# Snappy for Salesforce Post Installation Guide

## SECTION 1: PERMISSION SETS

To get started, locate the permission set you would like to configure. Permissions are assigned to either Snappy **Users** or **Snappy Administrators.**

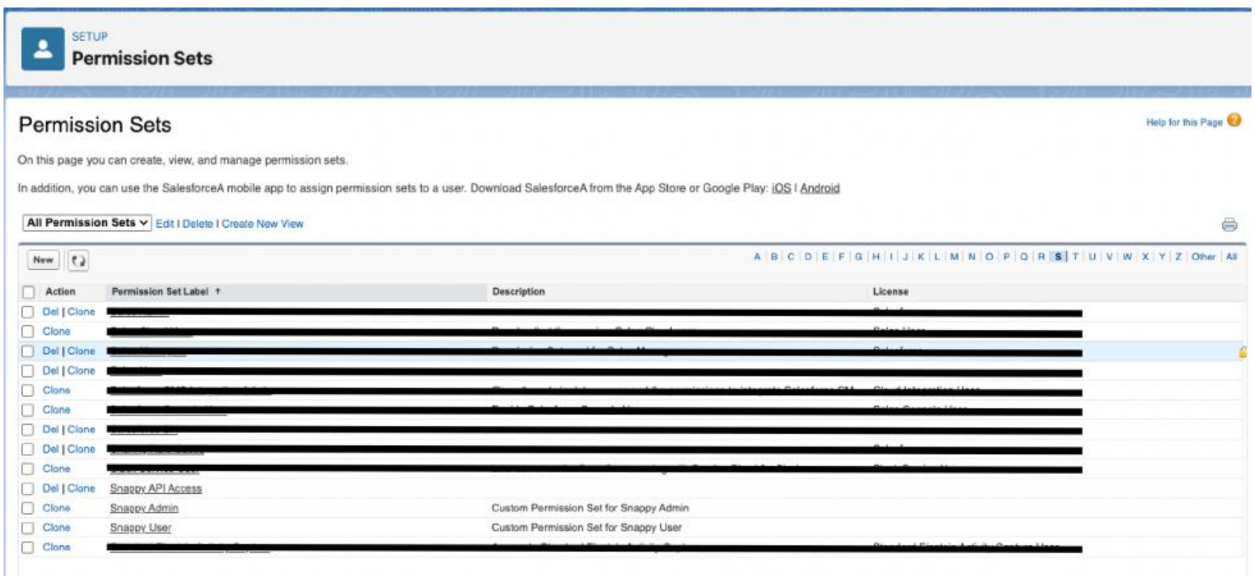



**Image 1: Locate Snappy Permission Sets**

For Snappy Users go to Users and select the desired permission set.

- Click on snappy user
- Click the **"Manage Assignments"** button.

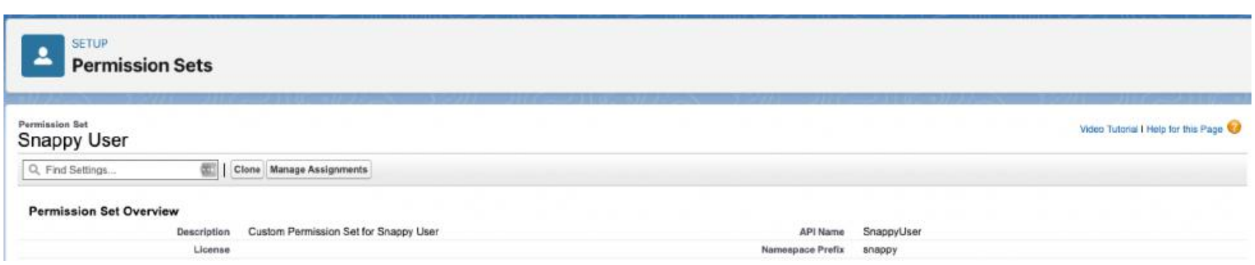



**Image 2: Desired Permission Sets**

Next, select the "**Add Assignment**" button

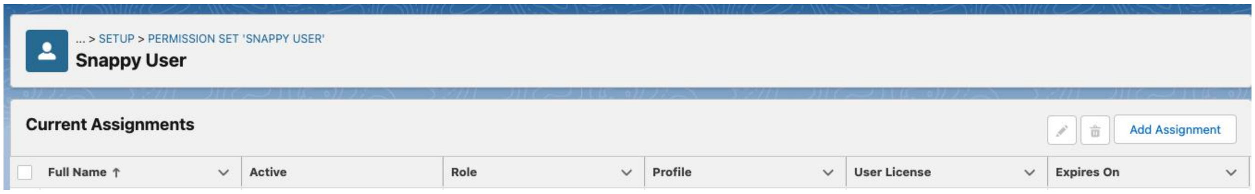



**Image 3: 'Add Assignments'**

Now you can add users who should have access to the Snappy Gifts object and Email templates.


**Image 4: Locate and Select Users**

Set any expiration dates that should apply to the user.

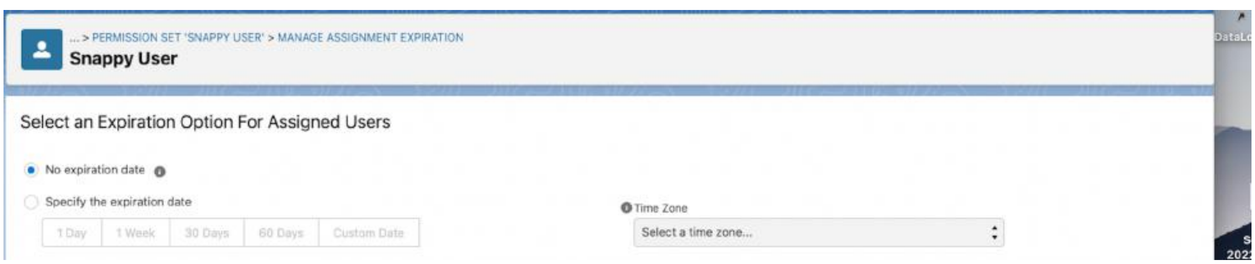



**Image 5: Select Expiration Settings**

You will see a success screen when all users have been assigned. The process will be the same for Administrators.

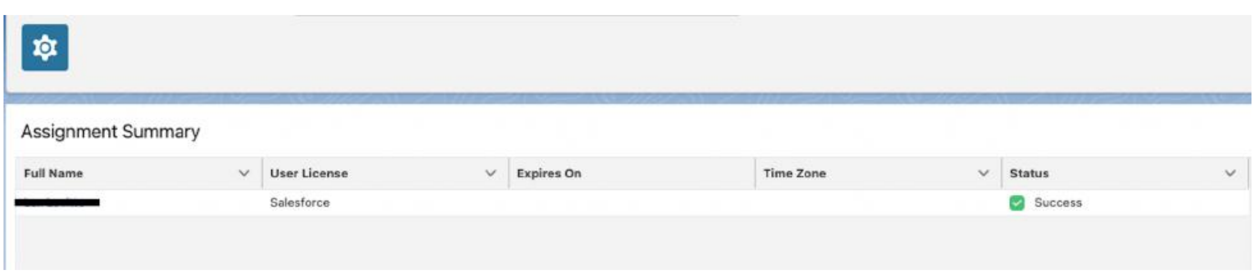



**Image 6b: Success Screen**

**Note:**

- User permission sets should be applied to users who need to *send gifts.*
- Admin permissions should b assigned to an Administrator who needs to send gifts *and* perform other admin activities such as view logs and address errors.

## SECTION 2: Add Snappy Gift Button LWC to Account, Contact, Lead, and Opportunity Record Pages

Go to settings >object manager> Account and select **Lightning Record Pages.**

You can edit an existing Account Record Page assigned to an app, profile, or record type, or create a new Lightning Record Page.

From the Components list, select the “Snappy Gift Button” and drag it onto a preferred section on the page

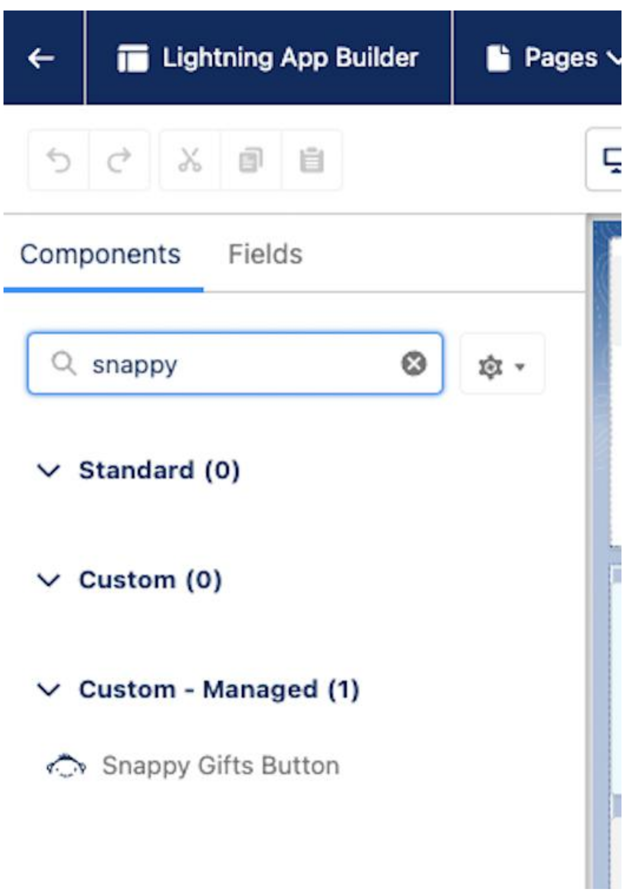



**Image 7: Lightning Record**

Save the changes and activate as required.

Repeat this process for the other objects (Contact, Lead, and Opportunity)

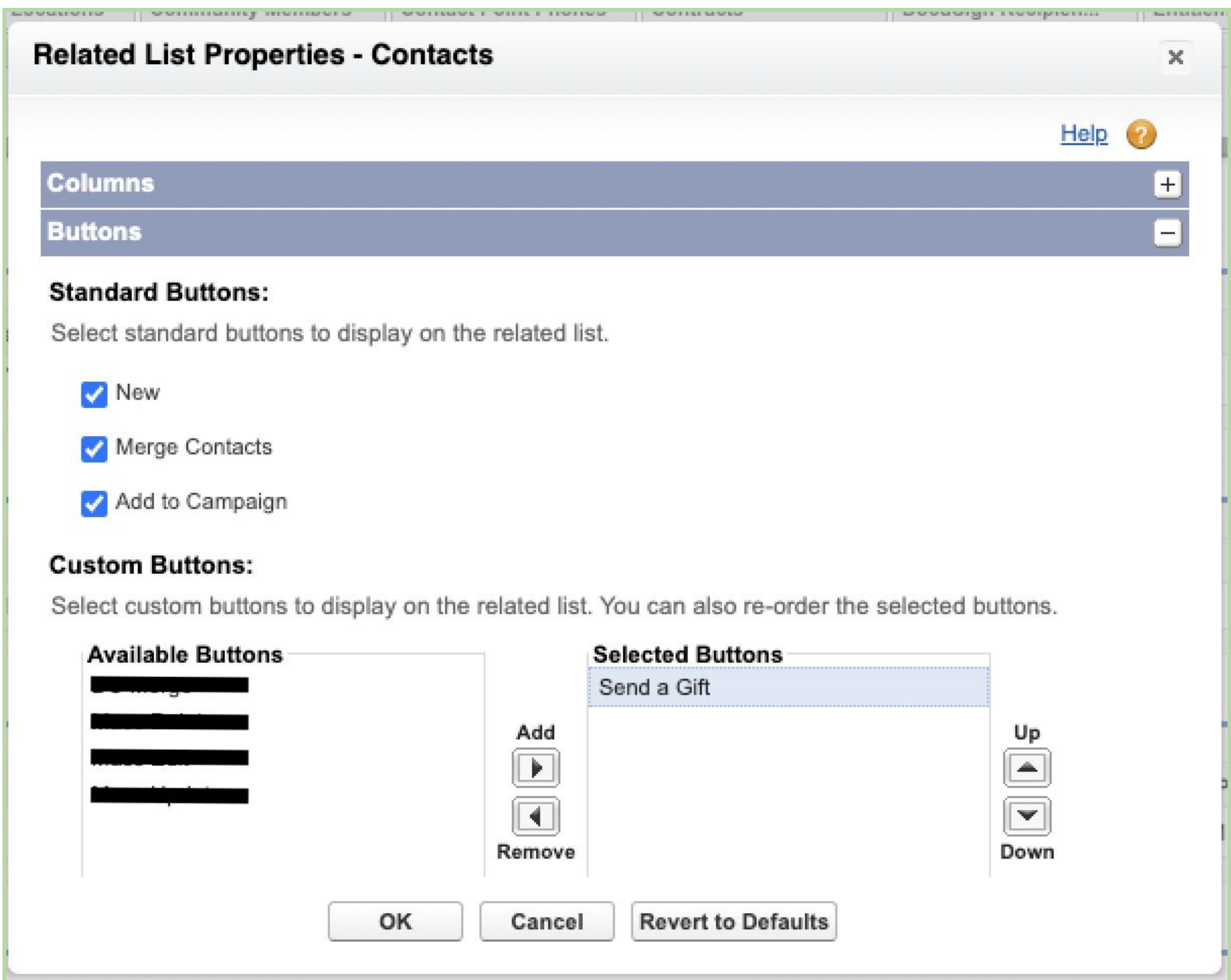
## SECTION 3: ADD Snappy Gifts to the CONTACT or Lead Page Layouts

To add Snappy Gifts to the Contact or Lead Page Layouts:

Go to Setup > Object Manager > Contact > Page Layouts

From here you can:

- Edit the Contact layouts assigned to relevant users
- Click on “Related Lists”
- Drag “Snappy Gifts” to the Related List section.
- Save the layout



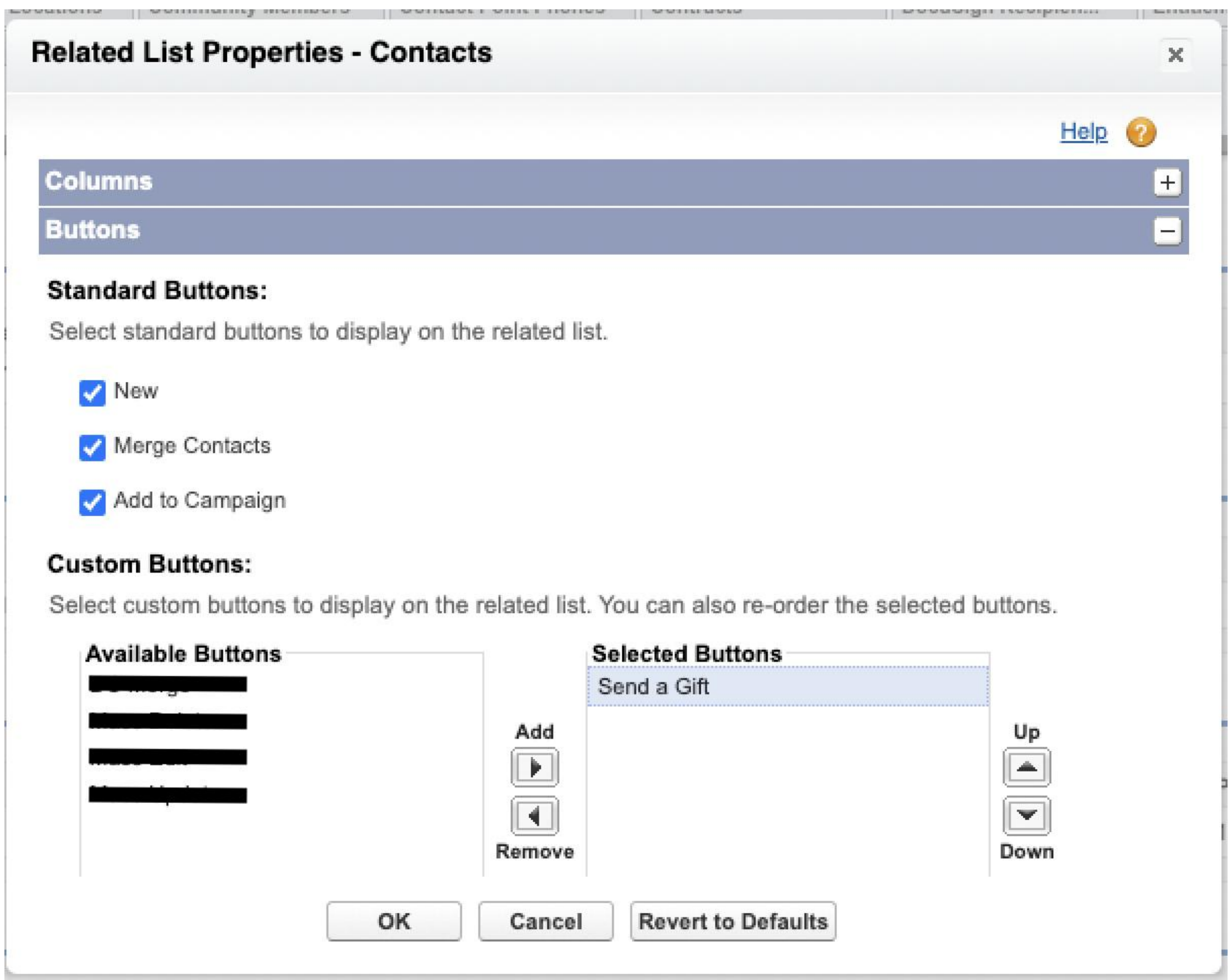



**Image 10: Under the Contacts list view on Account Layout, select custom 'Send a Gift' button**

This process will be the same for Leads.

## SECTION 4: List View Button (Lead & Contact)

To add the **Send a Gift** list button to the Lead and Contact List Views

Go to either :
Setup > Object Manager > Lead > List View Button Layout or
Setup > Object Manager > Contact > List View Button Layout

From here:

- Click Edit
- Select the Send a Gift button under Custom Buttons > Available Buttons and move it to the Selected Buttons by clicking on the right arrow button
- Click Save


**Image 11: Under List View Buttons, select Edit from the drop-down**


**Image 12: Move 'Send a Gift' from available to selected and save**

## Section 5: Install and configure Auth. Provider unlocked package

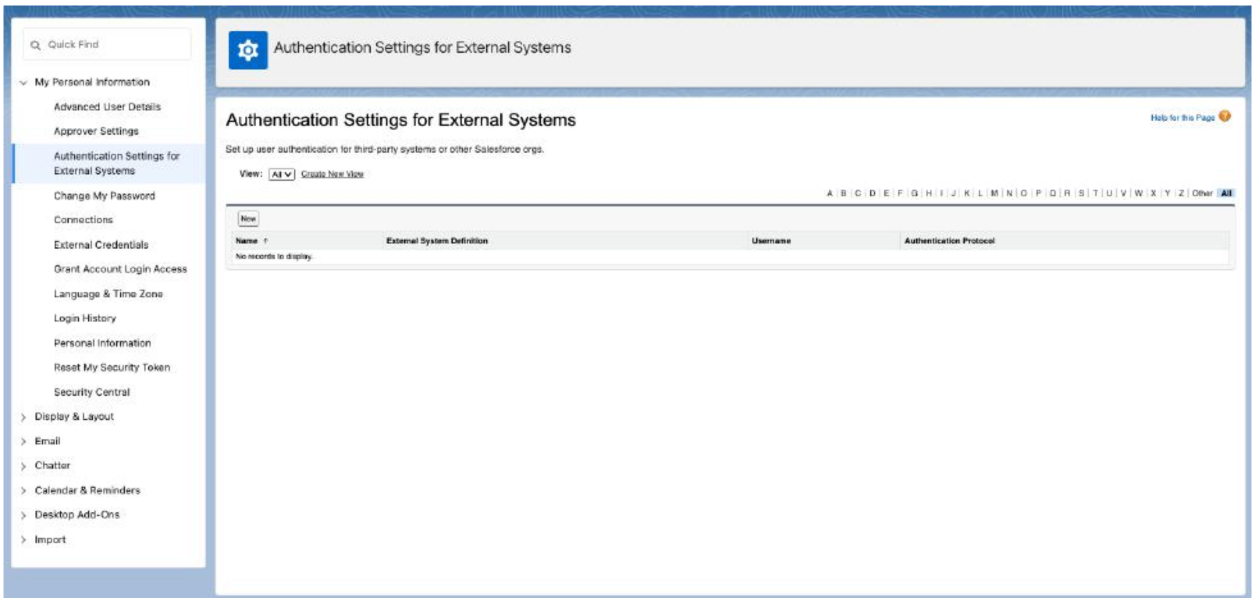
To create a “Snappy API Access” permission set and assign it to the users that require access to the Snappy Application.

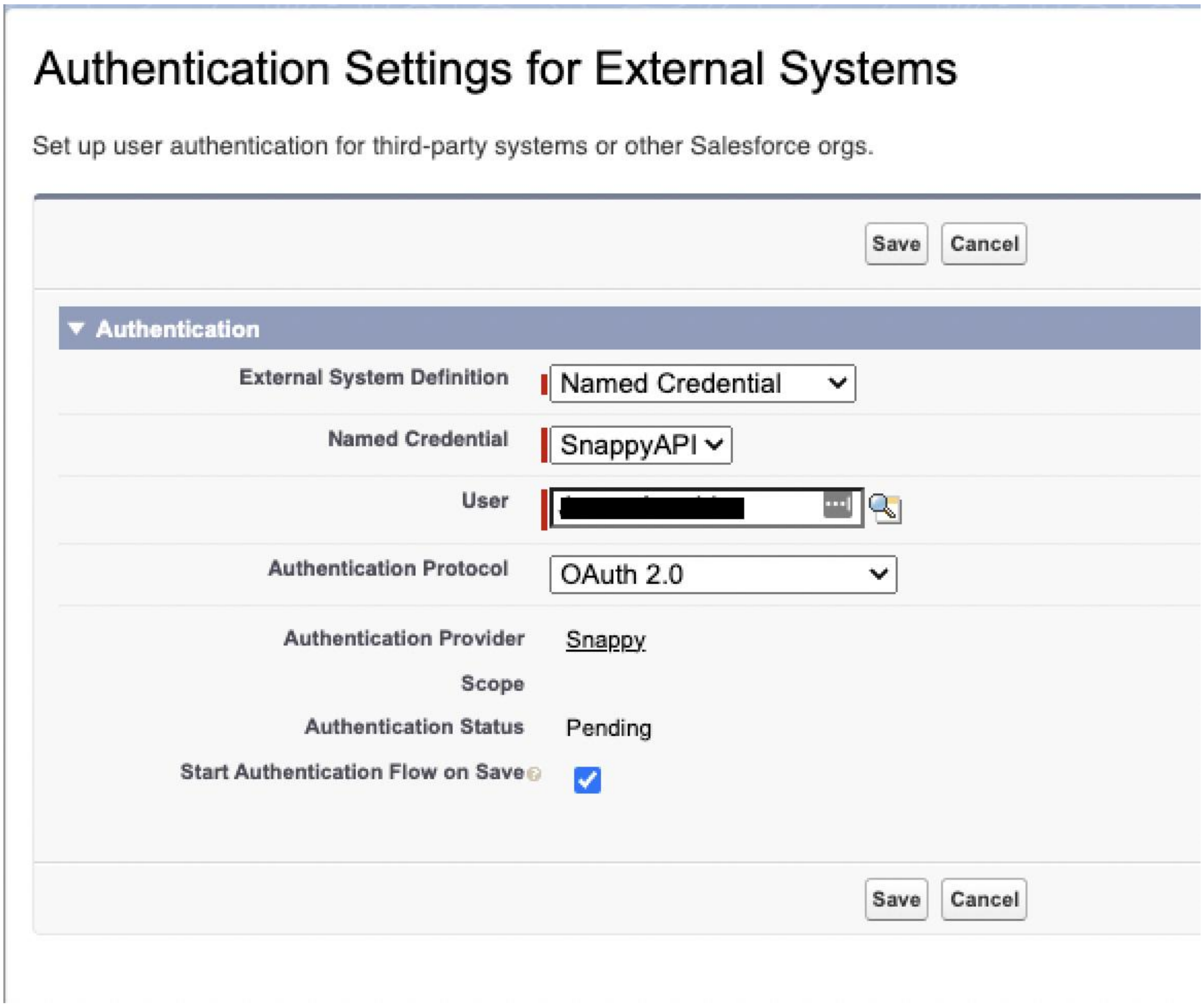
- Setup > Permission Sets > New > Name: “Snappy API Access” > Named Credential Access > Edit & select Snappy API > Save

Next, go to Manage Assignments > add all the users that need access to send gifts.

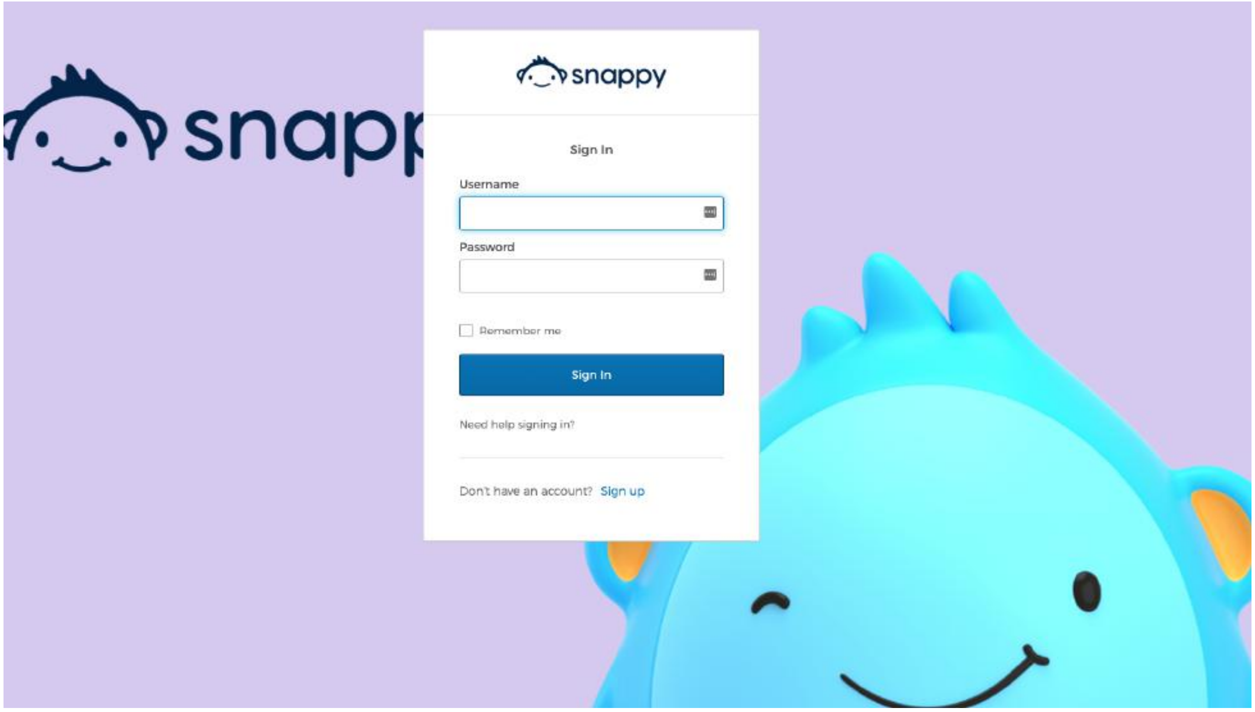
To Authorize the user:

User > Settings > Authentication Settings for External Systems > New > User (lookup your own User) & check the “Start Authentication Flow on Save” box > Save



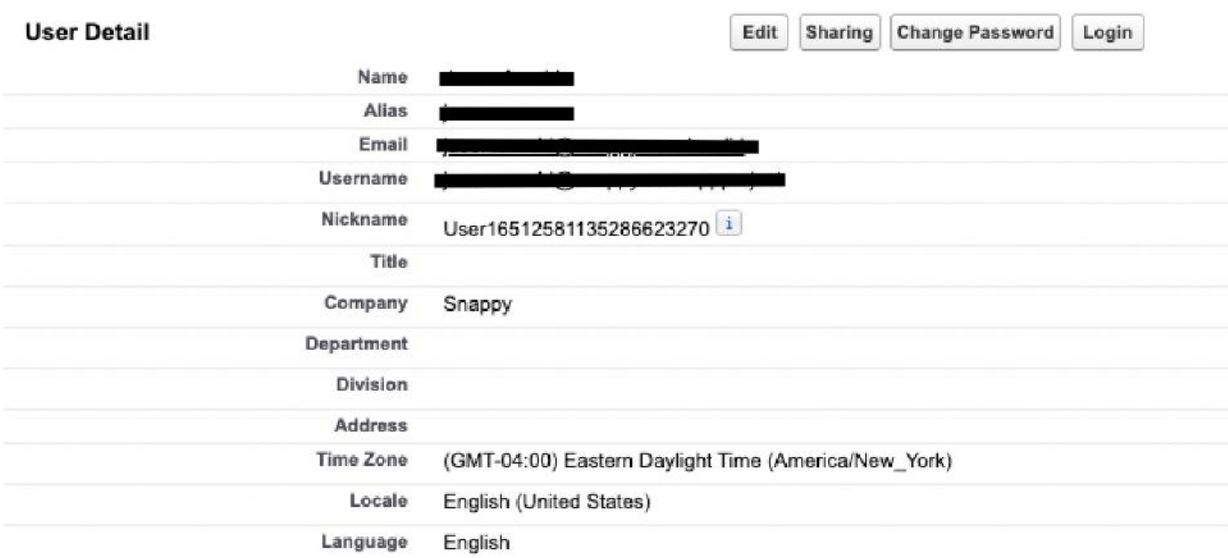



Finally. Enter your snappy credentials and sign in.




## Section 6: Enter Company Name on User Record

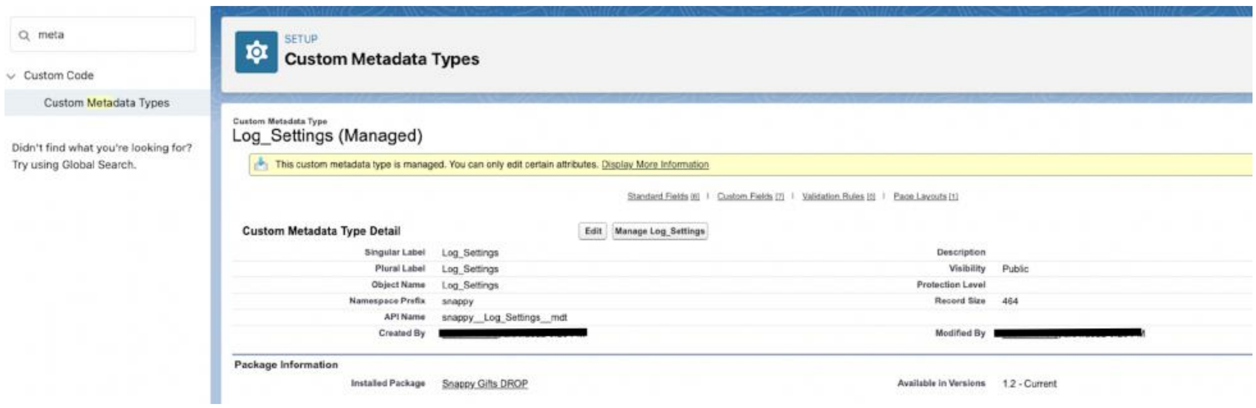
Check if the user record has the Company name populated. If it is empty, it needs to be updated so that value would be populated correctly in the email component.



# Section 7: Metadata Logging

To find and configure your logging Mechanisms go to;

Setup > Type ‘Custom Metadata’ in Quick Find > Custom Metadata Types > Log Settings > Manage Log Settings > New




Finally, enter and configure your data as below.

Note: the max number of logs can change.