Configuration and User Manual

Getting started with Salesforce

Date: 26 April 2023

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1. PRE-REQUISITE

1.1 Salesforce Account (Sales Cloud)

- Requires a Sales Cloud login with system admin user profile and Sales user profile having access to an Opportunity.

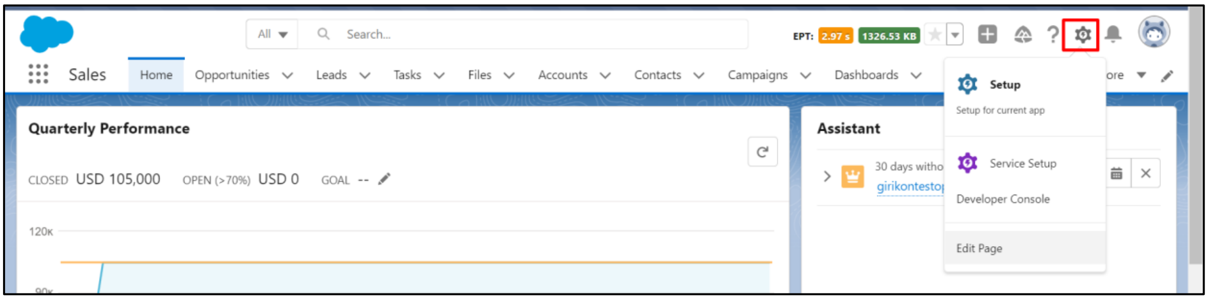
1.2 Xakia Platform

- A system admin with a login to the Xakia platform.

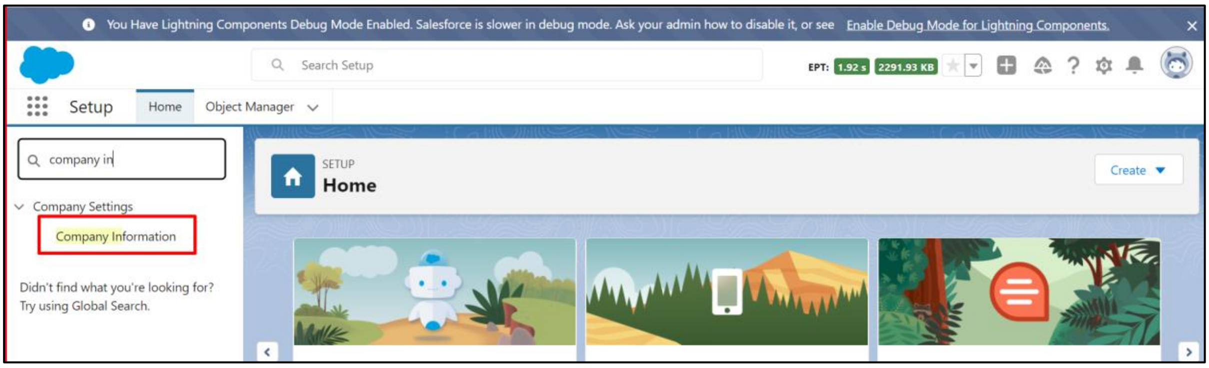
1.3 Enable Multiple-Currencies in Salesforce

Steps to Enable Multiple Currencies

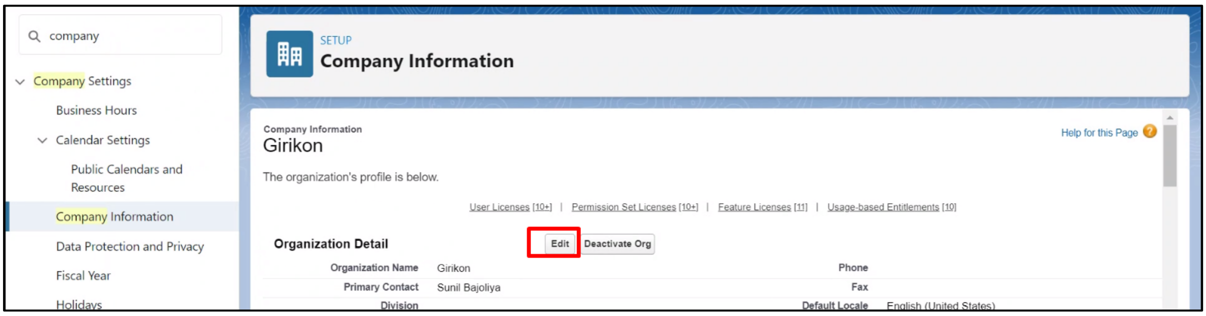
- Click the 'gear' icon in the upper right corner and then click on 'Setup'.



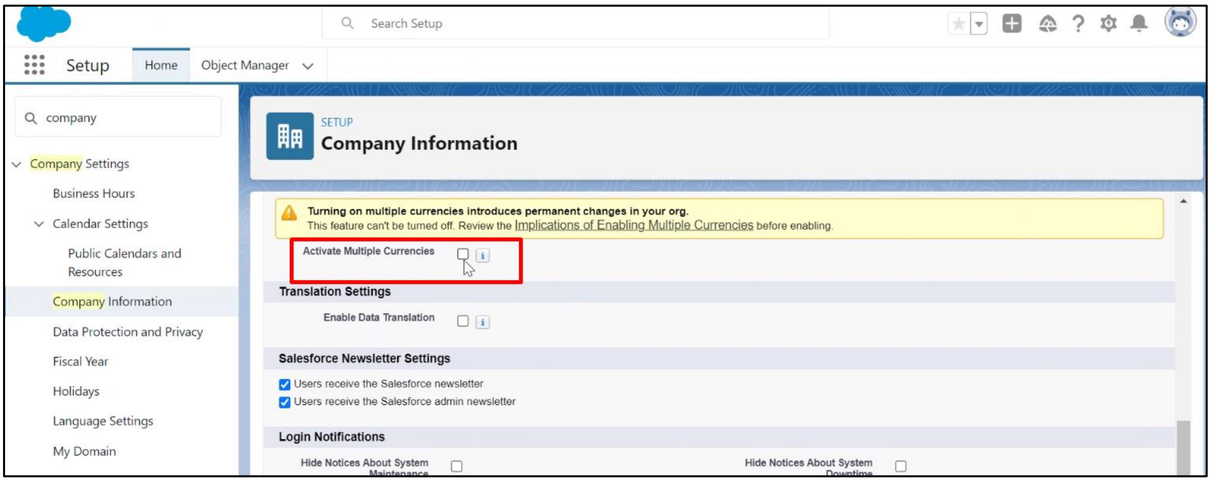
- Search 'Company Information' in the quick find box on the left hand side.



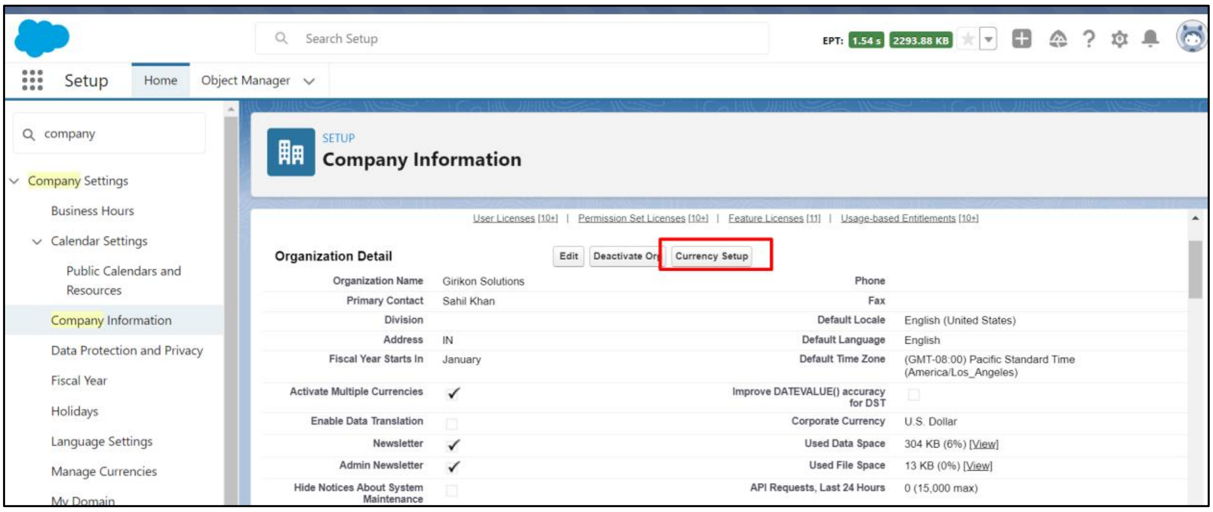
- Once you click on 'Company Information', click on the 'Edit' button.



- Scroll down and click on the checkbox to enable 'Multiple Currencies'.
- Click on the 'Save' button.



- Once saved, the 'Currency Setup' button will be enabled at the top the screen.



2. DOWNLOAD THE PACKAGE

2.1 Download and install the Xakia-Salesforce App

- Download the Xakia Legal Requests for Salesforce App from the [Salesforce AppExchange here](#).
- Download and install the Xakia Legal Requests for Salesforce managed package in the target org by clicking on the 'Get it now' button.

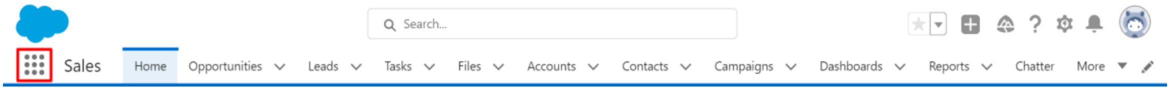
3. POST INSTALLATION STEPS

3.1 Update Xakia Configurations

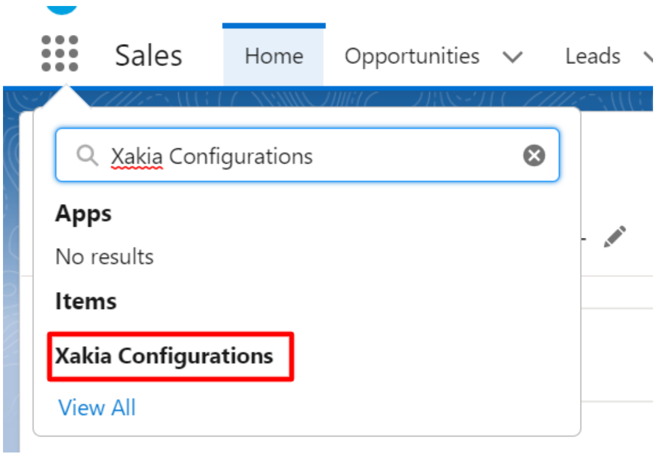
The steps below will help you update Xakia public APIs configuration and authentication related details from Xakia org in 'Xakia Configurations' custom screen in Salesforce.

Steps to Update Xakia Configurations:

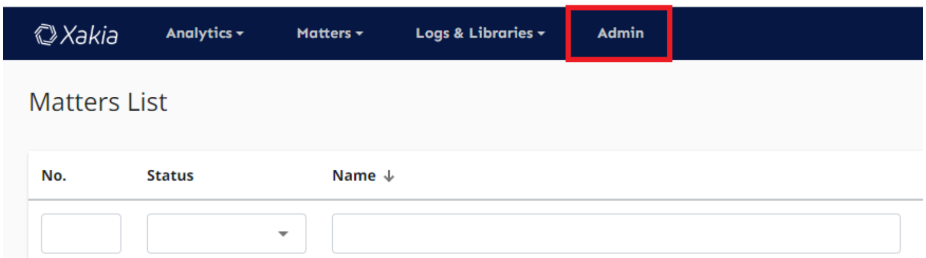
- Login to your Salesforce org and open the App Launcher in the top left-hand corner of your screen.



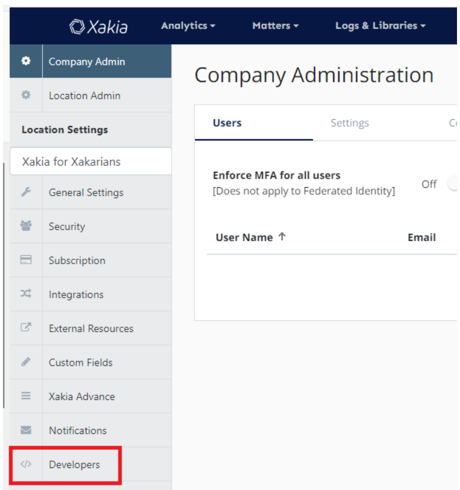
- Start typing 'Xakia Configuration' in the search bar and click on it when it appears in the filter list.



- You will be directed to a custom screen where you have to enter all the details related to the Xakia App location that you want connect to Salesforce.
- To update these field values, user will need to login to Xakia to retrieve the values.
- Once logged into Xakia, click on 'Admin' in the top navigation menu



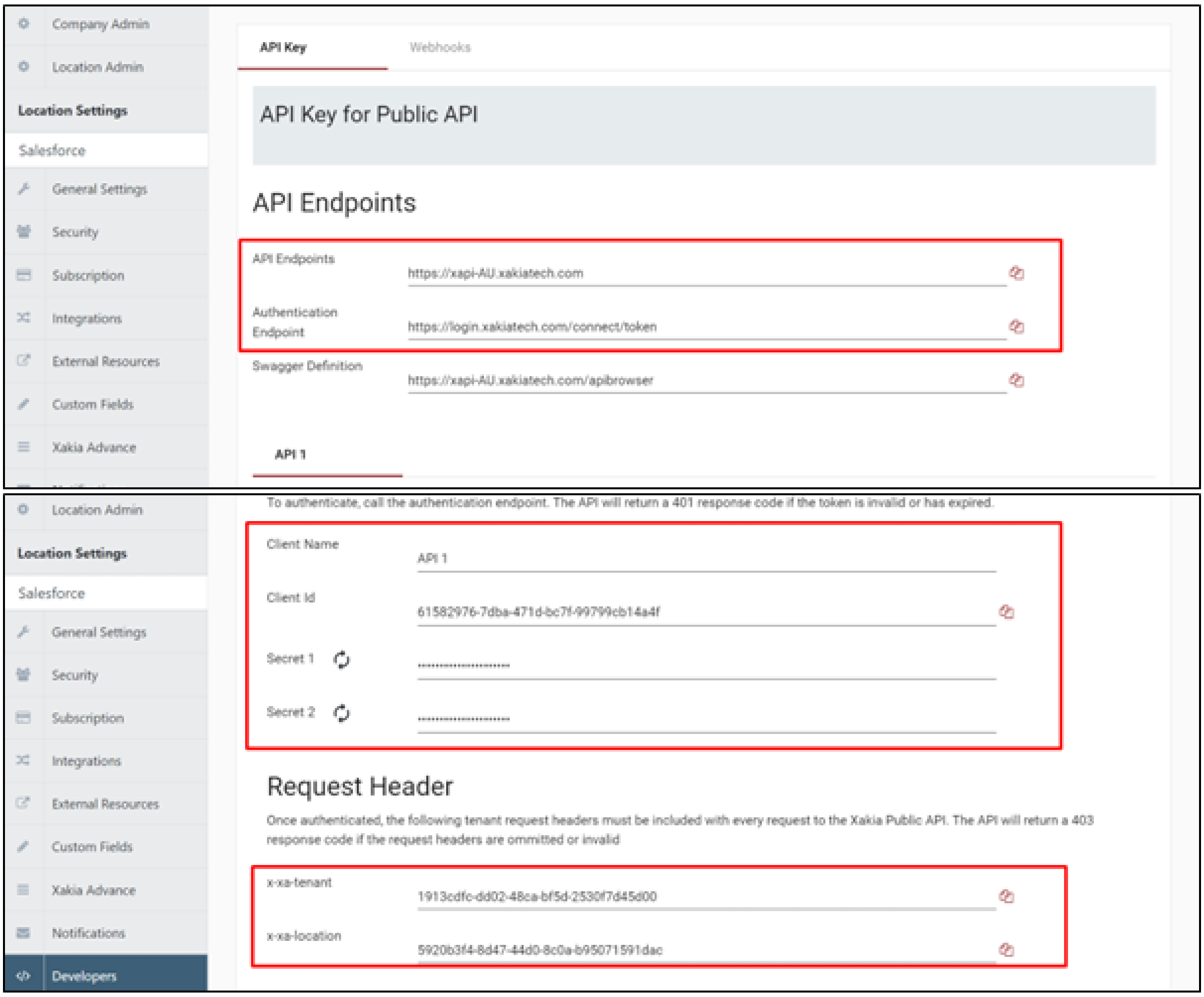
- Click on 'Developers' from the left hand side panel.



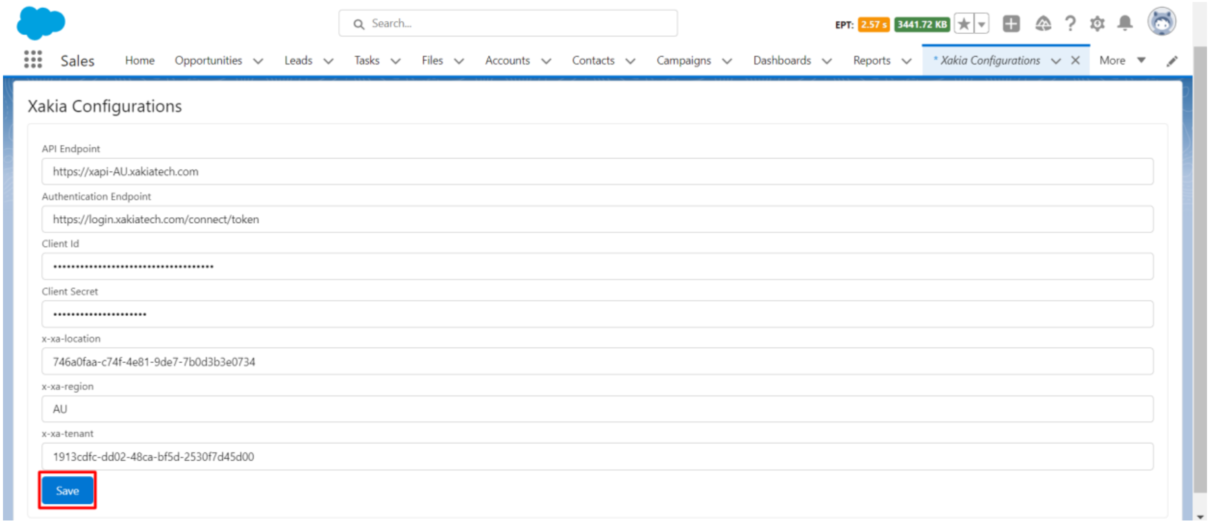
- The page will refresh, where all the required details will display such as:
  - x-xa-tenant
  - x-xa-location
  - x-xa-region
  - Client Id
  - Client Secret
  - API Endpoint
  - Authentication Endpoint

Note:

- Identifier of the region (x-xa-region) must be one of **AU, US, UK, CA or NL**, and the API browser endpoints are region specific. You will need to use xapiau.xakiatech.com for AU locations, xapi-us.xakiatech.com for US locations, etc.
- User can select any client secret either secret 1 or secret 2. If the secret information will be refreshed or changed in Xakia in the future, you will need to update the client secret in Salesforce org as well.



- Copy the required information from Xakia API Key section and paste it to the custom 'Xakia Configurations' screen in Salesforce.
- Once updated, click on the 'Save' button.

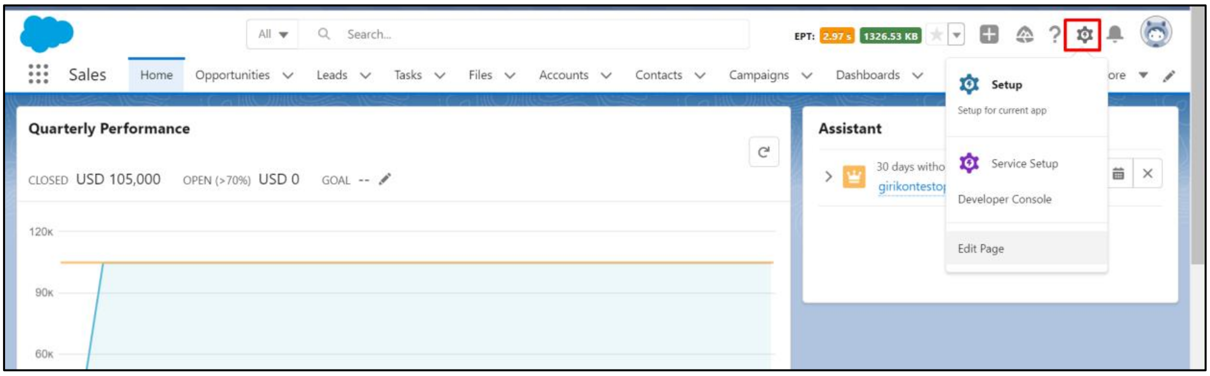


3.2 Schedule Batch for Refresh Token

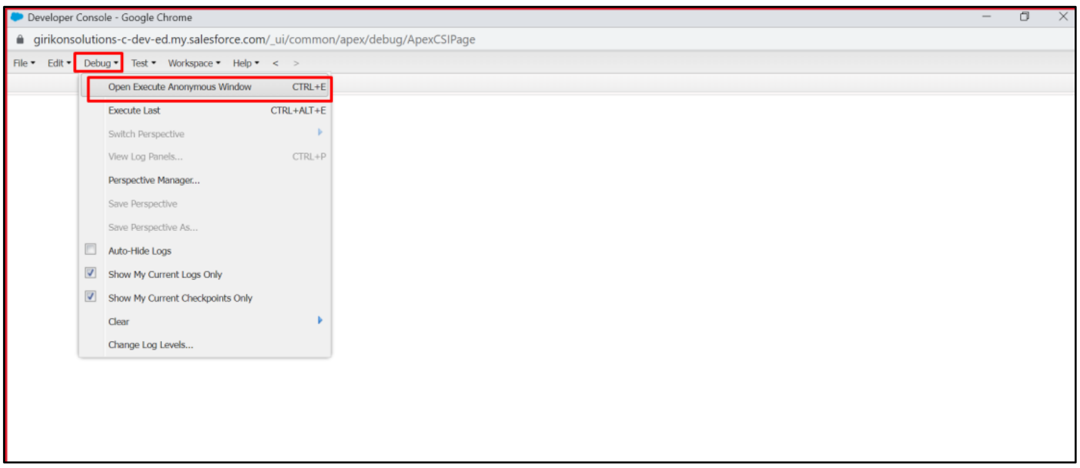
Schedule (RefreshAccessTokenSchedulable) refresh token functionality to run every hour.

Steps to schedule batch job

- Click the 'gear' icon in the upper right corner and then click on 'Developer Console'.



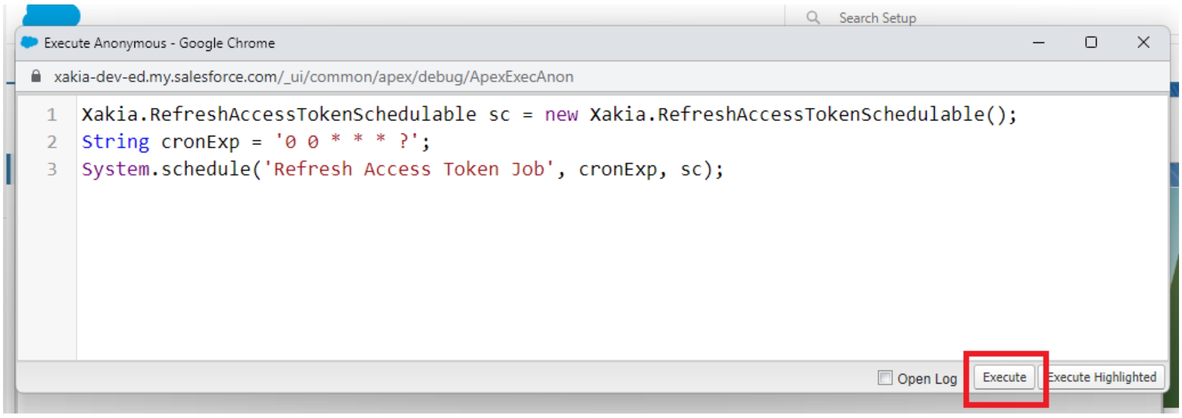
- You will be redirected to the Developer Console window. Click on 'Debug' and then 'Open Execute Anonymous window'.



- An ‘Enter Apex Code’ pop-up window will display. Please copy and paste the code and then click on the ‘Execute’ button to execute Apex Code.

  Reference Code:

```
Xakia.RefreshAccessTokenSchedulable sc = new Xakia.RefreshAccessTokenSchedulable();
String cronExp = '0 0 * * * ?';
System.schedule('Refresh Access Token Job', cronExp, sc);
```

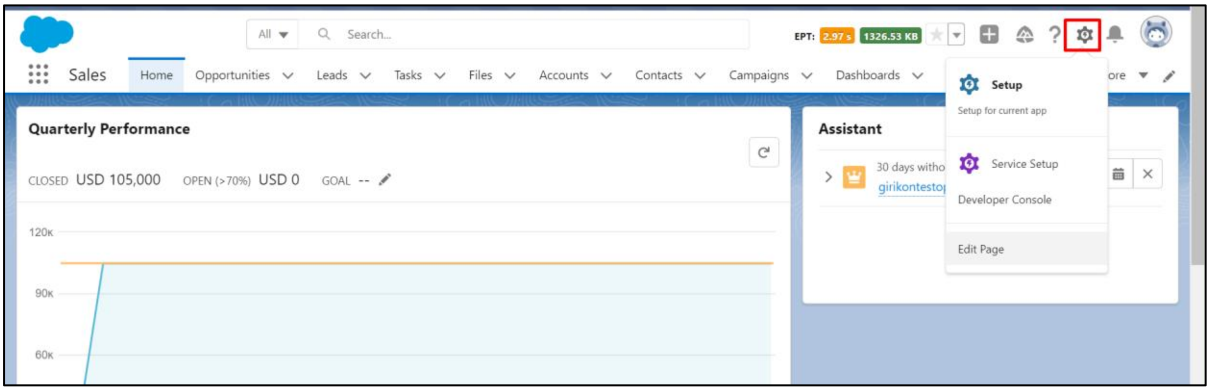


3.3 Setup Connected App

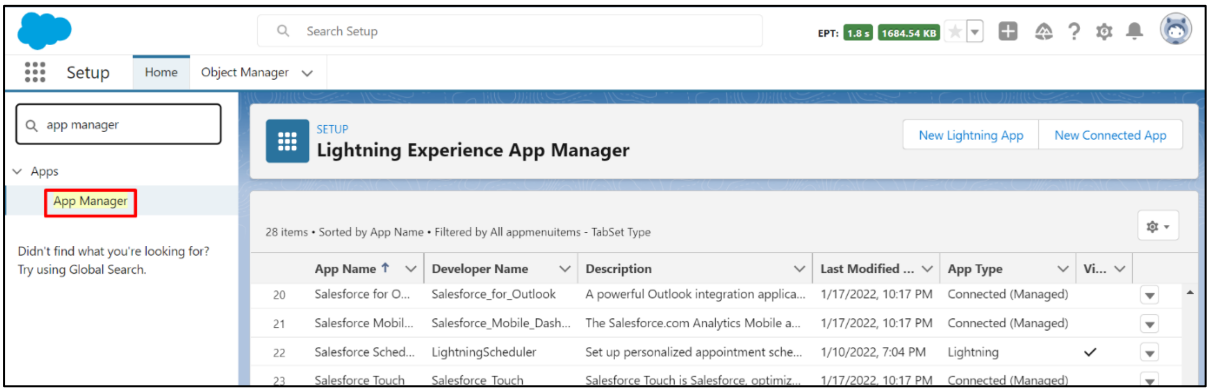
Setup a Connected App in Salesforce org to generate the Client Id (Consumer key) and Client Secret (Consumer Secret), so that the user can access Salesforce standard REST APIs.

Steps to Create Connected App

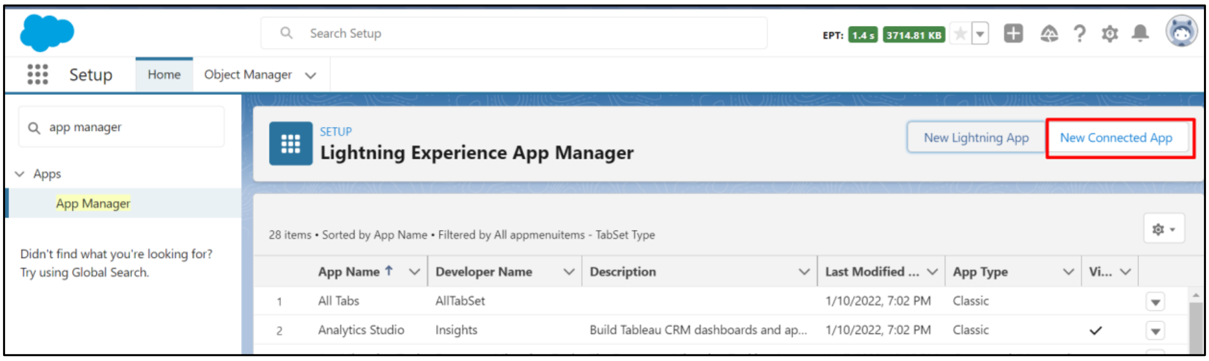
- Click the ‘gear’ icon in the upper right corner and then click on ‘Setup’.



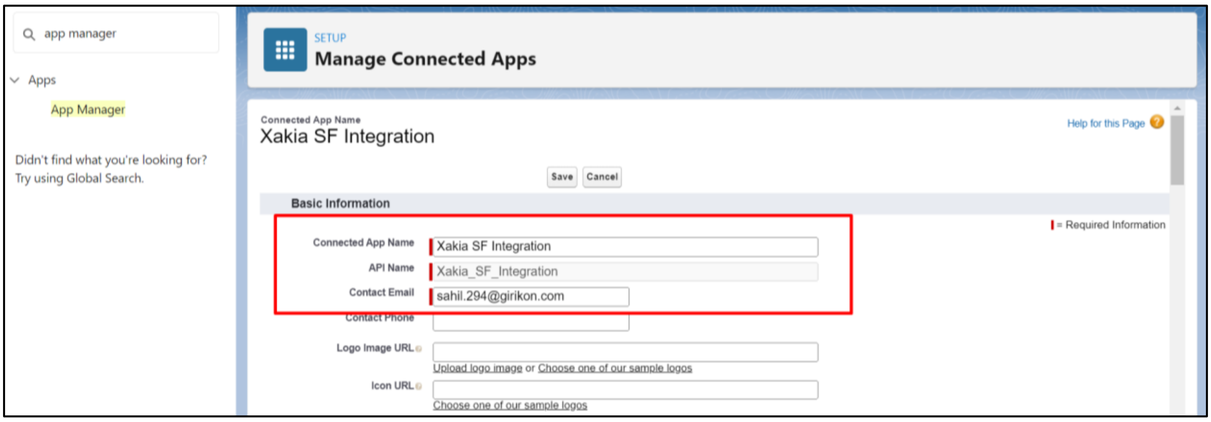
- Search ‘App Manager’ in the quick find box on the left hand menu and click on it.



❯ Click on the 'New Connected App' button in the top right corner of the window.

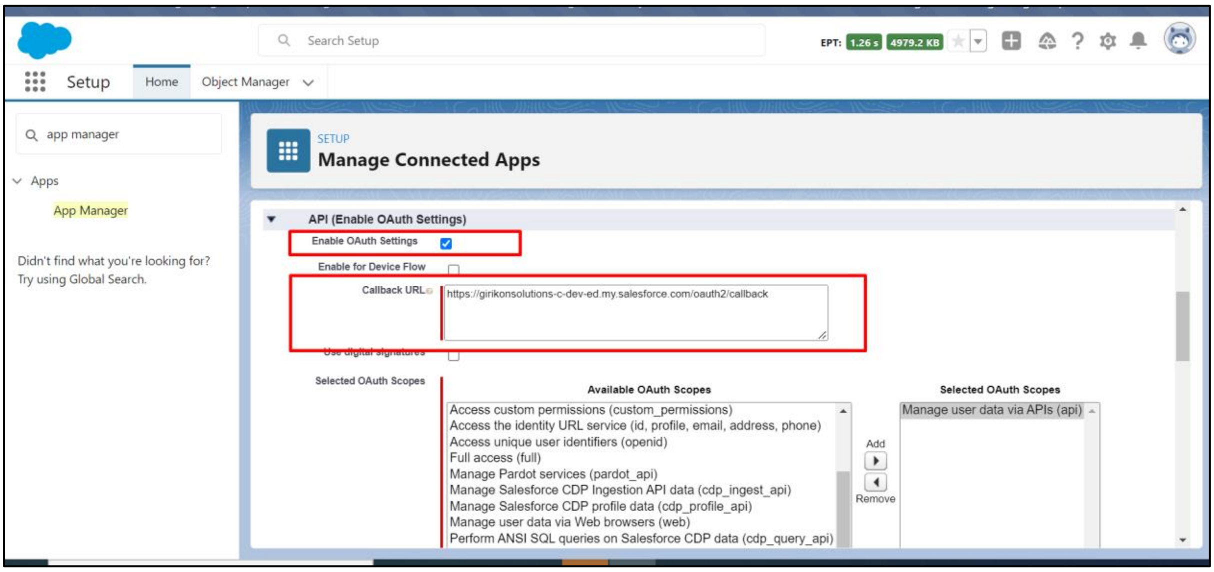


❯ Please fill the required details, including:
  - Enter the connected App Name. For example, 'Xakia SF Integration'. The API name will auto populate.
  - Enter a valid email address for the 'Contact Email' field.

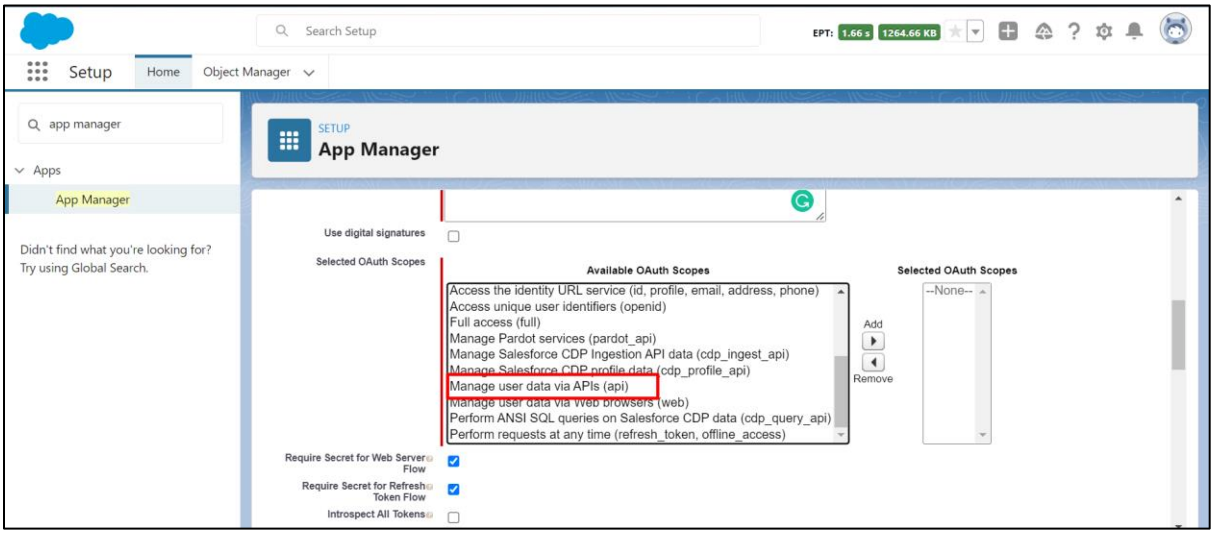


❯ Please tick the checkbox to 'Enable OAuth Settings'.

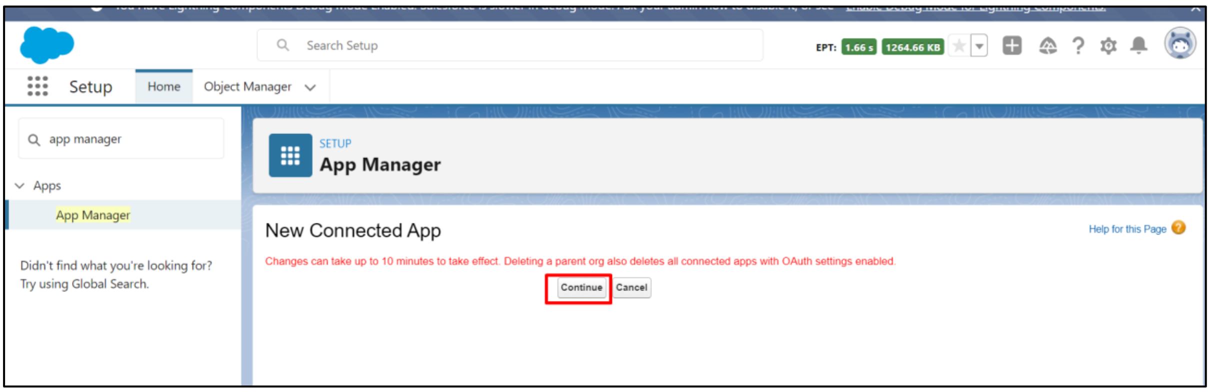
❯ Enter the value for the 'Callback URL' field. The Callback URL will be the user's current org URL. Please copy and paste the salesforce.com URL and add '/oauth2/callback' at the end of the URL.
For example: https://xakia-dev-ed.my.salesforce.com/oauth2/callback



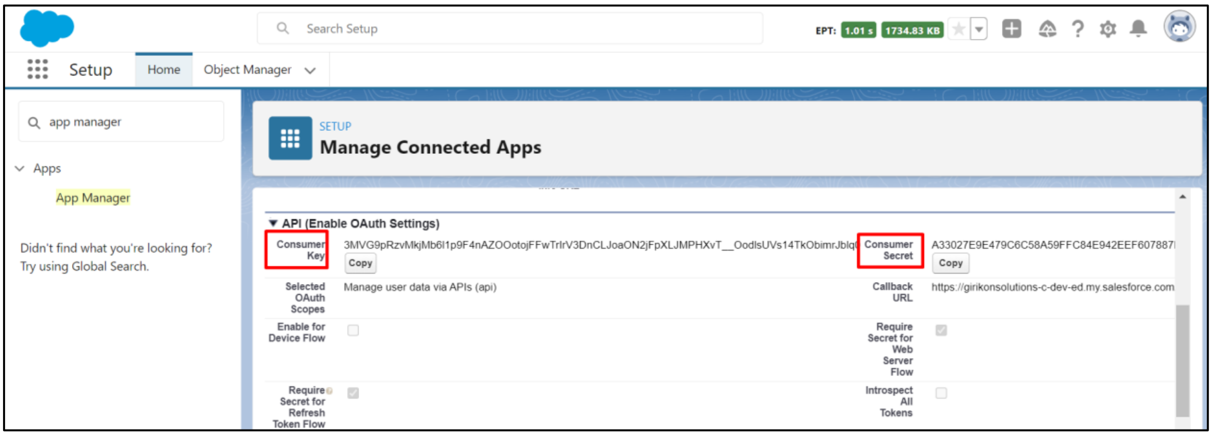
- Select 'Manager user data via APIs (api)' from available OAuth Scopes and add it to selected OAuth Scopes.



- Scroll down to the bottom of the screen and click on the 'Save' button.
- Once saved, please click on the 'Continue' button.



- You will now be able to see the consumer key and consumer secret. You can copy the values and use it to access Salesforce standard REST APIs.

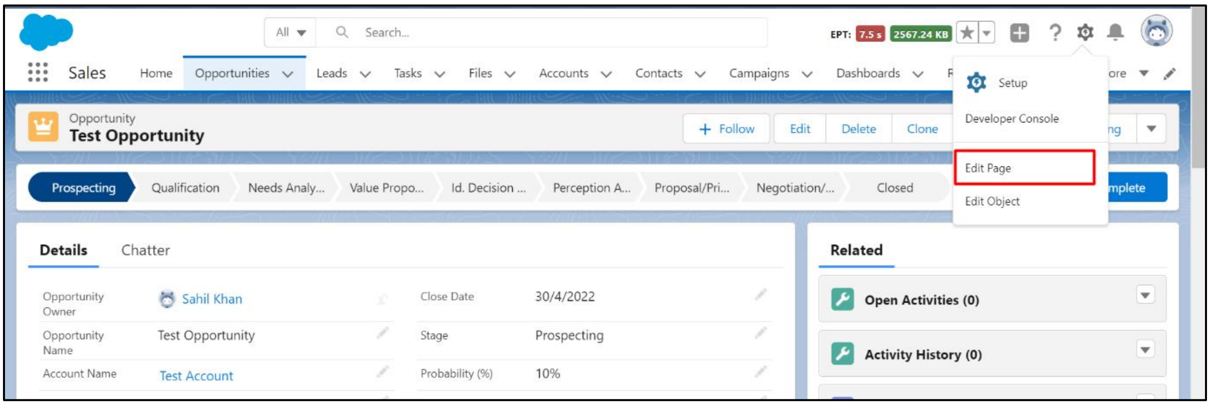


3.4 Add legal request form to opportunity record page

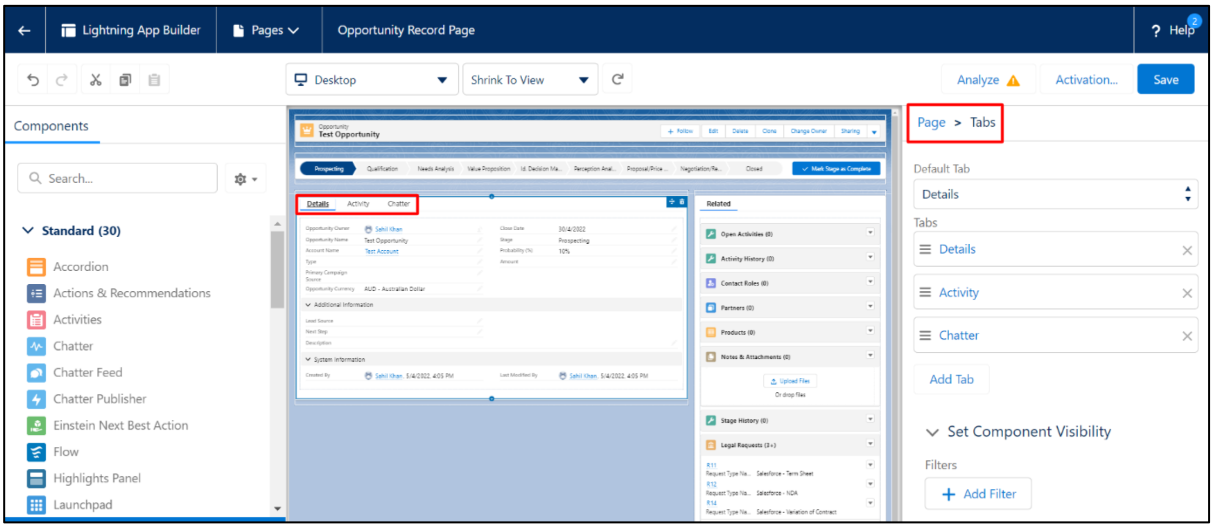
In this section, we will add a 'New Legal Request' tab to the opportunity object's lightning record page and add custom component for the legal request form to that tab.

Steps to add legal request form

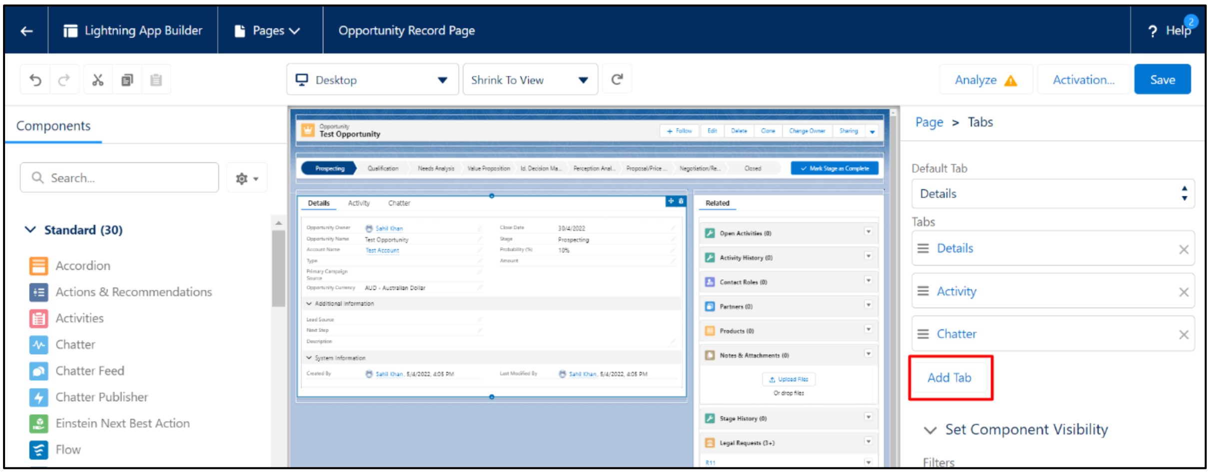
- Go to the detail page of an opportunity of type on which you want to see the legal request form and click on the 'gear' icon on top right corner of the screen
- click on 'Edit Page'.



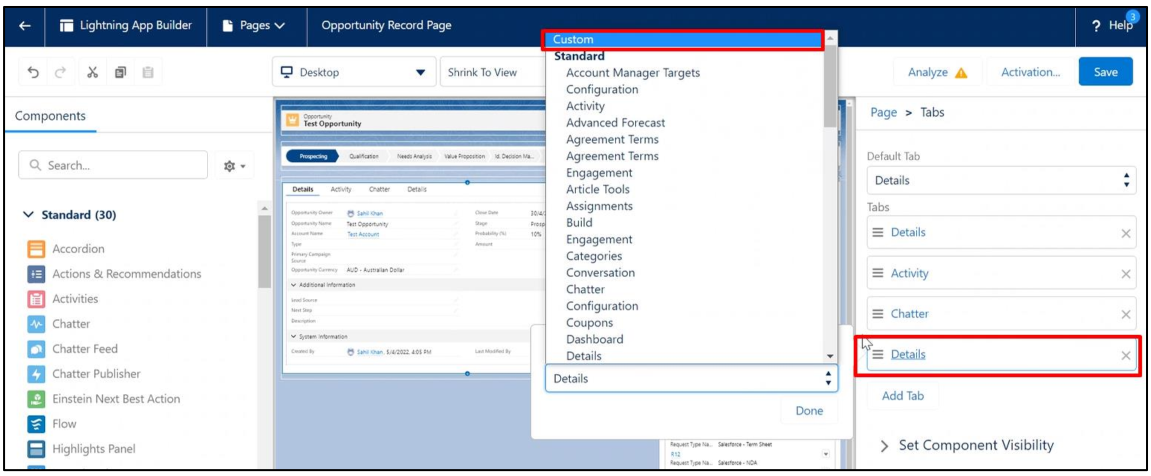
- You will be directed to the lightning app builder. User will need to search for the tab's components in the page area and then click on any existing tab available.



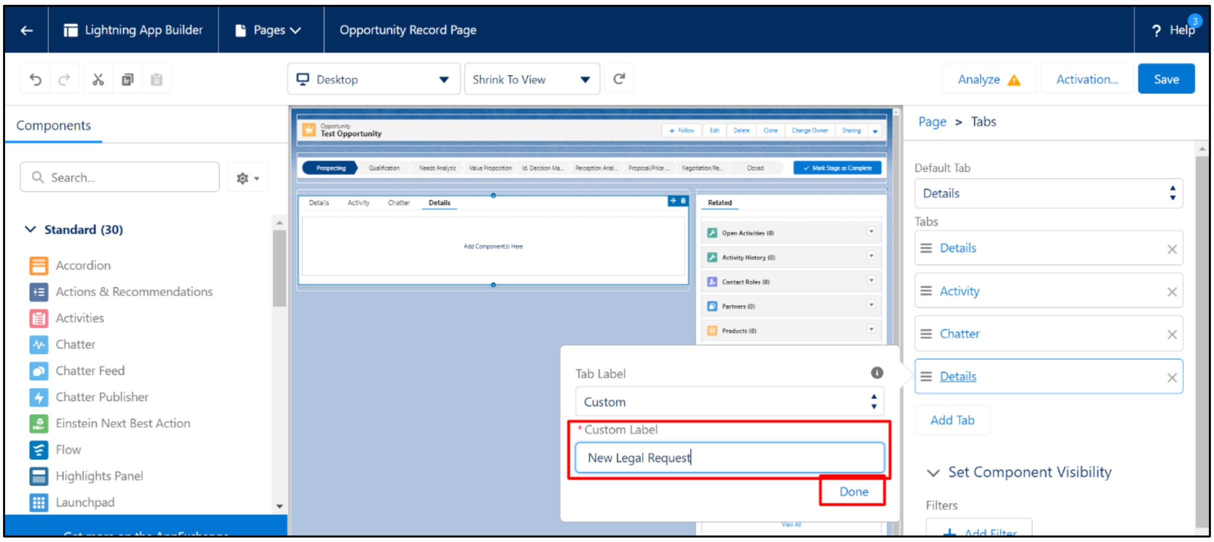
- Click on the ‘Add Tab’ button on the right hand side panel.



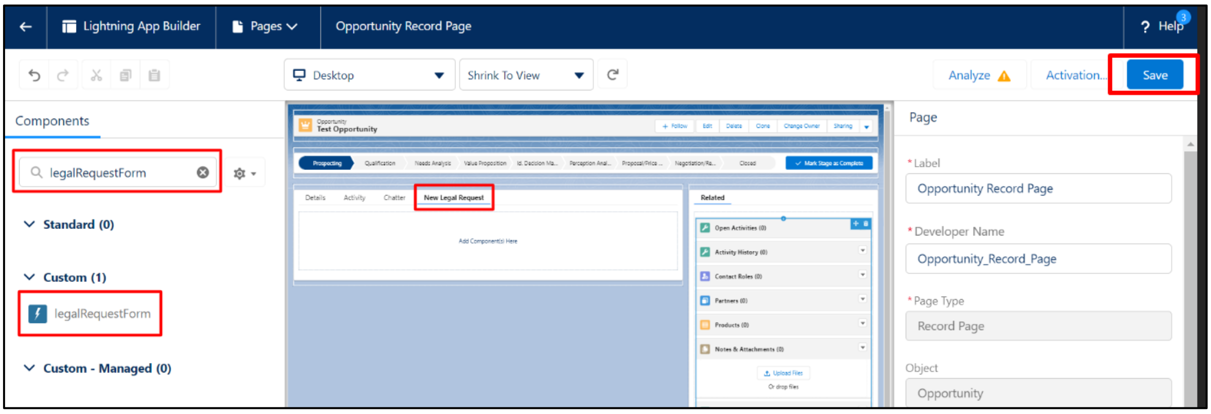
- A new tab will be added with a default name. Click on the new tab added and then click on the ‘Tag Label’ field appearing in the pop-up and choose the ‘Custom’ option.



- Type ‘New Legal Request’ in the custom label input field and then click on ‘Done’.



- Click on the 'New Legal Request' tab you have just created and search for 'LegalRequestForm' in the search box available in the left panel
- Drag the 'LegalRequestForm' custom component under the new legal request tab
- Click on the 'Save' button in the top right hand corner of the screen.

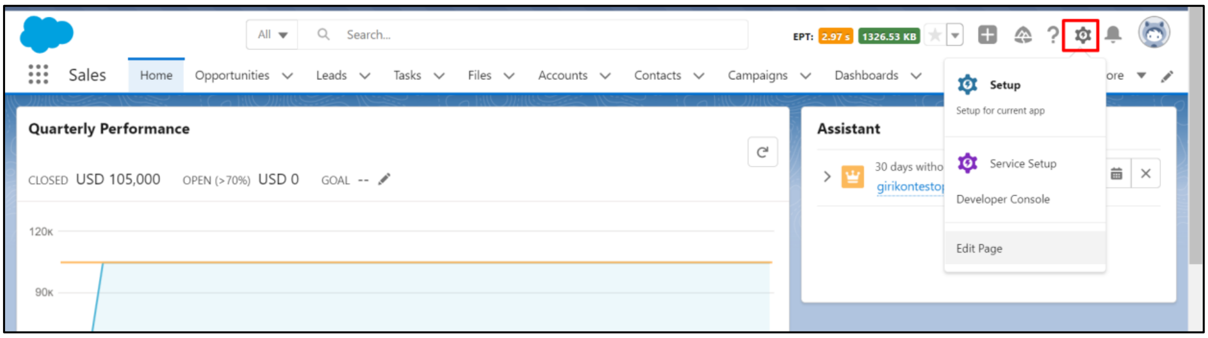


- If a pop-up appears on the screen and asks for activation, choose 'Assign as Org Default'.

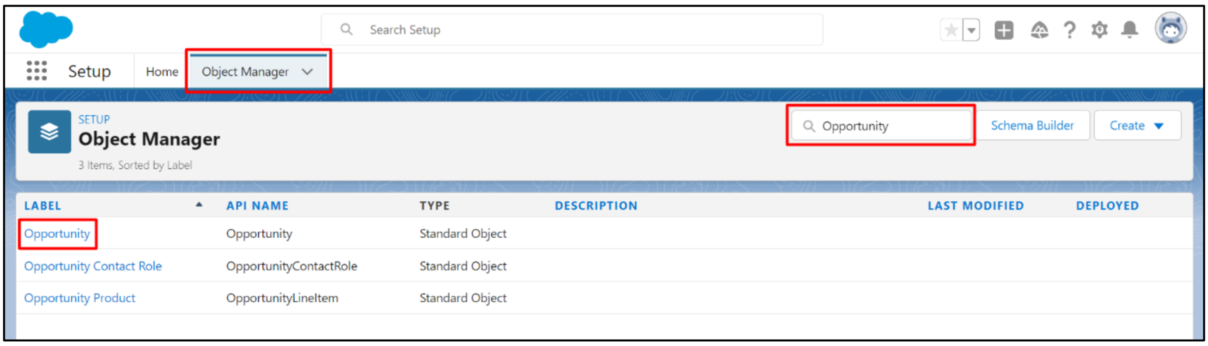
3.5 Add legal request related list to opportunity page-layout

Steps to add Legal Request related list to opportunity page-layout

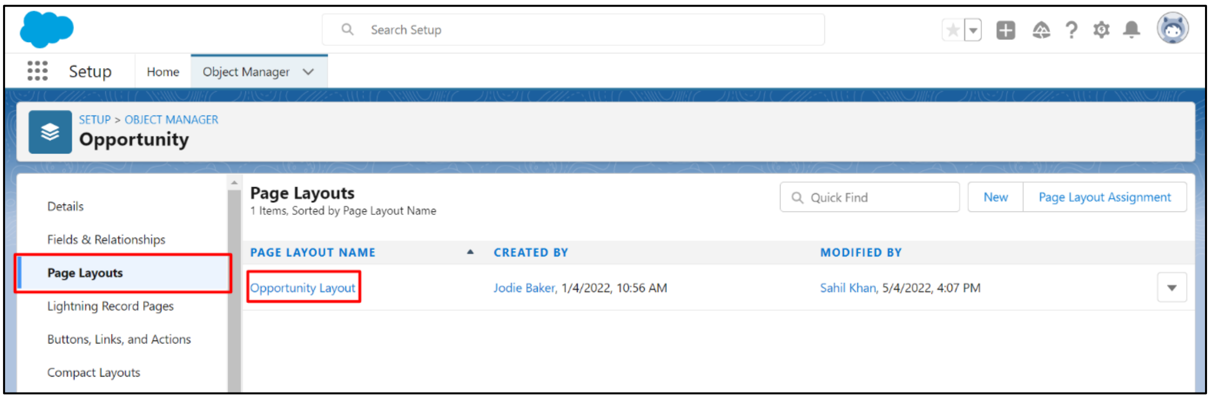
- Click the 'gear' icon in the upper right corner and then click on 'Setup'.



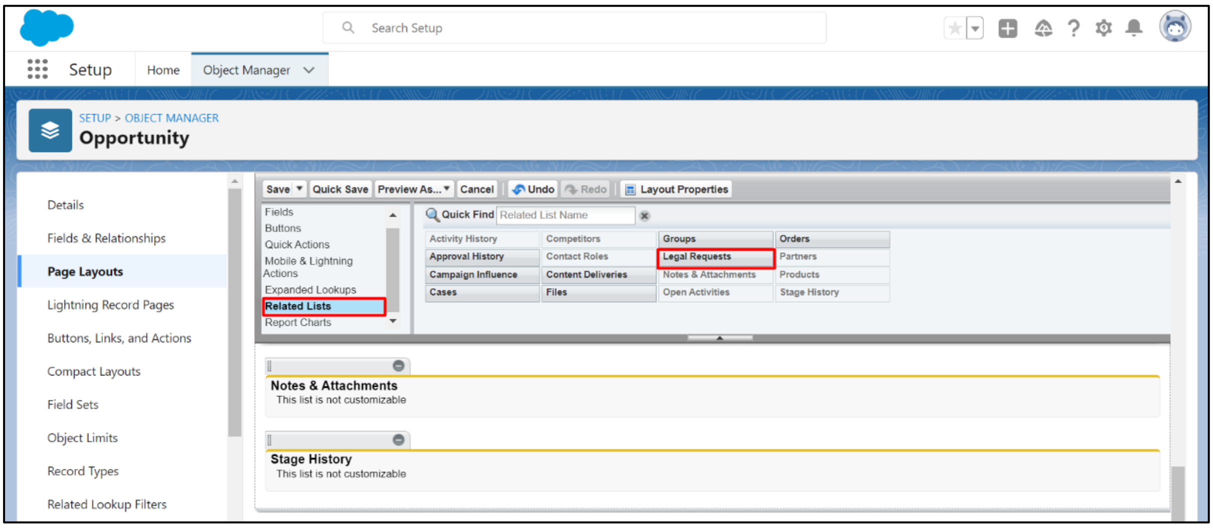
- Click on the ‘Object Manager’ tab and search for ‘Opportunity’ in the quick find box
- Click on the opportunity from the list of objects appearing.

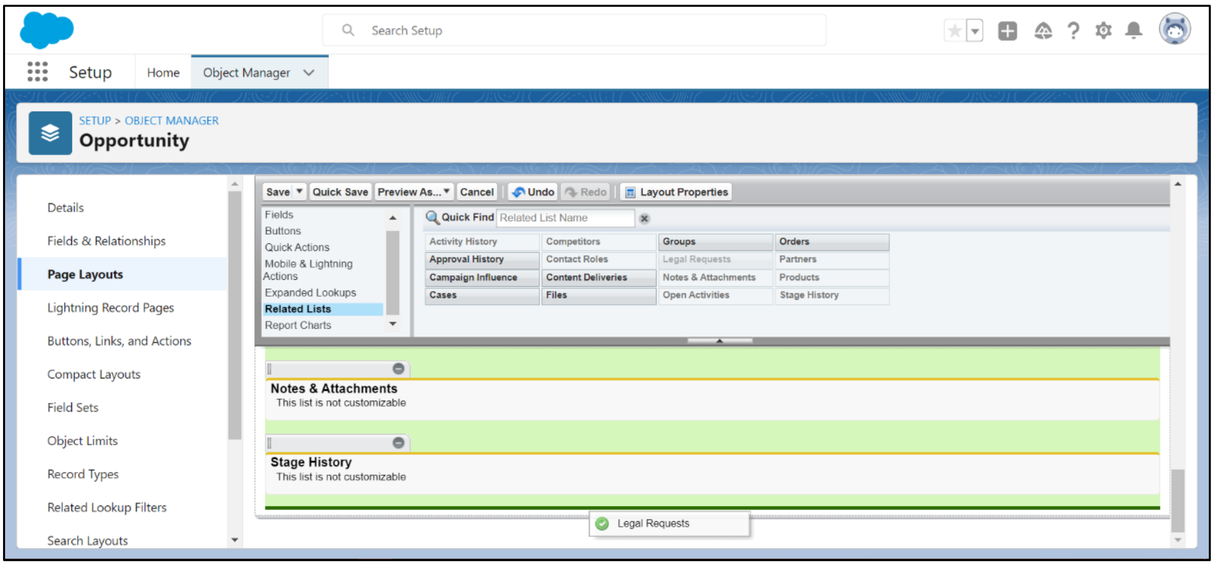


- Click on ‘Page Layout’ showing on the left side of the screen and choose the layout you want to add the legal request related list to.

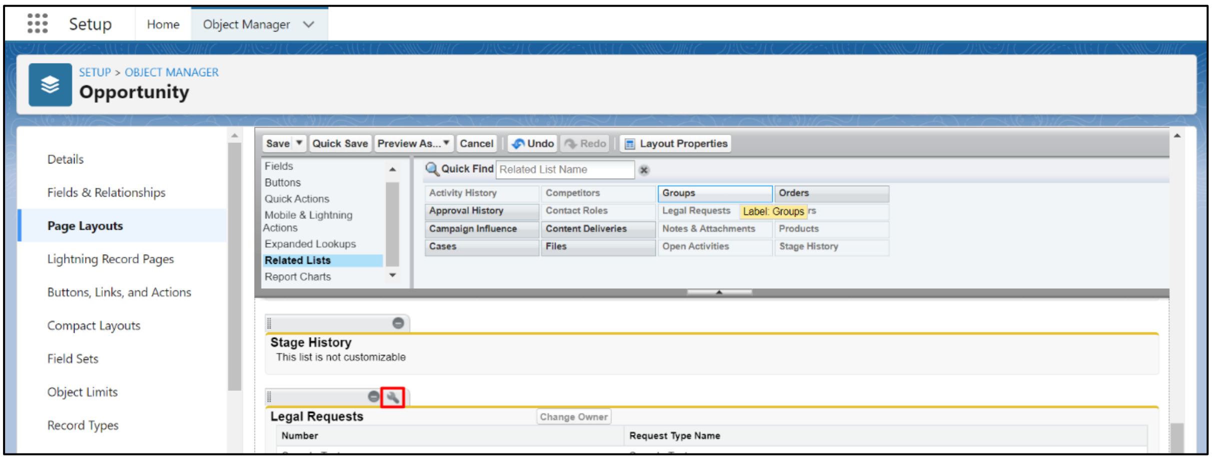


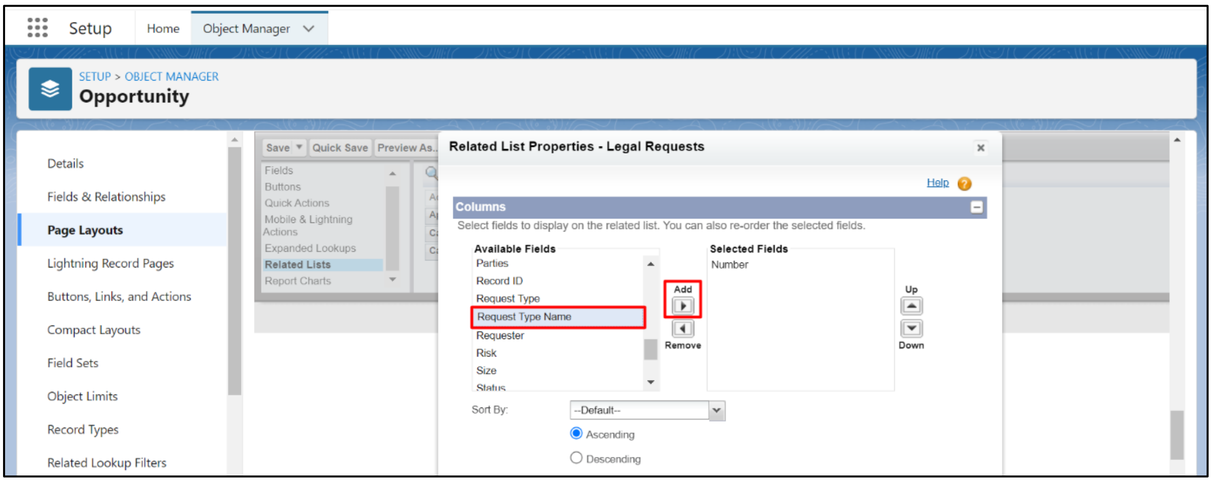
- Click on ‘Related Lists’ and drag the ‘Legal Requests’ related list to the bottom of the screen.



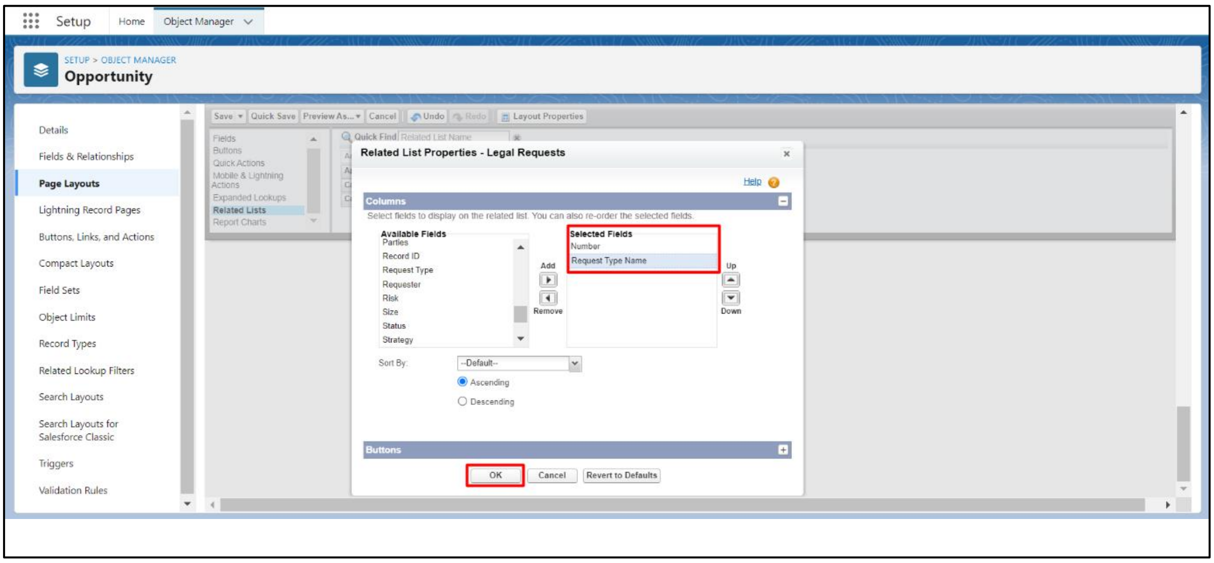


› Click on the wrench icon and a pop-up will appear on the screen. Search for 'Request type name' in the available fields list and add it to 'Selected Fields' by clicking the 'Add' button.

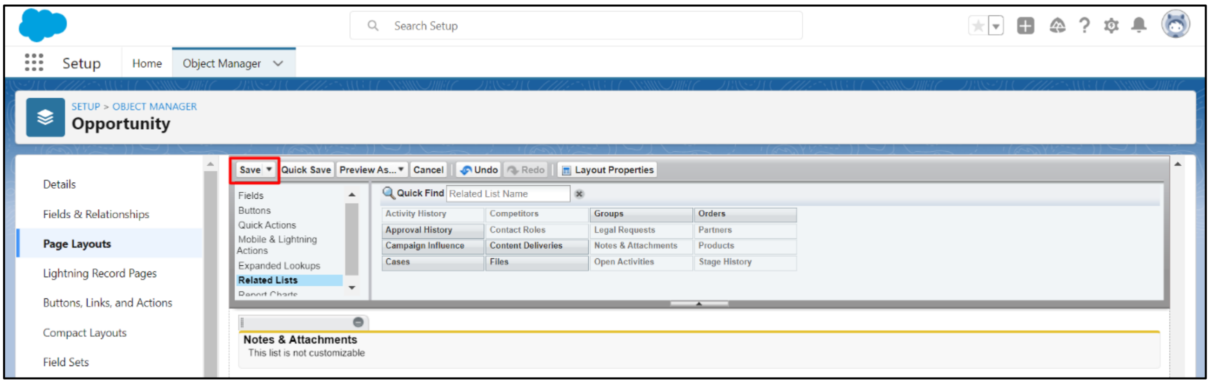




- You should have 'Number' and 'Request Type Name' in the 'Selected Fields' list
- Click on the 'OK' button.



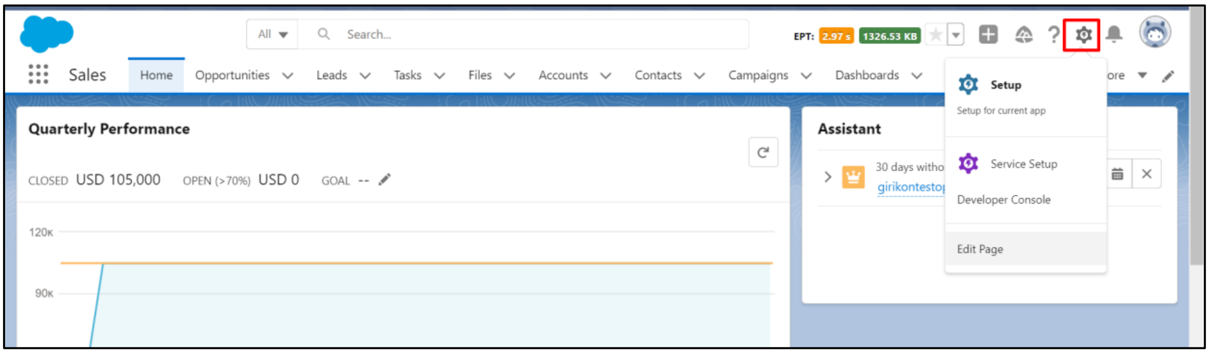
- Click on the 'Save' button.



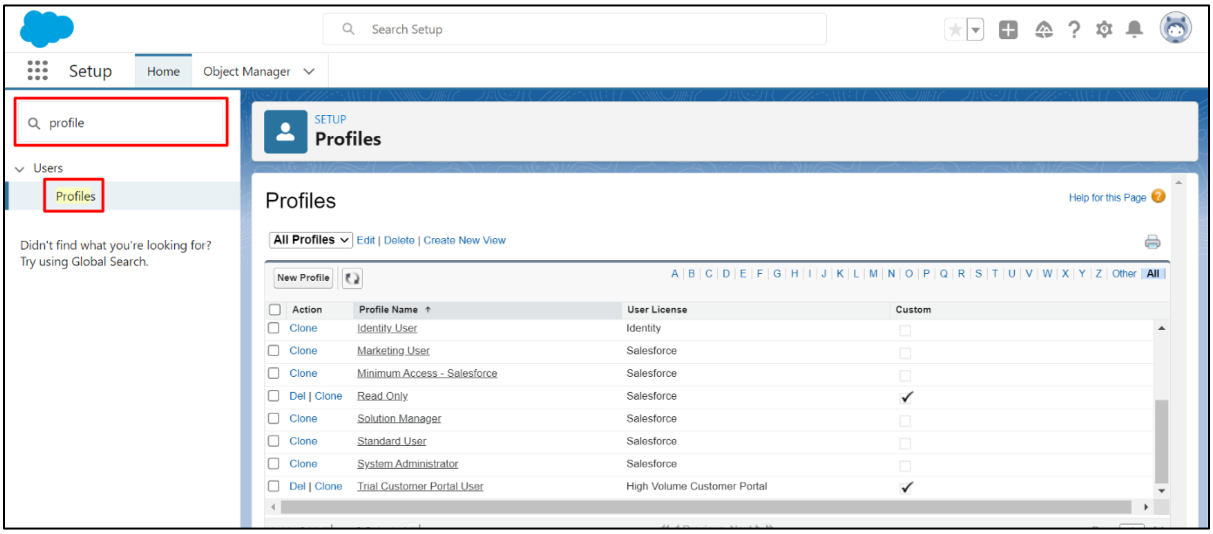
3.6 Create API Only User Profile

Steps to create API only user profile

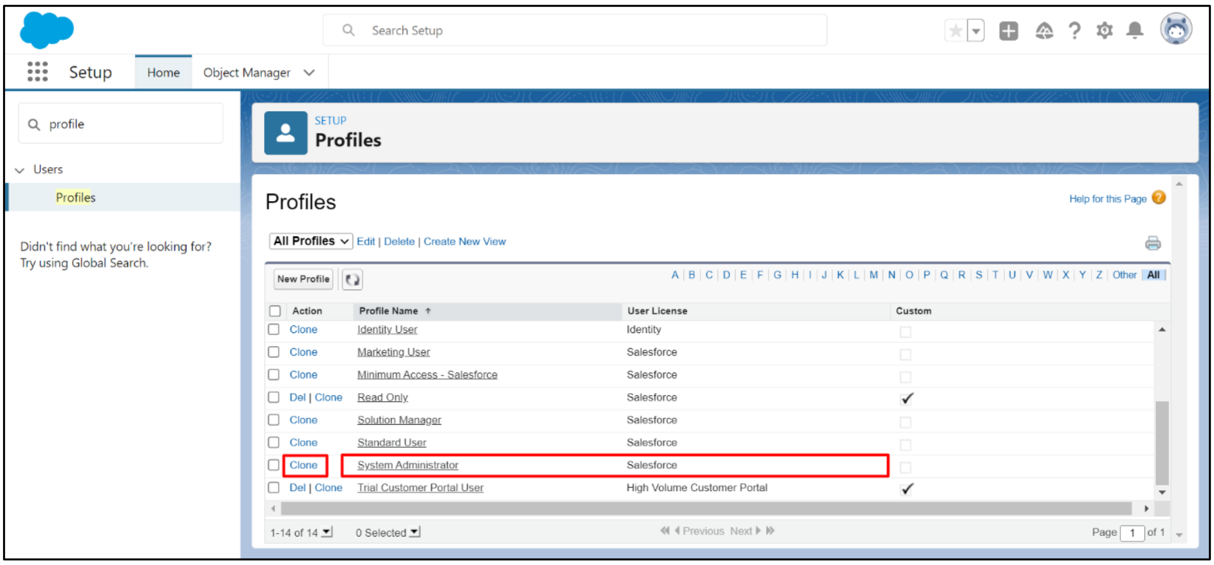
- Click the 'gear' icon in the upper right corner and then click on 'Setup'.



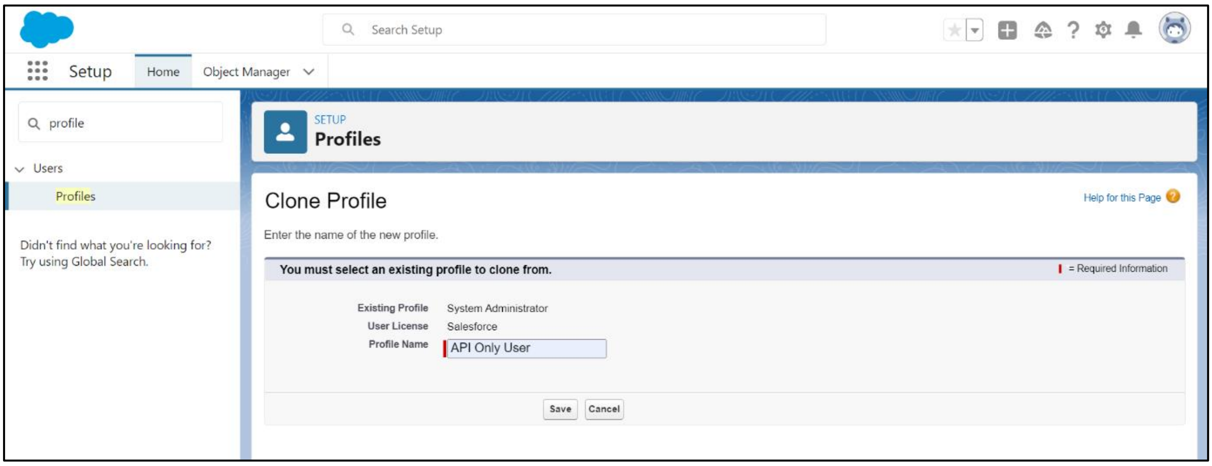
- Use the quick find box on the left hand side to search for 'profile'
- Click on 'Profiles'.



- Search for the 'System Administrator' profile from the 'All Profiles' list view and then click on 'Clone'.



- Name the profile as 'API Only User' and then click 'Save'.

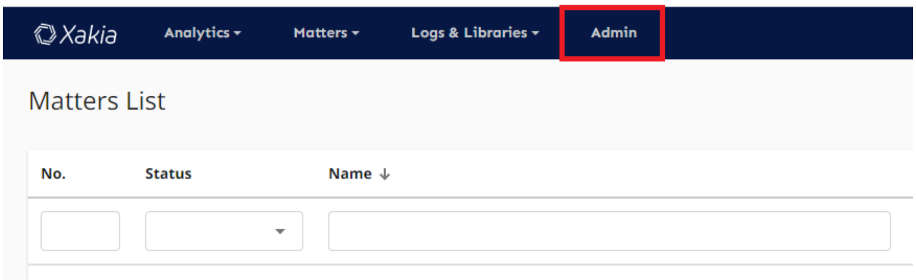


Note: Now that the 'API Only User' profile is created, you can assign it to a user. You can create a new user or you can use an existing one and assign this profile to the user. Do not login with this user in Salesforce as it is only to set up the integration. You will need to use this user profile to access the standard Salesforce REST APIs.

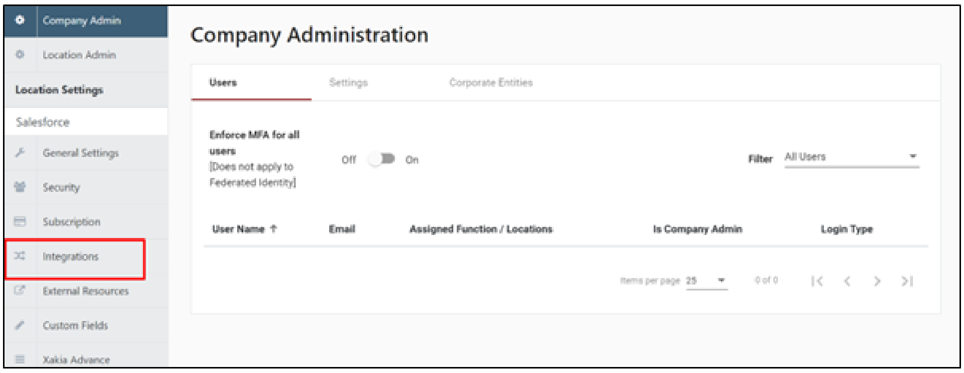
3.7 Salesforce CRM Integration

Below are the steps to set up some configuration on the Xakia side.

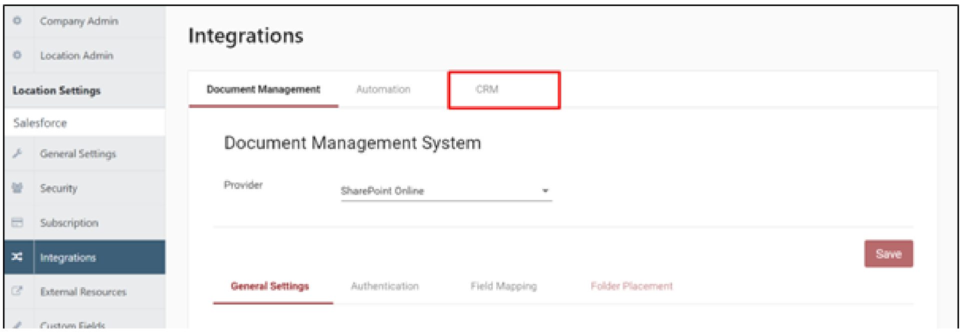
- Login to Xakia to which you want to connect your Salesforce org to and click on 'Admin' in the top navigation menu.



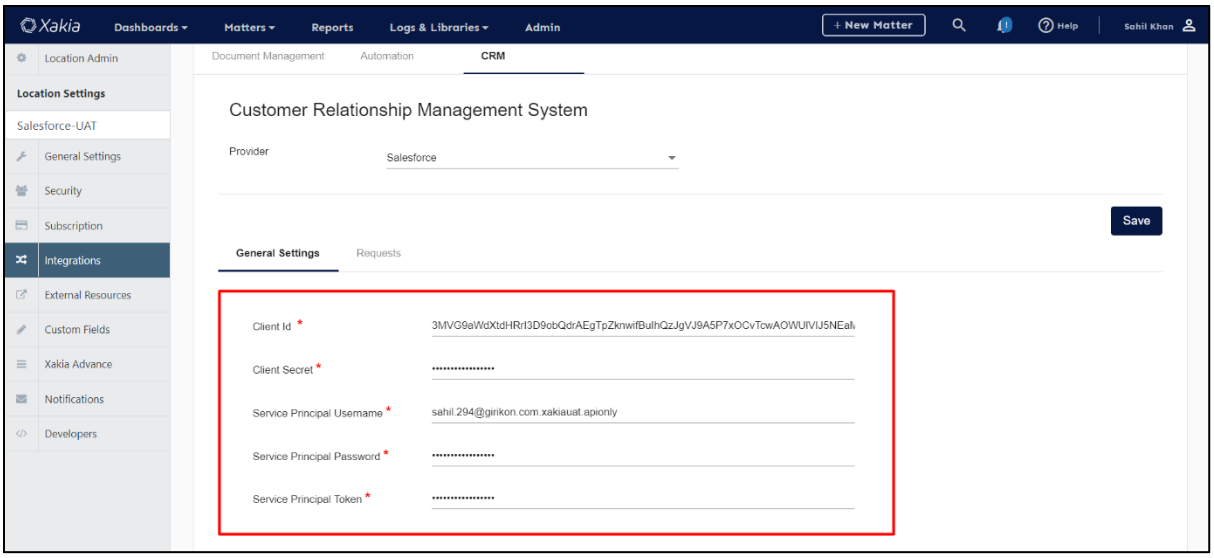
- Click on 'Integrations' from the left hand side panel.



- Click on the 'CRM' tab.

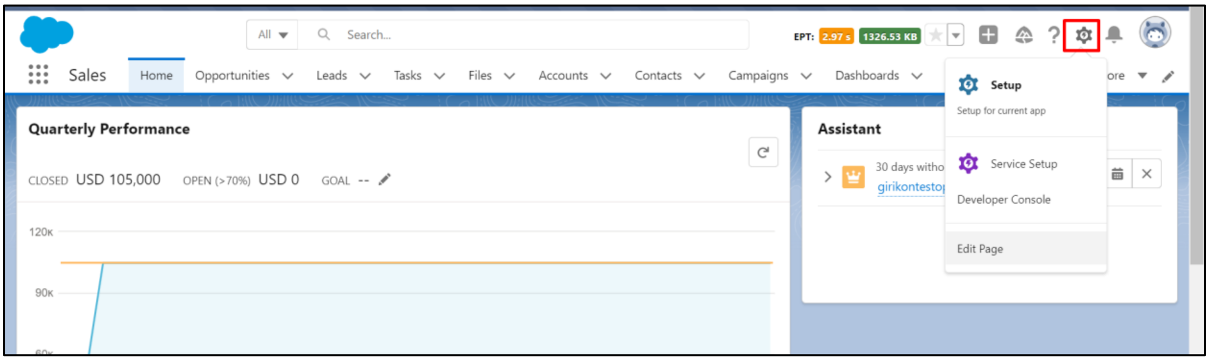


- Complete the required details:
  - Client ID: Client ID of your Salesforce org
  - Client Secret: Client Secret of your Salesforce org
  - Service Principal Username: Username of the user to which you have assigned the 'API Only User' profile
  - Service Principal password: Password of the user to which you have assigned the 'API Only User' profile
  - Service Principal Token: Security token of the user to which you have assigned the 'API Only User' profile

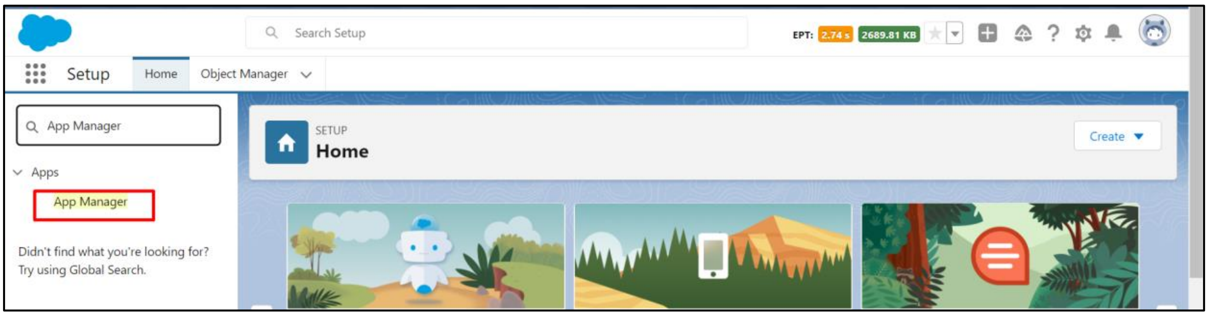


Steps to get Client ID and Client Secret

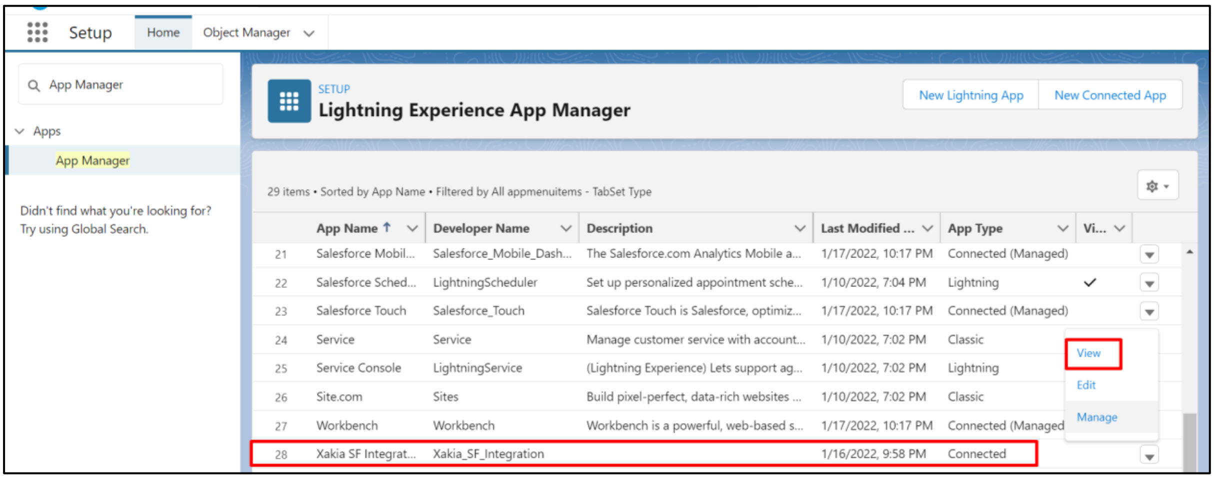
- Click the ‘gear’ icon in the upper right corner and then click on ‘Setup’.



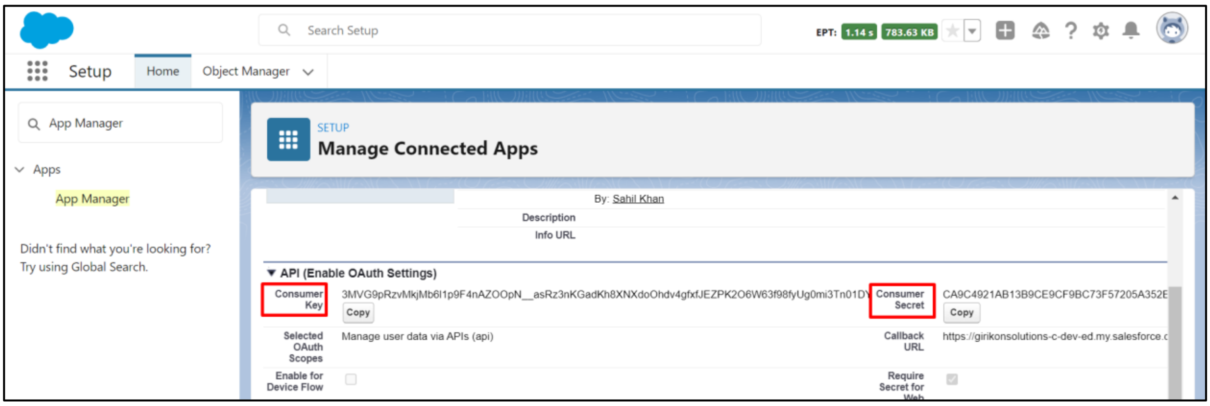
- Search ‘App Manager’ in the quick find box and click on it from the list.



- Find the ‘Xakia_SF_Integration’ App and from the list and click on ‘View’.



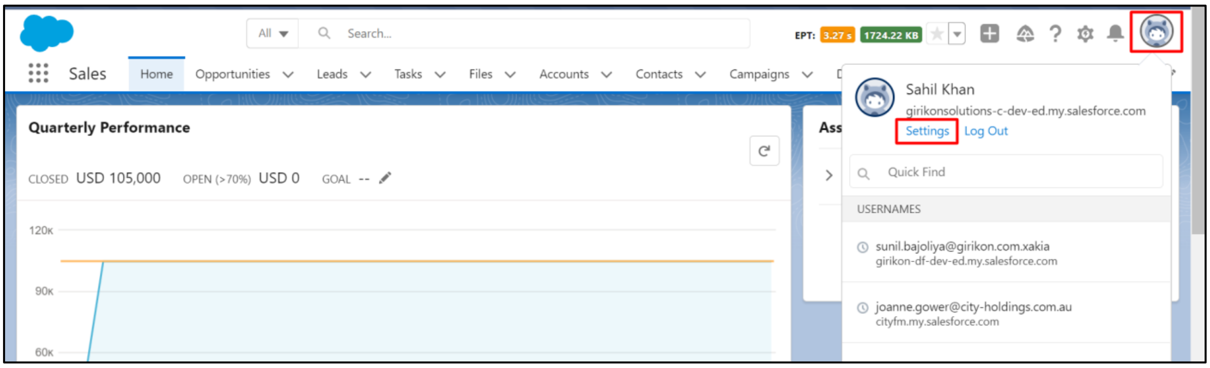
- You will now be able to view the Client ID (Consumer key) and Client Secret (Consumer Secret).



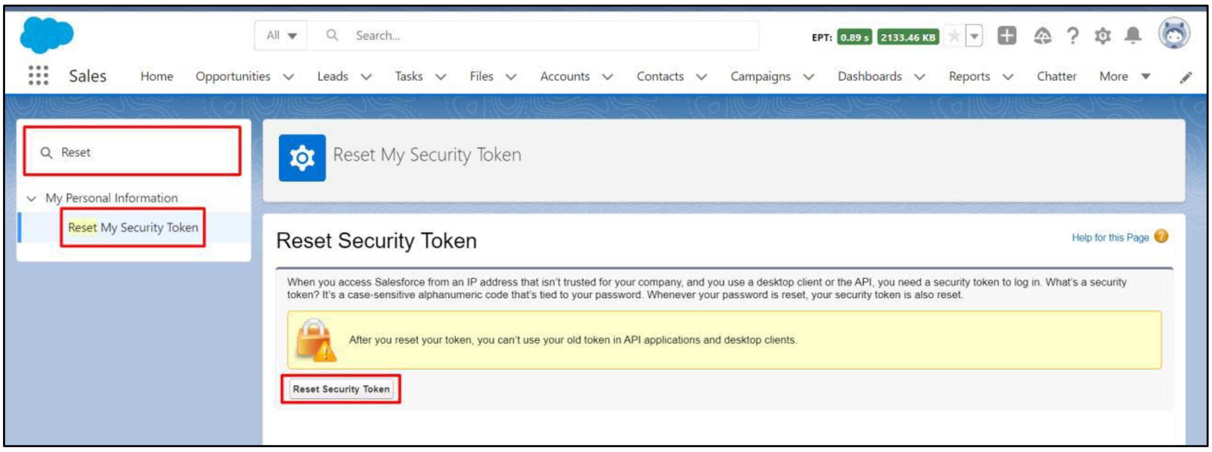
Steps to get the security token

A security token is a case-sensitive alphanumeric code that you append to your password. Below are the steps to reset your security token.

- Click on the 'View Profile' icon on top right corner of your Salesforce screen and then click on 'Settings'.



- From your personal settings, in the quick find box on the left, enter 'Reset' and then select 'Reset My Security Token'.



- Click 'Reset Security Token'. The new security token is sent to the email address in your Salesforce personal settings.

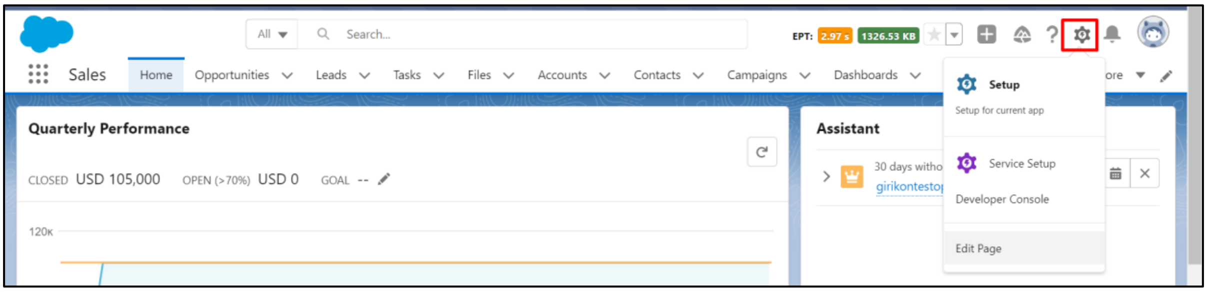
Note: Please follow the above steps for security token using the user which has the 'API Only User' profile.

3.8 Assign Permission Set to Users

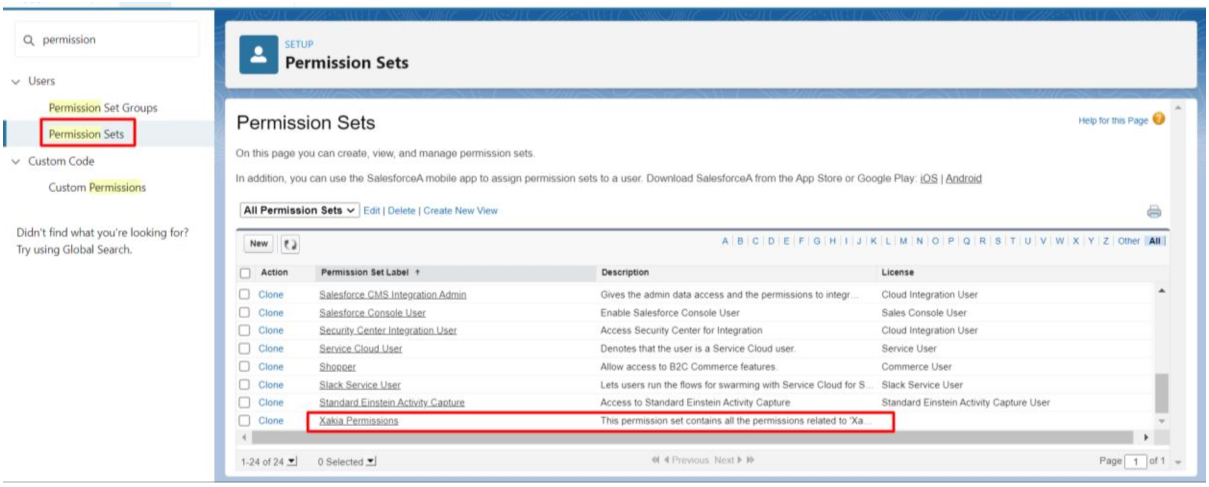
If any user does not have the required permissions to use the managed package functionality, you can assign a permission set to that user.

Below are the steps to follow to create your permission set.

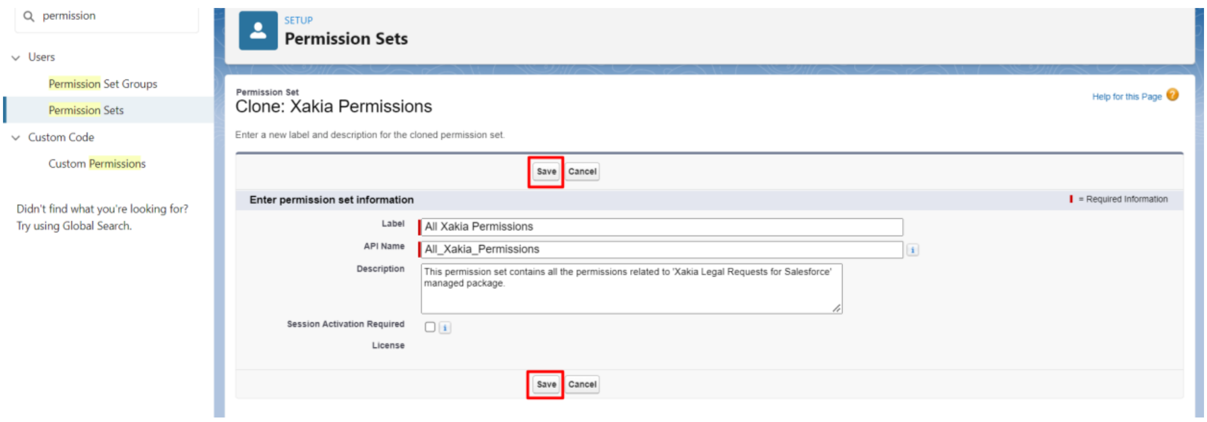
- Click the 'gear' icon in the upper right corner and then click on 'Setup'.



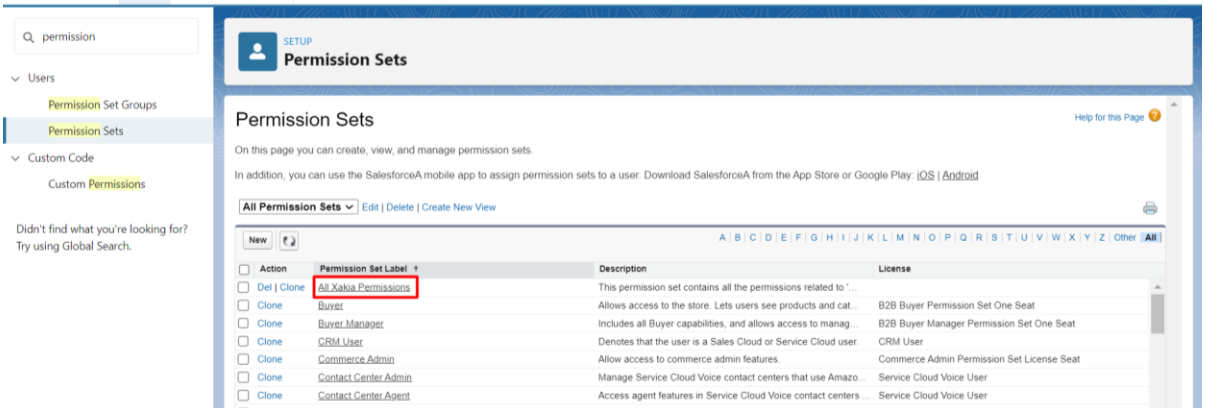
- Search 'permission' in the quick find box on the left and then click on 'Permission Sets'
- Search for 'Xakia Permissions' permission set from the 'All Permissions Sets' list view.



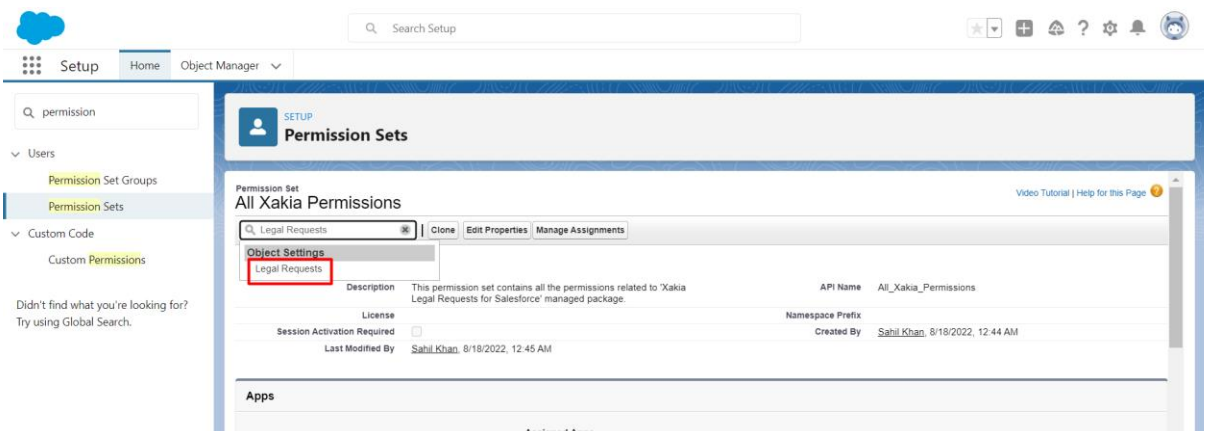
- Click on the 'Clone' action for 'Xakia Permissions'.
- Enter a new name for the cloned permission set and click 'Save'.



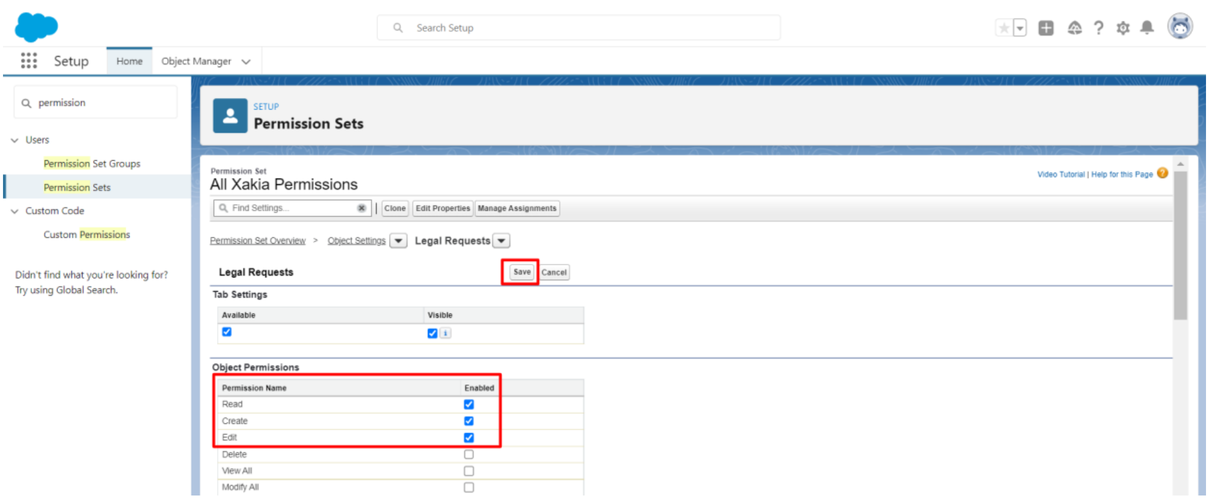
- Search for your cloned permission set from the ‘All Permission Sets’ list view and click on the label.



- Search for ‘Legal Requests’ in the ‘Find Settings…’ search box and click on ‘Legal Requests’.



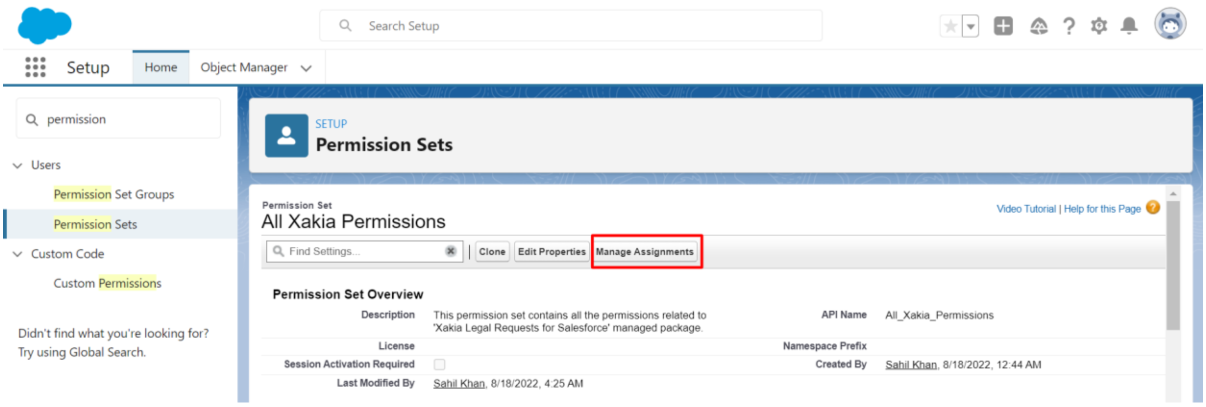
- Click the ‘Edit’ button and tick the ‘Read’, ‘Create’ and ‘Edit’ checkboxes under ‘Object Permissions’ to enable it. Click ‘Save’.



Note: This only needs to be done once. This will allow you to assign this permission set to any number of users.

Below are the steps to assign this permission set to any user.

- Go to your cloned permission set as mentioned in the above steps and click on 'Manage Assignments'.



- Click on the 'Add Assignments' button and select the users you want to assign this permission set to.
- Click the 'Assign' button and then click 'Done'.