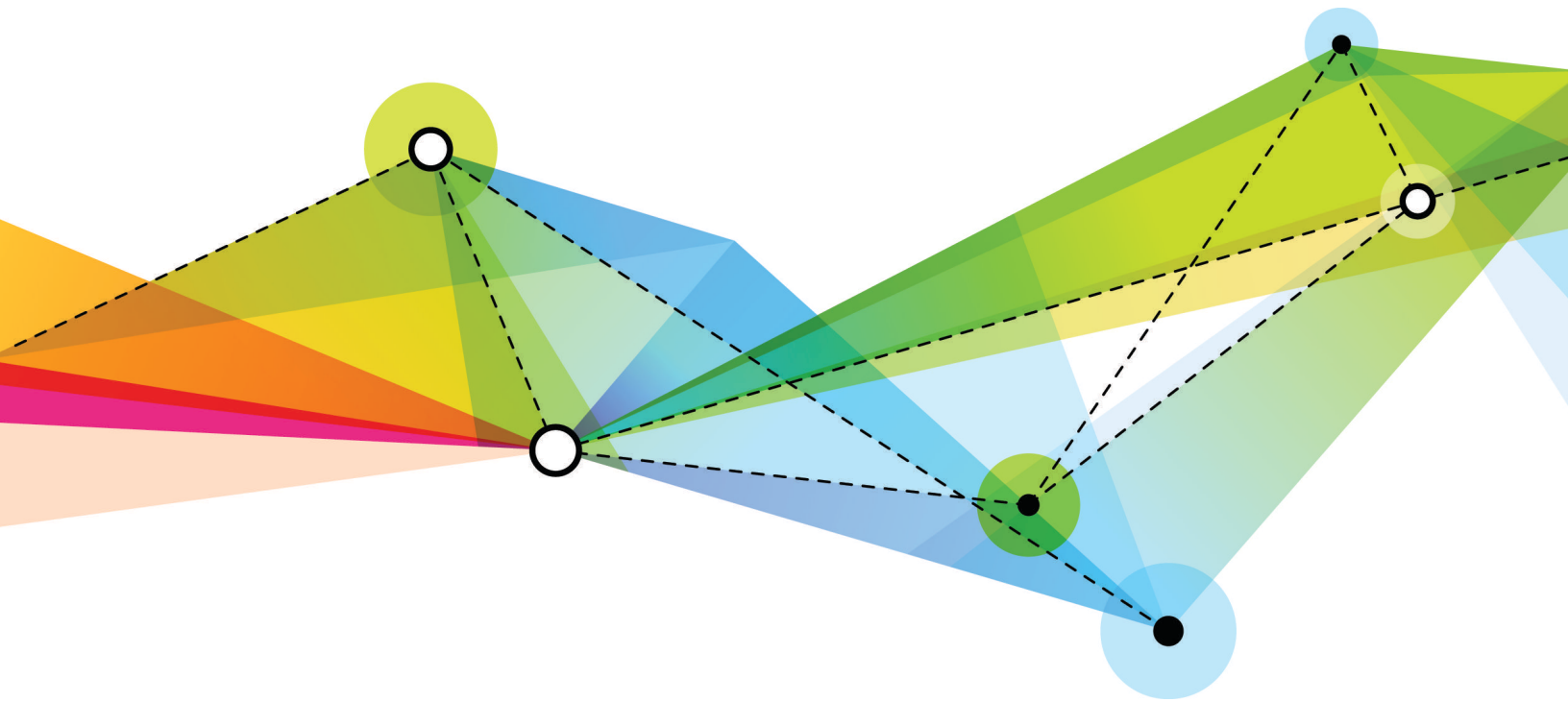




Smileforce - Installation

Quick Reference Guide



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Suite 801, 620 Bourke St, Melbourne, Vic 3000, Australia

www.inomial.com • +61 3 9663 3554 • sales@inomial.com • support@inomial.com

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Introduction

Smileforce is a Salesforce app that can provide Salesforce users with a window into Smile.

This window is a read-only view of a Smile account's state. State information that could be informative to sales staff. For example, "Before I visit this customer let me see how current their account is and what their recent spend history has been."

The following screenshot displays an example of the Smileforce view of a Salesforce account. In this example it is in a section titled **Smile – Billing Snapshot**.

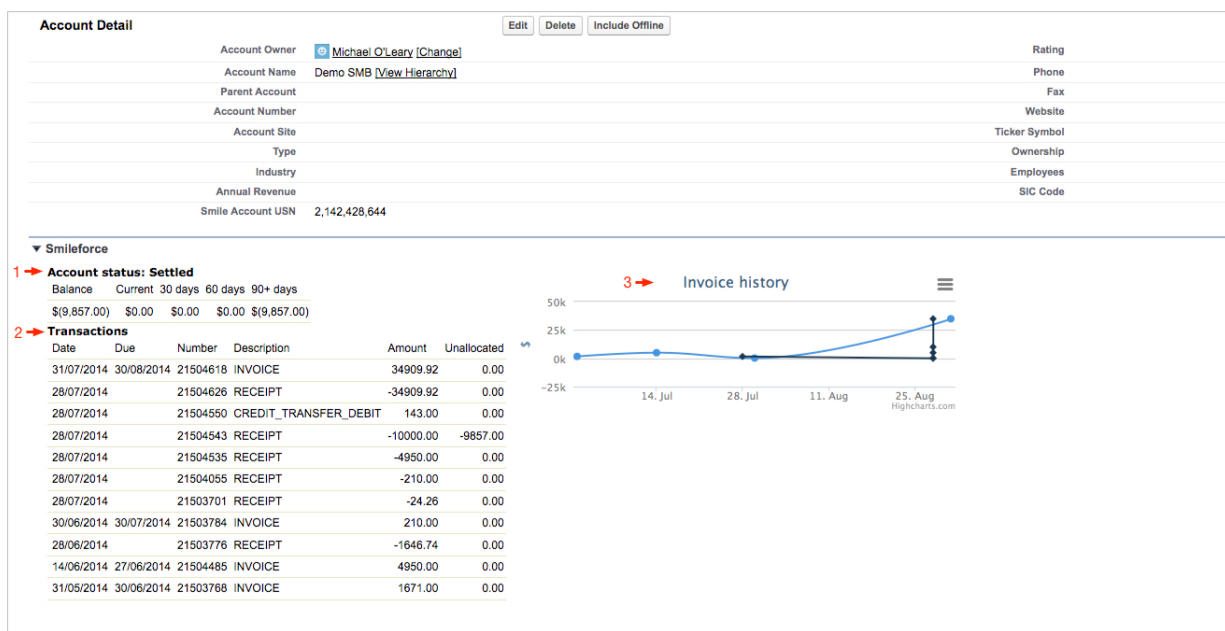


Figure 1: An example Smileforce view of a Salesforce account

All Smile data is current. The Smileforce view displays the following information:

- 1 The trial balance with the account's current treatment level, or disposition. In this example it is *Settled*.
- 2 List of transactions against the account.
- 3 Graph showing invoice and payment history.

The data is displayed from Smile dynamically. This means that there is no Salesforce storage cost, but also that Salesforce cannot be used for reporting.

The **Smile Account USN**, which is installed as part of the Salesforce package, has to be loaded to the relevant Salesforce Account to direct Smileforce to the related Smile account.

Prerequisites

Before installing the Smileforce app, the following must be established:

Administrator access

Administrator access to the recipient Salesforce instance for installing Smileforce. Contact Inomial for the Salesforce app credentials which include the app URL and password.

Account layouts / Salesforce profiles

You will need to change the Account layout(s) for the Salesforce profiles that are to access Smileforce, therefore you will need to identify the relevant Account layout(s).

SOAP access

A SOAP user logon to the relevant Smile instance. Contact Inomial to arrange this.

SSL certificate

The Smile instance must have an SSL certificate as access is via https. An SSL certificate is in place for all Smile instances hosted by Inomial.

Link account information

For Smileforce to display information from Smile a common key unique to the accounts of both systems is required. To achieve this link a Smile Account USN is set in the Smileforce Smile Account USN field. For each Smile account you wish to view in Salesforce you will need:

- the Smile USN
- a Salesforce account from which to view the Smile account

You can generate a report from Smile of USNs and account details and use a tool like Salesforce Data Loader to create or update the related Salesforce accounts.

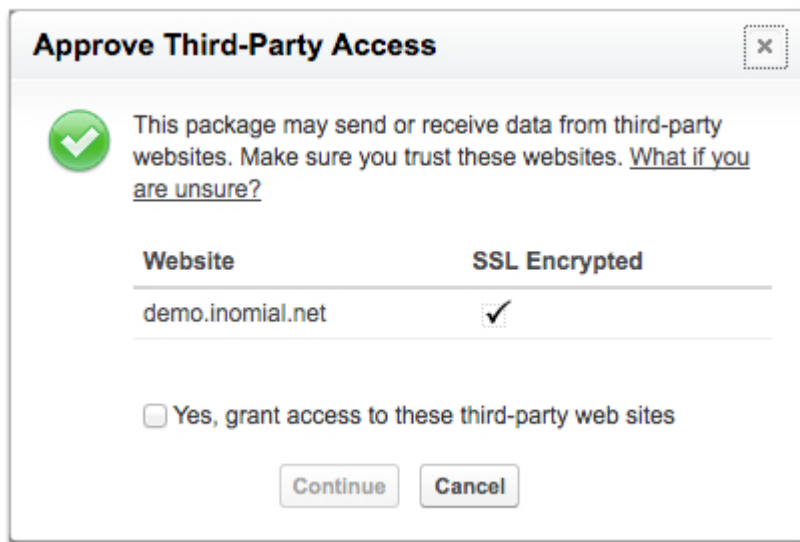
Installation of Smileforce

This task explains how to install the Smileforce app.

1. Login to the recipient Salesforce.
2. In a browser enter the following address:

`https://cs6.lightning.force.com/packaging/installPackage.apexp?p0=<contact_inomial>`

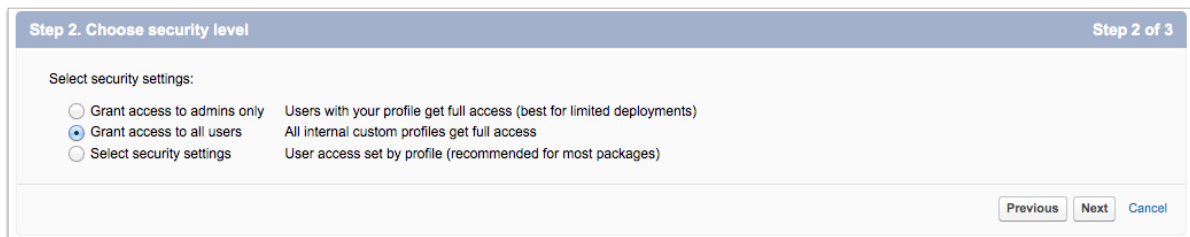
An **Approve Third-Party Access** window is displayed.



3. Select **Yes, grant access to these third-party web sites**. Click **Continue**.

The address `demo.inomial.net` is a placeholder for this example. The URL of your own Smile instance will be displayed.

A **Choose security level** window is displayed.



4. Select **Grant access to all users. Click **Next**.**

Package components is displayed.

Package Components		
Action	Name	Type
	Smile Parameters	Custom Object
	smileTestData	Apex Class
	Username	Custom Field
	Smile	Remote Site
	smileTransactionsCon	Apex Class
	smileTransactions	Visualforce Page
	smileTransactionsConTest	Apex Class
	Password	Custom Field
	Endpoint URL	Custom Field
	Smile Account USN	Custom Field

Configuration of Salesforce

Salesforce requires configuration to display Smile details. Configuration is completed in **Salesforce Setup**. This task explains how to configure the Salesforce environment.

1. Navigate to **Build > Develop > Custom Settings**. Click **Manage** to the right of **Smile Parameters**, then click **New**.

The Smile Parameters Edit page is displayed.

2. Enter the SOAP credentials supplied by Inomial in the **Smile Parameters Information** fields. Click **Save**.
3. Navigate to **Administer>Security Controls>Remote Site Settings**.

The Remote Site Edit (Managed) page displayed.

4. Type the URL in the **Remote Site URL:** field. Click **Save**.

The remote site URL is the same as the endpoint URL entered in the previous step.

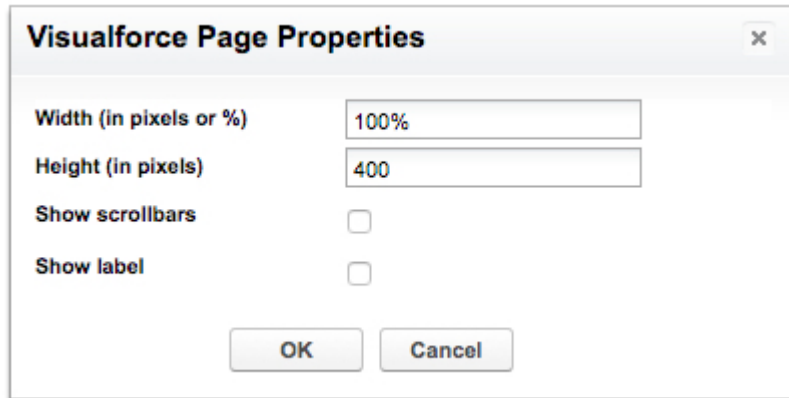
5. Navigate to **Build>Customize>Accounts>Page Layouts**. Update the profile **Page Layout(s)** for each Salesforce user that will access Smileforce

a. Add **Smile_Account_USN** to account layout.

b. Add a section with a single column.

The recommended name is *Smile - Billing Snapshot*.

c. Add the **smileTransactions Visualforce** page.



The image shows a 'Visualforce Page Properties' dialog box. It has a title bar with a close button (X). Inside, there are four fields: 'Width (in pixels or %)' with a value of '100%', 'Height (in pixels)' with a value of '400', 'Show scrollbars' with an unchecked checkbox, and 'Show label' with an unchecked checkbox. At the bottom, there are 'OK' and 'Cancel' buttons.

d. Enter *400* in the **Height (In pixels)** field. Click **OK**.

Test Salesforce

After installation of the Smileforce app and configuration of Salesforce, Smileforce is installed. You can test the installation by the following methods:

Smile account USN

Enter a Smile account USN in the **Smile Account USN** field in a Salesforce account and click **Save**. If the installation was completed successfully and access is allowed, the Smile data is displayed in the relevant Account layout section.

Download Smile account data and compare to Salesforce

Download all Smile Account USNs and some related data into a CSV from Smile and compare to the data displayed in Smileforce.

This task explains how to download a CSV from Smile.

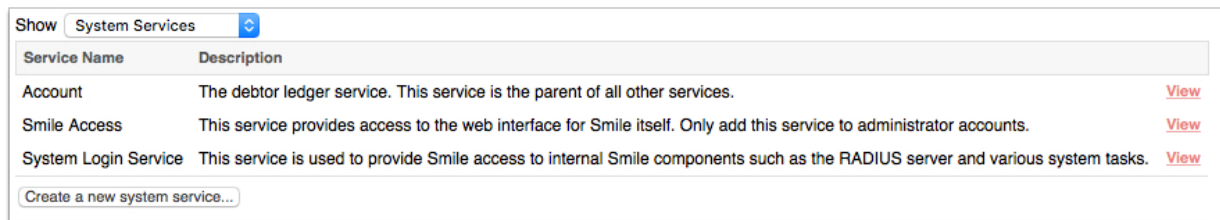
1. In Smile, go to **Configuration and Tools**.

The Configuration and Tools page is displayed.

2. Select **Services and Plans** under **Services, Ordering and Rating**.

The Services and Plans page is displayed.

3. Select **System Services** from the **Show** drop-down.



Show	System Services	
Service Name	Description	
Account	The debtor ledger service. This service is the parent of all other services.	View
Smile Access	This service provides access to the web interface for Smile itself. Only add this service to administrator accounts.	View
System Login Service	This service is used to provide Smile access to internal Smile components such as the RADIUS server and various system tasks.	View
Create a new system service...		


The service list is updated with system only services.

4. Click **View** to the right of the **Account** entry.

The Account Service **Billing** tab is displayed.

5. Select the **Settings** tab. Click **Users** at the bottom of the page.

The Service Users page is displayed.

Tools > Services and Plans > Account Service > Service Users				
UCN	Name	Service ID	Email Address	
2142420773		2142420773	michael@example.com	View
1000000024	Sales, Cash	1000000024	cash-sales@example.com	View
2142420641	Graveyard Account	2142420641		View
2142420625	System Services Account	2142420625		View
2142420658	Sample, Alfred	2142420658	michael@example.com	View
1000000008	Administrator, Administrator	1000000008		View
2142421011		2142421011		View
2142421029		2142421029		View
2142421037		2142421037		View
2142420997		2142420997	orapan@example.com	View
2142420963	MBL Test 2	2142420963		View
2142421052		2142421052	noel@example.com	View
				

6. Click the disk icon at the bottom of the page to download a CSV.

Note: If you need more information than provided in the download you should consider extracting the data required from Smile using Smile's public schema.

A CSV file is downloaded to your default directory.

7. Compare the Smile CSV data against your Salesforce account data:

Option	Description
Manually	Load a Smile account USN in Salesforce and compare the email address on the CSV.
By third party application	Use a tool, such as Data Loader for Salesforce. Search for data loading tools on Salesforce AppExchange

Support

Inomial Pty Ltd

Address

Suite 801
620 Bourke Street
Melbourne VIC 3000
Australia

Phone

+61 3 9663 3554

Fax

+61 3 8677 1190

Email

support@inomial.com

Web

www.inomial.com