Getting started with Intelliwell Informant
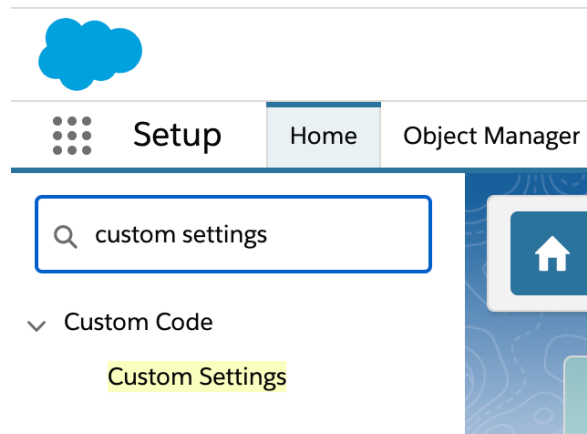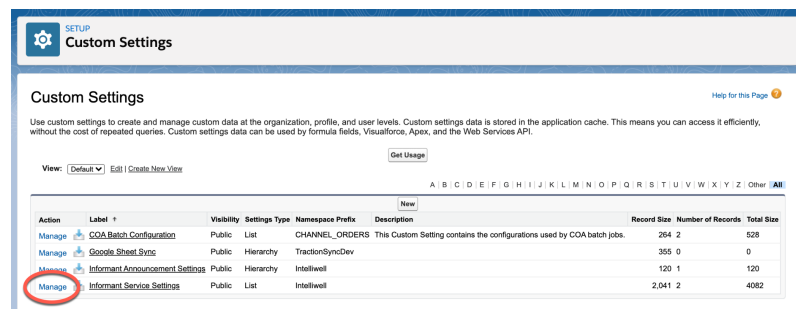
Create Custom Setting for Informant

Setup > Custom Settings

A new Custom Settings file named "Default" needs to be created.
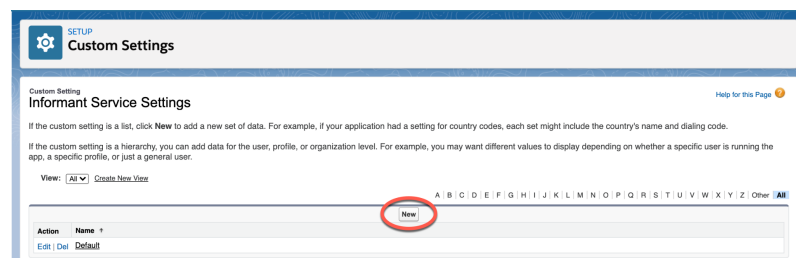
Search "Custom Settings"
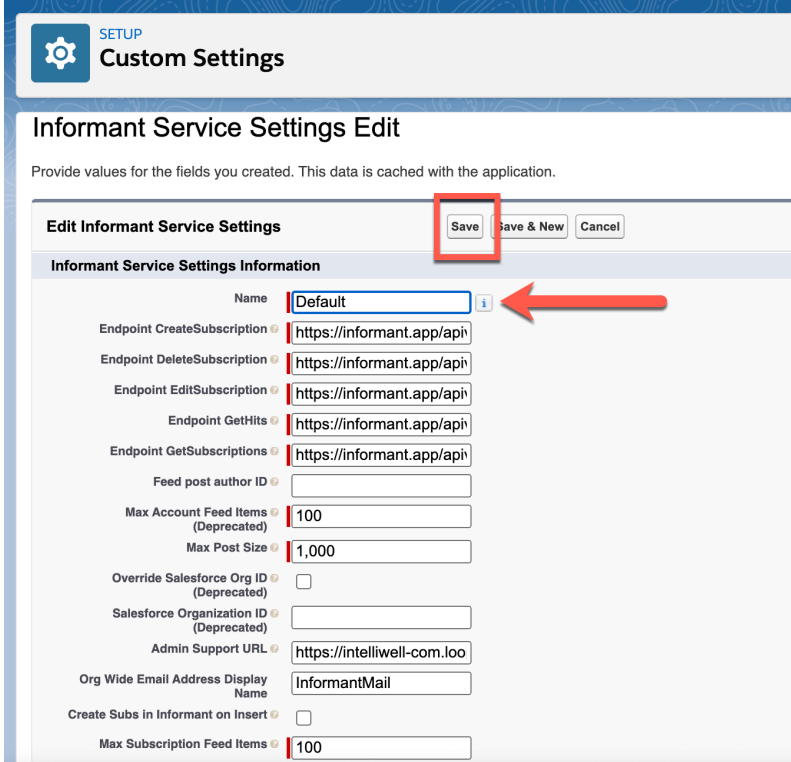

Click "Manage" at "Informant Service Settings"

Click "New"

Name it "Default"

NOTE: Exact spelling with
a capital "D" and
lower case "efault"

Save

SETUP
Custom Settings

Informant Service Settings Edit

Provide values for the fields you created. This data is cached with the application.

**Edit Informant Service Settings**   [Save] [Save & New] [Cancel]

Informant Service Settings Information

Name	Default
Endpoint CreateSubscription	https://informant.app/api
Endpoint DeleteSubscription	https://informant.app/api
Endpoint EditSubscription	https://informant.app/api
Endpoint GetHits	https://informant.app/api
Endpoint GetSubscriptions	https://informant.app/api
Feed post author ID	
Max Account Feed Items (Deprecated)	100
Max Post Size	1,000
Override Salesforce Org ID (Deprecated)	☐
Salesforce Organization ID (Deprecated)	
Admin Support URL	https://intelliwell-com.loo
Org Wide Email Address Display Name	InformantMail
Create Subs in Informant on Insert	☐
Max Subscription Feed Items	100

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www.intelliwell.com   +46-8-21 03 03   VAT: SE556708682101   BIC: DABASESX
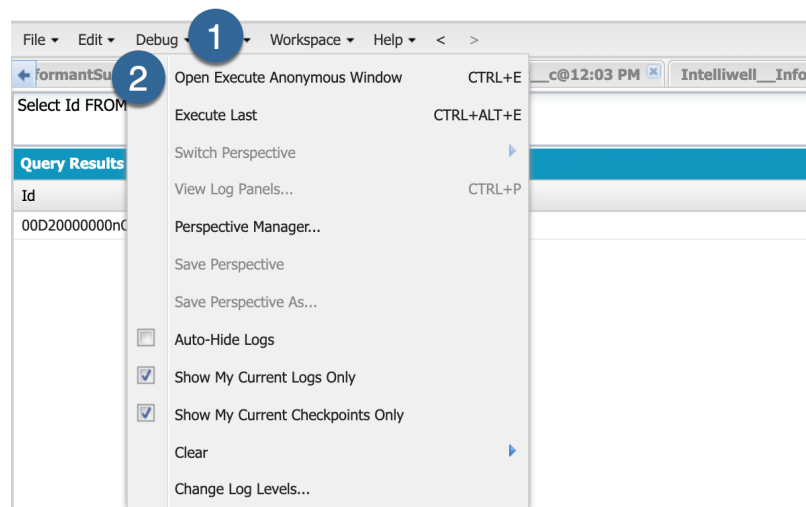
Start Scheduled Jobs

The new Scheduled Jobs is necessary and will collect new posts automatically.

Setup > *Developer Console*
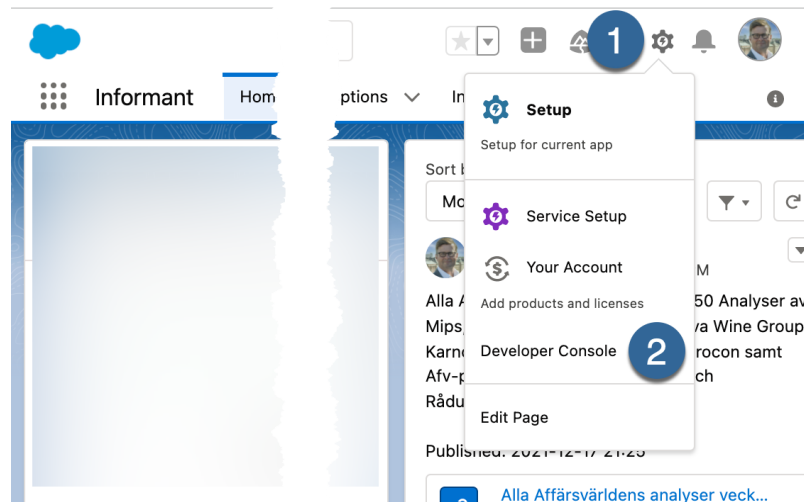
1. Select "Debug" from the menu

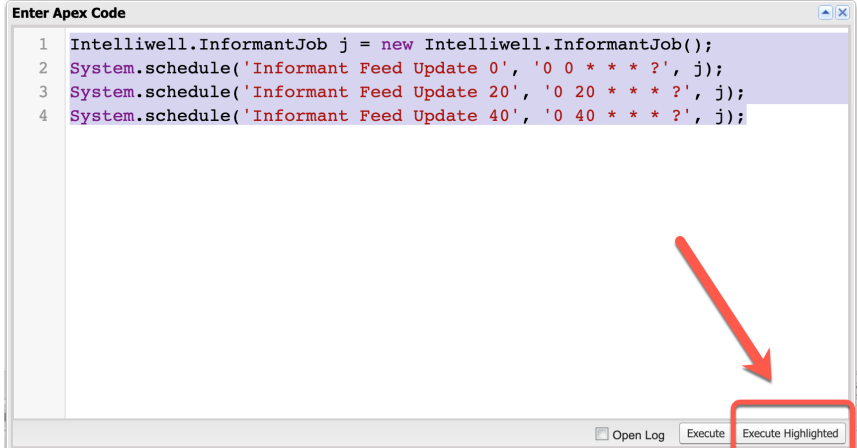2. Select "Open Execute Anonymous Window

Enter this code exactly

```
Intelliwell.InformantJob j = new Intelliwell.InformantJob();
System.schedule('Informant Feed Update 0', '0 0 * * * ?', j);
System.schedule('Informant Feed Update 20', '0 20 * * * ?', j);
System.schedule('Informant Feed Update 40', '0 40 * * * ?', j);
```
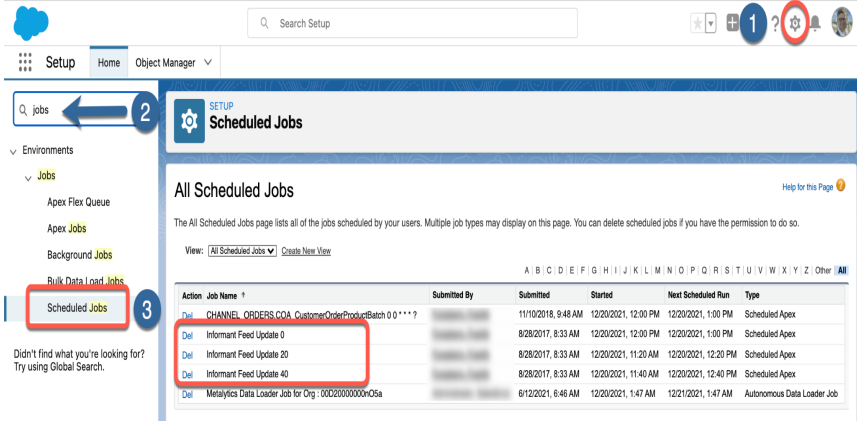
Highlight the Code

Click
"Execute Highlighted"

```
1  Intelliwell.InformantJob j = new Intelliwell.InformantJob();
2  System.schedule('Informant Feed Update 0', '0 0 * * * ?', j);
3  System.schedule('Informant Feed Update 20', '0 20 * * * ?', j);
4  System.schedule('Informant Feed Update 40', '0 40 * * * ?', j);
```

Check the result

Setup > *type* "Jobs" >
select "Scheduled Jobs"

Customize Page Layout for Account

Setup > Objects and Fields > Object Manager > Account > Page Layout

On the Page Layout page, click on the Layout you want to change
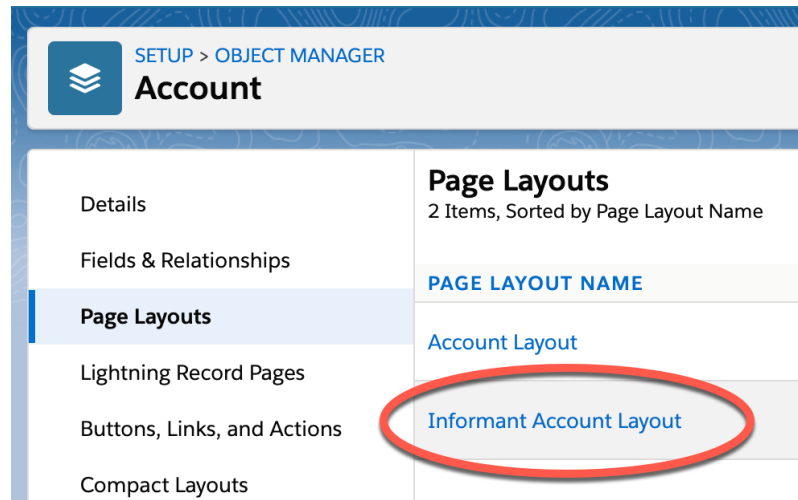
Click "Related Lists"
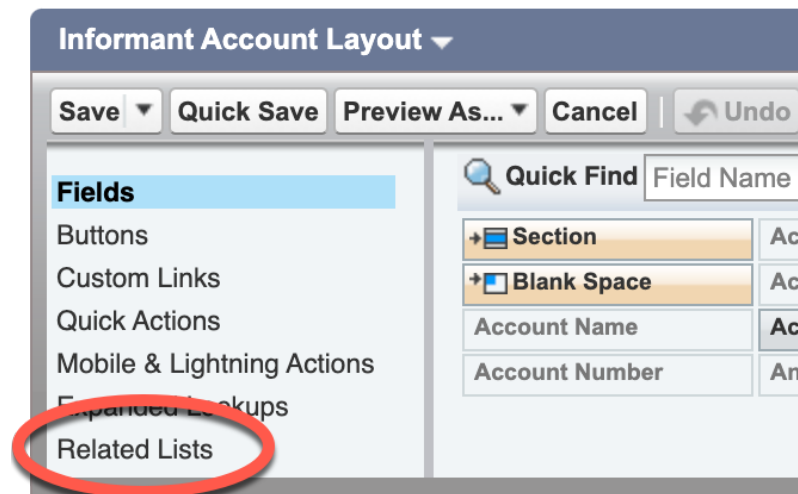
Drag Informant
    1.   Hits
    2.   Subscriptions
    3.   Announcements
to the position you want
One at the time
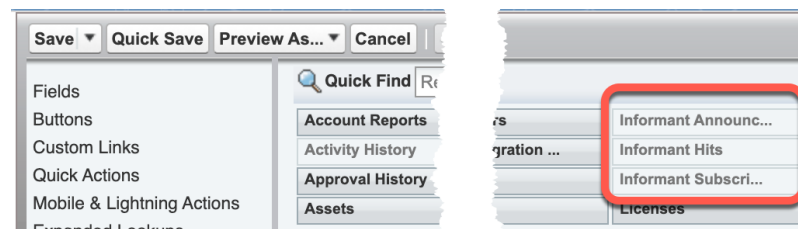
For each list click the tool icon and select your preferred settings

NOTE:
The following settings are examples. You can make your own setting.

Related List Properties - Informant Hits   ✕

Help ❓

Columns   ⊟

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields   **Selected Fields**
Created By   Created Date
Created By Alias   **Add**   Hit Content   **Up**
Hit ID   ▶   Hit Link   ▲
Hit Inserted (Deprecated)   Informant Subscription
Hit Inserted Date   ◀   Improve this subscription ▼
Informant Hit ID   **Remove**   **Down**
Last Activity Date
Last Modified By

Sort By: Created Date   ▾

⚪ Ascending

🔵 Descending

Apply column information to other page layouts:

Buttons   ⊞

            OK   Cancel   Revert to Defaults

Related List Properties - Informant Hits   ✕

Help ❓

Columns   ⊞
Buttons   ⊟

Standard Buttons:

Select standard buttons to display on the related list.

☐ New

☑ Change Owner

            OK   Cancel   Revert to Defaults

Related List Properties - Informant Subscriptions   ✕

Help ❓

Columns   ⊟

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		**Selected Fields**	
Created By		Subscription Name	
Created By Alias		Filters	
Created Date	**Add**	Source URLs	**Up**
GUID (Deprecated)	▶		▲
Id	◀		▼
Improve this subscription	**Remove**		**Down**
Is Deleted in Informant			
Last Activity Date			

Sort By: --Default-- ▼

🔘 Ascending

⚪ Descending

Apply column information to other page layouts:

Buttons   ⊞

[OK] [Cancel] [Revert to Defaults]

Related List Properties - Informant Subscriptions   ✕

Help ❓

Columns   ⊞
Buttons   ⊟

Standard Buttons:

Select standard buttons to display on the related list.

☑ New

☑ Change Owner

Custom Buttons:

Select custom buttons to display on the related list. You can also re-order the selected buttons.

Available Buttons		**Selected Buttons**	
		Refresh from Informant	
		Delete Subscriptions	
	Add	Schedule Feed Updates	**Up**
	▶		▲
	◀		▼
	Remove		**Down**

[OK] [Cancel] [Revert to Defaults]

Email   Mobile

Chatter is selected as default-value. To change default settings type "Custom Settings" in the Quich Find box and click "Manage Informant Announcement Settings"

NOTE: If you want to use the Email option you need to set up an Organization-Wide Address. Please refer to your Salesforce Manual.

Recipients will be alerted via Email independently from Chatter.

Quick tips: Set Up Organization-Wide Email Addresses

- From Setup, enter Organization-Wide Addresses in the Quick Find box, then select Organization-Wide Addresses.
- To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Salesforce and choose your organization-wide address from the drop-down list.

SAVE
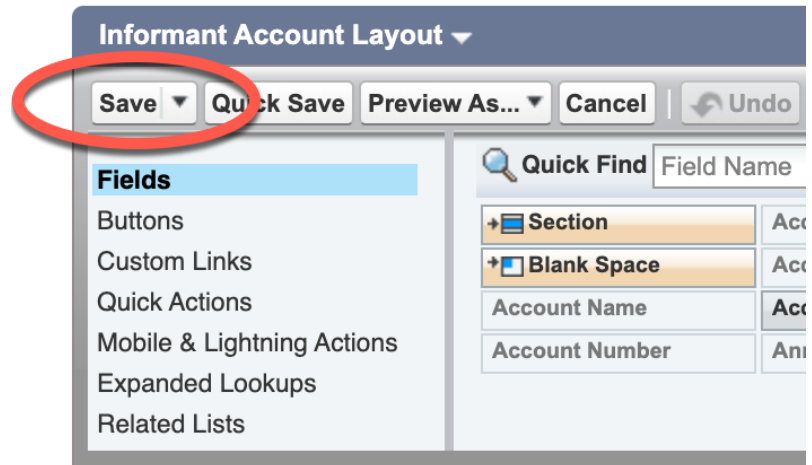
Assign Custom Object Permissions

Go to:

Setup > User > Profiles

Click Edit
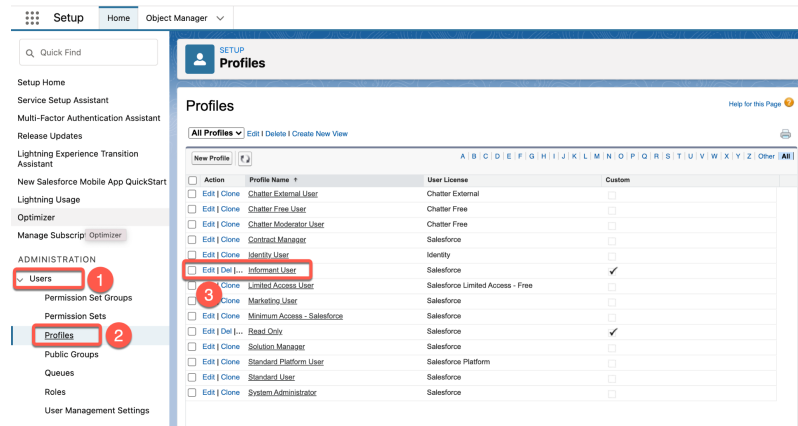
Scroll down to

Custom Object Permissions

and check the Informant boxes
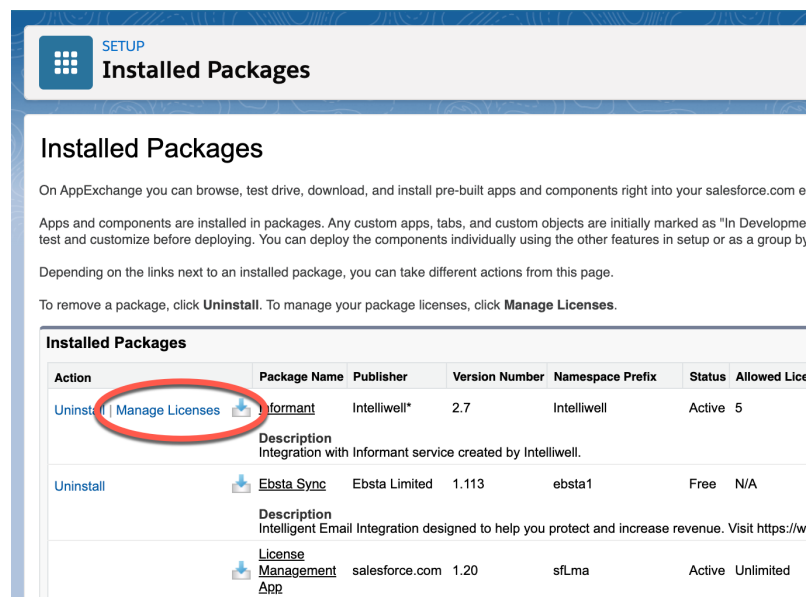
Scoll to Top or Bottom and

Save

Assign licences

Setup > Apps > Packaging > Installed Packages

Search and click "Installed Packages"
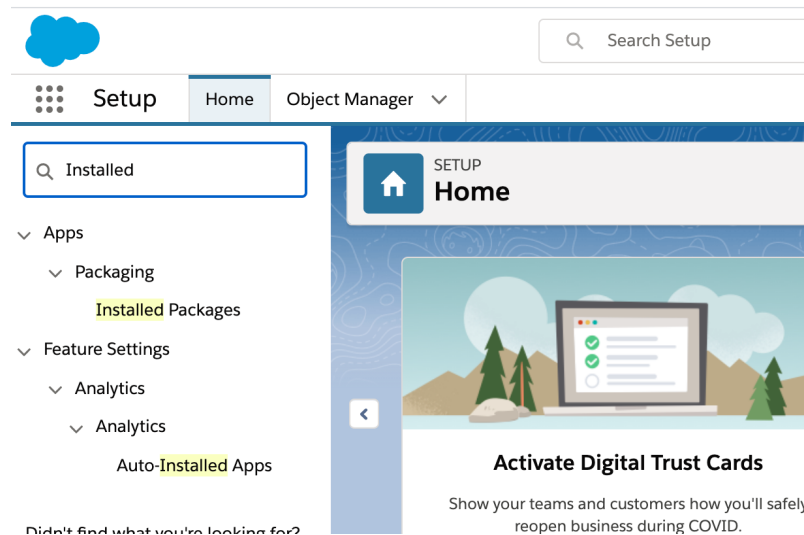
Click "Manage Licences"

Assign licences