

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**.

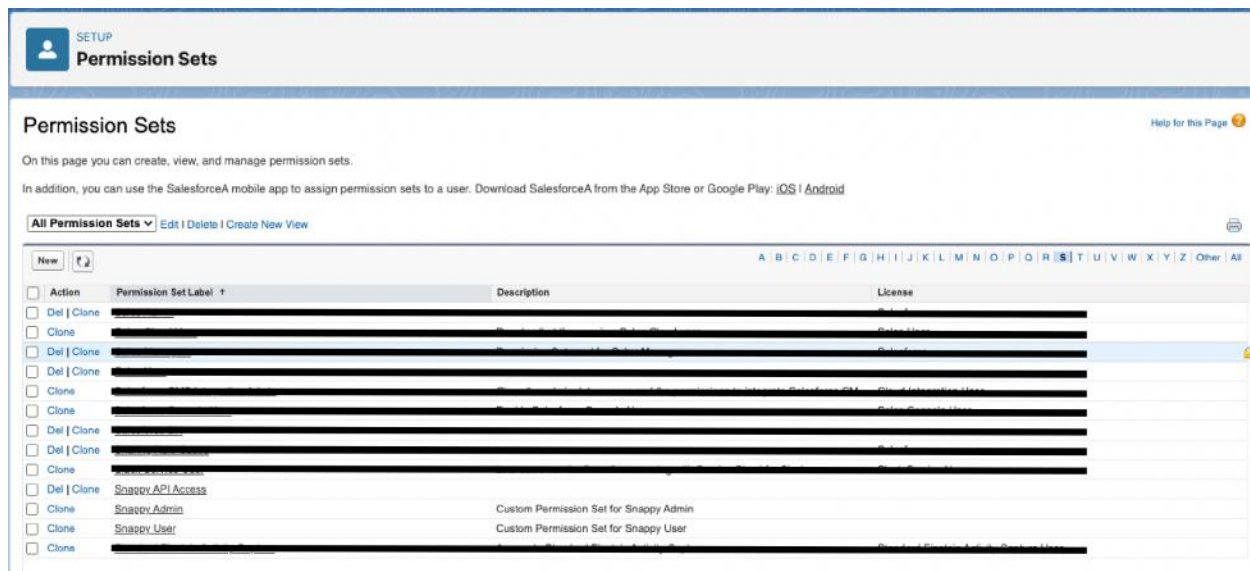


Image 1: Locate Snappy Permission Sets

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

- Click on snappy user
- Click the **“Manage Assignments”** button.

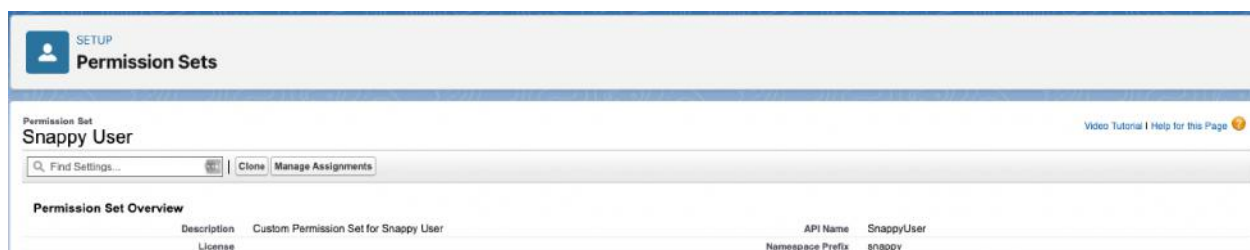


Image 2: Desired Permission Sets

Next, select the **“Add Assignment”** button

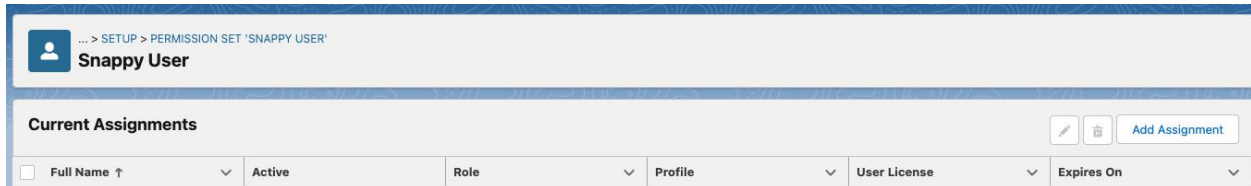


Image 3: 'Add Assignments'

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

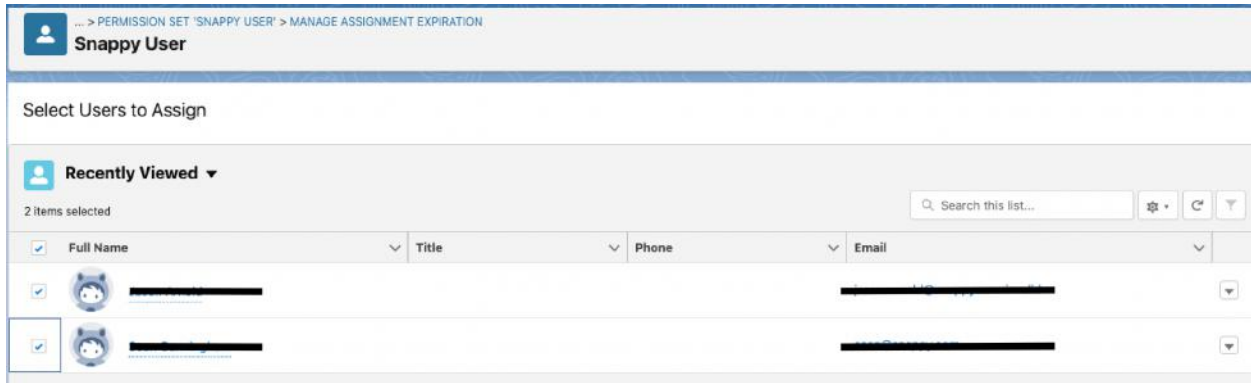


Image 4: Locate and Select Users

Set any expiration dates that should apply to the user.

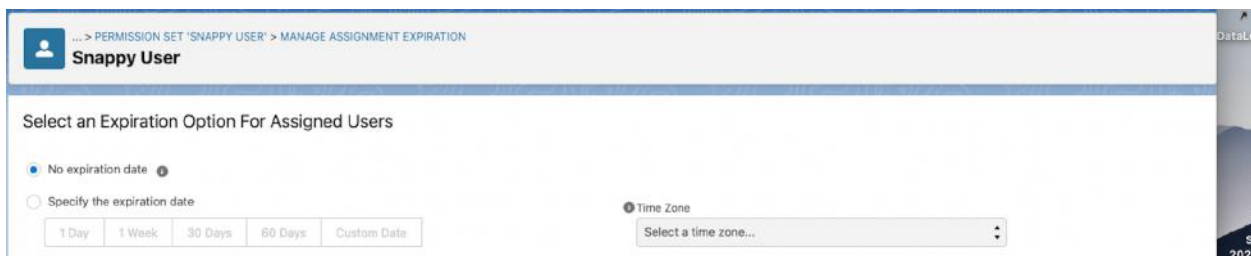


Image 5: Select Expiration Settings

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

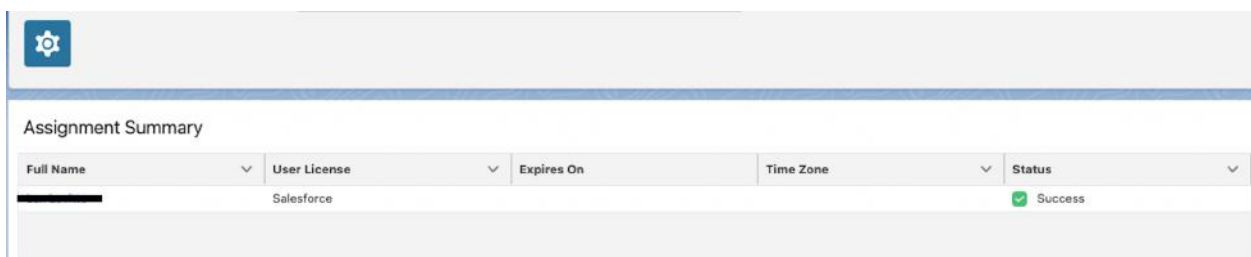


Image 6b: Success Screen

Note:

- User permission sets should be applied to users who need to *send gifts*.
- Admin permissions should be 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

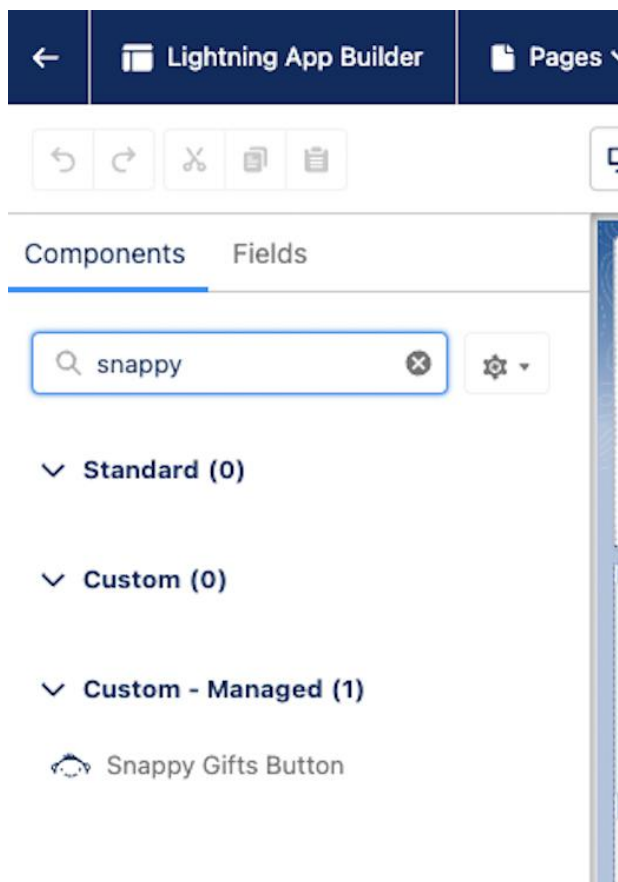


Image 7: Lightning Record

Save the changes and activate as required.

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

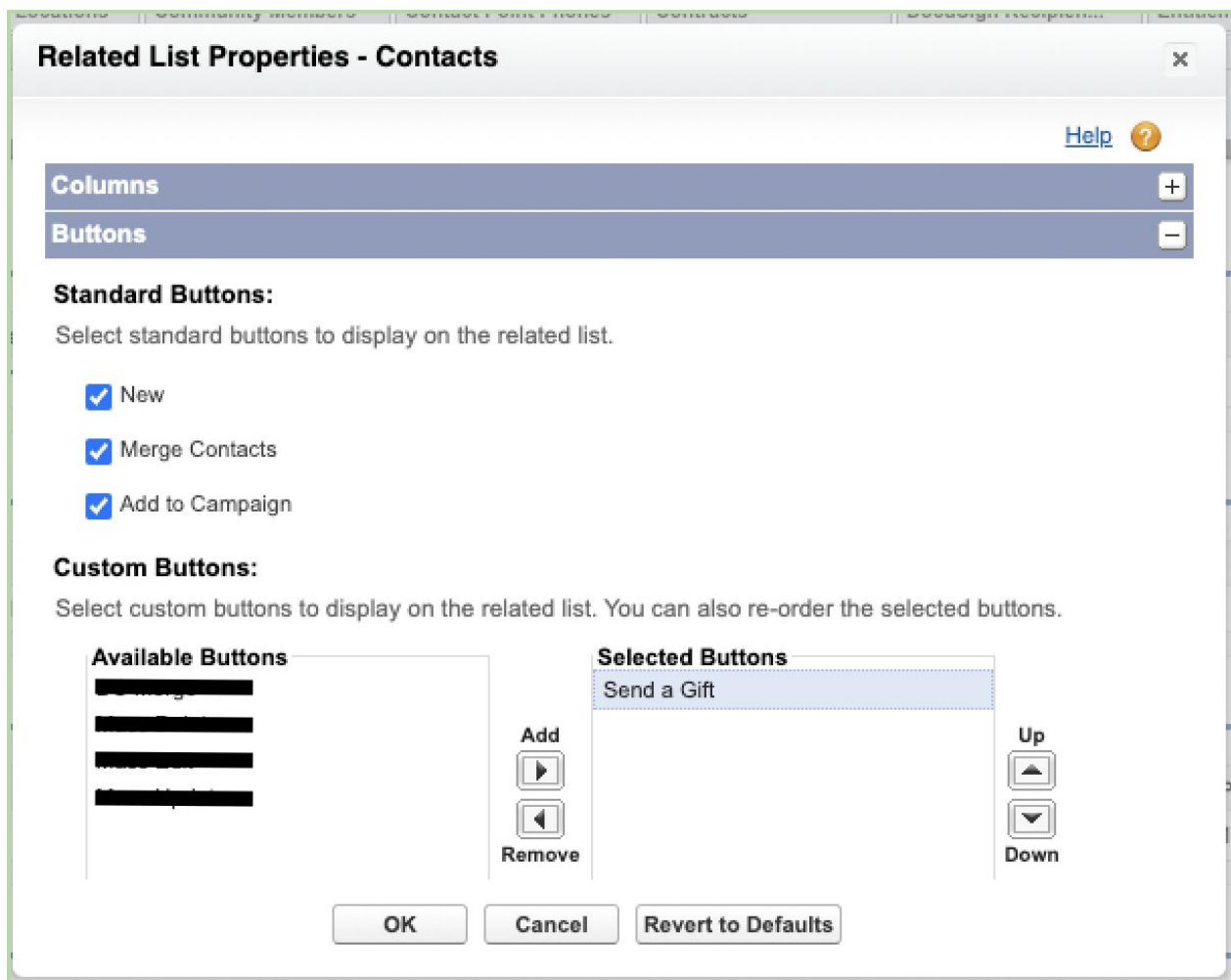
SECTION 3: ADD Snappy Gifts to the CONTACT or Lead Page Layouts

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



Related List Properties - Contacts

Help ?

Columns +

Buttons -

Standard Buttons:

Select standard buttons to display on the related list.

- ☒ New
- ☒ Merge Contacts
- ☒ Add to Campaign

Custom Buttons:

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

Available Buttons

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

Selected Buttons

- Send a Gift

Add Remove Up Down

OK Cancel Revert to Defaults

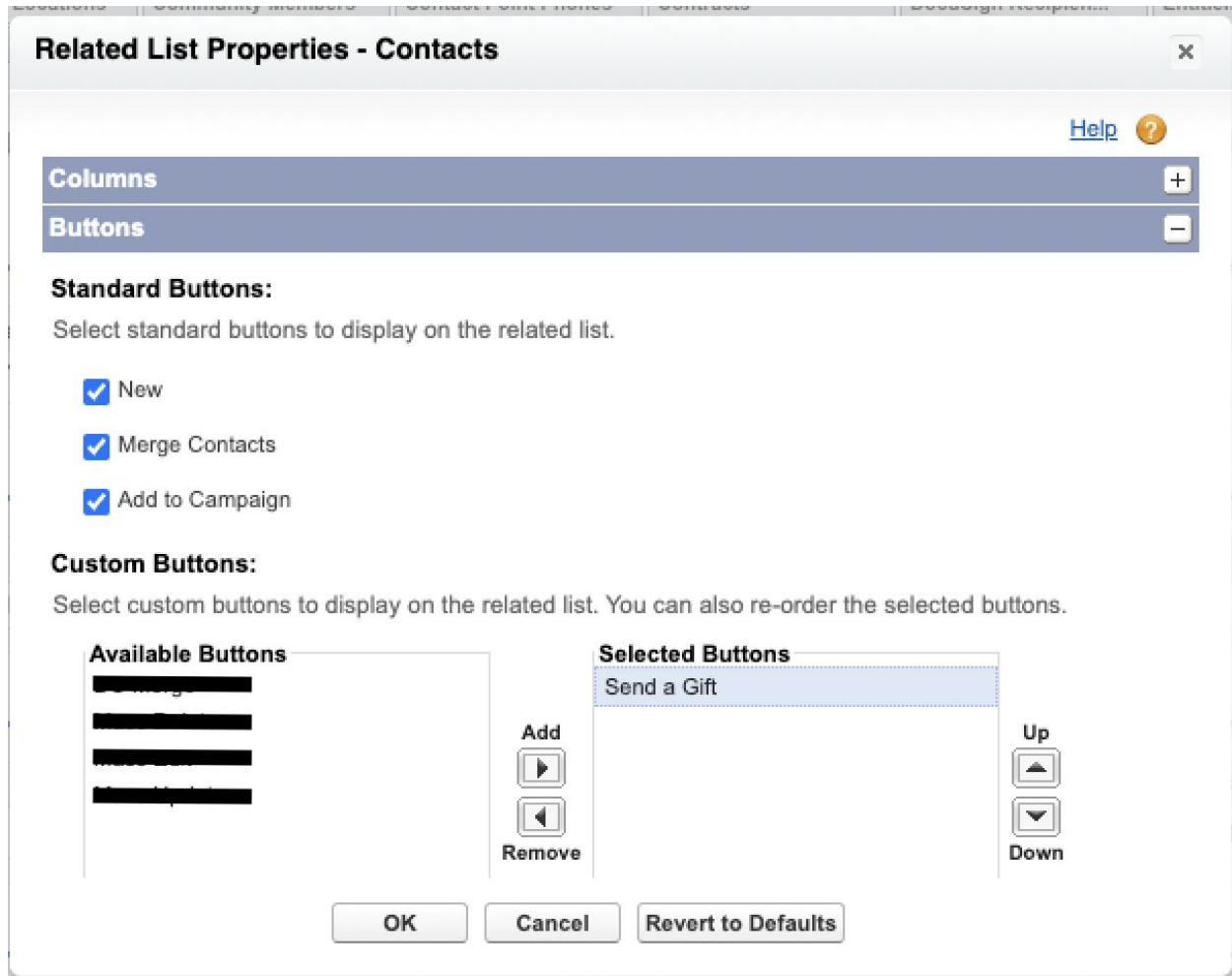


Image 10: Under the Contacts list view on Account Layout, select custom 'Send a Gift' button

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

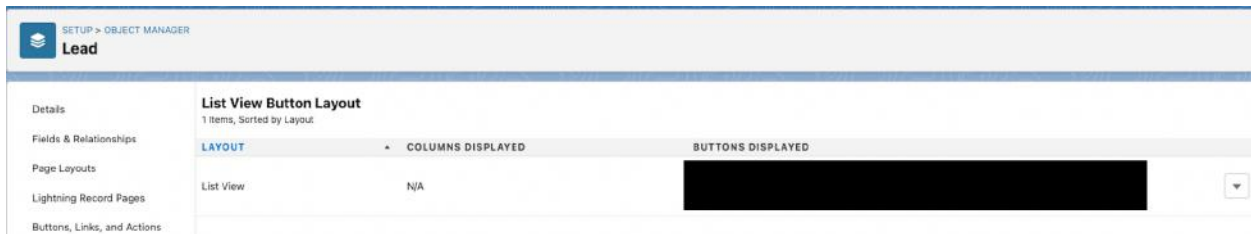


Image 11: Under List View Buttons, select Edit from the drop-down



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

Section 5: Install and configure Auth. Provider unlocked package

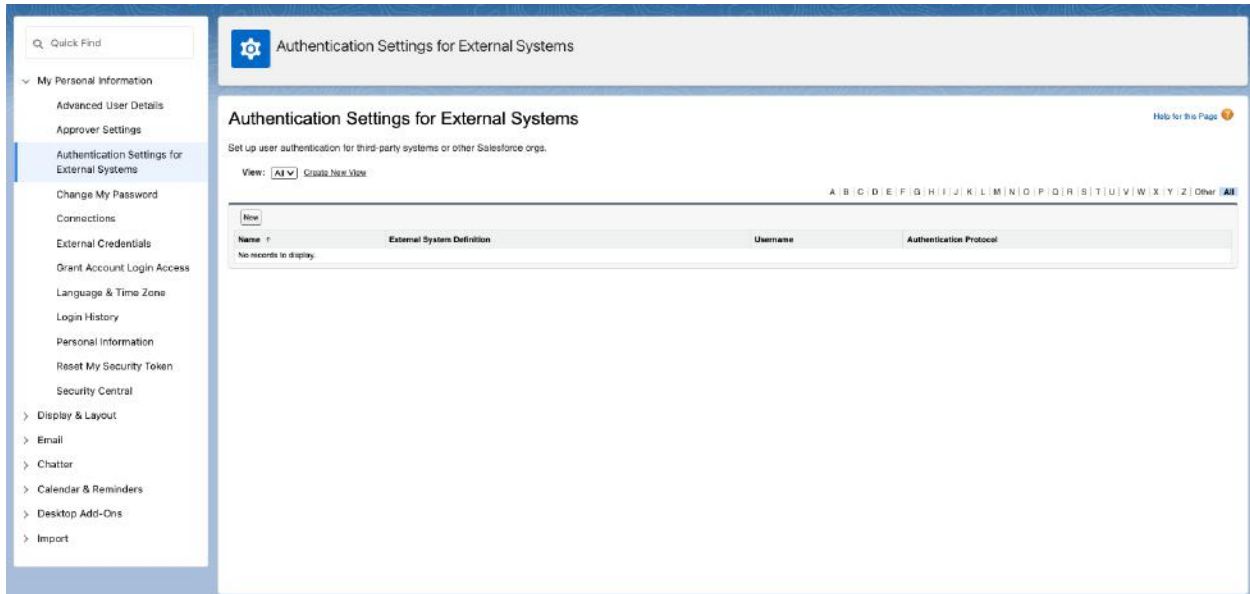
To create a “Snappy API Access” permission set and assign it to the users that require access to the Snappy Application.

- 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



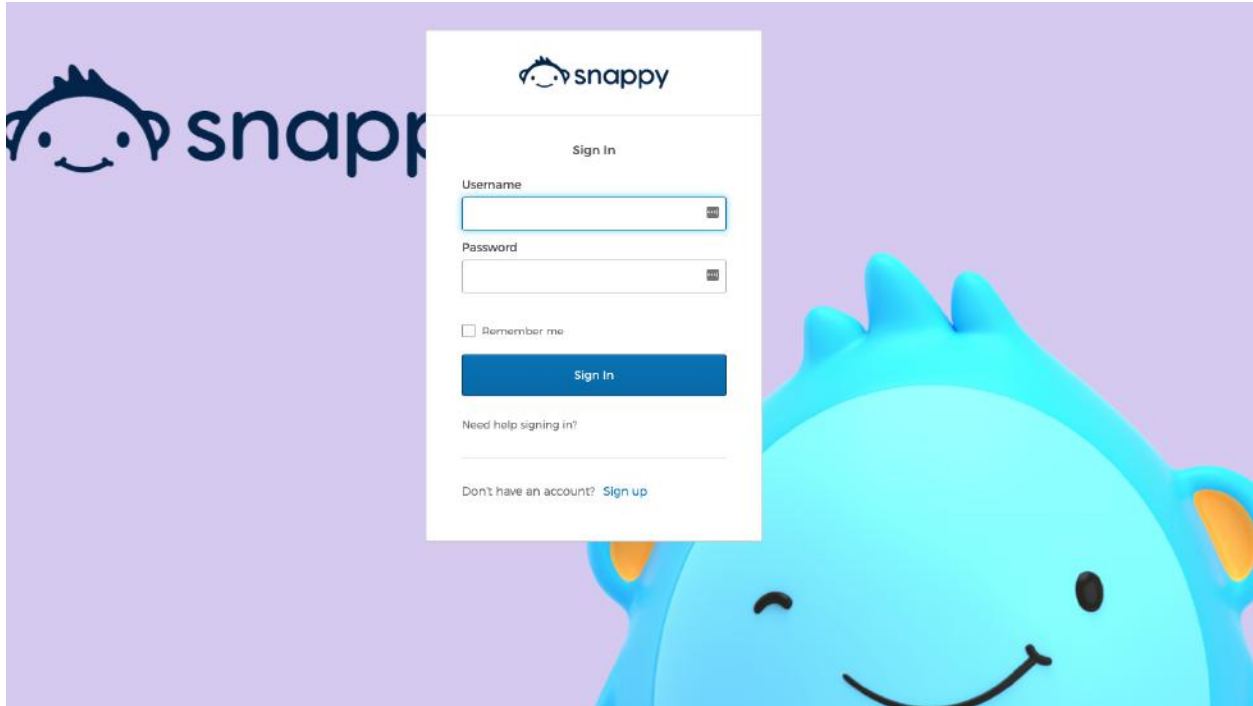
Authentication Settings for External Systems

Set up user authentication for third-party systems or other Salesforce orgs.

▼ Authentication

External System Definition	Named Credential ▼
Named Credential	SnappyAPI ▼
User	[REDACTED] ... Search
Authentication Protocol	OAuth 2.0 ▼
Authentication Provider	<u>Snappy</u>
Scope	
Authentication Status	Pending
Start Authentication Flow on Save	☒

Finally. Enter your snappy credentials and sign in.



Section 6: Enter Company Name on User Record

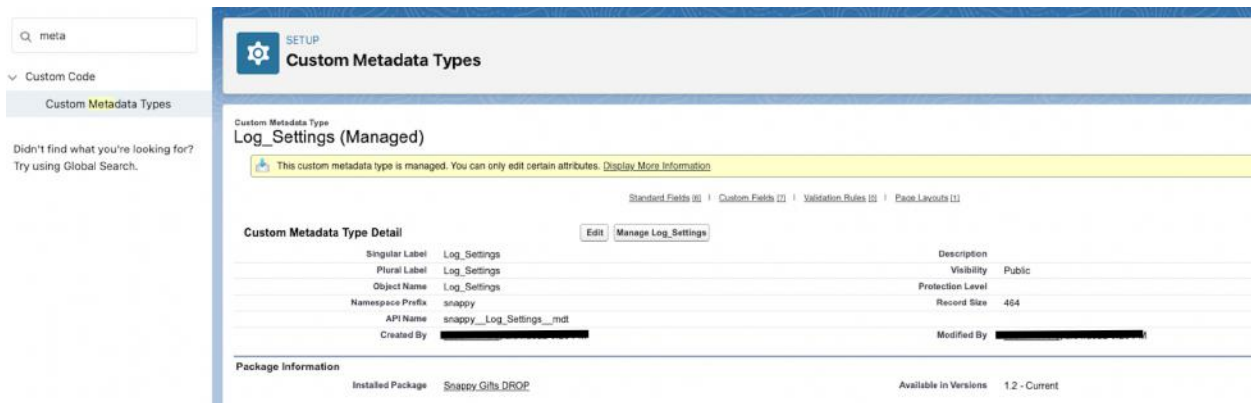
Check if the user record has the Company name populated. If it is empty, it needs to be updated so that value would be populated correctly in the email component.

User Detail		Edit	Sharing	Change Password	Login
Name	[REDACTED]				
Alias	[REDACTED]				
Email	[REDACTED]				
Username	[REDACTED]				
Nickname	User16512581135286623270 ⓘ				
Title					
Company	Snappy				
Department					
Division					
Address					
Time Zone	(GMT-04:00) Eastern Daylight Time (America/New_York)				
Locale	English (United States)				
Language	English				

Section 7: Metadata Logging

To find and configure your logging Mechanisms go to;

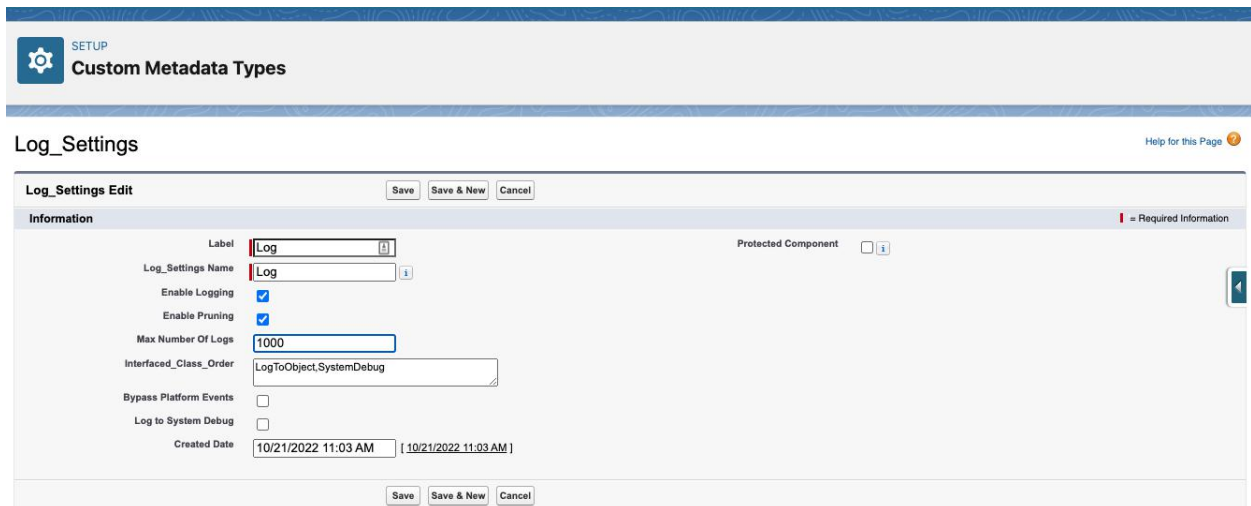
Setup > Type 'Custom Metadata' in Quick Find > Custom Metadata Types > Log Settings > Manage Log Settings > New



The screenshot shows the Salesforce Setup page for Custom Metadata Types. The left sidebar has a search bar with 'meta' and a list of navigation items including 'Custom Code' and 'Custom Metadata Types'. The main content area is titled 'Custom Metadata Types' and shows the 'Log_Settings (Managed)' detail view. A yellow banner states: 'This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)'. Below this, there are tabs for 'Standard Fields', 'Custom Fields', 'Validation Rules', and 'Page Layouts'. The 'Custom Metadata Type Detail' section includes fields for Singular Label, Plural Label, Object Name, Namespace Prefix, API Name, and Created By. The 'Package Information' section shows the installed package as 'Snappy Gifts DROP' and the available versions as '1.2 - Current'.

Finally, enter and configure your data as below.

Note: the max number of logs can change.



The screenshot shows the 'Log_Settings Edit' form in Salesforce. The form has a header with 'Log_Settings' and a 'Help for this Page' link. Below the header, there are buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into sections: 'Information' and 'Protected Component'. The 'Information' section includes fields for 'Label' (Log), 'Log_Settings Name' (Log), 'Enable Logging' (checked), 'Enable Pruning' (checked), 'Max Number Of Logs' (1000), 'Interfaced_Class_Order' (LogToObjectSystemDebug), 'Bypass Platform Events' (unchecked), 'Log to System Debug' (unchecked), and 'Created Date' (10/21/2022 11:03 AM). The 'Protected Component' section has a checkbox for 'Protected Component' (unchecked). At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.