

Stack Moxie's Salesforce Managed Package

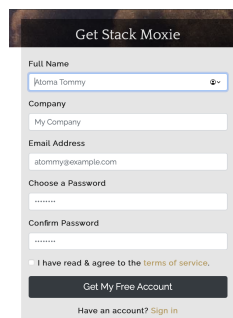
Installation Instructions

Stack Moxie's Managed Package allows users to establish a connection from Salesforce to Stack Moxie. This enables teams to monitor their integration, launch tests directly from a Salesforce page layout, and have the results returned without ever leaving Salesforce. This lets teams have confidence that their Salesforce objects are following processes as intended and that flows, processes and other integrated platforms are operating as expected.

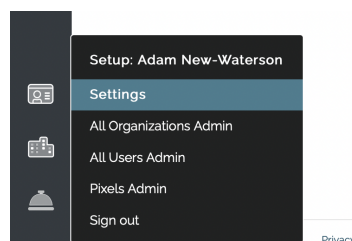
To utilize the solution, you need both a Salesforce instance and a Stack Moxie account.

Installation Guide:

1. First **create a free Stack Moxie account** to get started. Visit sta.mx/5iq.

A screenshot of a web form titled "Get Stack Moxie". The form contains several input fields: "Full Name" (with "Noma Tommy" entered), "Company" (with "My Company" entered), "Email Address" (with "atommy@example.com" entered), "Choose a Password", and "Confirm Password". Below the password fields is a checkbox labeled "I have read & agree to the terms of service." and a "Get My Free Account" button. At the bottom, there is a link "Have an account? Sign in".

2. Next you'll generate an API token for Salesforce. **Click your user profile** on the bottom left and choose Settings.



3. **Generate a new API token** by clicking the "Generate a Token" button. Give the token a Name. Copy the token and save it in a safe place. You will never be able to access this token again. In the event you lose this token, you will need to generate a new one to connect Salesforce's Managed Package for Stack Moxie.

My account

Personal Settings

Name: Adam New-Watson
Email: anw@stackmoxie.com
Notifications: Only When Outcomes Change

Password

Password:

API Tokens

Edit profile

Change password

Generate a Token

Generate a Token

Token Name/Purpose

Salesforce Managed Package

Cancel

Generate Token

4. **Install the Managed Package.** Visit the AppExchange listing at: . Then press the “Get it” button.
5. **Input credentials to establish connection.** Navigate to the app launcher and click to view all. Open the Stack Moxie App and add in the configuration details. You’ll need the ID of your organization. You can find it by looking in the navigation bar at the URL for your Stack Moxie account. The 32 digit string of numbers and letters is your organization ID. Click verify to establish the connection.



<https://app.stackmoxie.com/home/d1b31b8e-64ec-41c9-915d-dab8eafac009>



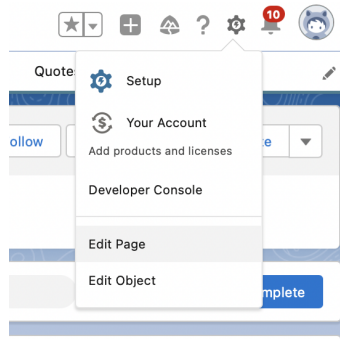
6. **Congratulations.** You’ve created a connection from Salesforce to Stack Moxie.

Stack Moxie’s Managed Package for Salesforce has several functionalities that you can add to your Salesforce Account. The current version of the Managed Package includes:

- “Test This” Lightning Web Component
- Admin Page
- More in development

Initiate a Stack Moxie test from any Salesforce Page layout with the “Test This” component.

1. **Determine which object type you want to be able to test.** Many teams want to test Leads, Contacts and Accounts in Salesforce. There’s no limitation to the object page layout to add this component to. In order to launch a test, you will first need to create a Stack Moxie Template. That template must include one step that tests the object you are launching a test from. If you add the “Test This” component to a Case page layout, there must be a Case Step in the template to be able to initiate a test.



2. **Add Lightning Web Component to a Page Layout.** If you want to add “Test This” to your Lead Page layout, start by creating a lead and then open that lead record. Click the gear icon (top right), and select Edit Page. On the left side scroll to the ‘custom’ component to find the **Stack Moxie - Test Launcher** component. Drag that wherever you want on the page, and click save. You will need to add it as an org default for it to display for all users or select a subset of users who can see the button. You will be able to use the feature now.
3. **Launch a Test.** You will first need to create a template in Stack Moxie before you can launch a test from Salesforce. From the lead you created, click the Test button to initiate a test. Select the Template from the drop down, add in relevant details, and click submit to run the test. Depending on the complexity of the test, the results will be returned to Salesforce. It will usually be done in a few minutes.
4. **Testing is complete.**