

Getting started with Intelliwell Informant

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[Start Scheduled Jobs](#)

[Customize Page Layout for Account](#)

[Assign Custom Object Permissions](#)

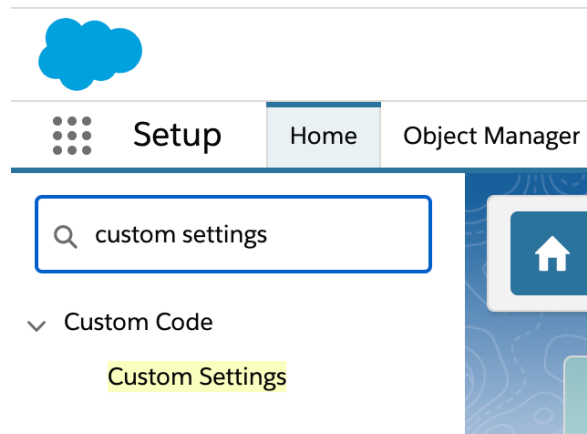
[Assign licences](#)

Create Custom Setting for Informant

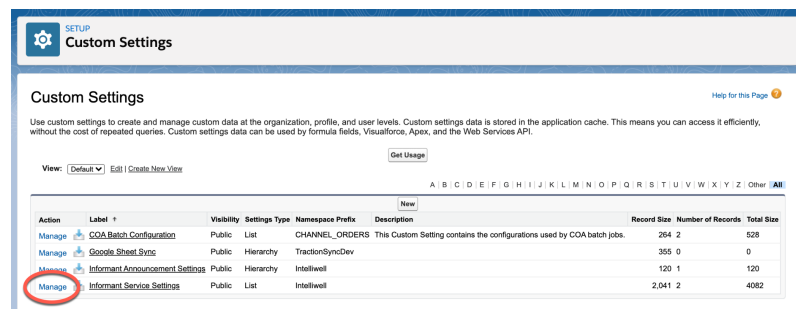
Setup > Custom Settings

A new Custom Settings file named “Default” needs to be created.

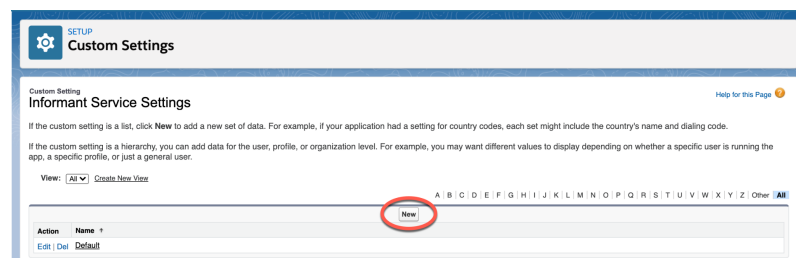
Search “Custom Settings”



Click “Manage” at “Informant Service Settings”



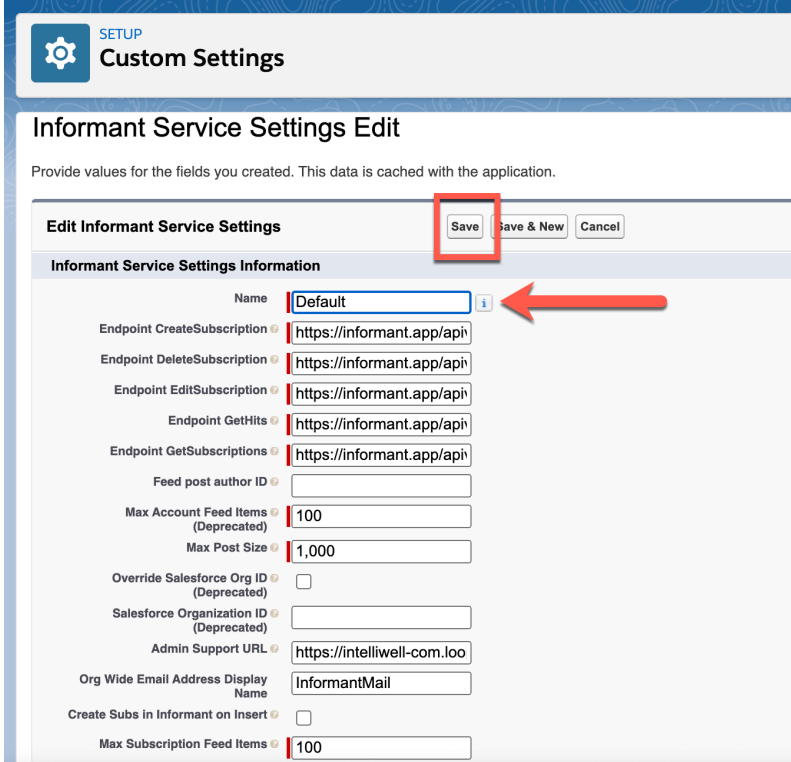
Click “New”



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

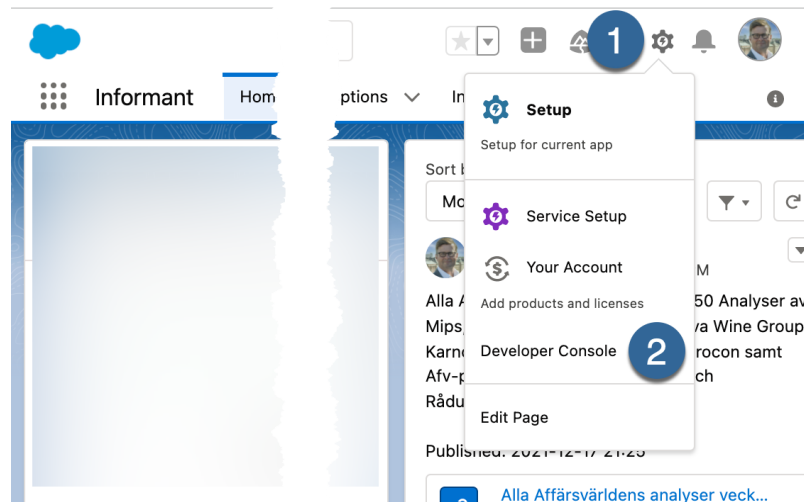
Informant Service Settings Information

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

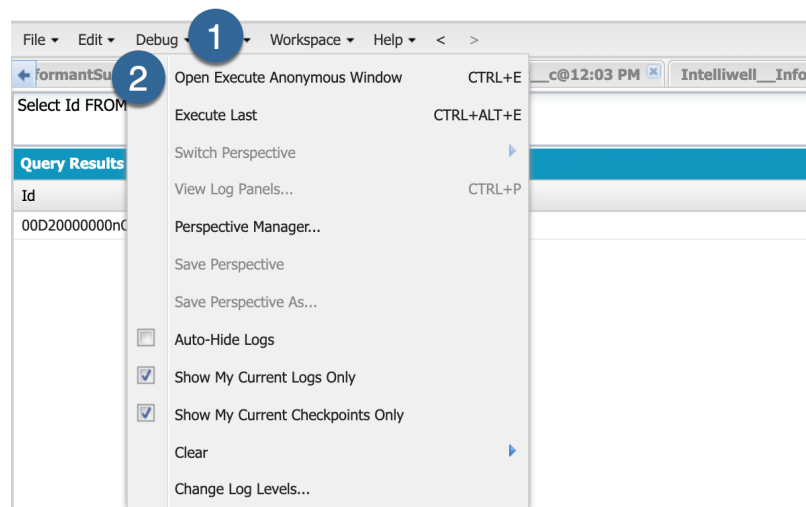
Start Scheduled Jobs

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"



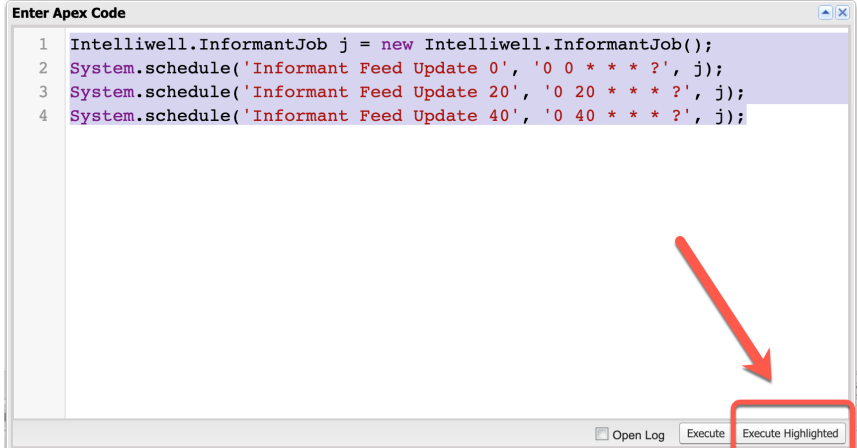
Enter this code exactly

```
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”



```

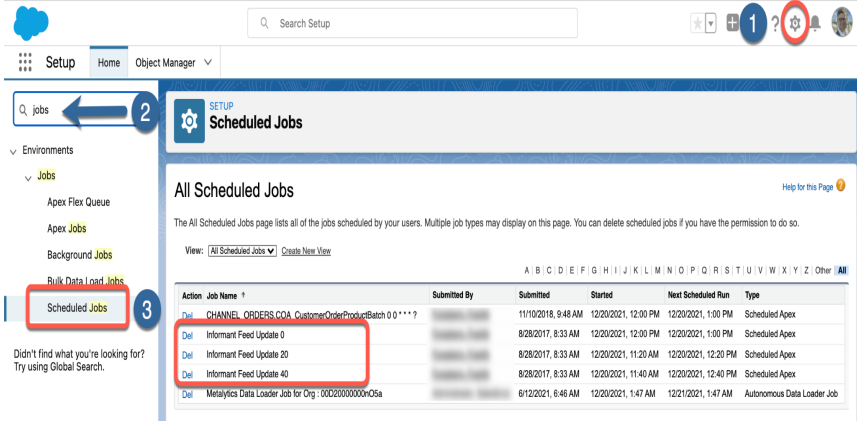
1  Intelliwell.InformantJob j = new Intelliwell.InformantJob();
2  System.schedule('Informant Feed Update 0', '0 0 * * * ?', j);
3  System.schedule('Informant Feed Update 20', '0 20 * * * ?', j);
4  System.schedule('Informant Feed Update 40', '0 40 * * * ?', j);

```

Open Log Execute **Execute Highlighted**

Check the result

Setup > type “Jobs” >
select “Scheduled Jobs”



Setup Home Object Manager

jobs

Scheduled Jobs

All Scheduled Jobs

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

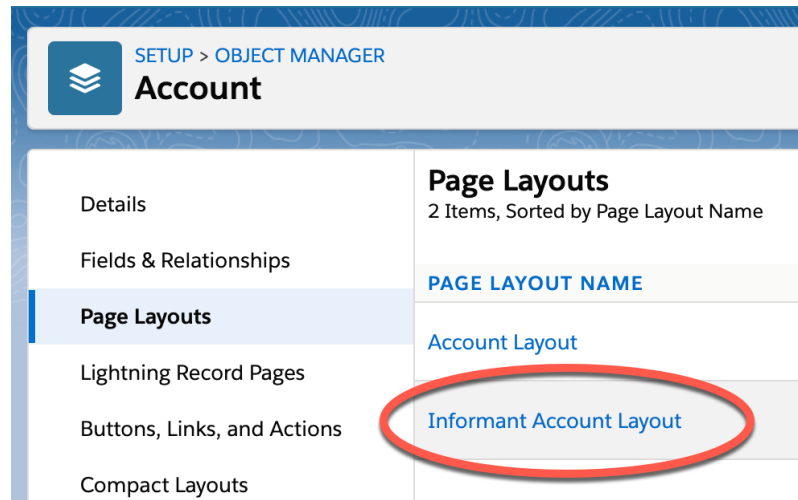
View: [All Scheduled Jobs] Create New View

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	CHANNEL_ORDERS.COA CustomerOrderProductBatch 0 0 * * * ?		11/10/2018, 9:48 AM	12/20/2021, 12:00 PM	12/20/2021, 1:00 PM	Scheduled Apex
Del	Informant Feed Update 0		8/28/2017, 8:33 AM	12/20/2021, 12:00 PM	12/20/2021, 1:00 PM	Scheduled Apex
Del	Informant Feed Update 20		8/28/2017, 8:33 AM	12/20/2021, 11:20 AM	12/20/2021, 12:20 PM	Scheduled Apex
Del	Informant Feed Update 40		8/28/2017, 8:33 AM	12/20/2021, 11:40 AM	12/20/2021, 12:40 PM	Scheduled Apex
Del	Metalytics Data Loader Job for Org: 00C20000000005a		6/12/2021, 6:48 AM	12/20/2021, 1:47 AM	12/21/2021, 1:47 AM	Autonomous Data Loader Job

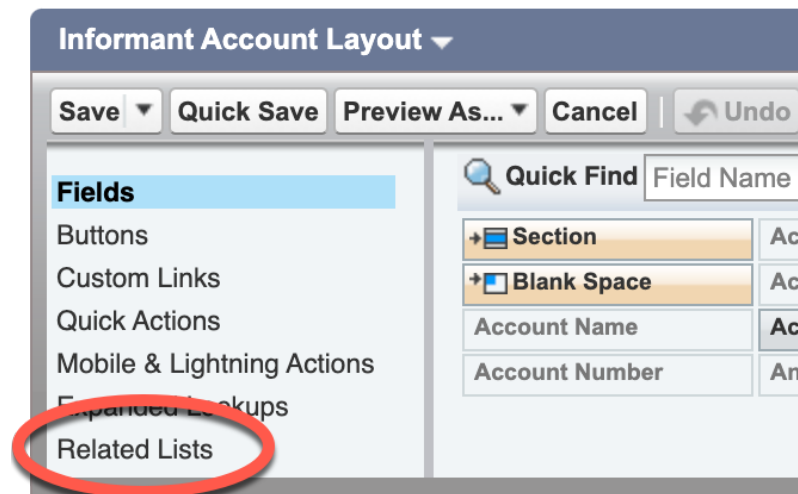
Customize Page Layout for Account

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

On the Page Layout page, click on the Layout you want to change

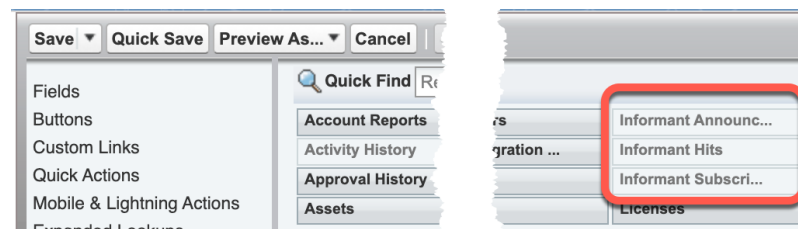


Click "Related Lists"



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

Related Lists



Informant Hits

NOTE:

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

Related List Properties - Informant Hits x

[Help](#) ?

Columns -

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

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

Sort By: Created Date ▼

Ascending
 Descending

Apply column information to other page layouts:

Buttons +

Related List Properties - Informant Hits x

[Help](#) ?

Columns +

Buttons -

Standard Buttons:

Select standard buttons to display on the related list.

New
 Change Owner

Related List Properties - Informant Subscriptions x

[Help](#) ?

Columns -

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

Available Fields Created By Created By Alias Created Date GUID (Deprecated) Id Improve this subscription Is Deleted in Informant Last Activity Date	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Selected Fields Subscription Name Filters Source URLs	Up <input type="button" value="▲"/> Down <input type="button" value="▼"/>
--	---	---	--

Sort By: --Default--

Ascending
 Descending

Apply column information to other page layouts:

Buttons +

Related List Properties - Informant Subscriptions x

[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	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Selected Buttons Refresh from Informant Delete Subscriptions Schedule Feed Updates	Up <input type="button" value="▲"/> Down <input type="button" value="▼"/>
--------------------------	---	--	--

Related List Properties - Informant Announcements x

[Help](#) ?

Columns -

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

Available Fields Created By Created By Alias Created Date Informant Announcement ID Last Modified By Last Modified By Alias Last Modified Date Record ID	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Selected Fields User Channels Recipient Email Addresses
---	---	---

Sort By: --Default-- ▼

Ascending
 Descending

Apply column information to other page layouts:

Buttons +

Related List Properties - Informant Announcements x

[Help](#) ?

Columns +

Buttons -

Standard Buttons:
 Select standard buttons to display on the related list.

New
 Change Owner

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

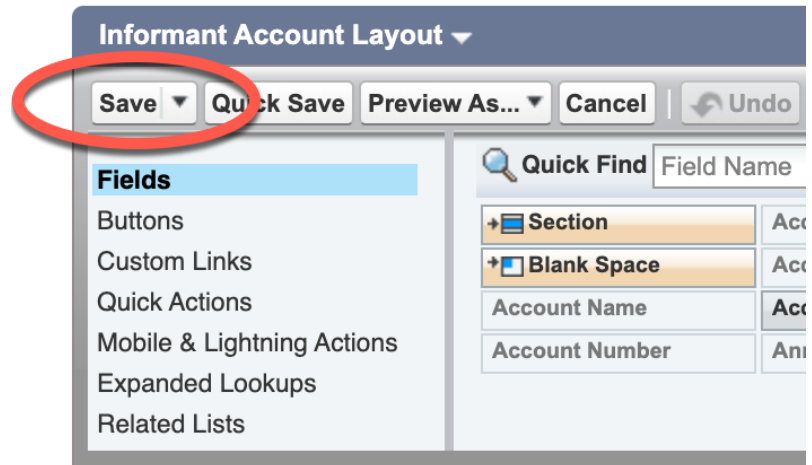
NOTE: If you want to use the Email option you need to set up an Organization-Wide Address. Please refer to your Salesforce Manual.

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.

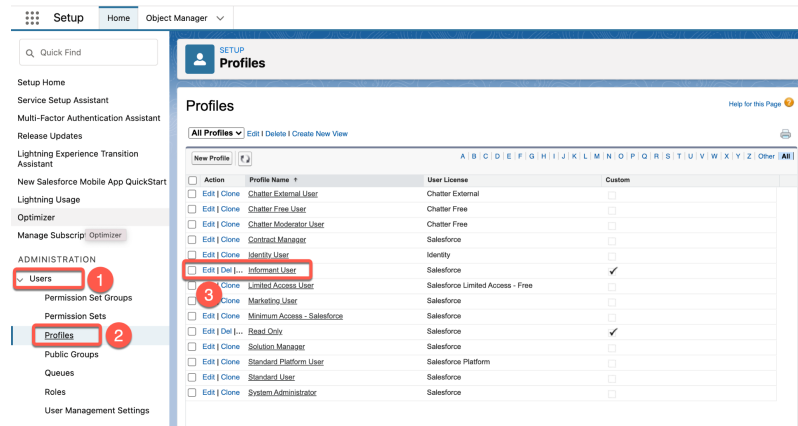
SAVE

Assign Custom Object Permissions

Go to:

Setup > User > Profiles

Click Edit



Scroll down to

Custom Object Permissions

and check the Informant boxes

Scroll to Top or Bottom and

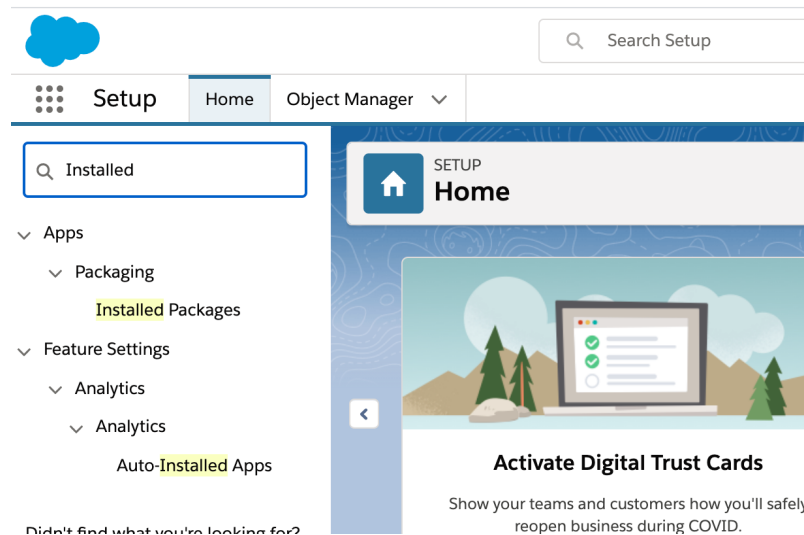
Save

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Account Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ad Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Order Product History	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EbataObjectMatchFields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EbataObjectSearchFields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EbataSearchSettings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EbataTask	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ebata User Search Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informant Announcements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informant Cache	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informant Hits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informant Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keywords	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Packages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Package Versions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner Contract Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner Pricebook Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partner Product Catalog	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search Phrases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Order Detail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Order Log	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SFGA Version	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Text Ads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Emails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Waypoints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

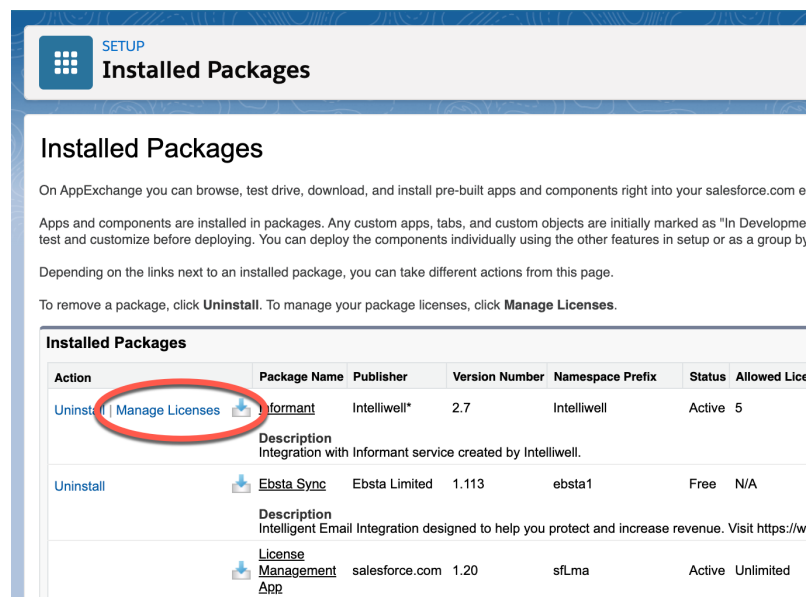
Assign licences

Setup > Apps > Packaging > Installed Packages

Search and click
“Installed Packages”



Click “Manage Licences”



Assign licences

