Record-to-Web (RtW)

Salesforce Connector to Website

RECORD-TO-WEB

UNLEASH YOUR SALESFORCE DATA!

SmartStart Guide for Admins

Get up and Running with RtW

Version: 1

Published: October 2021

Created by

PURSUITPOWER

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Introduction to RtW (Record-to-Web)

Many companies struggle with accurately showing data on their website that are kept and maintained in Salesforce. Ideally, certain named users should be able from within Salesforce to select, on the spot, which data should be shown. Use cases are job postings, customer quotes, customer references, product information, newsfeeds, ...

Record-to-Web is an Integration App in the ‘IT & Administration’ category of the AppExchange that enables users to easily publish data directly from salesforce on to their company website. In other words, a Salesforce connector for Websites.

There are different types of users that will come in contact with RtW:

- The RtW users are authorized to publish Salesforce data with a click
- The Admin will make use of the RtW set-up tabs (RtW Data Manager and RtW Publisher) to enable and customize RtW for your Salesforce Org.
- For completeness, in the RtW set-up, next to Salesforce users, the webmaster (a non-salesforce user) will also be involved to insert the RtW code on the company website.

A Salesforce admin can enable RtW in their org in a few simple steps:

1. **Install RtW from Appexchange** - The admin can check out the app from the appexchange.
2. **Perform Admin Prep Work** - Via set-up, the admin does some prep work such as creating a ‘Publish to RtW’ checkbox for each object where RtW will be used for as well as a Salesforce site specifically for RtW
3. **Select the RtW Object and Fields** - In the RtW Data Manager, the admin pre-selects which fields from which object and in what order these fields could be shown on the website in the event that a user selects a record from the selected object for publishing.
4. **Drag & drop the RtW Preview Component and select some records** - In the App Builder (or Community Builder), the admin drags and drops the RtW Preview component to the page layout of the chosen object. It contains an RtW preview and an RtW checkbox. Now you can already select records for RtW.
5. **Test API** - making use of the Pursuitpower testsite, the Admin can easily test that the required data is flowing through
6. **Customize your web look & feel -** in the RtW Publisher, the admin chooses the customization options.
7. **Generate & Integrate RtW Webcode** - At completion of the customisation settings, the required webcode is generated with one click. The Admin can provide a copy of that code to the company webmaster for pasting onto the company website back-end.
8. **Authorize RtW users** - Users, authorized by the admin through profile or permission set, can now check the RtW checkbox on the record page of their choice. When

checked, the information of that particular record is showing in their preview and will instantly be published on the company website.

Each of the steps are further clarified hereafter.

Enabling RtW in your Org

Install RtW from Appexchange

Just follow the instructions of the AppExchange. You know the drill!

Once RtW is installed in your Org, you are ready for the next steps.

Perform Admin Prep Work

In order for the RtW further setup to go smoothly, there are a few things you as admin should do first. This will ease the entire set-up process. All are pretty standard actions, but for your convenience, they are described here as well:

Create RtW checkbox

For using RtW, you will need an adequate controlling field. This is a checkbox that the user will use to activate/deactivate the chosen record for RtW publishing. You might already have a checkbox on your chosen object and in principle you could use that one for RtW as well. However, we strongly recommend to set up a specific RtW checkbox for each object you want to use for RtW. It will greatly ease the permissions settings later on when you are determining the authorized users for RtW.

If your chosen object has not yet an adequate controlling field, you, as admin, should first add an additional checkbox on the selected object. This is done in the normal way via set up.

- Click the Set up icon and the click set-up again to arrive on the Setup screen
- In the Setup screen, select the ‘Object Manager’ tab
- In the left hand side column, click the object for which you want to create the checkbox. The Object screen is now shown.
- In the left hand side column, click Fields and Relationships. Choose New to create a new field.
- Select checkbox as Data type and click Next
- Type a Field label. Basically, you can choose any name you want here, but we suggest that you give it a comprehensive name like ‘Published via RtW’ or ‘Selected for RtW’. This will be a lot clearer for the users.
- Choose Unchecked as default value
- The field name is populated automatically
- Complete Description and Help text to your liking and click next
    - Description: Controlling field for RtW

    - Help text: Checking this checkbox will make the data in the RtW preview publicly available
- Keep standard settings for Field level security and click next. Later we will use permission sets to allow access to the right user
- Uncheck the Add Field checkbox. Now all Page Lay-outs are unchecked and click Save.

Your checkbox has now been created. It will not show yet on any page layout. Later in the process we will refer to this checkbox to make it the controlling field for RtW and move it to the page lay-out as part of the RtW component.

Create Permission set to activate RtW authorized users

As you know by now, RtW enables users to easily publish data directly from salesforce into their company website. Not every user in your organisation might be allowed to determine whether certain information can be published. Therefore your organisation can choose to enable one or more users to make use of RtW.

You can authorize RtW users by creating a specific permission set for each chosen object for RtW and then, later in the process when RtW is fully set up, allocate that to the selected user(s). To create the Permission set:

- Go to Set up, Quick Find and type Permission Sets.
- Click New
- Label: <Object> RtW permission
- Description: permission set to use RtW on <Object>
- License: keep on default ‘None’
- Click Save

Now you have the permission set that can be used at the very end to authorize the RtW users.

Create Salesforce Site URL for RtW

You might already have some sites in use in your Org. We do however strongly recommend to set-up a separate site for RtW. This will be efficient for the permissions and control on the public data that will be shared via RtW.

To set up the site URL, go to Salesforce Setup on the Home tab, Type ‘Sites’ in Quick Find and click ‘Sites’ .

Note: In order to create a ‘site’, you first need a domain. If you already have a domain, you will immediately be routed to the sites setup page. If you need a domain, you need to pick a name, and click the ‘check availability’ button. If successful, check the ‘read and accepted’ checkbox. Then click ‘Register My Salesforce Site Domain’ and click ‘OK’ when asked when you’re sure.

If you have a domain, go to the Sites Setup page, click ‘New’ to create a new Site for RtW.

In the Site Edit screen, most fields can stay as auto populated. Only add/review the following information:

- Site Label: Here you specify the name of the site. As we are creating a site for RtW, ideally you name it ‘Record-to-Web’ or something similar
- Site Name: when a site label is filled, Site Name is filled automatically.
- Default web address: Here you can specify the web address. As we are creating a site for RtW, ideally you name it ‘rtw’
- Active Site Home page: choose ‘UnderConstruction’
- Clickjack Protection Level: Keep the default option ‘Allow framing by any page (No protection). Important: the reason for deviating from the Recommended option is because this option will allow the customisation options which are chosen later in the RtW Publisher, to take effect.
- All other fields can stay as filled in by default
- Click Save
- Click Activate
- Click ‘Public Access Settings’ and then click ‘Apex Class Access’. Click Edit. In the drop down, select the ‘r2w.RestData’ Apex class and click the arrow to add it to the enabled Apex Classes list. Then click ‘Save’.
    - **Note**: In this list, there is also a ‘r2w.TestRestData’. Do not select this Apex class.
- Click the arrow next to Apex Class Access and then select ‘Visualforce Page Access’.
- Click ‘Edit’. In the drop down, select the ‘r2w.Iframe’ Visualforce page and click the arrow to add it to the enabled Visualforce Pages list. Then click ‘Save’.

Your Site URL for RtW has now been created. Later in the process we will refer to this Salesforce Site URL. So best you take a copy of the site link by clicking ‘Sites’ in the Setup menu, right-click the site url and choose ‘ Copy link address’.

Note: Salesforce has a license policy for the number of sites in your org; Dev org have a site license per default. An error message could occur if you have used up all your sites.

Add your company website to the CORS Allowed Origins List

CORS stands for Cross-Origin Resource sharing. It allows code (such as Javascript) running in a Web browser to communicate with Salesforce. With RtW, as you know, we’re making that connection between your website and salesforce org. The steps are easy:

- Go to Salesforce Setup and on the Home tab, Type ‘CORS’ in Quick Find and click ‘CORS’.
- Click ‘New’
- Type your company URL in ‘Origin URL Pattern’ (format: https://www.mycompany.com)
- Click Save

Note: in the Allowed Origins list, you will also find our Pursuitpower URL. This was added so the API Test later can work.

Now your company website has been added to the CORS Allowed Origins List and the RtW checkbox and Site URL are created, we are ready for the next step.

Choose your Object and Fields in the RtW Data Manager

The first part of determining the RtW settings happens in the RtW Data Manager. Here, the admin chooses which fields from which object and in what order these fields could be shown on the website in the event that a user selects a record from the selected object for publishing. The following steps are made:

Log into RtW

Click the App Launcher icon (top left corner next to Setup), click 'view all' and then select the RtW app in your app overview, by default you arrive on the RtW Data Manager tab.

Choose and Enable Object

On the left sidebar, you will see the list of All Objects that are part of your Org, both standard objects and custom objects. These are pulled in at the moment you arrive on the page. On top, you have a quick find area to quickly find the object that you want to use for RtW.

You select an object on the left side of the screen by clicking its name. Then click the 'Enabled' checkbox to confirm the chosen object. A checkbox will appear next to the enabled object Now you are ready to pre-select the fields as a next step.

Pre-select fields on Object

When you have selected an object, automatically, all fields and the type are listed. So now it's time to pre-select the fields you want to use for RtW. Each field has a deactivated 'Enable' button next to the field.

On the chosen object, you can scroll and pre-select the fields you want to include in your RtW publication through clicking the enable button next to the field. Now, you have determined which fields can show up in your RtW for this object. The actual order of fields will be determined later in the RtW Publisher tab.

Note: Be careful with the fields you pre-select here! All of the fields chosen will be part of the API communication (even when you decide not to pick up the field later in the process). So, for security reasons, only pre-select the fields that hold data that are being considered as public data..

Note 2: If you want to combine information from different objects in one RtW, as sys admin you could also set up a custom object that already brings together the information. RtW can then be set up for that specific custom object.

Choose the controlling field on Object

Once you have selected the object and fields, it is important to set the controlling field. This is a checkbox field on the selected object that will determine whether or not the record is chosen for RtW publication (which you created as part of the Admin prep work). When clicking the arrows next to the 'Choose one' message, by default, all existing checkboxes on the chosen object are shown and the RtW checkbox you've created earlier can be chosen.

Save the Object settings

You've picked and enabled the object, chose the fields and determined the controlling field. As a last step click the Save button.

You're done in the RtW Data Manager. Now, you're ready to add the RtW component to your object, select some records to test, test your API and then navigate to the other tab 'RtW Publisher'.

Drag & Drop the RtW component on the Page Layout...and select some records

Okay, now we've taken care of the RtW Data Manager settings, now we need to ensure that RtW is accessible from your chosen object, so a user will be able to activate a record for RtW. In order to do that:

- Go to the chosen object in your Salesforce Cloud and pull up any object record
- Then click the Setup button and choose 'Edit Page'. This brings you directly to the correct page in the Lightning App Builder.
- From the left Components pane, go to 'Custom - Managed' components and drag and drop the Record-to-Web Preview on the page on the spot where you want it. Typically, on top just below the header is a good spot.
- Click Save and move out the Lightning App Builder (Activate, Assign as org default, Desktop, Next, Close and Save and click the arrow in the right corner to move out to the Lightning App Builder).

Hold on! You're not done here, please now select a few records (eg 4 to 7) for RtW in your object via your component checkbox. You will not only see how the component populates with your record's data. The records will give meaningful results in the RtW preview pane when you are customizing your set up later on.

Test Your RtW API Preview with the RtW Testsite

Since you now have selected your object and fields and you have selected some records via the RtW component, you are all set to perform a quick API test.

An API test can be done by navigating to our own Pursuitpower site at https://www.pursuitpower.com/record-to-web-preview/.

It's simple. Enter your site URL (which was created in the Admin prep work and used during the RtW customization) and the object API name. Then click the Preview button. If all looks good, you know the API is working and the data will come through. Now you're ready to further configure and customize RtW by e.g. determining the order of the fields and the look and feel.

Note: The API name is often the same as the object name, but not always. So for the API test, it is important to use the correct API name. If you are in doubt, On the RtW Datamanager tab, also the API name of your selected object is specifically mentioned.

Customize the look & feel in the RtW Publisher tab

Now it's time to move to the RtW Publisher tab. For ease of use, you can find detailed instructions on the right side of the screen on what steps to take. You should take the following steps:

- **Publisher** holds per default the value 'Iframe'.
- **Salesforce Site URL**: Insert the link of the Salesforce site URL for RtW that was created in the Admin Prep Work.
- **Enable HTTPS (recommended)**: If your company website url start with https (most websites these days will), then keep this checkbox checked. If your company website url starts with http, then you need to uncheck this checkbox.
- **Object**: select the object that you will prepare for RtW. Values that are shown here are all objects that you have preselected earlier (enable and save) in RtW Data Manager.
- **Select Fields**: Per default, all fields that were pre-selected in the RtW Data Manager for this Object are shown in the 'Selected' box.
    - The up/down buttons can be used to rank your selected fields. If needed, you can deselect a field here.
    - Clicking the arrow that points left will move the field from selected to available.
- **Title field**: This field allows you to choose one of the available fields as a title. Per default, the value 'none' is selected. This means the object name is taken as title. With the drop-down list, you can select any of the earlier selected fields to be the title. When chosen, the value of the field will be taken as the title.

  Note: If you select a field for title, the same field will still be in your selected field list. You can remove your field there in order to avoid having the filed twice on your card(as title and as filed))

In the customization section, there are the following options:

- **Background**: Here you can choose between Transparent or Color
    - Default value is 'Transparent' as this will typically best fit with most websites

    - Checking the ‘Color’ checkbox will show you the color panel. Click the arrow next to the color to arrive at the color panel. You can either click a color in the top color box or you can fill the Hex color code. Once you have selected the color, click done to return to the customizations.
- **Card Background**: Here you can choose between White (default), and again, Transparent or Color.
- **Title Style**: Determines the color of the title. Here you can choose between Transparent or Color (any of the color palette).
- **Label Style**: Determines the color of the label (= the field name) . Here you can choose between Transparent or Color (any of the color palette).
- **Value Style**:Determines the color of the value (= content in the field) . Here you can choose between Transparent or Color (any of the color palette).
- **Heigh**t: Automatic is the default value, but by selecting custom (in pixels), you can determine the height yourself.
- **Alignment**: Grow is the default value, but by making use of the arrows you can change to
    - Centered
    - Evenly Spaced out
    - Spread edge to edge
- **Wrap content**: Default is wrapped, but you can choose to unwrap

Note: if you want to RtW for different objects, first finalize the process for one object before setting up RtW for the next.

Check Preview and Pick-up Webcode

While customizing you can check out the live preview showing how the Iframe will look on your website. It adapts automatically as you make changes.

Once you are satisfied with the result, you can pick up the Webcode. Just click the copy icon at the right side of the webcode and you can paste it in a document or mail to handover to your webmaster for inclusion in the company website

Note: please make sure you already have selected one or more records for RtW to ensure that the preview is showing information.

Test RtW on your company website

Once the webmaster has included the code in your website, you can test again by selecting and deselecting some records using the RtW checkbox. Once you verify that this also works perfectly, you are ready to authorize the RtW users.

Authorize the RtW users

RtW enables users to easily publish data directly from salesforce into their company website. Not every user in your organisation might be allowed to determine whether certain information can be published. Therefore your organisation can choose to enable one or more users to make use of RtW. We can authorize RtW users by creating a specific permission set for each chosen object for RtW and then allocate that to the selected user(s).

- Go to Set up, Quick Find and type Permission Sets.
- Click New
- Label: <Object> RtW permission
- Description: permission set to use RtW on <Object>
- License: keep on default ‘None’
- Click Save
-
- Click Object Settings, choose your object
- Click Edit
- Click Read Access and Edit access for the RtW checkbox and click Save

Next to this also extra permissions are needed for the preview component. Specifically:

- Apex class access: r2w.PreviewLightningController
- Object: Published Sets. On this object admin should enable
- - View All
- - Read on all fields

Then

- Click ‘Manage Assignments’ and then ‘Add Assignments’
- Select users, click Assign, then click Done

Note: We assume that the authorized user already has all other object permissions. If not, then of course, additional object permissions should be allocated.

Alright!! You’re done!

If something is still unclear, do not hesitate to contact us via our listing on the Appexchange.

If everything is clear and you are satisfied with the result, please consider giving us a 5-star rating via the comments on the AppExchange!