

Setting up an AssetOptics Trial Org (with data) from the AppExchange

These instructions are to provision a **new** Salesforce Org with the AssetOptics package preinstalled and populated with sample data.

1. Enter the following URL in your browser: appexchange.salesforce.com
2. Search for "AssetOptics" in the search box at the top of the page.
3. Click on the green 'Get it Now' button.
4. Continue as Guest and fill out the form.

Note: We recommend you DO NOT use your company email address as your username in this training org as this will prevent you from using it in your production org (Salesforce usernames cannot be reused and they must be unique across all Salesforce orgs). You WILL, of course, need to enter your valid email address in the email field to receive your login credentials.

Ready to start your trial?

Fill out this form and we'll set you up with a free trial of AssetOptics CMMS/EAM - Facilities, Equipment & Fleet Maintenance for Salesforce.

 Salesforce isn't the provider of this listing and hasn't reviewed it. To understand how this affects security and trust, see the [Master Subscription Agreement](#).

* Username

jonathan.student21@mycompany.com

* First Name

Jonathan

* Last Name

Doe

Job Title

Plant Manager

* Email

jonathan.doe@mycompany.com

Phone

555-555-5555

* Company

My Company, Inc.

* Country

United States

* State/Province

California

* Salesforce.com Relationship

Prospective customer

☒ I have read and agree to the [terms and conditions](#).

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

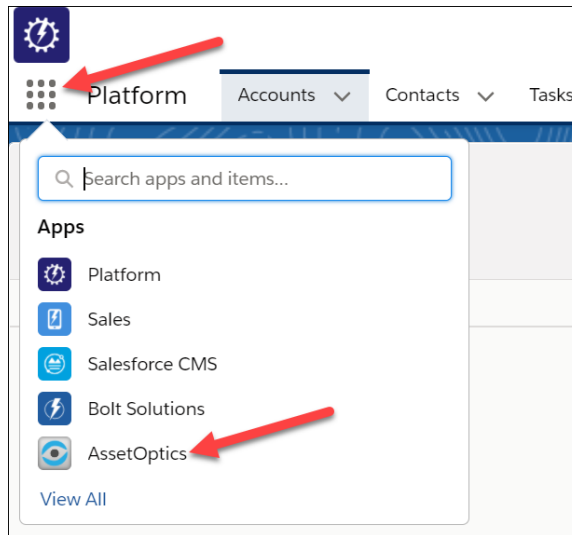
Cancel

Start Free Trial

5. Complete the form by clicking 'Start Free Trial.'
6. After a few minutes you will get a "Welcome to Salesforce: Verify your account" email. Click 'Verify My Account' to enter a new password and password reminder. (In the future, you can login either at the vanity URL provided in the email or from login.salesforce.com)

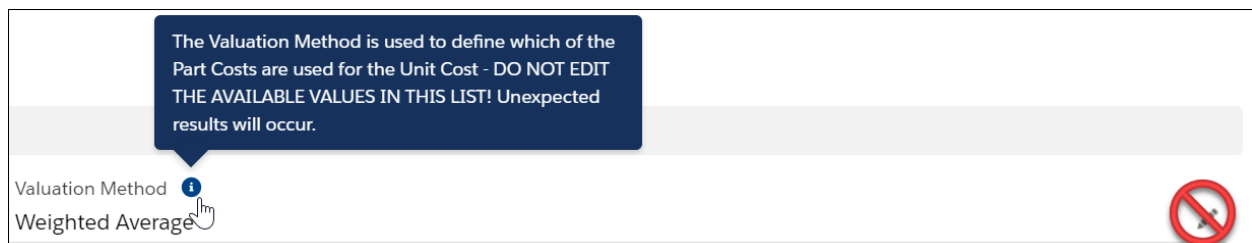
Logging in for the First Time

1. Click the application selector in the upper left-hand corner to reveal the menu of available apps and choose AssetOptics to get started.

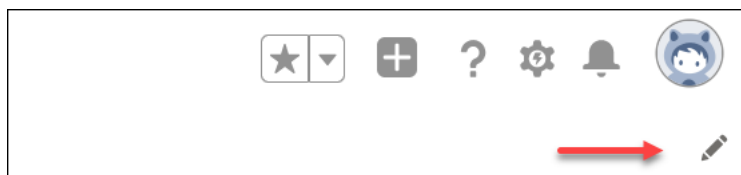


2. Launching AssetOptics for the first time you will arrive at your Home tab, which includes a sample Dashboard for Maint Supv (Maintenance Supervisor), which corresponds to one of the three standard profiles packaged with AssetOptics.

Note: Be aware that your actual user profile in this training org is System Administrator. As you complete your training exercises there will be times when this is useful (such as approving your own requests). Be cautious, however, not to edit or delete items without first reading the help fields.



3. Using AssetOptics for the first time you will need to setup your own Tabs. This enables each individual user to customize the app for his or her unique work needs.
4. Click on the Edit (pencil shaped) icon in the upper right-hand corner of the screen.



5. Click the button 'Add More Items.'

Edit AssetOptics App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#) ⓘ

NAVIGATION ITEMS (1)

Home

Reset Navigation to Default ⓘ

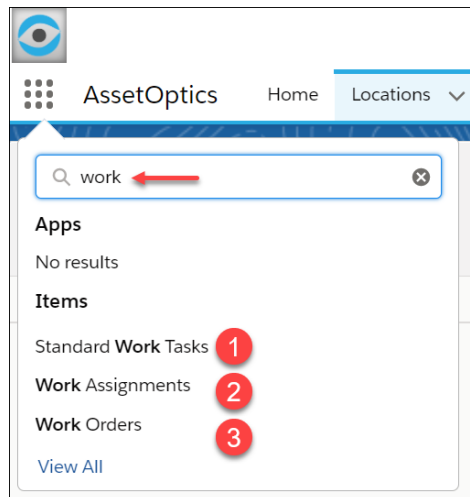
Cancel Save

6. Under 'Available Items' choose All. This will display the dozens (or potentially hundreds!) of navigation items associated with the Salesforce apps you are licensed to use.
7. For training purposes, we recommend you choose and save the following Tabs:
- Asset Groups
 - Bills of Materials
 - Equipment/Assets
 - Inventory Transactions
 - Item Master
 - Locations (* see below note)
 - Meters
 - PM Group Schedules
 - PM Routes
 - PM Schedules
 - Purchase Orders
 - Standard Work Tasks
 - Stock Items
 - Work Orders (* see below note)

Note: There will be two items labeled 'Locations' and two labeled 'Work Order.' In both instances, choose the second one, which should represent the AssetOptics custom object. Each will display as a blue icon (not green) in the application as pictured below. If you choose the wrong one you can always go back and change your selection.

Locations				
All Locations				
14 items • Sorted by Location ID • Filtered by All Locations • Updated a few seconds ago				
☐ Location ID ↑	Description	Parent Location	Parent Description	
1 ☐ Brewing Facility	Brewing Facility			
2 ☐ Cold Storage	Cold Storage	Brewing Facility	Brewing Facility	
3 ☐ Dry Storage	Dry Storage	Brewing Facility	Brewing Facility	
4 ☐ Fermentation	Fermentation	Brewing Facility	Brewing Facility	

The navigation items (Tabs) you just added are merely suggestions for the student user. As you go through the training exercises you may choose to add or remove Tabs at your discretion. For less frequently used Tabs you can always type the name of the item under the app launcher to launch the Tab. In the following example the search term “work” returns three possible choices.



Lastly, and as reminder to new Salesforce users, the default list view in Salesforce is ‘Recently Viewed.’ Since this is the first time you have logged into this org no “recent” items will display. As you navigate through the various Tabs select or pin the list view most appropriate for your needs.

You are now ready start learning!

