Way2Sell Installation Instructions

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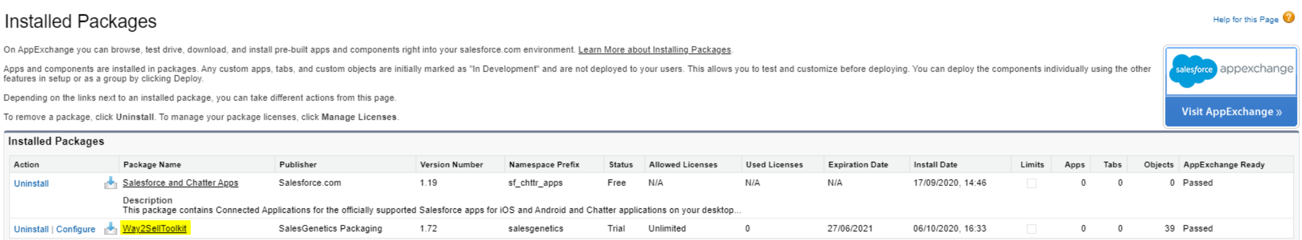
2. CONFIGURING THE PACKAGE

Once you have installed the package you will be navigated to the configuration page, where the package will full configure. However, if you are not automatically redirected then follow the steps below:

1. Navigate to **Setup**
2. In the quick find search for **Installed Packages**
3. On **Installed Packages** select **Configure** on the **Way2SellToolkit** package
4. This will fully configure the package ready for the steps below



3. POST INSTALL CREATION

In order to utilise the features of this tool, you need to permit access to the Salesforce Metadata API. A remote site is required for our code to call into the current Org (via the Metadata API). It does this to create and configure the ConnectedApps and the Permission Sets for the current Org.

By clicking **Install** the following will be created:

- RemoteSiteSettings: runrig_mdapi
- ConnectedApp: runrig_Main_CA
- ConnectedApp: runrig_Learning_CA
- ConnectedApp: runrig_Administration_CA

Click **Install**

4. Lightning Instructions

4.1 Adding the Way2Sell Application and Learning to your Page Layout

- Ensure you are operating in **Lightning Mode**
- Within the **Opportunities** section, open an existing opportunity
- Click the **Cog** icon at the top right, and choose **Edit Page**
- Within the **Lightning Components** toolbox on the left, scroll down and find **runrig** and **runrigLearning**
- Drag the **runrig** and **runrigLearning** components to where you would like them to be visible to your users
- We recommend a new tab is added for the application and learning applications, however please feel free to add wherever you feel is appropriate
- Click the **Save** button at the top right
- Click the **Back** button at the top right
- The application will now be available where you've chosen to add it

4.2 Adding the Way2Sell Admin Tools

- Ensure you are operating in **Lightning Mode**
- Within Setup navigate to **Platform Tools > User Interface > Tabs**
- Click the **New** button within the **Lightning Component Tabs** section
- Choose **runrigAdmin** from the **Lightning Component** dropdown list
- Enter a label and name for the admin tools
- Choose an appropriate tab style
- Click the **Next** button
- Choose which profiles you wish to have visibility of the Admin Tools tab
- Click the **Save** button
- The Admin Tools will now be available as a new tab within the non-Setup mode of operation

4.3 Adding the User Licence Field

- Ensure you are operating in **Lightning Mode**
- Within Setup navigate to **Object Manager > User > User Page Layouts > User Layout**

- Drag the **Way2Sell Opportunity Licence** field into the **Additional Information** section.
- Click the **Save** button.
- The field will now be available when editing a User*

* NOTE: There may be a delay. See Salesforce winter '20 Release Notes

4.4 Assigning Permission Sets

- Ensure you are operating in **Lightning Mode**
- From Setup, enter Users in the Quick Find box, then select Users.
- Select a user.
- In the Permission Set Assignments related list, click Edit Assignments.
- To assign a permission set, select it under Available Permission Sets and click Add. To remove a permission set assignment, select it under Enabled Permission Sets and click Remove.
- Click Save.

* NOTE: Permission Sets are automatically crested by the post install scripts

5. Classic Instructions

5.1 Adding the Way2Sell Application and Learning to your Page Layout

- Ensure you are operating in **Classic Mode**
- Within the **Opportunities** section, open an existing opportunity
- Click the **Edit Layout** link at the top right
- Within the **Opportunity Layout** toolbox at the top, scroll down and find **Visualforce Pages**
- Drag the **runrig** and **runrig Learning** components to where you would like them to be visible to your users
- Click the **Save** button at the top left
- The application will now be available where you've chosen to add it

5.2 Adding the Way2Sell Admin Tools

- Ensure you are operating in **Classic Mode**
- Within Setup navigate to **Build > Create > Tabs**
- Click the **New** button within the **Visualforce Tabs** section
- Choose **runrigAdmin** from the **Visualforce Page** dropdown list
- Enter a label and name for the admin tools
- Choose an appropriate tab style
- Click the **Next** button
- Choose which profiles you wish to have visibility of the Admin Tools tab
- Click the **Save** button
- The Admin Tools will now be available as a new tab within the non-Setup mode of operation

5.3 Adding the User Licence Field

- Ensure you are operating in **Classic Mode**
- Within Setup navigate to **Build > Customize > Users > Page Layouts**
- Click the **Edit** button for **User Layout**
- Drag the **Way2Sell Opportunity Licence** field into the **Additional Information** section.
- Click the **Save** button.
- The field will now be available when editing a User*

* NOTE: There may be a delay. See Salesforce winter '20 Release Notes

5.4 Assigning Permission Sets

- Ensure you are operating in **Classic Mode**
- From Setup, enter Users in the Quick Find box, then select Users.
- Select a user.
- In the Permission Set Assignments related list, click Edit Assignments.
- To assign a permission set, select it under Available Permission Sets and click Add. To remove a permission set assignment, select it under Enabled Permission Sets and click Remove.
- Click Save.

*NOTE: Permission Sets are automatically crested by the post install scripts

6. Known Issues - Firefox

There is a known issue with Firefox displaying the Admin Tools within Classic mode. The issue exhibits itself by the Admin Tools not loading and either displaying a blank page org simply showing you the loading indicator. The cause of this issue is due to Firefox having Enhanced Tracking Protection and is blocking required Salesforce functionality.

To resolve the issue it is required to disable the Enhanced Tracking Protection. To do this please see the instructions at the following LINK and follow the steps in the "Enable third-party cookies for specific sites" section.