



LeankorTM Deployment Guide (ISV)

Version 1.14 Rev. 3

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1 Before You Begin

- This deployment guide provides the required steps to install Leankor™ for the first time.

Prerequisites

Salesforce Editions & Recommendations

Salesforce Enterprise edition or better is supported.
Salesforce Professional and Group editions **are not supported** at this time.



As a fully native Salesforce application, it is recommended that the Salesforce Recommendations and Requirements for All Browsers are followed for full functionality of Leankor™.

If 3rd Party cookies are blocked, the following domains must be allowed for Leankor™ to function:

- *.visualforce.com
- *.cloudforce.com

Supported Browsers

Leankor™ leverages the latest mobile and web technologies available including HTML5, CSS3 and the Salesforce Mobile framework.

As such, only the following browsers are supported:



Google
Chrome



Mozilla
Firefox



Microsoft Edge

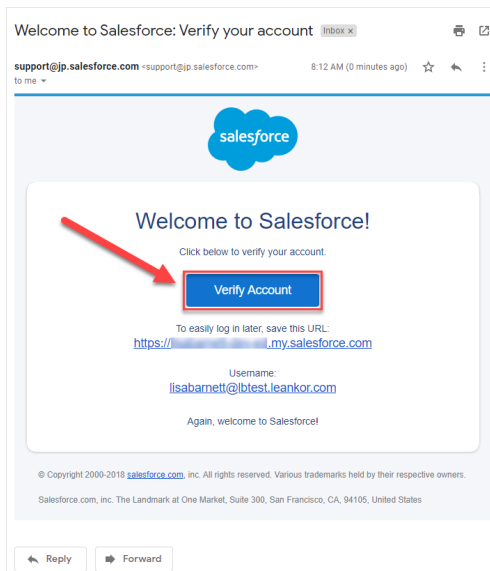


Apple Safari

2 Logging Into Salesforce

- Throughout this guide, you will be asked to login to Salesforce.
- If you are already using Salesforce, you may already be familiar with the steps below and can proceed to the next section.

1. If this is your first time logging into Salesforce, you should have received an email with a request for you to verify your account.



2. You will be prompted to create a password and confirm it.

3. Next, select a *Security Question* and enter the *Answer*.
4. Select *Change Password*.

Change Password

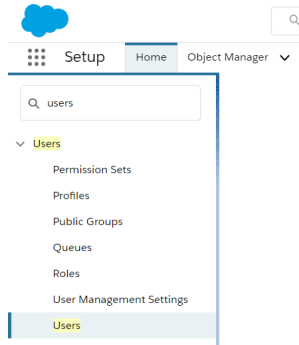
3 First Time Installation Steps

- Before proceeding, you will need the Leankor™ package install URL provided by your authorized Leankor™ representative.

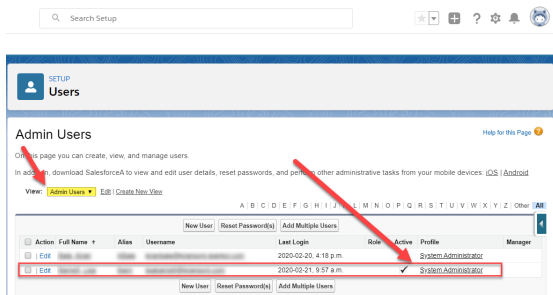
Pre-Installation Steps

- If you are not already logged in, please login to Salesforce.

- Verify that the user you are logged in as has the *System Administrator* profile assigned. Search for *users* in *Quick Find* and select the *Users* link.



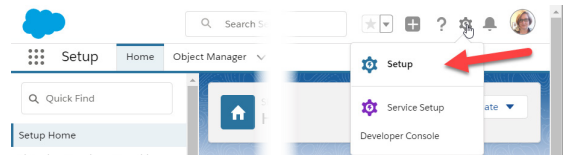
- Select *Admin Users* in the *View* list.



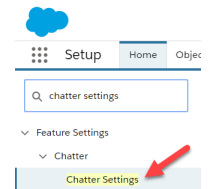
- Find your name in the list. The *System Administrator Profile* should be assigned to your user.

If your user does not have the System Administrator Profile assigned, please contact your Salesforce Administrator before proceeding.

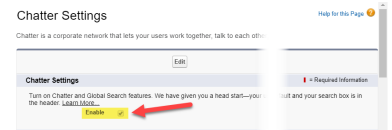
- Launch *Setup* in Salesforce by selecting:



- Chatter needs to be enabled. In *Quick Find*, enter *Chatter Settings*. Then select, the *Chatter Settings* link.



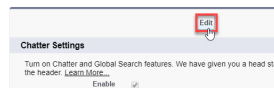
- The *Chatter Settings Enabled* box should be checked.



- If the box is not checked, select *Edit*. Check the *Enabled* box and then select *Save*.

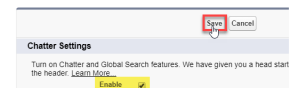
Chatter Settings

Chatter is a corporate network that lets your users work together, talk to e

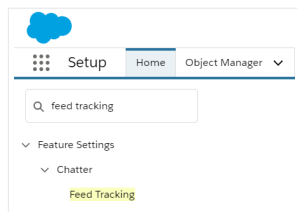


Chatter Settings

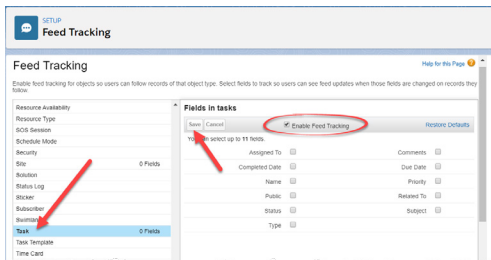
Chatter is a corporate network that lets your users work together, talk to ea



9. Search for *Feed Tracking* in *Quick Find* and select the *Feed Tracking* link.

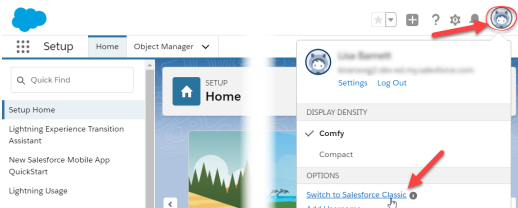


10. On the left hand side of the *Feed Tracking* setup, scroll down to the *Task* item.

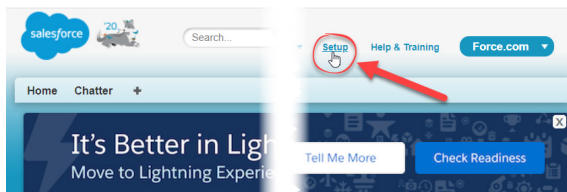


11. Select *Enable Feed Tracking*. Then, select *Save*.

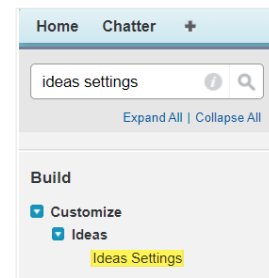
12. Next, switch to *Salesforce Classic*. Select *View Profile* and then select *Switch to Salesforce Classic*.



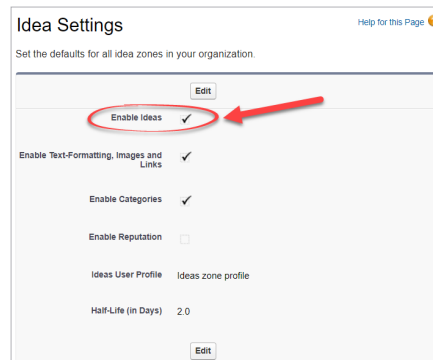
13. Launch *Setup*.



14. Search for *Ideas Settings* in *Quick Find* and select the *Ideas Settings* link.

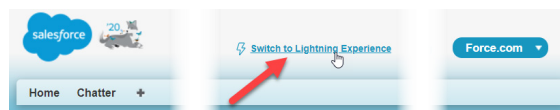


15. The *Enable Ideas* checkbox should be checked.

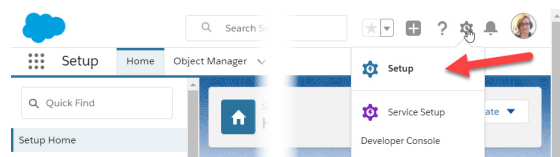


If *Enable Ideas* is not checked, select *Edit*. Check the *Enable Ideas* box and then *Save*.

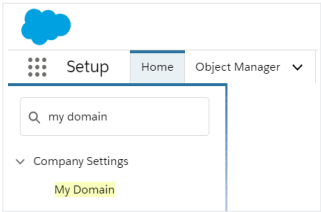
16. Select the *Switch to Lightning Experience* link.



17. Launch *Setup* in Salesforce by selecting:



18. *My Domain* needs to be enabled in *Company Settings*. Search for *my domain* in *Quick Find* and select the *My Domain* link.



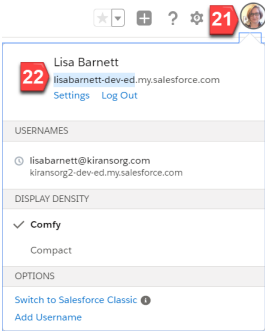
19. Scroll down to the *My Domain Settings* section.



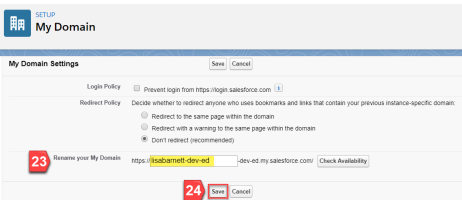
20. If there is no entry next to *Your domain name* is, select *Edit*.

21. Go to *View Profile*.

22. Copy the details before *.my.salesforce.com*



23. Paste the details you copied in step #22 into the space provided next to *Rename your My Domain*.

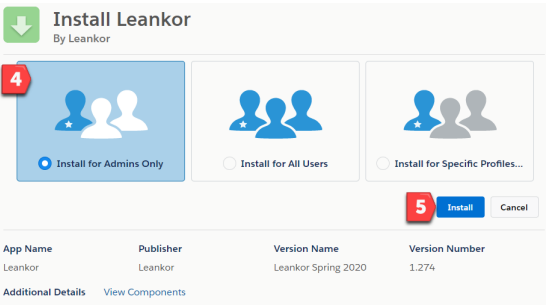


24. Select *Save*.

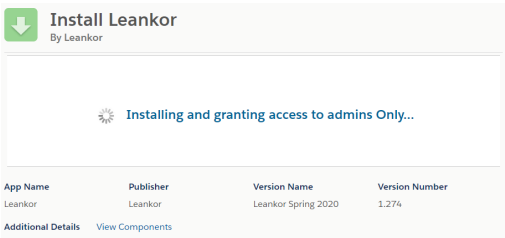
 You have completed the pre-installation steps!

Installing Leankor™

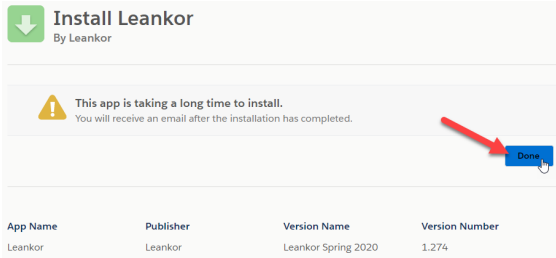
- If you are not logged into Salesforce, please login.
- Locate the package install URL provided by your authorized Leankor™ representative and copy from `/packaging/` to the end.
`https://login.salesforce.com/packaging/installPackage.apexp?p0=`
- Paste it into your current URL bar at the end of `.force.com` and hit *Enter*.
`https://yoursalesforceorg.lightning.force.com/packaging/installPackage.apexp?p0=`
- The Install splash screen will appear. Select *Install for Admins Only*.



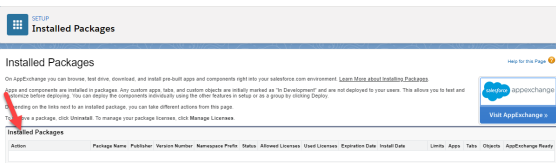
- Select *Install*.
- The Install screen will be displayed for a few minutes.



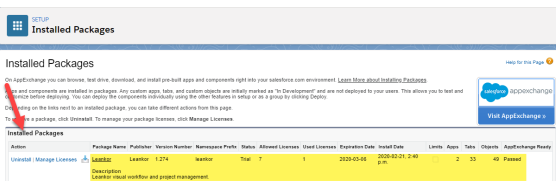
- Because the installation typically takes longer than the website's timeout setting, the following screen will likely appear. Select *Done*.



- The *Setup* page for *Installed Packages* will display automatically. The *Installed Packages* section will be blank until the installation is complete.



- You will receive an email once the installation has completed. Refresh your browser and the installed Leankor™ package information will be displayed.



If you encounter any issues or receive any error messages, please carefully review the information and the pre-install requirements in this document.

If you require assistance, please email:

support@leankor.com.



Leankor™ is now installed! Complete the post-installation steps and the system will be ready.

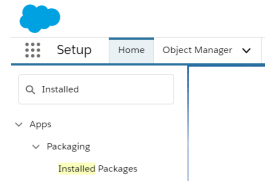
Post-Installation Steps

Contact your authorized Leankor™ representative and inform them that Leankor™ has been installed successfully. They will update your license information.

User Licenses

- You will need to provide the users who will be using Leankor™ with license rights. If you are not logged into Salesforce, please login.

- In *Quick Find*, enter *Installed Packages* and select the link that appears.



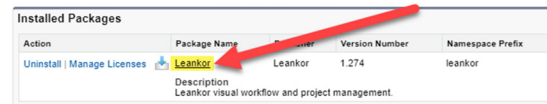
- In *Installed Packages*, select the *Leankor* link.

Installed Packages

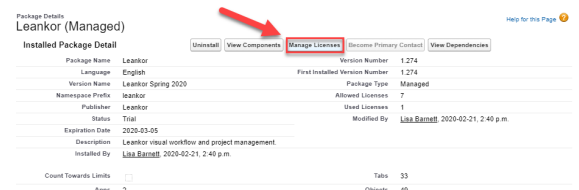
On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce environment. Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Dev" features in setup or as a group by clicking 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.



- Select *Manage Licenses*.



- Verify your license details. If you have purchased Leankor™, the *Status* should be *Active*. The *Allowed Licenses* should be equal to the number of licenses that were purchased.

Package Details
Leankor

Package Name: Leankor Publisher: Leankor
Status: Active Allowed Licenses: 7
Expiration Date: 2020-03-05 Used Licenses: 1

Licensed Users

Action	Full Name	Role	Active	Profile
Remove	Barnett, Liba		✓	System Administrator

- Select *Add Users*.

Package Details
Leankor

Package Name: Leankor Publisher: Leankor
Status: Trial Allowed Licenses: 7
Expiration Date: 2020-03-05 Used Licenses: 1

Licensed Users

Action	Full Name	Role	Active	Profile
Remove	Barnett, Liba		✓	System Administrator

- All active Salesforce users will be listed in the *Available Users* section.

Add Users
Leankor

View: All Create New View

Available Users

Action	Full Name	Role	Active	Profile
☒	Bala, Kiran		✓	System Administrator

Selected Users

No rows selected

Add Cancel

You can either select and add users from the Available Users listed or you can Add All Users. Steps for both options are provided below.

Selecting and Adding Users from Available Users

- Select the *checkbox* next to each user that you want to provide Leankor™ access to.

Add Users
Leankor

View: All Create New View

Available Users

Action	Full Name	Role	Active	Profile
☒	Bala, Kiran		✓	System Administrator

Selected Users

No rows selected

Add Cancel

- Select *Add*.

Adding All Users from Available Users

- Select *Add All Users* to provide all users with access to Leankor™.

Add Users
Leankor

View: All Create New View

Available Users

Action	Full Name	Role	Active	Profile
☒	Bala, Kiran		✓	System Administrator

Selected Users

No rows selected

Add Cancel

- A confirmation window will pop up. Select *OK*.

...mbedded page at lisabarnett-dev-ed.my.salesforce.com says
Are you sure you want to grant licenses to everyone listed in the All view?

OK Cancel

- Once users have been added, the screen will automatically refresh and the Leankor™ users will be displayed.

Package Details
Leankor

Package Name: Leankor Publisher: Leankor
Status: Trial Allowed Licenses: 7
Expiration Date: 2020-03-05 Used Licenses: 2

Licensed Users

Action	Full Name	Role	Active	Profile
Remove	Bala, Kiran		✓	System Administrator
Remove	Barnett, Liba		✓	System Administrator

You have provided Leankor™ licenses to your users!

Generic Streaming Setup

A permission set for Generic Streaming in Leankor™ will need to be configured.

- Launch *Setup* in Salesforce by selecting:

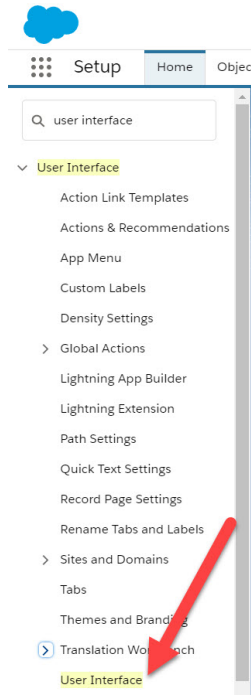
Setup Home

Setup

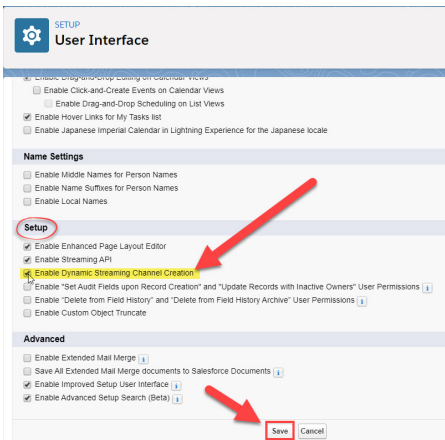
Service Setup

Developer Console

2. Search for *user interface* in *Quick Find*. Scroll down and select the *User Interface* link (at the bottom).

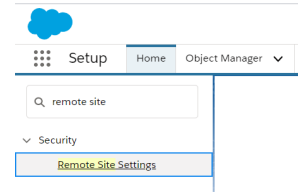


3. Scroll down to the *Setup* section and check the box: *Enable Dynamic Streaming Channel Creation*.



4. Select *Save*.

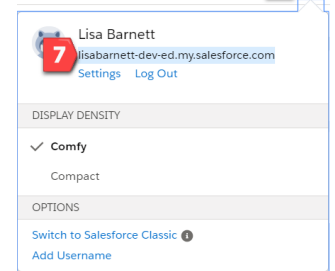
5. Search for *remote site* in *Quick Find*. Select *Remote Site Settings*.



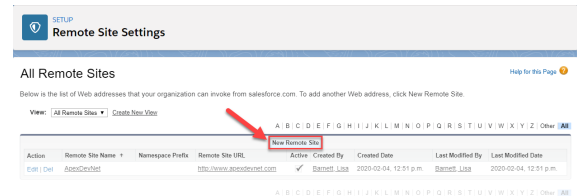
6. Select *View Profile*.



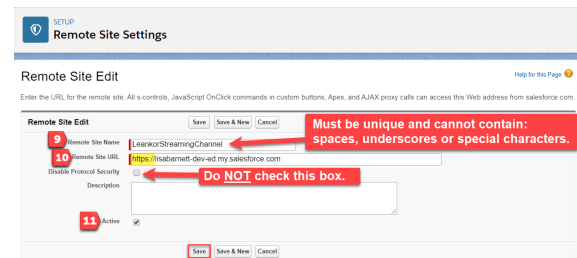
7. Select the *base URL* and *copy* it (CTRL + C).



8. Select *New Remote Site*.



9. Enter a *Remote Site Name* in the space provided. (i.e. LeankorStreamingChannel)

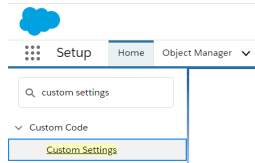


10. Enter **https://** and *paste the base URL* you copied in step #7 above in the *Remote Site URL* space provided.

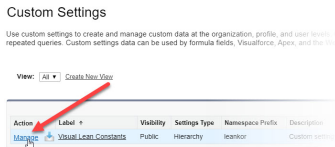
11. Ensure that the *Active* box is checked.

12. Select *Save*.

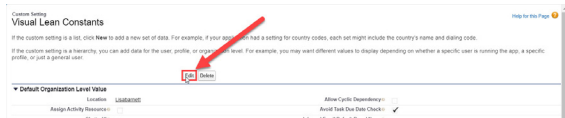
13. Search for *Custom Settings* in *Quick Find*. Select the *Custom Settings* link.



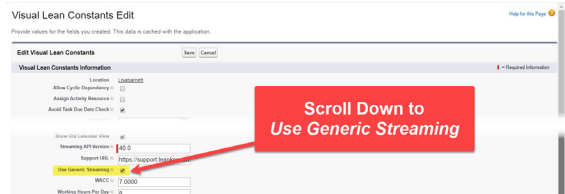
14. Select *Manage* next to *Visual Lean Constants*.



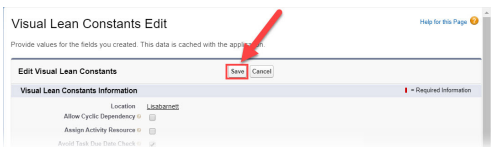
15. Select *Edit*.



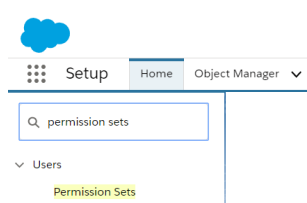
16. Scroll down to the bottom of the screen and check the box next to *Use Generic Streaming*.



17. Scroll back to the top and select *Save*.



18. Search for *permission sets* in *Quick Find*. Select the *Permission Sets* link.

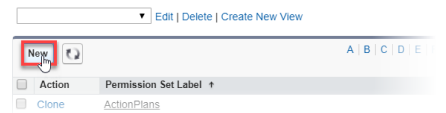


19. Select *New* in the Permission Sets window.

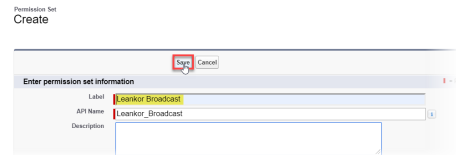
Permission Sets

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

In addition, you can use the SalesforceA mobile app to assign permission sets to a [Android](#)

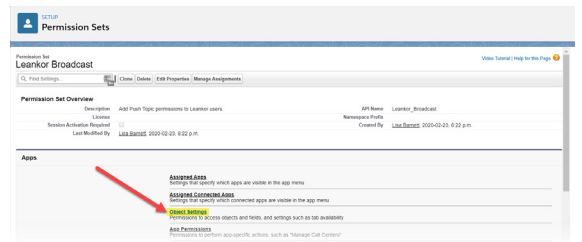


20. Enter *Leankor Broadcast* as the *Label* and press *tab*. The *API Name* will autofill.

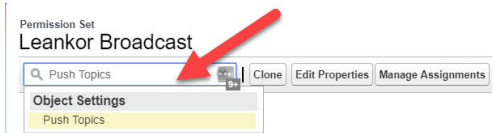


21. Select *Save*.

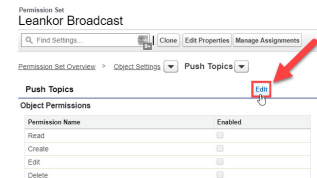
22. Next, select *Object Settings*.



23. In the *Find Settings...* search box, enter *Push Topics*. Select the *Push Topics* link when it appears.



24. Select *Edit*.



25. Check the boxes for all permissions listed:
Read, Create, Edit and Delete.

Permission Set
Leankor Broadcast

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings Push Topics

Push Topics Save Cancel

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒

26. Select **Save**.

27. In the Find Settings... search box, enter *Streaming*. Select the *Streaming Channels* link when it appears.

Permission Set
Leankor Broadcast

Find Settings... Streaming | Clone Delete Edit Properties Manage Assignments

Object Settings
Streaming Channels

28. Select **Edit**.

Permission Set
Leankor Broadcast

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Streaming Channels

Streaming Channels Edit

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☒
Modify All	☒

29. Check the boxes for all permissions listed: *Read, Create, Edit, Delete, View All and Modify All.*

Permission Set
Leankor Broadcast

Find Settings... Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings Streaming Channels

Streaming Channels Save Cancel

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☒
Modify All	☒

30. Select **Save**.



You have completed the Generic Streaming setup!

Assigning User's Permission Set

A permission set defines a user's access in Leankor™. There are many permission sets to choose from. When deciding on which permission set(s) to assign to your users, we recommend working with your authorized Leankor™ representative or our Customer Success team.

- For each user, determine which permission set they require.
- Search for users in *Quick Find* and select the *Users* link.

Setup Home Object Manager

Q. users

Users

- Permission Sets
- Profiles
- Public Groups
- Quizzes
- Roles
- User Management Settings
- Users
- Feature Settings
- Data.com

- Select to *View All Users*.

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details.

View: All Users Edit Create New User

- Select a user from the list.

Admin Users

On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile device: iOS | Android

View: All Users Edit Create New User

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Lisa Barnett	LBarn	leabarnett@leankor.com	2020-02-21, 1:30 p.m.	System Administrator	☒	System Administrator	

- Select the *Permission Set Assignments* link.

User
Lisa Barnett

Permission Set Assignments

Quizzes Membership | Permissions Set Activation Required | Permissions Set License Assignments | Permissions Set License | Public Group Membership | Subscription Settings by External | System History | User Profile | User Profile Assignments

User Detail

Name: Lisa Barnett | Alias: LBarn | Email: leabarnett@leankor.com

Role: System Administrator

- Select *Edit Assignments*.

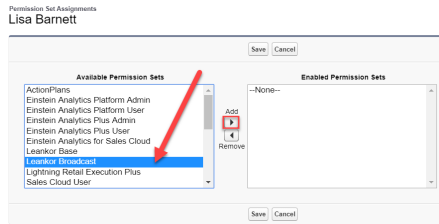
SETUP Users

Permission Set Assignments Edit Assignments

No records to display

Permission Set Assignments: Activation Required

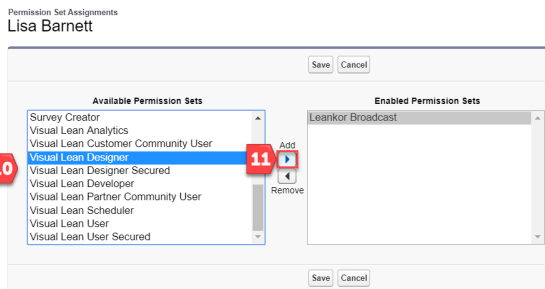
7. In the *Available Permission Sets*, scroll down to and select *Leankor Broadcast*.



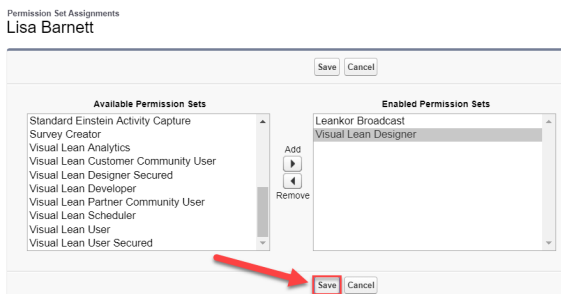
Important!

Assign the Leankor Broadcast permission set to every user.

8. Select *Add*.
9. Scroll down to the Visual Lean section.
10. Select a permission set for the user.



11. Select *Add*.
12. Select *Save*.

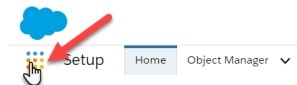


13. Repeat for each user.

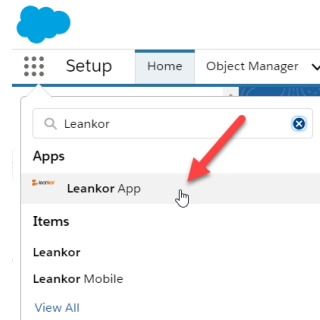
 You assigned the Permission Sets to your users setup!

Quick Action Remote Site Setting

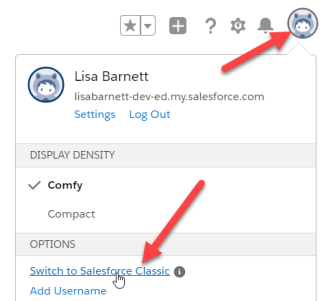
1. If you are not logged into Salesforce, please login.
2. Select the *App Launcher*.



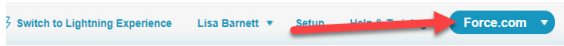
3. Enter *Leankor* and select *Leankor App*.



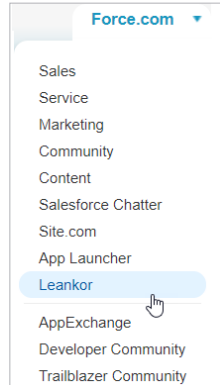
4. Select *View Profile* and then select *Switch to Salesforce Classic*.



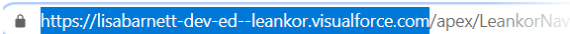
5. Select the *drop down arrow* next to Force.com in the upper right corner of the window.



6. Select *Leankor* from the list.



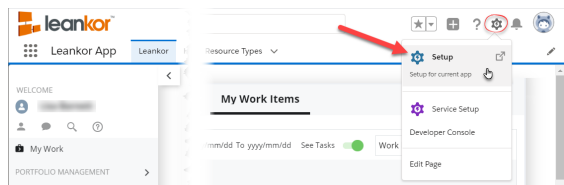
7. In the current URL bar, select and copy the beginning of the URL from `https://` to `visualforce.com`.



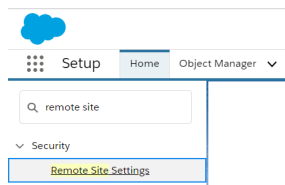
8. Switch back to *Lightning Experience*.



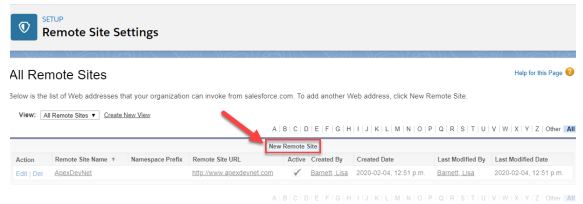
9. Launch *Setup* in Salesforce by selecting: ⚙️



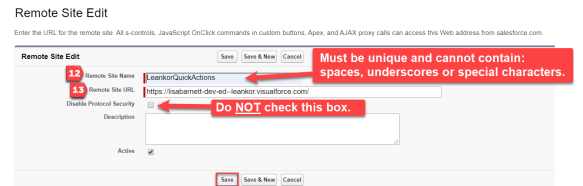
10. Search for *remote site* in *Quick Find*. Select *Remote Site Settings*.



11. Select *New Remote Site*.



12. Enter a *Remote Site Name* in the space provided. (i.e. LeankorQuickActions)



13. Paste the URL you copied in step #7 into the *Remote Site URL* field.

14. Select *Save*.



Congratulations!

You have completed the installation and your team can now login and use Leankor™!



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