



LeankorTM Deployment Guide (OEM)

Version 1.1 Rev. 1

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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

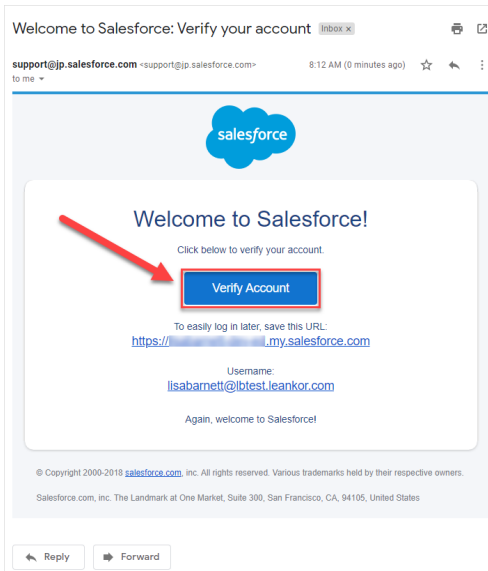


Apple Safari

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.

A screenshot of the "Change Your Password" form in Salesforce. The form includes the Salesforce logo and the title "Change Your Password". It prompts the user to enter a new password for lisabarnett@lbttest.leankor.com, with requirements for 8 characters, 1 letter, and 1 number. Red circles with numbers 2 and 3 highlight the "New Password" and "Confirm New Password" fields, and the "Security Question" section respectively. The security question is "In what city were you born?". There is an "Answer" field and a "Change Password" button. A note at the bottom states "Password was last changed on 2020-02-26, 8:12 a.m..".

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

Change Password

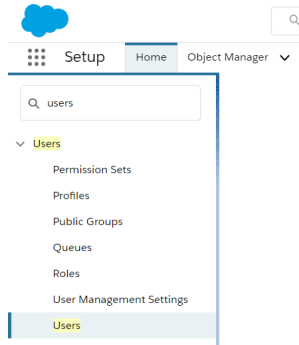
3 First Time Installation Steps

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

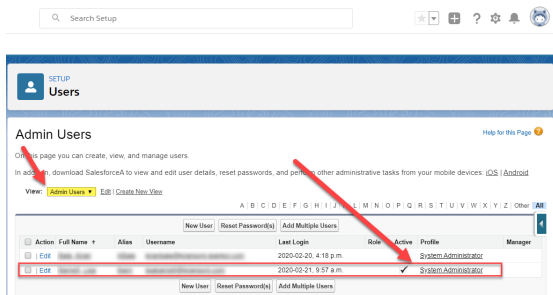
Pre-Installation Steps

- 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.



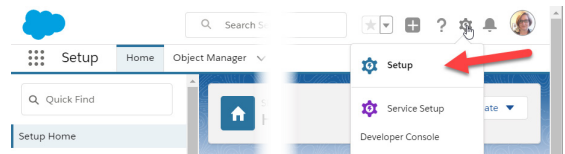
- Select *Admin Users* in the *View* list.



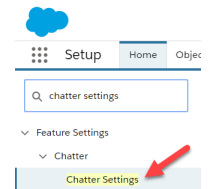
- Find your name in the list. The *System Administrator Profile* should be assigned to your user.

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

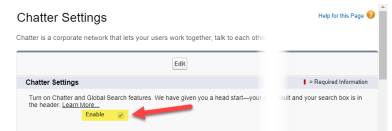
- Launch *Setup* in Salesforce by selecting:



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



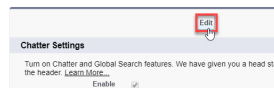
- The *Chatter Settings Enabled* box should be checked.



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

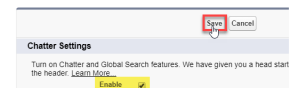
Chatter Settings

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

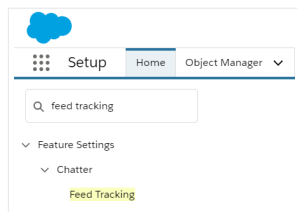


Chatter Settings

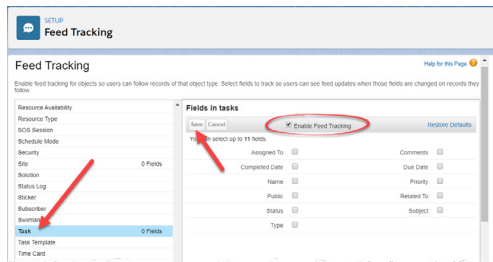
Chatter is a corporate network that lets your users work together, talk to ea



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

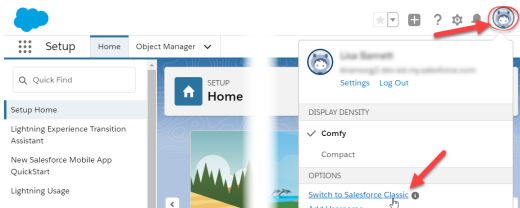


10. On the left hand side of the *Feed Tracking* setup, scroll down to the *Task* item.

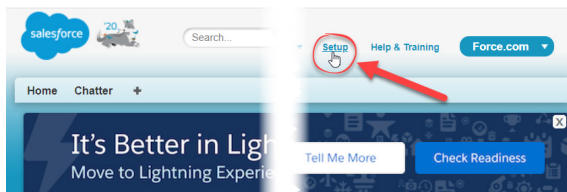


11. Select *Enable Feed Tracking*. Then, select *Save*.

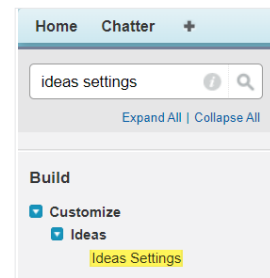
12. Next, switch to *Salesforce Classic*. Select *View Profile* and then select *Switch to Salesforce Classic*.



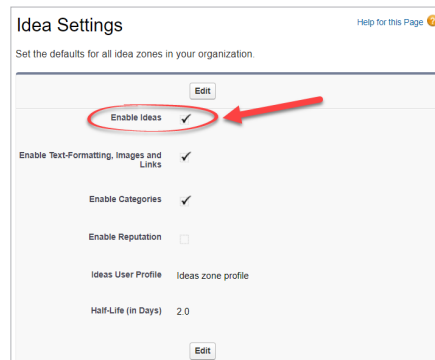
13. Launch *Setup*.



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

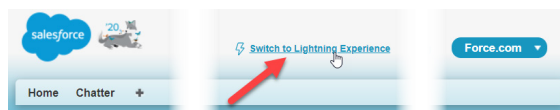


15. The *Enable Ideas* checkbox should be checked.

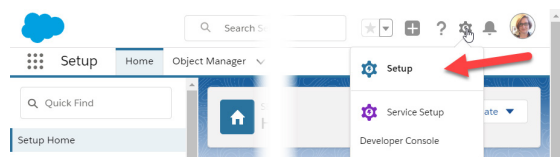


If *Enable Ideas* is not checked, select *Edit*. Check the *Enable Ideas* box and then *Save*.

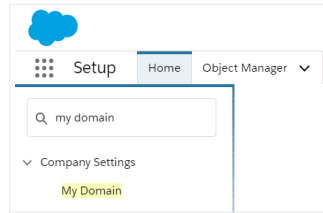
16. Select the *Switch to Lightning Experience* link.



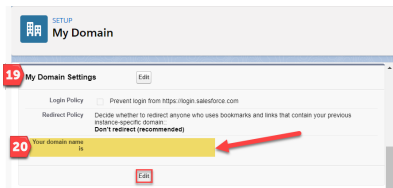
17. Launch *Setup* in Salesforce by selecting:



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

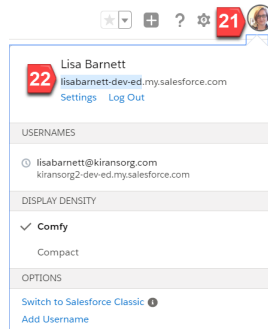


19. Scroll down to the *My Domain Settings* section.

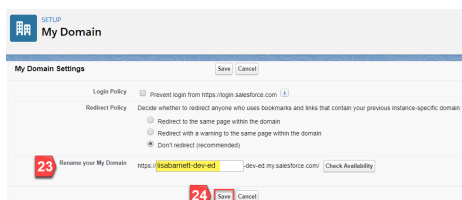


20. If there is no entry next to *Your domain name* is, select *Edit*.
21. Go to *View Profile*.

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*.



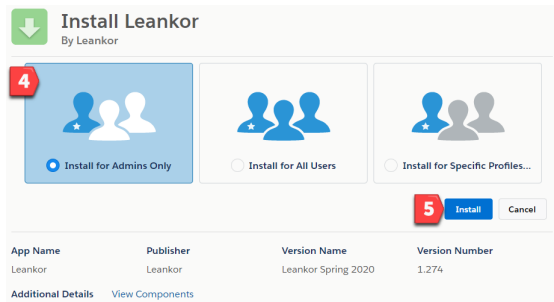
24. Select *Save*.



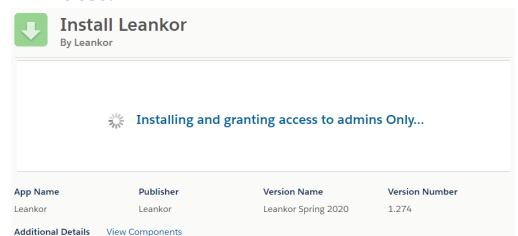
You have completed the pre-installation steps!

Installing Leankor™

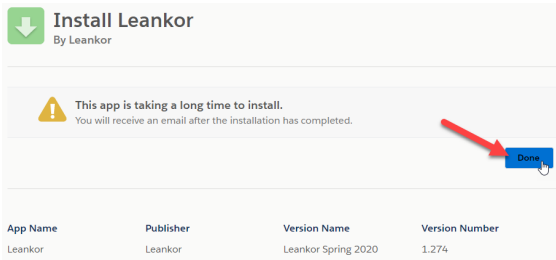
- If you are not logged into Salesforce, please login.
- Locate the package install URL provided by your authorized Leankor™ representative and copy from `/packaging/` to the end.
`https://login.salesforce.com/packaging/installPackage.apexp?p0=`
- Paste it into your current URL bar at the end of `.force.com`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



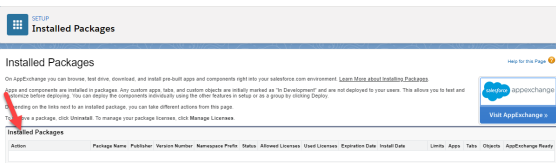
- Select *Install*.
- The Install screen will be displayed for a few minutes.



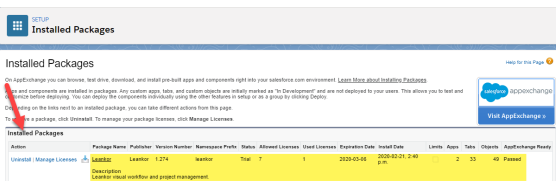
7. Because the installation typically takes longer than the website's timeout setting, the following screen will likely appear. Select *Done*.



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



9. 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.

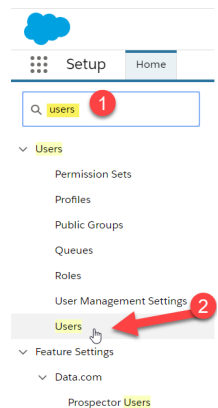
Post-Installation Steps

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

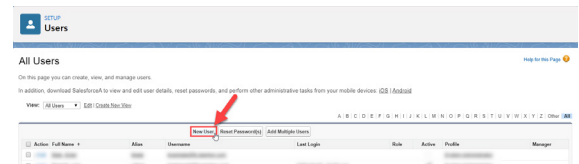
Creating Salesforce User Accounts

You will first need to create a Salesforce User Account for each user.

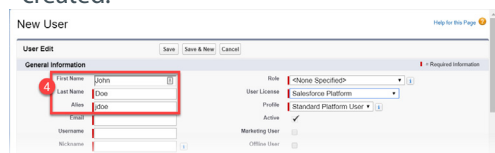
1. In *Quick Find*, enter *users*.
2. Select the *Users* link.



3. Select *New User*.



4. Enter the user's *First Name* and *Last Name* and press *Tab*. The *Alias* will be automatically created.



- Press **Tab** and enter the user's *Email*.

- Press **Tab**. The *Username* and *Nickname* fields will autofill.

Note: You can modify the *Username*. Some companies prefer to setup a specific Username structure. If changing the *Username* format, **it is important that each user's Username is unique.**

- While not required to setup a user, you can fill in the *Title*, *Company*, *Department* and *Division* fields. Press **Tab** to move to the next field.
- Select a *Role*. Contact *Leankor Customer Success* for assistance in selecting the appropriate role.

- For the *User License*, select *Salesforce Platform*.

- The *Profile* will autofill with *Standard Platform User*.

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

- Select **Save & New**.

- The user will receive an email with a link to login to Salesforce and a new User form will appear. Repeat steps #4 to #12. When you have created the last user account, select **Save**.

Assigning Leankor 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. 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**.

Action	Package Name	Version Number	Namespace Prefix
Uninstall Manage Licenses	Leankor	1.274	leankor
Description Leankor visual workflow and project management.			

- Select **Manage Licenses**.

5. 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 Used Licenses: 1

Expiration Date: 2025-03-05

Licensed Users

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

6. Select *Add Users*.

Package Details
Leankor

Package Name: Leankor Publisher: Leankor

Status: Trial Allowed Licenses: 7 Used Licenses: 1

Expiration Date: 2025-03-05

Licensed Users

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

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

Add Users
Leankor

View: All Create New User

Available Users

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

Selected Users

Action	Full Name
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

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

Add Users
Leankor

View: All Create New User

Available Users

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

Selected Users

Action	Full Name
☒	Bala, Kiran

Add Cancel

9. Select *Add*.

Adding All Users from Available Users

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

Add Users
Leankor

View: All Create New User

Available Users

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

Selected Users

Action	Full Name
No rows selected	

Add Cancel

11. 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

12. 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 Used Licenses: 2

Expiration Date: 2025-03-05

Licensed Users

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



You have created Salesforce User Accounts and provided them with Leankor™ licenses!

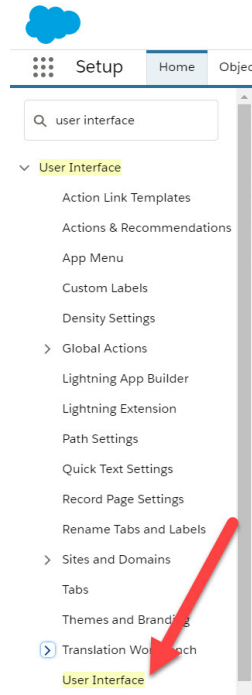
Generic Streaming Setup

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

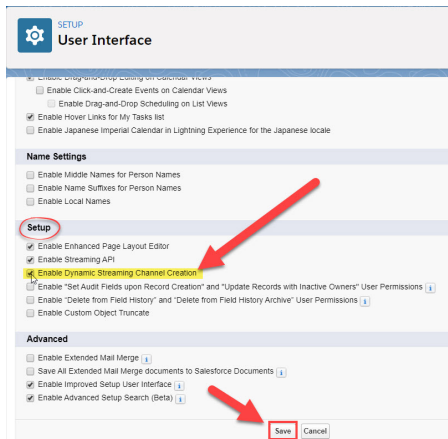
1. Launch *Setup* in Salesforce by selecting:

Setup Home Object Manager Setup Service Setup Developer Console

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

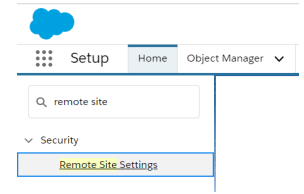


3. Scroll down to the *Setup* section and check the box: *Enable Dynamic Streaming Channel Creation*.



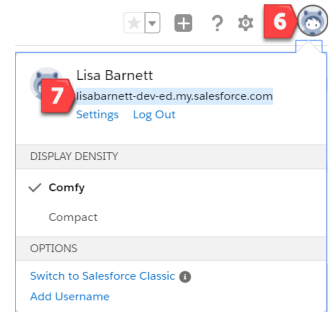
4. Select *Save*.

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

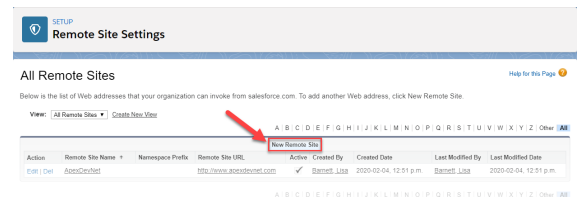


6. Select *View Profile*.

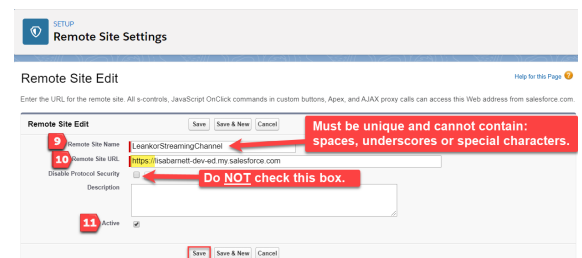
7. Select the *base URL* and copy it (CTRL + C).



8. Select *New Remote Site*.



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

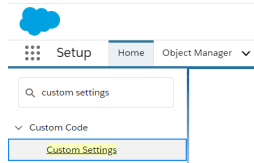


10. Enter **https://** and *paste the base URL* you copied in step #7 above in the *Remote Site URL* space provided.

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

12. Select *Save*.

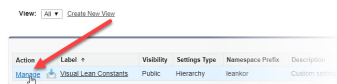
13. Search for *Custom Settings* in *Quick Find*. Select the *Custom Settings* link.



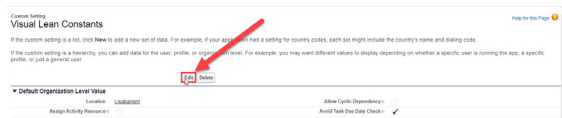
14. Select *Manage* next to *Visual Lean Constants*.

Custom Settings

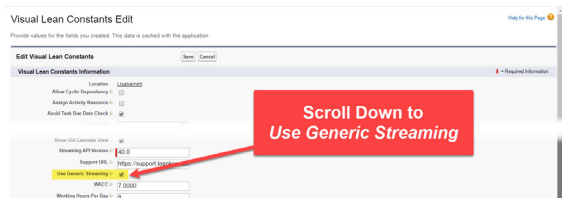
Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data can be used by formula fields, Visualforce, Apex, and the REST API.



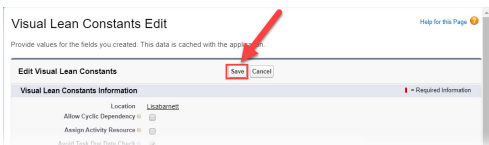
15. Select *Edit*.



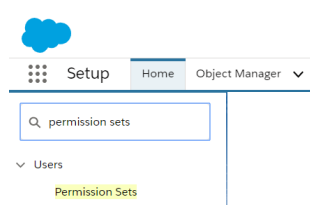
16. Scroll down to the bottom of the screen and check the box next to *Use Generic Streaming*.



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



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

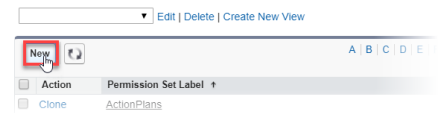


19. Select *New* in the *Permission Sets* window.

Permission Sets

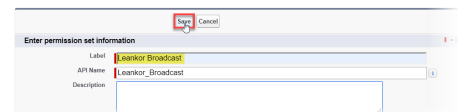
On this page you can create, view, and manage permission sets.

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



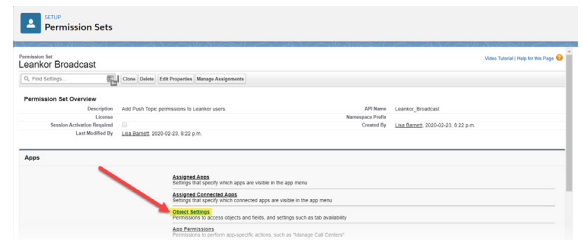
20. Enter *Leankor Broadcast* as the *Label* and press *tab*. The *API Name* will autofill.

Permission Set Create

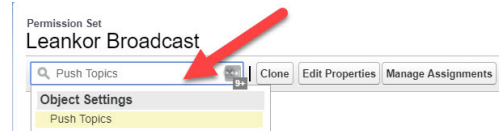


21. Select *Save*.

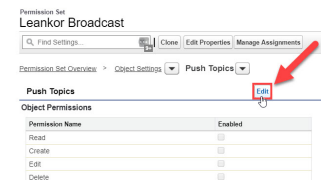
22. Next, select *Object Settings*.



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 30 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

Queues

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 devices: iOS Android

View: All Users Edit Create New User

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Beta Scott	Beta	bscott@leankor.com	2020-02-21 1:30 p.m.		☒	System Administrator	
Edit	David Lee	David	dlee@leankor.com			☒	System Administrator	

New User Reset Passwords Add Multiple Users

- Select the *Permission Set Assignments* link.

User
Lisa Barnett

Permission Set Assignments

Permission Set Assignments: Activation Required

User Detail

Name: Lisa Barnett

Alias: LBarn

Username: lbarnett@leankor.com

User License: Salesforce

Profile: System Administrator

Active: ☒

- Select **Edit Assignments**.

Setup Users

Permission Set Assignments

Edit Assignments

No records to display.

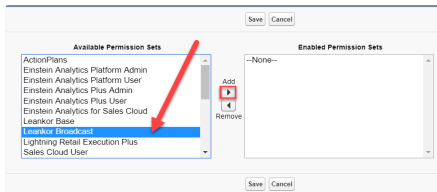
Permission Set Assignments: Activation Required

Edit Assignments

Permission Set Assignments Help

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

Permission Set Assignments
Lisa Barnett

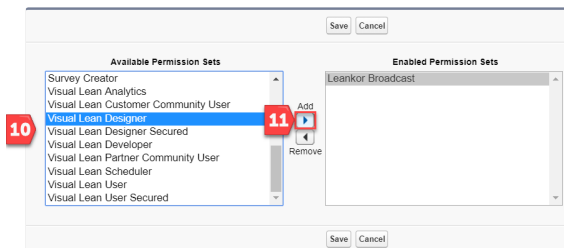


Important!

Assign the Leankor Broadcast permission set to every user.

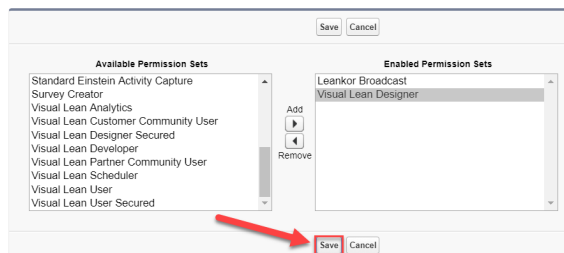
8. Select *Add*.
9. Scroll down to the Visual Lean section.
10. Select a permission set for the user. *If you require assistance, contact the Leankor Customer Success Team.*

Permission Set Assignments
Lisa Barnett



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

Permission Set Assignments
Lisa Barnett



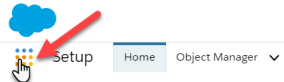
13. Repeat for each user.



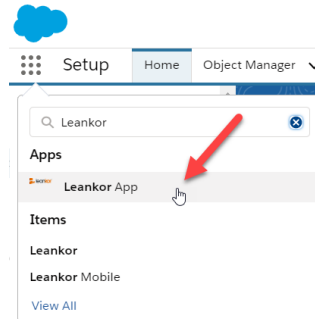
You assigned the Permission Sets to your users setup!

Quick Action Remote Site Setting

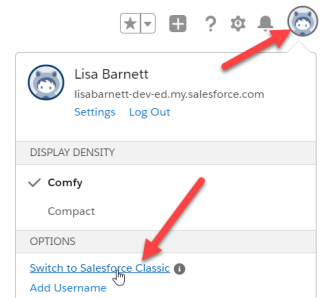
1. If you are not logged into Salesforce, please login.
2. Select the *App Launcher*.



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



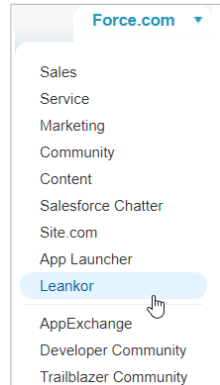
4. Select *View Profile* and then select *Switch to Salesforce Classic*.



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



6. Select *Leankor* from the list.



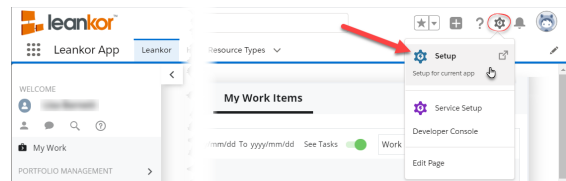
7. In the current URL bar, select and copy the beginning of the URL from `https://` to `visualforce.com`.

<https://lisabarnett-dev-ed--leankor.visualforce.com/apex/LeankorNav>

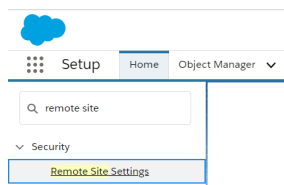
8. Switch back to *Lightning Experience*.



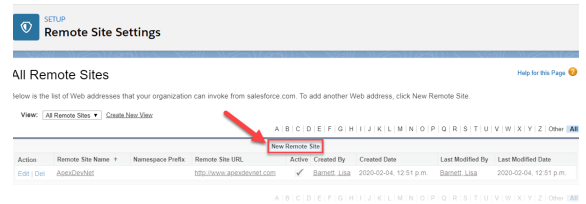
9. Launch *Setup* in Salesforce by selecting:



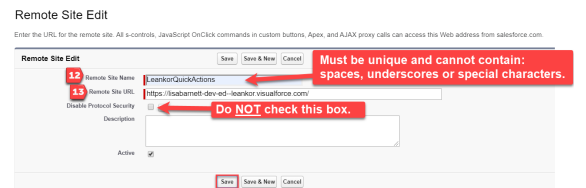
10. Search for *remote site* in *Quick Find*. Select *Remote Site Settings*.



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™!



www.leankor.com
support@leankor.com