

INSTALLATION GUIDE



Start to use
PipeLaunch
Credit Check
in just 5 easy
steps



Package Installation

Install the latest version from AppExchange

Use the password provided by PipeLaunch (note that each version has a different installation password)

Select the option Install for All Users

Approve third-party access to the PipeLaunch API website (<https://api-creditcheck.pipelaunch.com>)

 **Install PipeLaunch Credit Check**
By PipeLaunch GmbH

 This app is protected by an installation key.


☐ 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.

App Name	Publisher	Version Name	Version Number
PipeLaunch Credit Check	PipeLaunch GmbH	version 1	1.3 Release Notes

Description
Welcome to the 1st Release of PipeLaunch Credit Check

Additional Details [View Components](#)

 **Install PipeLaunch Credit Check**
By PipeLaunch GmbH

 **Installing and granting access to all Users...**

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Description
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Permission Sets Assignment

Go to Setup and search for the **Permission Sets** section.

Search for the PipeLaunch Credit Check permission sets.

Assign the **PipeLaunch Credit Check: Order reports** permission to all users that should be able to order new reports and edit them.

Assign the **PipeLaunch Credit Check: View reports** permission to all users that should be able to view the reports.



License Assignment

Go to Setup and search for the **Installed Packages** section (Apps > Packaging > Installed Packages).

Search for the PipeLaunch Credit Check package and click **Manage Licenses**.

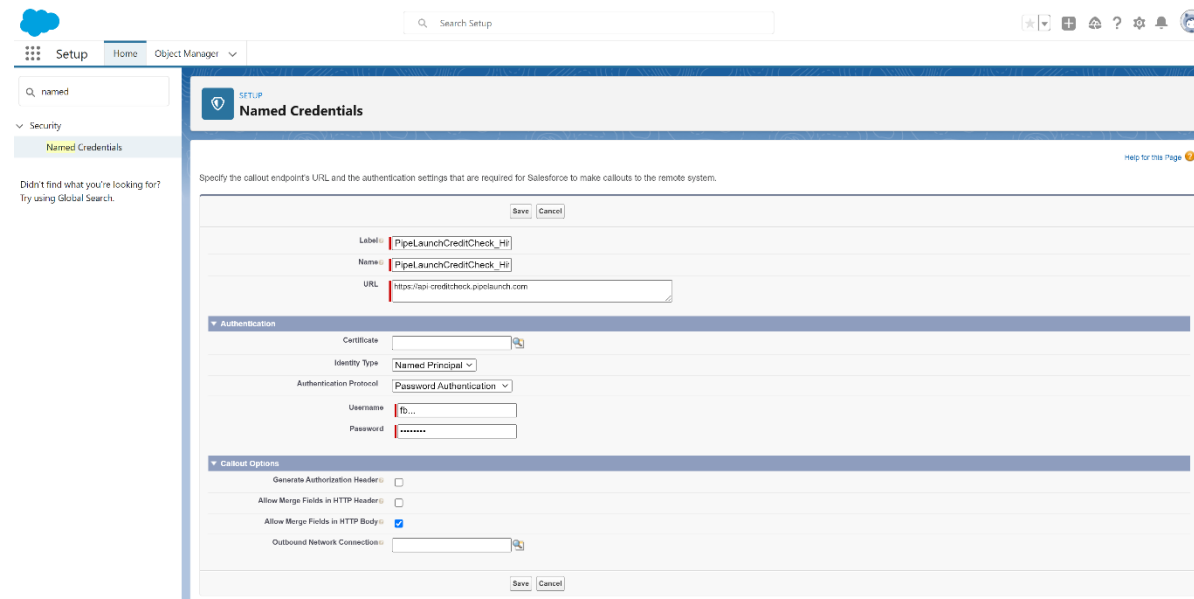
In the **Licensed Users** section click on the button Add Users and select all the users that will need access to this app (read and/or order Credit Reports) and to the included custom objects.



Named credentials

Go to Setup and Search for Security > **Named Credentials**

Create a new Named Credential for each Provider that you had subscribed. Please follow strictly these instructions: the input values need to match exactly with the names defined below (tip: copy and paste)



The screenshot shows the Salesforce Setup interface for Named Credentials. The left sidebar contains the Setup menu with a search bar and a list of categories including Security and Named Credentials. The main content area is titled "Named Credentials" and includes a "Help for this Page" link. Below the title, there is a section for "Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system." This section contains a form with the following fields:

- Label:
- Name:
- URL:

Below the URL field is an "Authentication" section with the following fields:

- Certificate:
- Identity Type:
- Authentication Protocol:
- Username:
- Password:

Below the authentication section is a "Callout Options" section with the following fields:

- Generate Authorization Header: ☐
- Allow Merge Fields in HTTP Header: ☐
- Allow Merge Fields in HTTP Body: ☒
- Outbound Network Connection:

At the bottom of the form are "Save" and "Cancel" buttons.



Label	PipeLaunchCreditCheck_CreditSafe	PipeLaunchCreditCheck_HitHorizons
Name *	PipeLaunchCreditCheck_CreditSafe	PipeLaunchCreditCheck_HitHorizons
URL*	https://api-creditcheck.pipelaunch.com	https://api-creditcheck.pipelaunch.com
Certificate		
Identity Type*:	Named Principal	Named Principal
Authentication Protocol*:	Password Authentication	Password Authentication
Username	Your username email ¹	Any value
Password	Your password	Your token
Generate Authorization Header		
Allow Merge Fields in HTTP Header		
Allow Merge Fields in HTTP Body*	Checked/True	Checked/True
Outbound Network Connection		

* Case-sensitive: copy of the exact value

¹ for sandbox access, append **.sandbox** at the end of the email address eg. mail@example.com.sandbox

Add component to the Page Layout

Go to an Account or Lead record.

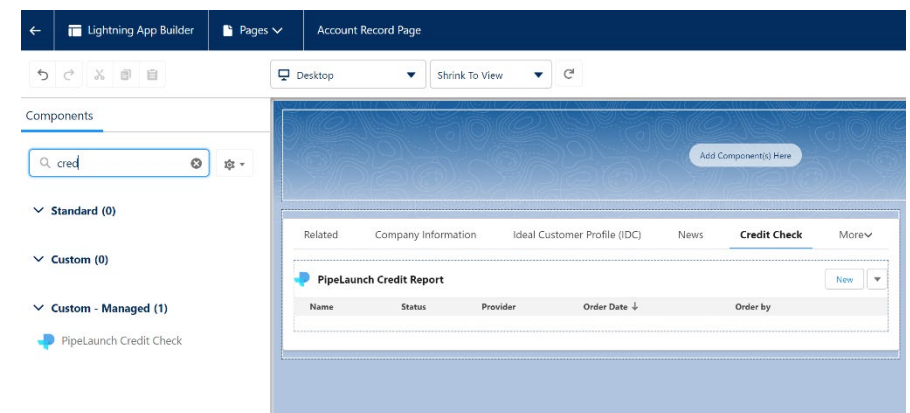
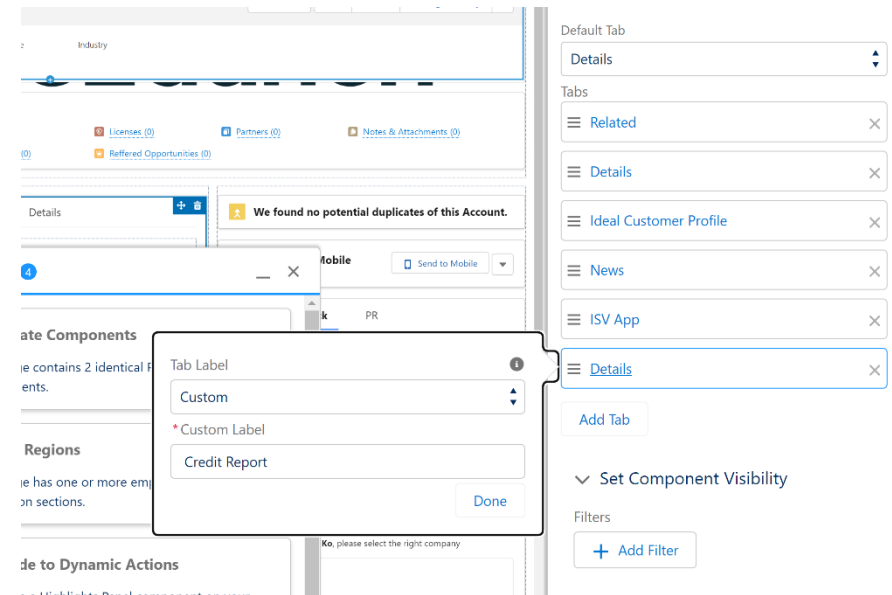
Click Edit Page

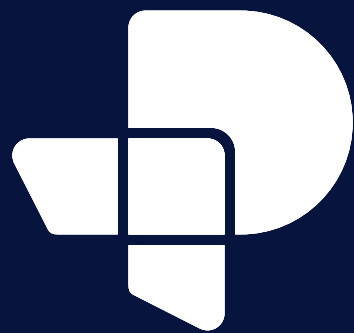
Create a new Tab with the name **Credit Check**

Search for the credit Check Custom managed component

Drag and drop the component to the newly created tab and click **Save**

Start to use the PipeLaunch Credit Check!





PipeLaunch

CREDIT CHECK

support@pipelaunch.com

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