



PRAVICI

Pravici PocketCred Managed Package Post Installation Document

Confidentiality

This document has been prepared by Pravici LLC. It is provided to you to assist you with the post installation tasks after the managed package is installed. By accepting this document, you agree that you will treat this information as confidential,

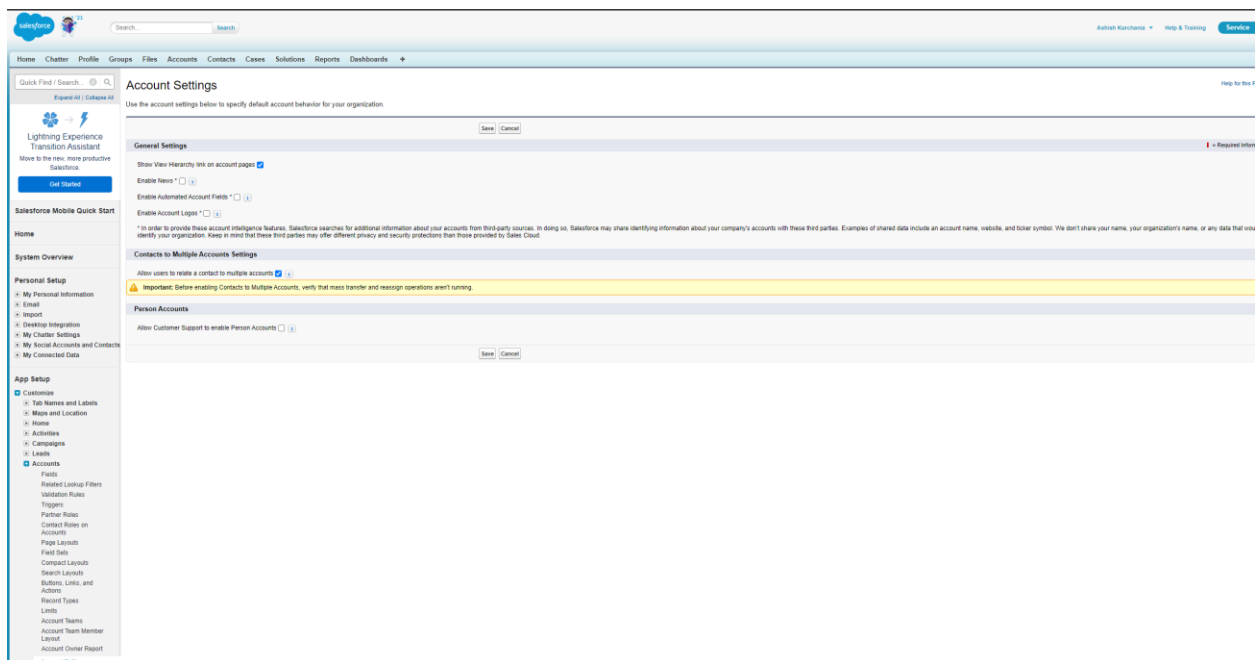
Instruction

1. The purpose of this document is to list out the steps to complete the post installation tasks after the managed package is installed.

Following steps need to be completed post installation of the Pravici PocketCred Managed Package:

Enable ContactsToMultipleAccounts

From Setup, enter Account Settings in the Quick Find box, then select Account Settings. Select Allow users to relate a contact to multiple accounts.



Enable the Health Cloud License & Install the Health Cloud Package

The org where you are trying to install the HealthCloud package should have HealthCloud licenses. After the licenses are provisioned to the org (you need to contact Salesforce support for that) you need to assign HealthCloud and HealthCloud Platform permission set licenses to your user. After you assign the licenses you should be able to install the package.

- To install the package, paste the following URL in the browser:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4W000002Aw8T>

- Enter the user Id & Password of the Salesforce, where you are trying to install the package.
- Select “Install for All Users”, click Install:

← → ↻ 🏠 pravicivtest-dev-ed.lightning.force.com/packagingSetupUI/jpLanding.app?apvId=0414W000002Aw8T

Apps Gmail Cascadia Personal Imported Pravid GM Jaythree Divit - GM Imported From IE temp bookmarks Dart ISKCON



Install HealthCloud

By Salesforce

☐ Install for Admins Only

☒ Install for All Users

☐ Install for Specific Profiles...

InstallCancel

You may see the message below:

pravicivtest-dev-ed.lightning.force.com/packagingSetupUI/ipToolong.app?apvId=04t4W000002Aw8T&isUpgrade=false&isUpgradeVersionLower=false

mail Cascadia Personal Imported Pravici GM Jayshree Dixit - GM Imported From IE temp bookmarks Dart ISKCON

Install HealthCloud
By Salesforce

This app is taking a long time to install.
You will receive an email after the installation has completed.

Done

App Name	Publisher	Version Name	Version Number
HealthCloud	Salesforce	r228.2	228.2

Description
Contains parts of the Health Cloud offering, including custom fields and objects.

Install PocketCred managed package:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4W00000307Ez>

Install PocketCred Test
By pravicivc Dev Org

☐ Install for Admins Only ☒ Install for All Users ☐ Install for Specific Profiles...

You're Installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

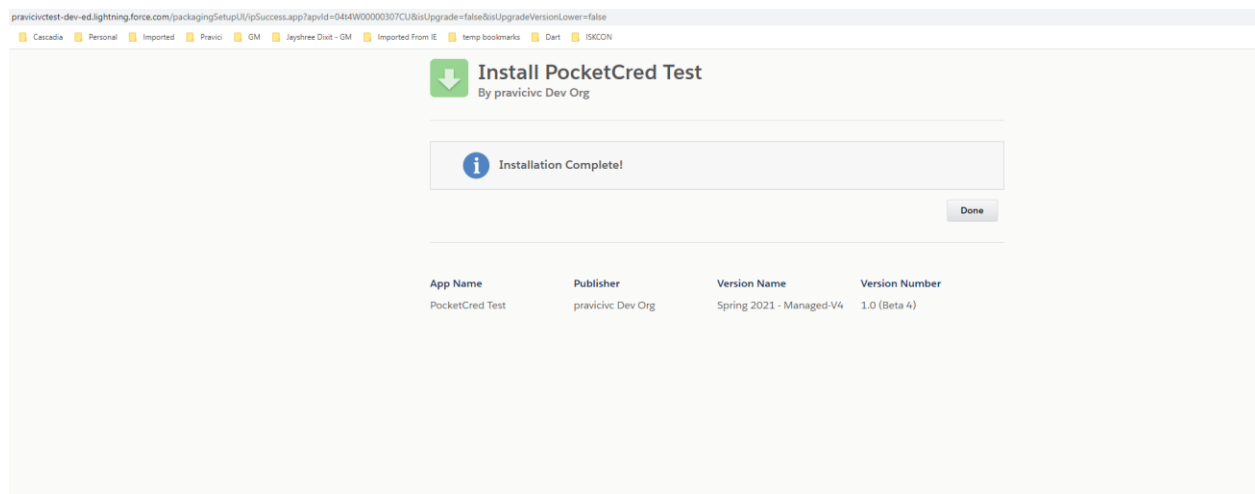
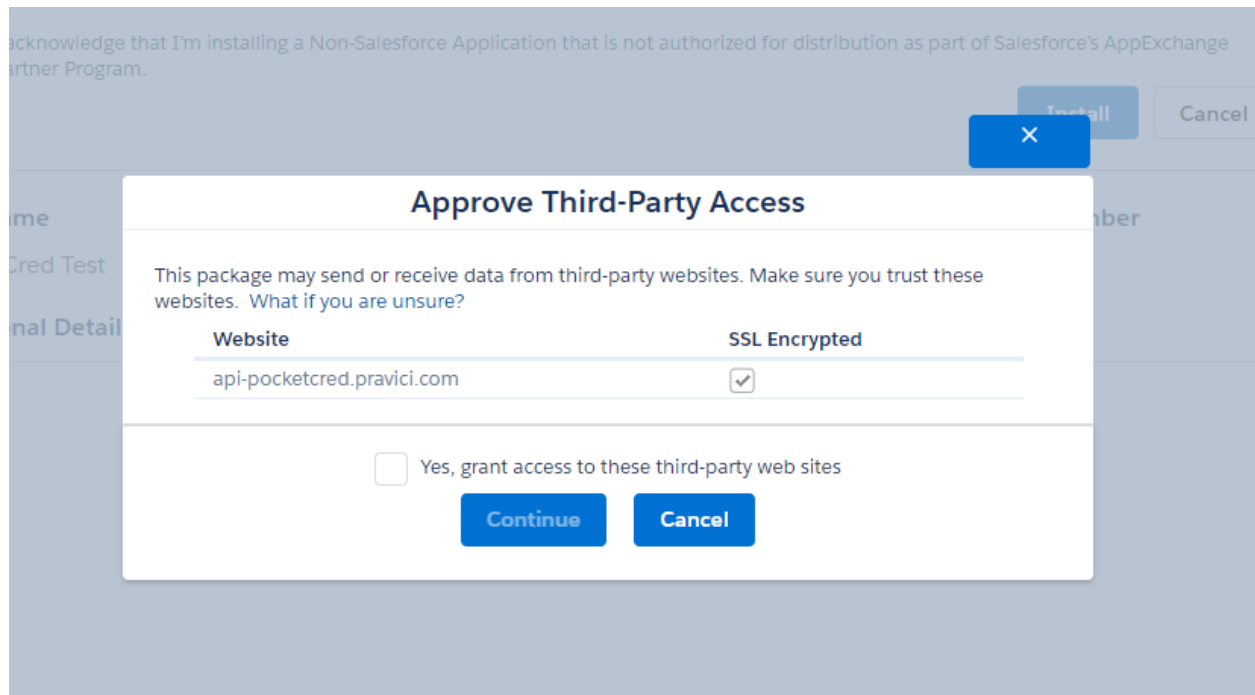
☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install Cancel

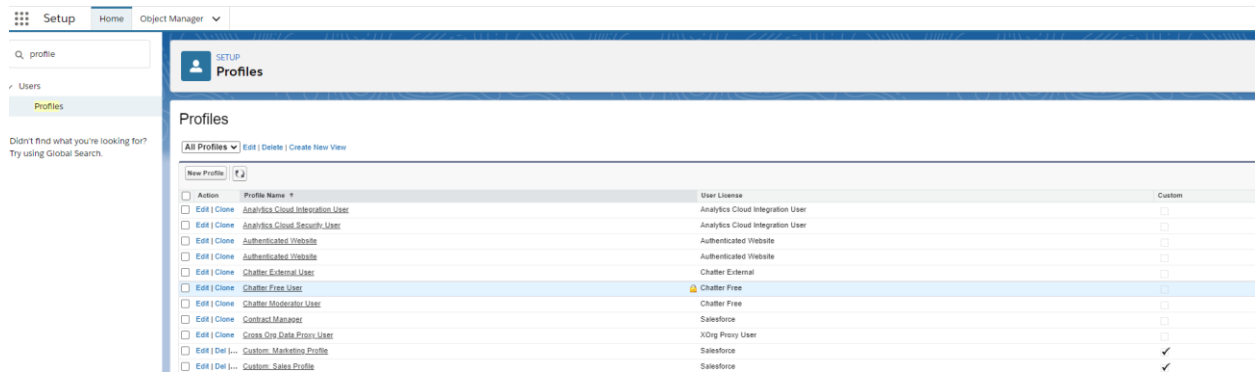
App Name	Publisher	Version Name	Version Number
PocketCred Test	pravicivc Dev Org	Spring 2021 - Managed-V4	1.0 (Beta 4)

Additional Details [View Components](#)

You will see the message below. Click Yes, to grant access to these third-party web sites.



Create a new profile named “[Pravici PocketCred Profile](#)”.



Setup Home Object Manager ▾

Q profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

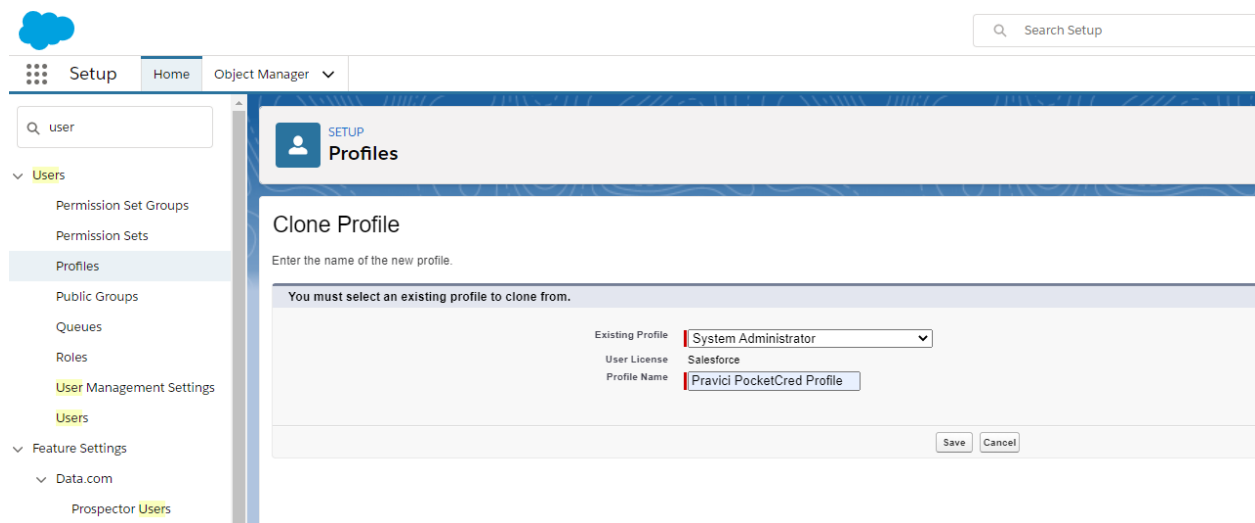
SETUP Profiles

Profiles

All Profiles ▾ Edit | Delete | Create New View

New Profile (+)

Action	Profile Name	User License	Custom
☐ Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	☐
☐ Edit Clone	Analytics Cloud Search User	Analytics Cloud Search User	☐
☐ Edit Clone	Authenticated Website	Authenticated Website	☐
☐ Edit Clone	Authenticated Website	Authenticated Website	☐
☐ Edit Clone	Chatter External User	Chatter External	☐
☐ Edit Clone	Chatter Free User	Chatter Free	☐
☐ Edit Clone	Chatter Moderator User	Chatter Free	☐
☐ Edit Clone	Contract Manager	Salesforce	☐
☐ Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	☐
☐ Edit Del ...	Custom: Marketing Profile	Salesforce	☒
☐ Edit Del ...	Custom: Sales Profile	Salesforce	☒



Setup Home Object Manager ▾

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

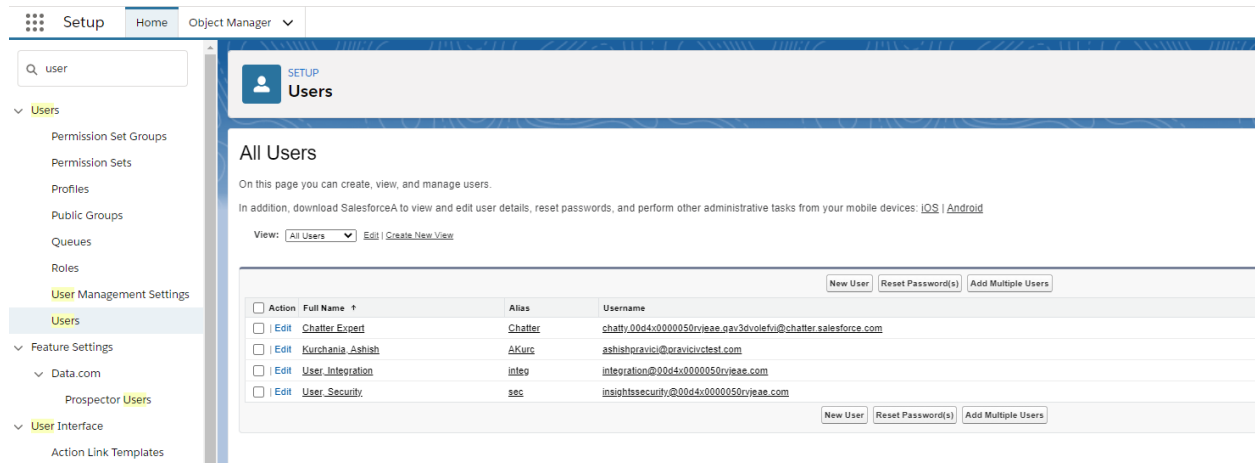
Existing Profile: System Administrator

User License: Salesforce

Profile Name: Pravici PocketCred Profile

Save Cancel

Create a new User who will be using this application and assign the Profile.



Setup Home Object Manager ▾

Q user

Users

Permission Set Groups

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Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

SETUP Users

All 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 View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username
☐ Edit	Chatter Expert	Chatter	chatter.00d4x000050r1eae.0e3d0e1v1@chatter.salesforce.com
☐ Edit	Kurzhania, Ashish	AKurc	ashishkuravic@praviciurtest.com
☐ Edit	User Integration	inteo	integration@00d4x000050r1eae.com
☐ Edit	User Security	ss	insightsecurity@00d4x000050r1eae.com

New User Reset Password(s) Add Multiple Users

Setup

Home

Object Manager

Q user

Users

Permission Set Groups

Permission Sets

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User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Global Actions

Publisher Layouts

Icons

Life Events and Business Milestones

Lightning App Builder

Lightning Extension

Path Settings

Quick Text Settings

Record Page Settings

SETUP

Users

User Edit

Save Save & New Cancel

General Information

First Name

PocketCred

Last Name

User

Alias

User

Email

pravicisalesforce@gmail.com

Username

pocketcredusers@pravic.co

Nickname

User1611462517973075430

Title

Company

Department

Division

Role

<None Specified>

User License

Salesforce

Profile

System Administrator

Active

Contract Manager

Custom Marketing Profile

Custom Sales Profile

Custom Support Profile

Marketing User

Minimum Access - Salesforce

Profile PocketCred Profile

Read Only

Solution Manager

Standard User

System Administrator

WDC User

Data.com User Type

<None-->

Data.com Monthly Addition Limit

100

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Debbug Mode

Send Apex Warning Emails

Make Setup My Default Landing Page

Quick Access Menu

Development Mode

Show View State in Development Mode

Cache Diagnostics

Salesforce CRM Content User

Receive Salesforce CRM Content Email Alerts

Receive Salesforce CRM Content Alerts as Daily Digest

Allow Forecasting

Call Center

Associate Vaccine Management App to Profile

Custom App Settings					
	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	☒	☐	Queue Management (standard__QueueManagement)	☒	☐
Analytics Studio (standard__Insights)	☒	☐	Sales (standard__LightningSales)	☒	☐
App Launcher (standard__AppLauncher)	☒	☐	Sales (standard__Sales)	☒	☐
Bolt Solutions (standard__LightningBolt)	☒	☐	Sales Console (standard__LightningSalesConsole)	☒	☐
Community (standard__Community)	☒	☐	Salesforce Chatter (standard__Chatter)	☒	☐
Content (standard__Content)	☒	☐	Salesforce CMS (standard__SalesforceCMS)	☒	☐
Health Cloud - Admin (HealthCloudGA__HealthCloudAdmin)	☒	☐	Sample Console (standard__ServiceConsole)	☐	☐
Health Cloud - Console (HealthCloudGA__HealthCloudConsole)	☒	☐	Service (standard__Service)	☒	☐
Health Cloud - Worklist (HealthCloudGA__HealthCloudWorklist)	☒	☐	Service Console (standard__LightningService)	☒	☐
Lightning Scheduler Setup (standard__LightningScheduler)	☒	☐	Site.com (standard__Site)	☒	☐
Lightning Usage App (standard__LightningUsageApp)	☒	☐	Vaccine Management (pravic__Vaccine_Management)	☐	☒
Marketing (standard__Marketing)	☒	☐	WDC (standard__Work)	☒	☐

Assign the Health Cloud Permission Set License to the User Record created above:

 **SETUP**
Users

User

PocketCred User

[Permission Set Assignments \(2\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(3\)](#) | [Personal Groups \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) |

User Detail

[Edit](#) [Sharing](#) [Change Password](#)

Name	PocketCred User
Alias	puser
Email	pravicisalesforce@gmail.com
Username	pocketcredusers@pravici.com
Nickname	User1611462517973875435 
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Locale	English (United States)
Language	English
Delegated Approver	
Manager	Acce
Receive Approval Request Emails	Only if I am an approver
Federation ID	Hig
App Registration: One-Time Password Authenticator	Connect 
App Registration: Salesforce Authenticator	Connect  S
Security Key (U2F)	 Receive Salesfor
Lightning Login	Learn  Receive Salesforce CRM C

Click Edit Assignment and select all the HealthCare & HealthCloud Permission Sets:

Permission Set Assignments			Edit Assignments
Action	Permission Set Label	Date Assigned	
Del	HealthCare Analytics Admin	1/23/2021	
Del	HealthCare Analytics User	1/23/2021	
Del	Health Cloud Foundation	1/23/2021	
Del	Health Cloud Utilization Management	1/23/2021	
Del	Health Cloud Member Services	1/23/2021	

Assign Account & EHR Immunization Page Layouts to the Profile:

Go to Setup -> Object Manager -> Account -> Page Layout.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts for Salesforce Classic. The main content area is titled 'Page Layouts' and shows a list of 8 items. The table has columns for Page Layout Name, Created By, and Modified By. The 'Page Layout Assignment' link is visible in the top right corner.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Ashish Kurchania, 1/6/2021, 1:40 PM	Ashish Kurchania, 1/6/2021, 1:40 PM
Account (Sales) Layout	Ashish Kurchania, 1/6/2021, 1:40 PM	Ashish Kurchania, 1/6/2021, 1:40 PM
Account (Support) Layout	Ashish Kurchania, 1/6/2021, 1:40 PM	Ashish Kurchania, 1/6/2021, 1:40 PM
Account Layout	Ashish Kurchania, 1/6/2021, 1:40 PM	Ashish Kurchania, 1/6/2021, 1:40 PM
Household Layout	Ashish Kurchania, 1/11/2021, 1:36 PM	Ashish Kurchania, 1/11/2021, 1:36 PM
Patient Layout	Ashish Kurchania, 1/11/2021, 1:36 PM	Ashish Kurchania, 1/11/2021, 1:36 PM
Payer Layout	Ashish Kurchania, 1/11/2021, 1:36 PM	Ashish Kurchania, 1/11/2021, 1:36 PM
PocketCredAccountLayout	PocketCred User, 1/27/2021, 5:03 PM	PocketCred User, 1/27/2021, 5:03 PM

Click on Page Layout Assignment, Edit Assignment:

Highlight the Pravici PocketCred Profile and then select PocketCredAccountLayout from the **Page Layout to Use** dropdown:

The screenshot shows the 'Edit Page Layout Assignment' page for the Account object. The left sidebar is the same as the previous screenshot. The main content area is titled 'Edit Page Layout Assignment Account'. Below the title, there is a table showing page layout assignments for different record types and profiles. The table has columns for Profiles, Record Types, and Page Layout To Use. The 'Pravici PocketCred Profile' is highlighted in blue. A dropdown menu is open for the 'Page Layout To Use' column, showing a list of available layouts, with 'PocketCredAccountLayout' selected.

Profiles	Record Types	Page Layout To Use
Customer Community Login User	Account Layout	Account Layout
Customer Community Plus Login User	Account Layout	Account Layout
Customer Community Plus User	Account Layout	Account Layout
Customer Community User	Account Layout	Account Layout
Customer Portal Manager Custom	Account Layout	Account Layout
Customer Portal Manager Standard	Account Layout	Account Layout
External Identity User	Account Layout	Account Layout
Force.com - App Subscription User	Account Layout	Account Layout
Force.com - Free User	Account Layout	Account Layout
Gold Partner User	Account Layout	Account Layout
High Volume Customer Portal	Account Layout	Account Layout
High Volume Customer Portal User	Account Layout	Account Layout
Identity User	Account Layout	Account Layout
Marketing User	Account Layout	Account Layout
Minimum Access - Salesforce	Not Assigned	Not Assigned
Partner App Subscription User	Account Layout	Account Layout
Partner Community Login User	Account Layout	Account Layout
Partner Community User	Account Layout	Account Layout
Pravici PocketCred Profile	PocketCredAccountLayout	PocketCredAccountLayout

Repeat the same for HER Immunization object, Go to Setup -> Object Manager -> HER Immunization -> Page Layout.

SETUP > OBJECT MANAGER

EHR Immunization

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Validation Rules

Page Layouts

2 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
EHR Immunization Layout	Ashish Kurchania, 1/11/2021, 1:35 PM	Ashish Kurchania, 1/11/2021, 1:36 PM
PocketCred EHR Page Layout	Ashish Kurchania, 1/23/2021, 9:46 PM	Ashish Kurchania, 1/23/2021, 9:46 PM

SETUP > OBJECT MANAGER

EHR Immunization

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Triggers

Validation Rules

Edit Page Layout Assignment

EHR Immunization

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells th

Save

Cancel

Page Layout To Use: PocketCred EHR Page Layout 1 Selected 1 Change

Profiles	Page Layout
Analytics Cloud Security User	EHR Immunization Layout
Chatter External User	EHR Immunization Layout
Chatter Free User	EHR Immunization Layout
Chatter Moderator User	EHR Immunization Layout
Contract Manager	EHR Immunization Layout
Cross Org Data Proxy User	EHR Immunization Layout
Custom: Marketing Profile	EHR Immunization Layout
Custom: Sales Profile	EHR Immunization Layout
Custom: Support Profile	EHR Immunization Layout
Force.com - App Subscription User	EHR Immunization Layout
Force.com - Free User	EHR Immunization Layout
Gold Partner User	EHR Immunization Layout
Identity User	EHR Immunization Layout
Marketing User	EHR Immunization Layout
Minimum Access - Salesforce	EHR Immunization Layout
Partner App Subscription User	EHR Immunization Layout
Partner Community Login User	EHR Immunization Layout
Partner Community User	EHR Immunization Layout
Pravici PocketCred Profile	PocketCred EHR Page Layout
Read Only	EHR Immunization Layout
Silver Partner User	EHR Immunization Layout
Solution Manager	EHR Immunization Layout
Standard Platform User	EHR Immunization Layout
Standard User	EHR Immunization Layout
System Administrator	EHR Immunization Layout
Work.com Only User	EHR Immunization Layout

Setup

Home

Object Manager

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Hierarchy Columns

Triggers

Validation Rules

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop

Save

Cancel

Page Layout to Use: -- Select Page Layout --

6 Selected

0 Changed

Profiles	Record Types	Master	Business	Household	Individual
Customer Community Login User		Account Layout	Account Layout	Account Layout	Account Layout
Customer Community Plus Login User		Account Layout	Account Layout	Account Layout	Account Layout
Customer Community Plus User		Account Layout	Account Layout	Account Layout	Account Layout
Customer Community User		Account Layout	Account Layout	Account Layout	Account Layout
Customer Portal Manager Custom		Account Layout	Account Layout	Account Layout	Account Layout
Customer Portal Manager Standard		Account Layout	Account Layout	Account Layout	Account Layout
External Identity User		Account Layout	Account Layout	Account Layout	Account Layout
Force.com - App Subscription User		Account Layout	Account Layout	Account Layout	Account Layout
Force.com - Free User		Account Layout	Account Layout	Account Layout	Account Layout
Gold Partner User		Account Layout	Account Layout	Account Layout	Account Layout
High Volume Customer Portal		Account Layout	Account Layout	Account Layout	Account Layout
High Volume Customer Portal User		Account Layout	Account Layout	Account Layout	Account Layout
Identity User		Account Layout	Account Layout	Account Layout	Account Layout
Marketing User		Account Layout	Account Layout	Account Layout	Account Layout
Minimum Access - Salesforce		Not Assigned	Not Assigned	Not Assigned	Not Assigned
Partner App Subscription User		Account Layout	Account Layout	Account Layout	Account Layout
Partner Community Login User		Account Layout	Account Layout	Account Layout	Account Layout
Partner Community User		Account Layout	Account Layout	Account Layout	Account Layout
Read Only		Account Layout	Account Layout	Account Layout	Account Layout
Silver Partner User		Account Layout	Account Layout	Account Layout	Account Layout
Solution Manager		Account Layout	Account Layout	Account Layout	Account Layout
Standard Platform User		Account Layout	Account Layout	Account Layout	Account Layout
Standard User		Account Layout	Account Layout	Account Layout	Account Layout
System Administrator		Account Layout	Account Layout	Account Layout	Account Layout
Work.com Only User		Account Layout	Account Layout	Account Layout	Account Layout

Go to Setup – Users:

Setup

Home

Object Manager

Users

Users

Permission Set Groups

Permission Sets

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

PocketCred User

User Detail

Add

Reset

Change Password

Name

Profile

Alias

Email

Username

Work Email

Title

Company

Department

Division

Address

Time Zone

Locale

Language

Delegated System Manager

Reserve Approval Request Grants

Federation ID

App Registration: One-Time Password Authentication

App Registration: Salesforce Authentication

Security Key (OTP)

Lightning Login

Temporary Notification Code (Expires in 1 to 30 hours)

Role

User License

Profile

Active

Working User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Mobile Push Registrations

Take over User Type

Accessibility Mode (Classic Only)

Debug Mode

High-Contrast Fields on Charts

Send Apex Warning Emails

Subscribe CRM Content User

Reserve Salesforce CRM Content Email Alerts

Reserve Salesforce CRM Content Alerts as Daily Digest

Make Setup My Default Landing Page

Quick Access Menu

Development Mode

Show View State in Development Mode

Cache Diagnostics

Allow Forwarding

Setup

Home

Object Manager

Users

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for?

Try using Global Search.

Users

Permission Set Assignments

Edit Assignments

No records to display

Edit Assignments

Enable Person Account:

Important: To use Person Accounts, your org must meet the following requirements.

- There is at least one record type for accounts.
- Users that have read permission on accounts have read permission on contacts.
- Organization-wide default sharing is set so that Contact is “Controlled by Parent” or Account and Contact is “Private”.

After you have met these requirements, we'll provide information on how to finish enabling Person Accounts. [Learn More](#)