TrustRadius

TrustRadius Connector Installation **and Configuration Guide**

v1.2 Published February 22, 2021

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Document Overview

The purpose of this document is to provide an outline of the steps required to install the TrustRadius Connector from the Salesforce AppExchange.

The typical installation and configuration should take no more than 45 minutes. If you encounter any problems during installation or configuration of the app, please reach out to product@trustradius.com and someone from TrustRadius will be glad to assist.

The TrustRadius Connector was designed for Salesforce Lightning. All screenshots and instructions in this guide refer specifically to Lightning. If you wish to install the TrustRadius Connector for Salesforce Classic and have any questions, please contact product@trustradius.com.

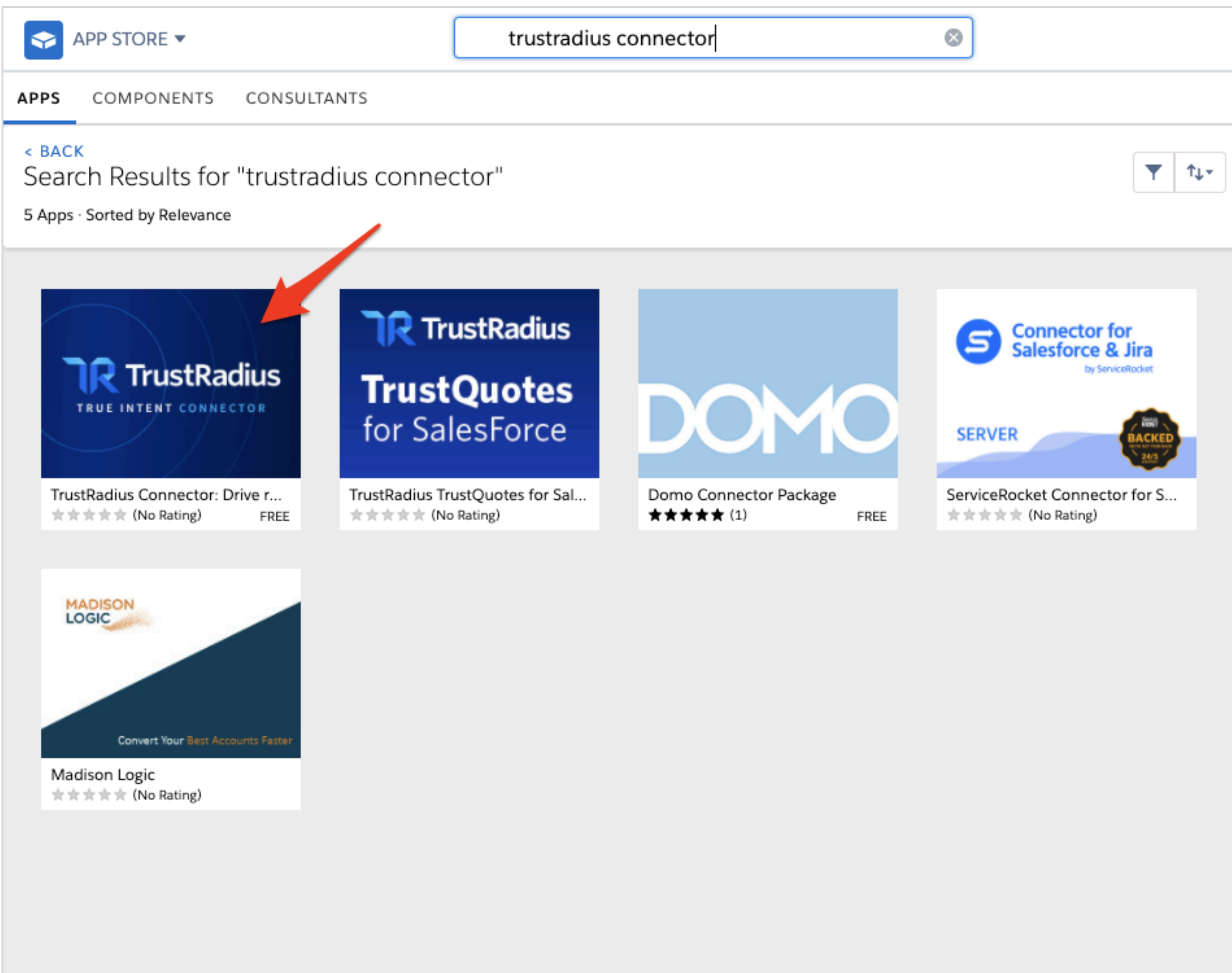
Guidelines and Prerequisites

- The TrustRadius Connector is free to install. To configure the application to begin receiving data you will need your company's API key. Please contact your CSM to obtain your API key. If you have any other questions please contact product@trustradius.com.
- Prior to installing the application, ensure that you have at least one Page Layout and one Lightning Record Page set up for the Account object. This might only be applicable if you are installing in a sandbox org first. If you are installing in a production environment this should not be relevant.
- We strongly recommend using an Integration User to install and configure the managed package, in order to keep the integration stable and to avoid disruptions should an employee who configures the application leave your organization. See this article from Salesforce on the value of having and using an integration user.

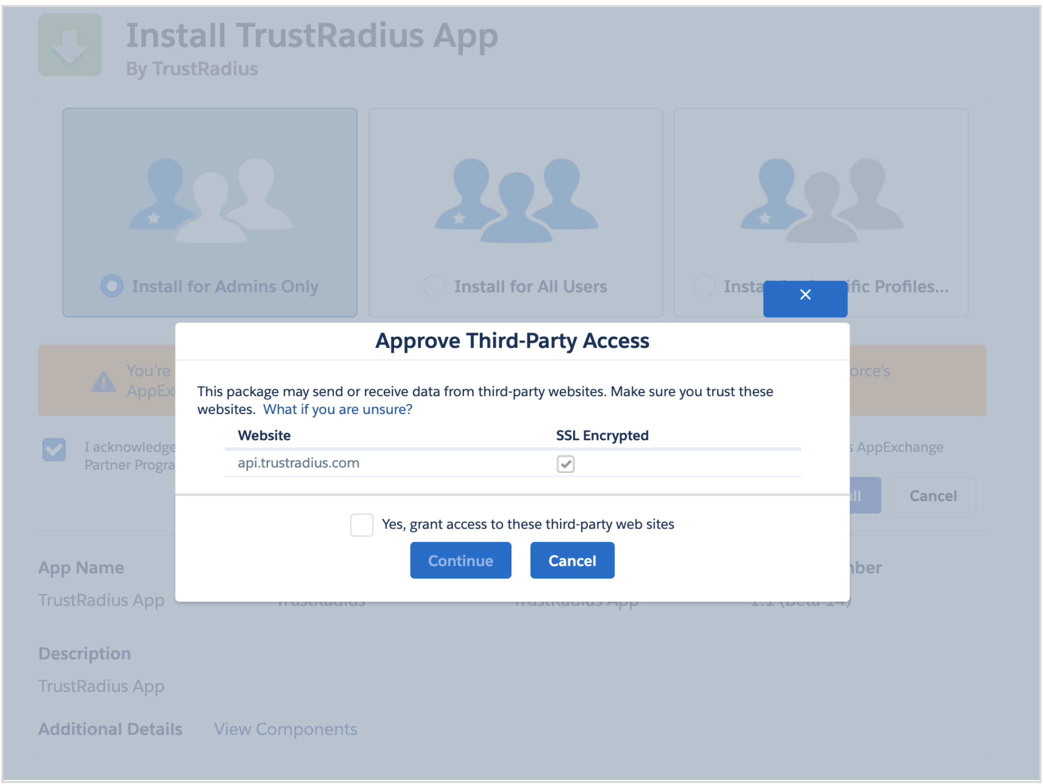
Step 1: Install the TrustRadius Connector

Follow these steps to install the TrustRadius Connector from the AppExchange:

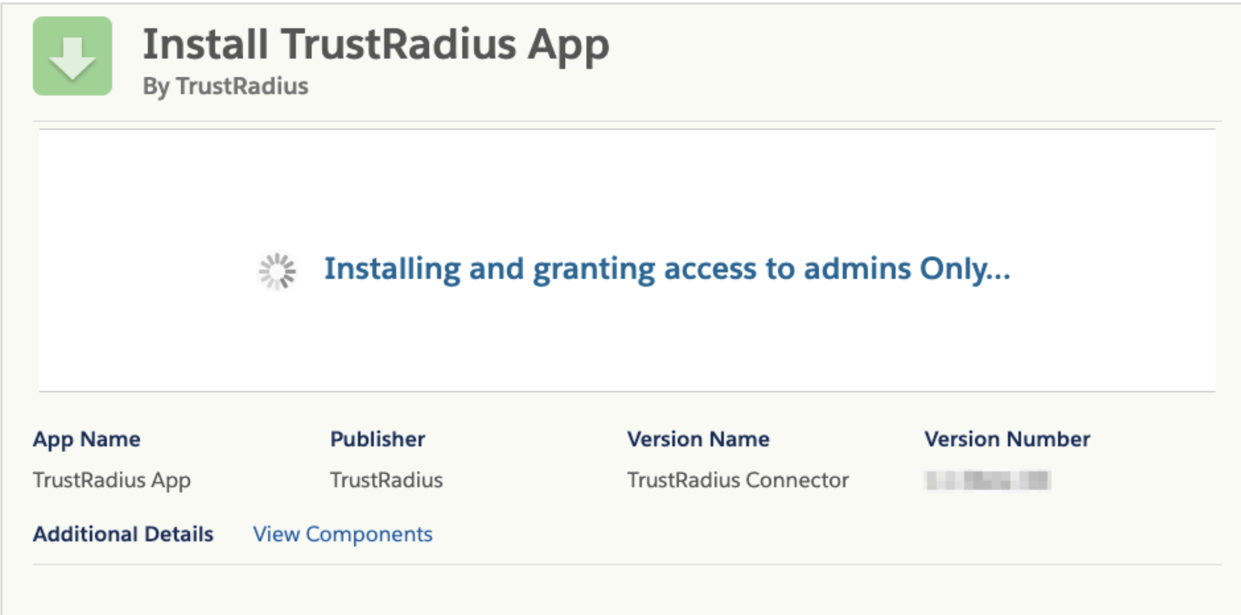
1. In Salesforce, navigate to the Setup page and search for "AppExchange Marketplace" in the search box in the upper left hand corner. Note, as referenced earlier in this document, we strongly recommend using an Integration User to install and configure the managed package, in order to keep the integration stable and to avoid disruptions should an employee who configures the application leave your organization. See this [article from Salesforce on the value of having and using an integration user.]()
2. Open the AppExchange App Store and search for "TrustRadius Connector" to find the application and begin the installation process.



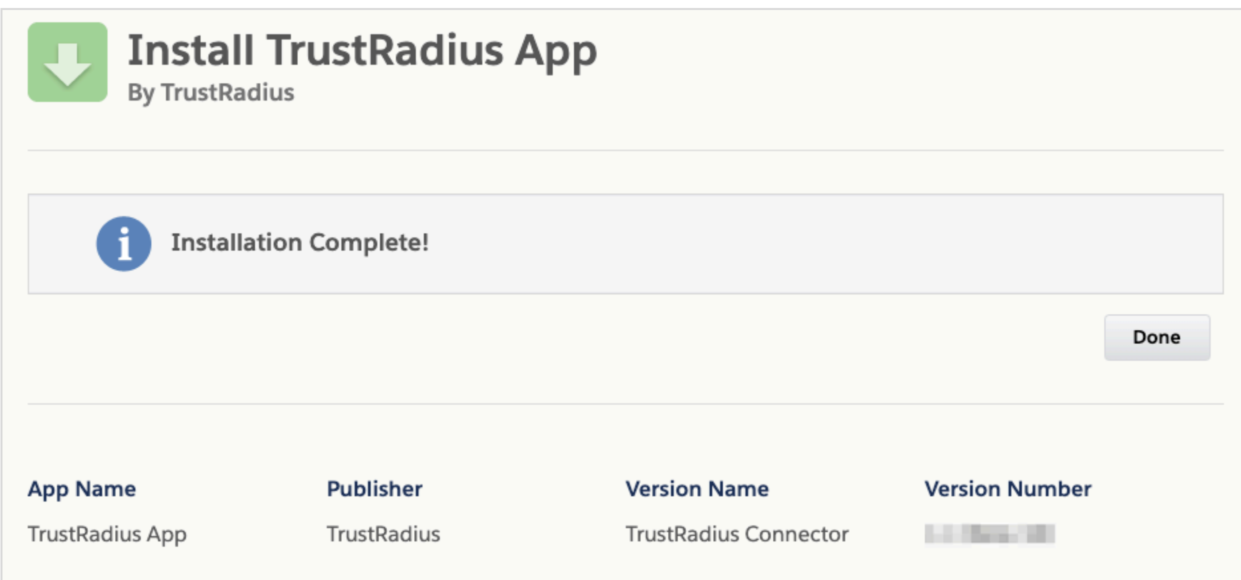
3. Select “Install for Admins Only”.
4. Click “Install”.
5. Check the box to grant third-party access to TrustRadius and select “Continue”.



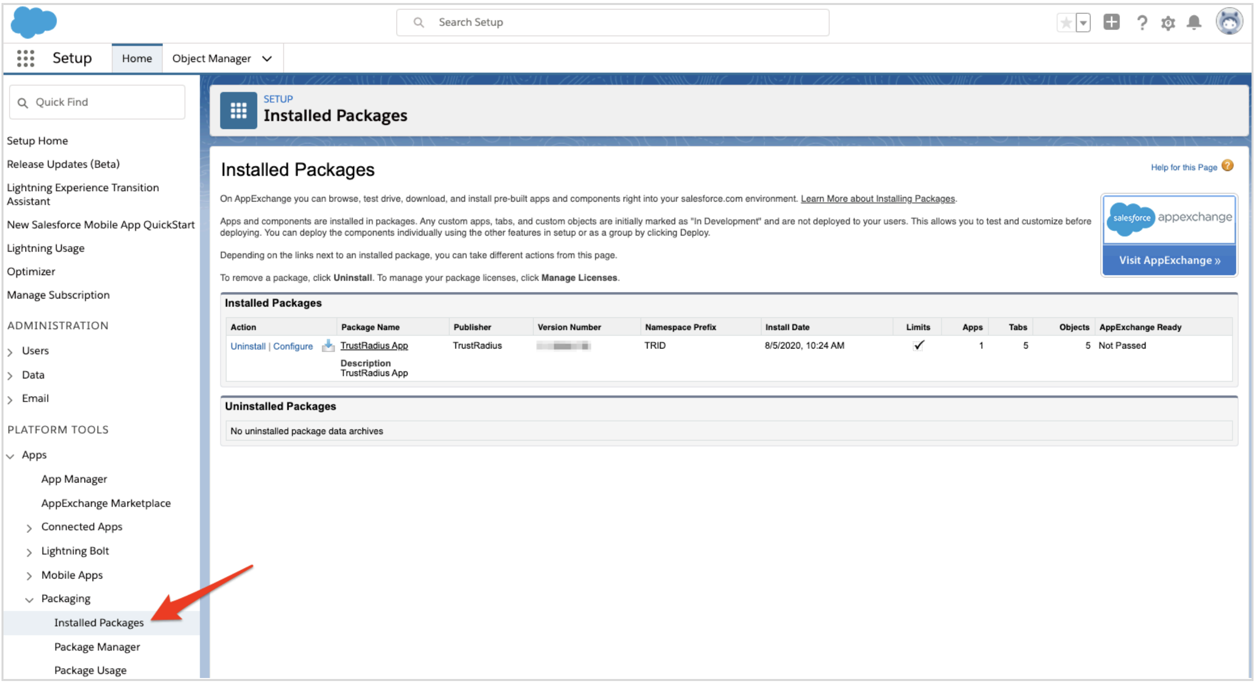
6. Installing the package may take several minutes to complete. If the installation is taking longer than normal, a message will be displayed notifying the user that an email will be sent when the installation is complete.



7. Once installation is complete, click “Done”.



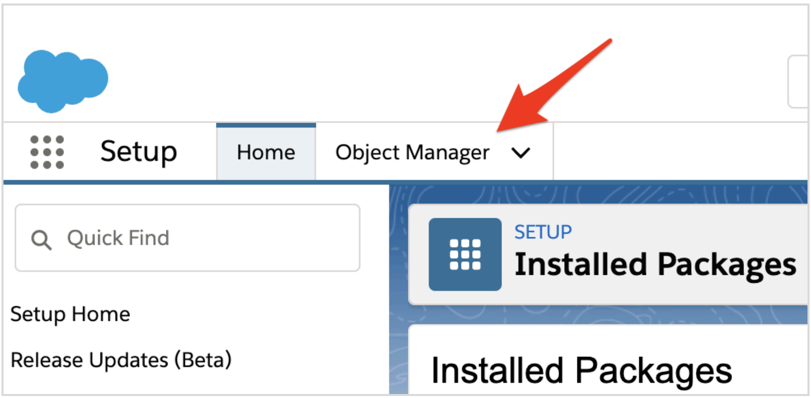
8. The installation process is complete. The installed package will be displayed under Platform Tools → Apps → Packaging → Installed Packages.



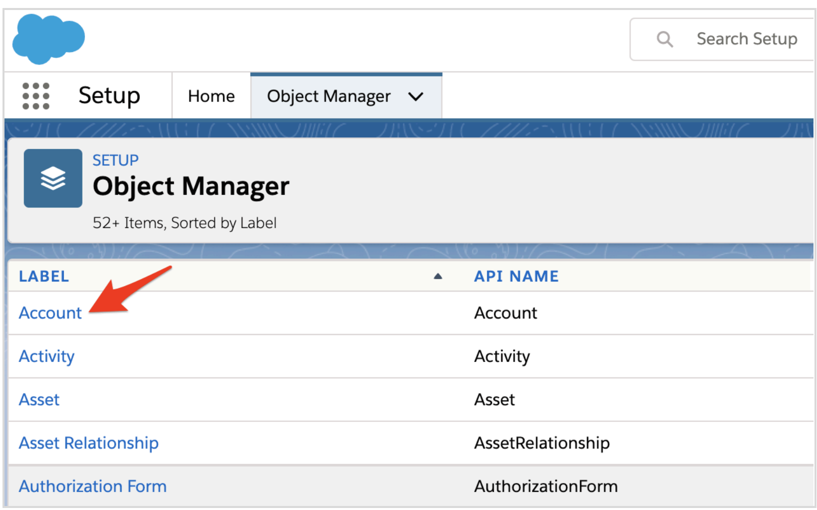
9. Before configuring the application, complete **Steps 2-5**.

Step 2: Configure the Account Page Layout

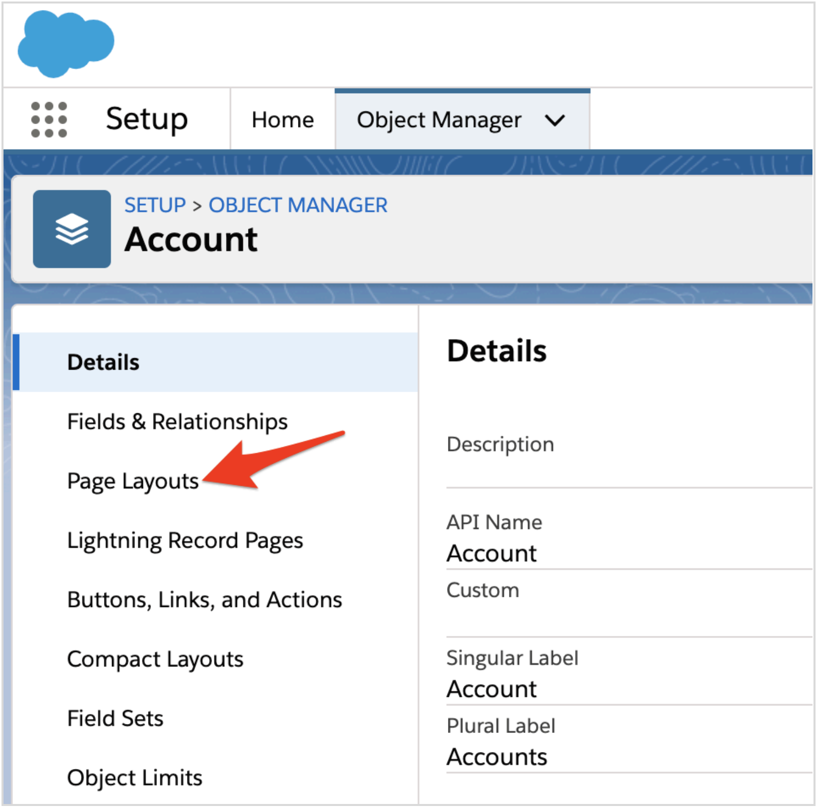
1. From the Setup page, click "Object Manager".



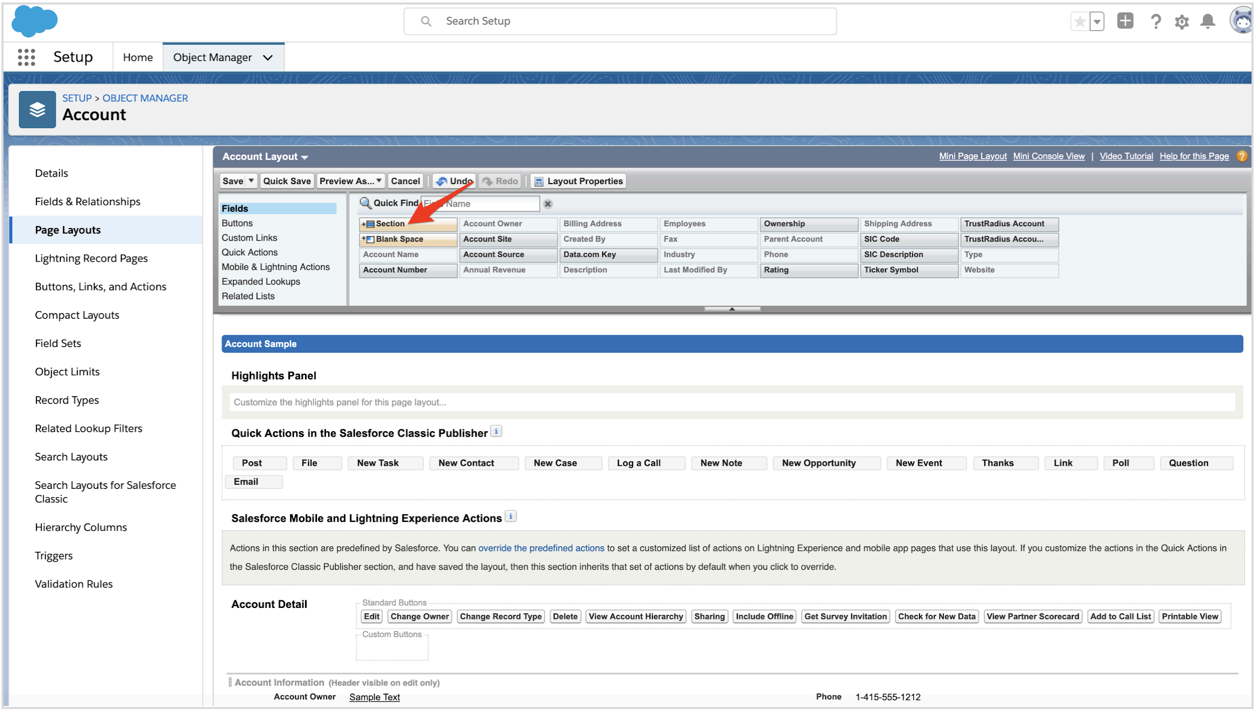
2. Click "Account".



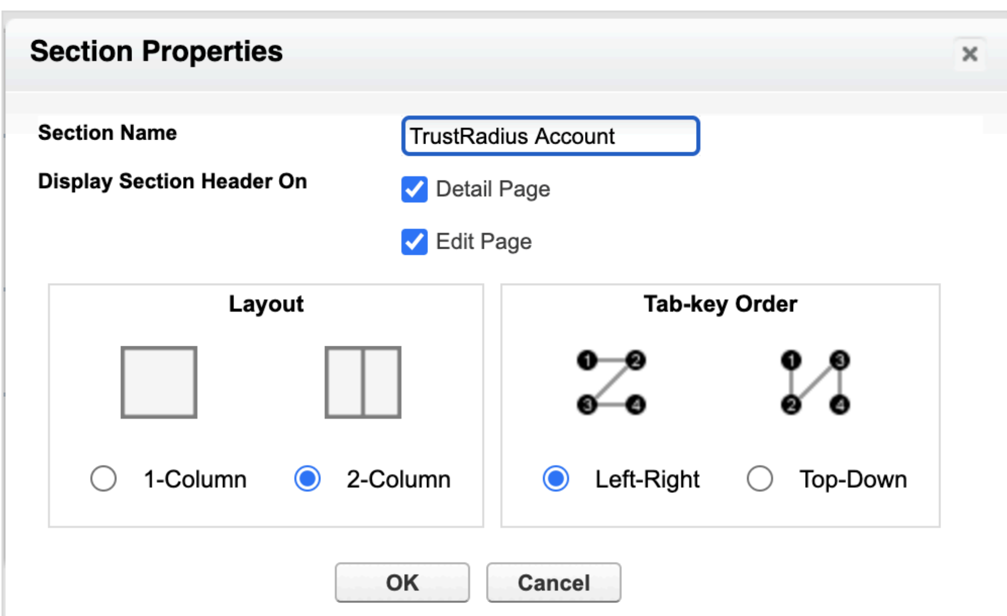
3. Click “Page Layouts”.



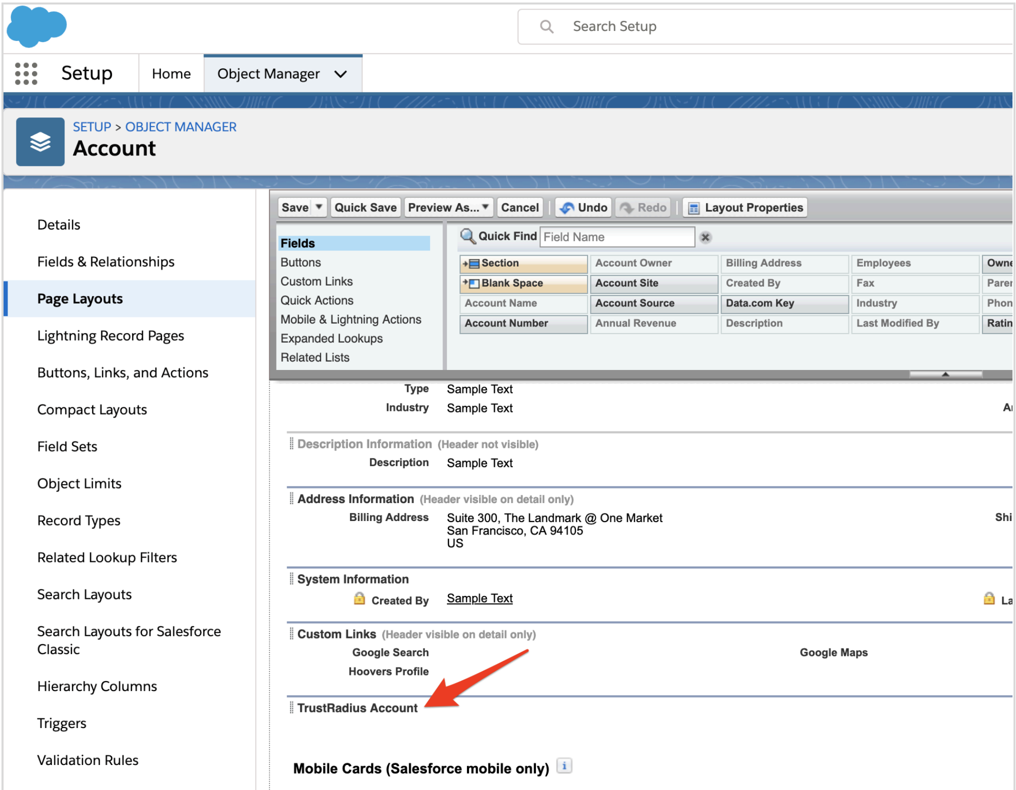
4. Click the Page Layout(s) used for displaying Salesforce Accounts to members of your organization.
5. Create a new section on the Account Page Layout by dragging the ‘Section’ field to the desired location in the page layout.



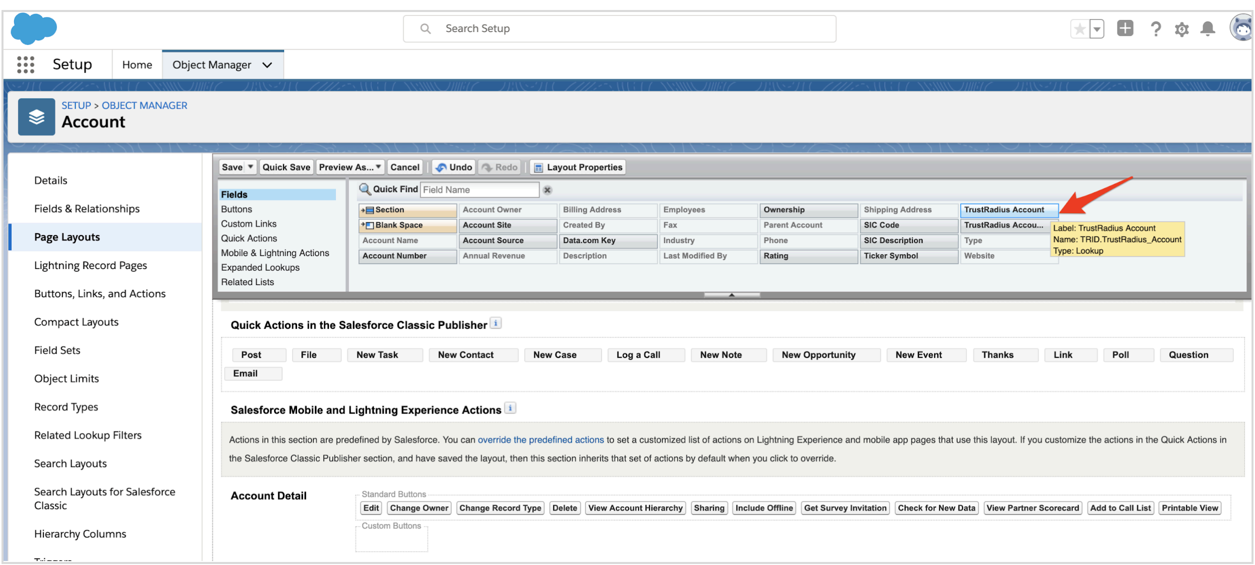
6. Name the section “TrustRadius Account” and click “OK”.

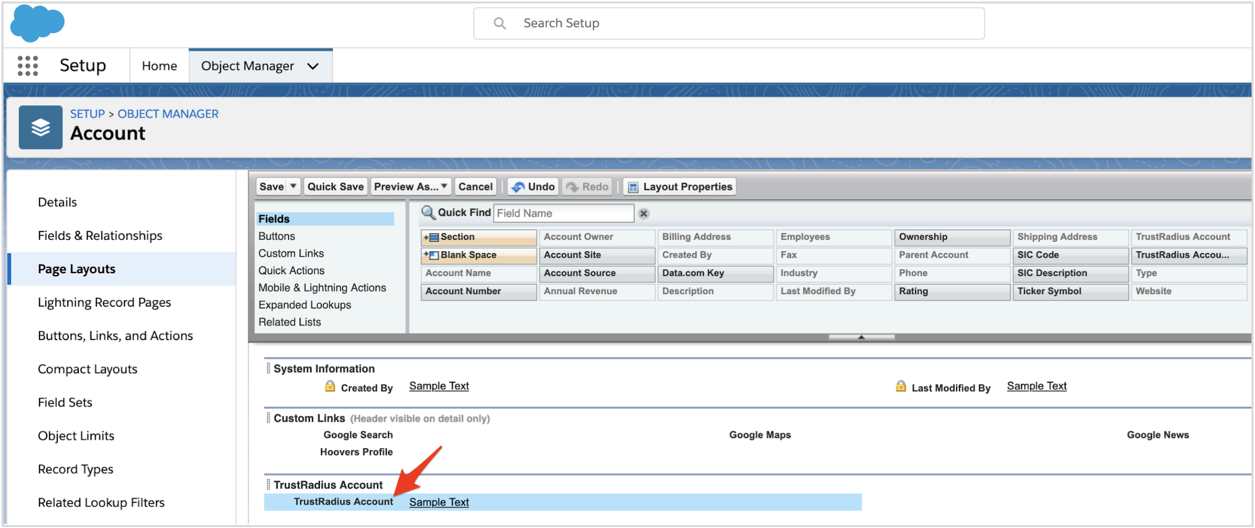


7. The section will be blank on the Account Page Layout.

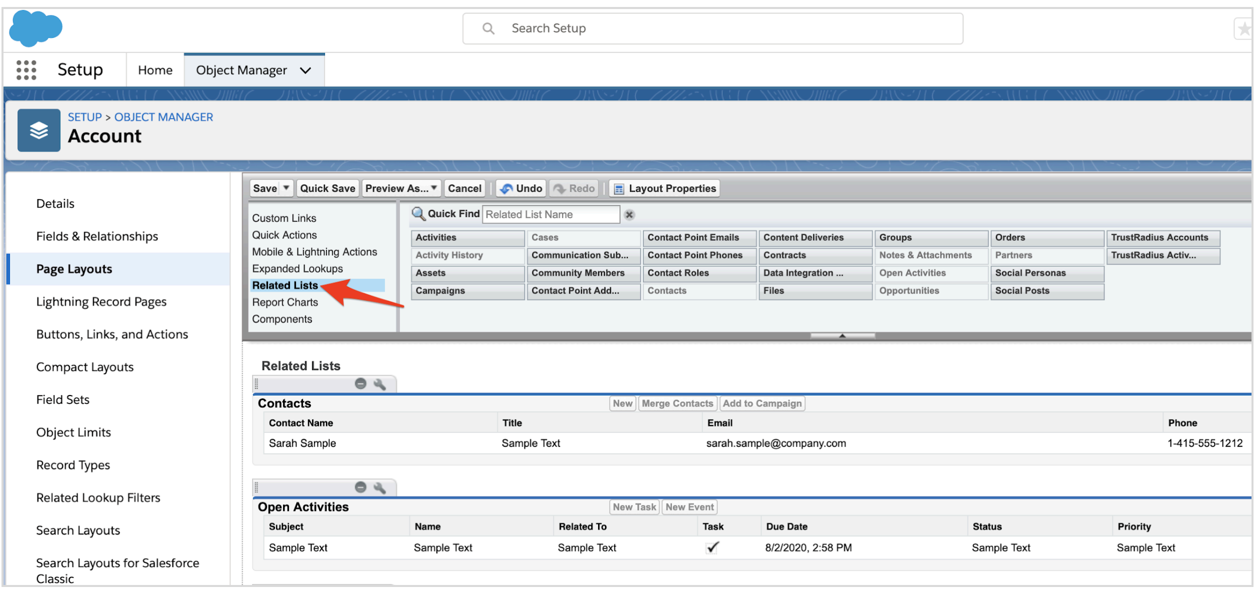


8. Select and drag the lookup field “TrustRadius Account” to the “TrustRadius Account” Section created in steps 5-7.

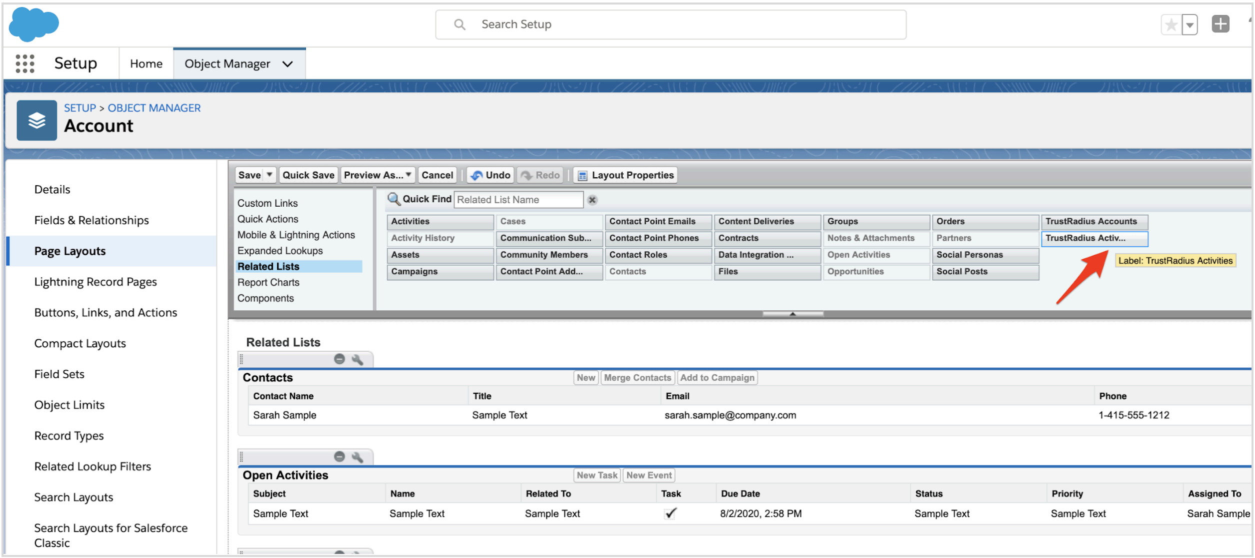


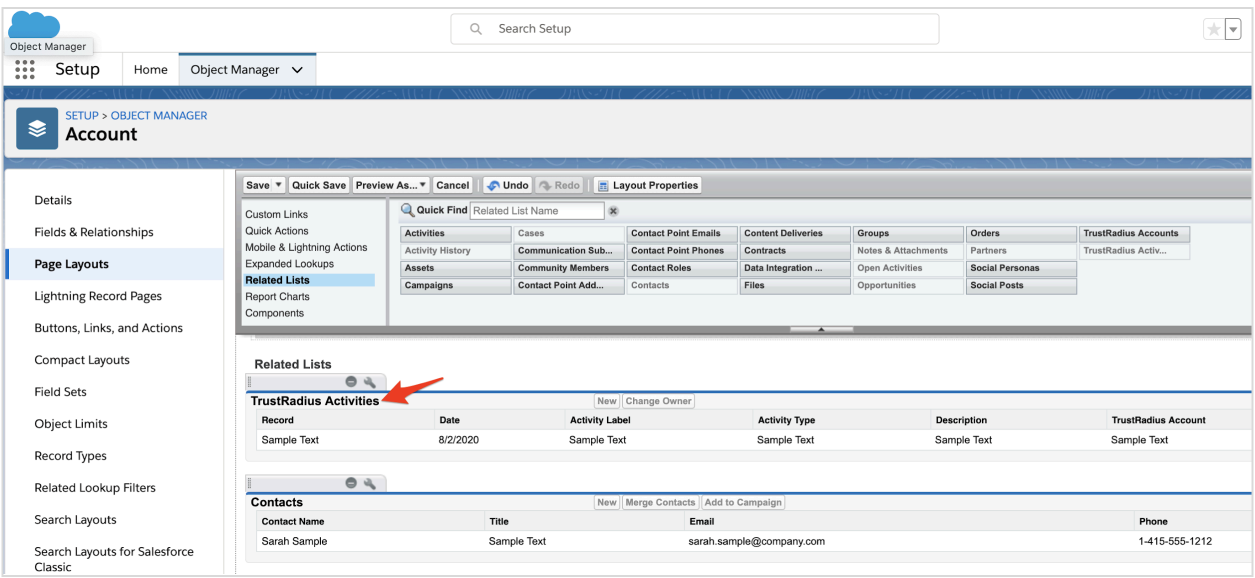


9. Select “Related Lists” in the Account Layout section.

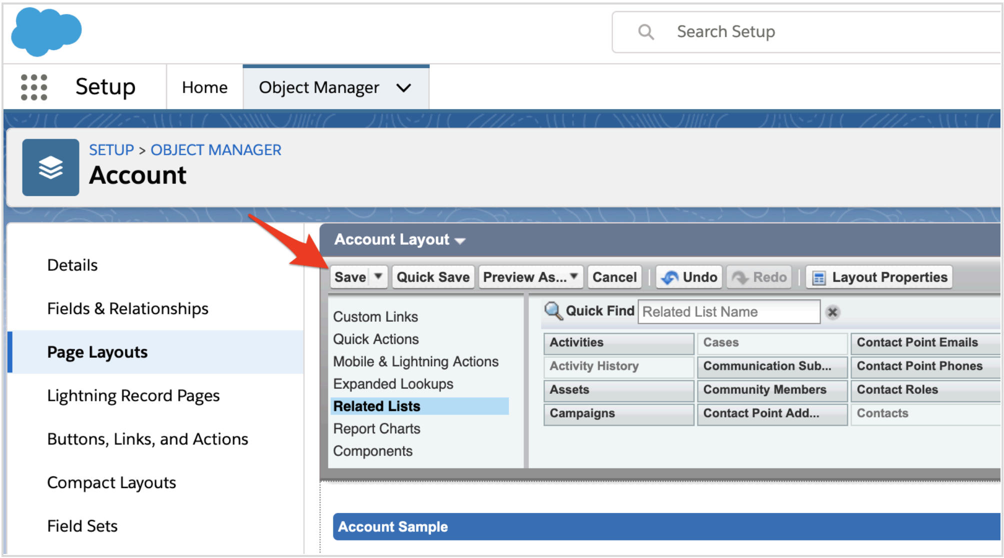


10. Select and drag the "TrustRadius Activities" Related List to the page.





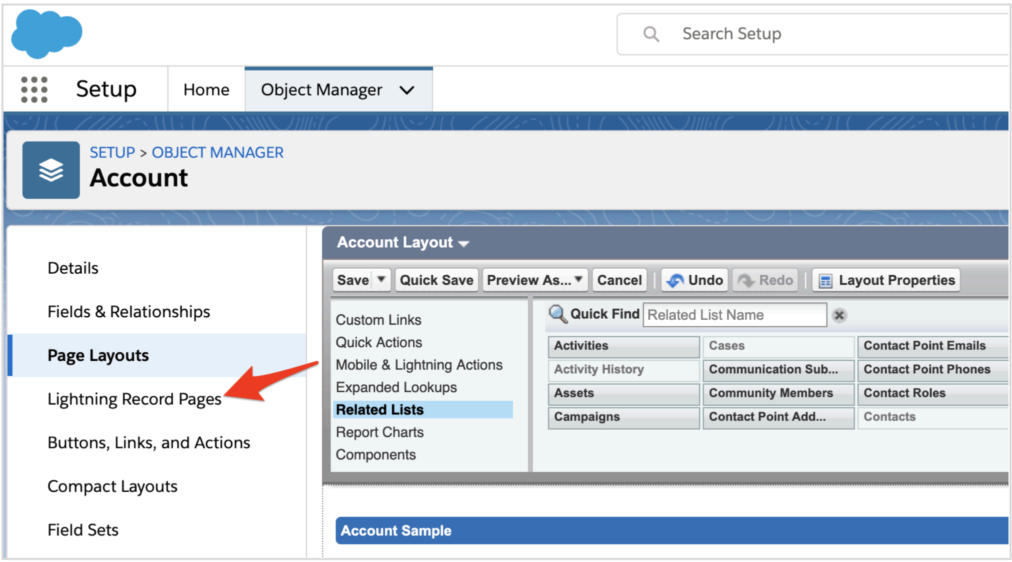
11. Click "Save".



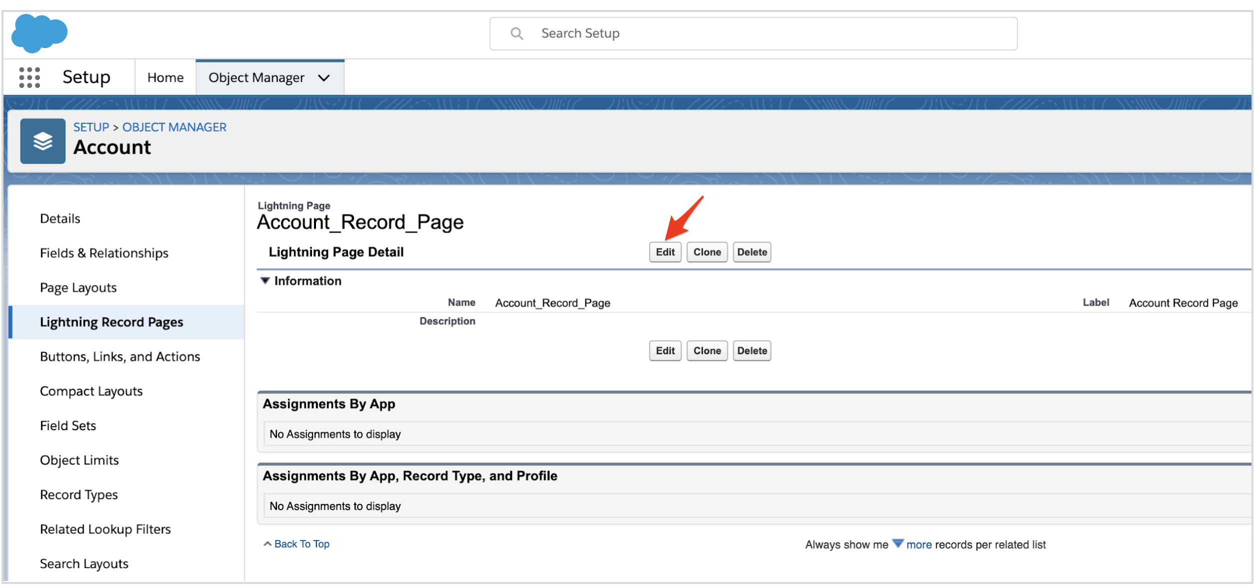
12. Configuring the Account Page Layout is now complete. Next, complete **Step 3: Configuring the Account Lightning Record Page**.

Step 3: Configure the Account Lightning Record Page

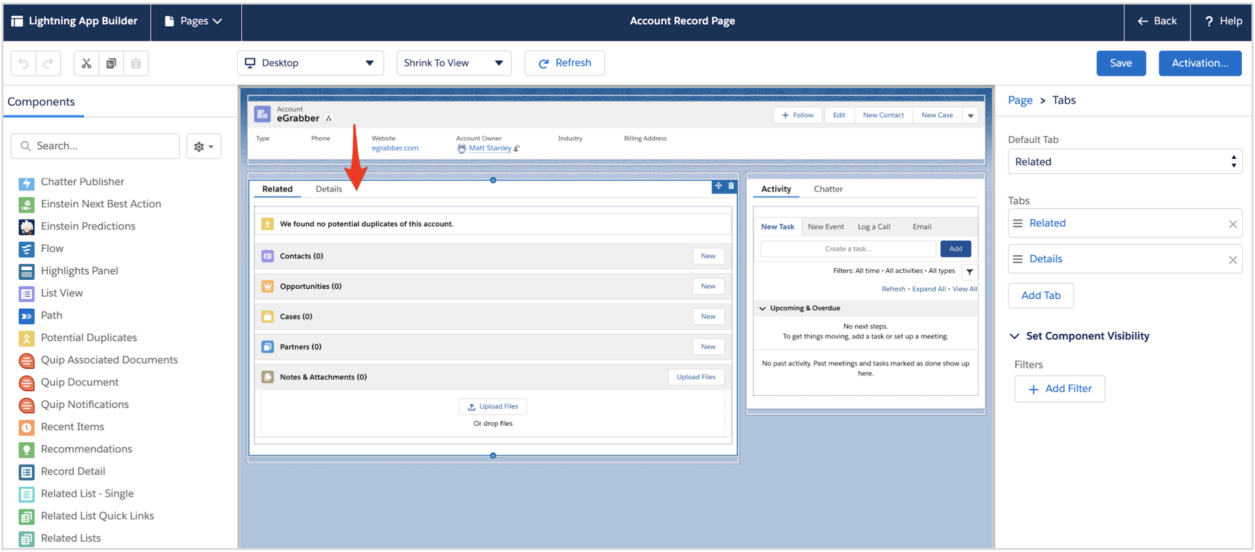
1. From the Setup page, select "Lightning Record Pages".



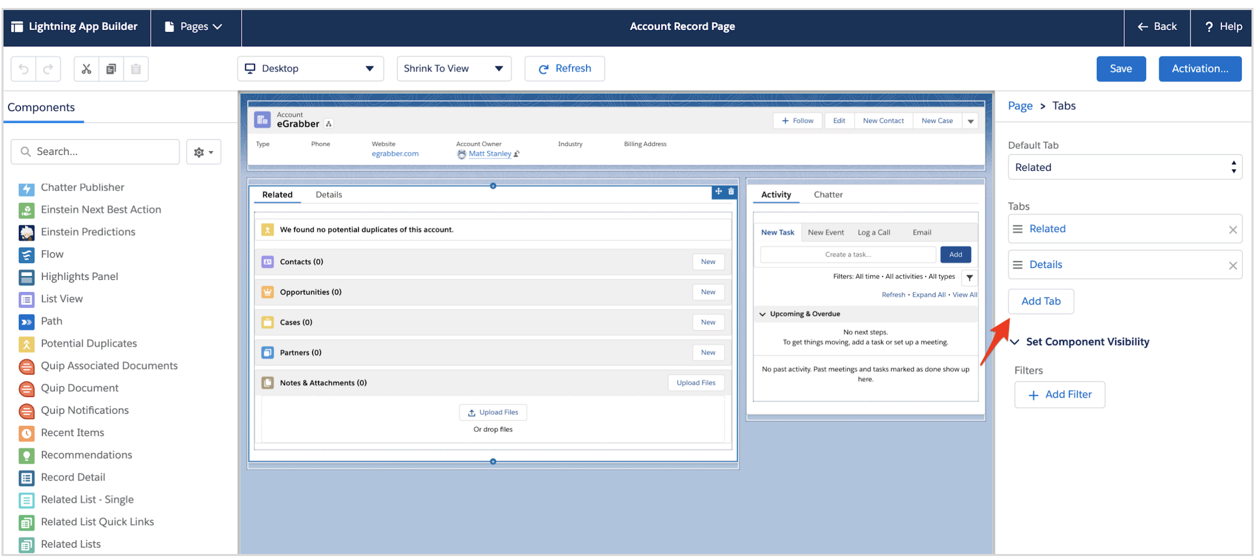
2. Select the Lightning Record Page(s) used for displaying Salesforce Accounts to members of your organization.
3. Click "Edit".



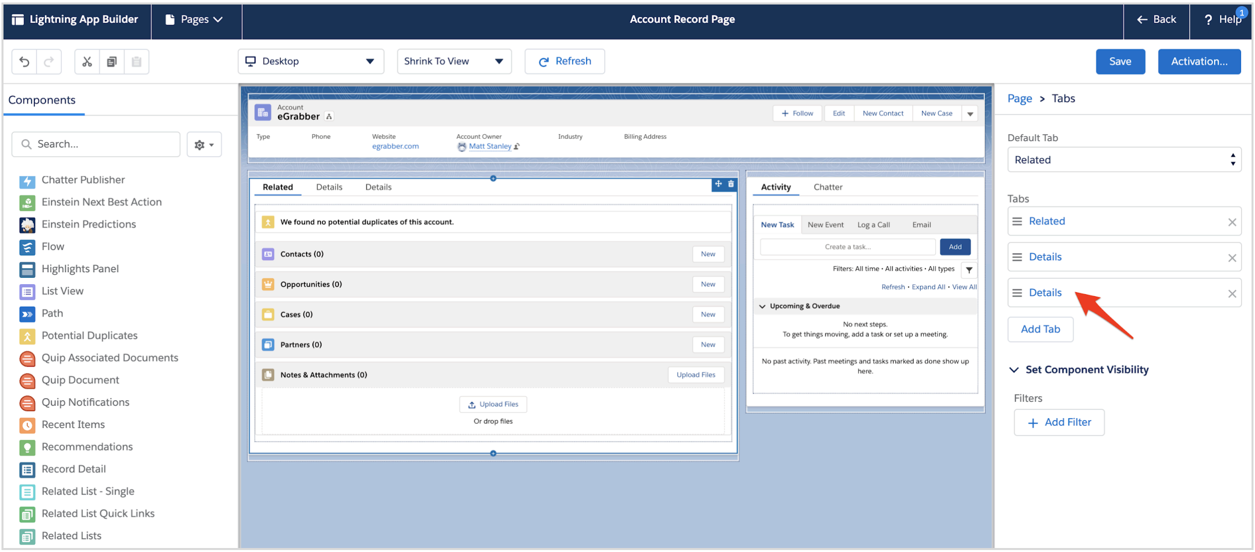
4. Select the Tabs section of the page.



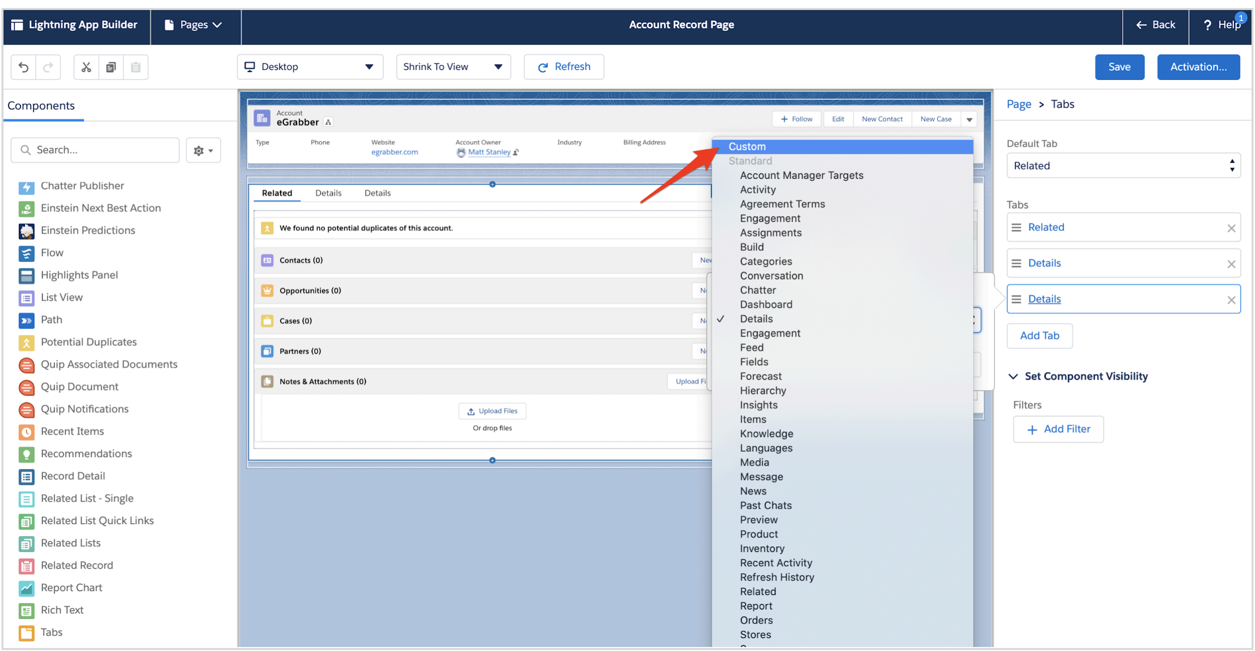
5. Click “Add Tab”.



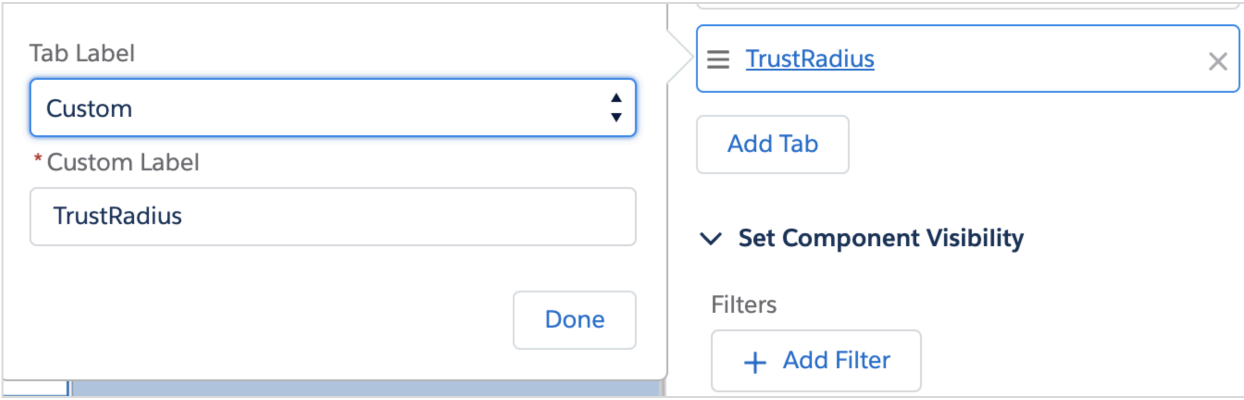
6. Select inside the newly created tab.



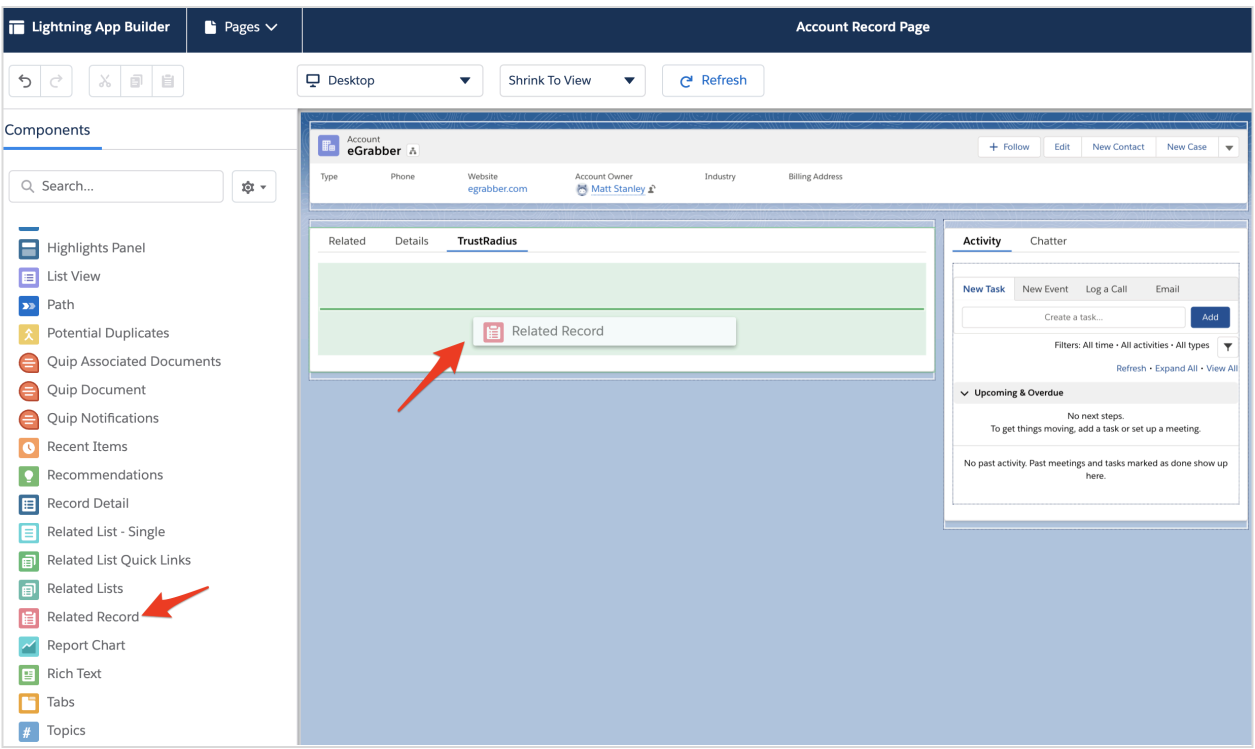
7. Select “Custom” from the top of the dropdown menu.



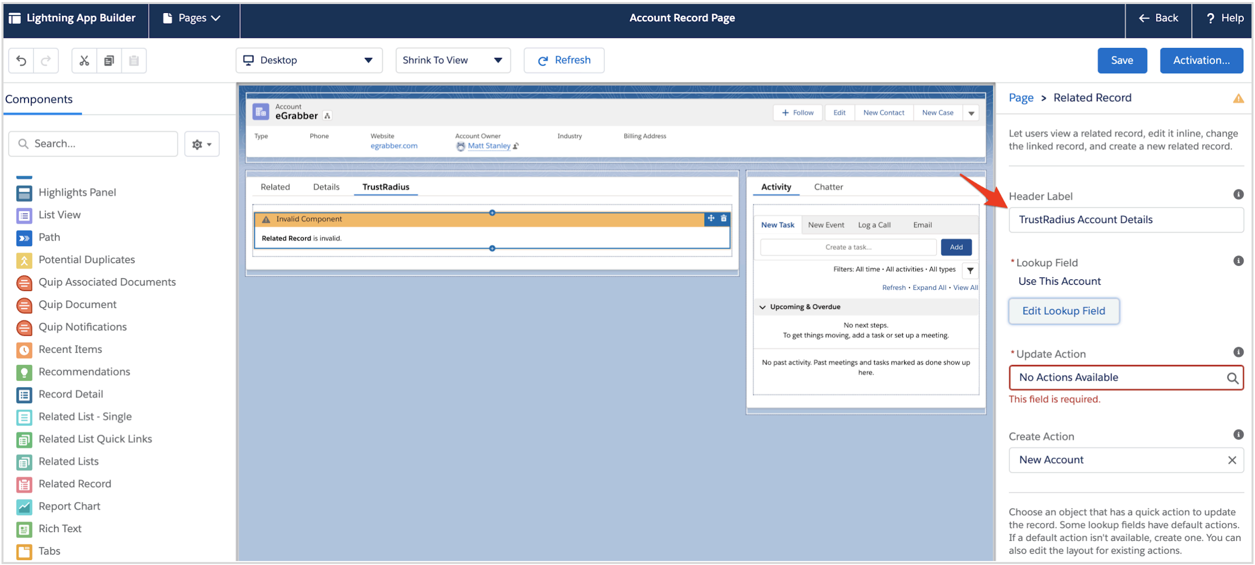
8. In the field Custom Label, name the tab “TrustRadius” and click “Done”.



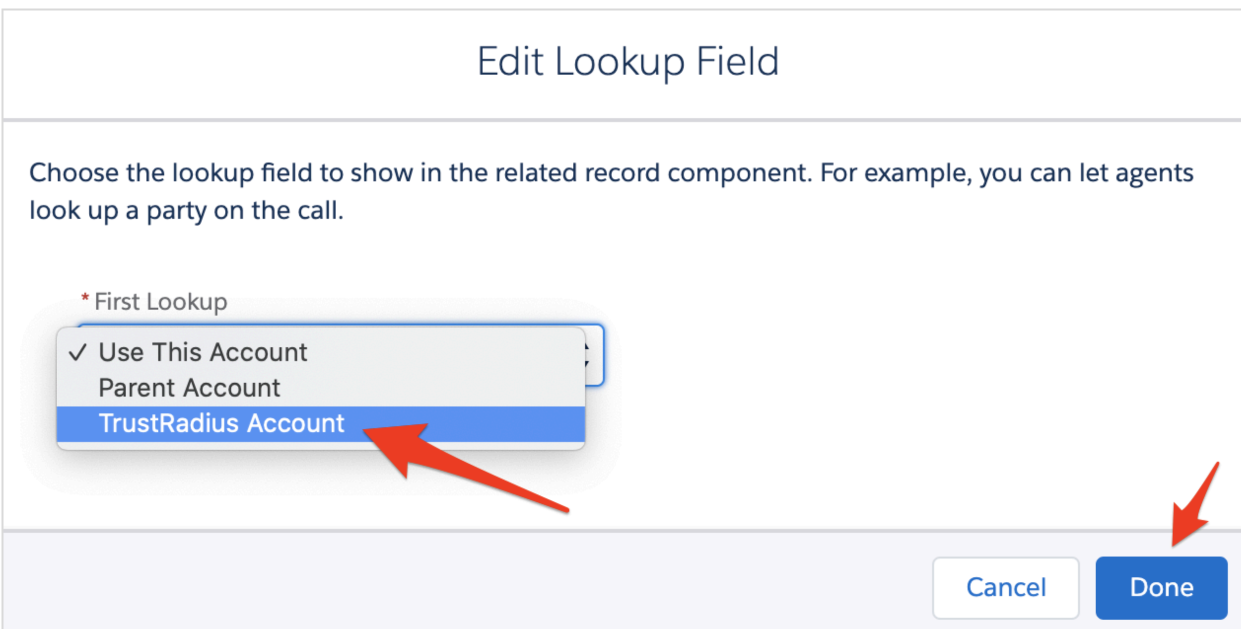
9. From the Standard Components list, drag a **Related Record** Component to the “TrustRadius” tab.

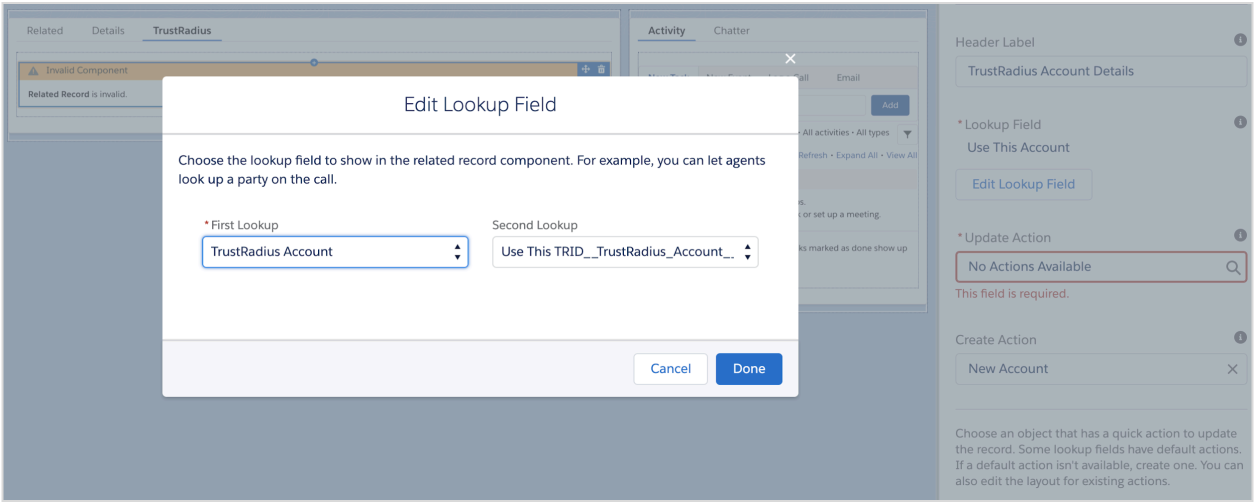


10. In the Header Label field, name the Related Record “TrustRadius Account Details”.

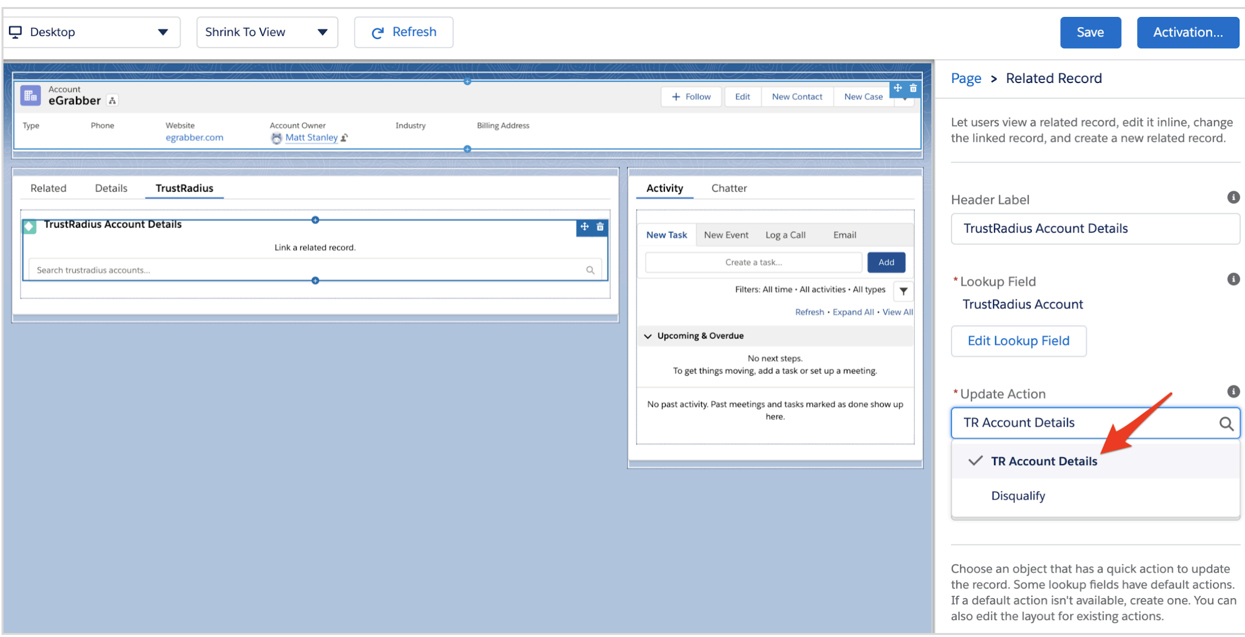


11. Select “Edit Lookup Field” and select “TrustRadius Account” from the dropdown menu. Click “Done”.

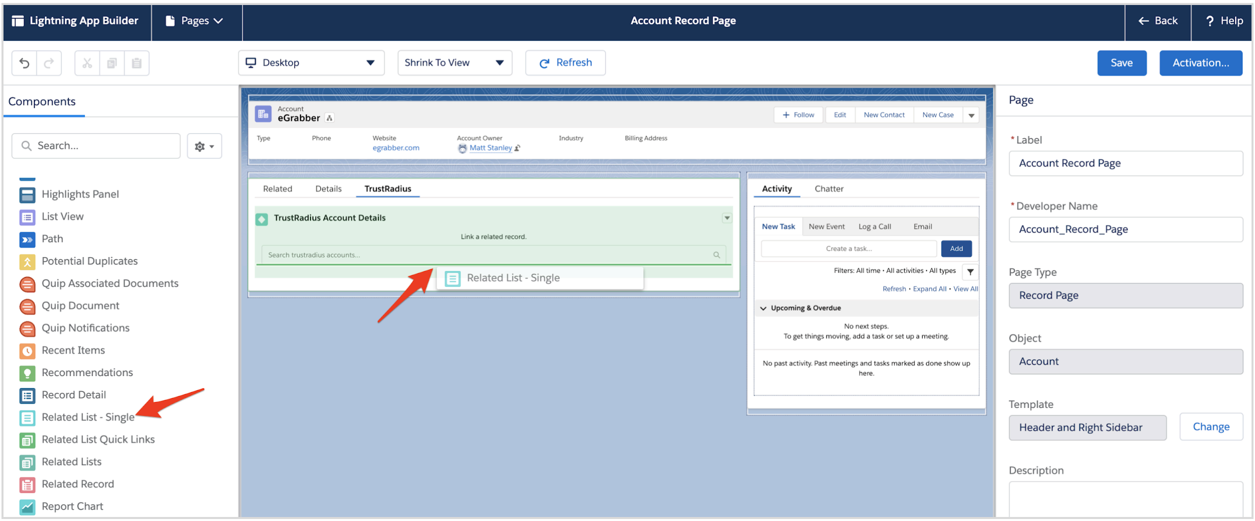




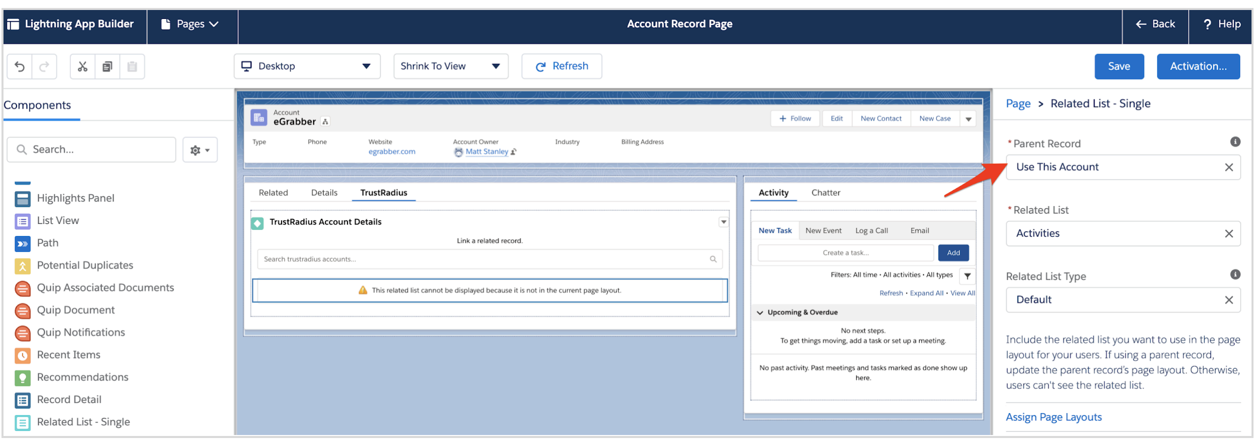
12. In the “Update Action” field select “TR Account Details”.



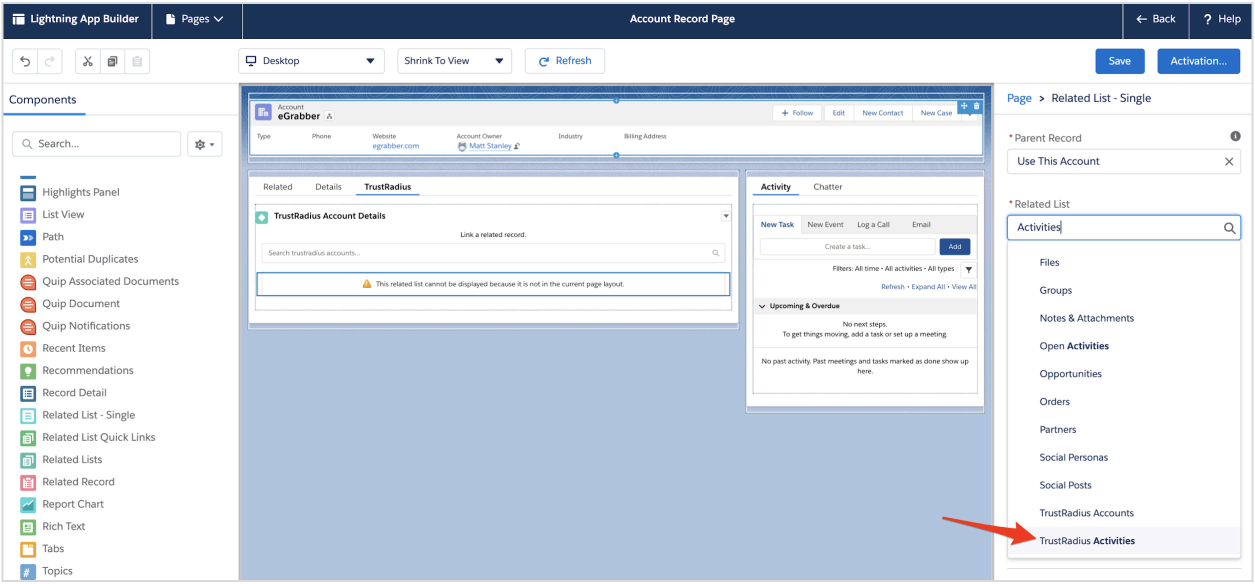
13. From the Standard Components list, drag a **Related List - Single** to the "TrustRadius" tab and place it below the "TrustRadius Account Details" Related Record Component.



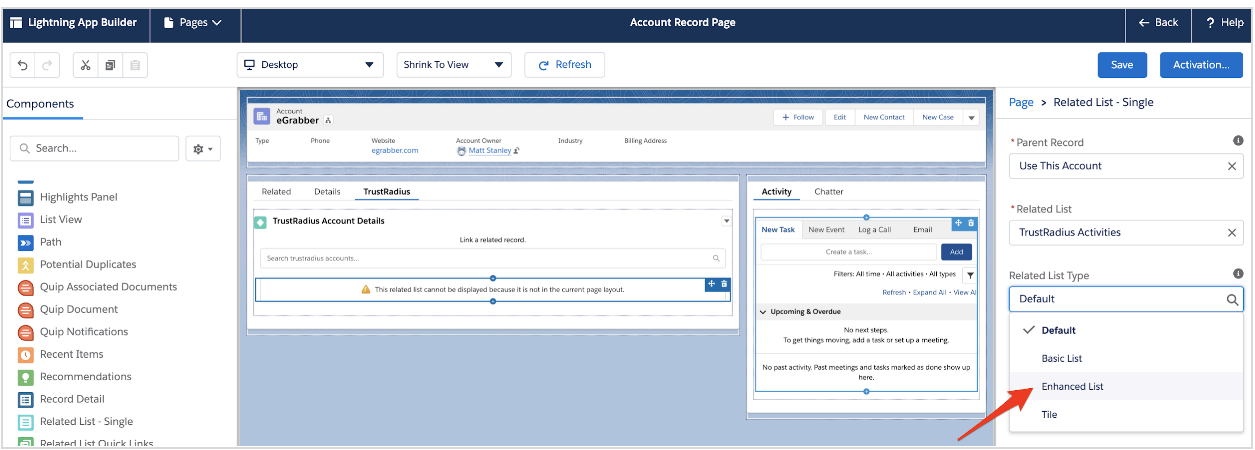
14. Set the Parent Record to "Use This Account".



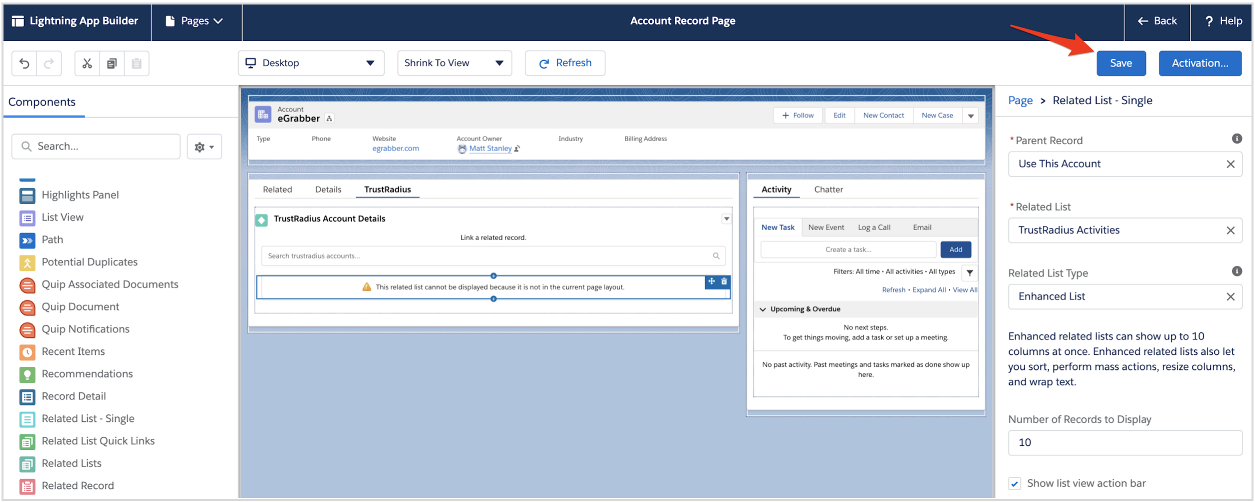
15. Select “TrustRadius Activities” from the Related List dropdown menu.



16. Select “Enhanced List” from the Related List Type dropdown menu.



17. Click “Save”.

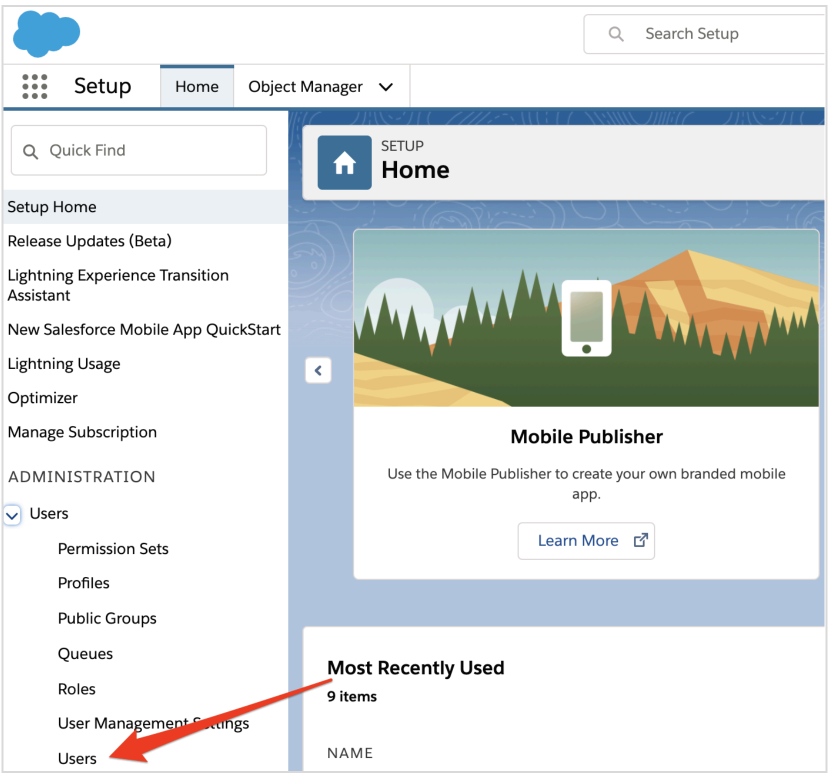


18. Configuring the Lightning Record Page is now complete. Next, complete **Step 4: Setting up User Permissions.** User permissions can be set at the individual user level, or can be added to multiple users simultaneously - see separate instructions below for each use case.

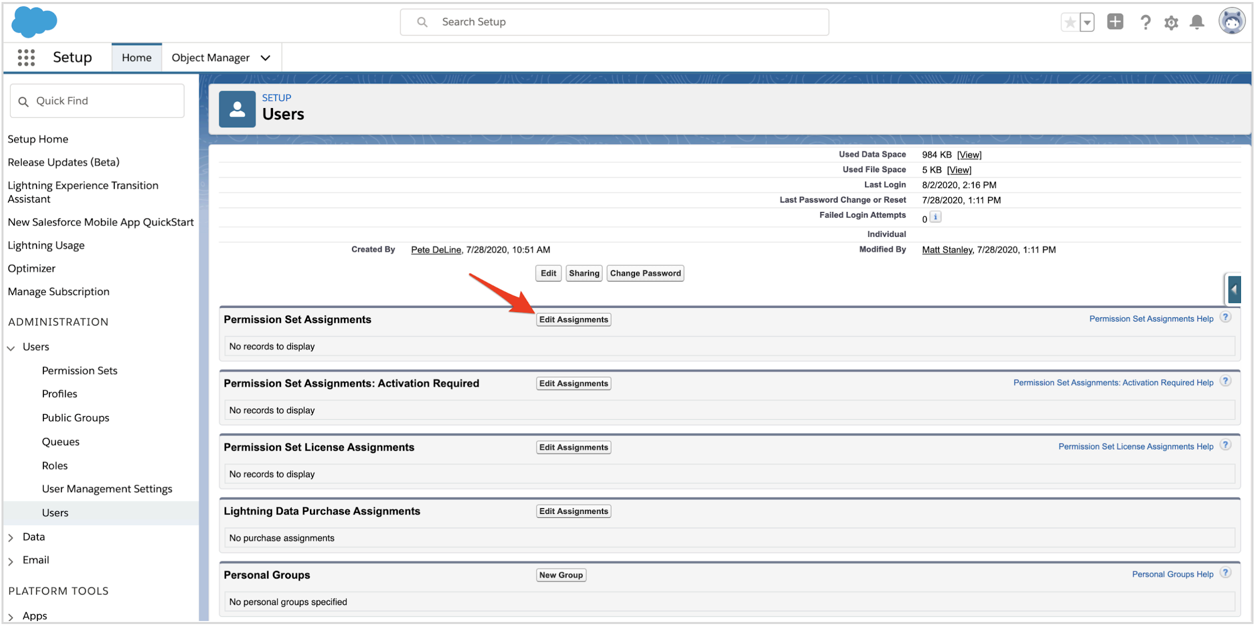
Step 4: Set up User Permissions

Set up User Permissions - Single User

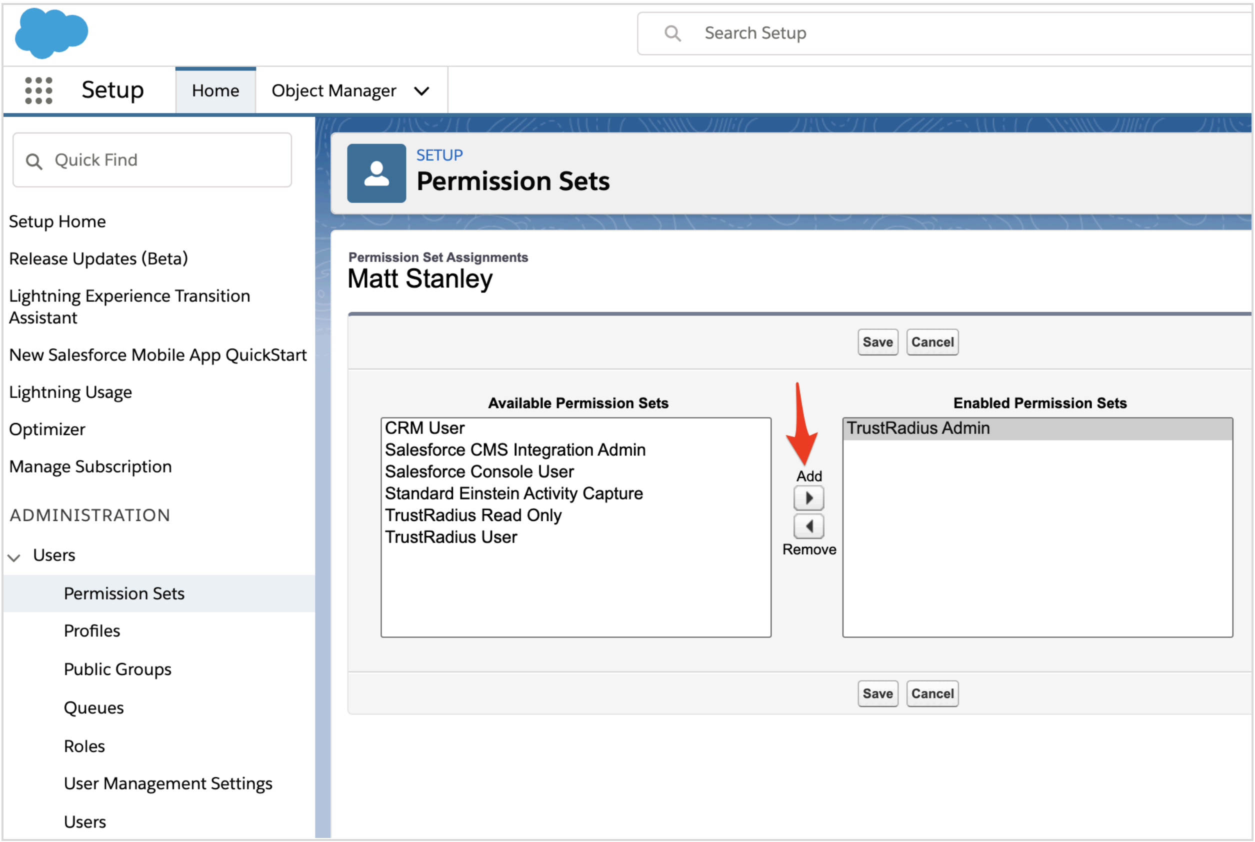
1. From the Setup page, navigate to your organization's Users.



2. Select a User by clicking their name.
3. Scroll down to Permission Set Assignments and click “Edit”.



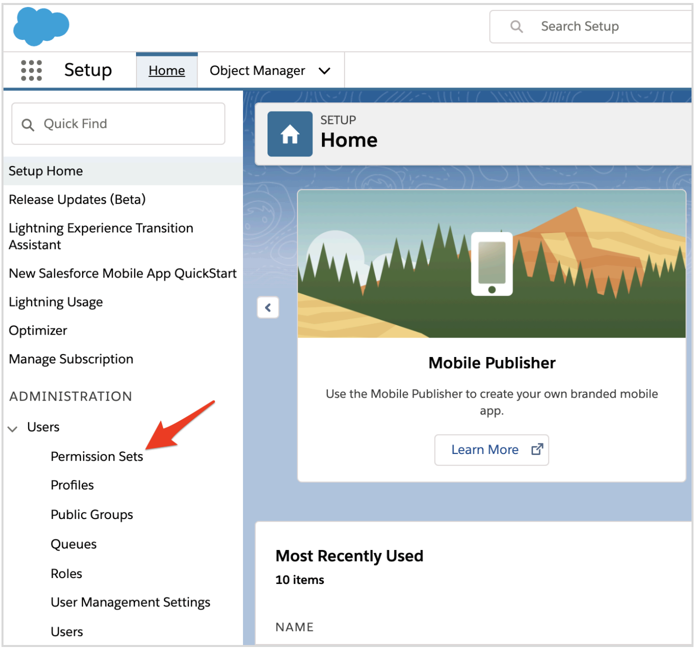
4. Select the appropriate role from the Available Permission Sets and click "Add" to move it to Enabled Permission Sets.
5. Click "Save".



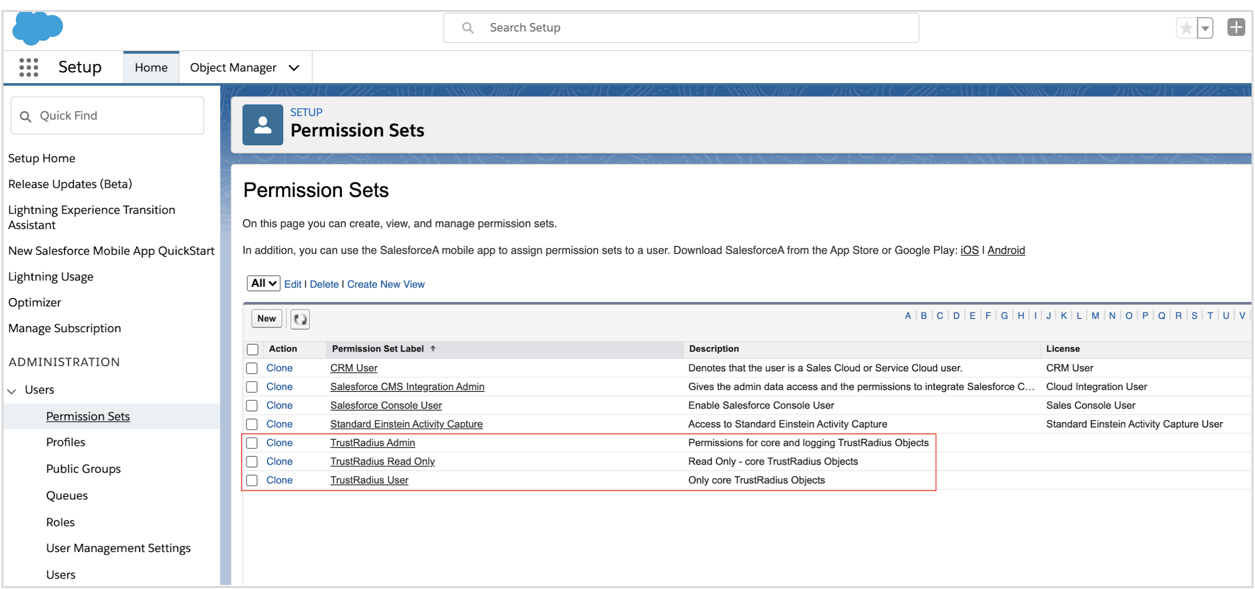
6. Once you have assigned the "TrustRadius Admin" permission set, that user can complete the steps in **Configuring the TrustRadius App.**

Set up User Permissions - Multiple Users

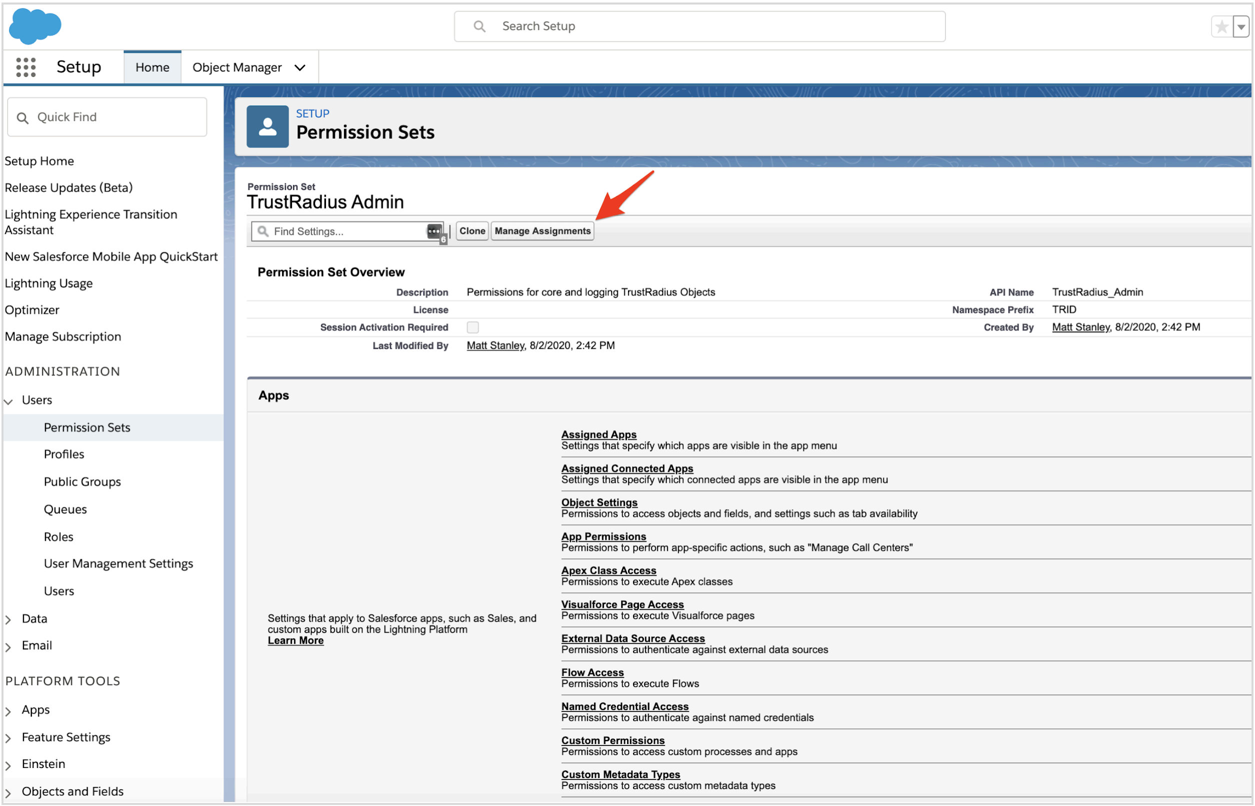
1. From the Setup page, navigate to Permission Sets for your organization's Users.



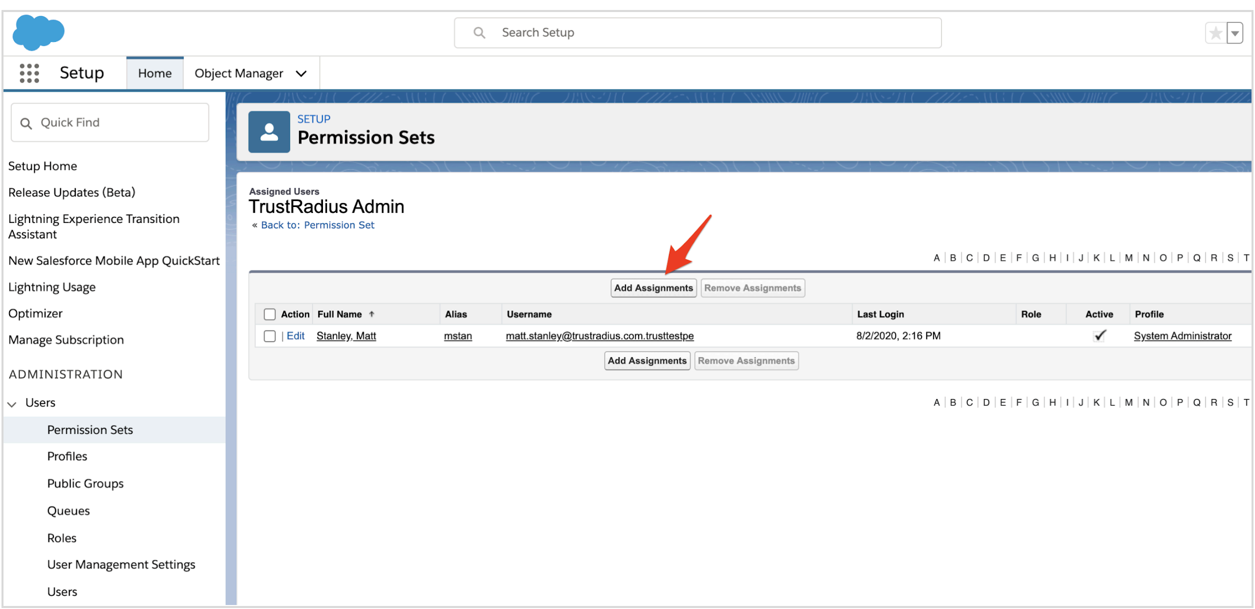
2. Select a Permission Set.



3. Click “Manage Assignments”.



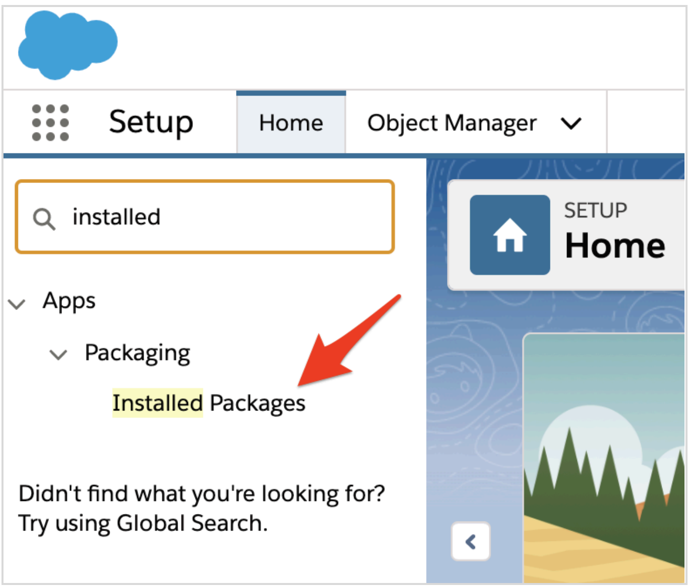
4. Click “Add Assignments”.



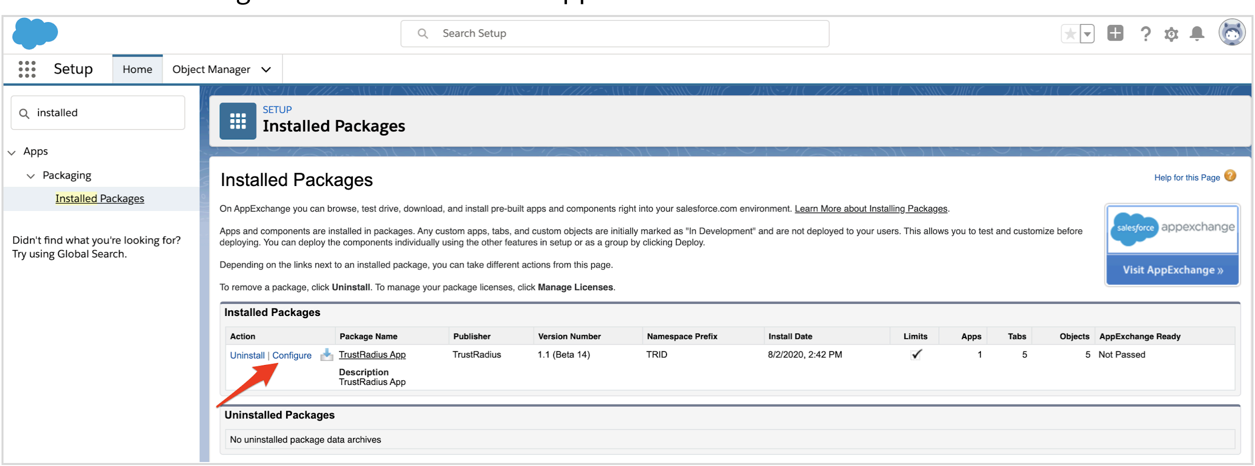
5. Select the Users in your organization to assign the permission and click “Assign”.

Step 5: Configure the TrustRadius Connector

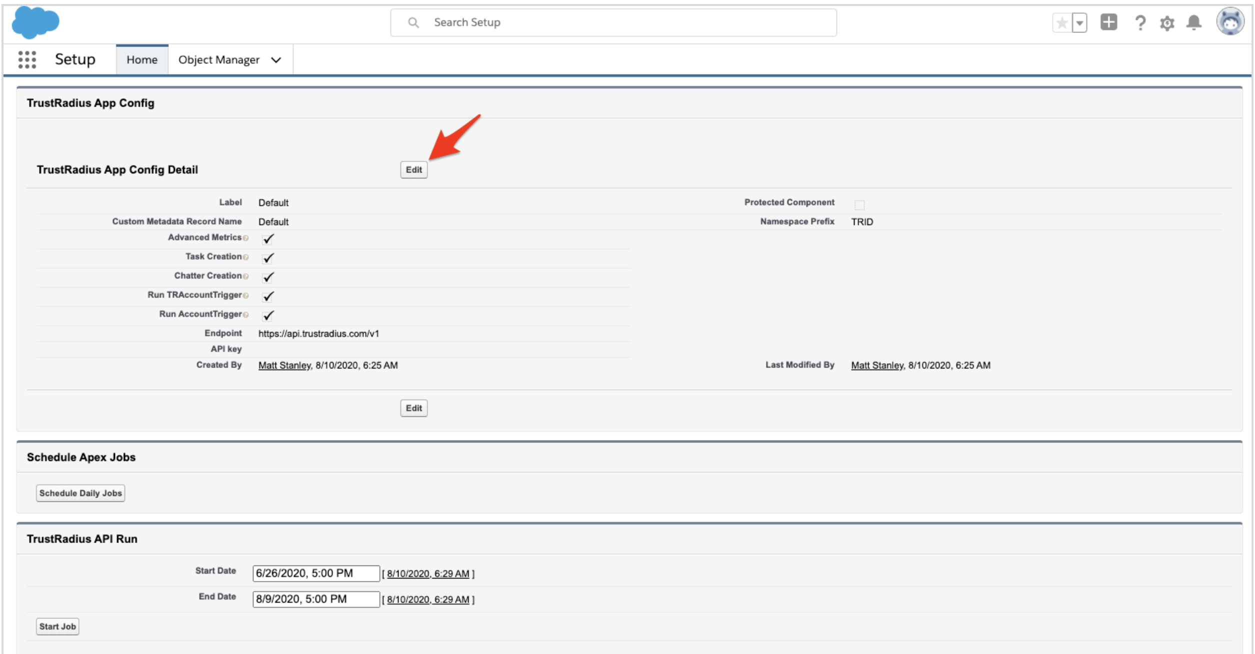
1. From the Setup page, navigate to your organization's Installed Packages. Note, as referenced earlier in this document, we strongly recommend using an Integration User to install and configure the managed package, in order to keep the integration stable and to avoid disruptions should an employee who configures the application leave your organization. See this [article from Salesforce on the value of having and using an integration user.]()



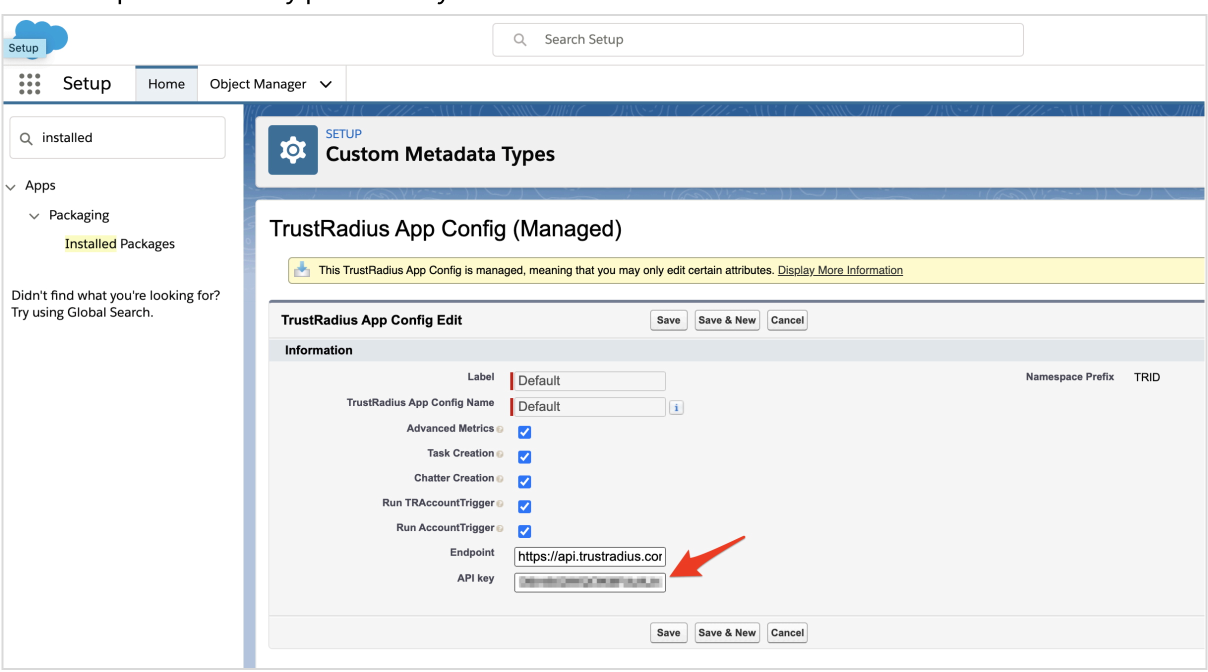
2. Click "Configure" for the TrustRadius App.



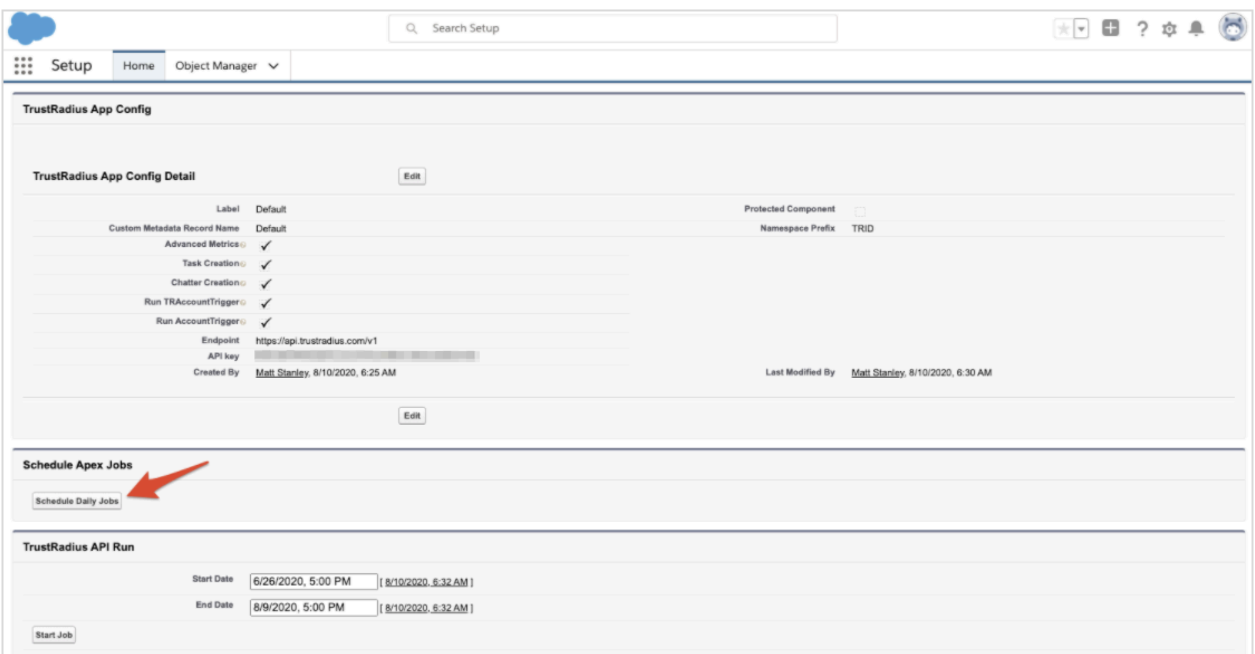
3. Click “Edit”.

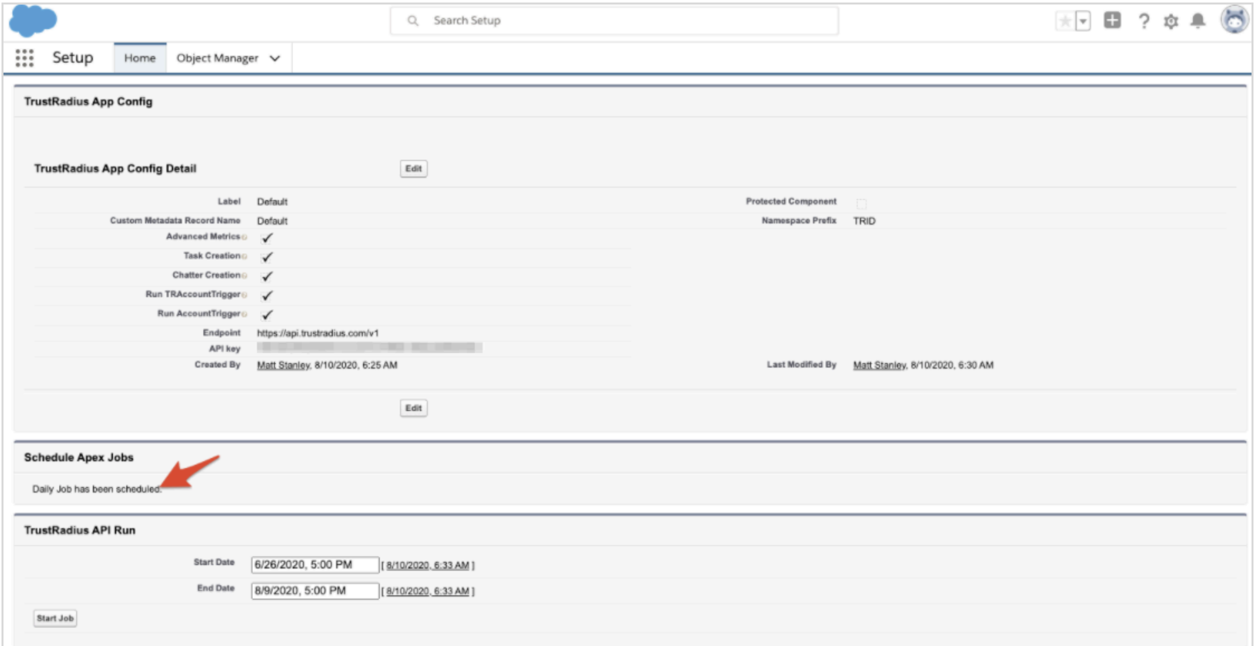


4. Input the API key provided by TrustRadius and click “Save”.

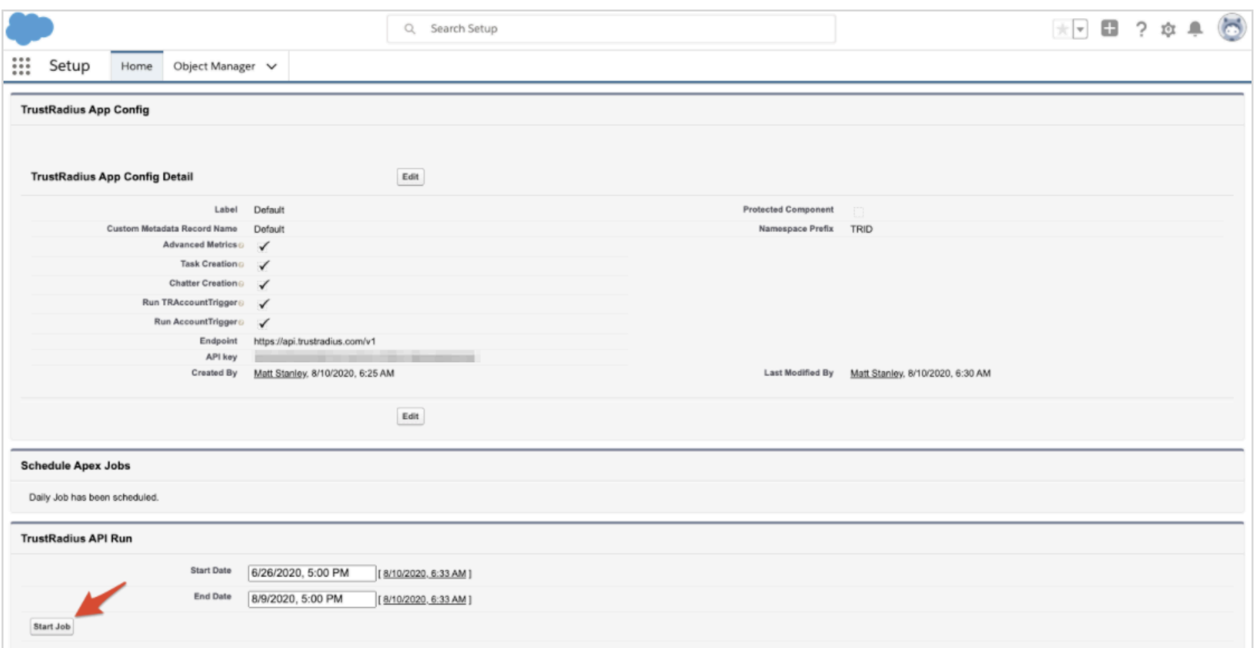


5. All Settings are ENABLED by default for optimal configuration and usage throughout your organization. Brief descriptions are provided below, and for more detailed descriptions of each setting click on the info ‘i’ next to the setting. All settings can be changed at any time by returning to Installed Packages and configuring the TrustRadius App.
    a. Advanced Metrics: enables the calculation of Opportunity Count and Value for matched Accounts. These metrics will be visible on the TrustRadius Account object and on the TrustRadius Dashboard. Summary level metrics will be returned to TrustRadius. This setting is critical for tracking key metrics across your organization. Please consult with your TrustRadius Customer Support Manager (CSM) with any questions before disabling.
    b. Task Creation: tasks will be created on matched Accounts when there is new activity for that Account on TrustRadius. Tasks will be assigned to the Account owner.
    c. Chatter Creation: Chatter messages will be created on matched Accounts when there is new activity for that Account on TrustRadius.
    d. Run TRAccountTrigger: enables the lookup of Salesforce Accounts from the TrustRadius Account object. This setting is necessary for matching Accounts to occur.
    e. Run AccountTrigger: enables the lookup of TrustRadius Accounts from Salesforce Accounts. This setting is necessary for matching Accounts to occur.
6. After the API key has been saved, click the “Schedule Daily Jobs” button to set up the scheduled calls to the TrustRadius API so that new intent data is pulled into Salesforce on a daily basis. After clicking the button, the message, “Daily Job has been scheduled.”, will be displayed.

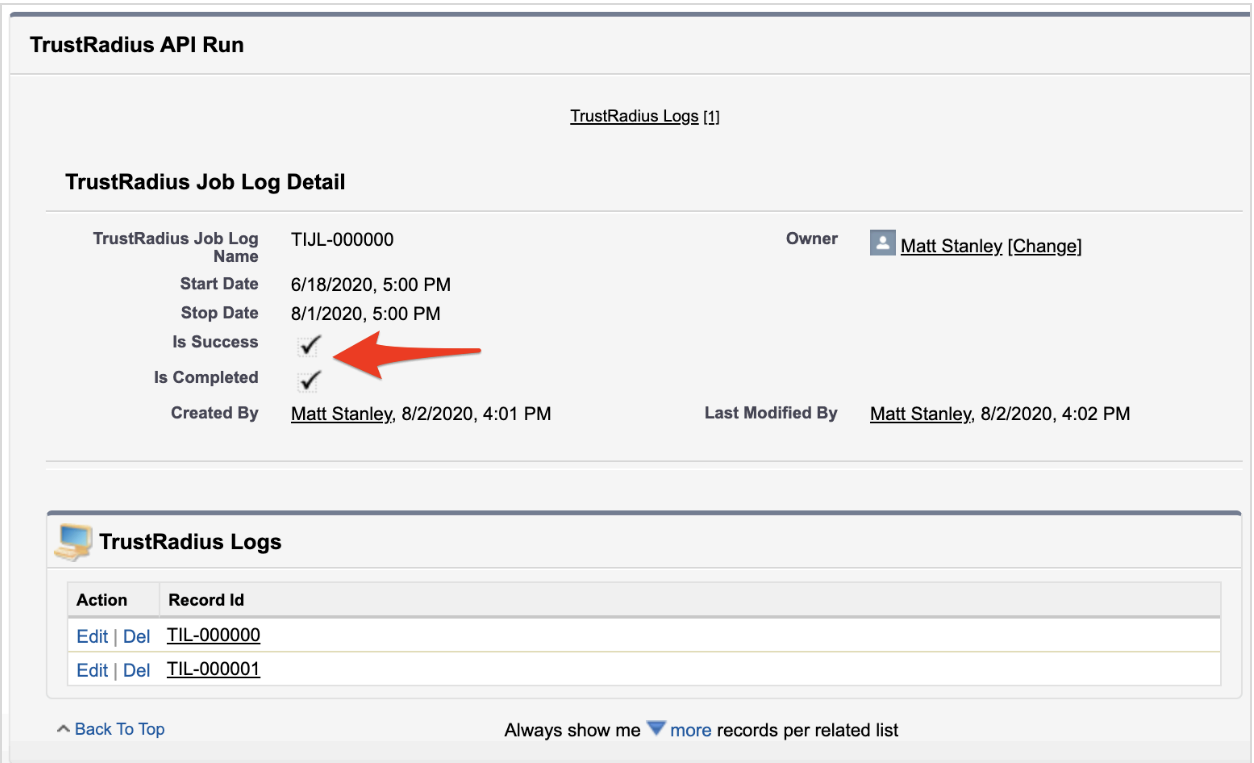




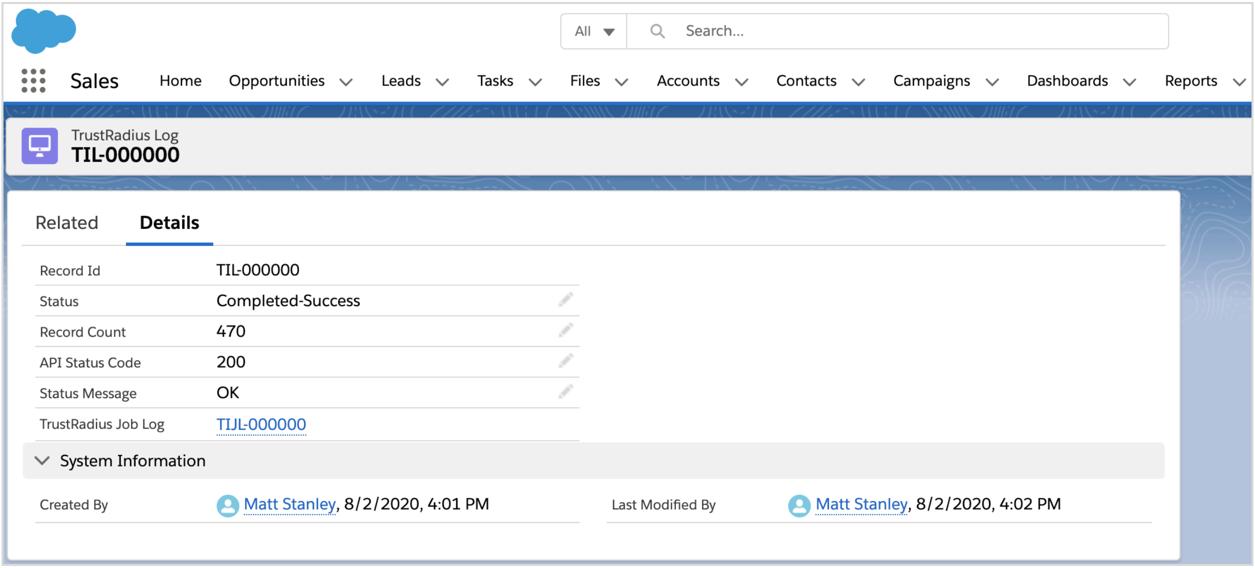
7. After scheduling the daily job, click the “Start Job” button in the TrustRadius API Run section - this will call the TrustRadius API to backfill intent data in Salesforce for the prior 45 days. If the first attempt for this job fails, please return to the configuration screen and run the job a second time. The job may take 5 to 10 minutes to complete.



8. Confirm that the job to pull the prior 45 days of intent data was successful. Multiple Log files may be created from the job depending on the number of records that are returned.
    a. If the “Is Success” box is not checked, open the Log file below to confirm if there was an issue with the job.
    b. The job can be re-run by navigating to your Installed Packages and opening the configuration screen for the TrustRadius Connector.



9. Select a Log file Record Id to see the number of records (TrustRadius Accounts) returned via the bootstrap.

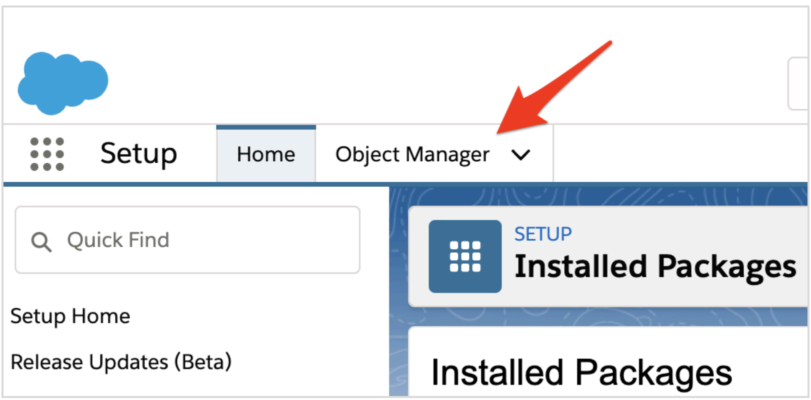


10. Configuring the TrustRadius App is now complete. Next, complete **Step 6: Setting up Chatter on the TrustRadius Account Object.**

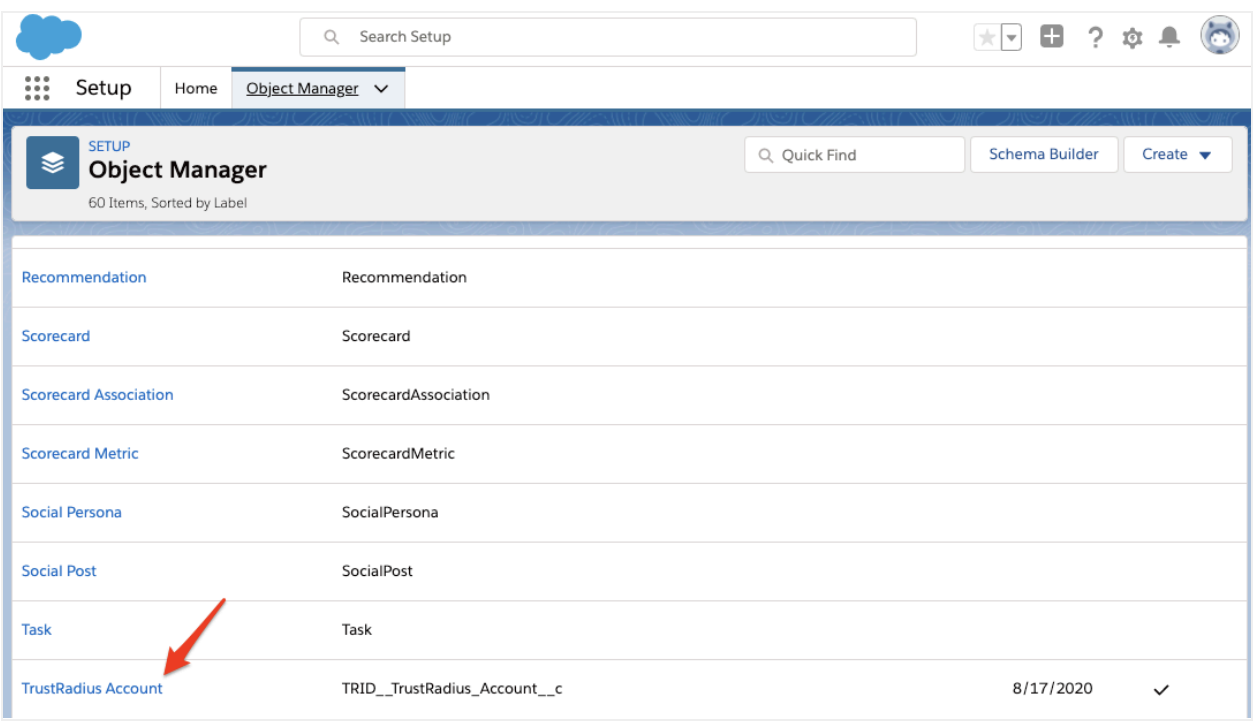
Step 6: Set up Chatter on the TrustRadius Account Object

**Note*: if your organization does not have Chatter enabled, you may skip this step.

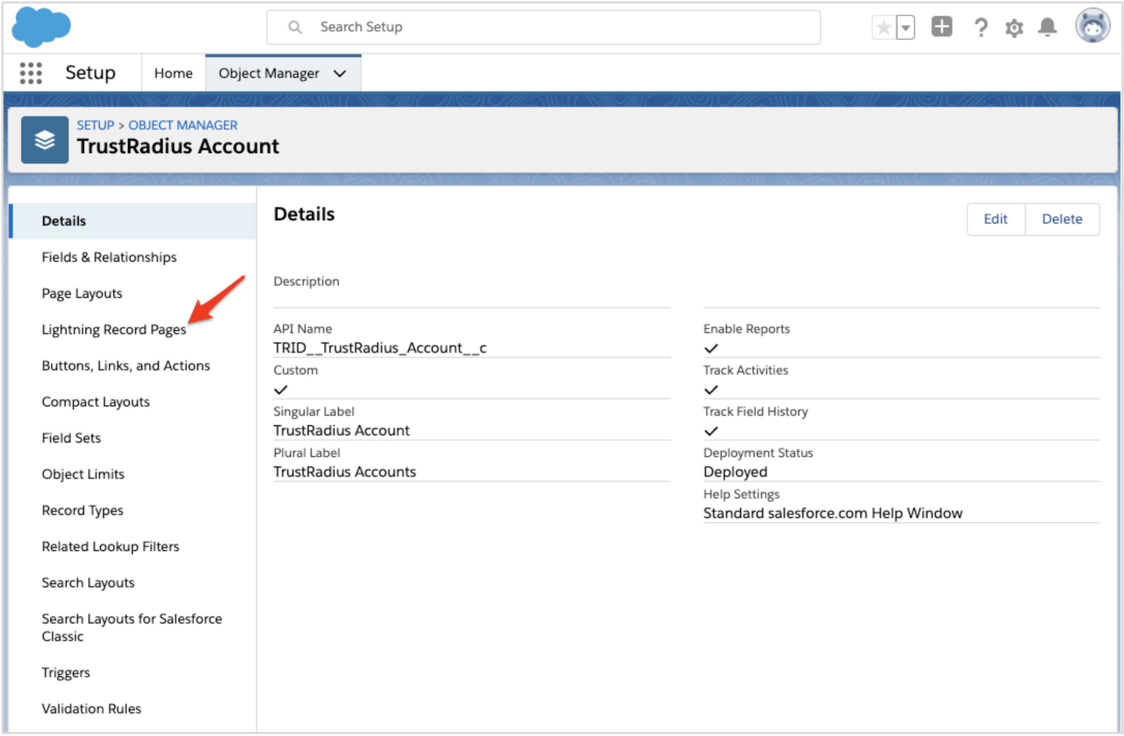
1. From the Setup page, click "Object Manager".



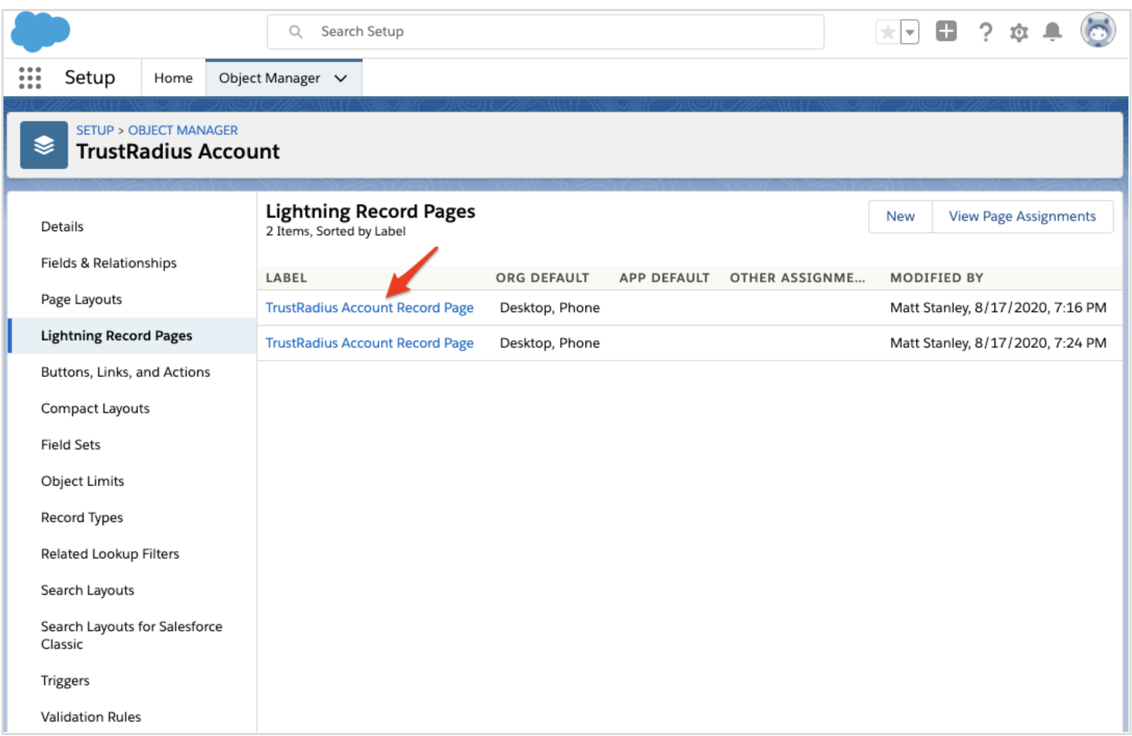
2. Click "TrustRadius Account".



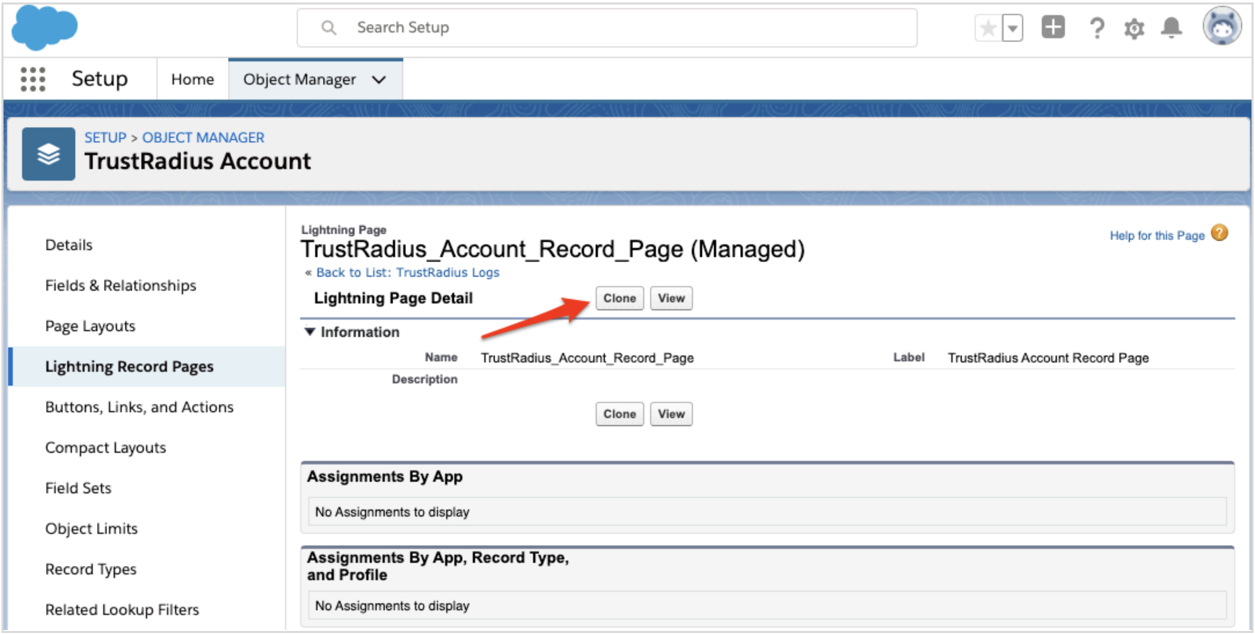
3. Click “Lightning Record Pages”.



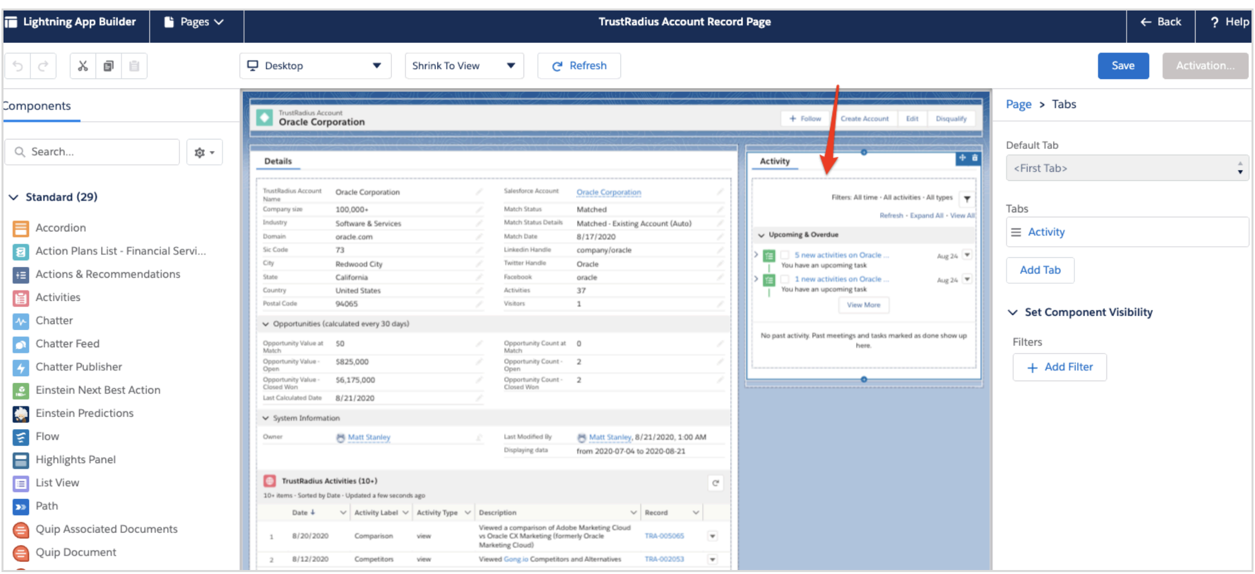
4. Click “TrustRadius Account Record Page”.



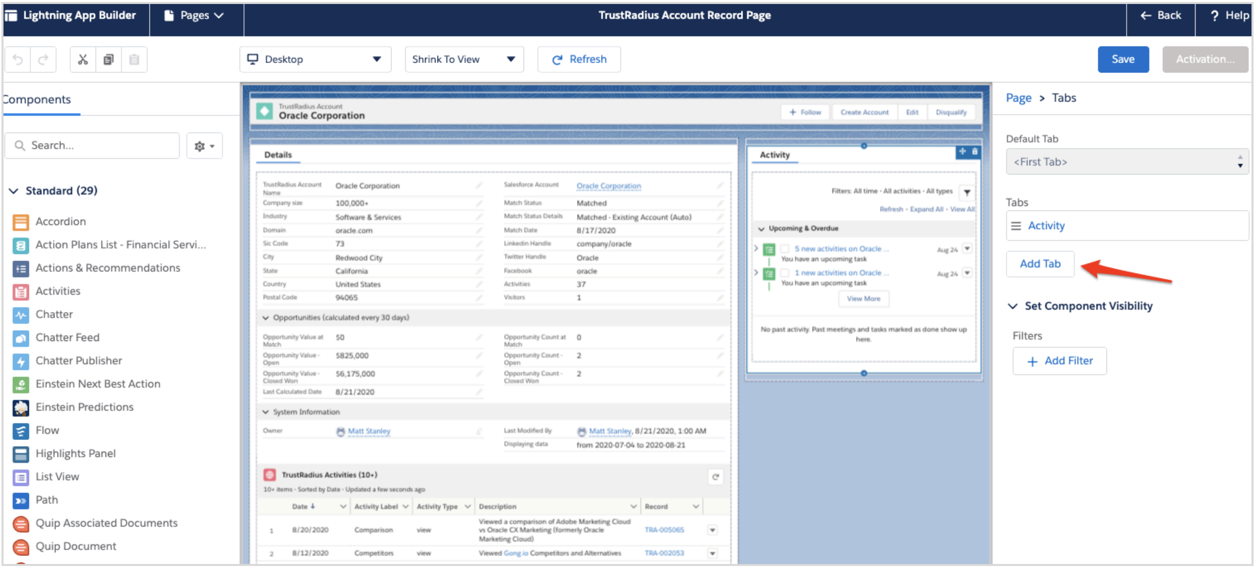
5. Click on “Clone”.



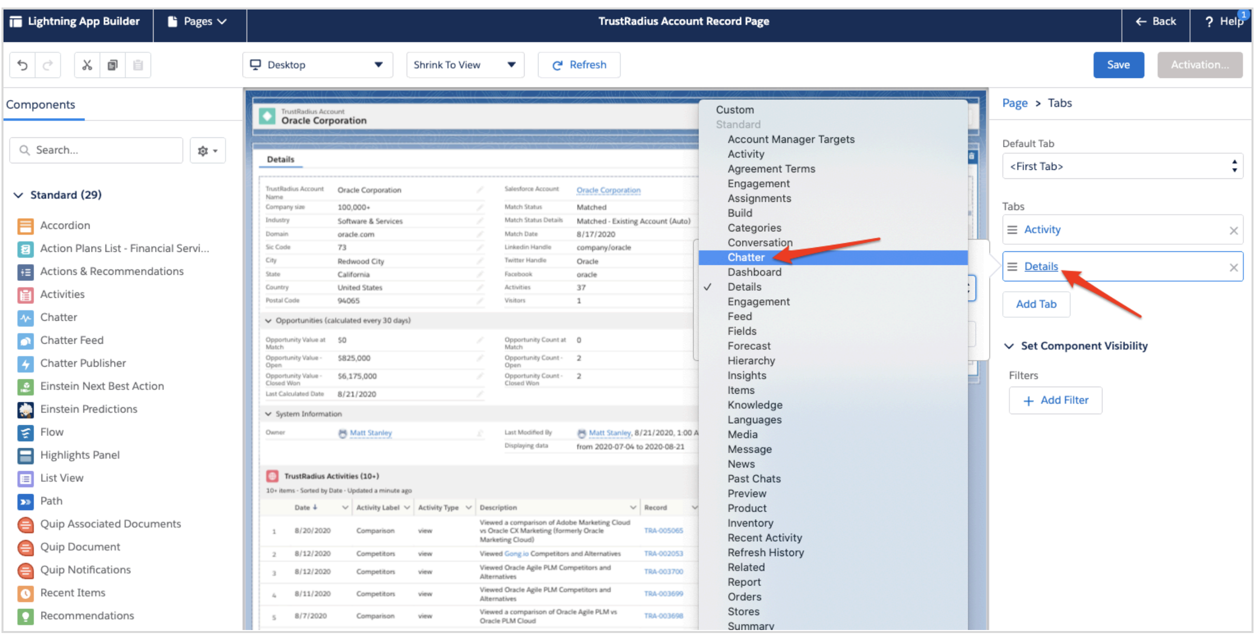
6. Click on the “Activity” tab.



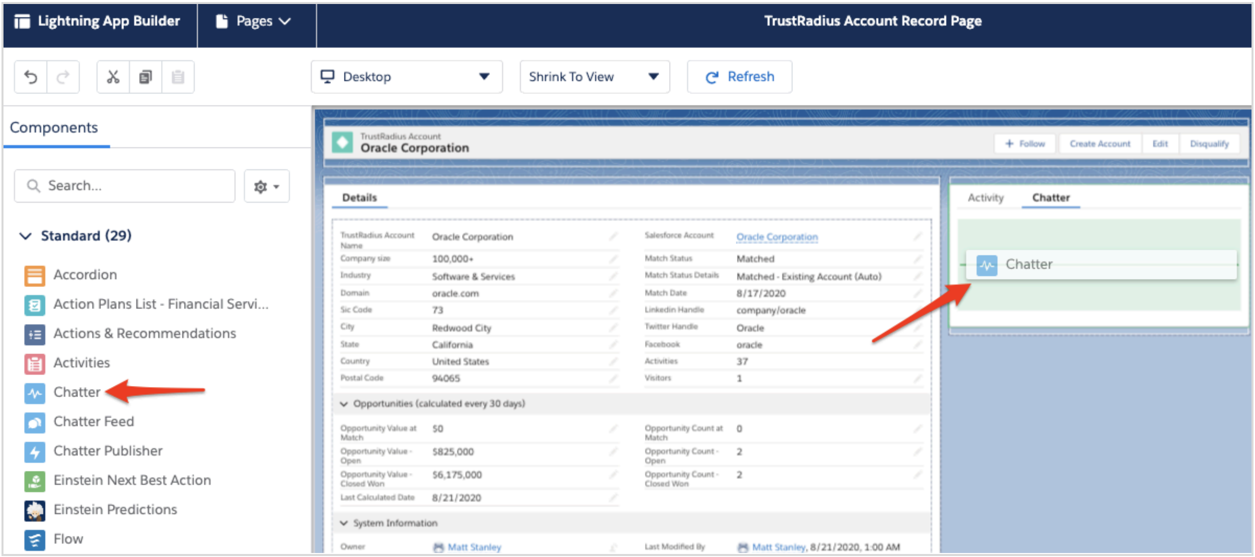
7. Click on “Add Tab”.



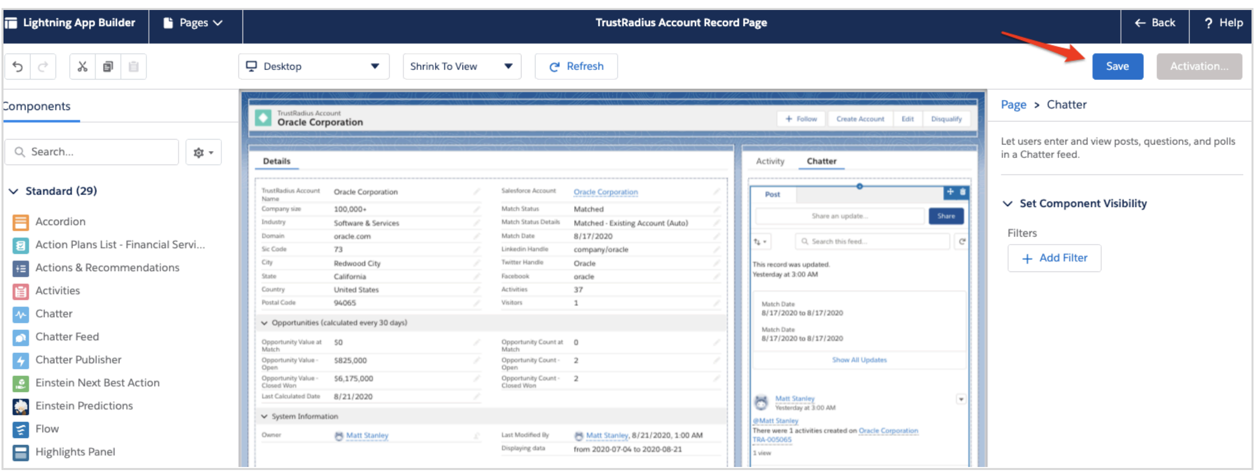
8. Click on “Details”, select “Chatter” from the dropdown menu, and then click “Done”.



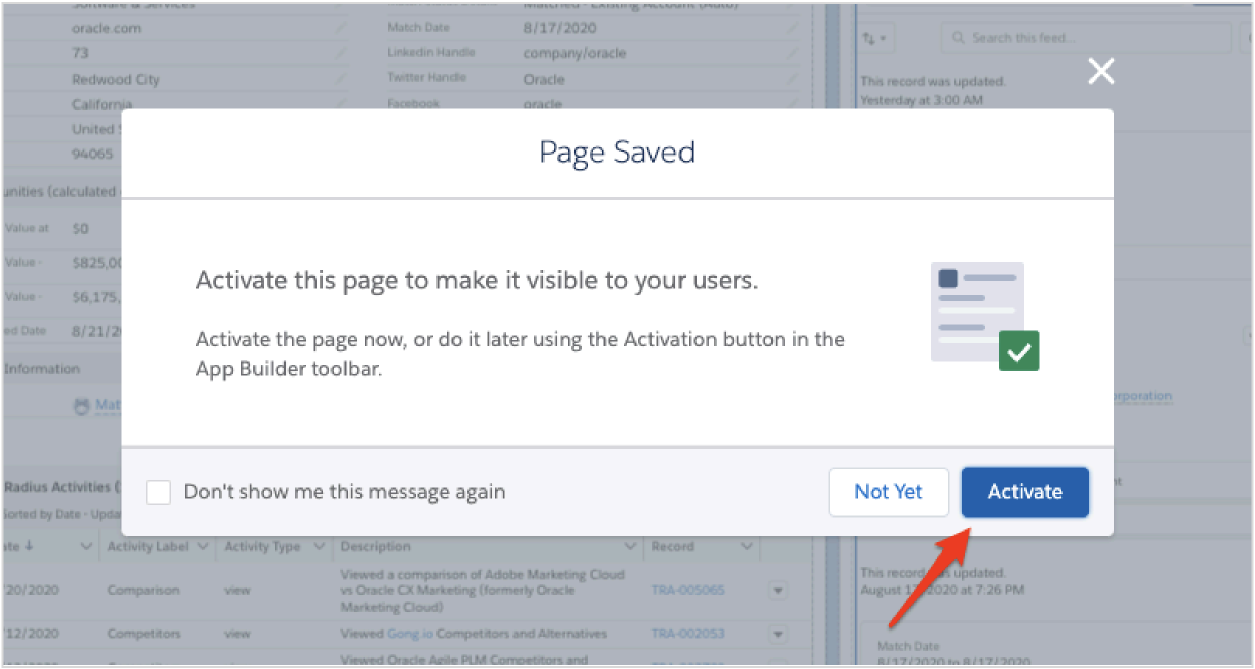
9. Drag the “Chatter” component from the left panel onto the Chatter tab.



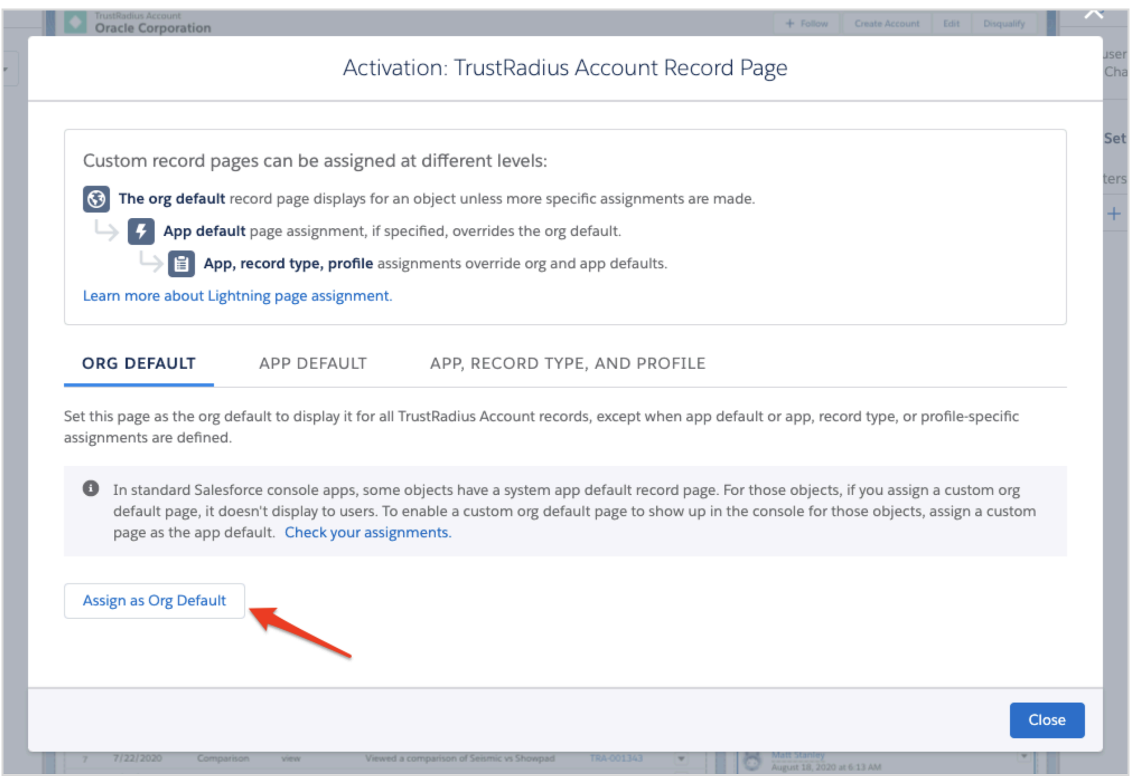
10. Click “Save”.

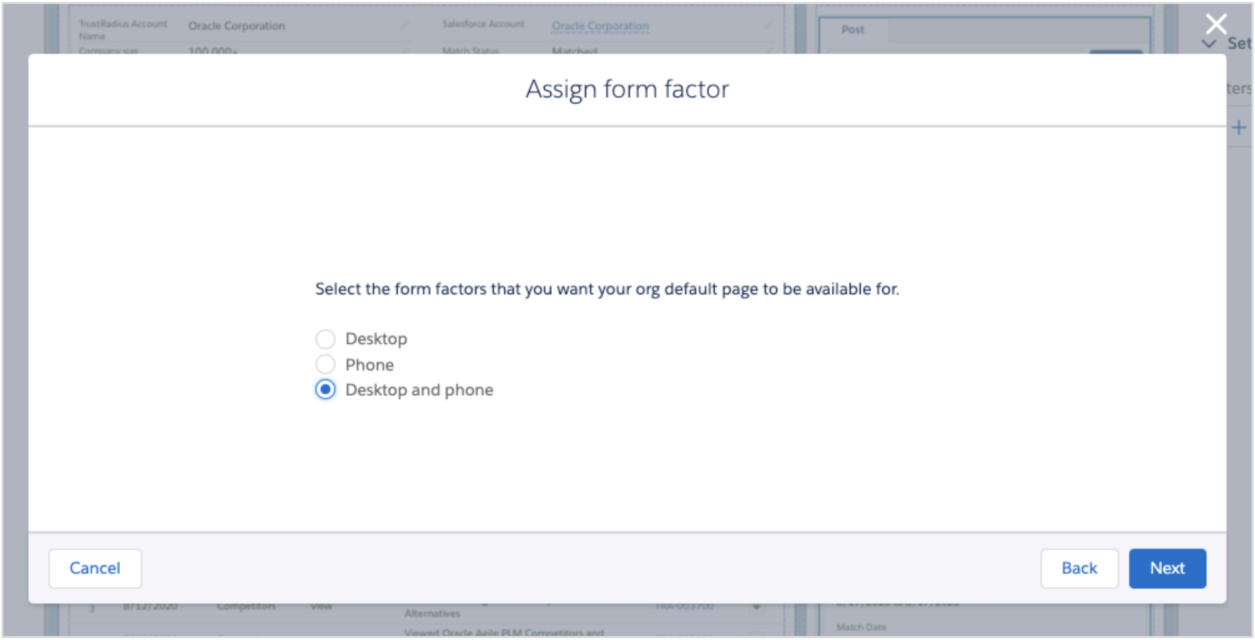


11. Click “Activate”.

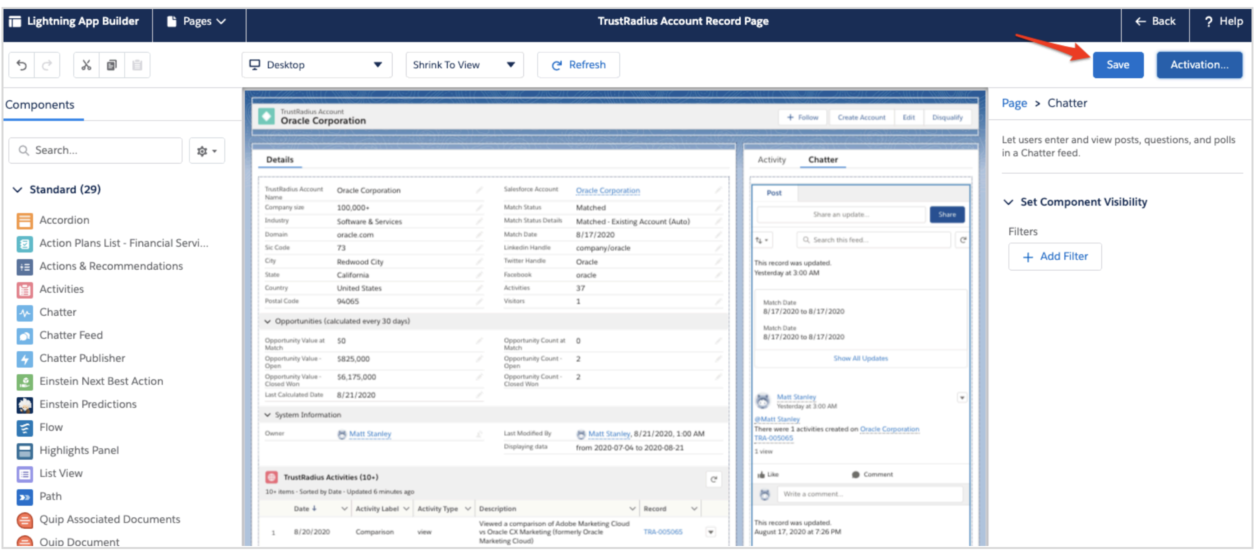


12. Click “Assign as Org default”, select for both Desktop and Phone, click “Next”, and “Save”.

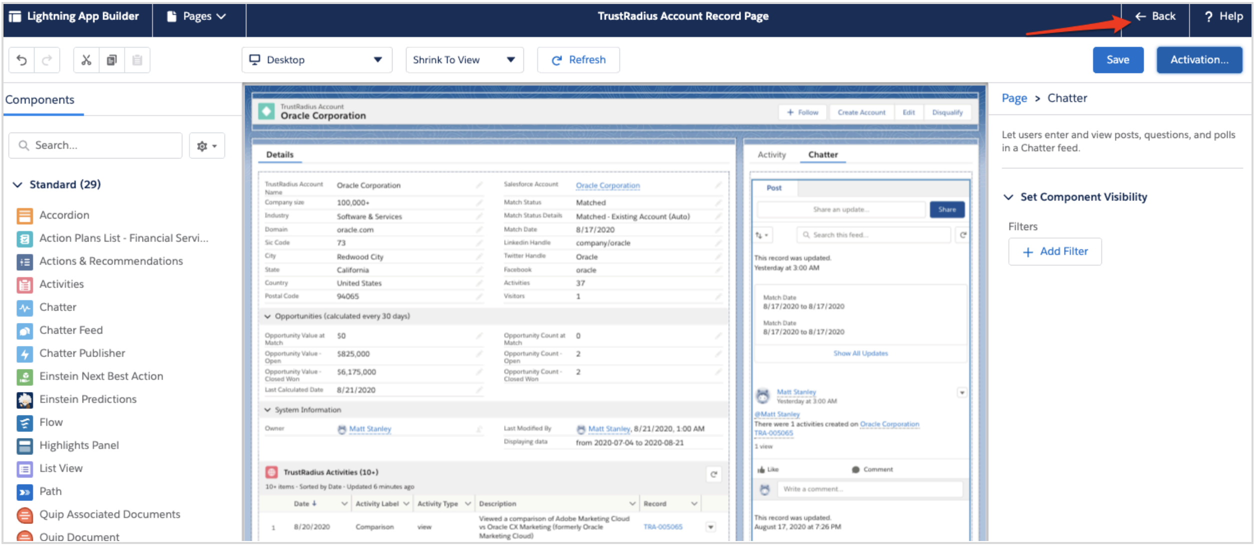




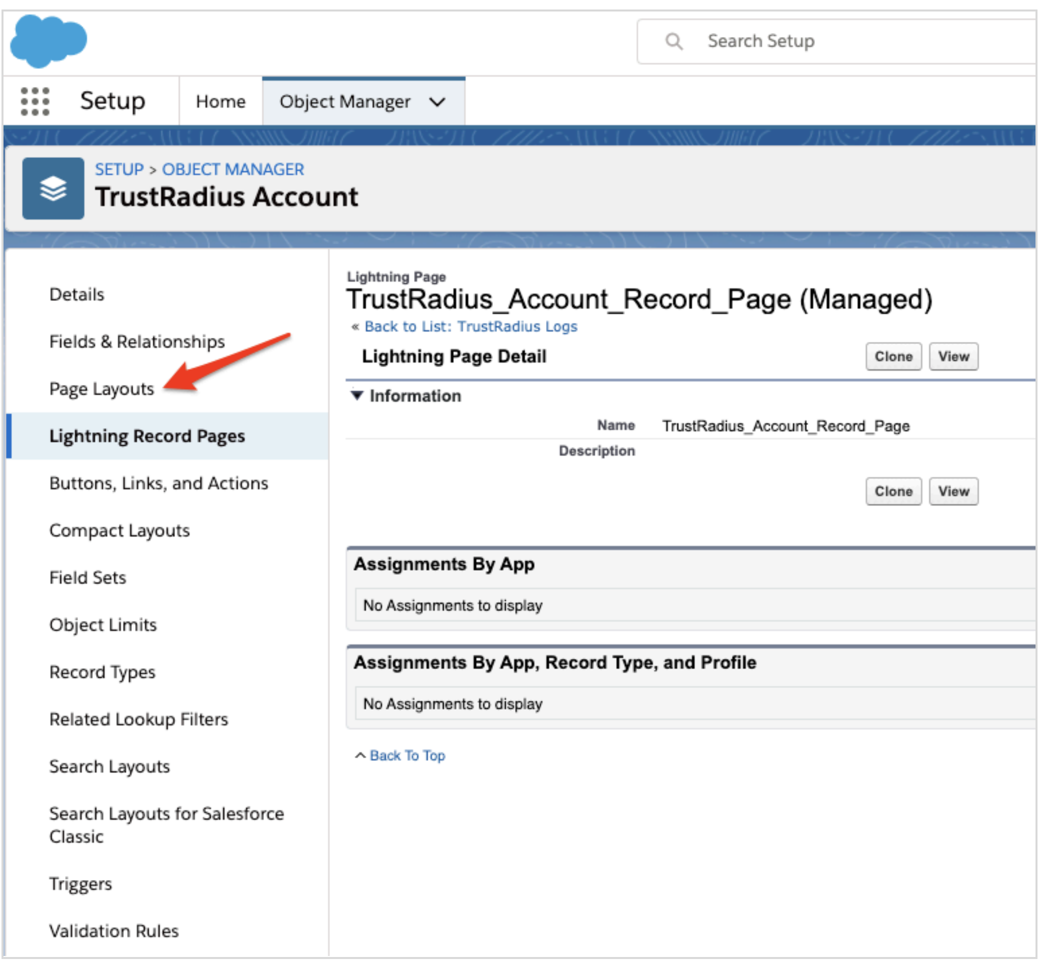
13. Click “Save”



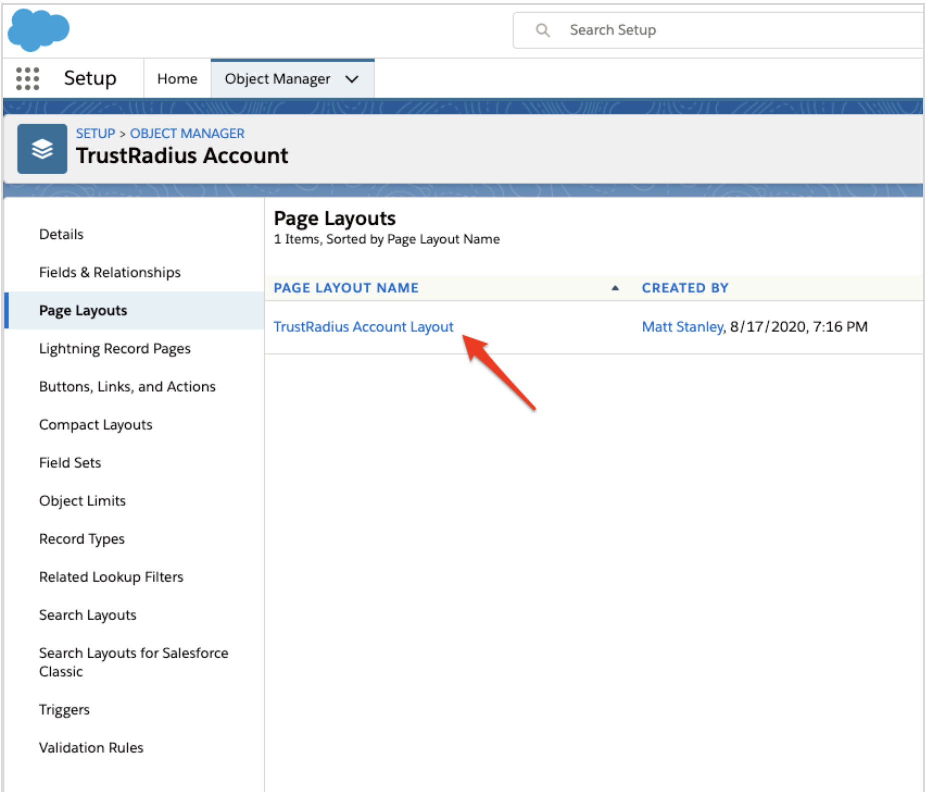
14. Click on the “Back” button in the top right.



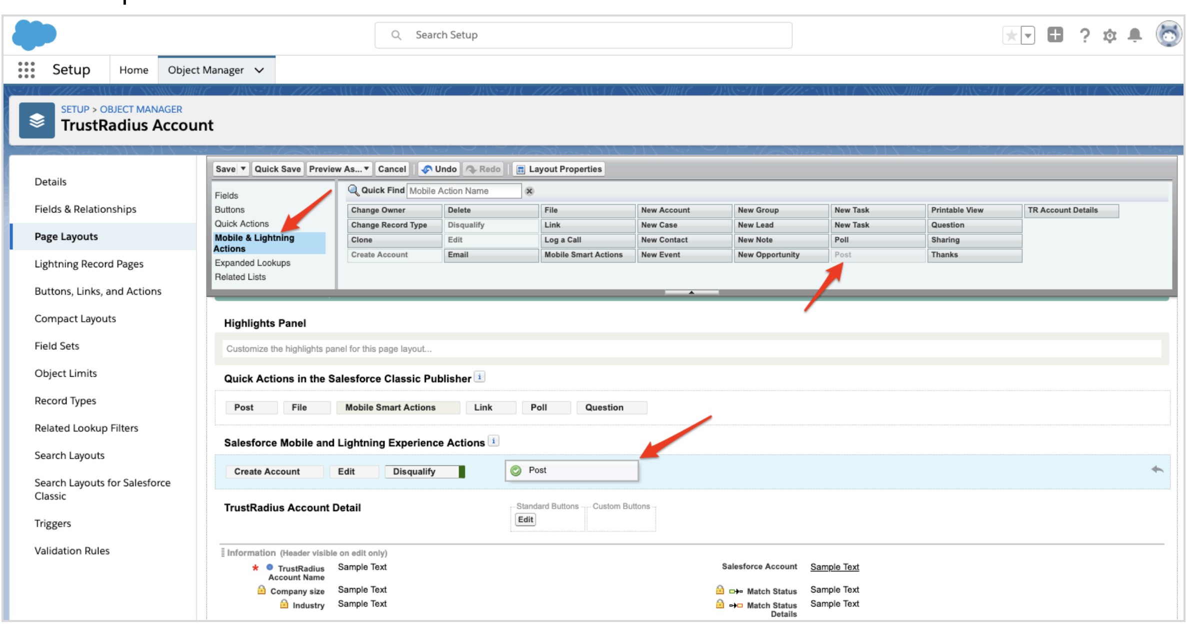
15. Click on “Page Layout” in the left panel.



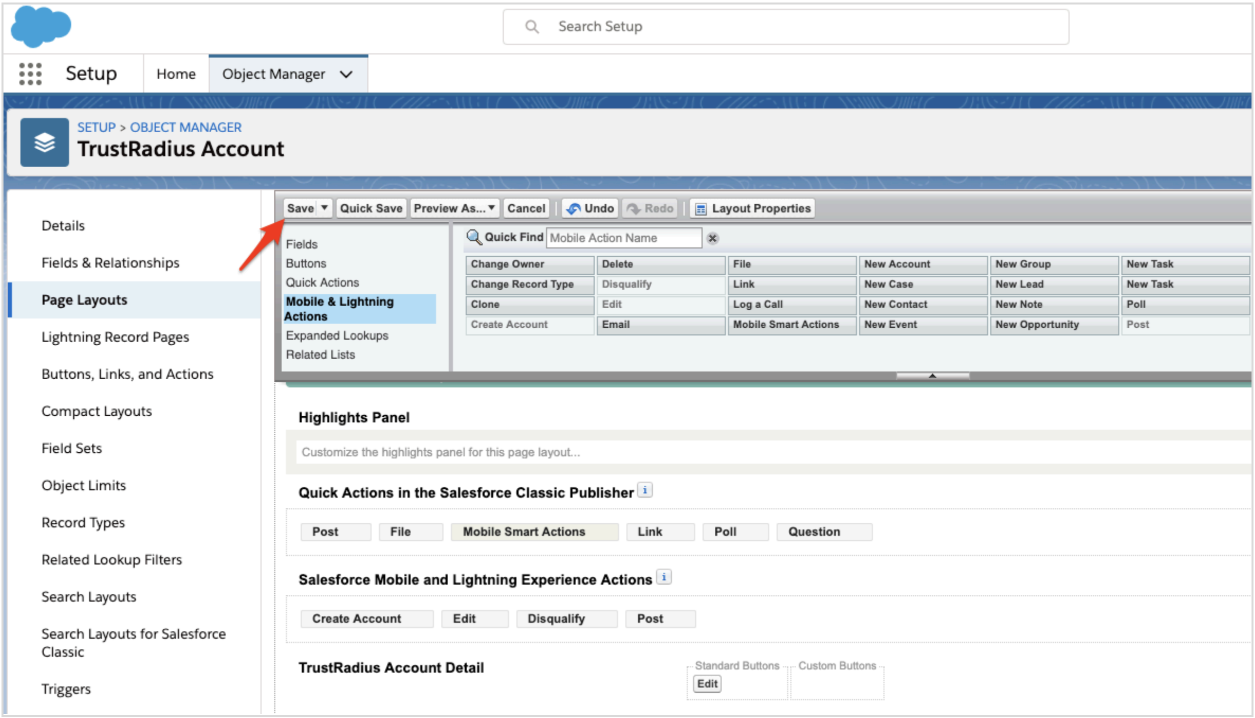
16. Click on “TrustRadius Account Layout”.



17. Select “Mobile & Lightning Actions” and drag “Post” to the “Salesforce Mobile and Lightning Experience Actions” section.



18. Click "Save".

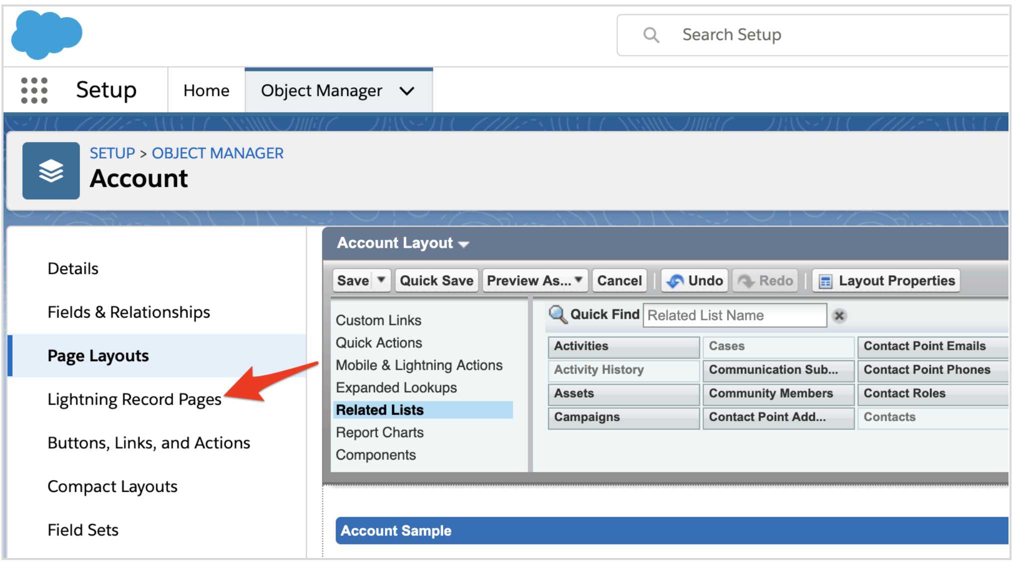


19. Setting up Chatter on the TrustRadius Account Object is now complete.

Step 7: Set up Tasks on the Account Object

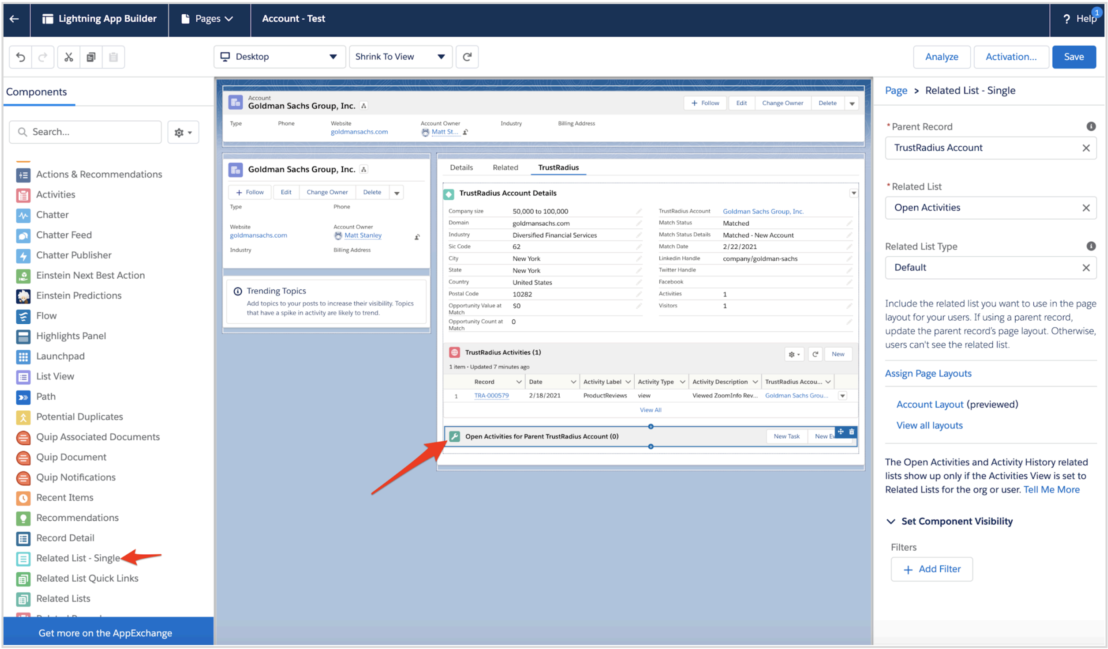
**Note: this step is optional; it is needed if you want to utilize Salesforce Tasks to alert Account Owners when there is new intent activity for one of their owned accounts.*

1. From the Setup page, select "Lightning Record Pages".

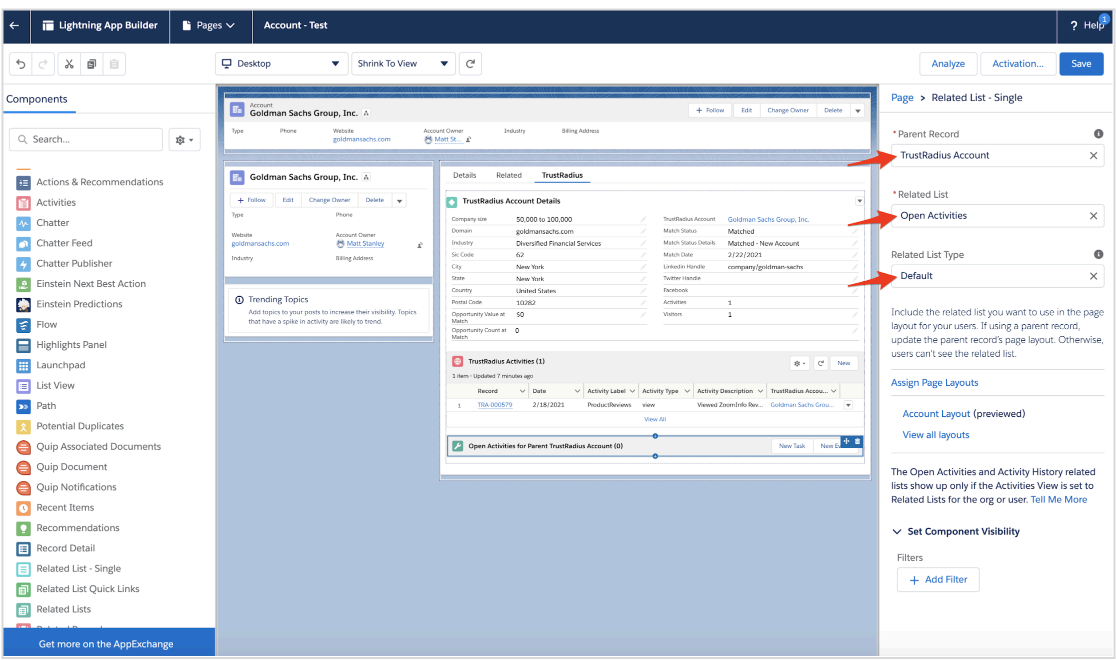


2. Select the Lightning Record Page(s) used for displaying Salesforce Accounts to members of your organization. Click "Edit".
3. Click on the "TrustRadius" tab created in Step 3 of this guide.

4. Drag a ‘Related List - Single’ component into the ‘TrustRadius’ tab.



5. Set the Parent Record to “TrustRadius Account”; set the Related List to “Open Activities”; set the Related List Type to “Default”

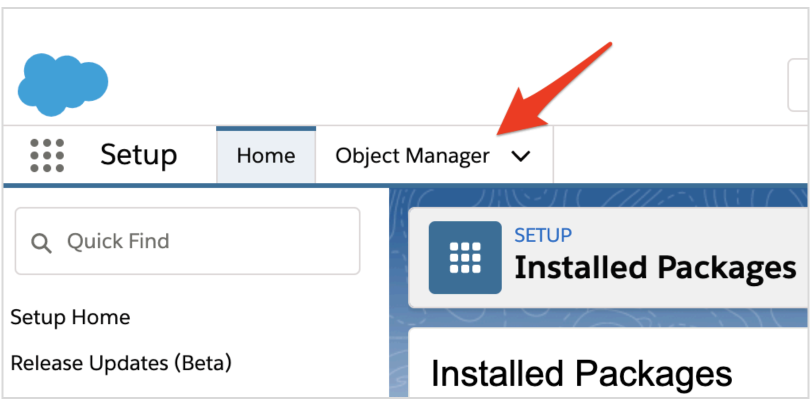


6. Click “Save” in the upper right corner to save your changes.

Step 8: Update the *User* Object to enable Chatter/Task configuration at individual User level

**Note, this step is optional and is only necessary if you wish to be able to control whether individual users of the TrustRadius Connector receive Chatter notifications or Tasks when there are new intent activities ("TrustRadius Activities") for an account which they own.*

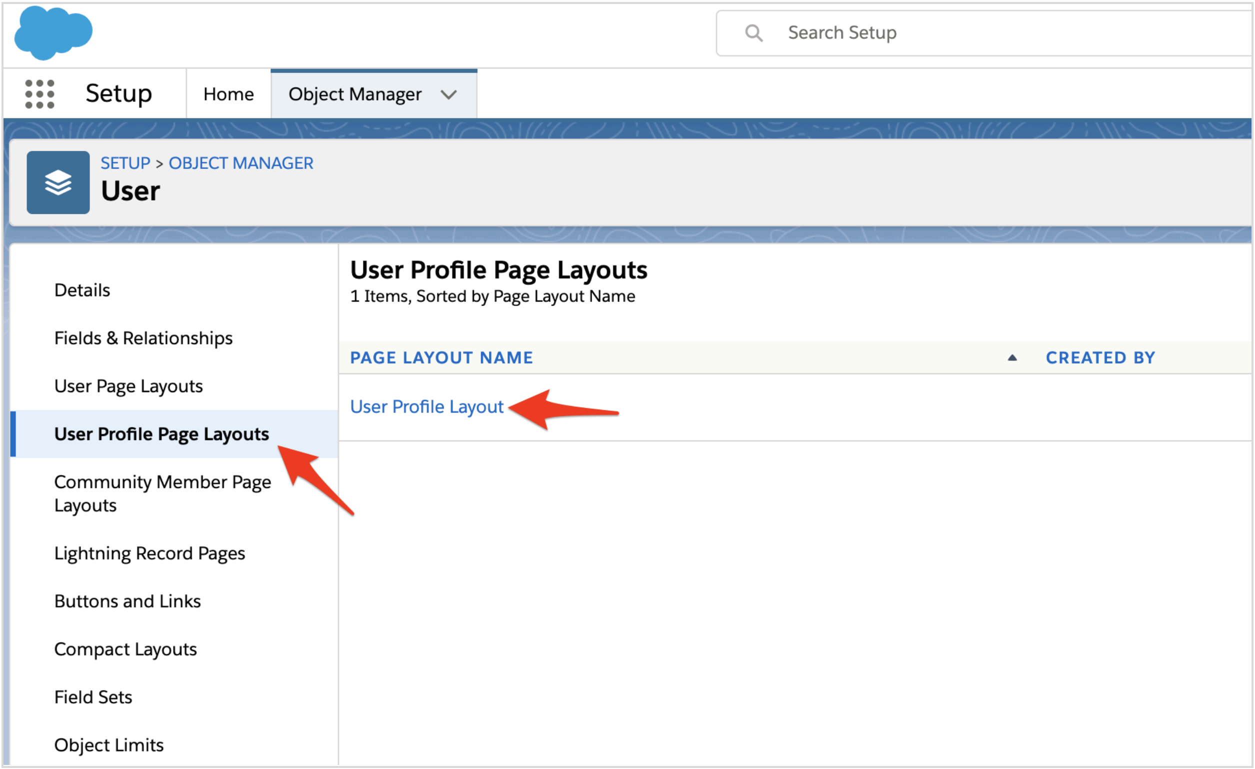
1. From the Setup page, click "Object Manager".



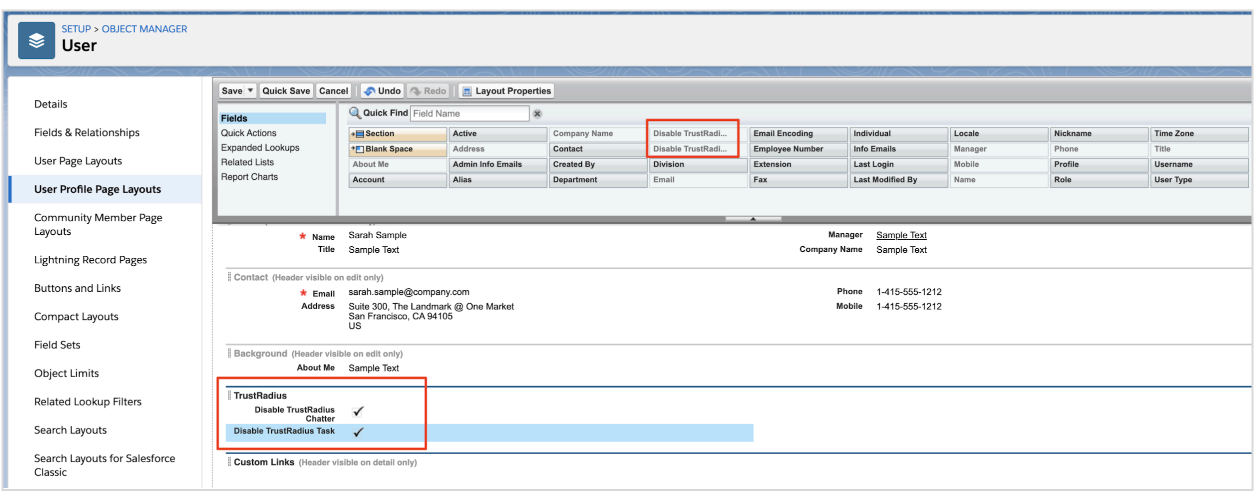
2. Click "User".

TrustRadius Account	TRID__TrustRadius_Account__c	Custom Object
TrustRadius Activity	TRID__TrustRadius_Activity__c	Custom Object
TrustRadius Job Log	TRID__TrustRadius_Job_Log__c	Custom Object
TrustRadius Log	TRID__TrustRadius_Log__c	Custom Object
TrustRadius Metrics	TRID__TrustRadius_Metrics__c	Custom Object
User	User	Standard Object
User Provisioning Request	UserProvisioningRequest	Standard Object

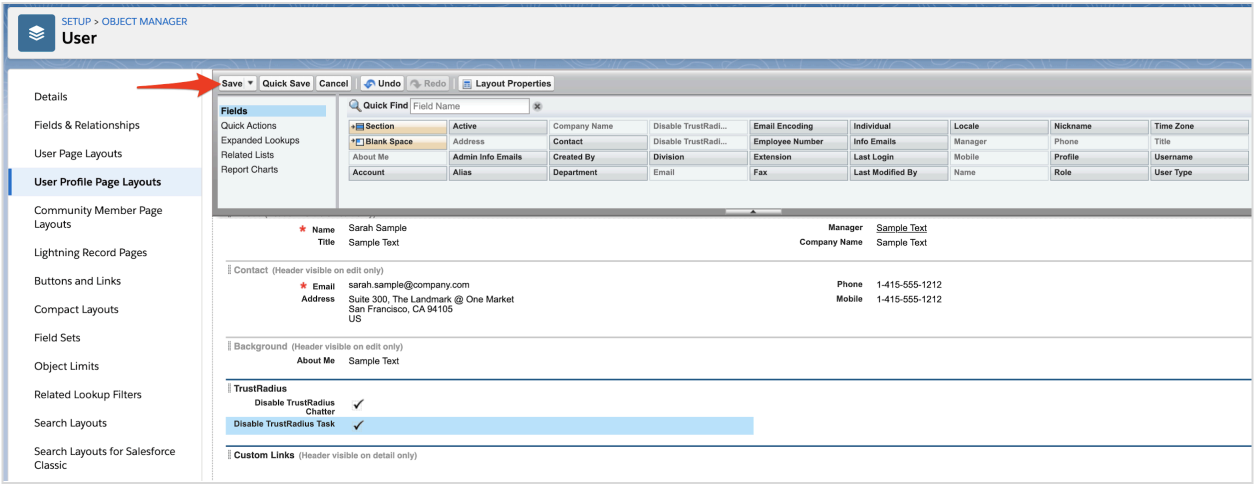
3. Click “User Page Layouts” and open the “User Profile Layout”.



4. Drag and drop the fields “Disable TrustRadius Chatter" and "Disable TrustRadius Tasks" onto the Page Layout.



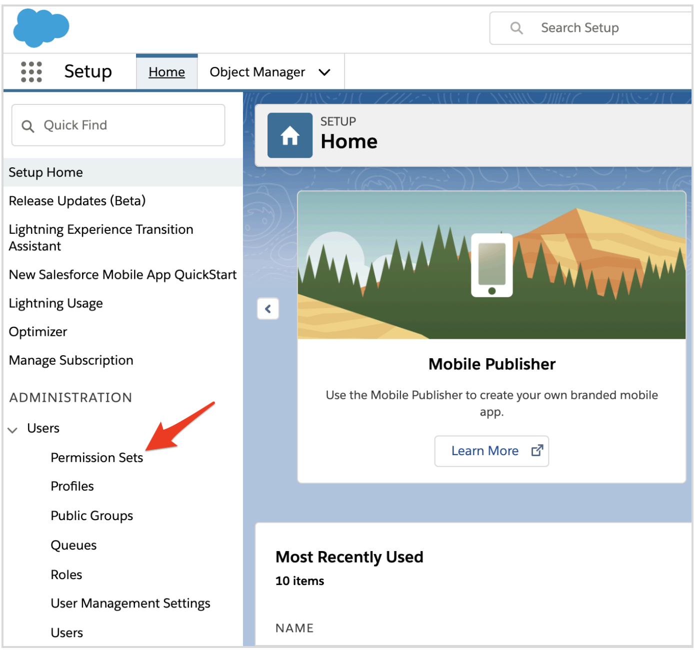
5. Click “Save” on the Page Layout.



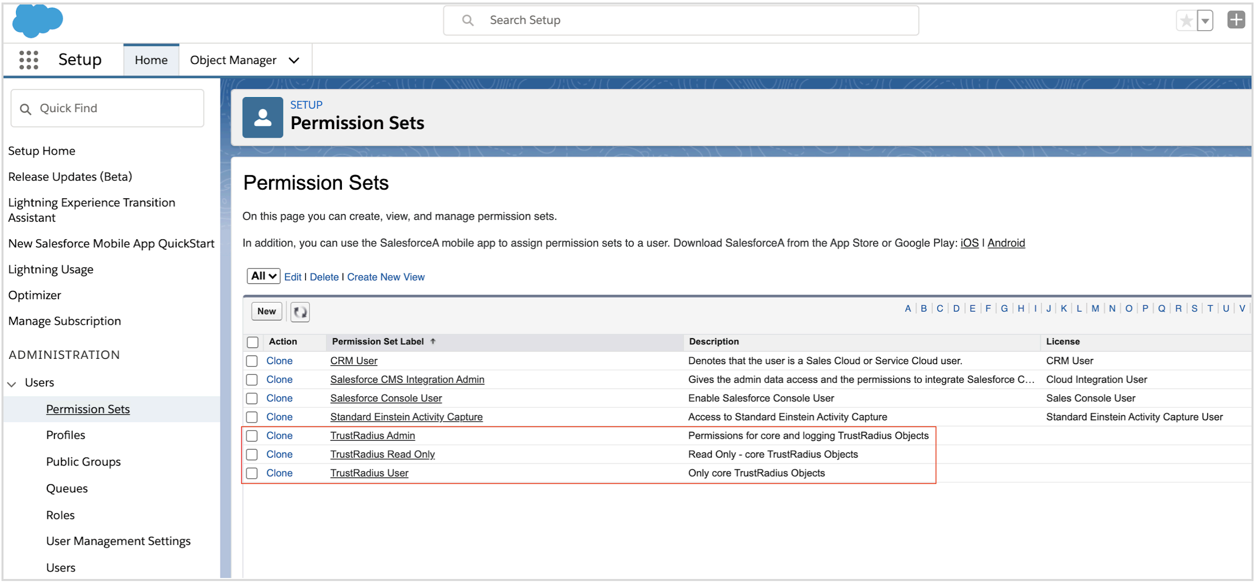
Uninstalling the TrustRadius Connector

To uninstall the TrustRadius Connector you will need to remove all permissions from Users in your organization and remove all custom fields and objects from your Salesforce Account.

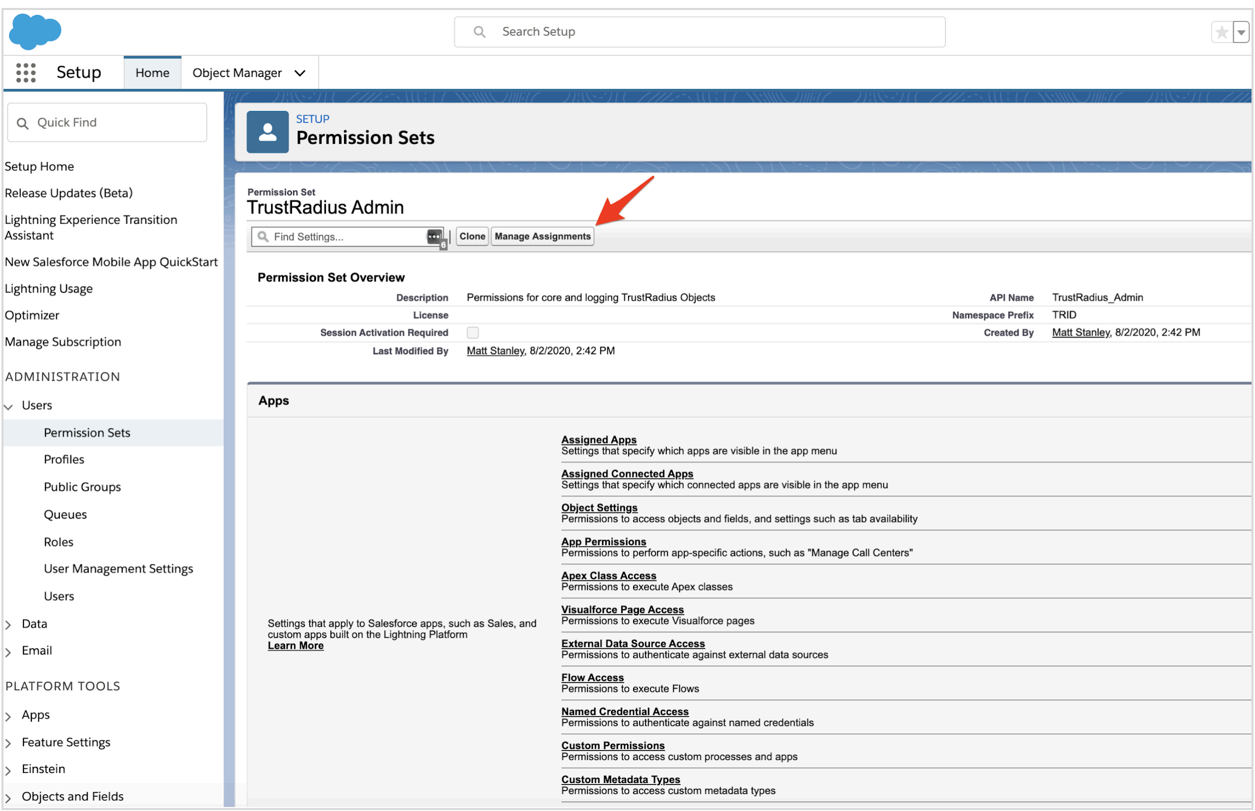
1. From the Setup page, navigate to Permission Sets for Users.



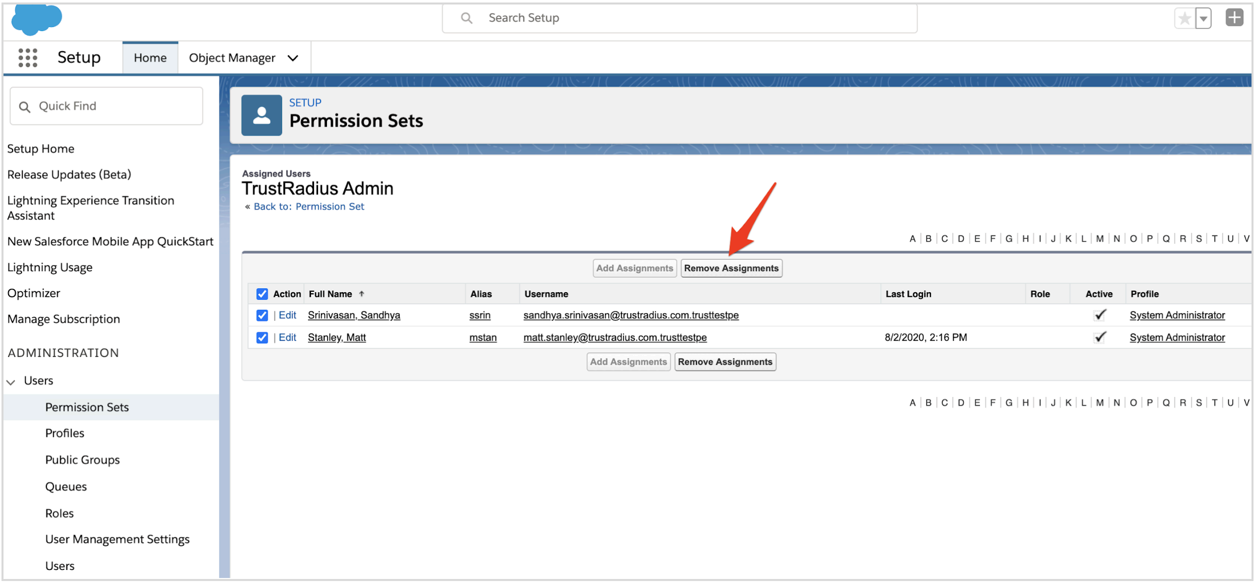
2. Select a TrustRadius permission set.



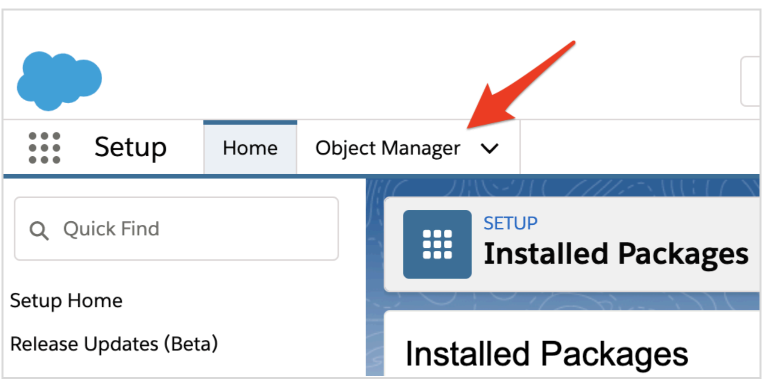
3. Click “Manage Assignments”.



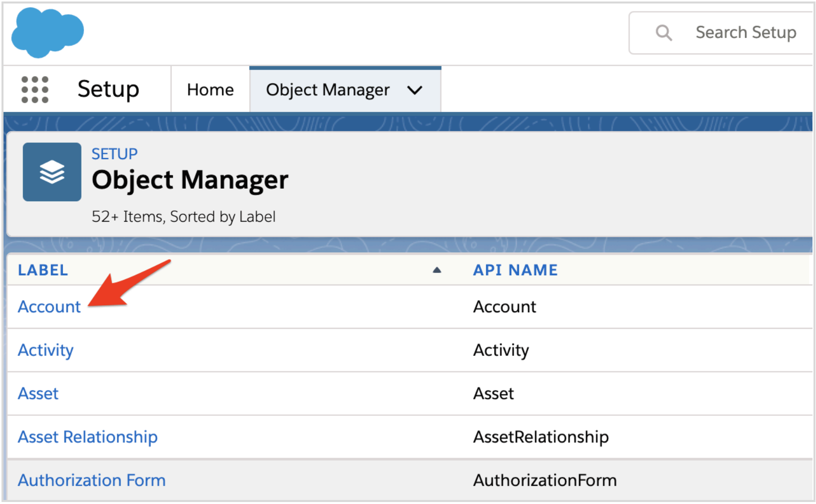
4. Select all Users and click “Remove Assignments”.



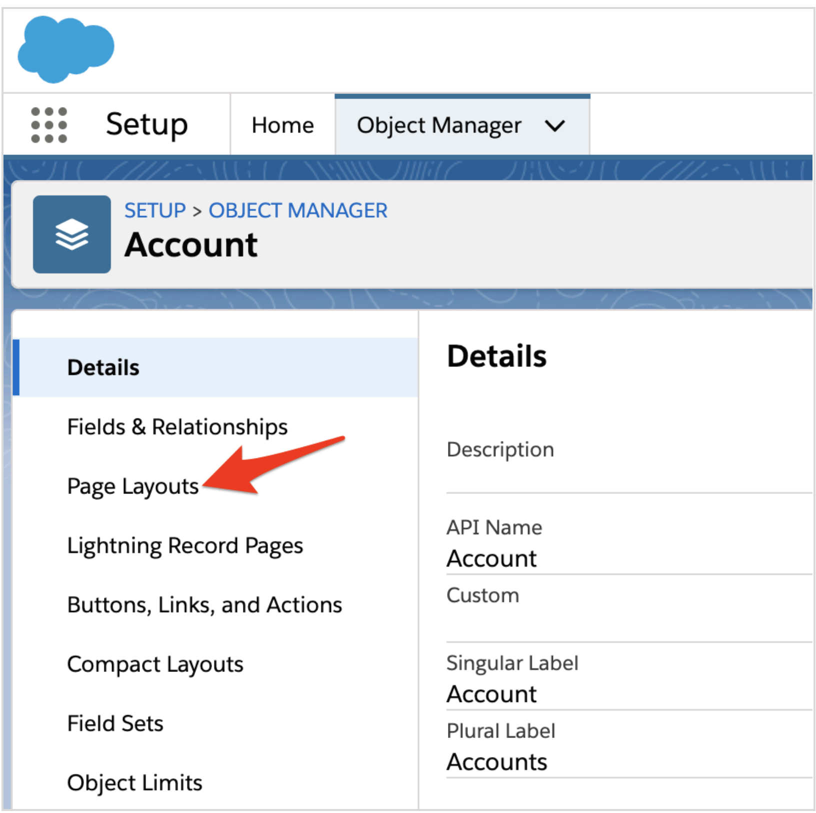
5. Repeat steps above for each TrustRadius permission set (TrustRadius Admin, TrustRadius User, TrustRadius Read-Only).
6. Select “Object Manager”.



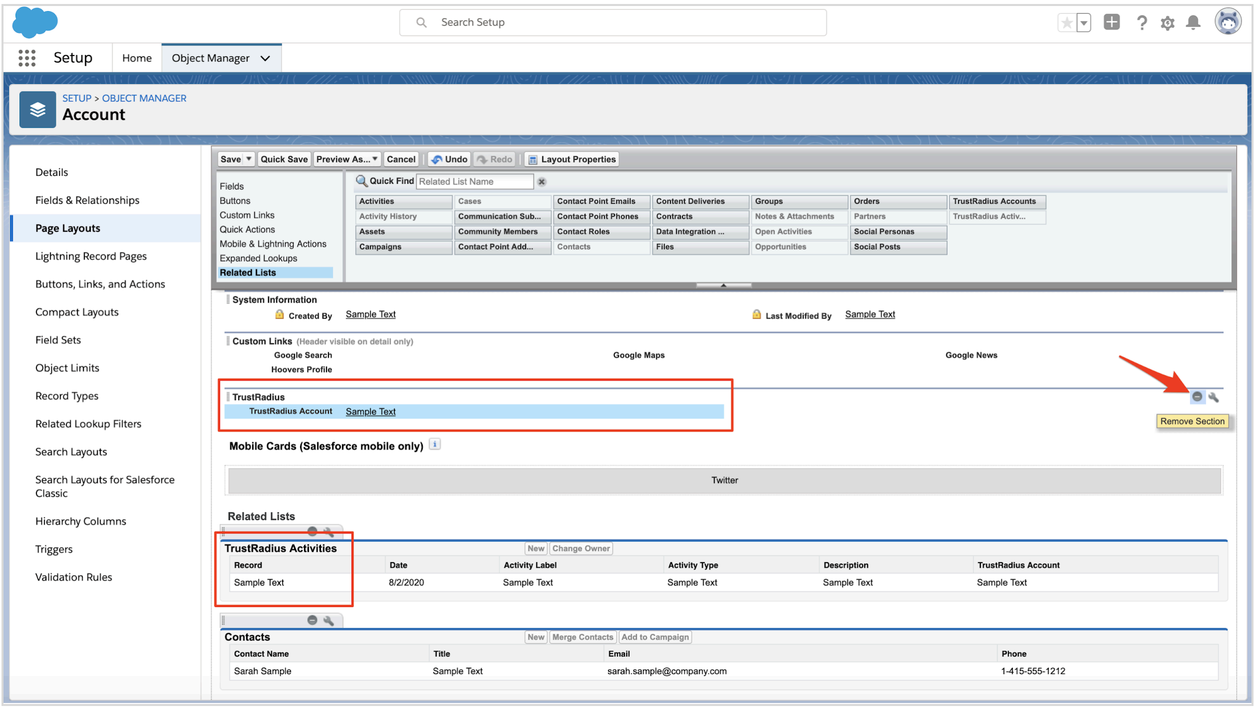
7. Select “Account”.



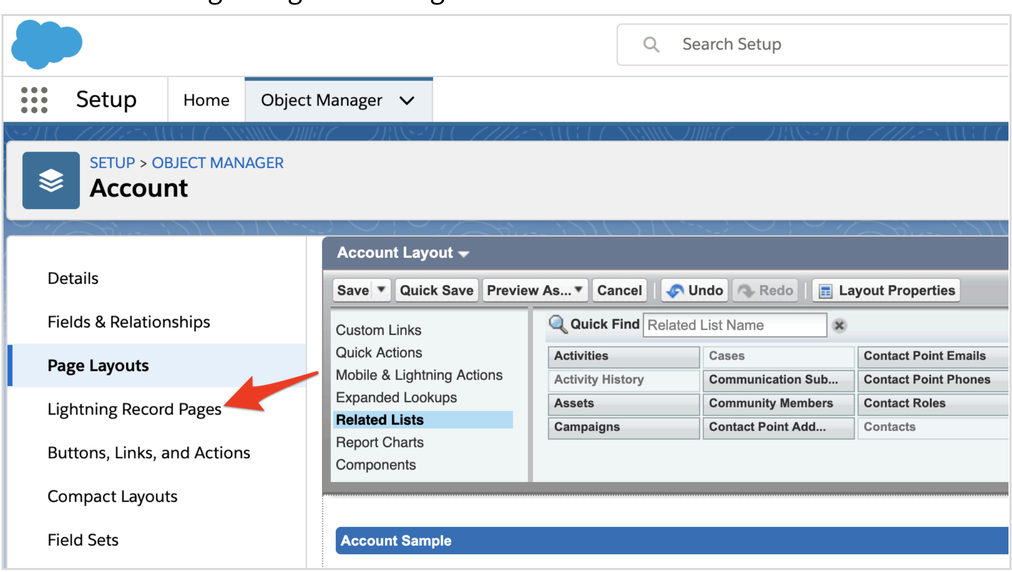
8. Select “Page Layouts”.



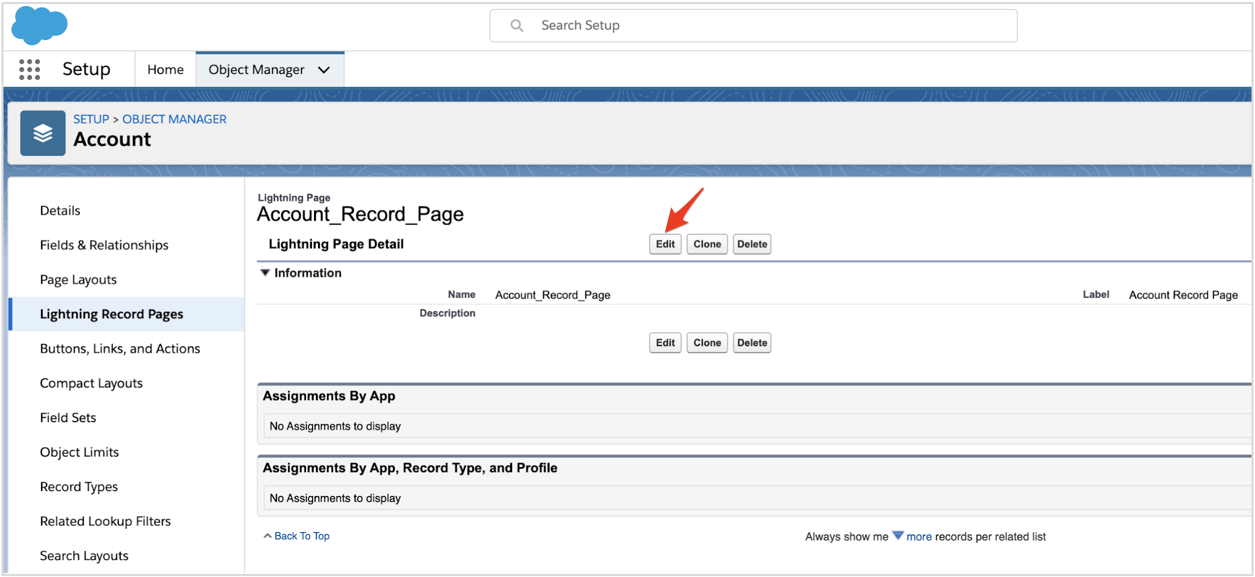
9. Select the Page Layouts which include TrustRadius objects and fields.
10. Remove the “TrustRadius” Section and “TrustRadius Activities” Related List from the Page Layout. Click “Save”.



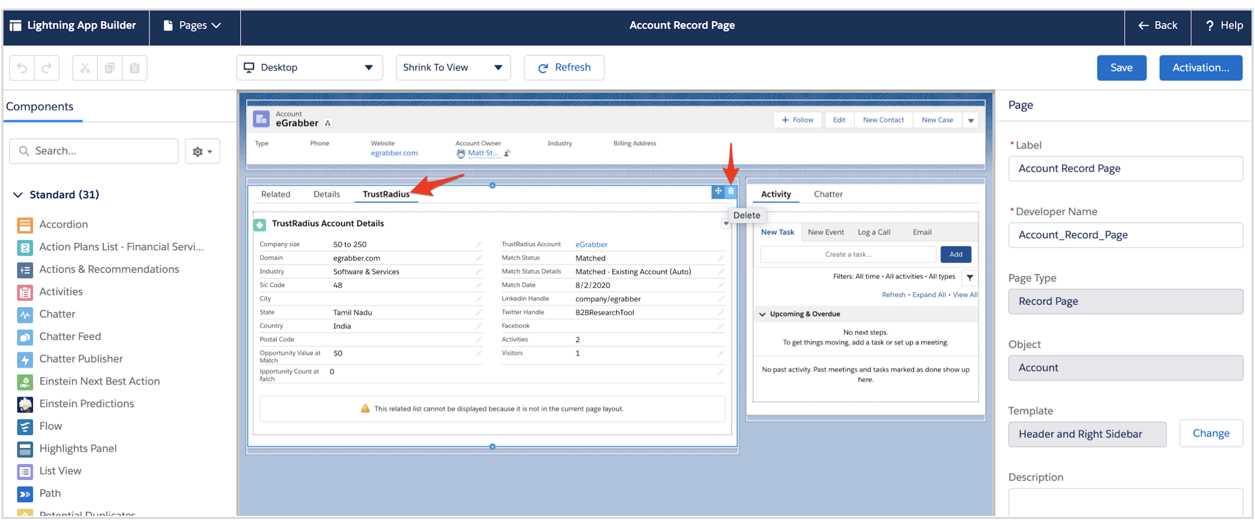
7. Select “Lightning Record Pages”.



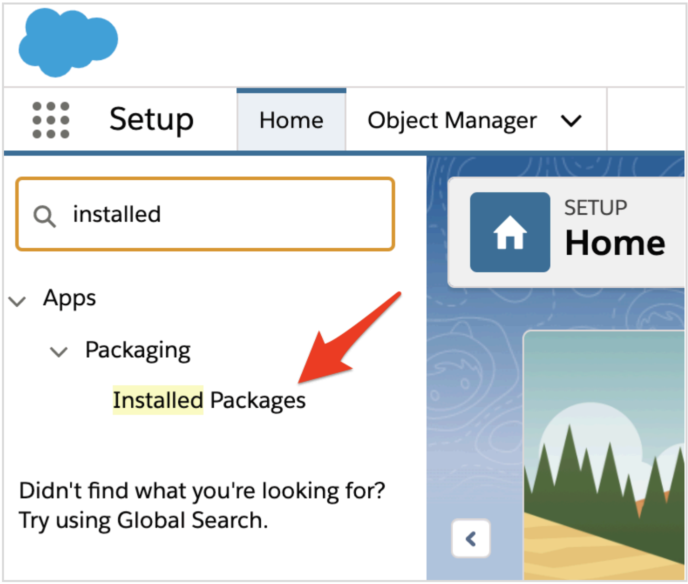
8. Select the Lightning Record Page(s) which include TrustRadius objects and fields.
9. Click “Edit”.



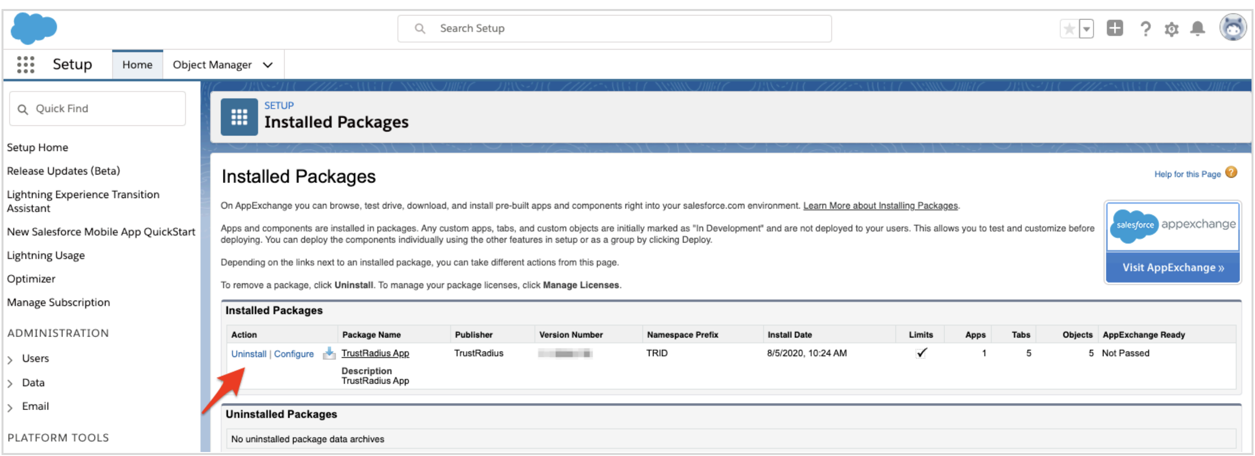
10. Select the “TrustRadius” tab and click the trash icon in the upper right hand corner.
11. Click “Save”.



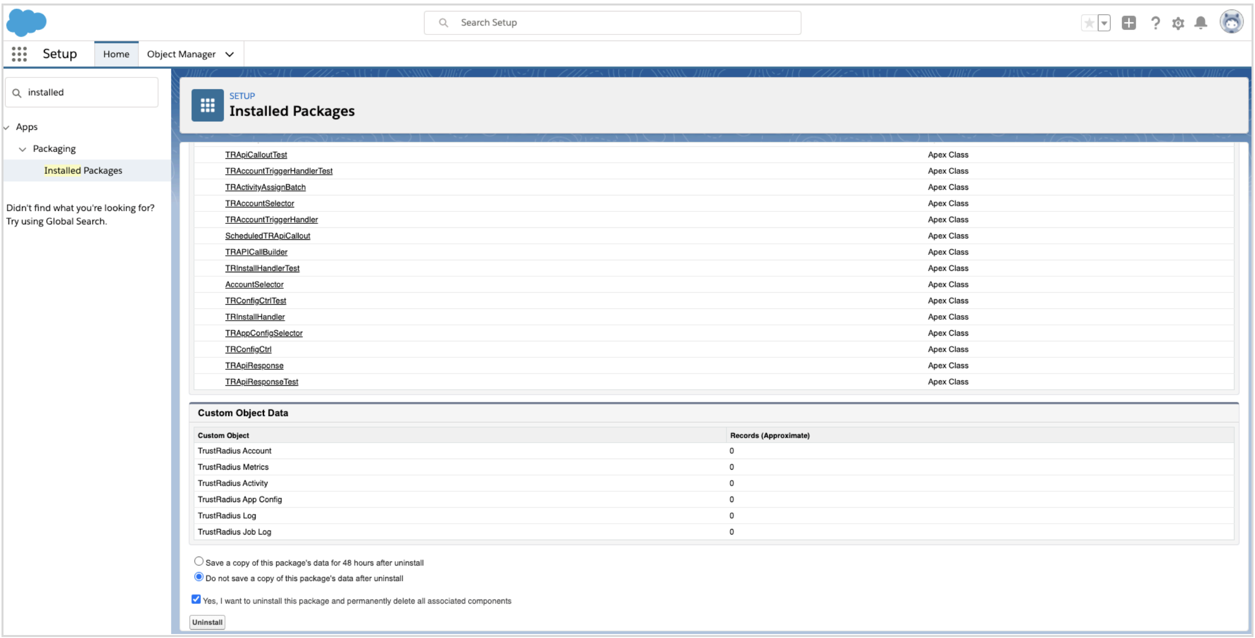
12. Navigate to your organization's Installed Packages.



13. Click "Uninstall" next to the TrustRadius App.



14. Scroll to the bottom of the page. You can choose to save a copy of the package for 48 hours or to not save a copy.
15. Check “Yes, I want to uninstall this package and permanently delete all associated components.”
16. Click “Uninstall”. Uninstalling the app may take several minutes.



17. To delete an Uninstalled Package, click the “Del” action next to the package.