

MARZIPAN APP

Einführungsguide



MARZIPAN

Inhalt

1. Installationsvoraussetzung
2. Konfiguration
3. Integration mit bestehenden Objekten

1. Installationsvoraussetzung

Meine Domäne wird vorausgesetzt.

Bitte stellen Sie sicher, das Sie *Meine Domäne* aktiviert haben.

https://developer.salesforce.com/docs/atlas.en-us.lightning.meta/lightning/intro_reqs_my_domain.htm


Install Marzipan
 By msg

☐ 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

App Name	Publisher	Version Name	Version Number
Marzipan	msg	ver 1.0	1.3

Additional Details
 [View Components](#)

×

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api.msg-gillardon.services	☐

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

Continue
 Cancel



Install Marzipan

By



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
Marzipan		ver 1.0	1.0 (Beta 2)

[Additional Details](#)
[View Components](#)

Nach Abschluss der Installation werden Sie im Setup zu den Optionen der **managed packages** weitergeleitet.



Install Marzipan

By



Installation Complete!

[Done](#)

App Name	Publisher	Version Name	Version Number
Marzipan		ver 1.0	1.0 (Beta 2)



[Setup](#)
[Home](#)
[Object Manager](#)

[Setup Home](#)
[Release Updates \(Beta\)](#)
[Lightning Experience Transition Assistant](#)
[New Salesforce Mobile App QuickStart](#)
[Optimizer](#)

[ADMINISTRATION](#)

- Users
- Data
- Email

[PLATFORM TOOLS](#)

- Apps

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	 Marzipan	msg	1.0 (Beta 2)	mzp	8/15/2020, 1:56 AM	✓	0	1	4	Not Passed

Description: Marzipan Salesforce solutions

Uninstalled Packages

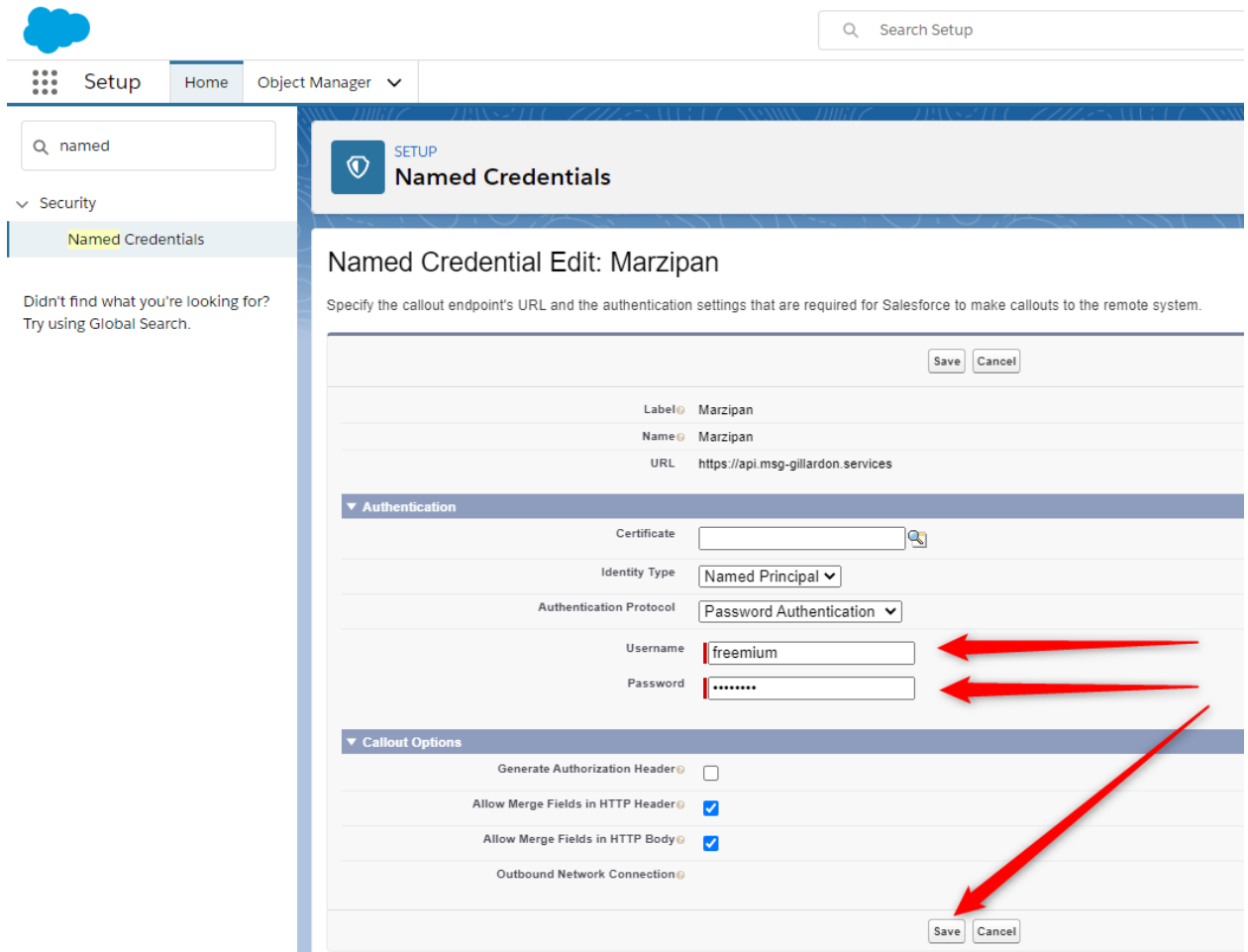
No uninstalled package data archives


[Visit AppExchange](#)

2. Configuration

Um auf die Konfigurationskomponente zugreifen zu können, müssen Sie folgende Schritte ausführen:

- Gehen Sie zum Setup – Named Credentials – bearbeiten
- Überschreiben Sie den Usernamen und das Passwort mit Ihren MARZIPAN Zugängen
- Username = YOUR_USERNAME
- Password = YOUR_PASSWORD



Search Setup

Setup Home Object Manager

named

Security

Named Credentials

Didn't find what you're looking for? Try using Global Search.

Named Credential Edit: Marzipan

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save Cancel

Label Marzipan

Name Marzipan

URL https://api.msg-gillardon.services

Authentication

Certificate

Identity Type Named Principal

Authentication Protocol Password Authentication

Username freemium

Password

Callout Options

Generate Authorization Header

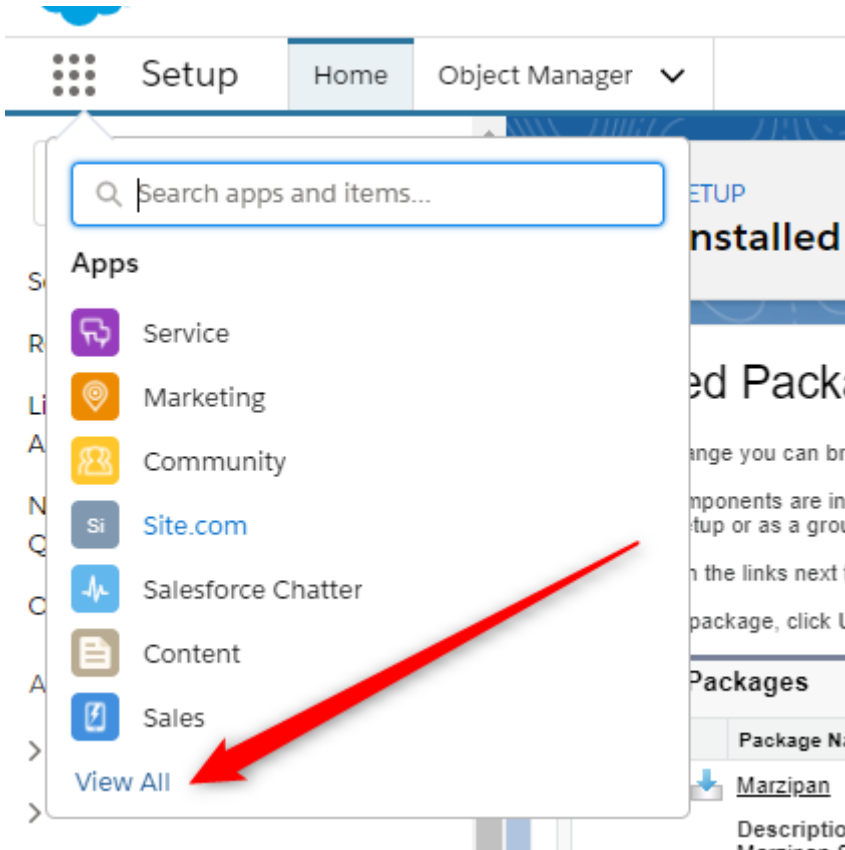
Allow Merge Fields in HTTP Header

Allow Merge Fields in HTTP Body

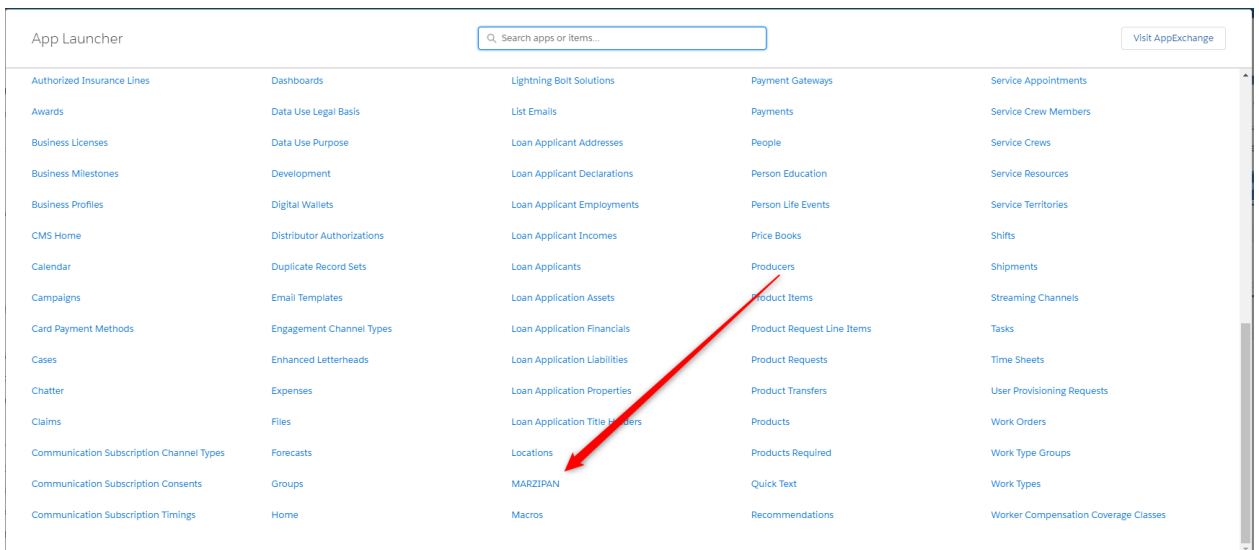
Outbound Network Connection

Save Cancel

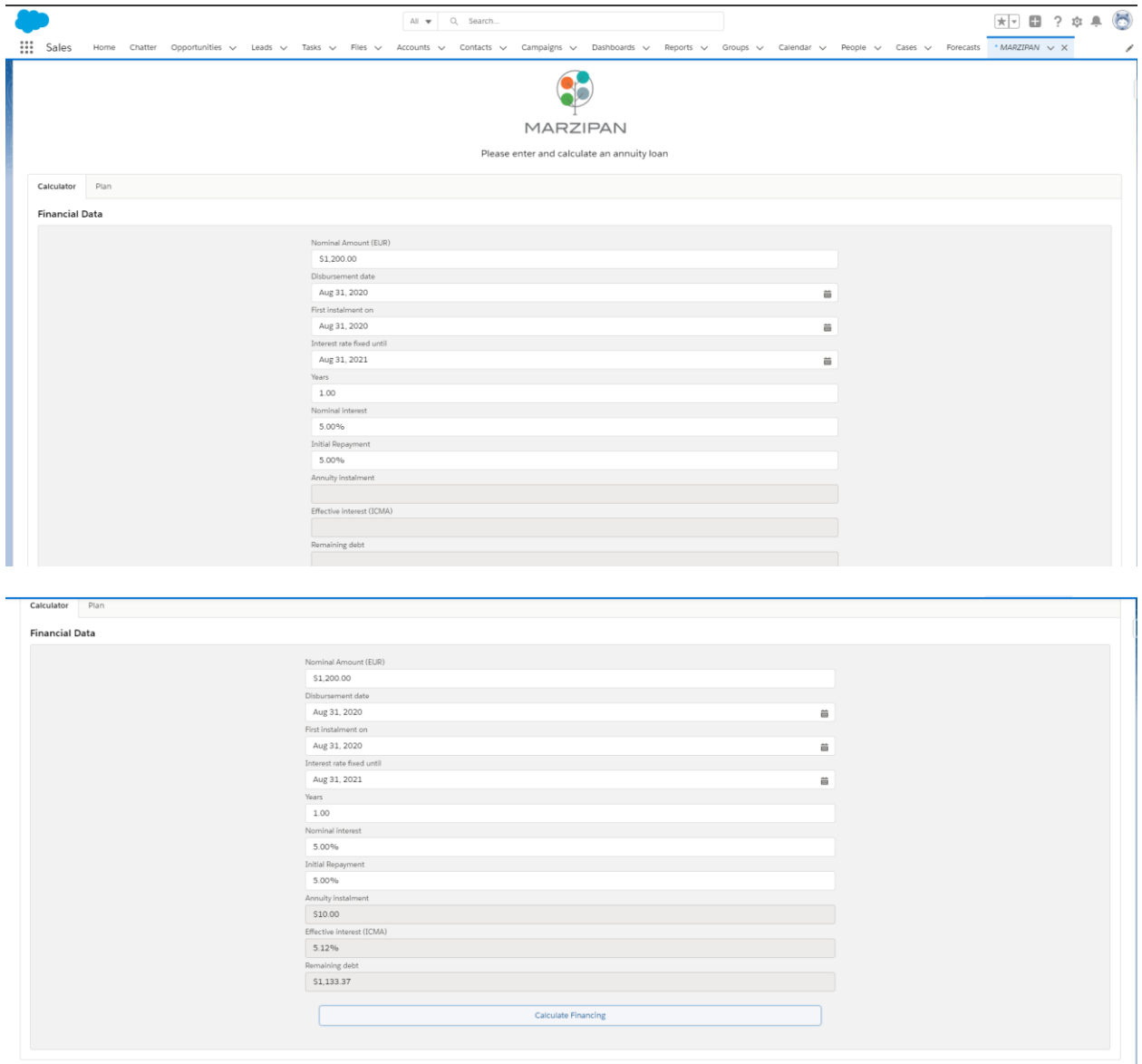
- Klicken Sie **Speichern**.
- Klicken Sie auf den **App Launcher** in der linken oberen Ecke und klicken Sie auf **alle ansehen**, um alle verfügbaren Tabs sehen zu können.



- Klicken Sie auf den **MARZIPAN** tab.



Um den Dienst zu testen, können Sie zum **Tab MARZIPAN** zurückkehren, zur **MARZIPAN-Rechnerkomponente** scrollen und gültige Werte eingeben, um die Rate zu berechnen.



The screenshot displays the MARZIPAN web application interface. At the top, there is a navigation bar with a search bar and various menu items: Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Groups, Calendar, People, Cases, Forecasts, and MARZIPAN. Below the navigation bar, the MARZIPAN logo is centered, followed by the instruction "Please enter and calculate an annuity loan".

The main content area is titled "Financial Data" and contains a form with the following fields:

- Nominal Amount (EUR): \$1,200.00
- Disbursement date: Aug 31, 2020
- First instalment on: Aug 31, 2020
- Interest rate fixed until: Aug 31, 2021
- Years: 1.00
- Nominal Interest: 5.00%
- Initial Repayment: 5.00%
- Annuity instalment: \$10.00
- Effective Interest (ICMA): 5.12%
- Remaining debt: \$1,133.37

At the bottom of the form, there is a button labeled "Calculate Financing".

Beachten Sie, dass dieser Rechner **auf jeder Lightning Seite** platziert werden kann.

3. Integration mit bestehenden Objekten

Der MARZIPAN-Rechner kann auch als Service für **jedes vorhandene Objekt** integriert werden. Dazu muss zu aller erst sichergestellt werden, dass **alle** erforderlichen **Felder** für ein **Objekt** erstellt wurden. Für eine weitere Referenz bei der Feld Erstellung, stellen Sie bitte sicher, den **richtigen Typ** ausgewählt zu haben, wie nachfolgend hervorgehoben:


SETUP
Custom Settings

Custom Setting Definition

MarzipanTestData

Help for this Page ?

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail

Manage

Label	MarzipanTestData	Object Name	MarzipanTestData
API Name	mzp__MarzipanTestData__c	Setting Type	Hierarchy
Visibility	Protected	Description	Test Data
Namespace Prefix	mzp	Created Date	8/15/2020, 1:56 AM
Last Modified Date	8/15/2020, 1:56 AM	Record Size	195

Custom Fields

New

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	Amount	mzp__Amount__c		Currency(18, 0)		User User, 8/15/2020, 1:56 AM
Edit	DisbursementDate	mzp__DisbursementDate__c		Date		User User, 8/15/2020, 1:56 AM
Edit	FirstInstallment	mzp__FirstInstallment__c		Date		User User, 8/15/2020, 1:56 AM
Edit	InitialRepayment	mzp__InitialRepayment__c		Number(3, 0)		User User, 8/15/2020, 1:56 AM
Edit	Interest	mzp__Interest__c		Percent(18, 0)		User User, 8/15/2020, 1:56 AM
Edit	Period	mzp__Period__c		Number(18, 0)		User User, 8/15/2020, 1:56 AM
Edit	Rate	mzp__Rate__c		Currency(16, 2)		User User, 8/15/2020, 1:56 AM

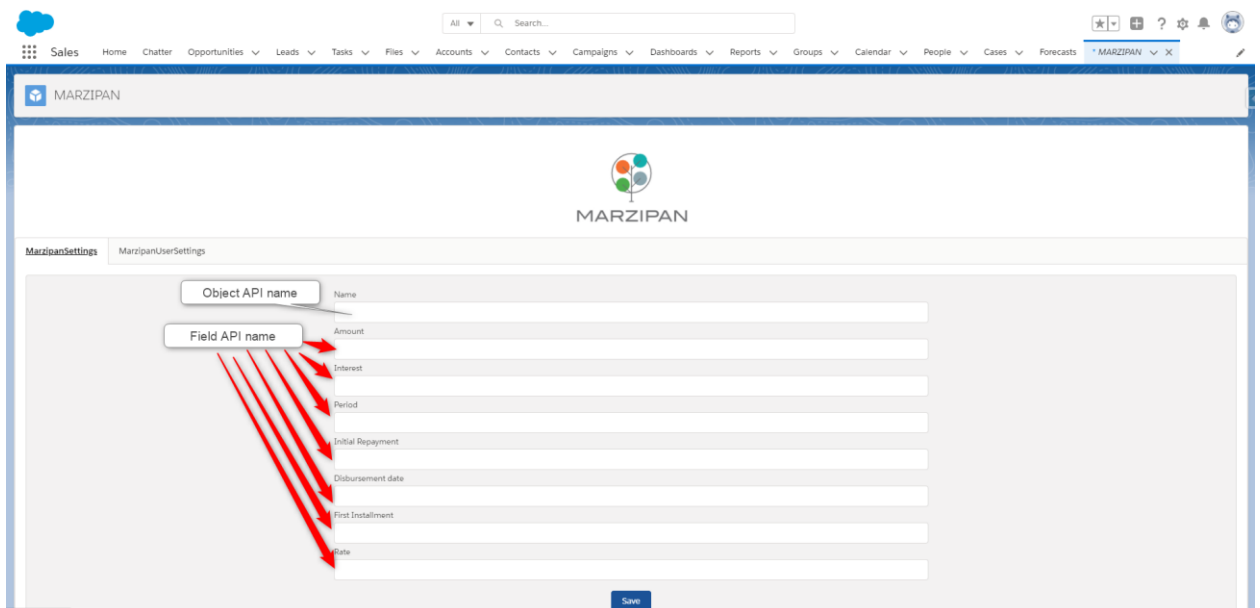
Beispielsweise haben wir die erforderlichen Felder für das Opportunity-Objekt erstellt.


[SETUP > OBJECT MANAGER](#)

Opportunity

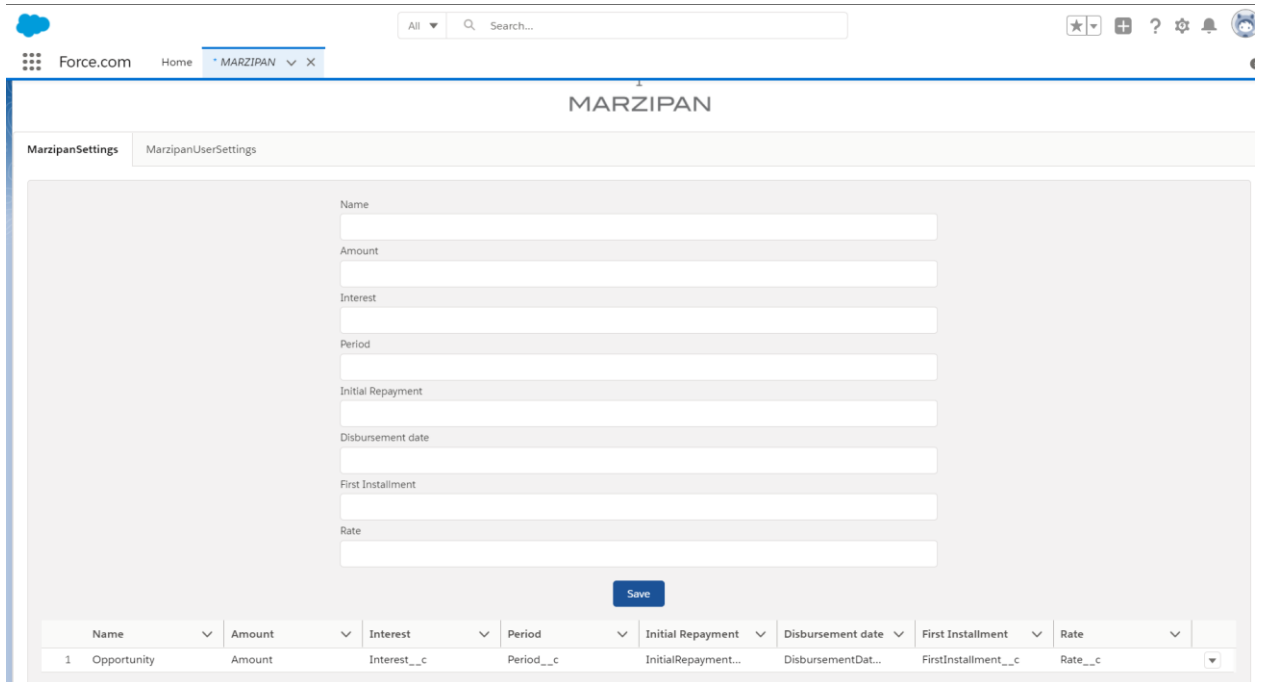
Details	Fields & Relationships 28 Items, Sorted by Field Name		
Fields & Relationships	Source	SourceId	Lookup(Each Milestone)
Page Layouts	Probability (%)	Probability	Percent(3, 0)
Lightning Record Pages	Price Book	Pricebook2Id	Lookup(Price Book)
Buttons, Links, and Actions	Opportunity Owner	OwnerId	Lookup(User)
Compact Layouts	Next Step	NextStep	Text(255)
Field Sets	Opportunity Name	Name	Text(120)
Object Limits	Rate	mzp__Rate__c	Currency(18, 0)
Record Types	Period	mzp__Period__c	Number(18, 0)
Related Lookup Filters	Interest	mzp__Interest__c	Percent(18, 0)
Search Layouts	InitialRepayment	mzp__InitialRepayment__c	Number(18, 0)
Search Layouts for Salesforce Classic	FirstInstallment	mzp__FirstInstallment__c	Date
Triggers	DisbursementDate	mzp__DisbursementDate__c	Date
Validation Rules			

Gehen Sie danach vom App launcher aus zurück zum **MARZIPAN Tab** und wählen Sie im **MARZIPAN Setting Tab** die **erste Konfigurationskomponente** aus und geben Sie den **Feld API Namen** ein.



The screenshot shows the MARZIPAN configuration interface. The 'Object API name' field is labeled 'Name'. The 'Field API name' field is labeled 'Amount'. Red arrows point from the 'Field API name' label to the 'Field API name' field and to the 'Amount' field. The 'Field API name' field is also labeled 'Interest', 'Period', 'Initial Repayment', 'Disbursement date', 'First Installment', and 'Date'.

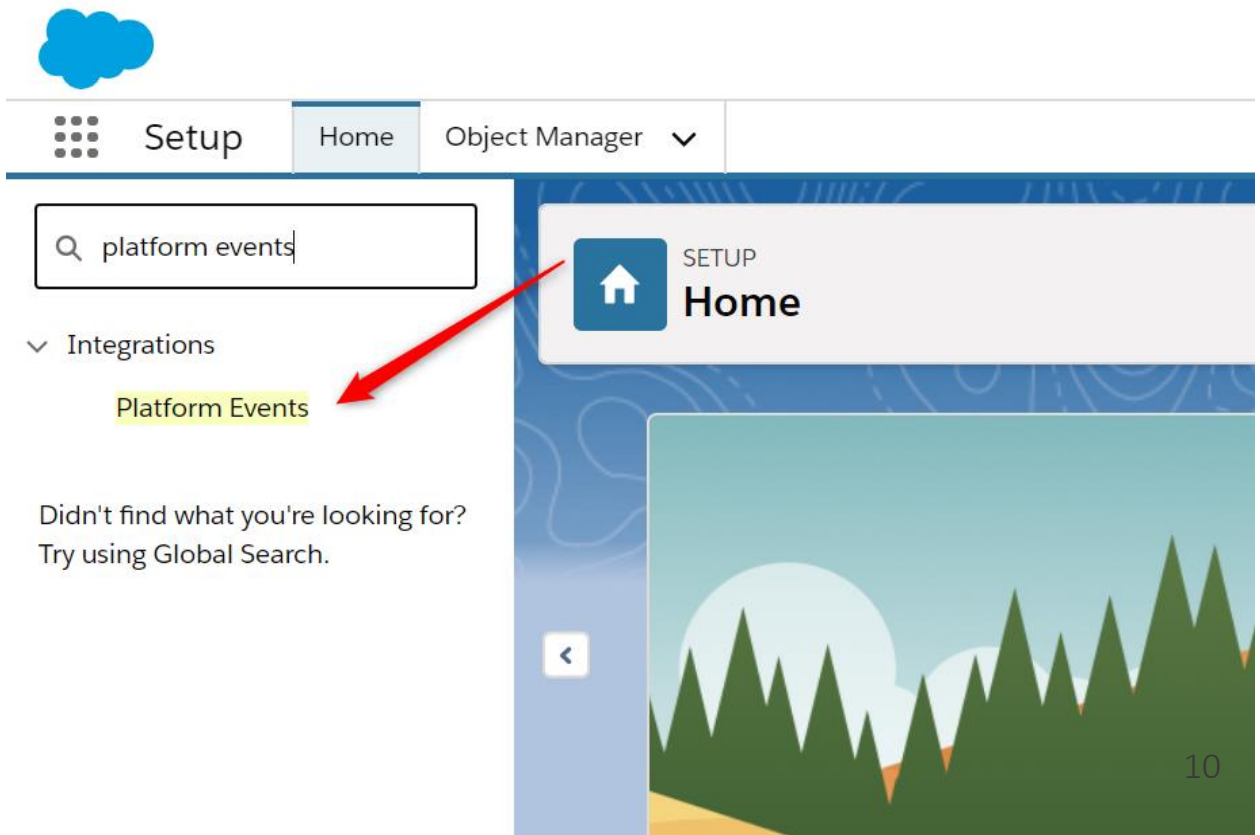
Nach der Speicherung ist die **Konfiguration** zu sehen.



Name	Amount	Interest	Period	Initial Repayment	Disbursement date	First Installment	Rate	
1	Opportunity	Amount	Interest__c	Period__c	InitialRepayment...	DisbursementDat...	FirstInstallment__c	Rate__c

Es wird der Name der Konfiguration verwendet, um den **Objekttyp** zu bestimmen. Bitte geben Sie dort den **Namen der Objekt API** ein.

Der Berechnungsservice verwendet ein **Plattformereignis**, um zu ermitteln, wann der MARZIPAN Service aufgerufen werden soll.



Setup Home Object Manager

platform events

Integrations

Platform Events

Didn't find what you're looking for? Try using Global Search.

SETUP Home

10

Platform Events

CalculateRate (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Platform Event Definition Detail

Singular Label	CalculateRate	Description	
Plural Label	CalculateRates	Deployment Status	Deployed
Object Name	CalculateRate		
Namespace Prefix	mzp		
API Name	mzp__CalculateRate__e		
Event Type	High Volume		
Publish Behavior	Publish After Commit	Modified By	User User: 6/15/2020, 1:56 AM
Created By	User User: 6/15/2020, 1:56 AM		

Package Information

Installed Package	MZP2000	Available in Versions	1.0 - Current
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Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedBy	CreatedBy	Lookup(36)		
Created Date	CreatedDate	CreatedDate	DateTime		
Record ID	RecordId	RecordId	External Lookup		

Custom Fields & Relationships

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
RecordId	RecordId	mzp__RecordId__c		Text(255)			User User: 6/15/2020, 1:56 AM

Triggers

No triggers defined

Subscriptions

Subscriber	Latest Processed Id	Latest Published Id	State
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Dieses **Plattform Even** bereits mit dem Paket installiert.

Der nächste Schritt besteht darin, einen **Process Builder** zu konfigurieren, der unser Objektfeld überwacht und ein neues Plattformereignis auslöst, das den Rechnerservice auslöst, wodurch das zugewiesene Ratenfeld mit einem berechneten Ratenwert aktualisiert wird.

Für die Opportunity legen wir beispielsweise die folgende Process Builder-Konfiguration fest:

Let's start this process when t

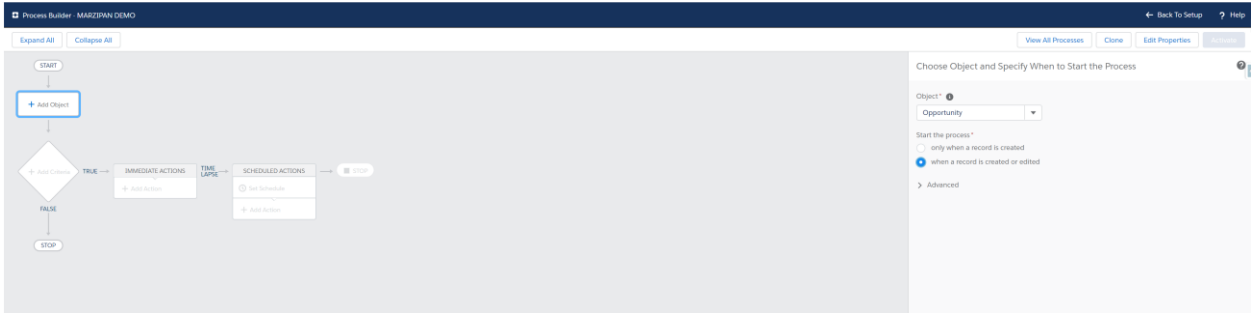
New Process

Process Name *

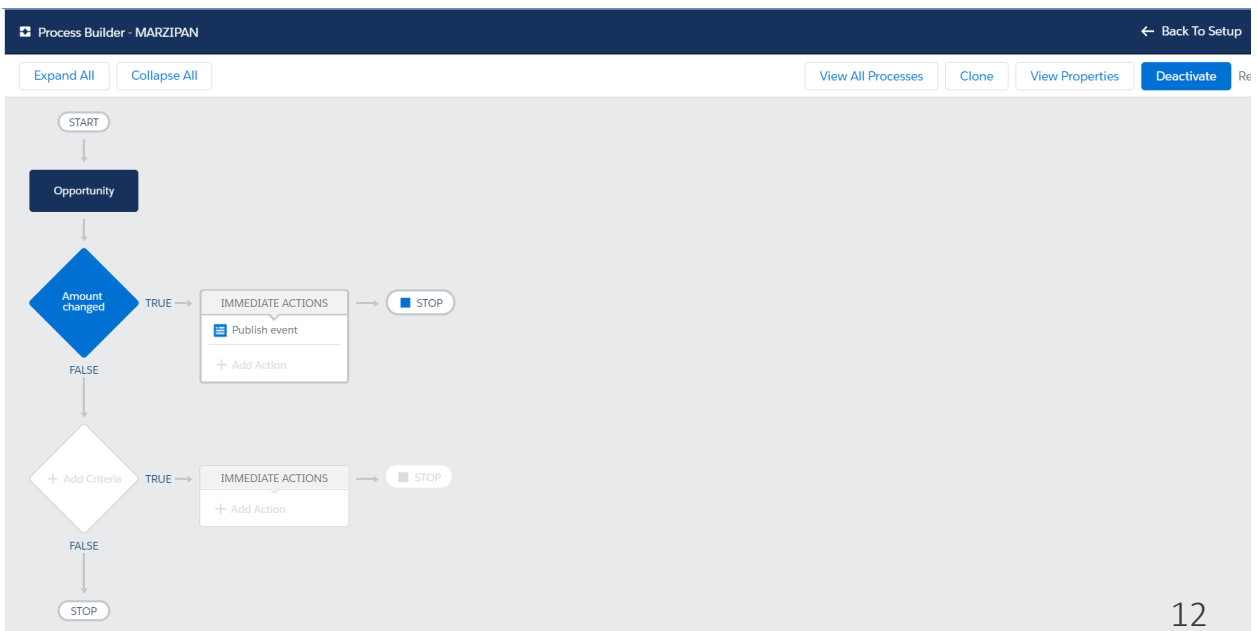
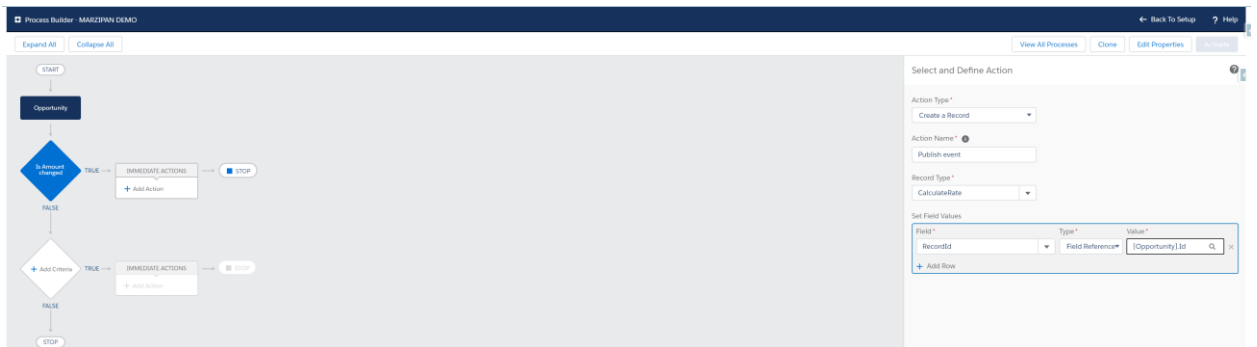
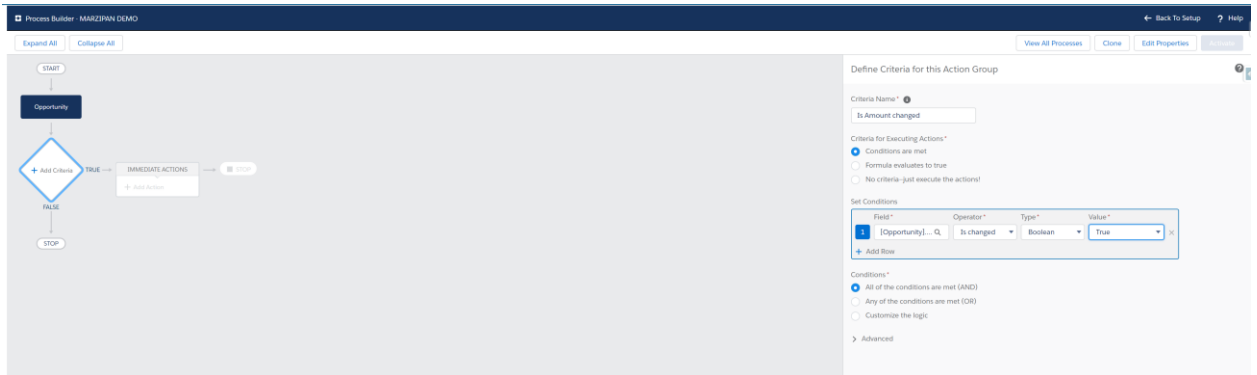
API Name *

Description

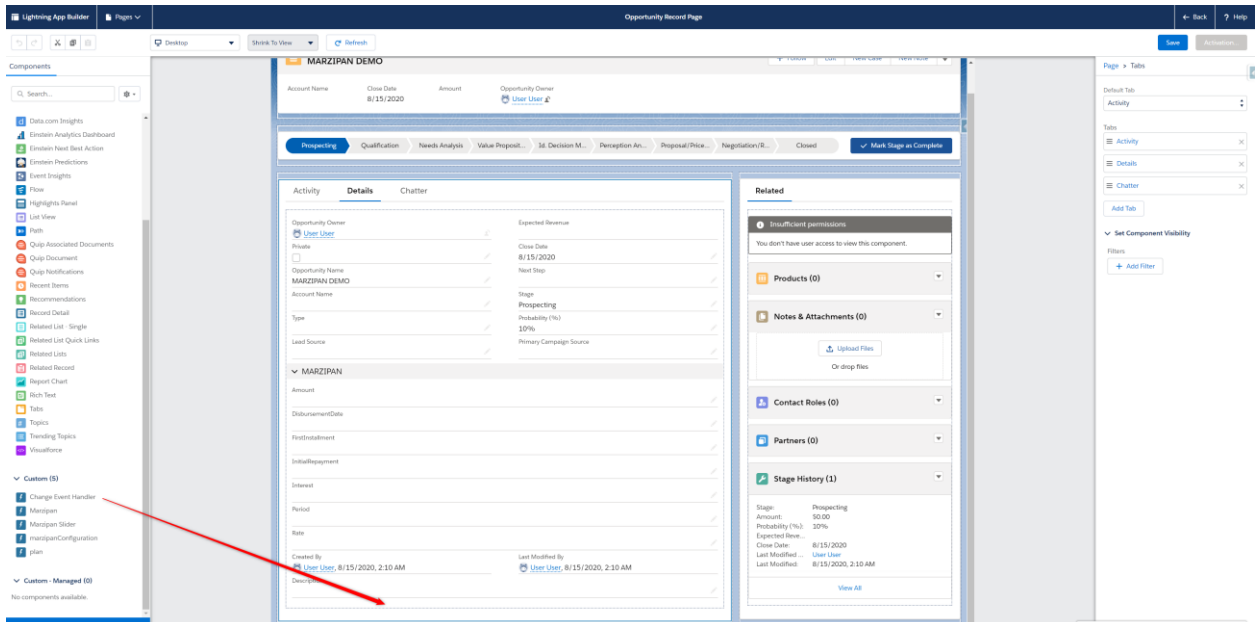
The process starts when *



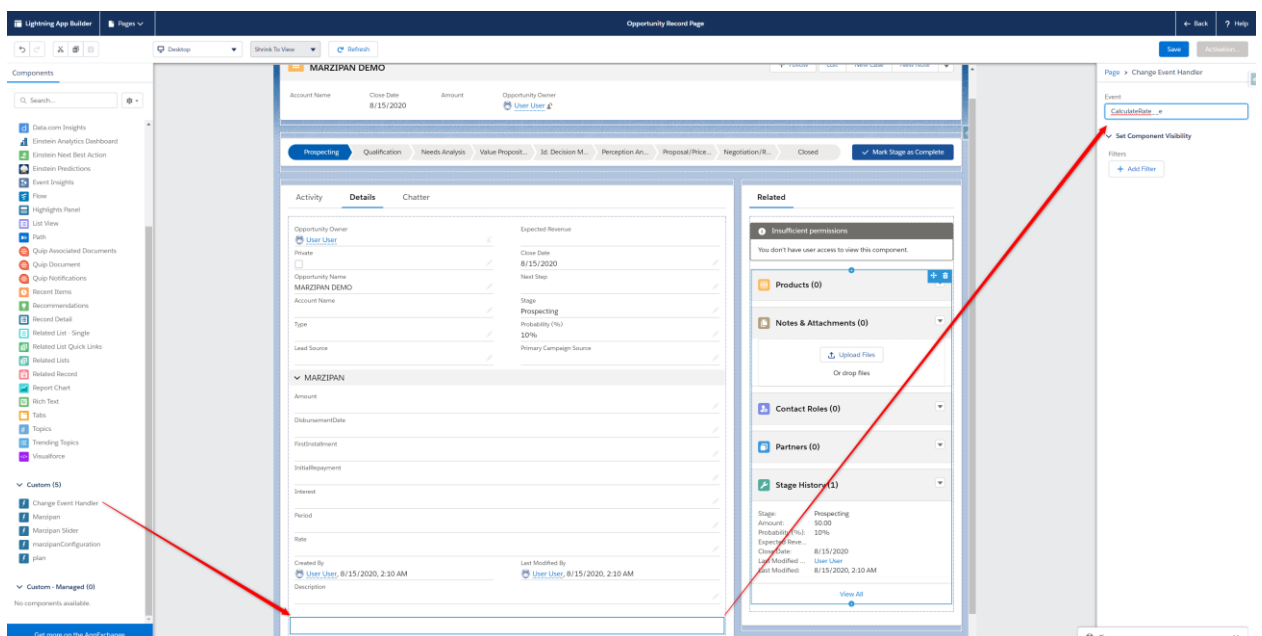
Sie können Konfigurationen und Konditionen individuell einfügen.



Der letzte Schritt besteht darin, die **Lightning Seite** zu bearbeiten und die **Komponente** hinzuzufügen, die die **Plattformereignisse** überwacht, den **Berechnungsdienst** auslöst und das definierte **Ratenfeld aktualisiert**. Zum Beispiel die Opportunity-Lightning Seite:



Beachten Sie, dass die Change Event Handler-Komponente im **Datensatzdetailbereich** platziert werden muss und eine leere Komponente ist. Wir müssen den **Namen der Plattformereignis-API** eingeben, den die Komponente überwachen soll. In unserem Beispiel ist dies: `mzp__CalculateRate__e`



Nachdem die Lightning Seite gespeichert und aktiviert wurde, kann die neue Funktionalität genutzt werden.

Fragen?

Bitte kontaktieren sie uns!



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