

Addressx – Managed Package for Salesforce

INSTALLING ADDRESSX

Addressx has worked hard to insure that this installation is simple and quick. Most customers are able to install Addressx in less than an hour. OK – let’s get started!!

STEP 1 – INSTALL ADDRESSX

Addressx installs using the standard Salesforce managed packaged installer. Begin the installation process and follow the installation wizard. Click the “Continue” box highlighted in red.

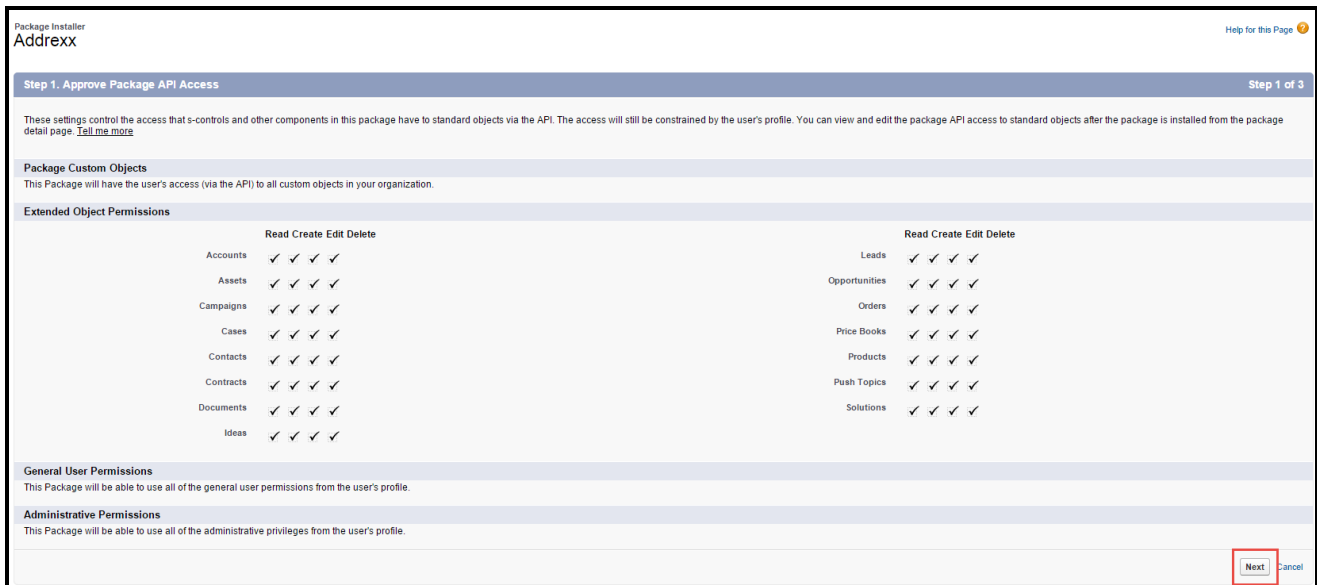


The screenshot shows the 'Package Installation Details' screen. It contains a table with the following information:

Package Name	Addressx
Version Name	Addressx 2015
Version Number	1.21
Publisher	Addressx
Description	Addressx - Release 2015

In the bottom right corner, there are two buttons: 'Continue' (highlighted with a red box) and 'Cancel'.

Click the next box in the bottom right. It is highlighted in red below.

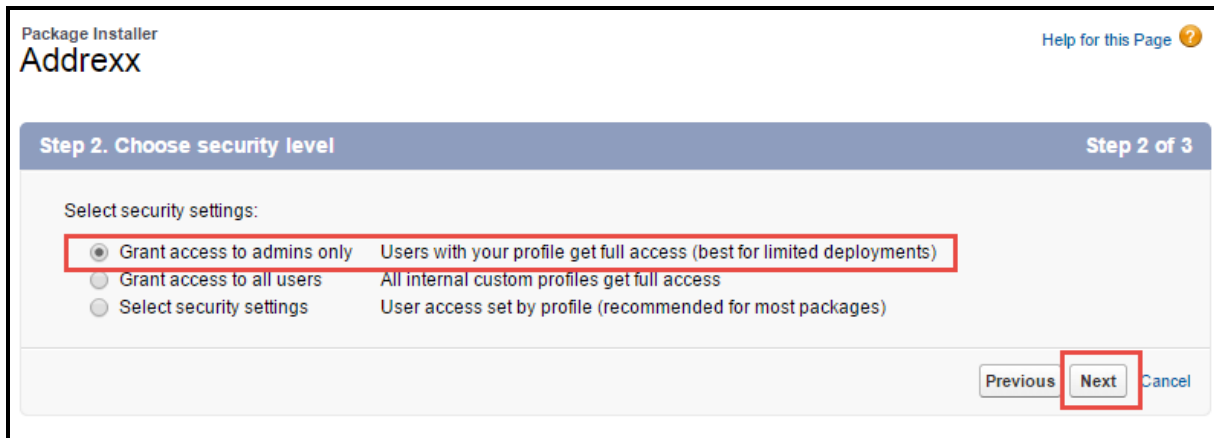


The screenshot shows the 'Package Installer' screen for 'Addressx', specifically 'Step 1. Approve Package API Access'. The page includes a 'Help for this Page' link in the top right. Below the header, there is a section for 'Package Custom Objects' and 'Extended Object Permissions'. The permissions are listed in two columns, each with a header 'Read Create Edit Delete' and a row of four checkmarks for each object.

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Orders	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Push Topics	✓	✓	✓	✓
Documents	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Ideas	✓	✓	✓	✓					

Below the permissions table, there are sections for 'General User Permissions' and 'Administrative Permissions', both stating that the package will use all permissions from the user's profile. In the bottom right corner, there are 'Next' and 'Cancel' buttons, with 'Next' highlighted by a red box.

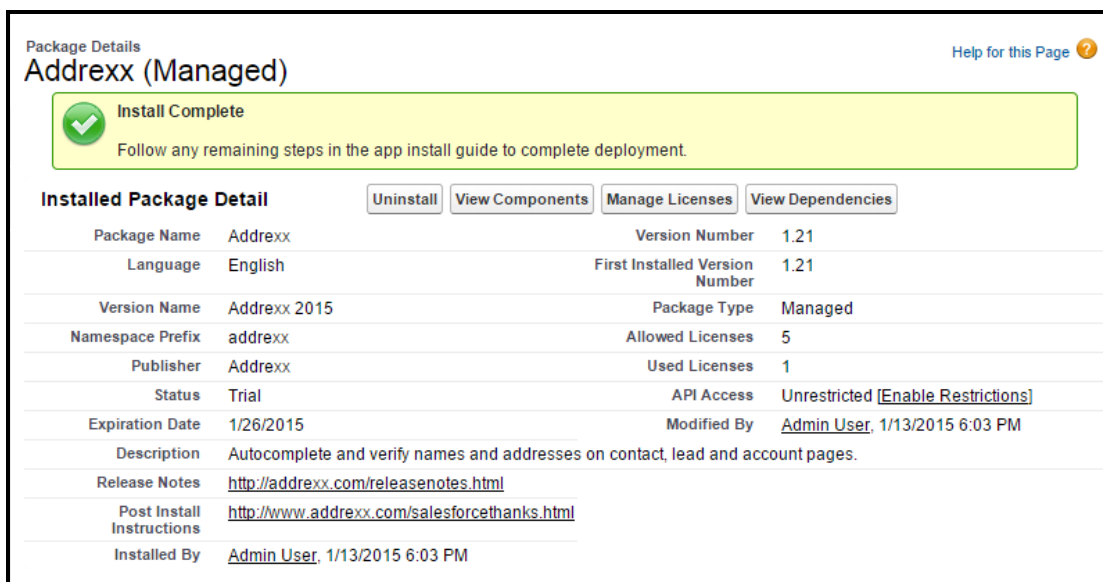
Select "Grant access to admins only" and click "Next". Please see screenshot below.



Click "Install". It is highlighted in the screenshot provided.



After Addressx is successfully installed you will see an installation summary window. The installation summary will look like the example provided below.



Addressx is now installed!

Next, we will customize the install for Standard Users.

Under Administration Setup, select Manage User | Profiles

Select the "Edit" button next to "Standard Users"

The screenshot shows the Salesforce Administration Setup interface for Profiles. The left sidebar contains navigation options like 'Salesforce1 Setup', 'Force.com Home', and 'Administer'. The main content area shows a list of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Standard User' profile is selected, and its 'Edit' button is highlighted with a red box.

Action	Profile Name	User License	Custom
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Clone	Read Only	Salesforce	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

SET CUSTOM TAB SETTINGS

Locate the "Custom Tab Settings". Please change the values of all three tabs from "Tab Hidden" to "Default On"

The screenshot shows the 'Custom Tab Settings' section in Salesforce. Three dropdown menus are visible, each set to 'Tab Hidden'. The dropdowns are for 'Account - Addressx', 'Lead - Addressx', and 'Contact - Addressx'. A red box highlights these three dropdowns.

SET FIELD LEVEL SECURITY FOR ACCOUNT

Continue working under the "Profiles" section – Locate the "Field-Level" Security section

Click the "View" link to the right of Account

The screenshot shows the 'Field-Level Security' section in Salesforce. A list of fields is displayed, including 'Account', 'Asset', 'Campaign', 'Campaign Member', 'Case', 'Contact', 'Contract', 'Event', 'Idea', 'Lead', and 'Opportunity'. Each field has a '[View]' link to its right. The 'Account' field and its '[View]' link are highlighted with a red box.

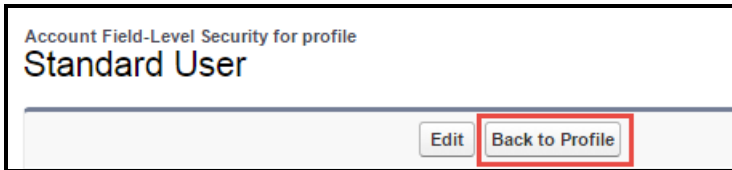
Click Edit

The screenshot shows the 'Account Field-Level Security for profile Standard User' page. At the bottom of the page, there are two buttons: 'Edit' and 'Back to Profile'. The 'Edit' button is highlighted with a red box.

Make sure the following fields are selected:

- Billing Address (Line 1)
- Billing Address (Line 2)
- Shipping Address (Line 1)
- Shipping Address (Line 2)

Select back to profile

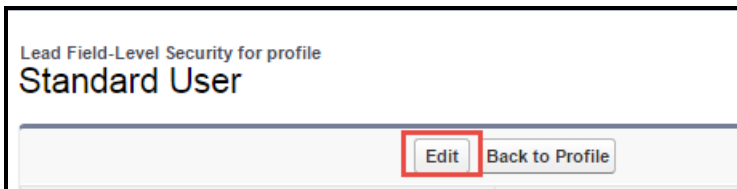


SET FIELD LEVEL SECURITY FOR LEAD

Click the "View" link to the right of Lead

Field-Level Security	
Account	[View]
Asset	[View]
Campaign	[View]
Campaign Member	[View]
Case	[View]
Contact	[View]
Contract	[View]
Event	[View]
Idea	[View]
Lead	[View]
Opportunity	[View]
Opportunity Product	[View]
Order	[View]
Order Product	[View]
Price Book	[View]
Price Book Entry	[View]
Product	[View]
Social Persona	[View]
Solution	[View]
Task	[View]
User	[View]

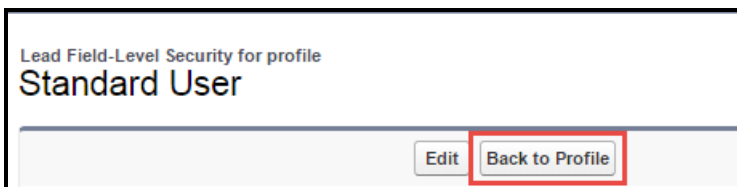
Click Edit



Make sure the following fields are selected:

- Address1
- Address2

Select back to profile



SET FIELD LEVEL SECURITY FOR CONTACT

Click the "View" link to the right of Contact

Field-Level Security	
Account	[View]
Asset	[View]
Campaign	[View]
Campaign Member	[View]
Case	[View]
Contact	[View]
Contract	[View]
Event	[View]
Idea	[View]
Lead	[View]
Opportunity	[View]
Opportunity Product	[View]
Order	[View]
Order Product	[View]
Price Book	[View]
Price Book Entry	[View]
Product	[View]
Social Persona	[View]
Solution	[View]
Task	[View]
User	[View]

Click Edit

Contact Field-Level Security for profile
Standard User

Make sure the following fields are selected:

- Mailing Street (Line 1)
- Mailing Street (Line 2)
- Other Street (Line 1)
- Other Street (Line 2)

Select back to profile

Contact Field-Level Security for profile
Standard User

ENABLE VISUALFORCE PAGE ACCESS

Scroll down in the profiles section and locate the “Enabled Visualforce Page Access” section. Edit the available page so the result matches the screenshot provided below.

Visualforce Page Name	AppExchange Package Name
addrexx.account	Addrexx
addrexx.accountExpress	Addrexx
addrexx.contact	Addrexx
addrexx.contactExpress	Addrexx
addrexx.lead	Addrexx
addrexx.leadExpress	Addrexx
addrexx.mobileCreateAccount	Addrexx
addrexx.mobileCreateContact	Addrexx
addrexx.mobileCreateLead	Addrexx

SET HOME PAGE LAYOUT

Under “App Setup” – Select Customize | Home | Home Page Layouts

Select the checkbox to the right of “Addrexx”

Edit Home Layout

Help for this Page ?

Step 1. Select the components to show Step 1 of 2

Choose the components to include on your home page layout.

Layout Name:

Select Wide Components to Show ! = Required Information

Items to Approve	<input type="checkbox"/>	Calendar	<input checked="" type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>	Dashboard Snapshot	<input checked="" type="checkbox"/>

Select Narrow Components to Show

Create New...	<input checked="" type="checkbox"/>	Recent Items	<input checked="" type="checkbox"/>
Messages & Alerts	<input checked="" type="checkbox"/>	Custom Links	<input checked="" type="checkbox"/>
Tags	<input type="checkbox"/>	Addrexx	<input type="checkbox"/>

Use the arrows to move “Addrexx” to the top of the “Narrows (Left) Column” field

Edit Home Layout

Help for this Page ?

Step 2. Order the components Step 2 of 2

Arrange the components on your home page.

Narrow (Left) Column		Wide (Right) Column	
<input checked="" type="checkbox"/> Addrexx	Top	<input type="checkbox"/> Dashboard Snapshot	Top
<input type="checkbox"/> Create New...	Up	<input type="checkbox"/> Tasks	Up
<input type="checkbox"/> Recent Items	Down	<input type="checkbox"/> Calendar	Down
<input type="checkbox"/> Custom Links	Bottom		Bottom
<input type="checkbox"/> Messages & Alerts			

CONFIGURE SALESFORCE 1

Go "Mobile Administration" then "Mobile Navigation"

Move the three Addressx menu items shown below to the "Selected" section

Mobile Navigation Help for this Page

Add Salesforce productivity items, smart search items, Visualforce tabs, or Flexible Page tabs to the Salesforce1 navigation menu.

When organizing the menu items, put the items that users will want most at the top. The first item in the Selected list becomes the Salesforce1 landing page for users. The Smart Search Items element can expand into a set of eight or more menu items in Salesforce1, and it may push other elements below the scroll point if you put it near the top of the menu. Anything you put below the Smart Search Items element will appear in the Apps section of the navigation menu.

The Today menu item is only available for the Salesforce1 downloadable app.

Navigation Menu Items Save Cancel

Available		Selected
Account - Addressx Contact - Addressx Lead - Addressx	Add	Feed People Groups Today Tasks Smart Search Items Approval Requests Dashboards Events

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

Save Cancel

Move the three Addressx items to the top of the "Selected" section.

Mobile Navigation Help for this Page

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Navigation Menu Items Save Cancel

Available		Selected
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Save Cancel