translation: AMSTAT - Ma (Global) AMSTAT - Mo MyAircraft
AMSTAT_Aircraft	<b>k</b>	AMSTAT_Aircraftc	
Assessment Indicator Definit	ion	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:

<b>*</b>		Q Search Setup	
Setup Home Ot	ject Manager 🗸		
SETUP > OBJECT MANAGE			
Details	Page Layouts 2 Items, Sorted by Page Layout Name		Q Quick Find
Fields & Relationships	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Page Layouts	AMSTAT_Aircraft Layout	Ed. Doesburg, 2/6/2020, 8:13 AM	Ed. Doesburg, 2/6/2020, 8:13 AM
Lightning Record Pages Buttons, Links, and Actions	AMSTAT_Aircraft_Default Layout	Ed. Doesburg, 2/6/2020, 8:15 AM	Ed. Doesburg, 2/6/2020, 8:15 AM
Compact Layouts			

Click on Page Layout Assignment.

		Q Search Setup		🖬 ? 🌣 🐥 🐻
Setup Home Ob	oject Manager 🗸			
SETUP > OBJECT MANAGER AMSTAT_Aircraf				
Details	Page Layouts 2 Items, Sorted by Page Layout Name		Q. Quick Find	New Page Layout Assignment
Fields & Relationships	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Page Layouts	AMSTAT_Aircraft Layout	Ed. Doesburg, 2/6/2020, 8:13 AM	Ed. Doesburg, 2/6/2020, 8:13 AM	
Lightning Record Pages Buttons, Links, and Actions	AMSTAT_Aircraft_Default Layout	Ed. Doesburg, 2/6/2020, 8:15 AM	Ed. Doesburg, 2/6/2020, 8:15 AM	
Compact Layouts				

For Page Layout to Use, select "AMSTAT\_Aircraft\_Default Layout" and click Save.

SETUP > OBJECT MANAGER			
Details	Edit Page Layout Assignment AMSTAT Aircraft		
Fields & Relationships		profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL	+ click to select multiple cells that are
Page Layouts		Save	
Lightning Record Pages		Page Layout To Us	29 Selected 0 Changed
Buttons, Links, and Actions	Profiles	AMSTAT_MICLAT_Default Ca AMSTAT_Aircraft Layout	Page Layout
Compact Layouts	Chatter External User		AMSTAT_Aircraft Layout
sompact alyouts	Chatter Free User		AMSTAT_Aircraft Layout
ield Sets	Chatter Moderator User		AMSTAT Aircraft Layout
	Chatter Only User		AMSTAT_Aircraft Layout
Object Limits	Company Communities User		AMSTAT_Aircraft Layout
	Contract Manager		AMSTAT Aircraft Lavout

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

MSTAT_Aircraft lack to Custom Object: AMSTAT_Aircraft	
table below shows the page layout assignments for different profiles.	
Edit Assig	nment
rofiles	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 Lavout
Chatter Free User	AMSTAT Aircraft Default Layout
Chatter Moderator User	AMSTAT Aircraft Default Lavout
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

-							_
***	Setup	Home	Objec	t Manager	~		
211	1 11112	SHULF	1 119	WW. 1111	17	TRAS-2111	
	SETUP > C						
≈	AMSTAT_Aircraft						
ς,		377	1 1	11-20	- 2		~
				Lightn	ing	Record Pages	
D	etails			0 Items, S			
Fi	Fields & Relationships		LABEL		OR	DEFA	
Pa	Page Layouts						
	Lightning Record Pages						
B	Buttons, Links, and Actions						
C	ompact Layou	ts					
Fi	ield Sets						
~	biost Limit-						
0	bject Limits						
R	ecord Types						
0		Cite on					

Click on "Lighting Record Pages" on the left side menu.

You will see the following screen:

App Page Home Page	Build a on	ne-page app for Lightning Experie	nce and the mobile app.
Home Page			
Record Page			1, Search Salesharce
		III My Custom App My App Page	THIS DISCRETE AND A DAMAGE
		My App Page	
		oeline by Stage	Recent Items (20)
			Acres Industries - Premium Support Package Account: Acres Industries
	They Ages Pages	•	Chron Dator 1074/2018 Annualt: \$125,088 Dator: Janos DeWar
		1.8M	Liener and Dever
	Piperine by Stope		Type: Custoreel -Direct
			Disturby Technology Deven Jacob DeVille
	Paritie by Stage		Type: Castamer-Direct Phone: 14203305-0005 Industry Technology

Select the Record Page and click Next.

	Create a new Lightning page	
App Page Home Page	Customize Lightning Experience record	pages.
Record Page		Al + C Secol Operative actives.
	Edge SLA Wy Growth Grow	Alizari SEG.000.00 Cipercia liverani Cip2000.00 Cime Das V193/0217 Nata Star

Enter the label "AMSTAT Aircraft" and select "AMSTAT\_Aircraft" in the Object list. Click Next.

	Create a new Lightning page	
	*Label AMSTAT Aircraft *Object AMSTAT_Aircraft Q	
Back		Nev

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 SALE	SFORCE 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	9 9 9 9 9 9 9 9 9 9 9 9	I         I <td< th=""></td<>
Back		Finish

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

	٦
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	

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

🖬 Lightning App Builder 🛛 🖺 Pages 🗸	AMSTAT Aircraft
5 C X 8 8	❑ Desktop         ▼         Shrink To View         ▼         C <sup>e</sup> Refresh
Lightning Components	
Q Search components	Add Component(s) Here
<ul> <li>✓ Standard (23)</li> <li>Accordion</li> <li>Actions &amp; Recommendations</li> <li>☑ Einstein Next Best Action</li> <li>☑ Event Insights</li> <li>☑ Flow</li> <li>☑ Highlights Panel</li> </ul>	Highlights Panel
<ul><li>List View</li><li>Path</li></ul>	

Add the Tabs panel in to the component.

🖬 Lightning App Builder	🗎 Pages 🗸	AMSTAT Aircraft
5 0 % 🖬 📋		🖵 Desktop 🔹 Strink To View 💌 🧭 C <sup>d</sup> Refresh
Lightning Components		No data available
Q Search components	尊、	Highlights Panel doesn't have any data available.
<ul> <li>Event Insights</li> <li>Flow</li> </ul>		Related Details
Highlights Panel		
Path Quip		Add Component(s) Here
<ul> <li>Quip Document</li> <li>Quip Notifications</li> <li>Recent Items</li> </ul>		•
Record Detail		
<ul> <li>Related List Quick Links</li> <li>Related Lists</li> </ul>		
<ul> <li>Related Record</li> <li>Report Chart</li> <li>Rich Text</li> </ul>		
Tabs # Topics		
Trending Topics		

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".

Tab Label		E Details	×
Custom * Custom Label	\$	Add Tab	
AMSTAT		✓ Set Component Visibility	
	Done	Filters	
		+ Add Filter	

Drag Record Details into the Details component.

📅 Lightning App Builder	🎦 Pages 🗸	AMSTAT Aircraft
5 0 % 🖻 🗎		🖵 Desktop 🔻 Shrink To View 💌 🥂 Refresh
Lightning Components		No data available
Q, Search components	窣 -	Highlights Panel doesn't have any data available.
Event Insights		Details Related AMSTAT
Highlights Panel		0
🔲 List View		
>>> Path		
Quip		
Quip Document		•
Quip Notifications		
C Recent Items		
Record Detail		
Related List - Single		
Related List Quick Links	5	

Click the Related tab and drag "Related Lists" into the tab.

🖬 Lightning App Builder	📔 Pages 🗸						AMSTAT Aircraf
5 0 % 8 8		Desktop	•	Shrink To View	•	C <sup>4</sup> Refresh	
Lightning Components		<ol> <li>No data at</li> </ol>	ailable				
Q Search components	愈 -	Highlights Pane	l doesn't have ar	ny data available.			
Event Insights		Details	Related	AMSTAT			
Highlights Panel							
>>> Path			٢				
Quip Document Quip Notifications			Related	Lists			
Recent Items     Record Detail							
Related List - Single							

Click the AMSTAT tab and drag the Custom AMSTAT\_Aircraft object into the tab.

🖬 Lightning App Builder 📑 Pages 🗸	
	Desktop     Shrink To View     C <sup>4</sup> Refresh
Lightning Components	No data available
Q, Search components tật ▼	Highlights Panel doesn't have any data available.
Quip Document	Details figlated AMSTAT
Recent Items     Record Detail	No clate available  AMSTAT_Aincleft doesn't have any state available
Related List - Single     Related List Quick Links	
Related Lists     Related Record	
Report Chart	
Tabs # Topics	
<ul><li>Trending Topics</li><li>Visualforce</li></ul>	
✓ Custom (0)	
No components available.	
<ul> <li>Custom - Managed (3)</li> <li>AMSTAT Account</li> </ul>	
AMSTAT_Account     AMSTAT_Aircraft     AMSTAT_Contact	

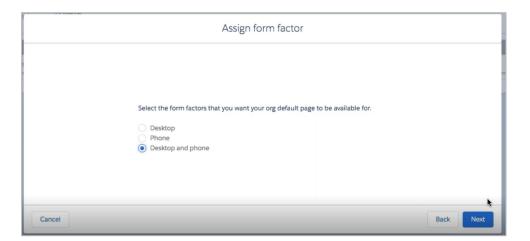
Click the "Save" button on the top right to save these changes. Once you press the Save button, you'll be prompted to activate the page. Click the Activate button.

Page Saved
Activate this page to make it visible to your users. Activate the page now, or do it later using the Activation button in the App Builder toolbar.
Don't show me this message again Not Yet Activate

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

Activation: AMSTAT Aircraft
Custom record pages can be assigned at different levels:
Ithe org default record page displays for an object unless more specific assignments are made.
App default page assignment, if specified, overrides the org default.
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 AMSTAT_Aircraft records, except when app default or app, record type, or profile-specific assignments are defined.
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

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



Review the assignment and click the "Save" button.

	Review assignment						
Review Assignments (2	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.

v Salesforce Mobile App QuickStart		Lightning Exper	ience App Manager			N	ew Lightning App Ne	ew Connected	í App
Data			20 221 211						
Mass Transfer Approval Requests	17 iten	ns • Sorted by App Name • Filt	ered by all appmenuitems - TabSe	Туре					傘 ·
Apps		App Name † $\sim$	Developer Name 🗸 🗸	Description	~	Last Modified Date $ \sim $	Арр Туре	✓ Visib √	,
App Manager	1	AMSTAT Admin	AMSTAT_Admin	AMSTAT Admin App		2/6/2020, 7:57 AM	Lightning (Managed)	~	6
AppExchange Marketplace	2	AMSTAT Admin App	AMSTAT_Admin_App	AMSTAT Admin App Classic		2/6/2020, 7:56 AM	Classic (Managed)		1
Connected Apps	3	App Launcher	AppLauncher	App Launcher tabs		1/9/2020, 4:02 AM	Classic	~	
Connected Apps OAuth	4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.		1/9/2020, 4:03 AM	Lightning	~	
Usage	5	Community	Community	Salesforce CRM Communities		1/9/2020, 4:02 AM	Classic	~	
Manage Connected Apps	6	Content	Content	Salesforce CRM Content		1/9/2020, 4:02 AM	Classic	~	
<ul> <li>Lightning Bolt</li> </ul>	7	Force.com	Force_com	Start Here		1/9/2020, 4:02 AM	Classic	~	
Flow Category	8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience		1/9/2020, 4:02 AM	Lightning	~	
Lightning Bolt Solutions	9	Marketing	Marketing	Best-in-class on-demand marketing automation		1/9/2020, 4:02 AM	Classic	~	
Mobile Apps	10	Platform	Platform	The fundamental Lightning Platform		1/9/2020, 4:02 AM	Classic		
Lightning Experience on iPad	11	Retail Execution	Retail	Manage your retail inventory, promotions, planograms and other instore activities		1/9/2020, 4:02 AM	Lightning	~	
Browsers (Beta)	12	Sales	Sales	The world's most popular sales force automation (SFA) solution		1/9/2020, 4:02 AM	Classic		
✓ Salesforce	13	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more		2/6/2020, 8:06 AM	Lightning	~	- (
Salesforce Branding		Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen		1/9/2020, 4:02 AM	Lightning		5

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.

i Lightning App Builder 🛛 🕸 A	op Settings 📑 Pages 🗸	Sales
PP SETTINGS App Details & Branding App Options Jtility Items	Navigation Items Choose the items to include in the app, and arrange the order in which they appear. Users can p desktop. These items are dropped from the navigation bar when the app is viewed in a format the Available Items C Create V Selected Items	hat the item doesn't support.
Navigation Items	Q. Type to filter list	bunts
User Profiles	Yype to htter list      Zan Action Plan lemplates     Cont	tacts
App Performance (Beta)		htAircraft
	Aircraft Type Mapping	TAT
	O AMSTAT	nt Aircraft 2
	AMSTAT Mapping	aft Type
	AMSTAT Mapping Opp	ortunities
	App Launcher	
	🛓 Approval Requests	s
	S Assessment Indicator Definitions	paigns
	Assets Oash	nboards
	S Assortments	orts
	4 Authorization Form	ndar
	4 Authorization Form Consent	15
	4 Authorization Form Data Use	casts
	Authorization Form Text	TAT_Aircraft 🕲
		Cancel

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.

Setup Object Manager 🗸 Home Q Quick Find SETUP 2 Profiles Setup Home Lightning Experience Transition **User Profiles** Assistant New Salesforce Mobile App QuickStart Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link. Lightning Usage Profile New ADMINISTRATION Action Name Del AMSTAT Users Analytics Cloud Integration User Permission Sets Analytics Cloud Security User Profiles Authenticated Website Public Groups Chatter External User Queues Chatter Free User Chatter Moderator User Roles Chatter Only User User Management Settings Company Communities User Users Contract Manager

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

Click on "Object Settings". You will see that this profile has no access to the AMSTAT\_Aircraft.

Setup Home Object	Manager 🗸		
Q Quick Find	SETUP Profiles		<u> AUBUC ADAS-</u>
Setup Home			
Lightning Experience Transition	AWISTAT		
Assistant	Q. Find Settings X   Clone Delete Edit Properties		
New Salesforce Mobile App QuickStart Lightning Usage	Profile Overview > Object Settings  All Object Settings		
ADMINISTRATION	Object Name	Object Permissions	Total Fi
✓ Users	Account Aircraft Relations	Read, Create, Edit, Delete	7
Vosers	Accounts	Read, Create, Edit, Delete	37
Permission Sets	Action Plans	No Access	7
Profiles	Action Plan Template Item Assessment Indicators	No Access	2
	Action Plan Templates	No Access	
Public Groups	Addresses	Read, Create, Edit	7
Queues	Aircraft Type	Read, Create, Edit, Delete, View All, Modify All	6
	Aircraft Type Mapping	Read, Create, Edit, Delete	8
Roles	AMSTAT	-	
User Management Settings	AMSTAT		
Users	AMSTAT Aircraft	No Access	56
Users	AMSTAT Mapping	-	
> Data	AMSTAT Mapping	-	
> Email	App Analytics Query Requests	No Access	
/	App Launcher		-

Click on AMSTAT\_Aircraft and then the "Edit" button.

Setup Home Obje	ct Manager 🗸	
Q Quick Find	SETUP Profiles	ET THE STREET WANNE HIMLE TRANSFELTTERS ALL TABASALL TABLES ALL TABASALL THERE
Setup Home	Fiomes	
Lightning Experience Transition Assistant		
New Salesforce Mobile App QuickStart		X Clone Delete Edit Properties
Lightning Usage		
ADMINISTRATION	Profile Overview > Object Set	
✓ Users	AMSTAT_Aircraft	Edit
Permission Sets	Tab Settings Tab Hidden	
Profiles	AMSTAT Aircraft: Record T	Types and Page Layout Assignments
Public Groups	Record Types	Page Layout Assignment
Queues	-Master-	AMSTAT_Aircraft_Default Layout

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.

		Q, Se	earch Setup			
Setup Home Object	t Manager 🗸					
Q Quick Find	SETUP Profiles		- HANSETH COULDERS AND THE CONSTRUCT OF	PAXS		
Setup Home		11/1/1/2011				
Lightning Experience Transition Assistant AMSTAT						
New Salesforce Mobile App QuickStart	Q. Find Settings 8	Clone Delete Edit Properties				
Lightning Usage						
ADMINISTRATION	Profile Overview > Object Settings - A	AMSTAT_Aircraft				
✓ Users	AMSTAT_Aircraft		Save Cancel			
Permission Sets	Tab Settings					
Profiles	Default On					
Public Groups	AMSTAT_Aircraft: Record Types and Pa	ge Layout Assignments				
	Record Types	Page Layout Assignment				
Queues	-Master-	AMSTAT_Aircraft_Default Layout				
Roles						
User Management Settings	Object Permissions					
Users	Permission Name	Enabled	1			
> Data	Read	0				
> Email	Create					
y criai	Edit Delete	19 13				
PLATFORM TOOLS	View All					
✓ Apps	Modify All					
App Manager	Field Permissions					
AppExchange Marketplace	Field Name	Read Access	Edit Access			
> Connected Apps	ADS-B Compliance	8				
Aircraft ID     Aircraft ID     Aircraft ID     Aircraft ID     O						
	Airport Code APU Maintenance Plan	2				
> Mobile Apps	Apu Type	<u> </u>				
> Packaging	Asking Price(Text)	0				
> Feature Settings	Asking Price(Value)	0				

Select Account Aircraft Relations from the dropdown.

Setup Home Object	t Manager 🗸	
Q Quick Find Setup Home	SETUP Profiles	DIWSZU U ZZ
Lightning Experience Transition Assistant New Salesforce Mobile App QuickStart	Profile AMSTAT Q. Find Settings	
Lightning Usage	Profile Overview > Object Settings  AMSTAT_Aircraft Account Aircraft Reptions Account Aircraft Reptions	Edit
✓ Users Permission Sets	Amistrat_Aircraft         Accounts           Tab Settings         Action Plans           Default On         Action Plan Template Item Assessment Indica           Action Plan Templates         Action Plan Templates	
Profiles Public Groups	AMSTAT_Aircraft: Record Types and P Addresses Aircraft Type	

## Click the "Edit" button.

Setup	Home	Object Manager 🗸	
Q Quick Find		SETUP Profiles	ALL LILLON ALLS A L'ANNAIR ANNA L'ANNS ANN LITTEN
Setup Home		Flomes	
Lightning Experience Assistant	Transition	Profile	
New Salesforce Mob	ile App Qui	ckStart Q. Find Settings	X   Clone Delete Edit Properties
ightning Usage			
ADMINISTRATION	e.	Profile Overview > Object	Settings  Account Aircraft Relations
<ul> <li>Users</li> </ul>		Account Aircraft Rela	tions
		Record Types and Page	Layout Assignments
Permission Se	ets	Record Types	Page Layout Assignment
Profiles		Master	Account Aircraft Relation Layout
Public Group	5	Object Permissions	
Outputer			

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 Obje	ct Manager 🗸					
Q Quick Find		A THESH AND	. 10007 - XUXSXUX- <i>ZZIZE</i>			
Setup Home	Promes					
Lightning Experience Transition Assistant	Profile					
New Salesforce Mobile App QuickStart	Q. Find Settings	X Clone Delete Edit Properties				
Lightning Usage						
ADMINISTRATION	Profile Overview > Object Set	ttings 💌 Account Aircraft Relation	ns 💌			
√ Users	Account Aircraft Relation	ns	Figve Cancel			
Permission Sets	Record Types and Page Lay	yout Assignments				
Profiles	Record Types					
Public Groups	Master Account Aircraft Relation Layout					
Queues	Object Permissions					
			Enabled			
Roles						
User Management Settings	Create	Read				
1122-22	Edit					
Users	- Section -		0			
> Data	Delete					
> Email	View All Modify All					
> Email	Modily All					
PLATFORM TOOLS	Field Permissions					
Apps	Field Name	Read Access	Edit Access			
- LUCK S	Account					
App Manager	Aircraft	2				
AppExchange Marketplace	Created By	$\langle \nabla \rangle$				

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 Ob	ject Manager 🗸	111 - <i>FH</i> REN	N MILLEY YEAR	uniz Hus	-111 1112:55	1117 <i>1 / NSMM</i>	
SETUP > OBJECT MANAGER	2						
Account	MAL NO 19		111-111-			STELL	
D-1-1-	Save V Quick Save Preview	w As V Cancel	Undo 🛝 Redo 📗 📰 L	ayout Properties			
Details	Custom Links	Quick Find Relat	ed List Name				
Fields & Relationships	Quick Actions	Account Aircraft	Associated Locations	Contacta	Film	Örders	
	Mobile & Lightning Actions	Activity History	Conme	Content Deficertes	Molen & Alforitements	Fertners	
Page Layouts	Expanded Lookups	Approval History	Continuity Members	Contrauta	Open Activities	Related Content	
	Related Lists	Assets	Contant.Raise	Data (viegnation)	Oggettertion		
Lightning Record Pages	Visualforce Pages						
Buttons, Links, and Actions		1					*
	Related Lists						
Compact Layouts							
11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Contacts			Server [ 3	Berge Grontesta   Add to Ge	nosige /	
Field Sets	Contact Name		Title		Enell		
Object Limits	Sarah Sample		Sample Text		sarah.s	anole@company.com	
						111	
Record Types	1 04						
	Opportunition			( Marriel 11			

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.

Custom Links	Q Quick Find Relat	ed List Name					
Quick Actions	Account Aircraft	Associated Locations	Contacts	Files	Ordens		
Mobile & Lightning Actions	Activity History	Cases	Content Deliveries	s Notes & Attechments	Parinera		
Expanded Lookups	Approval History	Community Members	Contracts	Open Activities	Rolated Content		
Related Lists	Assets	Contact Roles	Data Integration	. Opportunities			
Report Charts /isualforce Pages				Related List Propert		A Deletion 0	
isoanace rayes				Helated List Propert	ies - Account Aircra	Int Helation2	×
Related Lists							Help 🥝
0 4				Columns			-
Account Aircraft Relati	ion2		No	Select fields to display of	on the related list. You car	n also re-order the selecte	ed fields.
Name				Available Fields		Selected Fields	
Sample Text				Last Activity Date		Name	
				Last Modified By	Add	Aircraft	Up
04				Last Modified By Alias Last Modified Date		Role	Up
Contacts				Owner Alias	•		Y
Contact Name		Title	1140	Owner First Name	Remove	E	Down
Sarah Sample		Sample Text		Owner Last Name			
Geren Gernpre		deniple lext		Record ID			
04				Sort By:	Default	~	
Opportunities			Net	(	Ascending		
Opportunity Name			1.114	0	Descending		<b>b</b>
Sample Text							
and particular							
04				Buttons			+
Cases			Ne				
Case		Contact Name			OK Cance	Revert to Defaults	
GEN-2004-001234		Sarah Sample		Sample Text	Sample Text	2	/6/2020, 8:32 AM

elated List P	roperties - Accour	It Aircraft Helatio	n2	
				Help 🕜
olumns				
Select fields to d	lisplay on the related lis	t. You can also re-ord	ler the selected fie	lds.
Available Fie Last Activity I Last Modified Last Modified Last Modified Owner Alias Owner First N Owner Last N Record ID	Date By By Alias Date Jame	Add Remove	Fields	Up A Down
Sort By:	Default	~		
	O Descending			¥.
uttons				
	OK	Cancel Rever	t to Defaults	
ample Text	Sar	nple Text	2/6/20	20, 8:32 AM

Repeat these steps for the AMSTAT Aircraft.

Details ields & Relationships P <b>age Layouts</b>	Save * Quick Save Previe Fields Buttons Quick Actions Mobile & Lightning Actions Expanded Lookups	Quick Find Relat Aircraft Relations Approval History Contant Deliveries Files		yout Properties					
ightning Record Pages	Related Lists Report Charts				Related List Pro	perties - Aircraf	t Relatio	ns	
Buttons, Links, and Actions		Sample Text							Help 🥑
Compact Layouts		2/6/2020 Sample Text			Columns				
ield Sets	Number of Engines	55,003			Select fields to dis	olay on the related lit	st. You can	also re-order the selected fields.	
Dbject Limits	EContacts (Header visible o				Available Field Last Activity Dat Last Modified B Last Modified B	o ,	Add	Selected Fields Name Account Role	Up
lecord Types Related Lookup Filters		Sample Text			Last Modified D Owner Allas Owner First Nar		Remove		Down
earch Layouts	System Information (Head	Sample Text			Owner Last Nan Record ID	10			
earch Layouts for Salesforce	🙆 Last Modified By	Sample Text			Sort By:	Default		*	
Classic	Custom Links (Header visi	lble on detail only)				Ascending			
alidation Rules	Mobile Cards (Salesfo	rce mobile only) 💷							
	Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile ca			Buttons					

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

***	Sales	Home	Leads	~	Accounts	$\sim$	Contacts	~	ClientAircraf	t 🗸	AMSTAT	Client Aircraft 2	2 ~	Aircraft Typ	e 🗸	Opportunities	~	Files	$\sim$	Tasks	$\sim$	Ca
<b>F</b>	Account Jet City	Pty Ltd			1111677		51X s 2777		<i>717</i> -0112		ADABUL 711	nue nu	s#111	- 1111 -	<u>5,111</u>		ADG		119	NS271		
Туре		Phone		Webs www	ite .jetcity.co	m.au			int Owner d. Doesburg a	2	Accour	nt Site	Indust	try								
De	tails	Relate	<u>d</u>	AN	ISTAT							a 711 /2-77		2.111			L IF A					_
	Accour	nt Aircraf	t Relat	ion2	(0)															Ne	w	
15	Contac	ts (1)																		Ne	w	

## Start using the AMSTAT App

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

ACCOUNTS	CONTACTS	AIRCRAFT	AIRPORTS	ADMIN	
					Login Please use your AMSTAT login credentials
					User name
					Password
					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<sup>®</sup> (Lightning Version)

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

## Uninstalling AMSTAT for Salesforce<sup>®</sup> from Lightning Version

For all the lighting 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:
  - o Account
  - o Contact
  - o 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.

DETAILS RELATED AMSTAT Add Component(s) Here					ngalan di Campitan filin kananan di sada
Add Component(s) Here	DETAILS	RELATED	AMSTAT		
Add Component(s) Here					
Add Component(s) Here					
				Add Component(s) Here	

- 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 Pa	ckages								
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	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 Uninstall									

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