Direct Connect

INSTALLATION & CONFIGURATION GUIDE

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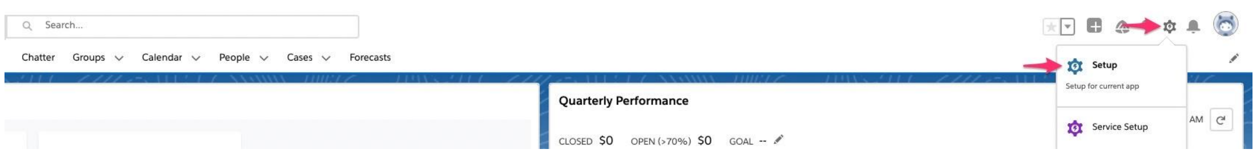
Introduction

This document serves as a configuration guide for the Direct Connect powered by SPLICE Software Salesforce app. The first section covers the installation of the package. The following sections will walk you through completing Setup Assistant and configuring a process or flow with the invocable method provided. This guide is meant to walk you through configuring your org in a Lightning Experience environment.

Throughout this guide, you will be instructed to navigate through Setup. To do so, you will need to select on the Setup cog in the upper right and then select Setup. Once in Setup, you may use the Quick Find search tool to find and navigate to the appropriate sections.

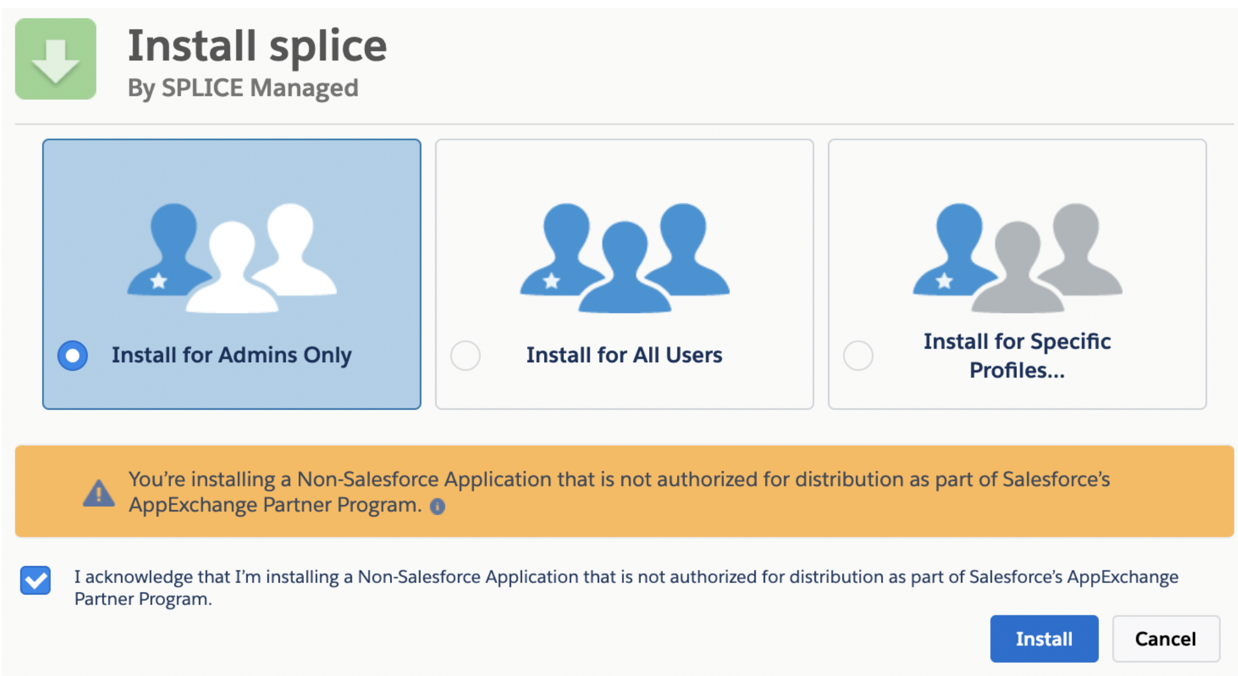


Installation

Installing the Direct Connect Package

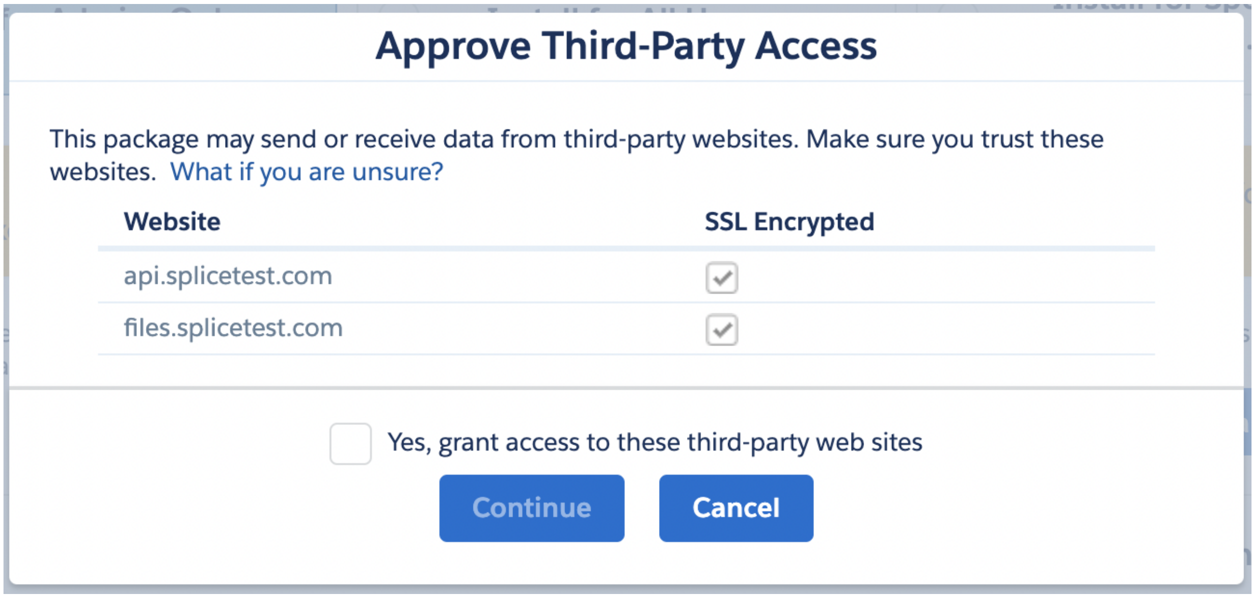
Copy and paste the package install URL into the address bar for your browser of choice (please contact your administrator for the package link.) If you are not already logged into the org you wish to install the package into, Salesforce will prompt you to log in before installing begins.

- **Install for Admins Only** is the recommended option - this option allows for controlling access and permissions after the package has been installed.



For further information, [please select here to refer to salesforce documentation on Package Installations](#).

- **Approve Third-Party Access** - check off the box and select **Continue** to start the package installation when the modal appears. As it states, this is to allow data to be sent back and forth between your Salesforce org and Splice Software.

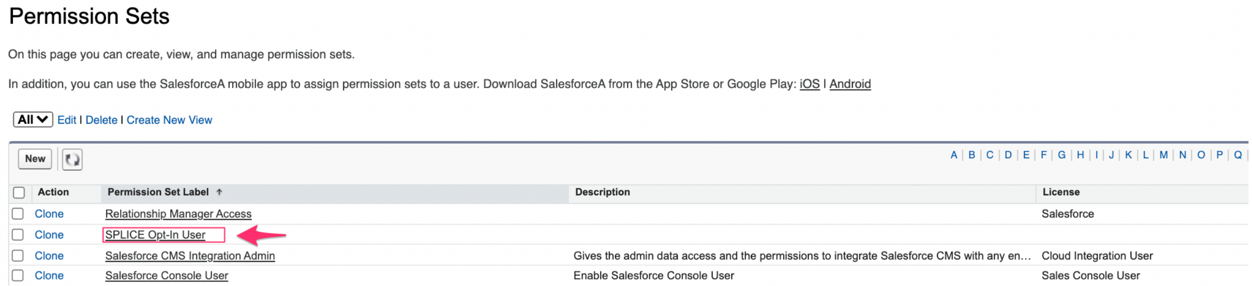


Direct Connect Configuration

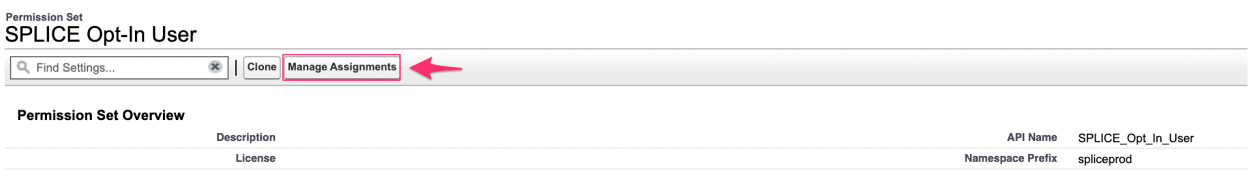
Permission Sets

The package includes the **SPLICE Opt-in User** permission set that can be assigned to any standard user to grant access to see the Opt-ins tab . To assign the permission set to users, navigate to **Setup > User > Permission Sets**

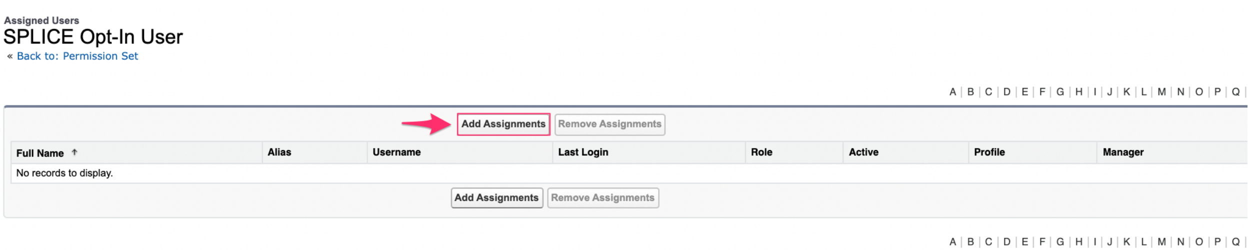
- Select the **SPLICE Opt-in User** permission set



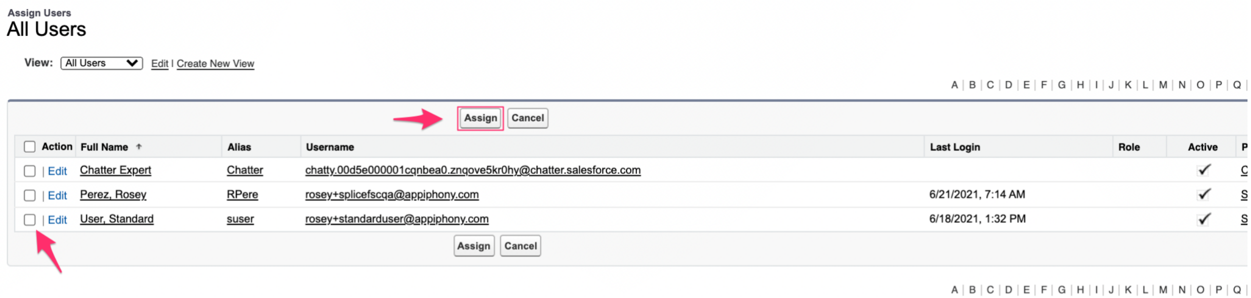
- From the Permission Set Overview page, select **Manage Assignments**



- Select **Add Assignments**

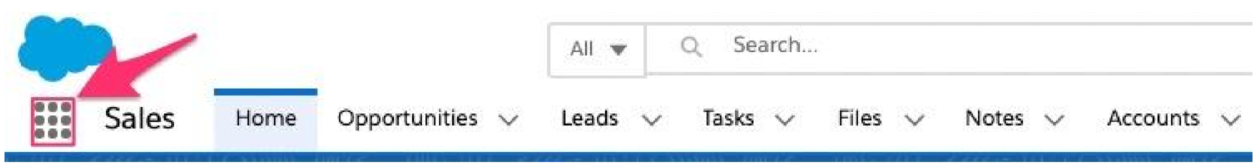


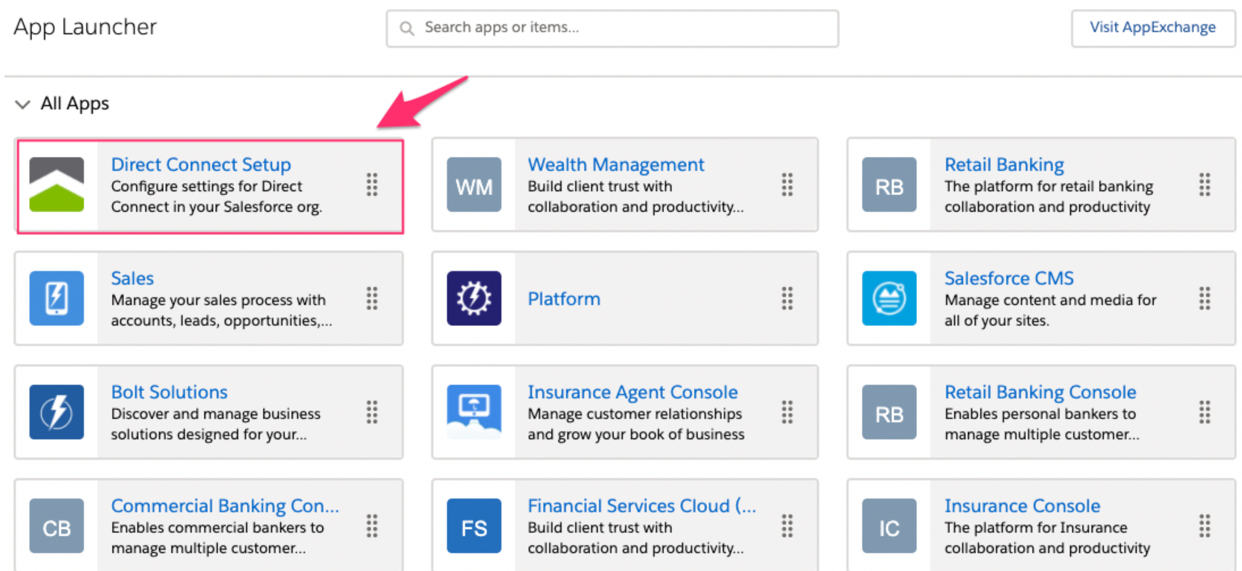
- Check the box next to the user(s) that you would like to assign the permission set to and click **Assign**



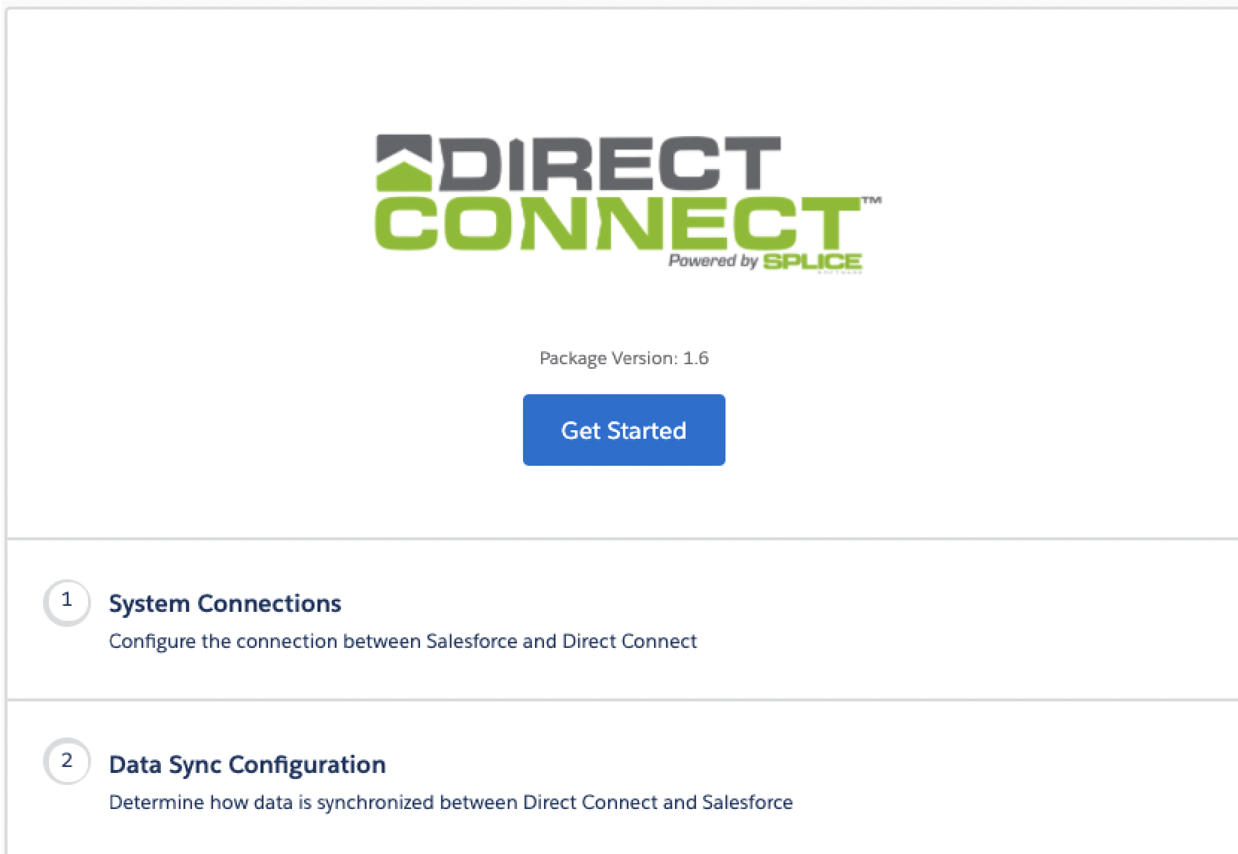
Direct Connect Setup - System Connections

The Direct Connect Setup Assistant will need to be completed to connect your Salesforce org to the Direct Connect app in order to complete inbound and outbound syncing of opt-in data. To start System Connections, navigate to **App Launcher > Direct Connect Setup**

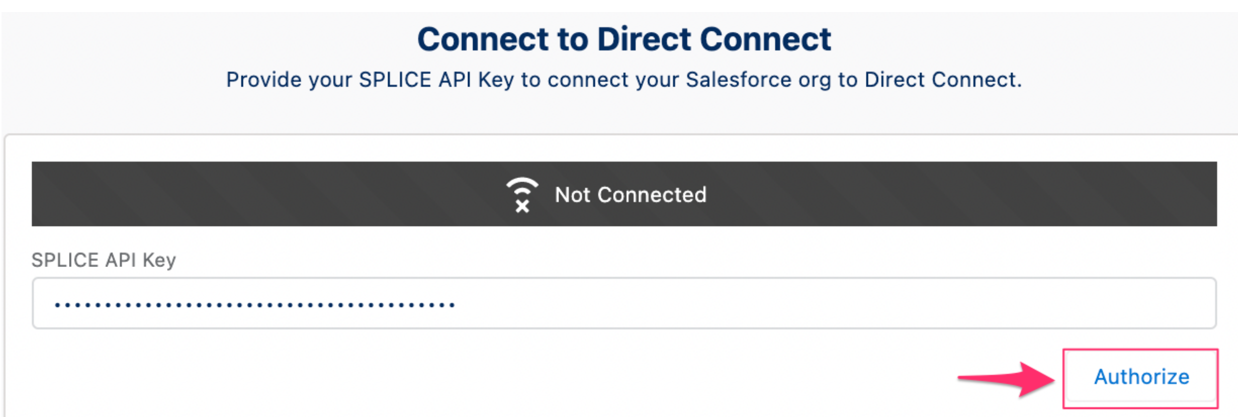




- Select the **Get Started** button



- Complete the SPLICE API Key field - you can get this information by contacting SPLICE Software at partners@splicesoftware.com
- Select the **Authorize** button

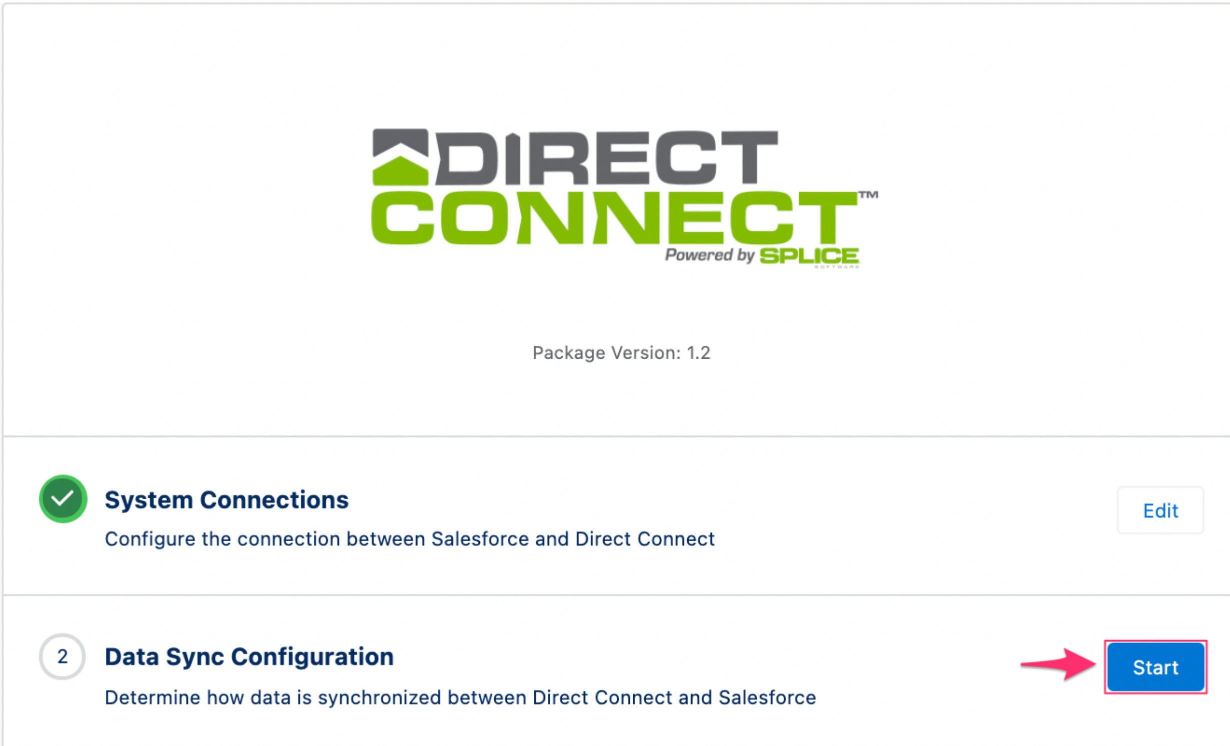


- Select the **Next** button
- Select the hyperlink for Process Builder or the hyperlink for Flows in order to set up the invocable method
- Once finished creating the process or flow, select the **Finish** button on the informational step
-

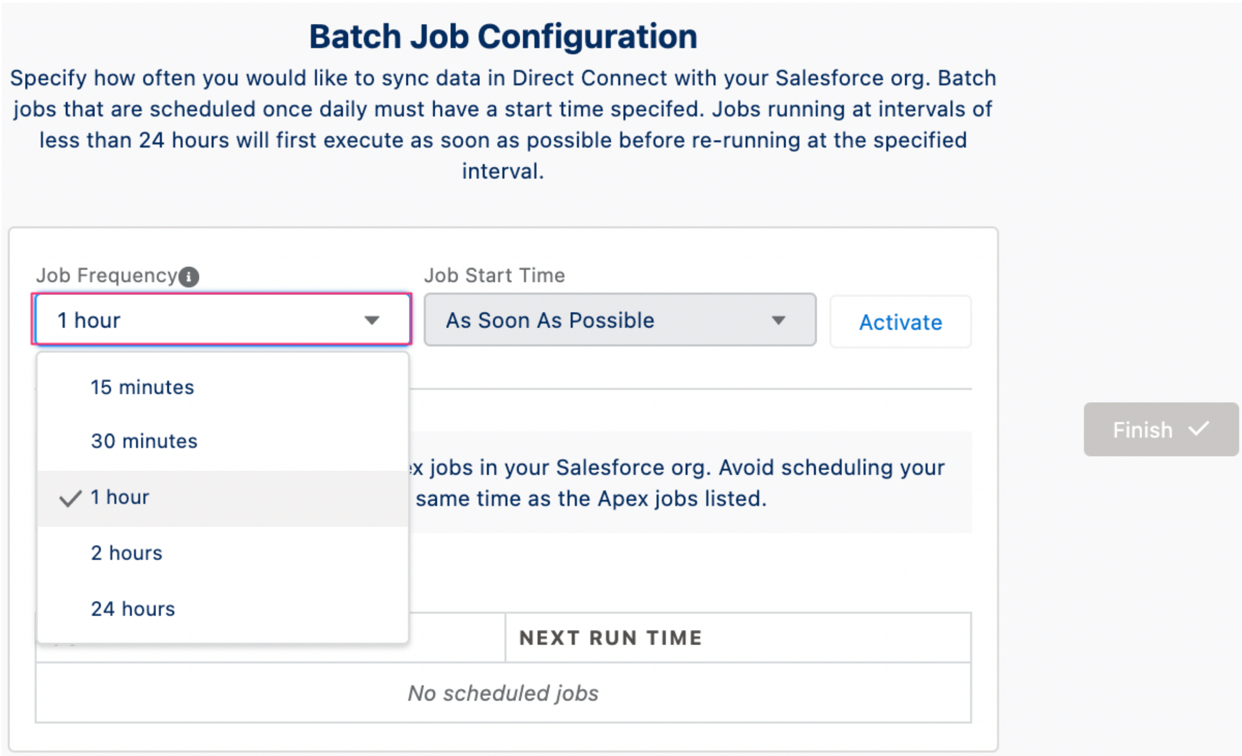
Direct Connect Setup - Data Sync Configuration

The second step in the Direct Connect Setup app is Data Sync Configuration. To complete this step the System Administrator will need to schedule a batch job from the Direct Connect Setup app. The batch scheduler has the option to schedule a job every 15 minutes, 30 minutes, 1 hour, 2 hours, and 24 hours. If the system administrator selects the batch to run every 24 hours, they will also be required to set a start time. Best practice is to schedule the start time early in the morning or late at night, i.e. 4 AM or 11 PM. Once the batch is scheduled, a batch job will run at the chosen time interval and pull opt-in data from SPLICE Software into the Salesforce org to keep track of each contact's opt-in decision.

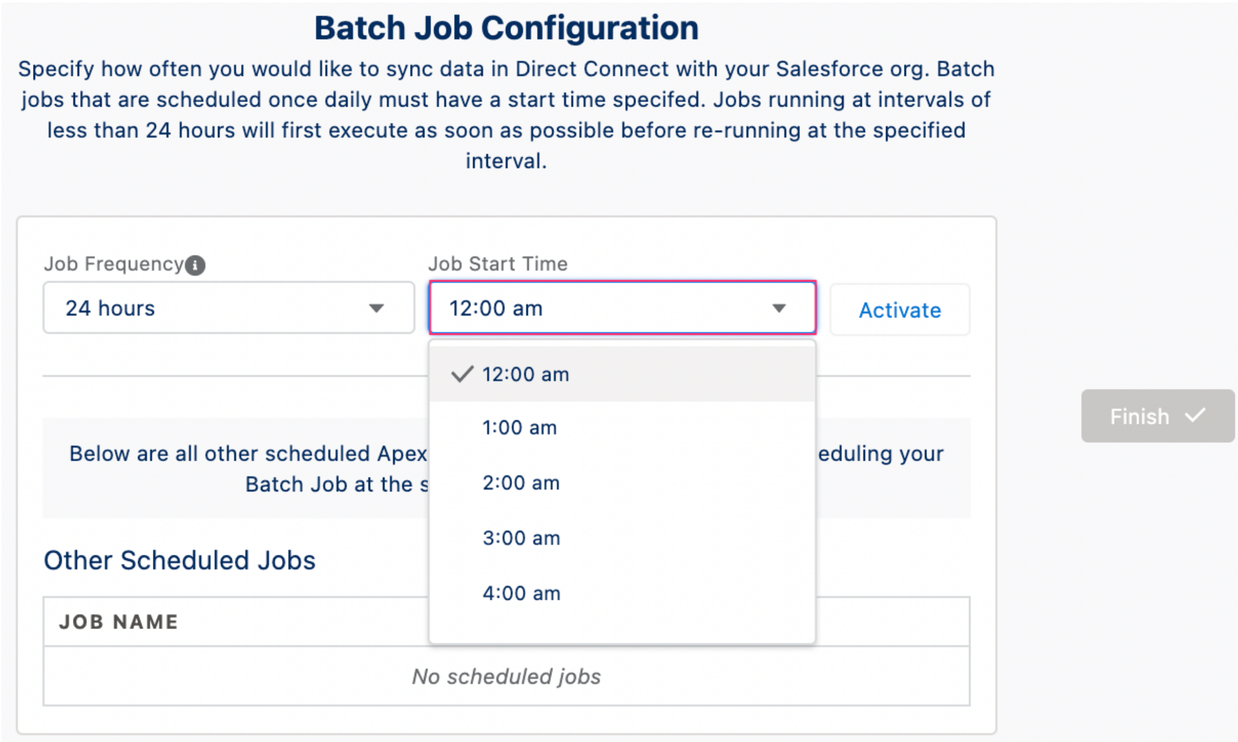
- Select the **Start** button to begin the Data Sync Configuration step



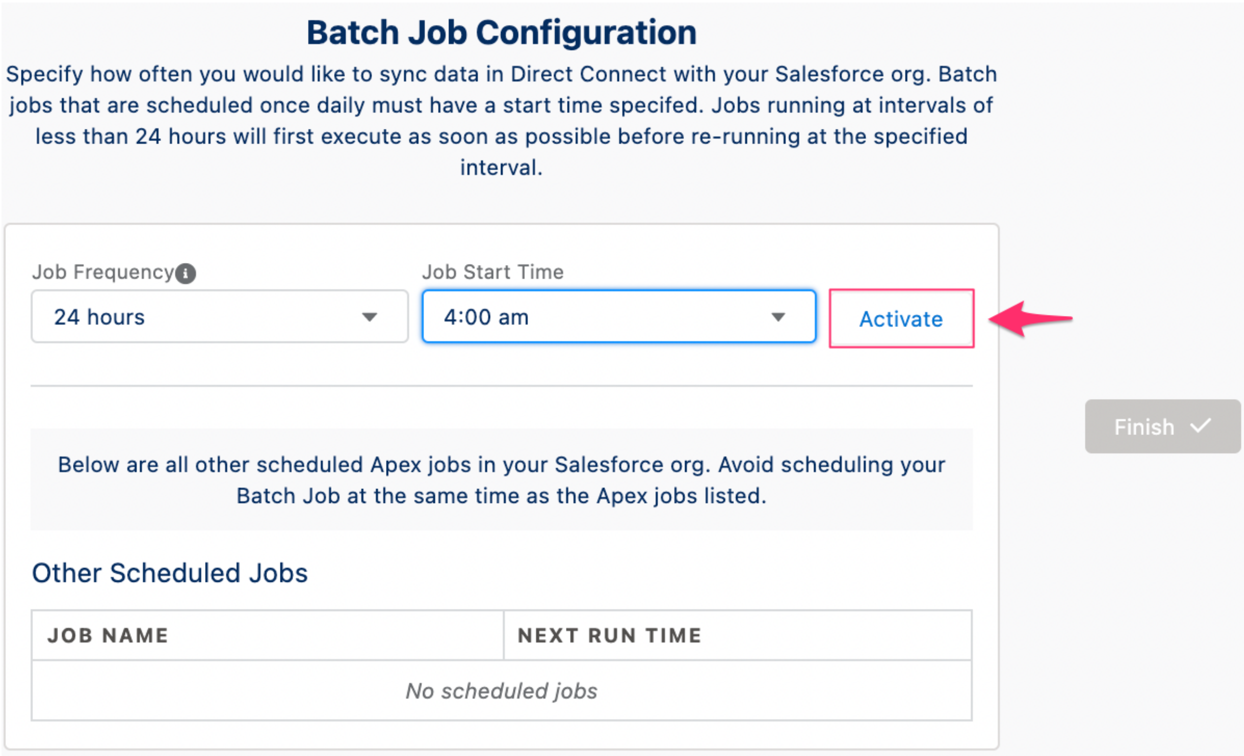
- Select the desired job frequency from the dropdown list
  - Note the available job frequencies for the batch scheduler are:
    - 15 minutes
    - 30 minutes
    - 1 hour
    - 2 hours
    - 24 hours

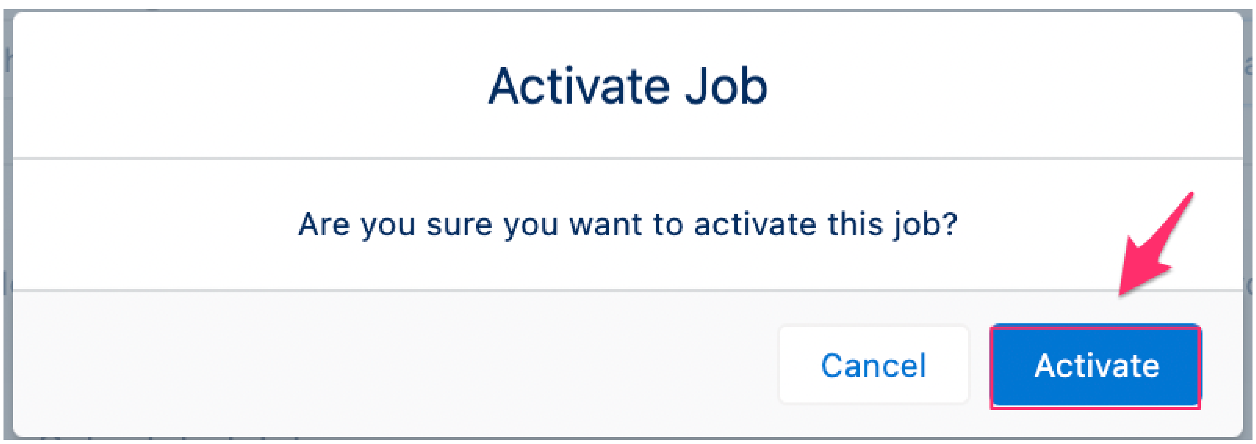


- If the job frequency is 24 hours, a start time will also need to be selected from the job start time dropdown list
  - Note start times range from 12 AM - 11 PM and run on the hour

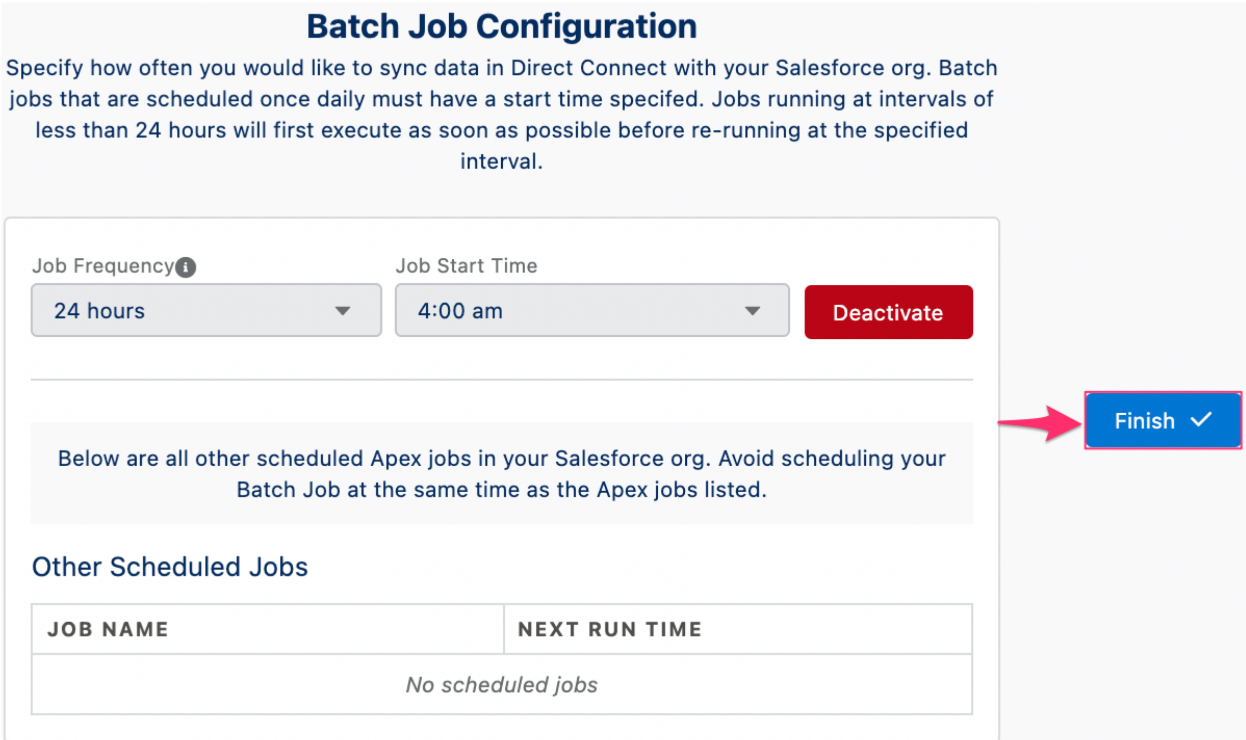


- Select the **Activate** button to schedule the batch job for selected job frequency and start time
- Select the **Activate** button again when the activate job modal pops up





- Select the Finish button to complete the Data Sync Configuration step



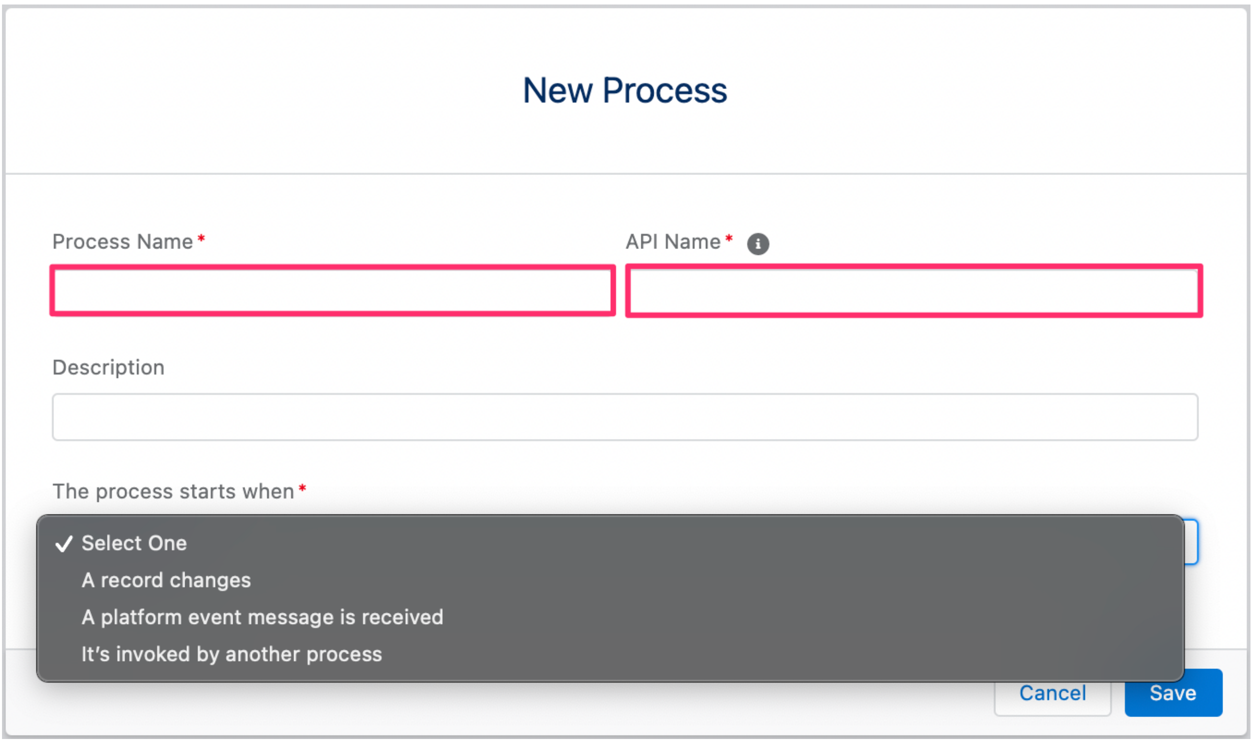
Adding Invocable Method to Process Automation

Configuring a Process with Invocable Method

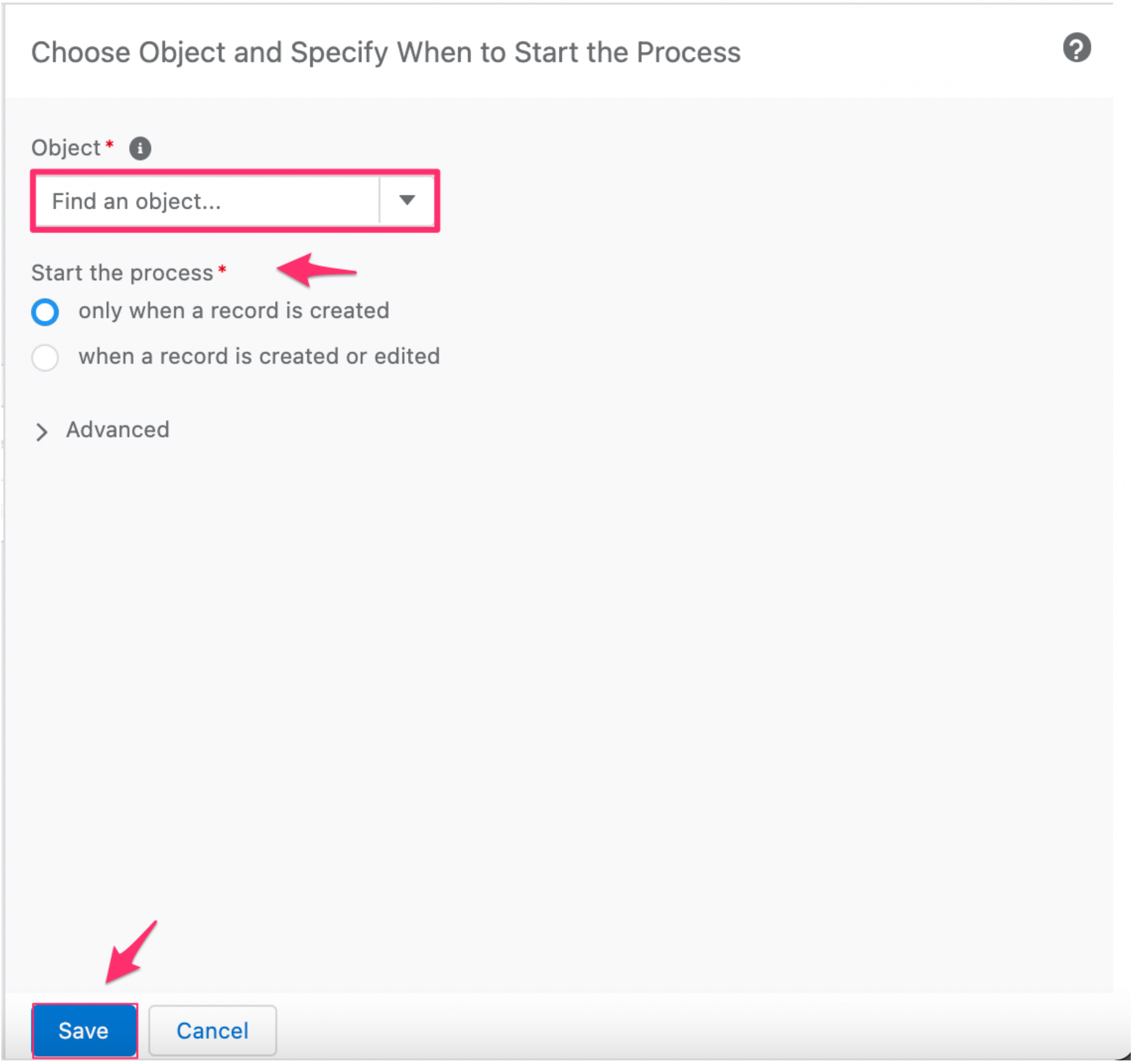
In order for Direct Connect to properly keep track of opt-in decisions for each contact, the setup assistant allows you to build a process using an invocable method. The invocable method may be used with any object. Once the process is triggered, the invocable method accepts an email, phone number or both and pushes the data to SPLICE Software. Once the process executes, the invocable method will store records in the chosen Salesforce object and create opt-in records for each email and phone number in the Opt Ins custom object.

Navigate to **Setup** > **Process Automation** > **Process Builder**

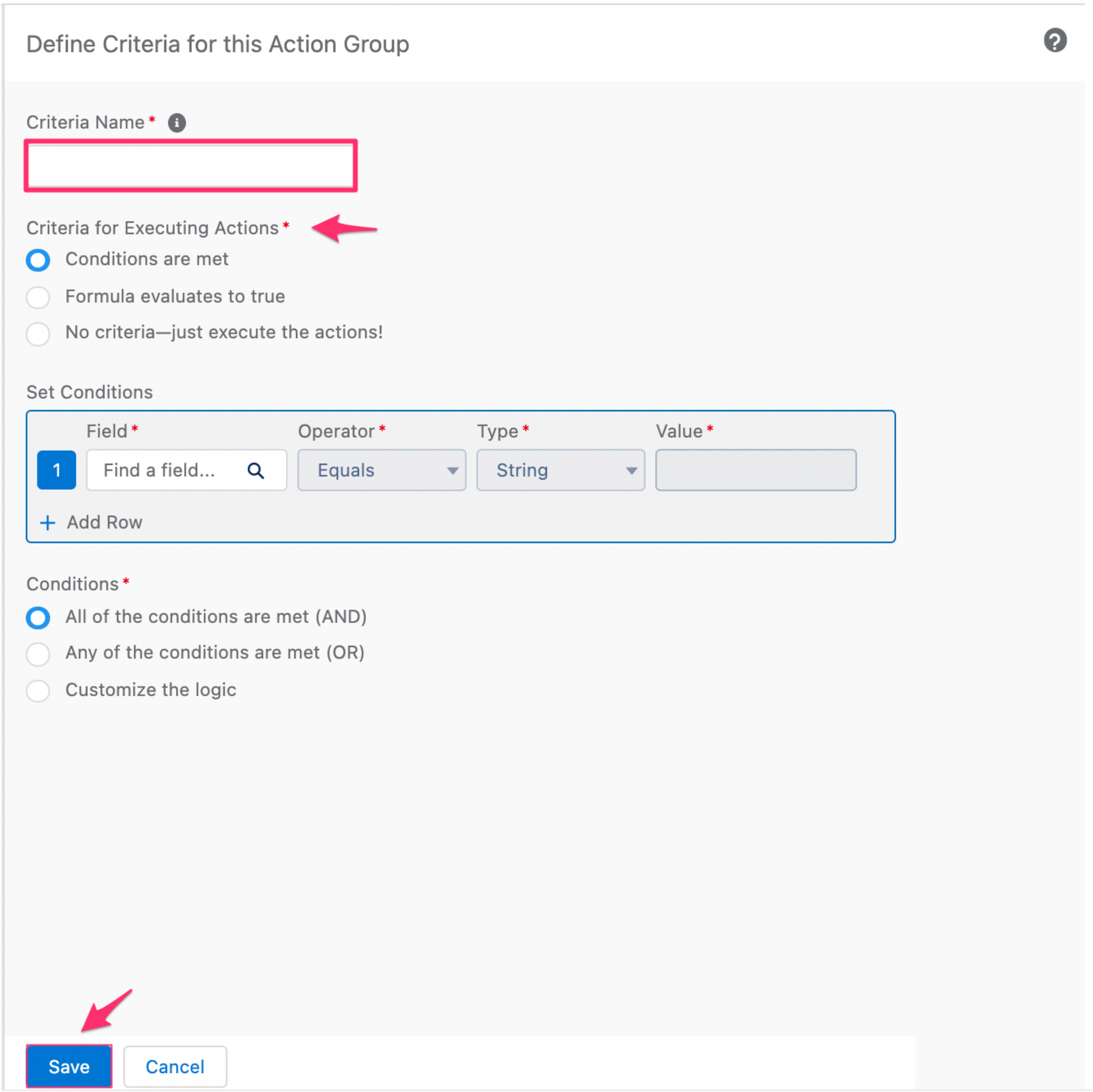
- Select the **New** button to create a new process
    - Give the new process a name, description, and select an option from the dropdown menu for when the process should start
    - Select the **Save** button to begin configuring the process



- Select the Add Object element
    - Choose any object and define when the process will be triggered
    - Select the **Save** button

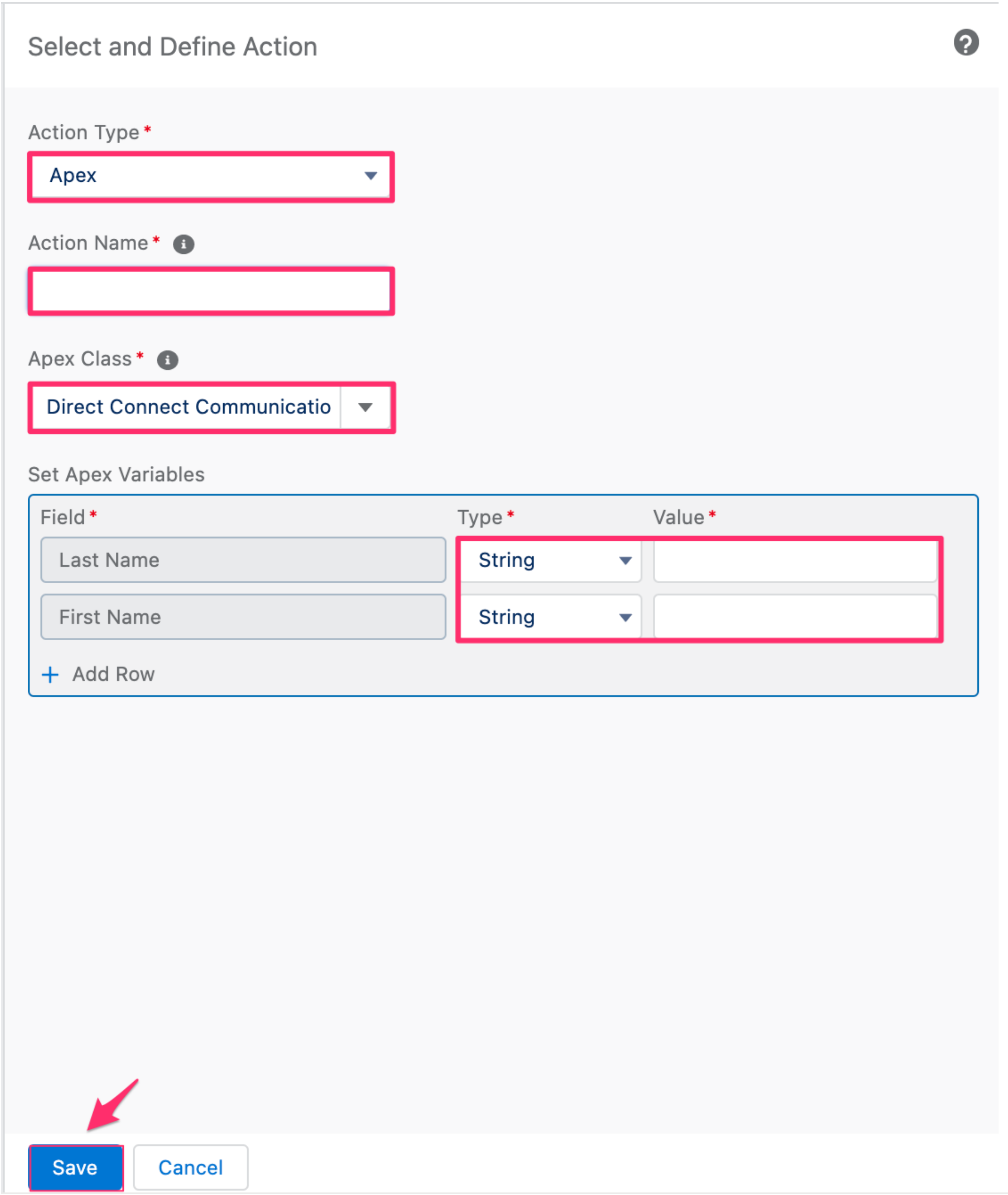


- Select the Add Criteria element
    - Set the criteria for executing the actions
    - Select the **Save** button



- Select the Add an action element
    - To add the invocable method, select apex as the action type

- Give the action a descriptive name
- Select Direct Connect Communication Opt In as the Apex Class
- Fill in the type and value fields
- Select the **Save** button


Select and Define Action
Action Type *
Apex
Action Name *
Apex Class *
Direct Connect Communicatio
Set Apex Variables
Field *
Type *
Value *
Last Name
String
First Name
String
Add Row
Save
Cancel

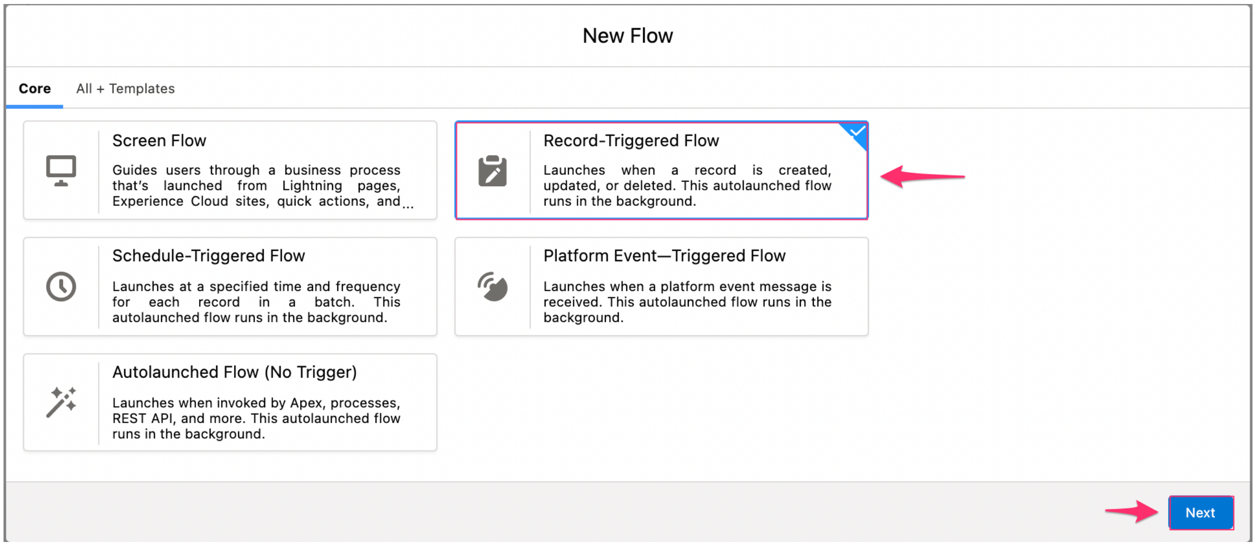
- In the top right hand corner, select the **Save** button
- Once the process is saved, select the **Activate** button to activate the process
- The process will now run automatically according to the conditions set

Configuring a Flow with Invocable Method

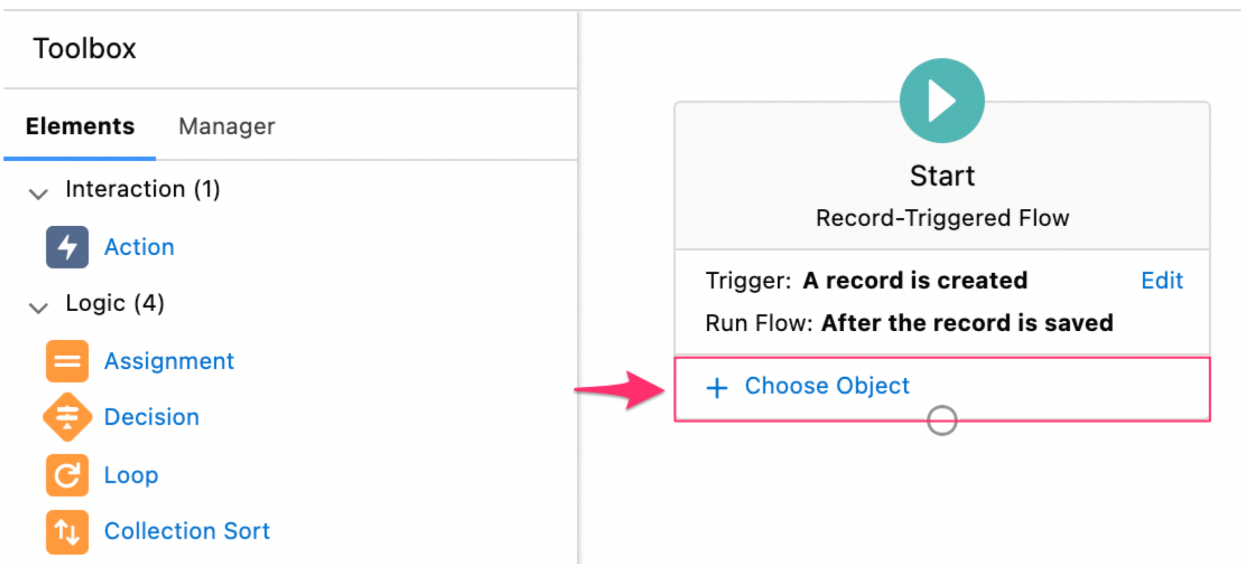
In order for Direct Connect to properly keep track of opt-in decisions for each contact, the setup assistant allows you to also build a flow using an invocable method. The invocable method may be used with any object. Once the process is triggered, the invocable method accepts an email, phone number or both and pushes the data to SPLICE Software. To set up the flow, create a record-triggered flow and select any object to start. The Direct Connect Communication Opt-in method can be added to the flow by adding an action and selecting it from the apex actions list. Once the process executes, the invocable method will store records in the chosen Salesforce object and create opt-in records for each email and phone number in the Opt Ins custom object.

Navigate to **Setup > Process Automation > Flows**

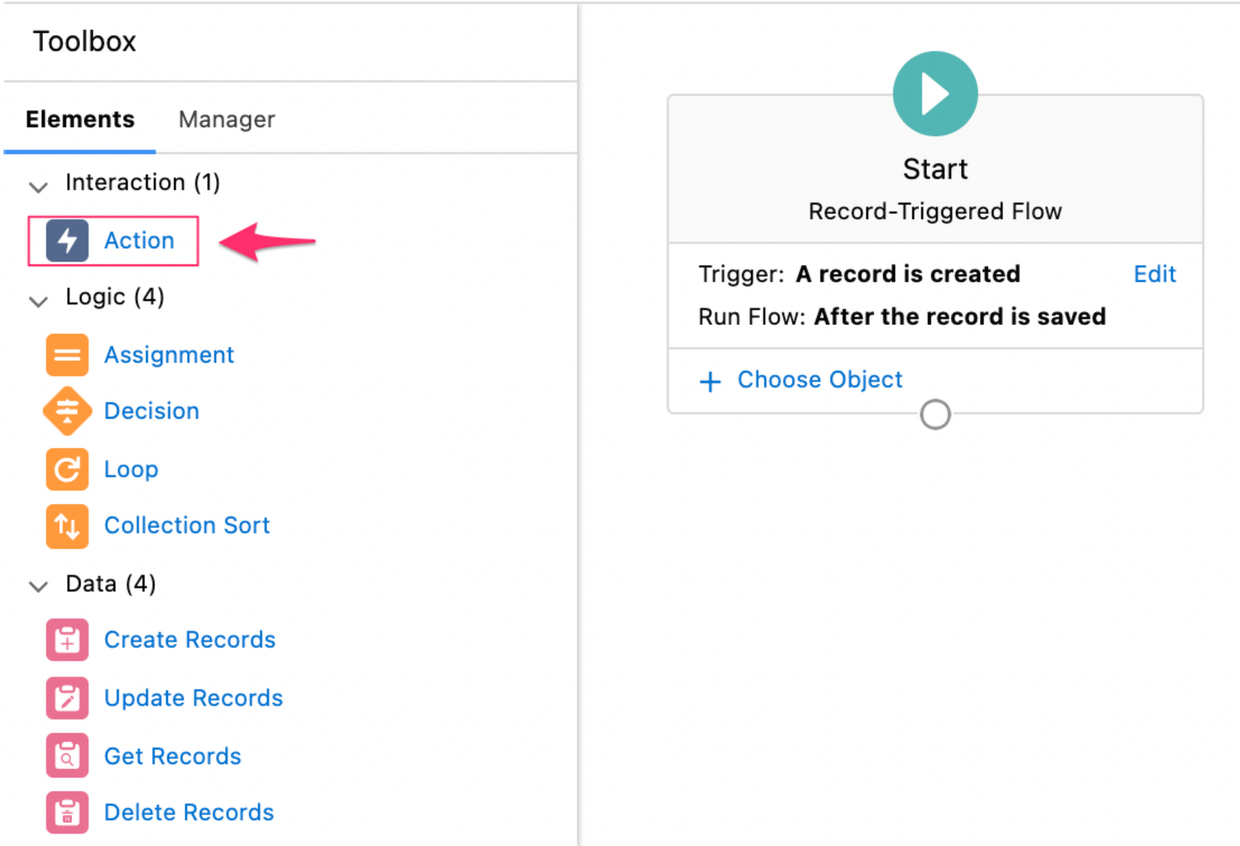
- Create a new Flow
- Select Record-Triggered Flow



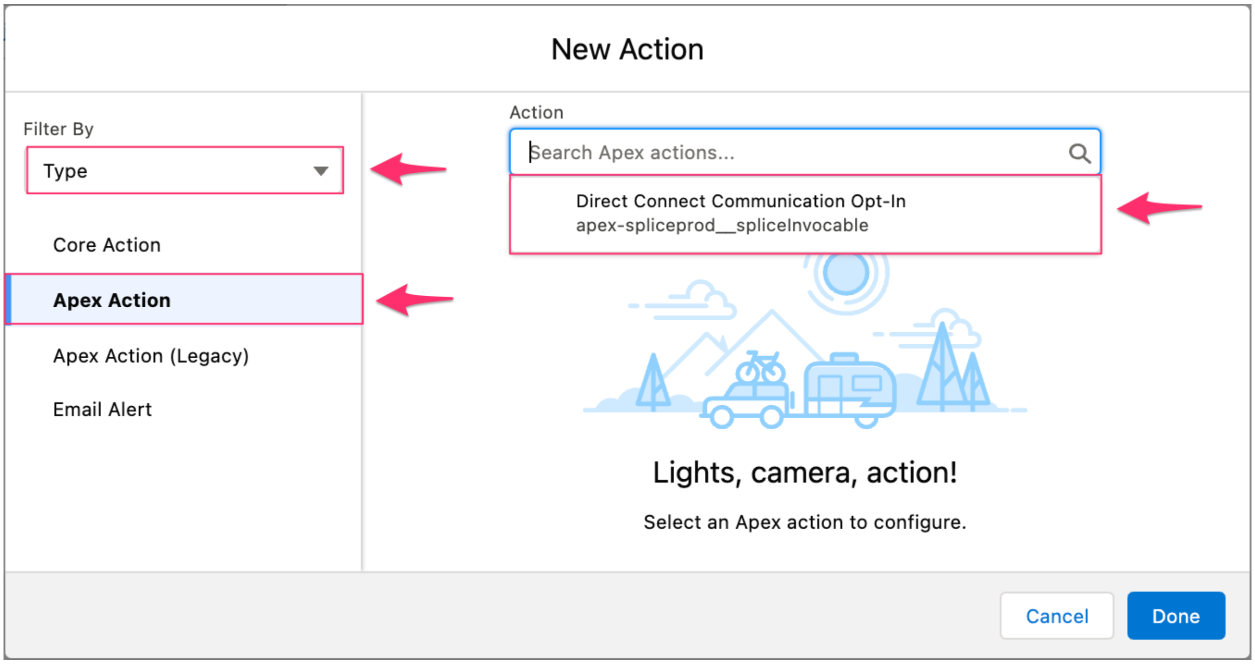
- Select any object and define when the process will be triggered
    - I.e. trigger when a record gets created on the object and run the flow after the record is saved



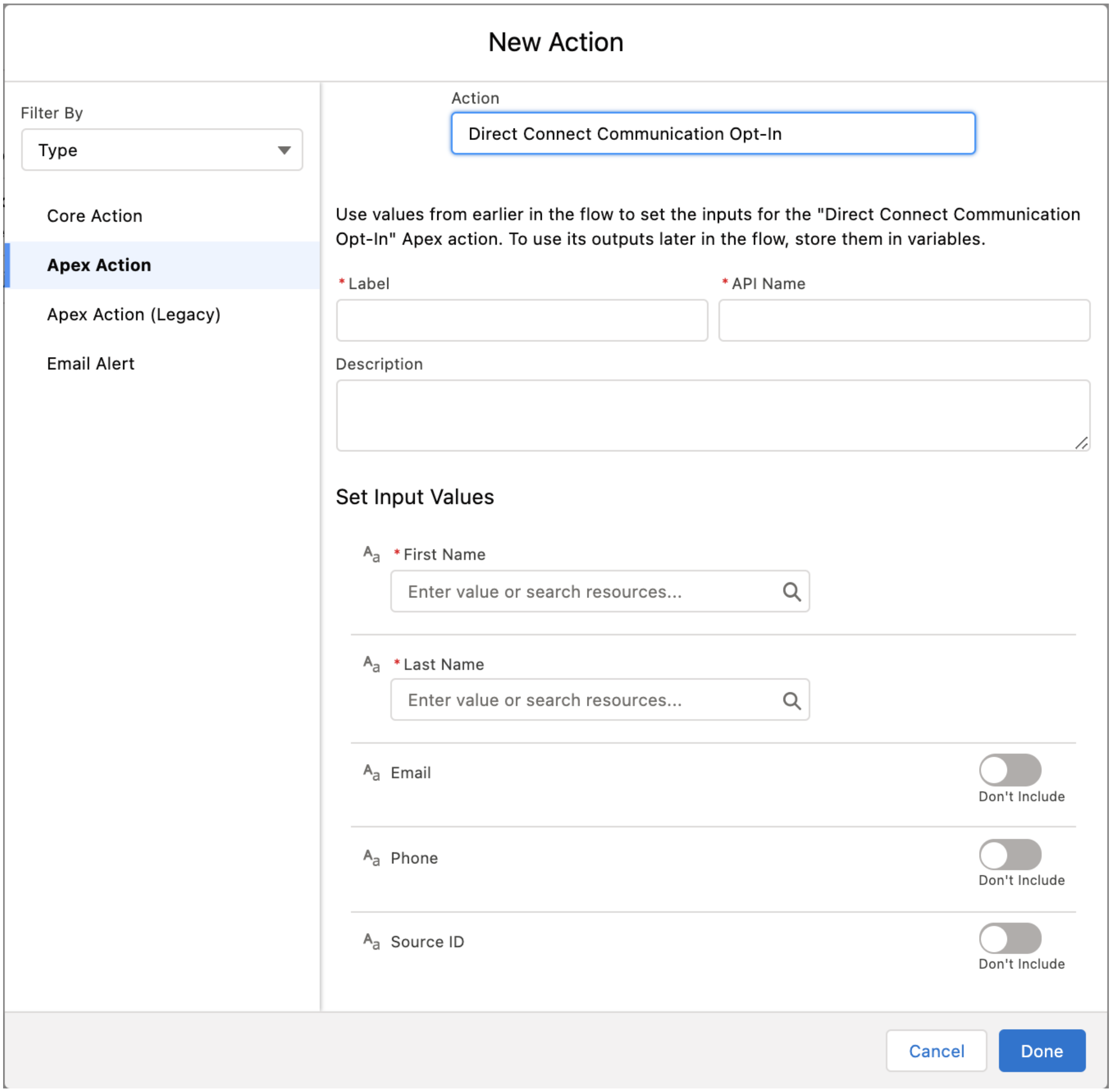
- Drag an action element onto the flow to add the invocable method



- Select Type in the Filter By field
- Select Apex Action from the menu bar
- Select Direct Connect Communication Opt-in as the action



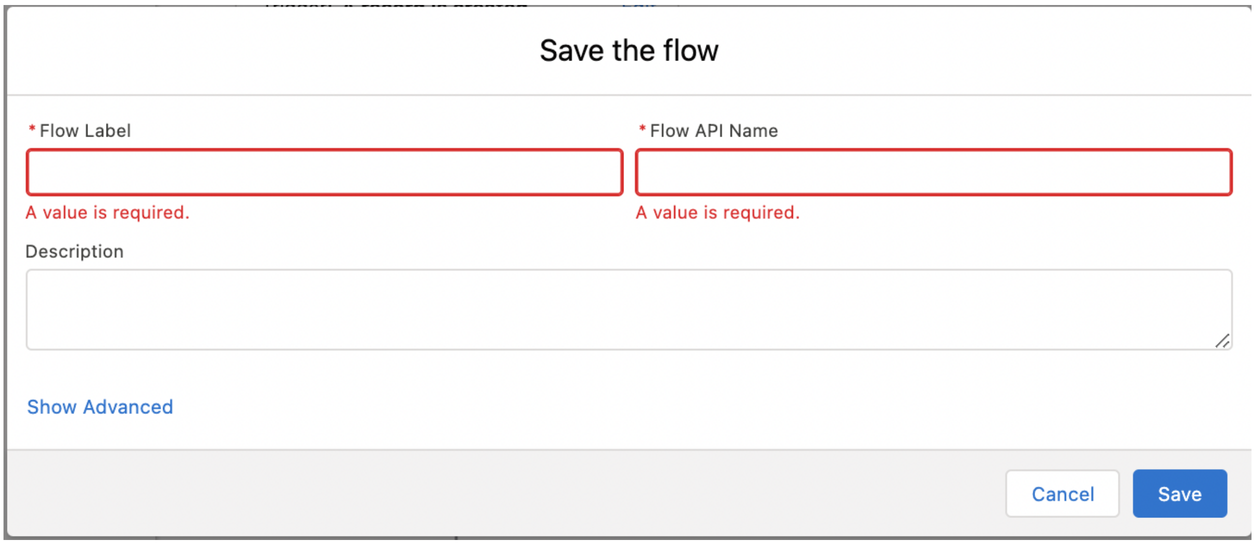
- Give the action a label, description, and set the input values
    - Note that the following fields are required
        - Label
        - API Name
        - First Name
        - Last Name
- Select **Done** button



- Connect the Start to the Action element
- Select the **Save** button in the top right hand corner to Save the flow
- Give the flow a name
    - Note the following fields are required:
        - Flow label

    - Flow API Name

- Select the **Save** button



- Once the flow is saved, select the **Activate** button in the top right hand corner to activate the flow
- The flow will now automatically run according to the conditions set

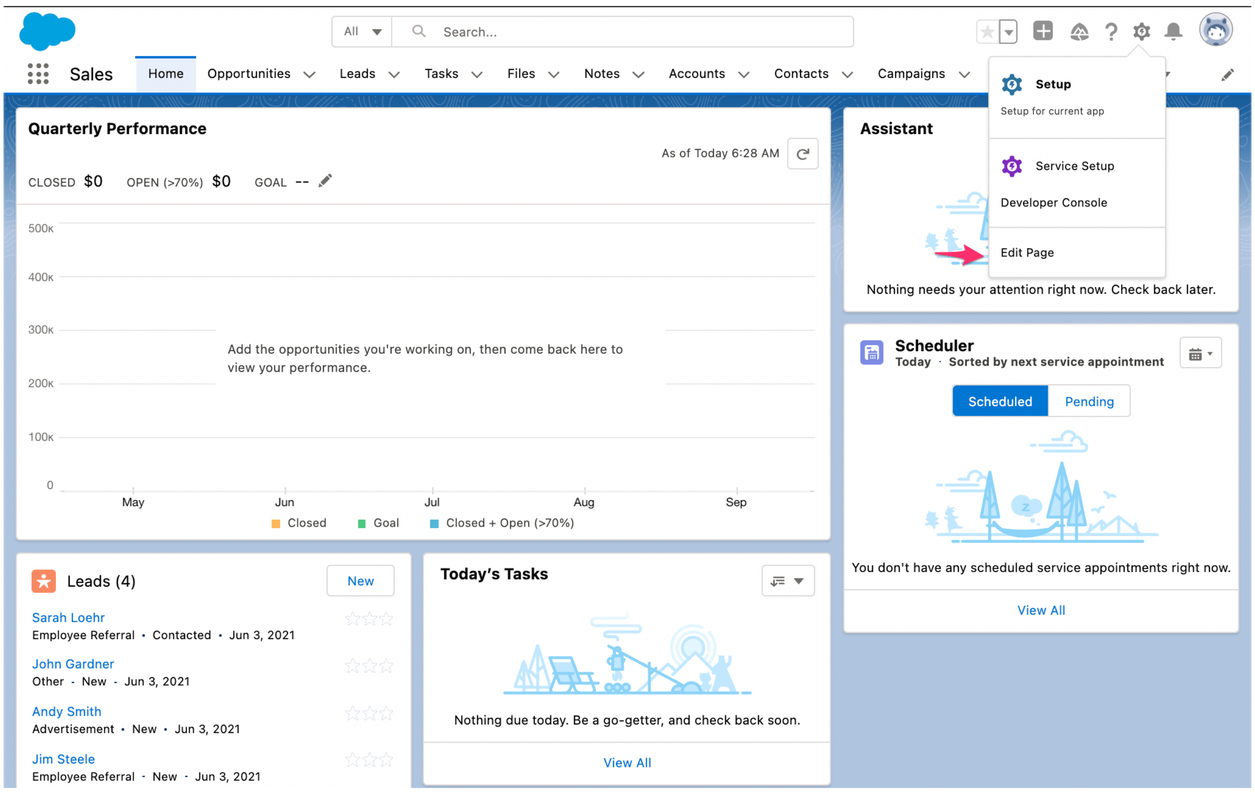
Adding iFrame Component to a Page

There is one iFrame component provided with the Direct Connect app. The Direct Connect Dashboard component will allow users to view SPLICE owned reports on all page types. While typically used on the home page, the iFrame component may also be added to any record page to visually show users data on the opt-in decisions tracked by SPLICE Software.

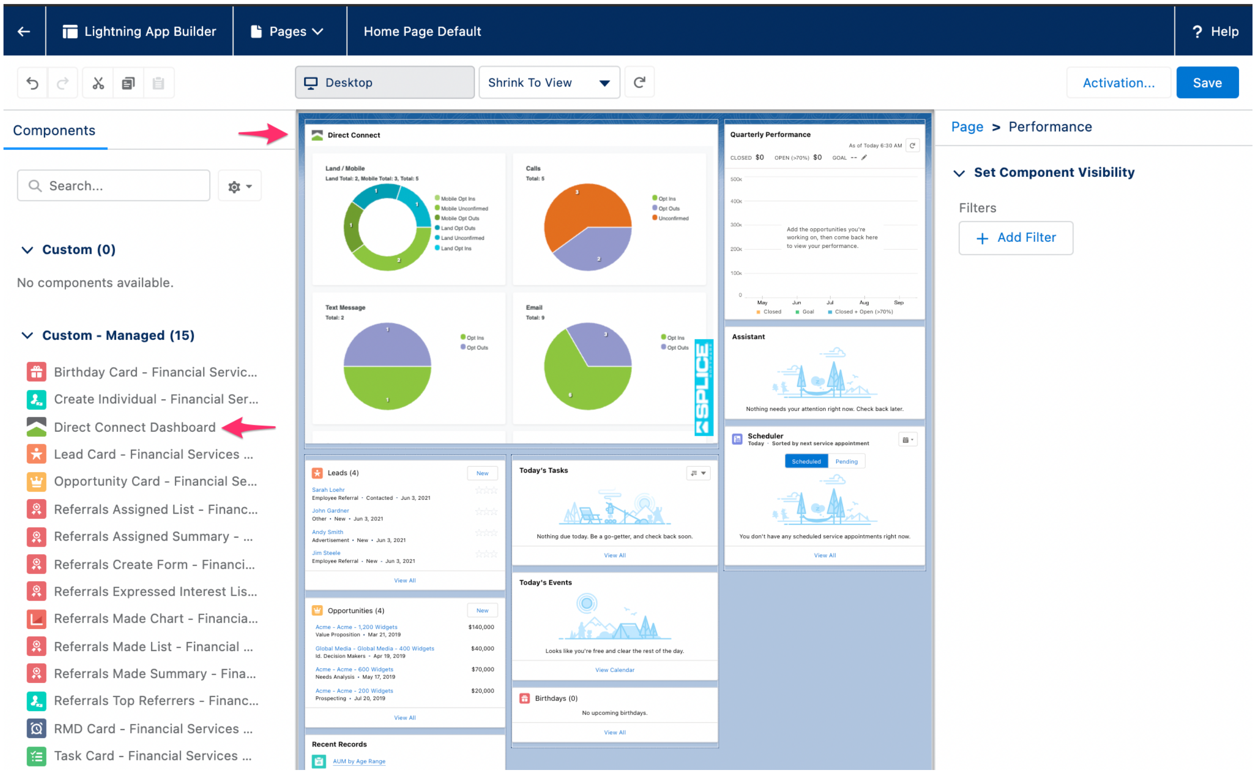
Home Page

To add the Direct Connect Dashboard component to a home page, navigate to the desired home page.

- On the selected home page, select the Setup gear from the top right hand corner
    - Select Edit Page



- Drag and drop Direct Connect Dashboard from the Custom - Managed section onto the main panel

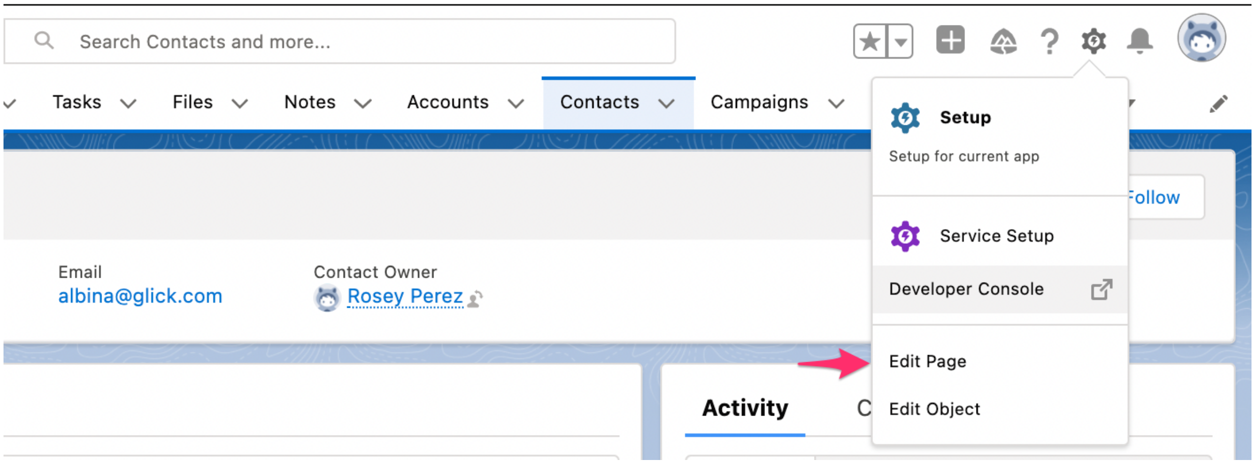


- Save the edited lightning page
  - If this is the first time the lightning page for that object has been edited, the edited page may need to be activated

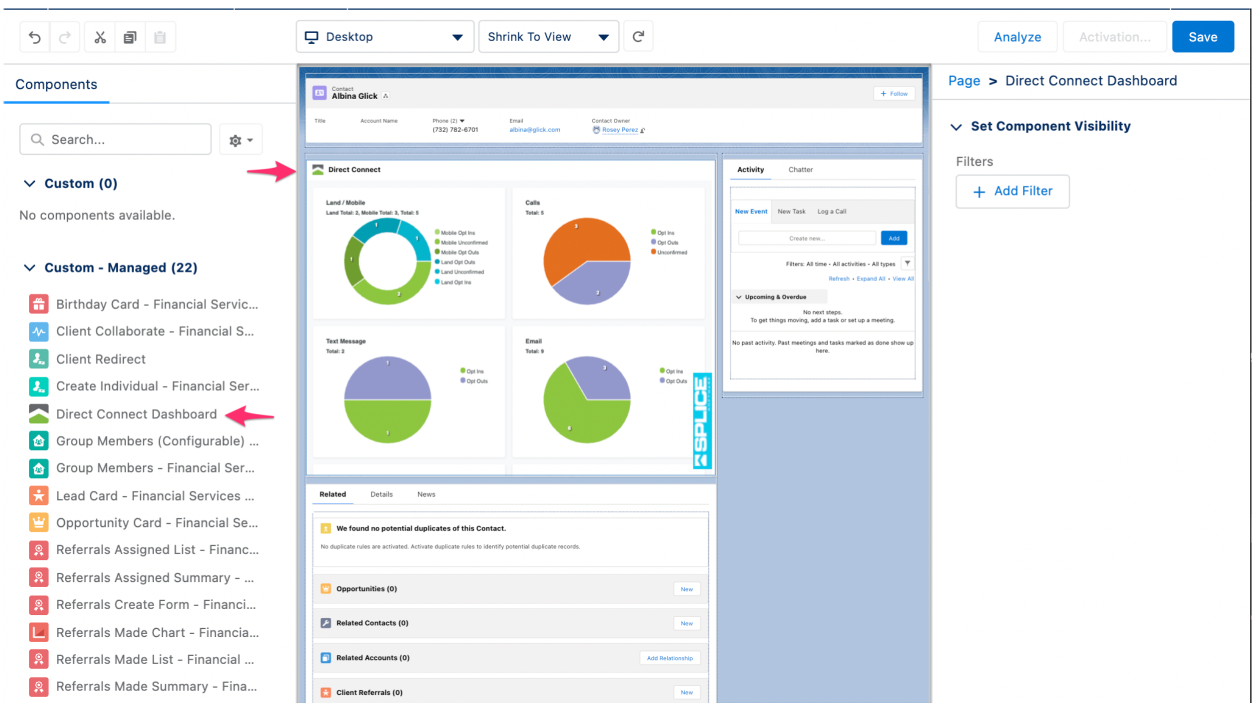
Record Page

To add the Direct Connect Dashboard component to a record page, navigate to the desired record page.

- On the selected record page, select the Setup gear from the top right hand corner
  - Select Edit Page



- Drag and drop Direct Connect Dashboard from the Custom - Managed section onto the main panel



- Save the edited lightning page

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