

Direct Connect

INSTALLATION & CONFIGURATION GUIDE



Table of Contents

[Introduction](#)

[Installation](#)

[Direct Connect Configuration](#)

[Configuring a Process with Invocable Method](#)

[Configuring a Flow with Invocable Method](#)

[Adding iFrame Component to a Page](#)

[Home Page](#)

[Record Page](#)

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.

**Install splice**
By SPLICE Managed


☒ **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

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.

Website	SSL Encrypted
api.splicetest.com	☒
files.splicetest.com	☒

☐ Yes, grant access to these third-party web sites

Continue **Cancel**

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

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 a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All ▼ [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label ↑	Description	License
☐ Clone	Relationship Manager Access		Salesforce
☐ Clone	SPLICE Opt-In User →		
☐ Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any en...	Cloud Integration User
☐ Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User

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

Permission Set
SPLICE Opt-In User

Find Settings... Clone **Manage Assignments** →

Permission Set Overview		API Name	SPLICE_Opt_In_User
Description		Namespace Prefix	spliceprod
License			

- Select **Add Assignments**

Assigned Users
SPLICE Opt-In User

[Back to: Permission Set](#)

Add Assignments Remove Assignments							
Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
No records to display.							
Add Assignments Remove Assignments							

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

Assign Users
All Users

View: All Users Edit Create New View

Assign Cancel

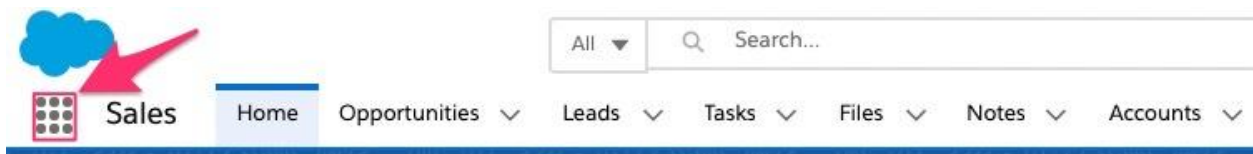
Action	Full Name	Alias	Username	Last Login	Role	Active	P
☐ <a>Edit	Chatter Expert	Chatter	chatty.00d5e00001cqnbea0.znqove5kr0hy@chatter.salesforce.com			✓	C
☐ <a>Edit	Perez, Rosey	RPere	rosey+spicefscqa@applophony.com	6/21/2021, 7:14 AM		✓	S
☐ <a>Edit	User, Standard	suser	rosey+standarduser@applophony.com	6/18/2021, 1:32 PM		✓	S

Assign Cancel

A B C D E F G H I J K L M N O P Q

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**



▼ All Apps

The screenshot shows the Salesforce App Launcher interface. At the top, there is a search bar with the placeholder text "Search apps or items..." and a button labeled "Visit AppExchange". Below the search bar, there is a section titled "▼ All Apps". A red arrow points to the "Direct Connect Setup" app, which is highlighted with a red box. The app card for "Direct Connect Setup" includes a green house icon, the title "Direct Connect Setup", and the description "Configure settings for Direct Connect in your Salesforce org.". Other visible app cards include "Wealth Management", "Retail Banking", "Sales", "Platform", "Salesforce CMS", "Bolt Solutions", "Insurance Agent Console", "Retail Banking Console", "Commercial Banking Con...", "Financial Services Cloud (...)", and "Insurance Console". Each app card also features a small icon and a three-dot menu icon.

- Select the **Get Started** button



Package Version: 1.6

Get Started

1

System Connections

Configure the connection between Salesforce and Direct Connect

2

Data Sync Configuration

Determine how data is synchronized between Direct Connect and Salesforce

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

Connect to Direct Connect

Provide your SPLICE API Key to connect your Salesforce org to Direct Connect.



Not Connected

SPLICE API Key

.....

Authorize



- 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



Package Version: 1.2



System Connections

Configure the connection between Salesforce and Direct Connect

Edit



Data Sync Configuration

Determine how data is synchronized between Direct Connect and Salesforce



Start

- 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

Batch Job Configuration

Specify how often you would like to sync data in Direct Connect with your Salesforce org. Batch jobs that are scheduled once daily must have a start time specified. Jobs running at intervals of less than 24 hours will first execute as soon as possible before re-running at the specified interval.

Job Frequency ⓘ

1 hour ▼

15 minutes

30 minutes

✓ 1 hour

2 hours

24 hours

Job Start Time

As Soon As Possible ▼

Activate

Finish ✓

ex jobs in your Salesforce org. Avoid scheduling your same time as the Apex jobs listed.

NEXT RUN TIME

No scheduled jobs

- 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

Batch Job Configuration

Specify how often you would like to sync data in Direct Connect with your Salesforce org. Batch jobs that are scheduled once daily must have a start time specified. Jobs running at intervals of less than 24 hours will first execute as soon as possible before re-running at the specified interval.

Job Frequency ⓘ

24 hours ▼

Job Start Time

12:00 am ▼

Activate

Below are all other scheduled Apex Batch Jobs at the s

eduling your

Other Scheduled Jobs

JOB NAME
No scheduled jobs

Finish ✓

- 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

Batch Job Configuration

Specify how often you would like to sync data in Direct Connect with your Salesforce org. Batch jobs that are scheduled once daily must have a start time specified. Jobs running at intervals of less than 24 hours will first execute as soon as possible before re-running at the specified interval.

Job Frequency ⓘ

24 hours ▼

Job Start Time

4:00 am ▼

Activate

Finish ✓

Below are all other scheduled Apex jobs in your Salesforce org. Avoid scheduling your Batch Job at the same time as the Apex jobs listed.

Other Scheduled Jobs

JOB NAME	NEXT RUN TIME
No scheduled jobs	

Activate Job

Are you sure you want to activate this job?

Cancel

Activate

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

Batch Job Configuration

Specify how often you would like to sync data in Direct Connect with your Salesforce org. Batch jobs that are scheduled once daily must have a start time specified. Jobs running at intervals of less than 24 hours will first execute as soon as possible before re-running at the specified interval.

Job Frequency ⓘ

24 hours ▼

Job Start Time

4:00 am ▼

Deactivate

Finish ✓

Below are all other scheduled Apex jobs in your Salesforce org. Avoid scheduling your Batch Job at the same time as the Apex jobs listed.

Other Scheduled Jobs

JOB NAME	NEXT RUN TIME
No scheduled jobs	

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

New Process

Process Name * API Name * ⓘ

Description

The process starts when *

- ✓ Select One
- A record changes
- A platform event message is received
- It's invoked by another process

Cancel Save

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

Choose Object and Specify When to Start the Process

Object * ⓘ

Find an object...

▼

Start the process * 

☒ only when a record is created

☐ when a record is created or edited

> Advanced



Save

Cancel

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

Define Criteria for this Action Group?

Criteria Name * i

Criteria for Executing Actions *

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *
1	Find a field... Q	Equals ▼	String ▼	
+ Add Row				

Conditions *

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

Save

Cancel

- 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

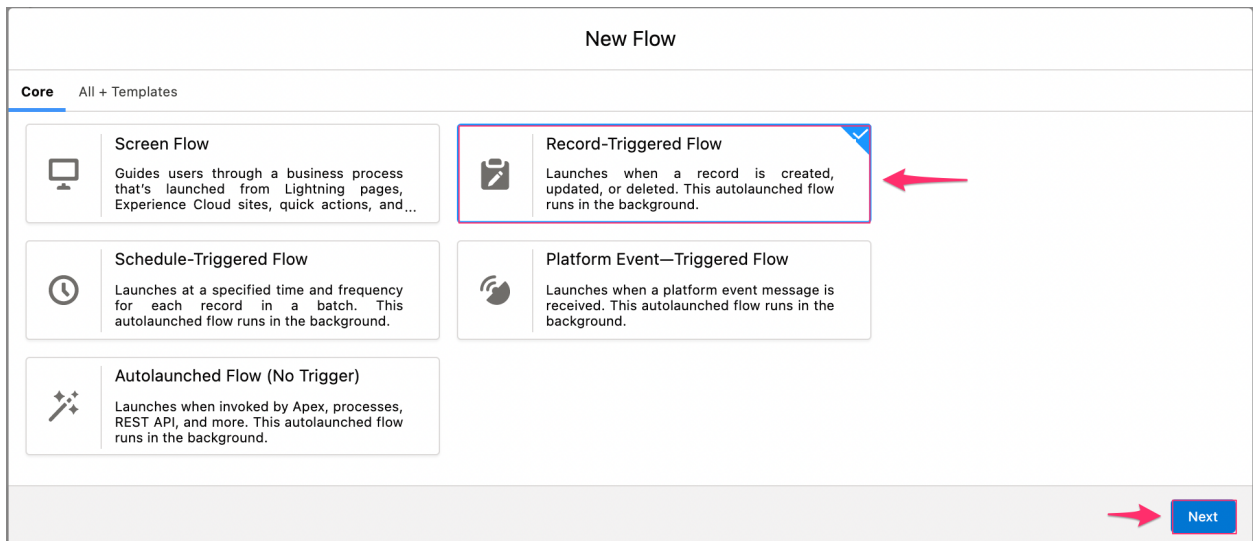
- In the top right hand corner, select the **Save** button
- Once the process is saved, select the **Activate** button to activate the process
- The process will now run automatically according to the conditions set

Configuring a Flow with Invocable Method

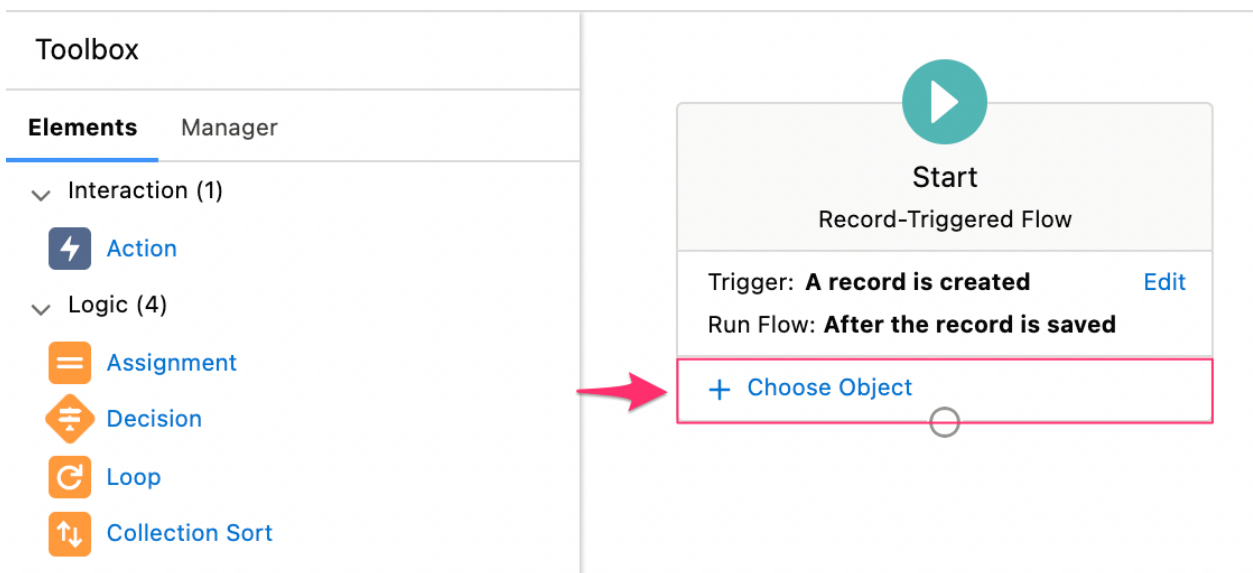
In order for Direct Connect to properly keep track of opt-in decisions for each contact, the setup assistant allows you to also build a flow using an invocable method. The invocable method may be used with any object. Once the process is triggered, the invocable method accepts an email, phone number 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

Toolbox

Elements

Manager

Interaction (1)

⚡

Action

Logic (4)

≡

Assignment

⬮

Decision

↻

Loop

↕

Collection Sort

Data (4)

+

Create Records

✎

Update Records

🔍

Get Records

🗑

Delete Records

▶

Start

Record-Triggered Flow

Trigger: **A record is created**

Edit

Run Flow: **After the record is saved**

+ Choose Object

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

New Action

Filter By

Type ▼

Core Action

Apex Action

Apex Action (Legacy)

Email Alert

Action

Direct Connect Communication Opt-In
apex-spliceprod__spliceInvocable



Lights, camera, action!

Select an Apex action to configure.

Cancel

Done

- 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

New Action

Filter By

Type ▼

Core Action

Apex Action

Apex Action (Legacy)

Email Alert

Action
 Direct Connect Communication Opt-In

Use values from earlier in the flow to set the inputs for the "Direct Connect Communication Opt-In" Apex action. To use its outputs later in the flow, store them in variables.

* Label

* API Name

Description

Set Input Values

A_a * First Name

Enter value or search resources...

Q

A_a * Last Name

Enter value or search resources...

Q

A_a Email

Don't Include

A_a Phone

Don't Include

A_a Source ID

Don't Include

Cancel

Done

- 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

Save the flow

* Flow Label

A value is required.

* Flow API Name

A value is required.

Description

Show Advanced

Cancel

Save

- 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.

DIRECT CONNECT
Powered by **SPLICE**

salesforce

25

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

The screenshot shows the Salesforce Direct Connect Dashboard interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a secondary navigation bar with tabs for Sales, Home (selected), Opportunities, Leads, Tasks, Files, Notes, Accounts, Contacts, and Campaigns. The main content area is divided into several sections:

- Quarterly Performance:** A large section with a line chart showing performance from May to September. It includes metrics for Closed (\$0), Open (>70%) (\$0), and a Goal. A message prompts the user to add opportunities.
- Leads (4):** A list of leads with details like name, type, and date. Leads listed are Sarah Loehr, John Gardner, Andy Smith, and Jim Steele.
- Today's Tasks:** A section with a task icon and a message: "Nothing due today. Be a go-getter, and check back soon." with a "View All" link.
- Assistant:** A section with a message: "Nothing needs your attention right now. Check back later."
- Scheduler:** A section showing "Today" sorted by next service appointment, with buttons for "Scheduled" and "Pending". A message states: "You don't have any scheduled service appointments right now." with a "View All" link.

A "Setup" menu is open in the top right corner, showing options: Setup for current app, Service Setup, Developer Console, and Edit Page (highlighted with a red arrow).

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

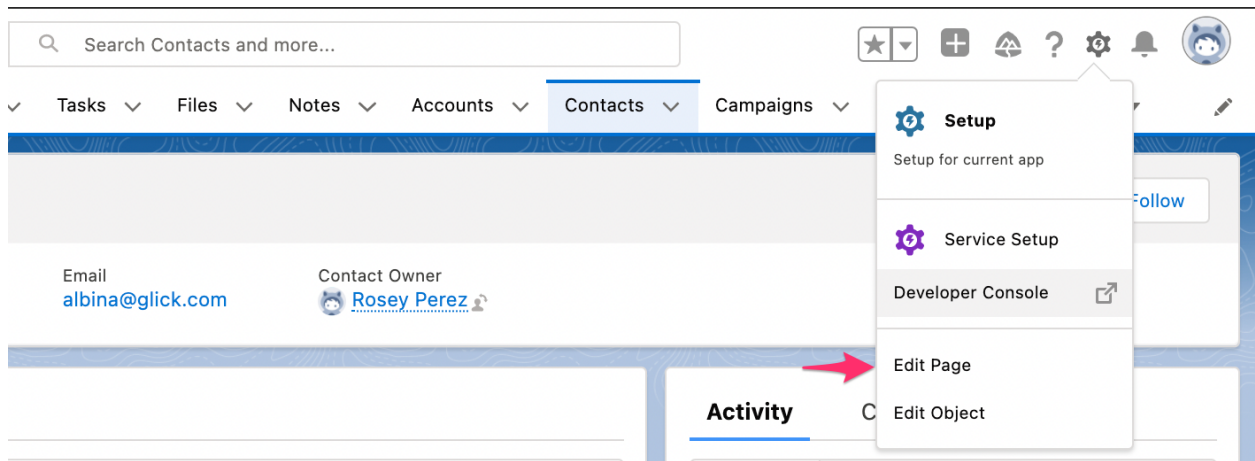
The screenshot displays the Lightning App Builder interface. At the top, there's a navigation bar with 'Lightning App Builder', 'Pages', and 'Home Page Default'. Below this is a toolbar with icons for undo, redo, delete, and a 'Desktop' view selector. The left sidebar shows a 'Components' panel with a search bar and a list of components. The 'Custom - Managed (15)' section is expanded, and 'Direct Connect Dashboard' is highlighted with a red arrow. The main preview area shows the 'Direct Connect' dashboard, which includes a 'Land / Mobile' donut chart, a 'Calls' donut chart, a 'Text Message' donut chart, an 'Email' donut chart, a 'Leads (4)' list, 'Today's Tasks', 'Today's Events', 'Opportunities (4)' list, 'Recent Records', 'Quarterly Performance' bar chart, 'Assistant' chatbot, and 'Scheduler' section. The right sidebar shows the 'Page > Performance' section with 'Set Component Visibility' and 'Filters' options.

- 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

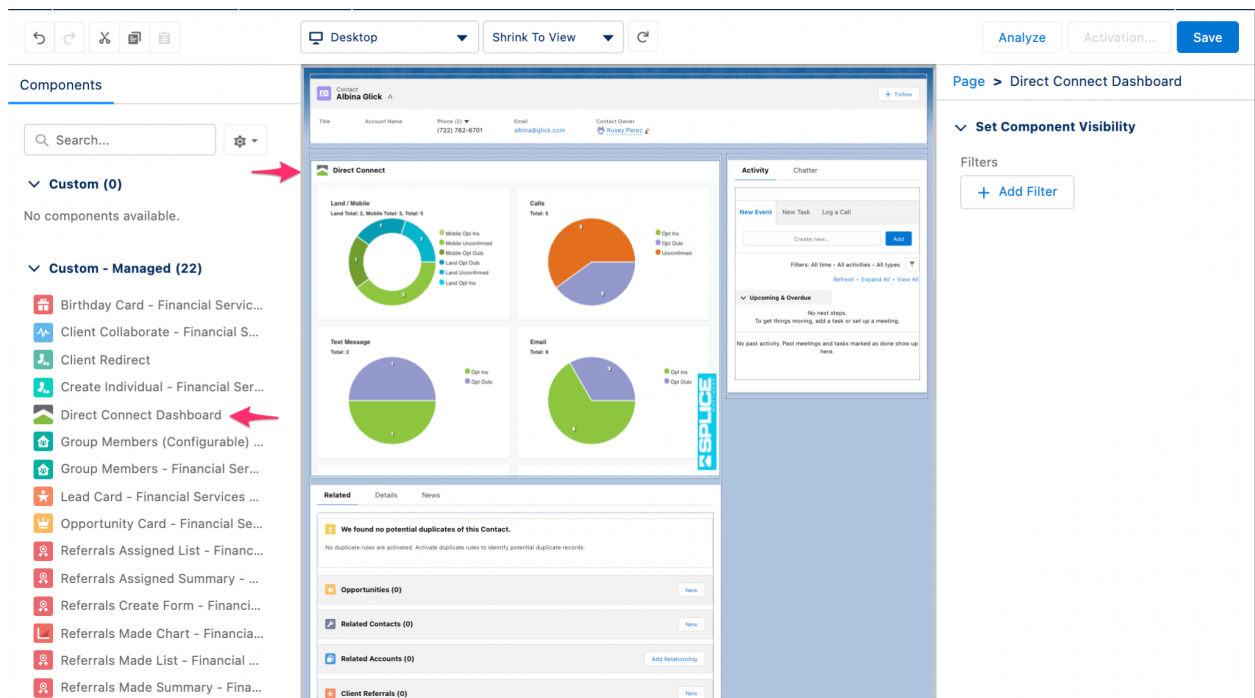
Record Page

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

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