



How to install Tok in your Salesforce org

You are just 9 steps away from secure, real-time team chat.

VersionTok / 1.185.0



Powered by  oktana

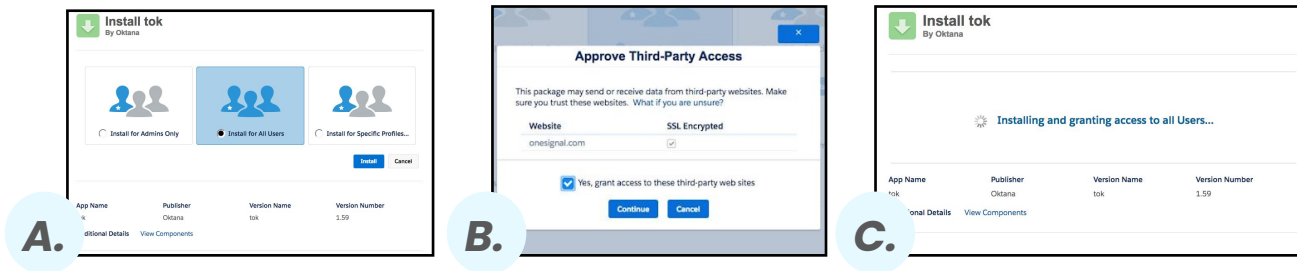
Step 1.

Go to [Tok on the AppExchange](#) and click “Get It Now.”
Please note that you must be an Admin to install.

Step 2.

To install the package, you will be given a few options.
Follow this path:

- A. Install for all users.*
- B. Yes, grant access to these third-party websites*
- C. Continue*



Step 3.

Once the package is installed, it's time to setup your permissions. On the left, you will see the settings sidebar. Place your mouse on **Administer** and select the **Manage Users** dropdown. Select **Permissions Set**. You will see a list of labels.

Step 4.



Once you see the list of labels, hover on **TokPermission** and click on **Clone** which is placed below the action column.

The screenshot shows the Salesforce Admin console interface. On the left, the 'Administer' sidebar is expanded, and the 'Manage Users' dropdown menu is open. The 'Permission Sets' option is highlighted. On the right, the 'Permission Sets' page is displayed. It includes a search bar, 'Expand All' and 'Collapse All' links, and a table of permission sets. The table has two columns: 'Action' and 'Permission Set Label'. The 'TokPermission' label is highlighted with a red circle, and the 'Clone' link below it is also highlighted with a red circle. A blue line with dots at both ends connects the 'Manage Users' dropdown in the sidebar to the 'Clone' link in the table.

Action	Permission Set Label ↑
Clone	TokAdmin
Clone	TokPermission

Step 5.

Enter **Label**, **API Name**, and **Description**.
When done, click **Save**.

Quick Find / Search...  

[Expand All](#) | [Collapse All](#)

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- ☒ **Manage Users**
 - Users
 - Adoption Manager
 - Mass Email Users
 - Roles
- [Permission Sets](#)
- Profiles
- Public Groups

Permission Set
Clone: TokPermission2

Enter a new label and description for the cloned permission set.


Save Cancel

Enter permission set information

LabelTokPermission2

API NameTokPermission2

Description

Session Activation Required☐ 

LicenseCustomer Community

Save Cancel

Step 6.

Click your recently created permission set in the list (if you don't see any list, click the **Permission Sets** button). Then, scroll down until you find the system section and click **System Permissions**.

The screenshot shows the Salesforce 'Permission Set' configuration page for 'TokPermission2'. On the left is a navigation sidebar with a search bar and a list of categories: Lightning Experience, Salesforce1 Quick Start, Force.com Home, and Administrator. Under Administrator, 'Manage Users' is expanded, showing options like Users, Adoption Manager, Mass Email Users, Roles, Profiles, Public Groups, Queues, Login History, and Identity Verification History. Below these is a list of sub-categories, including 'Manage Apps', 'Manage Territories', 'Company Profile', 'Security Controls', 'Domain Management', 'Communication Templates', 'Translation Workbench', 'Data Management', 'Mobile Administration', 'Desktop Administration', 'Lightning for Outlook', 'Lightning Sync', 'Email Administration', 'Google Apps', and 'Data.com Administration'. The main content area has a top bar with a search bar, 'Clone', and 'Manage Assignments' buttons. Below this is the 'Permission Set Overview' section, which includes fields for Description, License, Session Activation Required, Created By, and Last Modified By. The 'Apps' section follows, listing various settings like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, and Custom Permissions. At the bottom, the 'System' section is visible, with 'System Permissions' highlighted by a red circle. The sidebar also includes a 'Quick Find / Search...' bar and 'Expand All / Collapse All' links.

Quick Find / Search... [Expand All](#) | [Collapse All](#)

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administrator

- Manage Users
 - Users
 - Adoption Manager
 - Mass Email Users
 - Roles
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Login History
 - Identity Verification History
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook
- Lightning Sync
- Email Administration
- Google Apps
- Data.com Administration

Permission Set
TokPermission2

Find Settings... Clone Manage Assignments

Permission Set Overview

Description	API Name	OktaChatterForDesktop
License	Namespace Prefix	okta_desktop
Session Activation Required		
Created By	at@us	12/20/2016 7:33 AM
Last Modified By	at@us	12/20/2016 7:33 AM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com [Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

System

Settings that apply across all apps, such as record and user management [Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

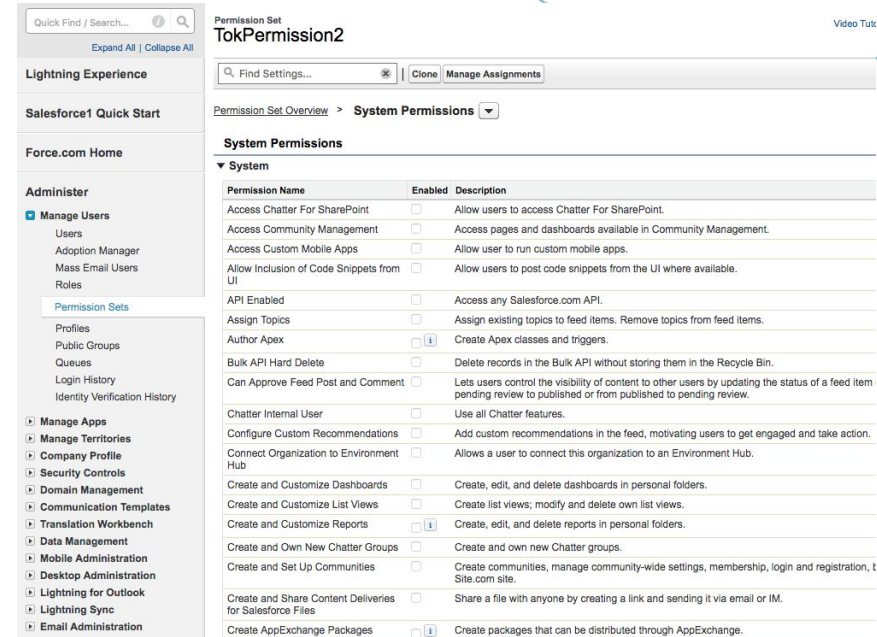


Step 7.

You will see a large list. Click the **Edit Button** and then **select the following six permissions**:

- Apex REST Services
- API Enabled
- Create and Own New Chatter Groups
- Edit My Own Posts
- Moderate Community Feeds*
- Select Files From Salesforce

Finally, click **Save**.



The screenshot shows the Salesforce interface for configuring a Permission Set named 'TokPermission2'. The left sidebar contains navigation links for 'Lightning Experience', 'Salesforce1 Quick Start', 'Force.com Home', and 'Administer'. Under 'Administer', 'Manage Users' is selected, showing a list of users. The main content area displays the 'System Permissions' for the selected permission set. A table lists various permissions, each with an 'Enabled' checkbox and a 'Description'.

Permission Name	Enabled	Description
Access Chatter For SharePoint	<input type="checkbox"/>	Allow users to access Chatter For SharePoint.
Access Community Management	<input type="checkbox"/>	Access pages and dashboards available in Community Management.
Access Custom Mobile Apps	<input type="checkbox"/>	Allow user to run custom mobile apps.
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>	Allow users to post code snippets from the UI where available.
API Enabled	<input type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Author Apex	<input checked="" type="checkbox"/>	Create Apex classes and triggers.
Bulk API Hard Delete	<input type="checkbox"/>	Delete records in the Bulk API without storing them in the Recycle Bin.
Can Approve Feed Post and Comment	<input type="checkbox"/>	Lets users control the visibility of content to other users by updating the status of a feed item pending review to published or from published to pending review.
Chatter Internal User	<input type="checkbox"/>	Use all Chatter features.
Configure Custom Recommendations	<input type="checkbox"/>	Add custom recommendations in the feed, motivating users to get engaged and take action.
Connect Organization to Environment Hub	<input type="checkbox"/>	Allows a user to connect this organization to an Environment Hub.
Create and Customize Dashboards	<input type="checkbox"/>	Create, edit, and delete dashboards in personal folders.
Create and Customize List Views	<input type="checkbox"/>	Create list views; modify and delete own list views.
Create and Customize Reports	<input checked="" type="checkbox"/>	Create, edit, and delete reports in personal folders.
Create and Own New Chatter Groups	<input type="checkbox"/>	Create and own new Chatter groups.
Create and Set Up Communities	<input type="checkbox"/>	Create communities, manage community-wide settings, membership, login and registration, & Site.com site.
Create and Share Content Deliveries for Salesforce Files	<input type="checkbox"/>	Share a file with anyone by creating a link and sending it via email or IM.
Create AppExchange Packages	<input checked="" type="checkbox"/>	Create packages that can be distributed through AppExchange.

*if this option does not appear, enable communities in your org

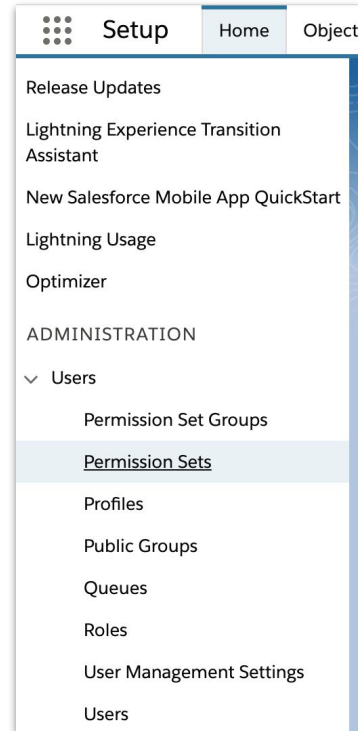
Step 8.

Now, it's time to assign users to both of your Tok Permission sets. This is your path:

- **Permission Sets**
- **TokPermission/TokPemiission2***
- **Manage Assignments**
- **Add Assignments** (add any user that will use Tok in your Org).

Then, click **Save**.

**Remember you have now two permission sets (the one installed in the package, and the other you cloned in the step 3). You need to assign permissions to both of them.*



Step 8.

a. 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 users.

All Permission Sets [Edit](#) [Delete](#) [Create New View](#)

[New](#) [?](#)

Action	Permission Set Label
<input type="checkbox"/> Del Clone	TokPermission2
<input type="checkbox"/> Clone	TokPermission
<input type="checkbox"/> Clone	TokBotServicesTab
<input type="checkbox"/> Clone	TokAdmin
<input type="checkbox"/> Clone	Standard Einstein Activity Capture
<input type="checkbox"/> Clone	Service Cloud User
<input type="checkbox"/> Clone	Security Center Integration User
<input type="checkbox"/> Clone	Salesforce Console User

b.

SETUP **Permission Sets**

Permission Set
TokPermission

[Clone](#) [Manage Assignments](#)

Permission Set Overview

Description
License
Session Activation Required <input type="checkbox"/>
Last Modified By Diego Hernández 7/1/2021 15:34

c.

SETUP **Permission Sets**

Assigned Users
TokPermission

[Back to: Permission Set](#)

Action	Full Name	Alias	Username
<input type="checkbox"/> Edit	Hernández, Diego	DHern	diego2601@oktana.com

[Add Assignments](#)

d.

Assign Users
All Users

View: [All Users](#) [Edit](#) [Create New View](#)

[Assign](#) [Cancel](#)

Action	Full Name	Alias	Username
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d4x0000000juizeac.x5imuwyyawm7p6
<input type="checkbox"/> Edit	Hernández, Diego	DHern	diego2601@oktana.com
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d4x0000000juizeac.com
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d4x0000000juizeac.com

[Assign](#) [Cancel](#)

Step 9.

Congratulations!
You've successfully installed Tok!

Now it's time to create your community so you can enjoy real-time communications. You will find detailed instructions in our [Resource Center](#).



Thank you for using Tok

If you need any support or if you are looking for extra information, please contact us. We are always please to help.

www.oktana.com/tok/

tok@oktana.com

(415) 449-7550

