



TrustRadius Connector Installation **and Configuration Guide**

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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.

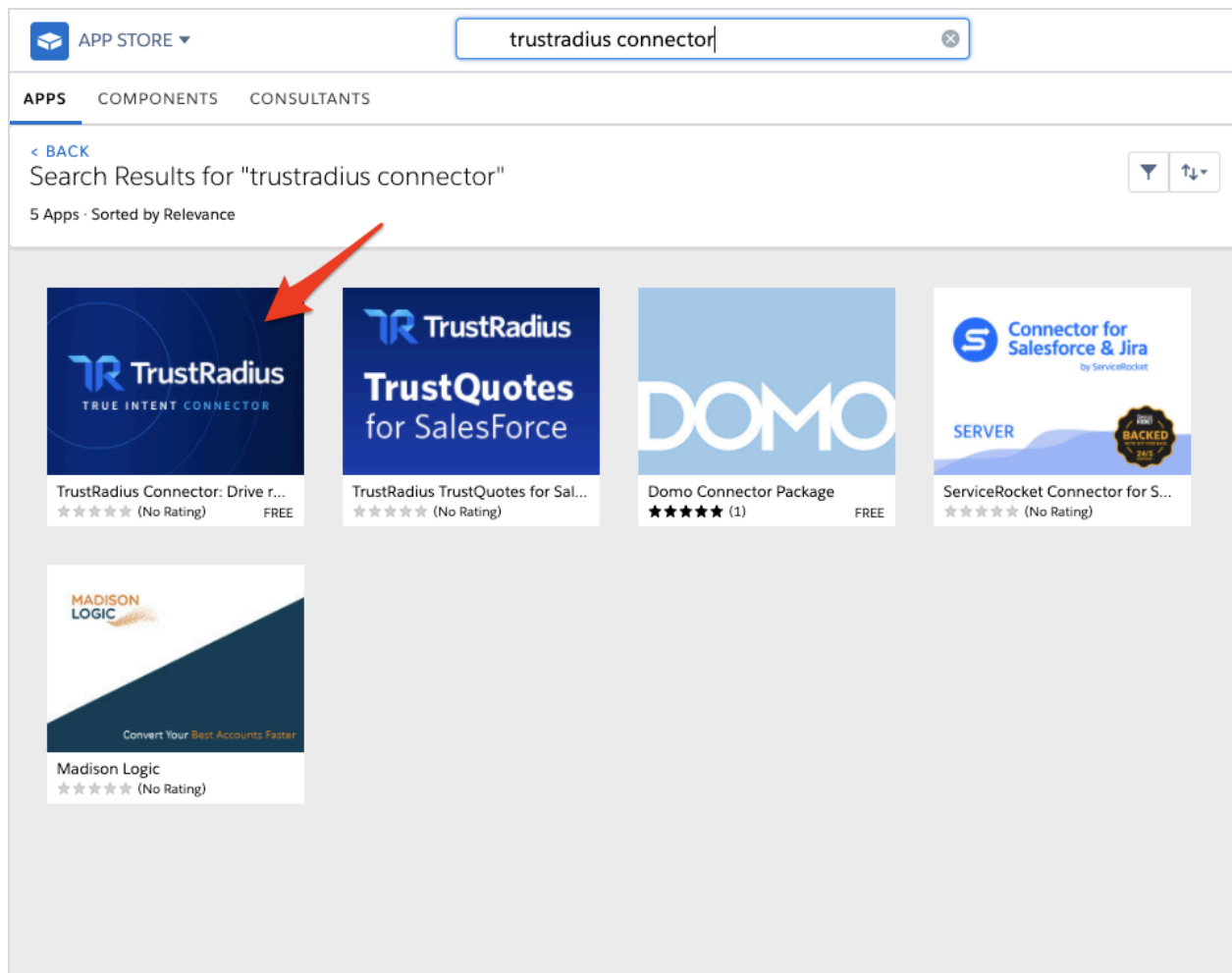
Guidelines and Prerequisites

- 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](#).

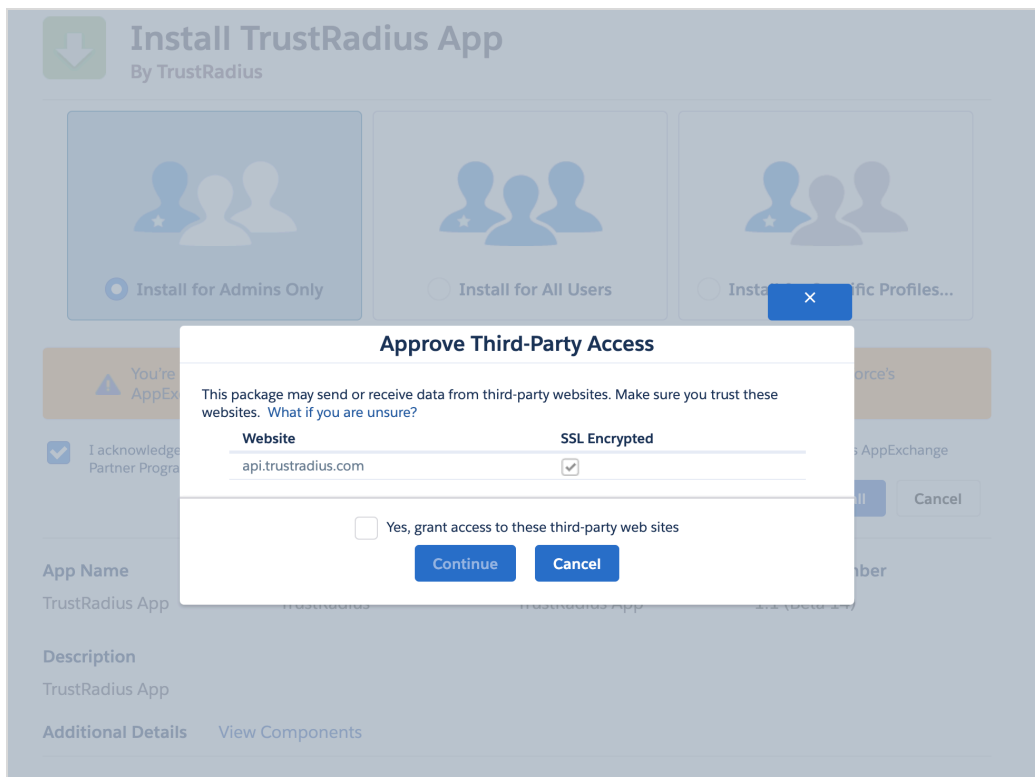
Step 1: Install the TrustRadius Connector

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.


 **Install TrustRadius App**
By TrustRadius


 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
TrustRadius App	TrustRadius	TrustRadius Connector	


[Additional Details](#) [View Components](#)

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

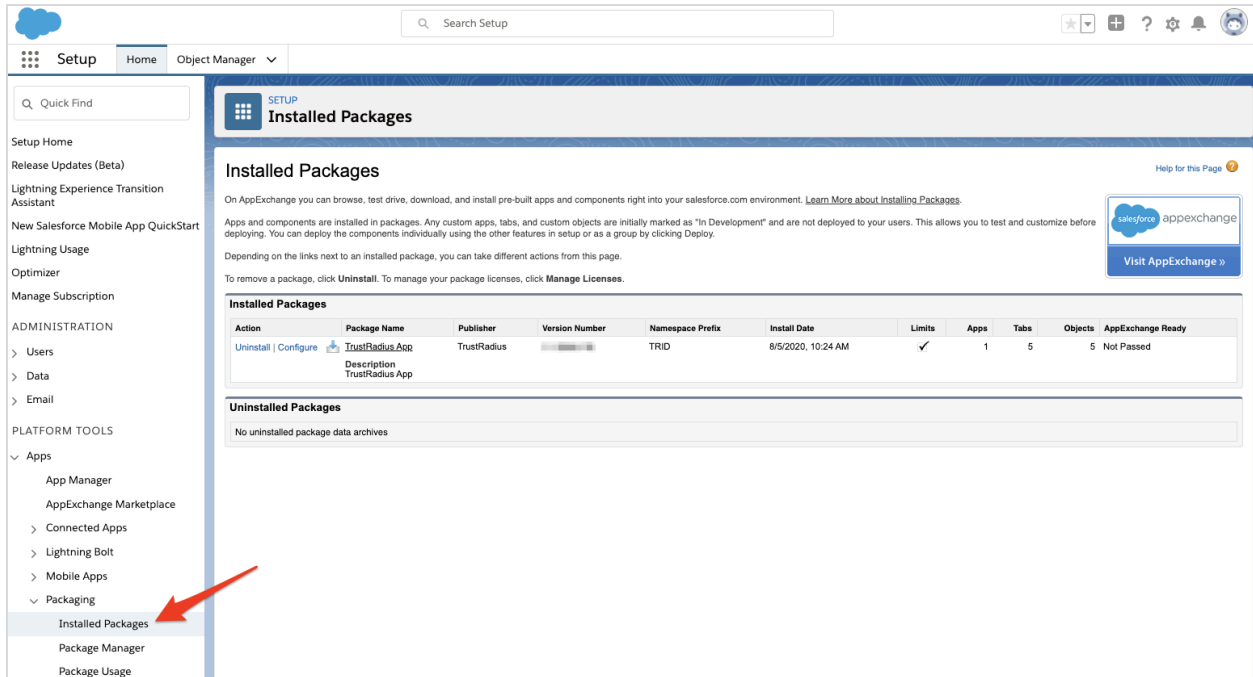
 **Install TrustRadius App**
By TrustRadius

 **Installation Complete!**

Done

App Name	Publisher	Version Name	Version Number
TrustRadius App	TrustRadius	TrustRadius Connector	

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with sections like Setup Home, ADMINISTRATION, and PLATFORM TOOLS. Under PLATFORM TOOLS, the 'Apps' section is expanded, and 'Packaging' is selected. A red arrow points to the 'Installed Packages' link in the sub-menu. The main content area displays the 'Installed Packages' page, which includes a table of installed packages and a section for uninstalled packages.



Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	 TrustRadius App	TrustRadius		TRID	8/5/2020, 10:24 AM	✓	1	5	5	Not Passed
Description TrustRadius App										

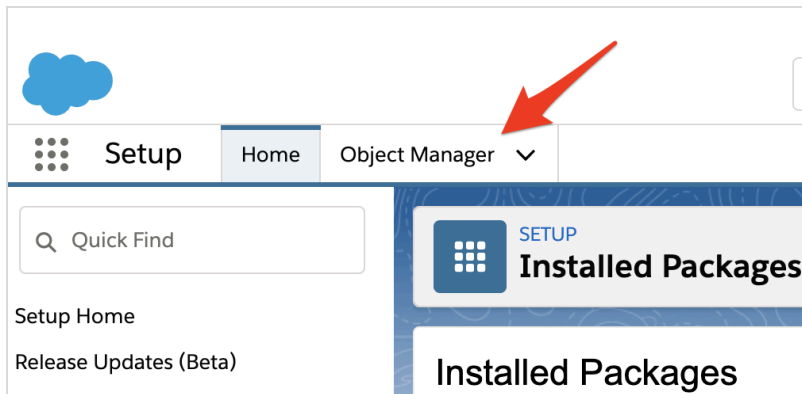
Uninstalled Packages

No uninstalled package data archives

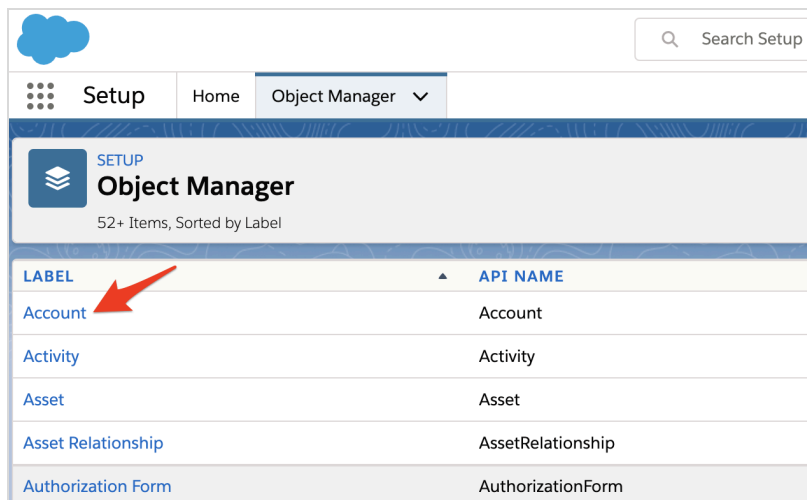
9. Before configuring the application, complete **Steps 2-5**.

Step 2: Configure the Account Page Layout

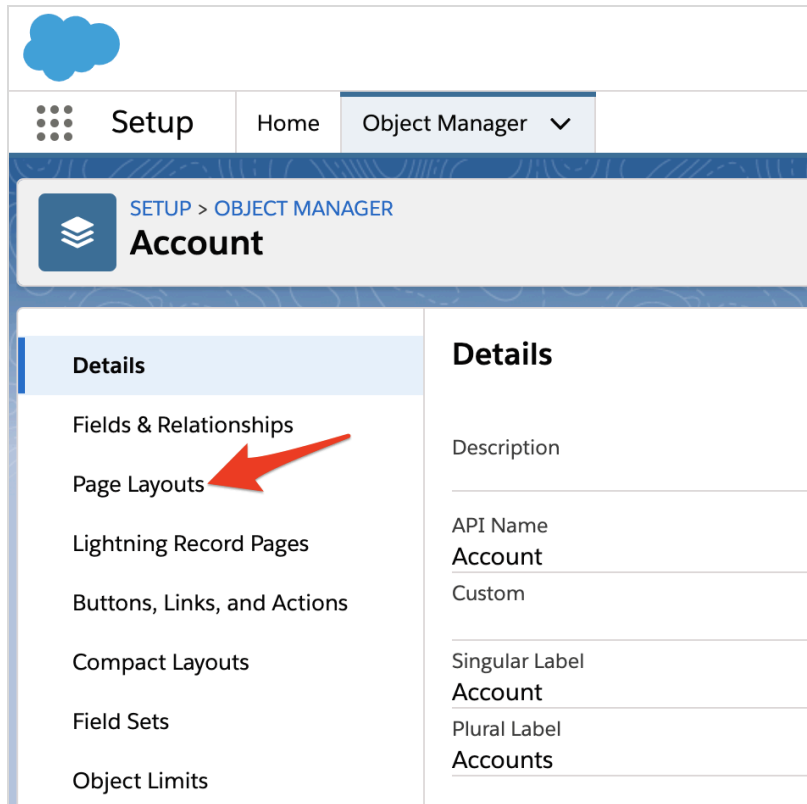
1. From the Setup page, click “Object Manager”.



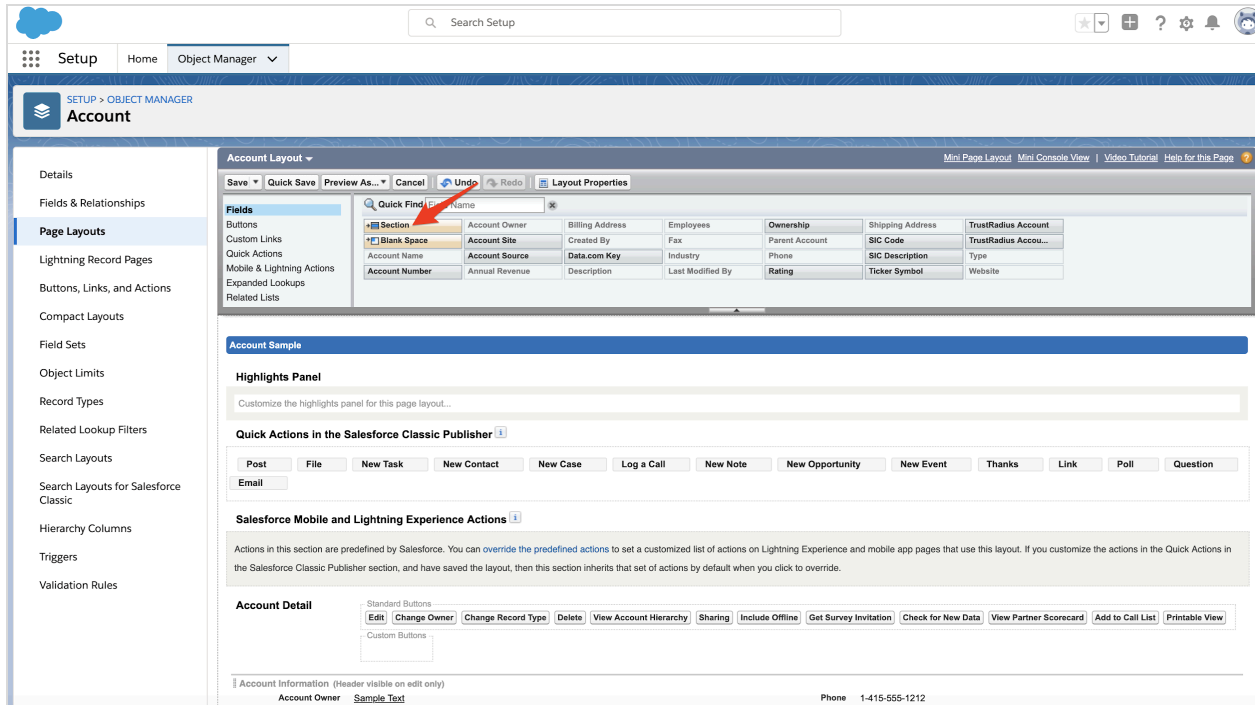
2. Click “Account”.



3. Click “Page Layouts”.



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



- Name the section "TrustRadius Account" and click "OK".

Section Properties

Section Name

Display Section Header On

- ☒ Detail Page
- ☒ Edit Page

Layout

☐ 1-Column
 ☒ 2-Column

Tab-key Order

☒ Left-Right
 ☐ Top-Down

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

The screenshot shows the Salesforce Account Page Layout editor. On the left, a sidebar lists various layout components: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Hierarchy Columns, Triggers, and Validation Rules. The main area displays the layout structure with sections like Description Information, Address Information, System Information, Custom Links, and TrustRadius Account. A red arrow points to the 'TrustRadius Account' section, which is currently blank.

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

The screenshot shows the same Salesforce Account Page Layout editor. A red arrow points to the 'TrustRadius Account' field in the 'Fields' list on the left. Another red arrow points to the 'TrustRadius Account' section in the layout structure on the right, indicating where the field is being dragged. The field is a lookup field, as indicated by the tooltip that appears when hovering over it: 'Label: TrustRadius Account', 'Name: TRID.TrustRadius_Account', 'Type: Lookup'.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

Buttons

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

System Information

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on detail only)

Google Search

Google Maps

Google News

TrustRadius Account

TrustRadius Account Sample Text

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

Setup Home Object Manager

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Components

Activities

Cases

Contact Point Emails

Content Deliveries

Groups

Orders

TrustRadius Accounts

Activity History

Communication Sub...

Contact Point Phones

Contracts

Notes & Attachments

Partners

TrustRadius Activ...

Assets

Community Members

Contact Roles

Data Integration ...

Open Activities

Social Personas

Campaigns

Contact Point Add...

Contacts

Files

Opportunities

Social Posts

Related Lists

Contacts

New Merge Contacts Add to Campaign

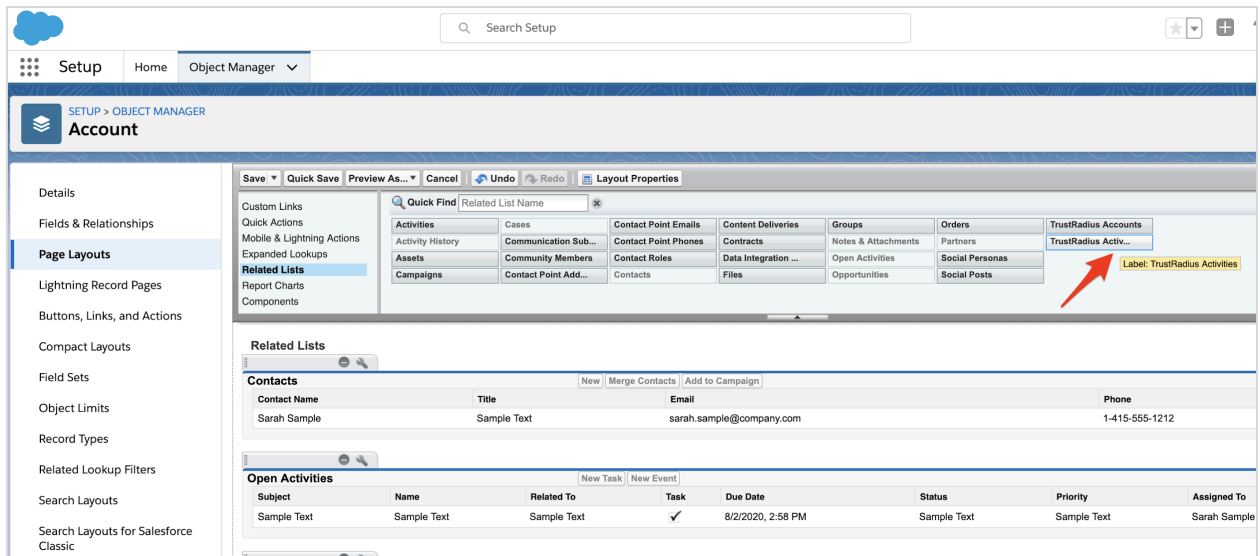
Contact Name	Title	Email	Phone
Sarah Sample	Sample Text	sarah.sample@company.com	1-415-555-1212

Open Activities

New Task New Event

Subject	Name	Related To	Task	Due Date	Status	Priority
Sample Text	Sample Text	Sample Text	✓	8/2/2020, 2:58 PM	Sample Text	Sample Text

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



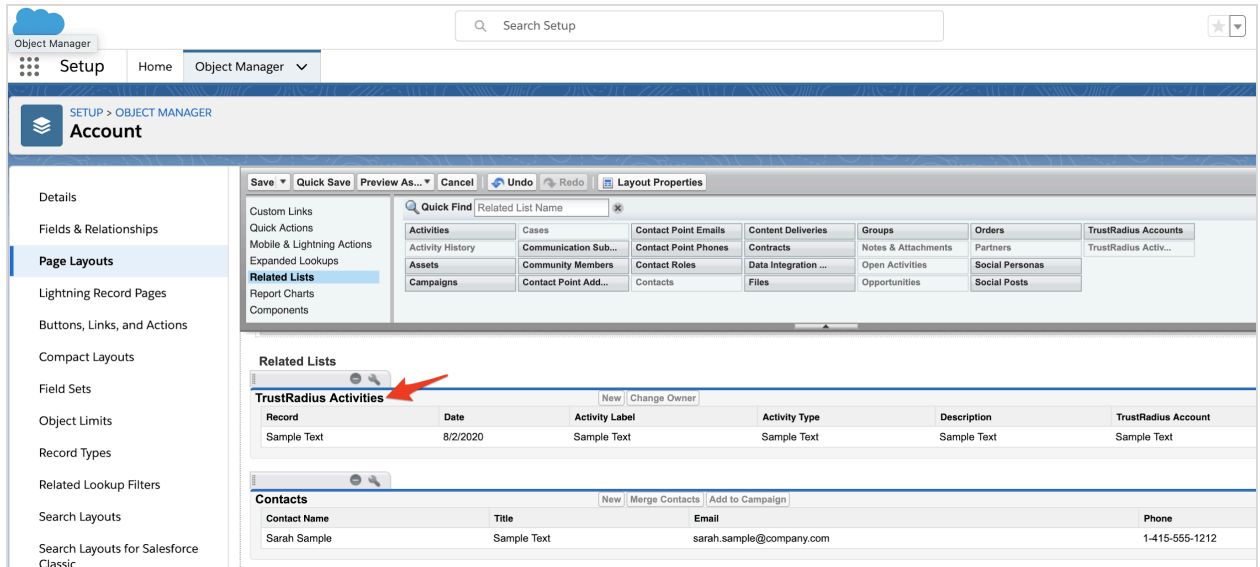
The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. The 'Account' object is chosen, and the 'Related Lists' section is expanded. A red arrow points to the 'TrustRadius Activities' related list in the 'Related Lists' section.

Related Lists

Contact Name	Title	Email	Phone
Sarah Sample	Sample Text	sarah.sample@company.com	1-415-555-1212

Open Activities

Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	Sample Text	✓	8/2/2020, 2:58 PM	Sample Text	Sample Text	Sarah Sample



The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. The 'Account' object is chosen, and the 'Related Lists' section is expanded. A red arrow points to the 'TrustRadius Activities' related list in the 'Related Lists' section.

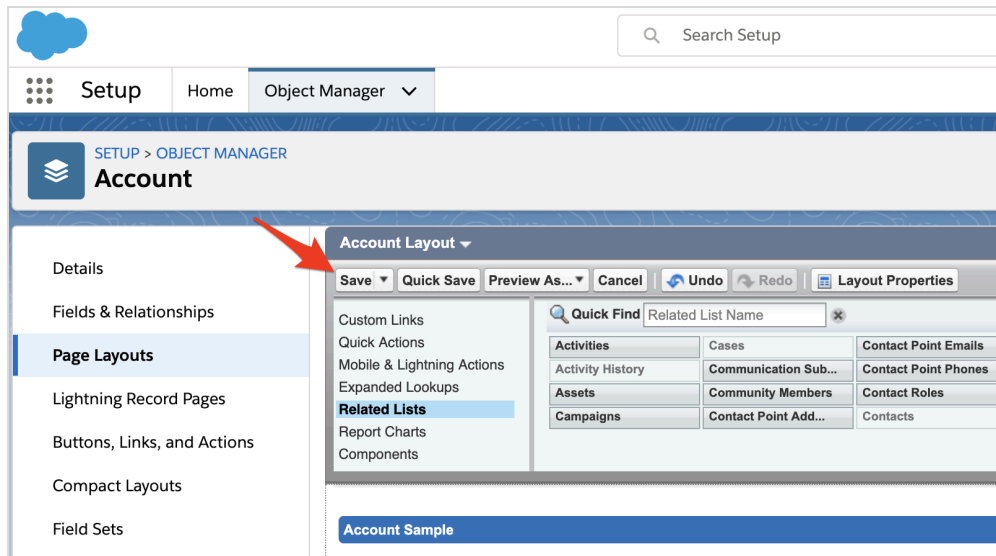
Related Lists

Record	Date	Activity Label	Activity Type	Description	TrustRadius Account
Sample Text	8/2/2020	Sample Text	Sample Text	Sample Text	Sample Text

Contacts

Contact Name	Title	Email	Phone
Sarah Sample	Sample Text	sarah.sample@company.com	1-415-555-1212

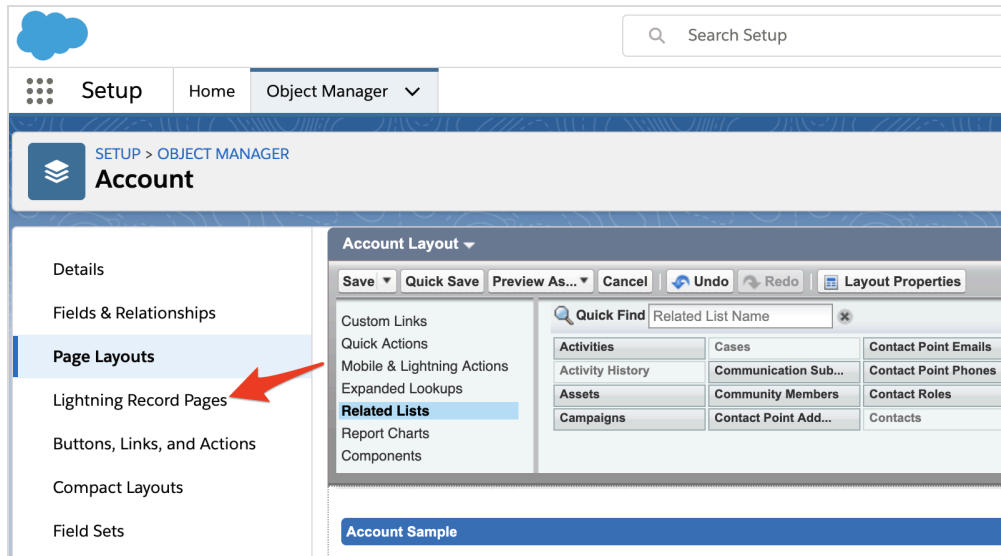
11. Click “Save”.



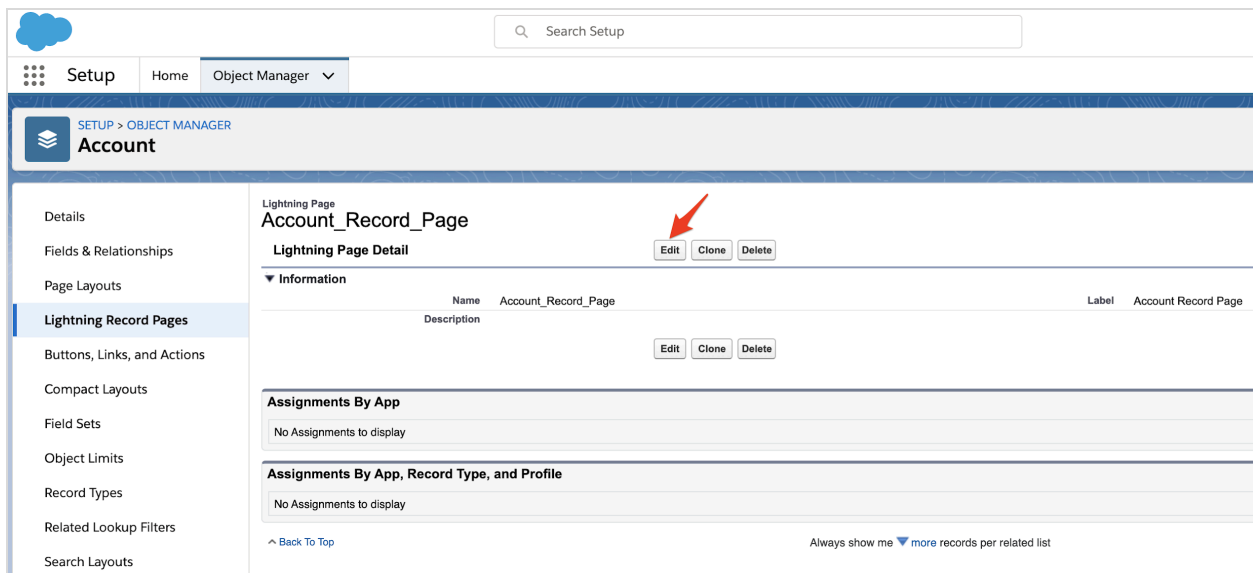
12. Configuring the Account Page Layout is now complete. Next, complete **Step 3: Configuring the Account Lightning Record Page**.

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”.



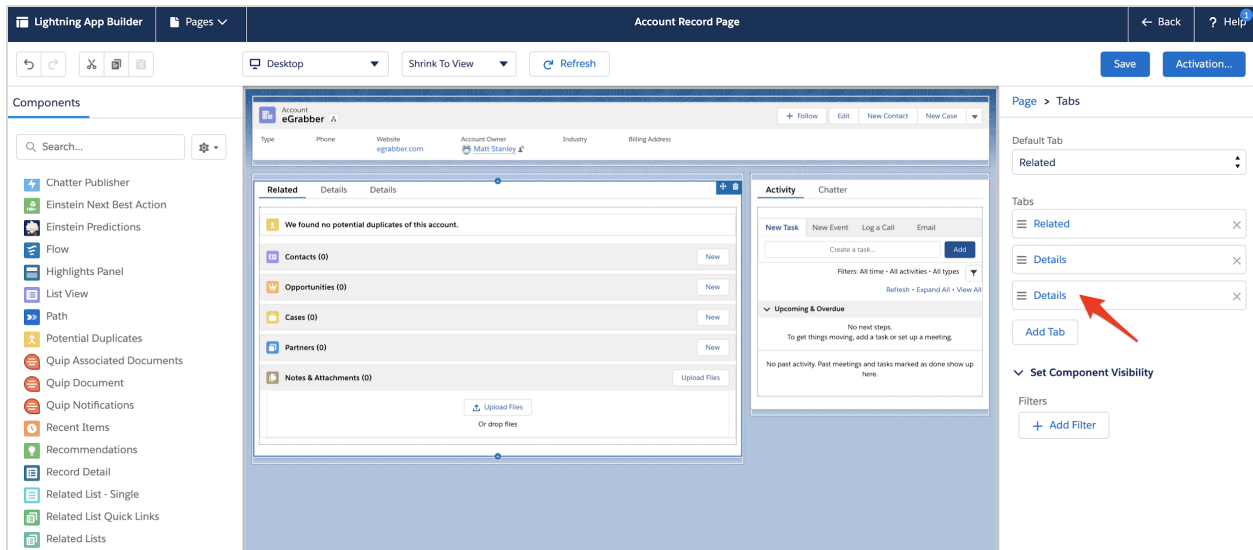
4. Select the Tabs section of the page.

The screenshot shows the Lightning App Builder interface for an 'Account Record Page'. The left sidebar contains a 'Components' list with various app components. The main canvas displays a preview of the page layout. A red arrow points to the 'Related' tab in the 'Related' section of the page layout. The right sidebar shows the 'Page > Tabs' configuration area, which includes a 'Default Tab' dropdown set to 'Related', a list of tabs ('Related', 'Details'), and an 'Add Tab' button.

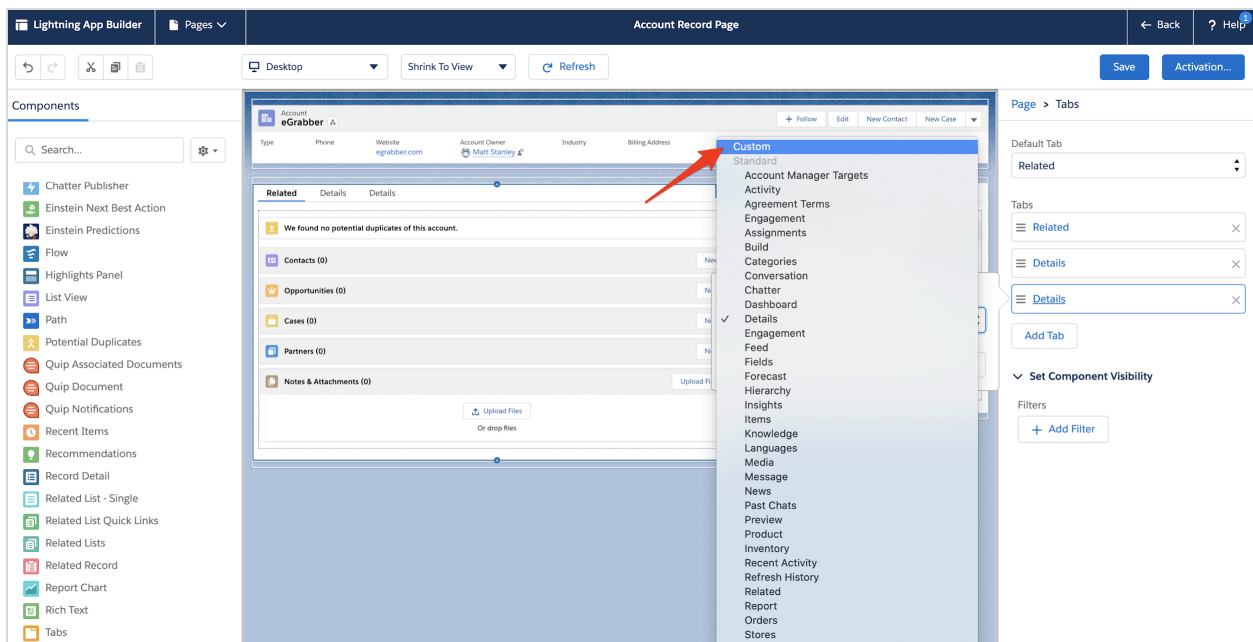
5. Click “Add Tab”.

The screenshot shows the Lightning App Builder interface for an 'Account Record Page'. The left sidebar contains a 'Components' list with various app components. The main canvas displays a preview of the page layout. A red arrow points to the 'Add Tab' button in the 'Page > Tabs' configuration area, which is located below the list of tabs ('Related', 'Details').

6. Select inside the newly created tab.



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



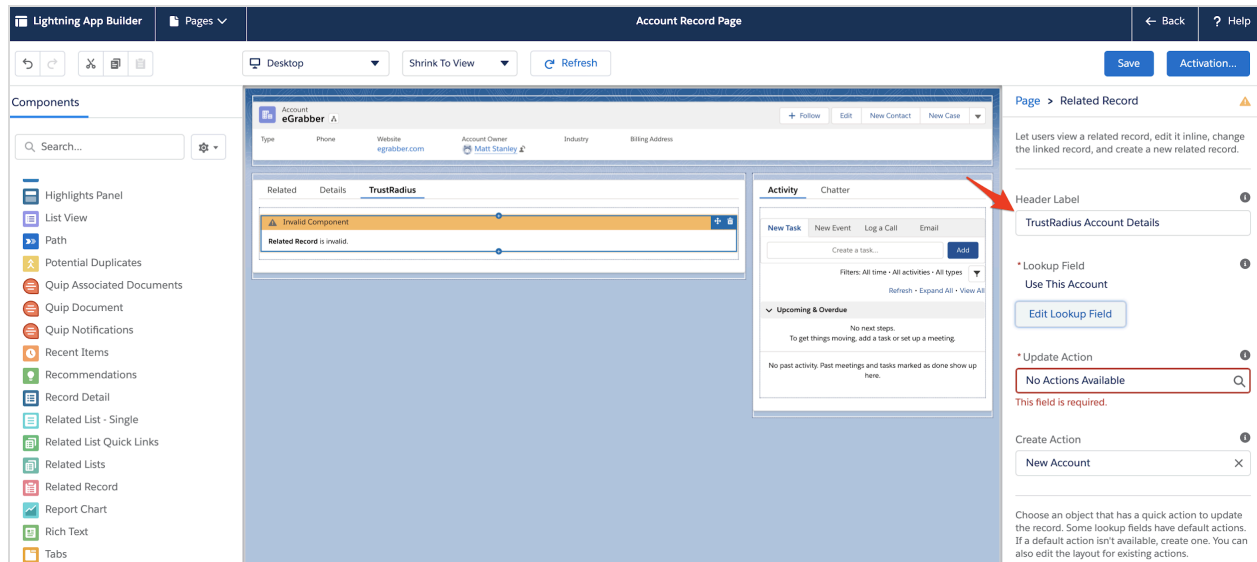
8. In the field Custom Label, name the tab “TrustRadius” and click “Done”.

The screenshot shows the Lightning App Builder interface for configuring a tab. On the left, the 'Tab Label' section has a dropdown menu set to 'Custom'. Below it, the '* Custom Label' field contains the text 'TrustRadius'. A 'Done' button is at the bottom right of this section. On the right, a preview of the tab shows the label 'TrustRadius' with a close button. Below the preview is an 'Add Tab' button. Further down, the 'Set Component Visibility' section is expanded, showing a 'Filters' section with an '+ Add Filter' button.

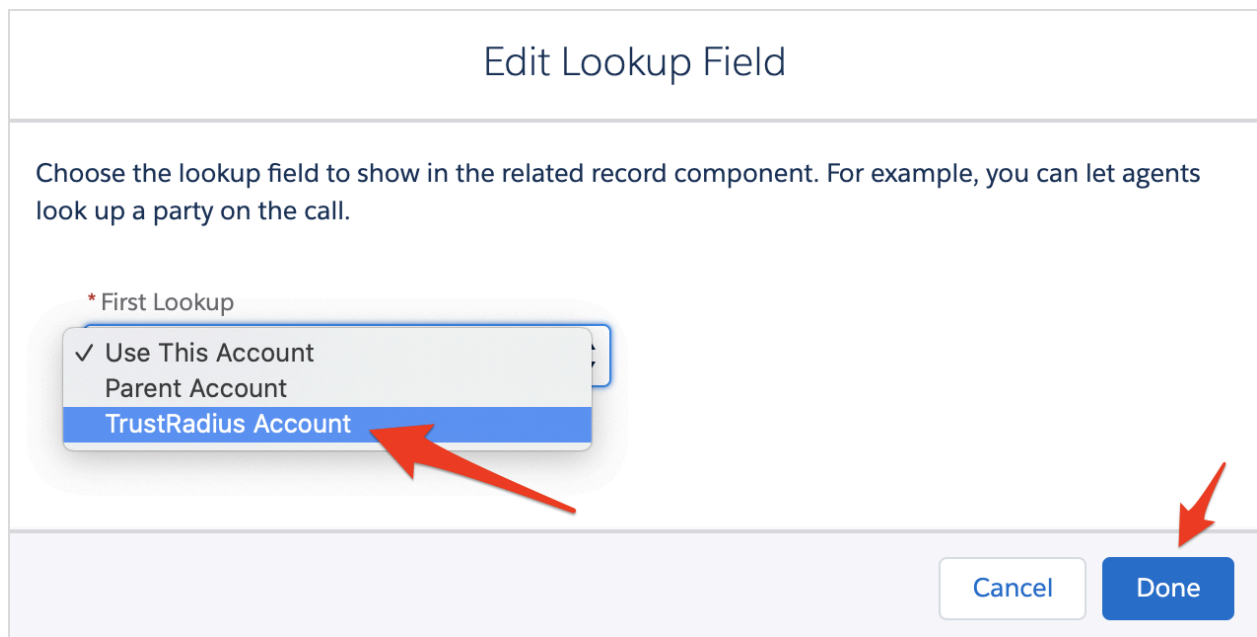
9. From the Standard Components list, drag a **Related Record** Component to the “TrustRadius” tab.

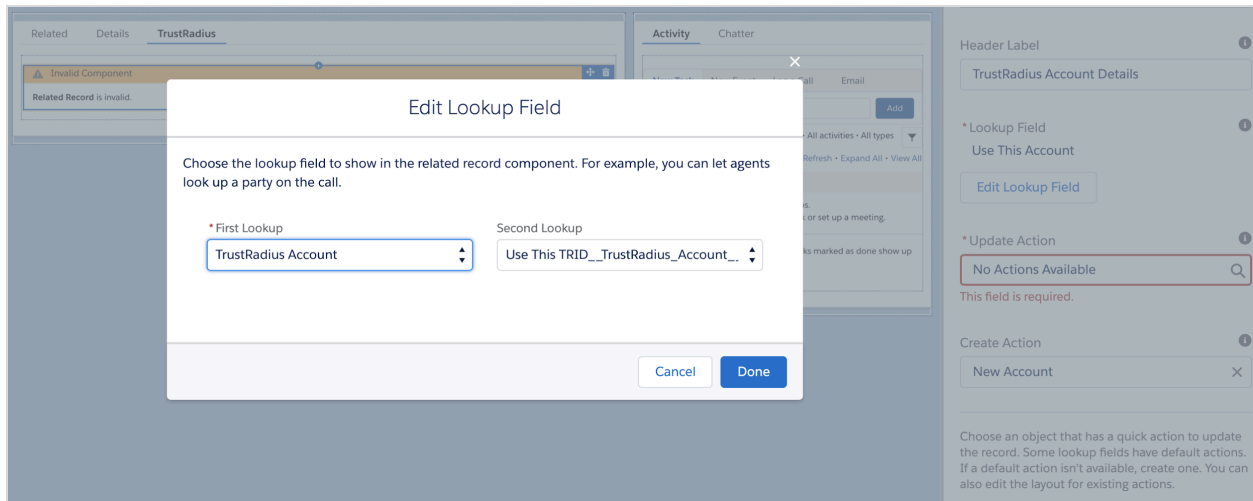
The screenshot shows the Lightning App Builder interface. On the left, the 'Components' panel is open, displaying a list of standard components. A red arrow points to the 'Related Record' component in this list. In the center, the 'Account Record Page' is shown in edit mode. The 'TrustRadius' tab is selected, and a red arrow points to the 'Related Record' component being dragged onto the tab's content area. The right sidebar shows the 'Activity' section with options for 'New Task', 'New Event', 'Log a Call', and 'Email'.

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

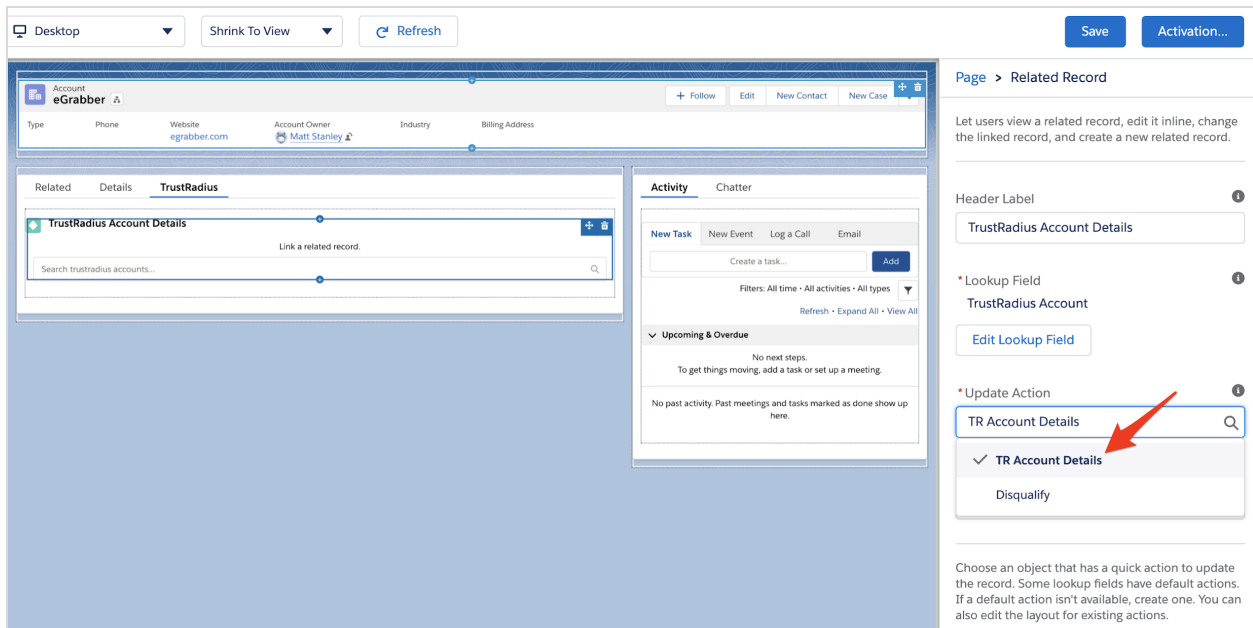


11. Select “Edit Lookup Field” and select “TrustRadius Account” from the dropdown menu. Click “Done”.

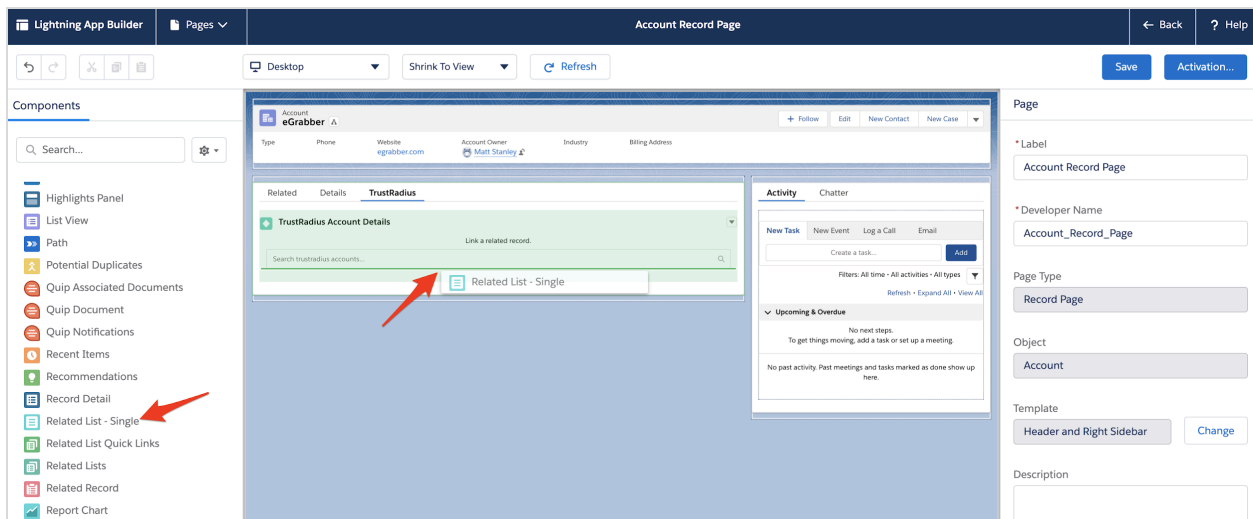




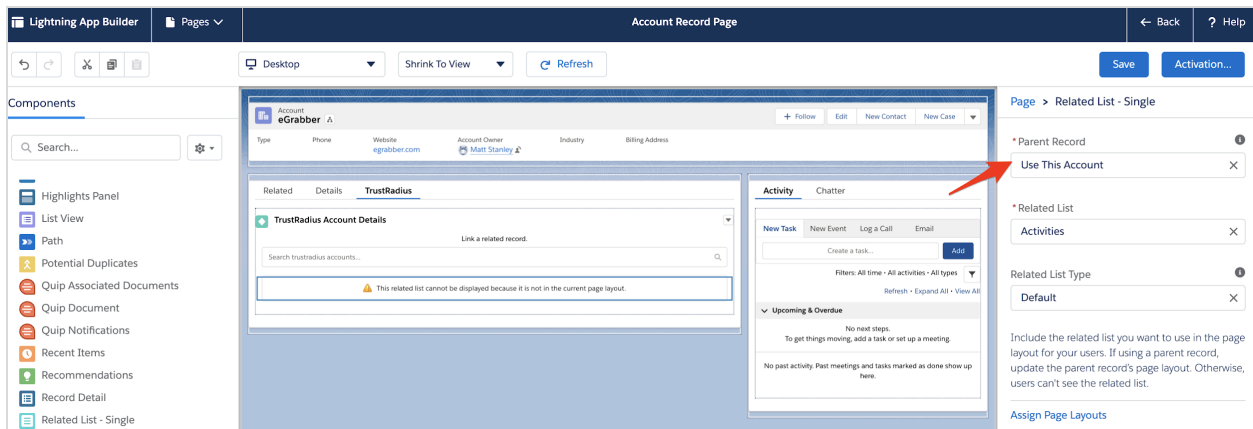
12. In the “Update Action” field select “TR Account Details”.



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”.



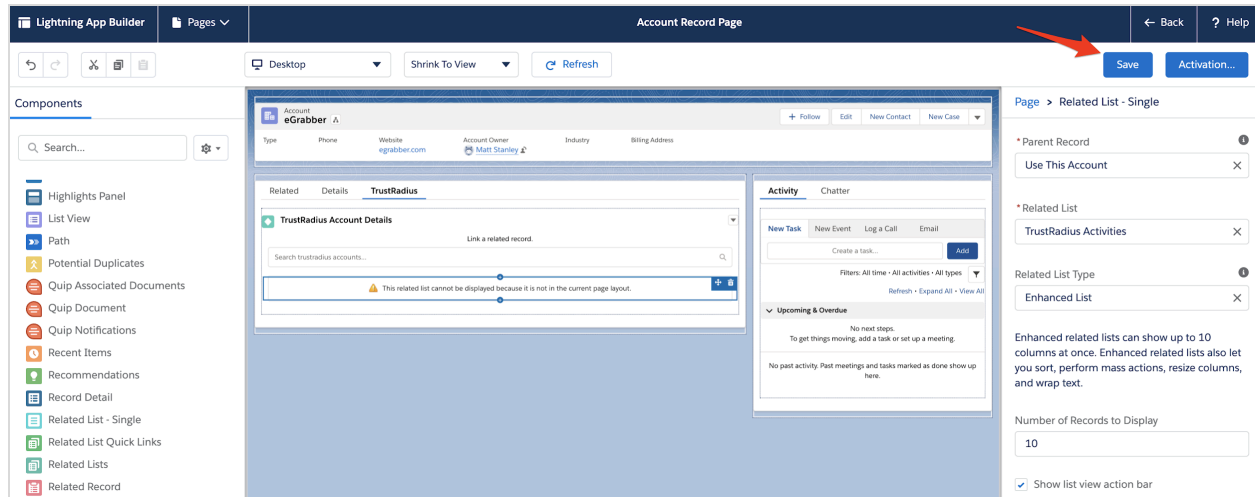
15. Select “TrustRadius Activities” from the Related List dropdown menu.

The screenshot shows the Lightning App Builder interface for an 'Account Record Page'. The 'Components' panel on the left lists various components, including 'Related List - Single'. The main canvas displays a preview of the account record page. On the right, the 'Page > Related List - Single' configuration panel is open. The 'Parent Record' is set to 'Use This Account'. The 'Related List' dropdown menu is open, showing a search bar and a list of options. 'TrustRadius Activities' is selected, indicated by a red arrow.

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

The screenshot shows the Lightning App Builder interface for an 'Account Record Page'. The 'Components' panel on the left lists various components, including 'Related List - Single'. The main canvas displays a preview of the account record page. On the right, the 'Page > Related List - Single' configuration panel is open. The 'Parent Record' is set to 'Use This Account'. The 'Related List' dropdown menu is open, showing a search bar and a list of options. 'TrustRadius Activities' is selected. Below this, the 'Related List Type' dropdown menu is open, showing a search bar and a list of options. 'Enhanced List' is selected, indicated by a red arrow.

17. Click “Save”.

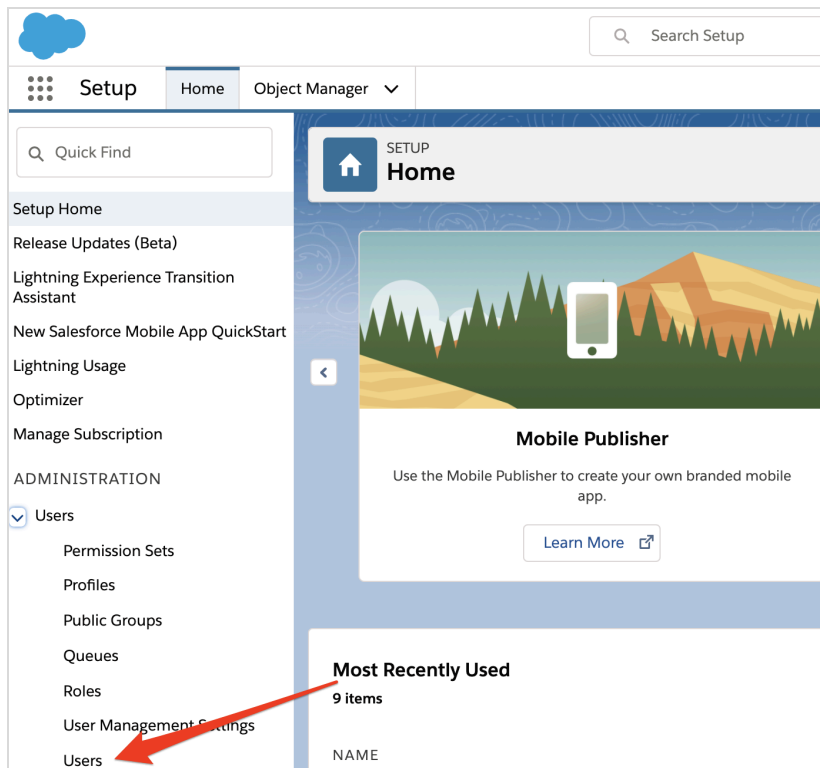


18. Configuring the Lightning Record Page is now complete. Next, complete **Step 4: Setting up User Permissions**. User permissions can be set at the individual user level, or can be added to multiple users simultaneously - see separate instructions below for each use case.

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”.

The screenshot displays the TrustRadius Setup interface for the 'Users' section. The left sidebar contains navigation links for Setup Home, Release Updates (Beta), Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION (Users, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS, and Apps. The main content area shows the 'Users' page with a search bar and a list of users. The 'Permission Set Assignments' section is highlighted, showing a table with columns for 'Permission Set Assignments' and 'Edit Assignments'. A red arrow points to the 'Edit Assignments' button. Below this section are 'Permission Set Assignments: Activation Required', 'Permission Set License Assignments', 'Lightning Data Purchase Assignments', and 'Personal Groups' sections, each with an 'Edit Assignments' button. The 'Personal Groups' section also includes a 'New Group' button.

Setup Home
Release Updates (Beta)
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
Manage Subscription
ADMINISTRATION
Users
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Data
Email
PLATFORM TOOLS
Apps

Search Setup

Used Data Space 964 KB [View]
Used File Space 5 KB [View]
Last Login 8/2/2020, 2:16 PM
Last Password Change or Reset 7/28/2020, 1:11 PM
Failed Login Attempts 0 [1]
Individual
Created By Pete DeLine, 7/28/2020, 10:51 AM
Modified By Matt Stanley, 7/28/2020, 1:11 PM
Edit Sharing Change Password

Permission Set Assignments Edit Assignments Permission Set Assignments Help (?)
No records to display

Permission Set Assignments: Activation Required Edit Assignments Permission Set Assignments: Activation Required Help (?)
No records to display

Permission Set License Assignments Edit Assignments Permission Set License Assignments Help (?)
No records to display

Lightning Data Purchase Assignments Edit Assignments
No purchase assignments

Personal Groups New Group Personal Groups Help (?)
No personal groups specified

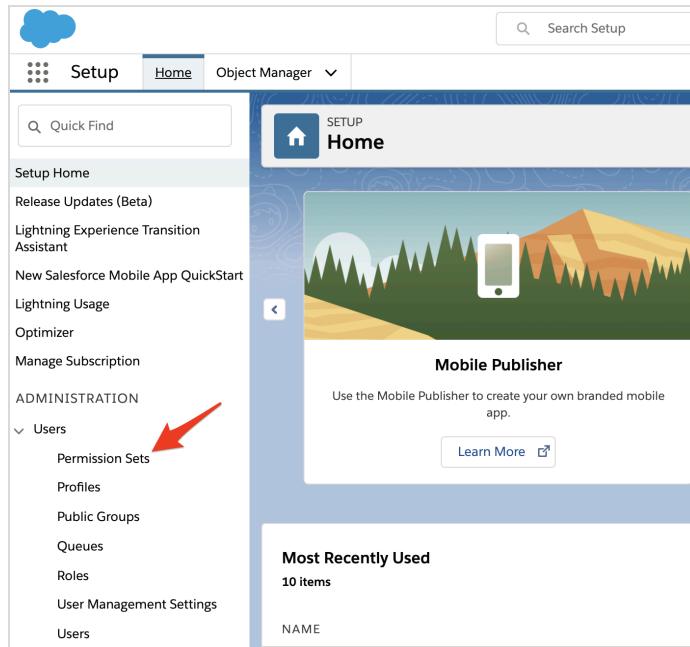
4. Select the appropriate role from the Available Permission Sets and click “Add” to move it to Enabled Permission Sets.
5. Click “Save”.

The screenshot displays the Salesforce Setup interface for configuring permission sets for a user named Matt Stanley. The interface is divided into a left sidebar and a main content area. The sidebar contains a 'Quick Find' search bar and a list of navigation links under the 'Setup' tab, including 'Setup Home', 'Release Updates (Beta)', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', 'Manage Subscription', 'ADMINISTRATION', 'Users', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. The main content area is titled 'Permission Sets' and shows 'Permission Set Assignments' for Matt Stanley. It features two lists: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Available Permission Sets' list includes 'CRM User', 'Salesforce CMS Integration Admin', 'Salesforce Console User', 'Standard Einstein Activity Capture', 'TrustRadius Read Only', and 'TrustRadius User'. The 'Enabled Permission Sets' list contains 'TrustRadius Admin'. A red arrow points to the 'Add' button between the two lists. The interface also includes 'Save' and 'Cancel' buttons at the top and bottom of the configuration area.

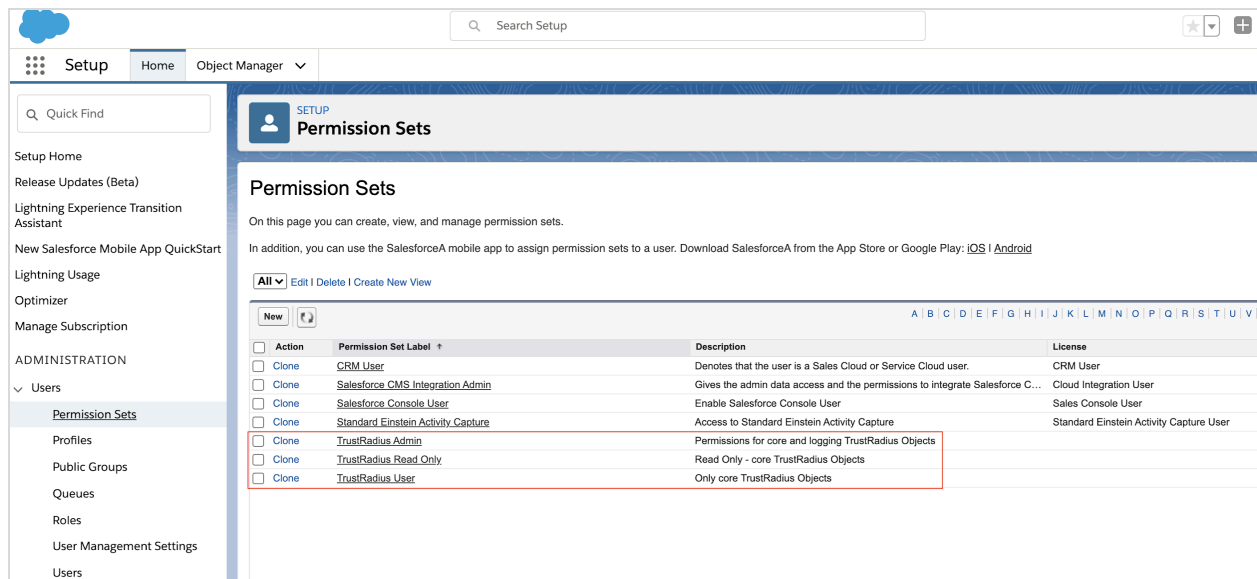
6. Once you have assigned the “TrustRadius Admin” permission set, that user can complete the steps in **Configuring the TrustRadius App**.

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”.

The screenshot shows the TrustRadius Admin interface. The left sidebar contains navigation links: Setup Home, Release Updates (Beta), Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION, Users, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Data, Email, PLATFORM TOOLS, Apps, Feature Settings, Einstein, and Objects and Fields. The main content area is titled 'Permission Sets' and shows the 'TrustRadius Admin' permission set. A red arrow points to the 'Manage Assignments' button. Below this, the 'Permission Set Overview' section displays details: Description (Permissions for core and logging TrustRadius Objects), License, Session Activation Required (checkbox), Last Modified By (Matt Stanley, 8/2/2020, 2:42 PM), API Name (TrustRadius_Admin), Namespace Prefix (TRID), and Created By (Matt Stanley, 8/2/2020, 2:42 PM). The 'Apps' section lists various permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Credential Access, Custom Permissions, and Custom Metadata Types.

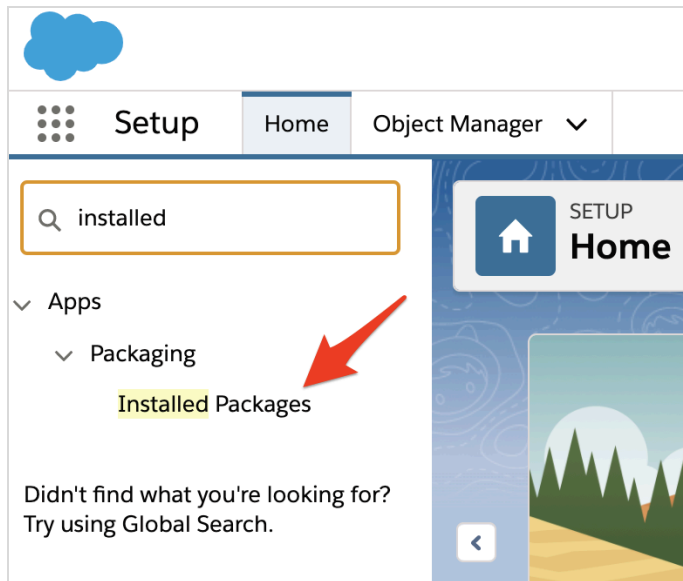
4. Click “Add Assignments”.

The screenshot shows the TrustRadius Admin interface. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Permission Sets' and shows the 'TrustRadius Admin' permission set. A red arrow points to the 'Add Assignments' button. Below this, the 'Assigned Users' section displays a table of users assigned to the permission set. The table has columns: Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The table contains one row for 'Stanley, Matt' with the username 'matt.stanley@trustradius.com.trusttestpe' and the role 'System Administrator'. The 'Add Assignments' button is highlighted with a red arrow.

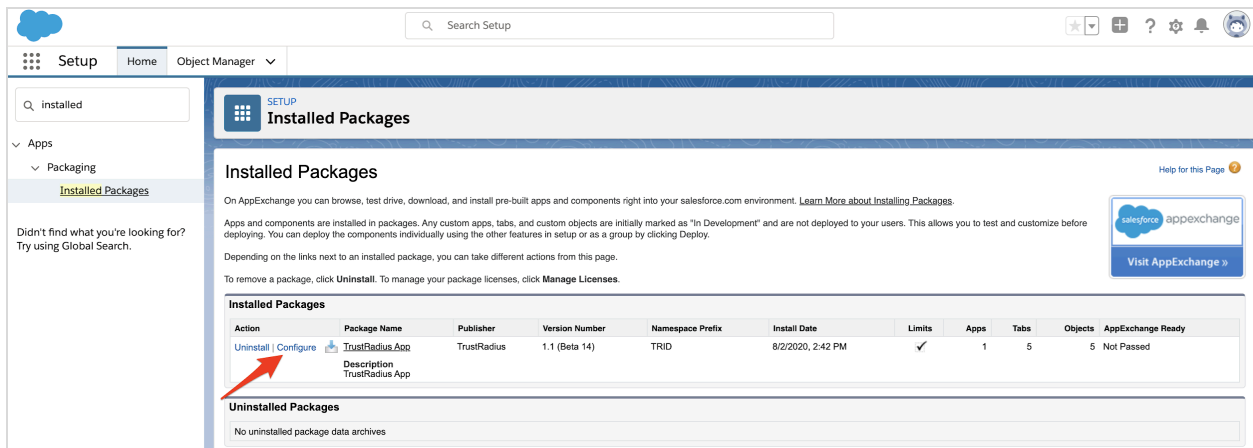
5. Select the Users in your organization to assign the permission and click “Assign”.

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”.

The screenshot shows the 'TrustRadius App Config' page in Salesforce Setup. The 'TrustRadius App Config Detail' section contains the following information:

Label	Default	Protected Component
Custom Metadata Record Name	Default	<input type="checkbox"/>
Advanced Metrics	<input checked="" type="checkbox"/>	Namespace Prefix
Task Creation	<input checked="" type="checkbox"/>	TRID
Chatter Creation	<input checked="" type="checkbox"/>	
Run TRAccountTrigger	<input checked="" type="checkbox"/>	
Run AccountTrigger	<input checked="" type="checkbox"/>	
Endpoint	https://api.trustradius.com/v1	
API key		
Created By	Matt Stanley, 8/10/2020, 6:25 AM	
Last Modified By	Matt Stanley, 8/10/2020, 6:25 AM	

Below the details, there is a 'Schedule Apex Jobs' section with a 'Schedule Daily Jobs' button. At the bottom, the 'TrustRadius API Run' section shows start and end dates (6/26/2020, 5:00 PM to 8/9/2020, 5:00 PM) and a 'Start Job' button. A red arrow points to the 'Edit' button in the 'TrustRadius App Config Detail' section.

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

The screenshot shows the 'TrustRadius App Config (Managed)' page in Salesforce Setup. The 'Information' section contains the following information:

Label	Value	Namespace Prefix
TrustRadius App Config Name	Default	TRID
Advanced Metrics	<input checked="" type="checkbox"/>	
Task Creation	<input checked="" type="checkbox"/>	
Chatter Creation	<input checked="" type="checkbox"/>	
Run TRAccountTrigger	<input checked="" type="checkbox"/>	
Run AccountTrigger	<input checked="" type="checkbox"/>	
Endpoint	https://api.trustradius.com	
API key	[Redacted]	

A red arrow points to the 'API key' field. The 'Save' button is visible at the bottom right.

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.

The screenshot displays the 'TrustRadius App Config' page in the Salesforce interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'TrustRadius App Config' and contains a 'TrustRadius App Config Detail' section with an 'Edit' button. This section lists several settings, all of which are checked: 'Advanced Metrics', 'Task Creation', 'Chatter Creation', 'Run TRAccountTrigger', and 'Run AccountTrigger'. The 'Endpoint' is set to 'https://api.trustradius.com/v1'. Below the settings is a 'Schedule Apex Jobs' section with a red arrow pointing to the 'Schedule Daily Jobs' button. At the bottom is the 'TrustRadius API Run' section, which includes 'Start Date' and 'End Date' pickers, both set to '6/26/2020, 5:00 PM' and '8/9/2020, 5:00 PM' respectively, and a 'Start Job' button.

TrustRadius App Config

TrustRadius App Config Detail

Label	Default	Protected Component
Custom Metadata Record Name	Default	<input type="checkbox"/>
Advanced Metrics	<input checked="" type="checkbox"/>	Namespace Prefix
Task Creation	<input checked="" type="checkbox"/>	TRID
Chatter Creation	<input checked="" type="checkbox"/>	
Run TRAccountTrigger	<input checked="" type="checkbox"/>	
Run AccountTrigger	<input checked="" type="checkbox"/>	
Endpoint	https://api.trustradius.com/v1	
API key		
Created By	Matt Stanley, 8/10/2020, 6:25 AM	Last Modified By
		Matt Stanley, 8/10/2020, 6:30 AM

Schedule Apex Jobs

Daily Job has been scheduled.

TrustRadius API Run

Start Date: 6/26/2020, 5:00 PM (8/10/2020, 6:33 AM)

End Date: 8/9/2020, 5:00 PM (8/10/2020, 6:33 AM)

Start Job

- 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.

TrustRadius App Config

TrustRadius App Config Detail

Label	Default	Protected Component
Custom Metadata Record Name	Default	<input type="checkbox"/>
Advanced Metrics	<input checked="" type="checkbox"/>	Namespace Prefix
Task Creation	<input checked="" type="checkbox"/>	TRID
Chatter Creation	<input checked="" type="checkbox"/>	
Run TRAccountTrigger	<input checked="" type="checkbox"/>	
Run AccountTrigger	<input checked="" type="checkbox"/>	
Endpoint	https://api.trustradius.com/v1	
API key		
Created By	Matt Stanley, 8/10/2020, 6:25 AM	Last Modified By
		Matt Stanley, 8/10/2020, 6:30 AM

Schedule Apex Jobs

Daily Job has been scheduled.

TrustRadius API Run

Start Date: 6/26/2020, 5:00 PM (8/10/2020, 6:33 AM)

End Date: 8/9/2020, 5:00 PM (8/10/2020, 6:33 AM)


Start Job


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.

TrustRadius API Run

[TrustRadius Logs \[1\]](#)

TrustRadius Job Log Detail

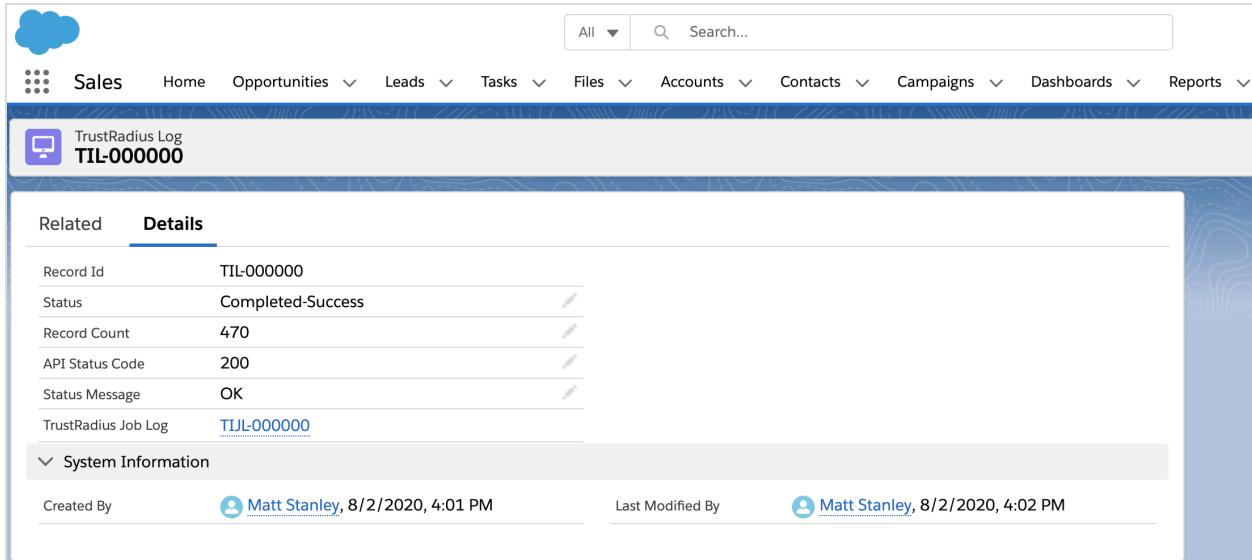
TrustRadius Job Log Name	TIJL-000000	Owner	 Matt Stanley [Change]
Start Date	6/18/2020, 5:00 PM		
Stop Date	8/1/2020, 5:00 PM		
Is Success	<input checked="" type="checkbox"/>		
Is Completed	<input checked="" type="checkbox"/>		
Created By	Matt Stanley , 8/2/2020, 4:01 PM	Last Modified By	Matt Stanley , 8/2/2020, 4:02 PM

 **TrustRadius Logs**

Action	Record Id
Edit Del	TIL-000000
Edit Del	TIL-000001

[^ Back To Top](#) Always show me [more](#) records per related list

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



The screenshot shows the TrustRadius Log TIL-000000 details page. The page has a navigation bar with links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. Below the navigation bar is a header section with the TrustRadius Log icon and the text "TrustRadius Log TIL-000000". The main content area is divided into two tabs: "Related" and "Details". The "Details" tab is active, showing a table with the following information:

Record Id	TIL-000000
Status	Completed-Success
Record Count	470
API Status Code	200
Status Message	OK
TrustRadius Job Log	TIJL-000000

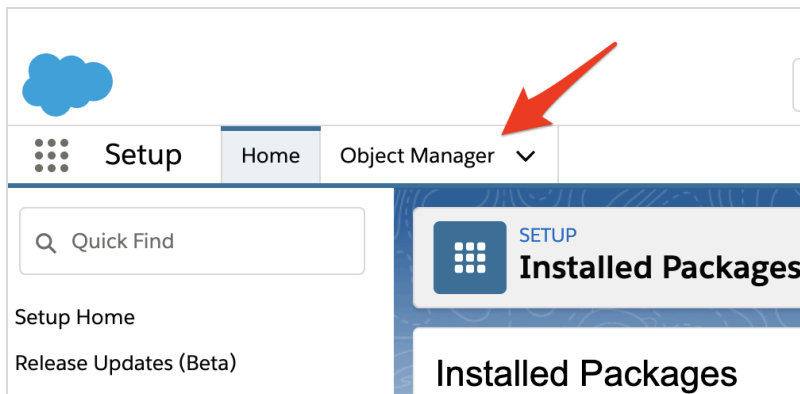
Below the table is a section titled "System Information" with a dropdown arrow. It contains two rows: "Created By" and "Last Modified By". Both rows show the user "Matt Stanley" and the timestamp "8/2/2020, 4:01 PM" and "8/2/2020, 4:02 PM" respectively.

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

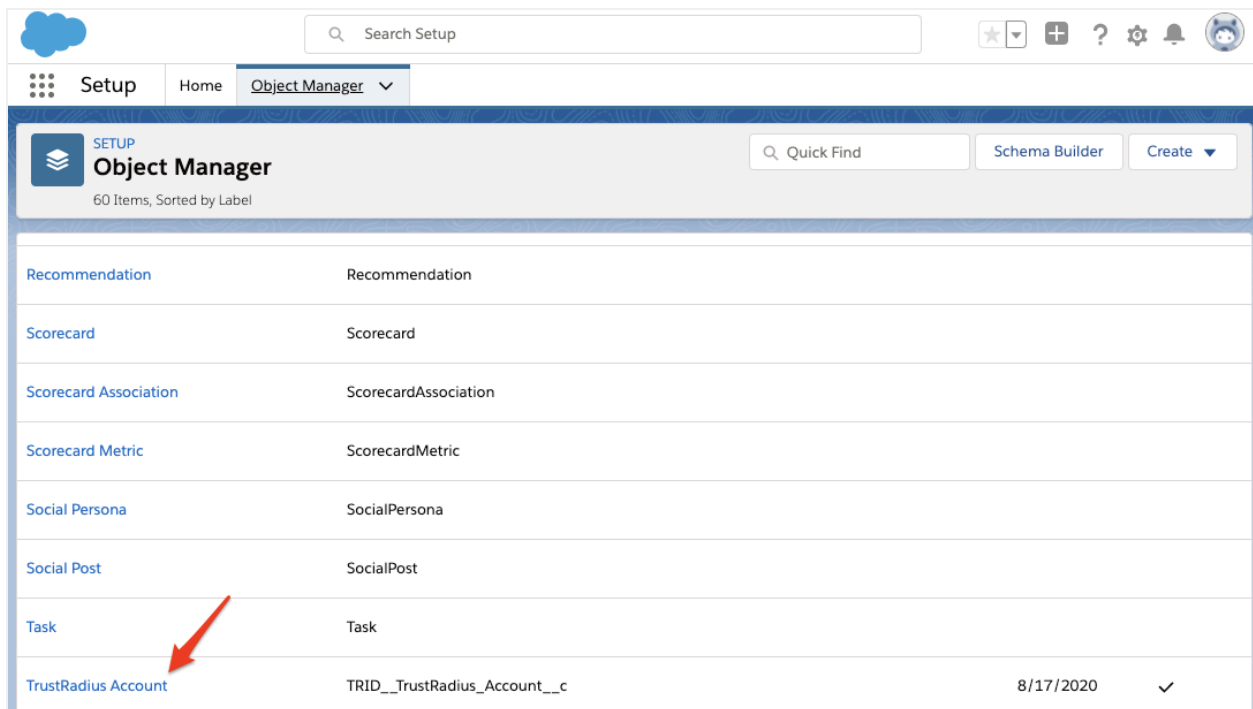
Step 6: Set up Chatter on the TrustRadius Account Object

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

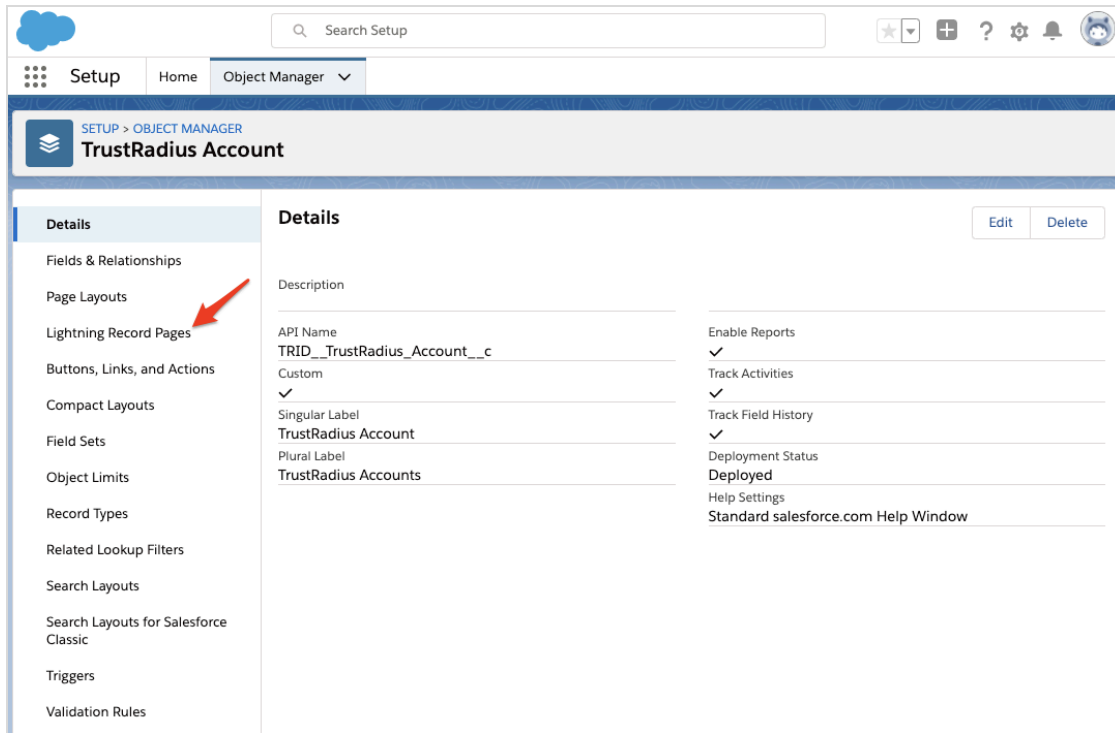
1. From the Setup page, click “Object Manager”.



2. Click “TrustRadius Account”.



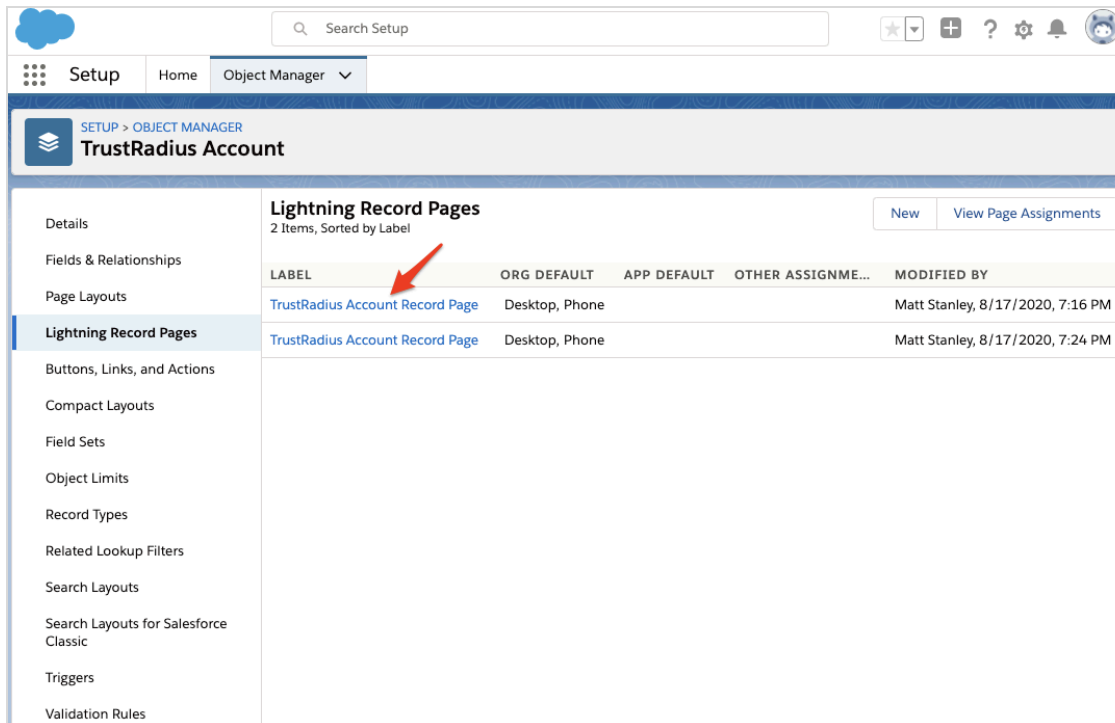
3. Click “Lightning Record Pages”.



The screenshot shows the Salesforce Setup interface for the TrustRadius Account. The left sidebar lists various setup options, with 'Lightning Record Pages' highlighted by a red arrow. The main content area shows the details for the TrustRadius Account, including API Name, Singular Label, Plural Label, and various settings like Enable Reports, Track Activities, and Deployment Status.

Details	Details
Fields & Relationships	Description
Page Layouts	API Name
Lightning Record Pages	TRID__TrustRadius_Account__c
Buttons, Links, and Actions	Custom
Compact Layouts	✓
Field Sets	Singular Label
Object Limits	TrustRadius Account
Record Types	Plural Label
Related Lookup Filters	TrustRadius Accounts
Search Layouts	Enable Reports
Search Layouts for Salesforce Classic	✓
Triggers	Track Activities
Validation Rules	✓
	Track Field History
	✓
	Deployment Status
	Deployed
	Help Settings
	Standard salesforce.com Help Window

4. Click “TrustRadius Account Record Page”.



The screenshot shows the Salesforce Setup interface for the TrustRadius Account, specifically the Lightning Record Pages section. The left sidebar lists various setup options, with 'Lightning Record Pages' highlighted by a red arrow. The main content area shows a table of Lightning Record Pages for the TrustRadius Account, with two entries: 'TrustRadius Account Record Page' for Desktop and Phone, created by Matt Stanley on 8/17/2020 at 7:16 PM and 7:24 PM.

Lightning Record Pages				
2 Items, Sorted by Label				
LABEL	ORG DEFAULT	APP DEFAULT	OTHER ASSIGNE...	MODIFIED BY
TrustRadius Account Record Page	Desktop, Phone			Matt Stanley, 8/17/2020, 7:16 PM
TrustRadius Account Record Page	Desktop, Phone			Matt Stanley, 8/17/2020, 7:24 PM

5. Click on “Clone”.

The screenshot shows the 'TrustRadius Account Record Page (Managed)' in the Object Manager. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area shows the 'Lightning Page Detail' section with a 'Clone' button highlighted by a red arrow. Below this, there are sections for 'Assignments By App' and 'Assignments By App, Record Type, and Profile', both showing 'No Assignments to display'.

6. Click on the “Activity” tab.

The screenshot shows the 'TrustRadius Account Record Page' in the Lightning App Builder. The left sidebar contains a 'Components' panel with a search bar and a list of standard components like Accordion, Action Plans List, Actions & Recommendations, Activities, Chatter, Chatter Feed, Chatter Publisher, Einstein Next Best Action, Einstein Predictions, Flow, Highlights Panel, List View, Path, Quip Associated Documents, and Quip Document. The main content area shows the 'TrustRadius Account Record Page' with a 'Details' section and an 'Activity' section. The 'Activity' section is highlighted by a red arrow. The 'Page > Tabs' section on the right shows the 'Activity' tab selected.

7. Click on “Add Tab”.

The screenshot shows the Lightning App Builder interface for the TrustRadius Account Record Page. The main content area displays the account details for Oracle Corporation, including company information, opportunities, and activities. On the right-hand pane, the 'Page > Tabs' section is visible, showing a list of tabs. The 'Add Tab' button is highlighted with a red arrow.

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

The screenshot shows the Lightning App Builder interface for the TrustRadius Account Record Page. The main content area displays the account details for Oracle Corporation. On the right-hand pane, the 'Page > Tabs' section is visible, showing a list of tabs. The 'Details' tab is selected, and the 'Chatter' component is chosen from the dropdown menu. The 'Done' button is highlighted with a red arrow.

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

The screenshot shows the Lightning App Builder interface for the 'TrustRadius Account Record Page'. On the left, the 'Components' panel lists various standard components. The 'Chatter' component is highlighted with a red arrow. On the right, the 'Chatter' tab is active, and the 'Chatter' component is being dragged onto it, also indicated by a red arrow.

Components Panel:

- Standard (29)
 - Accordion
 - Action Plans List - Financial Servi...
 - Actions & Recommendations
 - Activities
 - Chatter**
 - Chatter Feed
 - Chatter Publisher
 - Einstein Next Best Action
 - Einstein Predictions
 - Flow

TrustRadius Account Record Page:

The main content area displays the 'Oracle Corporation' record. The 'Chatter' tab is active, showing a 'Post' form and a list of activities. A red arrow points to the 'Chatter' component being added to the tab.

10. Click “Save”.

The screenshot shows the Lightning App Builder interface for the 'TrustRadius Account Record Page'. The 'Chatter' component is now visible on the 'Chatter' tab. A red arrow points to the 'Save' button in the top right corner of the interface.

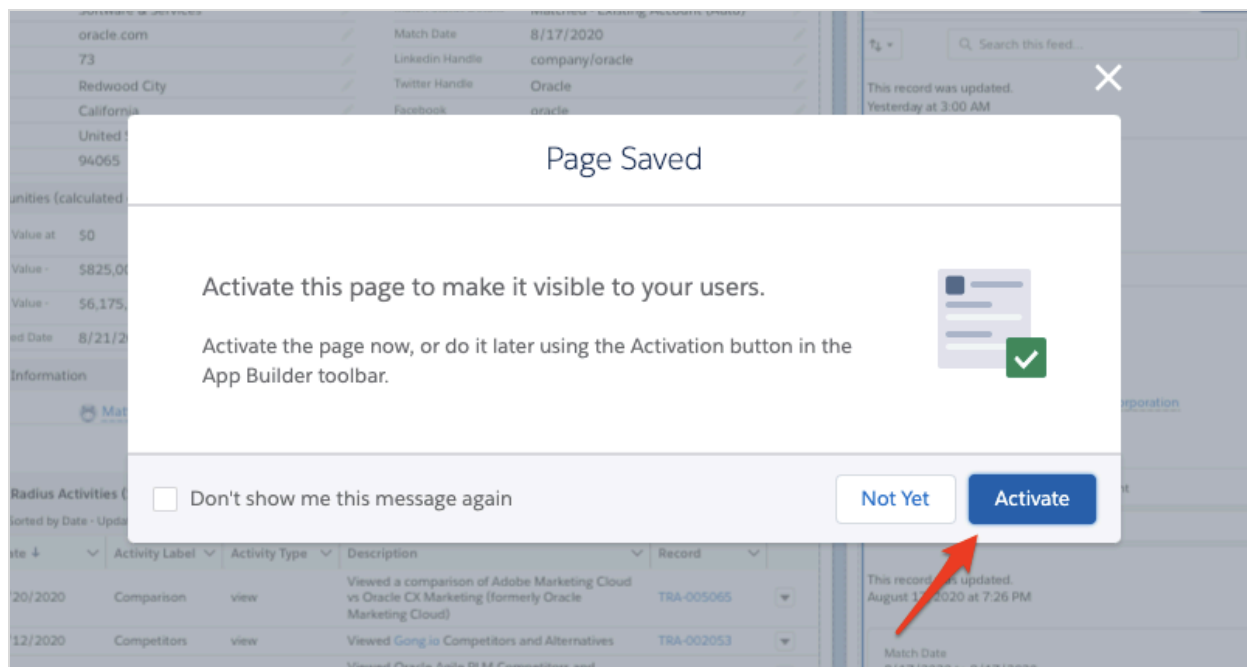
Components Panel:

- Standard (29)
 - Accordion
 - Action Plans List - Financial Servi...
 - Actions & Recommendations
 - Activities
 - Chatter
 - Chatter Feed
 - Chatter Publisher
 - Einstein Next Best Action
 - Einstein Predictions
 - Flow
 - Highlights Panel

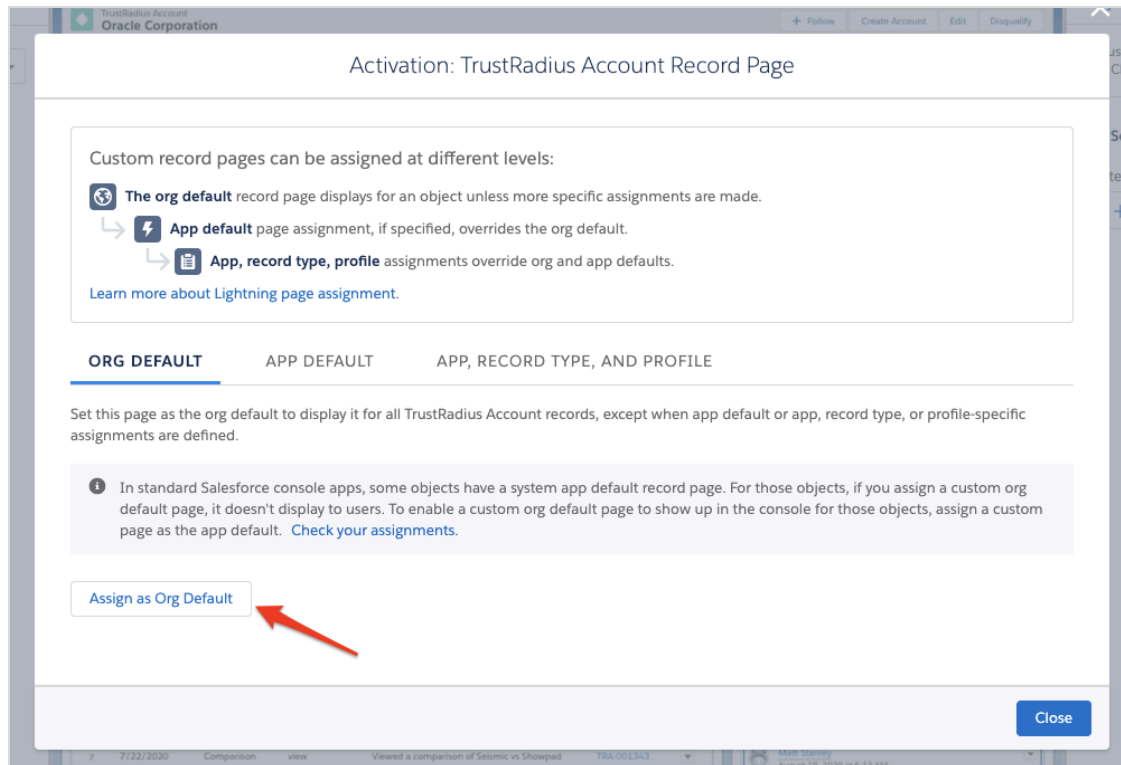
TrustRadius Account Record Page:

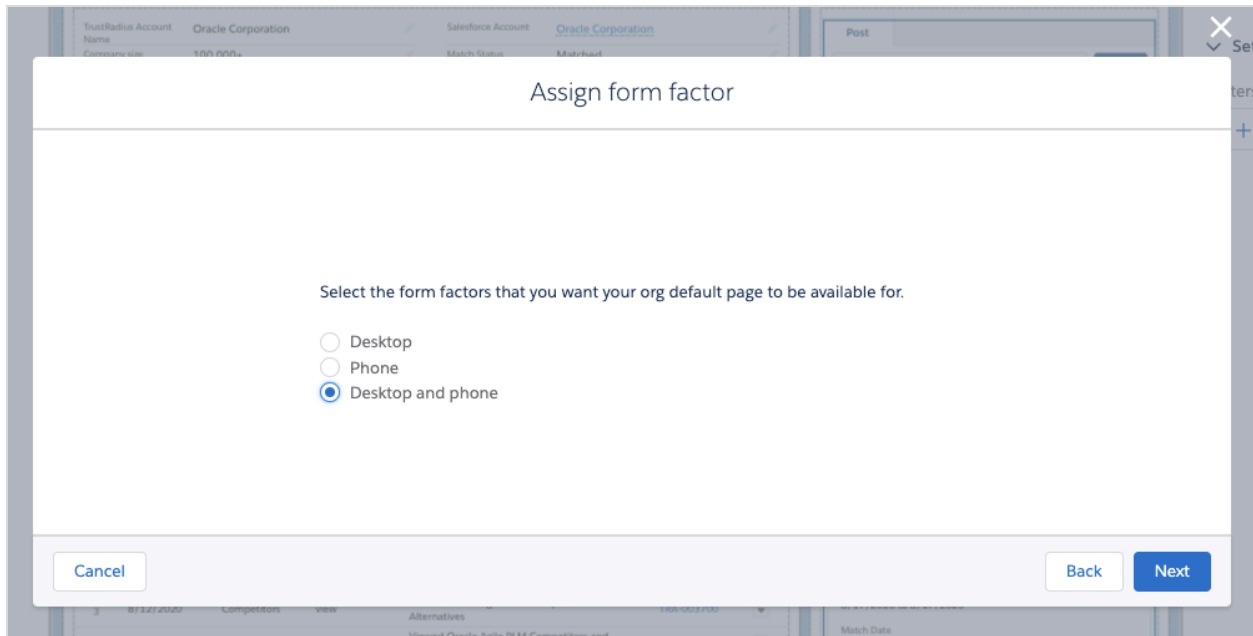
The main content area displays the 'Oracle Corporation' record. The 'Chatter' tab is active, showing a 'Post' form and a list of activities. The 'Save' button is highlighted with a red arrow.

11. Click “Activate”.



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





Assign form factor

Select the form factors that you want your org default page to be available for.

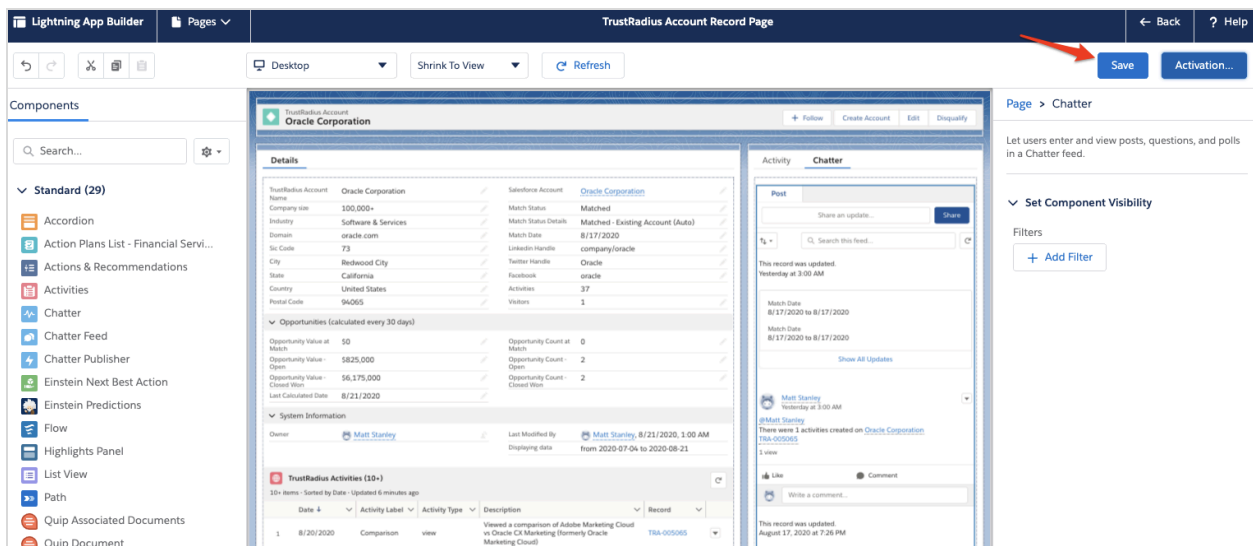
☐ Desktop

☐ Phone

☒ Desktop and phone

Cancel Back Next

13. Click “Save”



Lightning App Builder Pages TrustRadius Account Record Page Back Help

Desktop Shrink To View Refresh Save Activation...

Components

Search...

Standard (29)

- Accordion
- Action Plans List - Financial Servi...
- Actions & Recommendations
- Activities
- Chatter
- Chatter Feed
- Chatter Publisher
- Einstein Next Best Action
- Einstein Predictions
- Flow
- Highlights Panel
- List View
- Path
- Quip Associated Documents
- Quip Document

TrustRadius Account Record Page

Oracle Corporation

Details

TrustRadius Account Name	Oracle Corporation	Salesforce Account	Oracle Corporation
Company size	100,000+	Match Status	Matched
Industry	Software & Services	Match Status Details	Matched - Existing Account (Auto)
Domain	oracle.com	Match Date	8/17/2020
Sic Code	73	LinkedIn Handle	company/oracle
City	Redwood City	Twitter Handle	Oracle
State	California	Facebook	oracle
Country	United States	Activities	37
Postal Code	94065	Visitors	1

Opportunities (calculated every 30 days)

Opportunity Value at Match	\$0	Opportunity Count at Match	0
Opportunity Value - Open	\$825,000	Opportunity Count - Open	2
Opportunity Value - Closed Won	\$6,175,000	Opportunity Count - Closed Won	2
Last Calculated Date	8/21/2020		

System Information

Owner: Matt Stanley

Last Modified By: Matt Stanley, 8/21/2020, 1:00 AM

Displaying data from 2020-07-04 to 2020-08-21

TrustRadius Activities (10-)

30+ Items - Sorted by Date - Updated 6 minutes ago

Date &	Activity Label	Activity Type	Description	Record
8/20/2020	Comparison	view	Viewed a comparison of Adobe Marketing Cloud vs Oracle CX Marketing (Formerly Oracle Marketing Cloud)	TRA-005065

Page > Chatter

Let users enter and view posts, questions, and polls in a Chatter feed.

Set Component Visibility

Filters

+ Add Filter

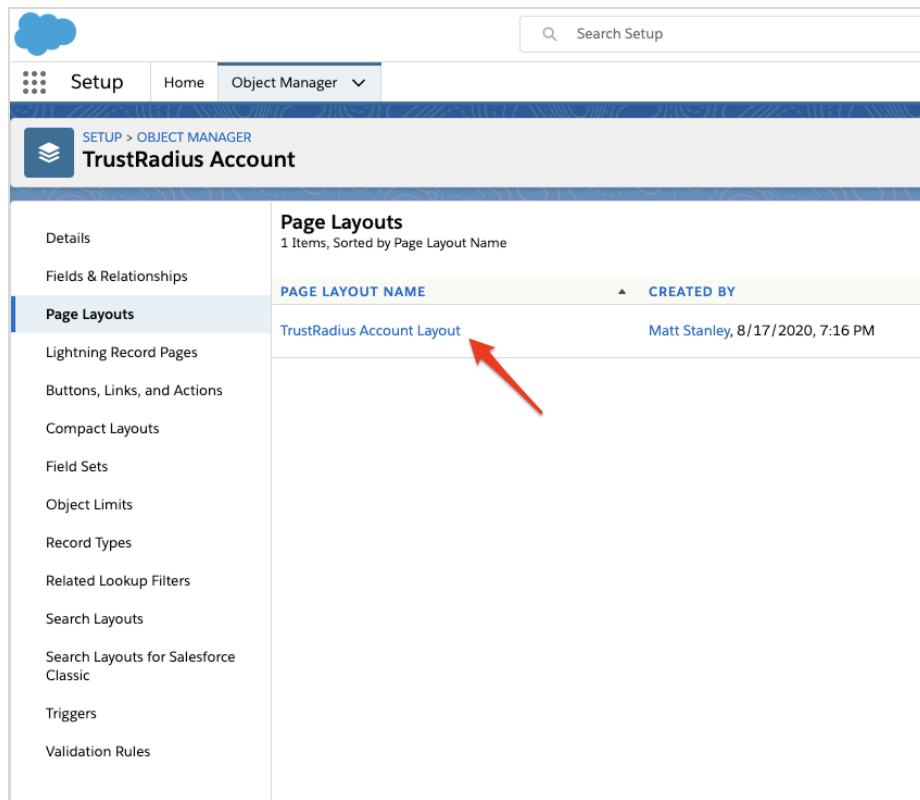
14. Click on the “Back” button in the top right.

The screenshot shows the Lightning App Builder interface for the 'TrustRadius Account Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'TrustRadius Account Record Page'. On the right side of the top bar, there are buttons for 'Back' (highlighted with a red arrow), 'Help', 'Save', and 'Activation...'. Below the top bar, the left sidebar shows a list of components under 'Standard (29)', including 'Chatter', 'Chatter Feed', 'Chatter Publisher', 'Einstein Next Best Action', 'Einstein Predictions', 'Flow', 'Highlights Panel', 'List View', 'Path', and 'Quip Associated Documents'. The main content area displays the 'TrustRadius Account Record Page' layout, which includes a 'Details' section with fields like 'Name', 'Company size', 'Industry', 'Domain', 'City', 'State', 'Country', and 'Postal Code'. It also features a 'Chatter' section with a 'Post' area and a 'Chatter Feed' showing recent updates. The right sidebar contains a 'Page > Chatter' section with a description and a 'Set Component Visibility' section with a 'Filters' button.

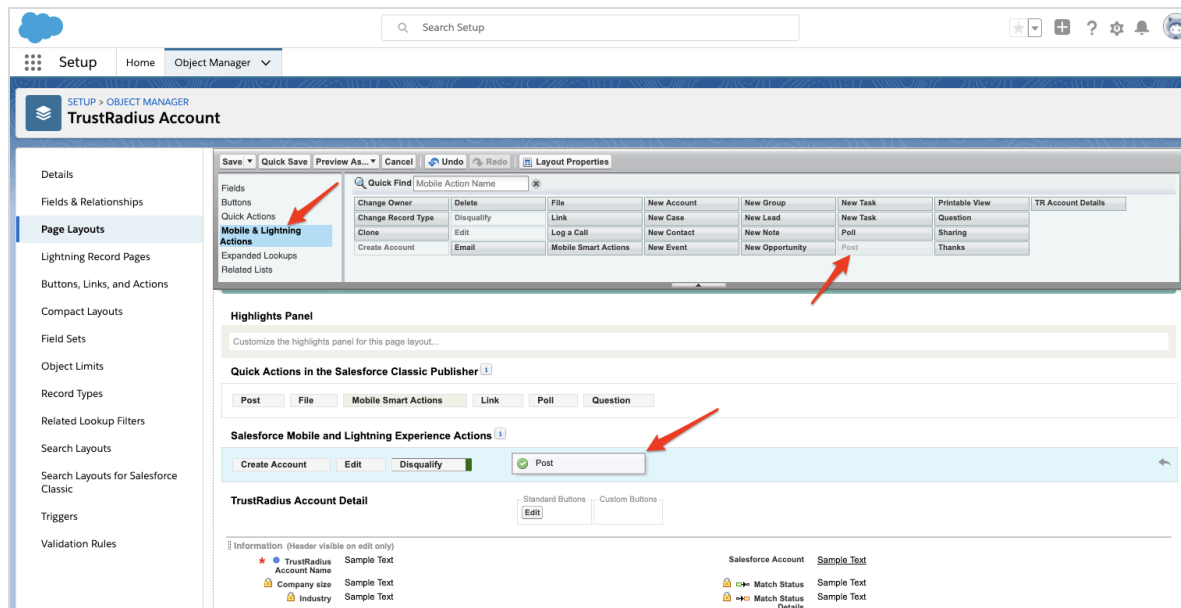
15. Click on “Page Layout” in the left panel.

The screenshot shows the 'TrustRadius Account' Object Manager page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a list of options under 'Object Manager', including 'Details', 'Fields & Relationships', 'Page Layouts' (highlighted with a red arrow), 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'Search Layouts for Salesforce Classic', 'Triggers', and 'Validation Rules'. The main content area displays the 'Lightning Page TrustRadius_Account_Record_Page (Managed)' with a 'Back to List: TrustRadius Logs' link. Below this, there is a 'Lightning Page Detail' section with 'Clone' and 'View' buttons. The 'Information' section shows the 'Name' as 'TrustRadius_Account_Record_Page' and the 'Description' as 'Viewed a comparison of Adobe Marketing Cloud vs Oracle CX Marketing (Formerly Oracle Marketing Cloud)'. There are also 'Assignments By App' and 'Assignments By App, Record Type, and Profile' sections, both showing 'No Assignments to display'. A 'Back To Top' link is at the bottom.

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”.

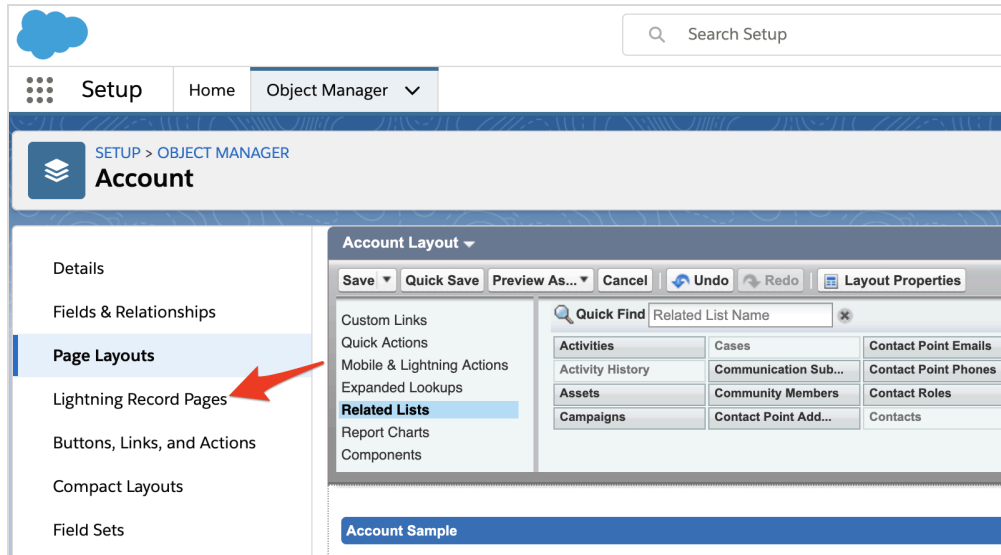
The screenshot shows the Salesforce Setup interface for the TrustRadius Account object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (highlighted), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Triggers. The main content area displays the configuration for the TrustRadius Account object. At the top, there is a toolbar with buttons: Save (highlighted with a red arrow), Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Quick Find' search bar and a table of actions. The table has columns for 'Mobile Action Name' and a list of actions. The actions are: Change Owner, Delete, File, New Account, New Group, New Task, Change Record Type, Disqualify, Link, New Case, New Lead, New Task, Clone, Edit, Log a Call, New Contact, New Note, Poll, Create Account, Email, Mobile Smart Actions, New Event, New Opportunity, and Post. Below the table is a 'Highlights Panel' section with a text input field for customizing the highlights panel. Below that is a 'Quick Actions in the Salesforce Classic Publisher' section with buttons for Post, File, Mobile Smart Actions (highlighted), Link, Poll, and Question. Below that is a 'Salesforce Mobile and Lightning Experience Actions' section with buttons for Create Account, Edit, Disqualify, and Post. At the bottom, there is a 'TrustRadius Account Detail' section with a tab for Standard Buttons and a tab for Custom Buttons, with an Edit button next to the Custom Buttons tab.

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.

The screenshot shows the Lightning App Builder interface. On the left, the 'Components' panel is open, displaying a list of components. A red arrow points to the 'Related List - Single' component. In the center, the 'TrustRadius' tab is active, showing account details for 'Goldman Sachs Group, Inc.' and a list of activities. On the right, the 'Page' configuration panel is visible, showing the 'Related List - Single' component being configured. The 'Parent Record' is set to 'TrustRadius Account', the 'Related List' is set to 'Open Activities', and the 'Related List Type' is set to 'Default'.

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

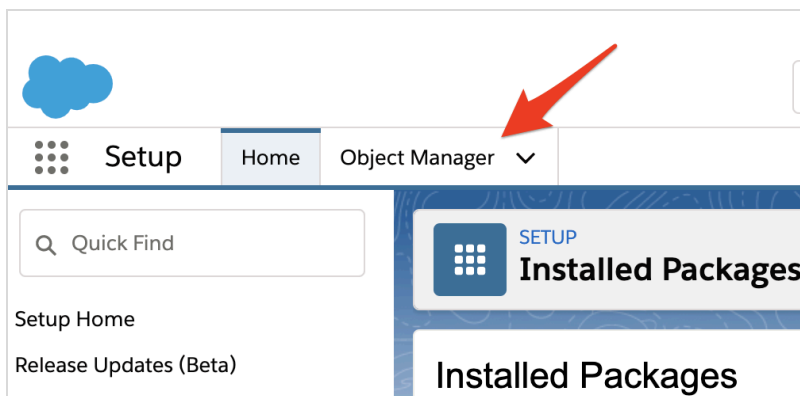
This screenshot is a continuation of the previous one, showing the configuration of the 'Related List - Single' component. Red arrows point to the configuration options in the 'Page' panel: 'Parent Record' is set to 'TrustRadius Account', 'Related List' is set to 'Open Activities', and 'Related List Type' is set to 'Default'. The 'TrustRadius' tab in the center still displays the account details and activities for 'Goldman Sachs Group, Inc.'.

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

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

The screenshot shows the TrustRadius Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup categories, with 'User Profile Page Layouts' highlighted. The main content area displays 'User Profile Page Layouts' with a table containing one item, 'User Profile Layout'. A red arrow points to the 'User Profile Layout' entry in the table.

PAGE LAYOUT NAME	CREATED BY
User Profile Layout	

- Drag and drop the fields “Disable TrustRadius Chatter” and “Disable TrustRadius Tasks” onto the Page Layout.

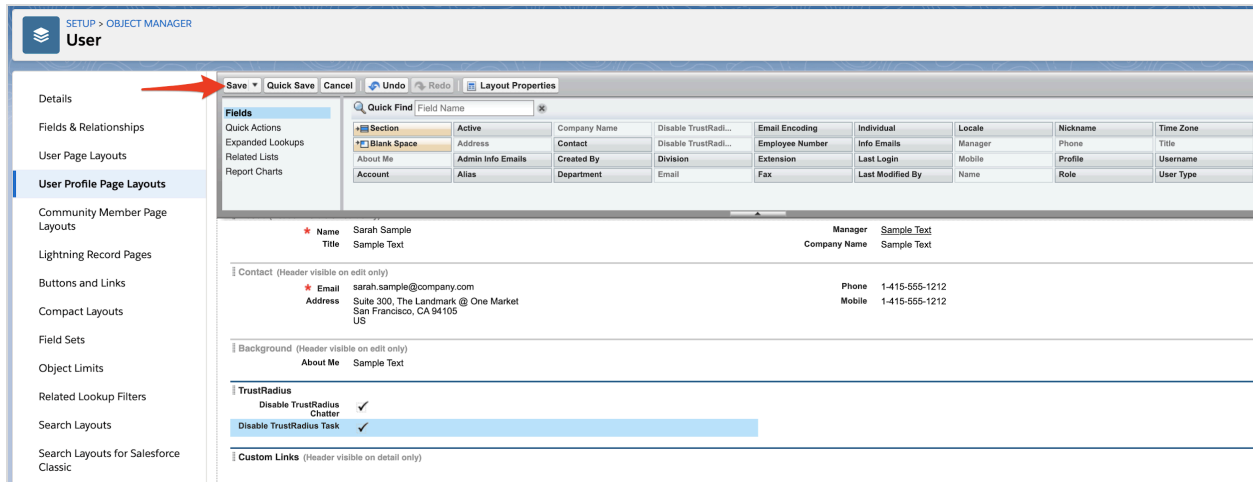
The screenshot shows the TrustRadius Setup interface, specifically the 'User Profile Page Layout' editor. The left sidebar lists various setup categories, with 'User Profile Page Layouts' highlighted. The main content area displays a list of fields, including 'Disable TrustRadius Chatter' and 'Disable TrustRadius Tasks', which are highlighted with red boxes. Below the fields list, there is a section for 'Custom Links'.

Fields	Quick Find	Field Name
Section	Active	Company Name
Blank Space	Address	Contact
About Me	Admin Info Emails	Created By
Account	Alias	Department
		Email
		Extension
		Fax
		Last Modified By
		Name
		Role
		User Type

Custom Links (Header visible on edit only)

Field Name	Field Type
Disable TrustRadius Chatter	✓
Disable TrustRadius Task	✓

5. Click “Save” on the Page Layout.



SETUP > OBJECT MANAGER

User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Community Member Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Field Name

Section Active Company Name Disable TrustRadi... Email Encoding Individual Locale Nickname Time Zone

Blank Space Address Contact Disable TrustRadi... Employee Number Info Emails Manager Phone Title

About Me Admin Info Emails Created By Division Extension Last Login Mobile Profile Username

Account Alias Department Email Fax Last Modified By Name Role User Type

Name Sarah Sample Manager Sample Text

Title Sample Text Company Name Sample Text

Contact (Header visible on edit only)

Email sarah.sample@company.com Phone 1-415-555-1212

Address Suite 300, The Landmark @ One Market Mobile 1-415-555-1212

San Francisco, CA 94105 US

Background (Header visible on edit only)

About Me Sample Text

TrustRadius

Disable TrustRadius Chatter ✓

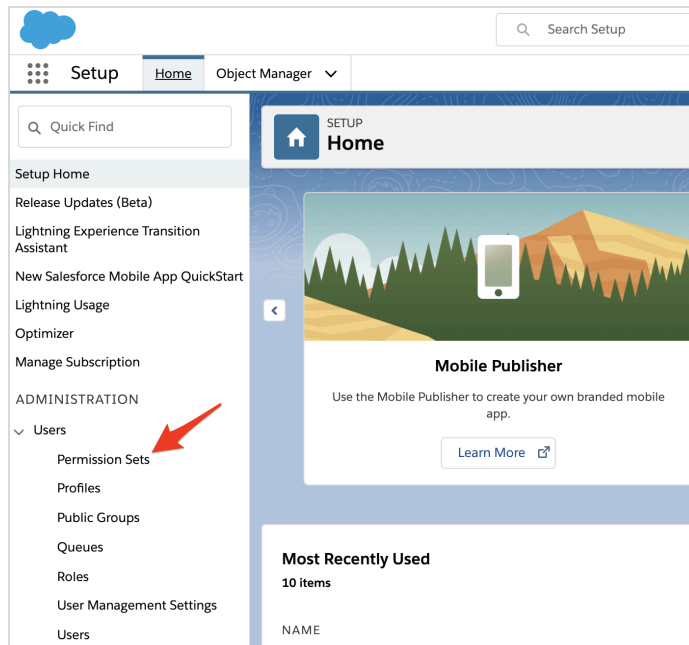
Disable TrustRadius Task ✓

Custom Links (Header visible on detail only)

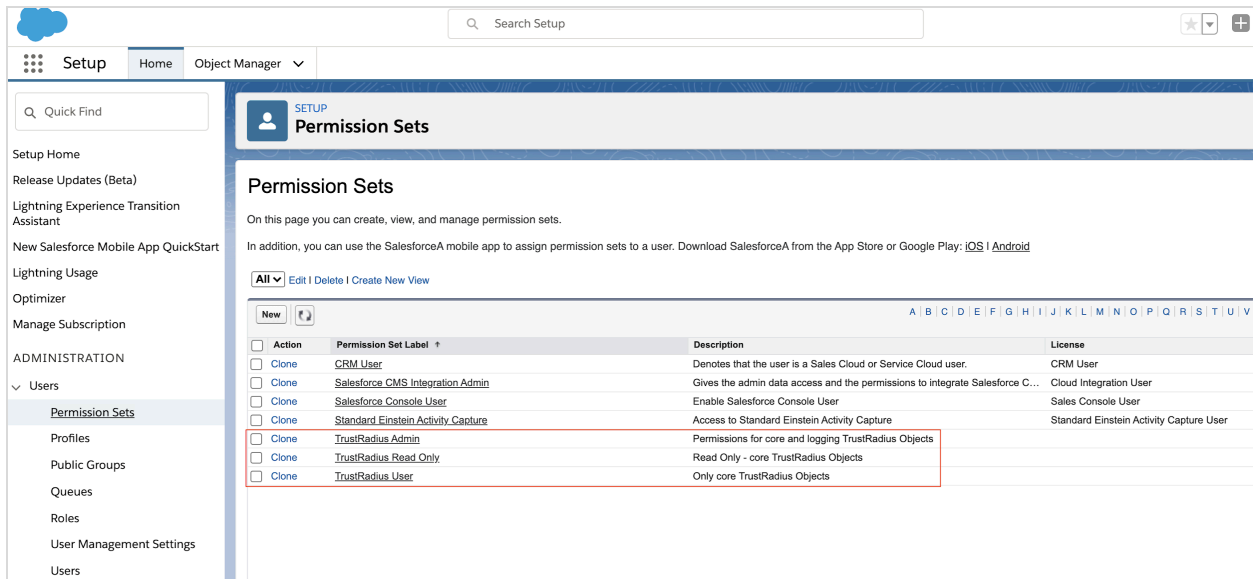
Uninstalling the TrustRadius Connector

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.



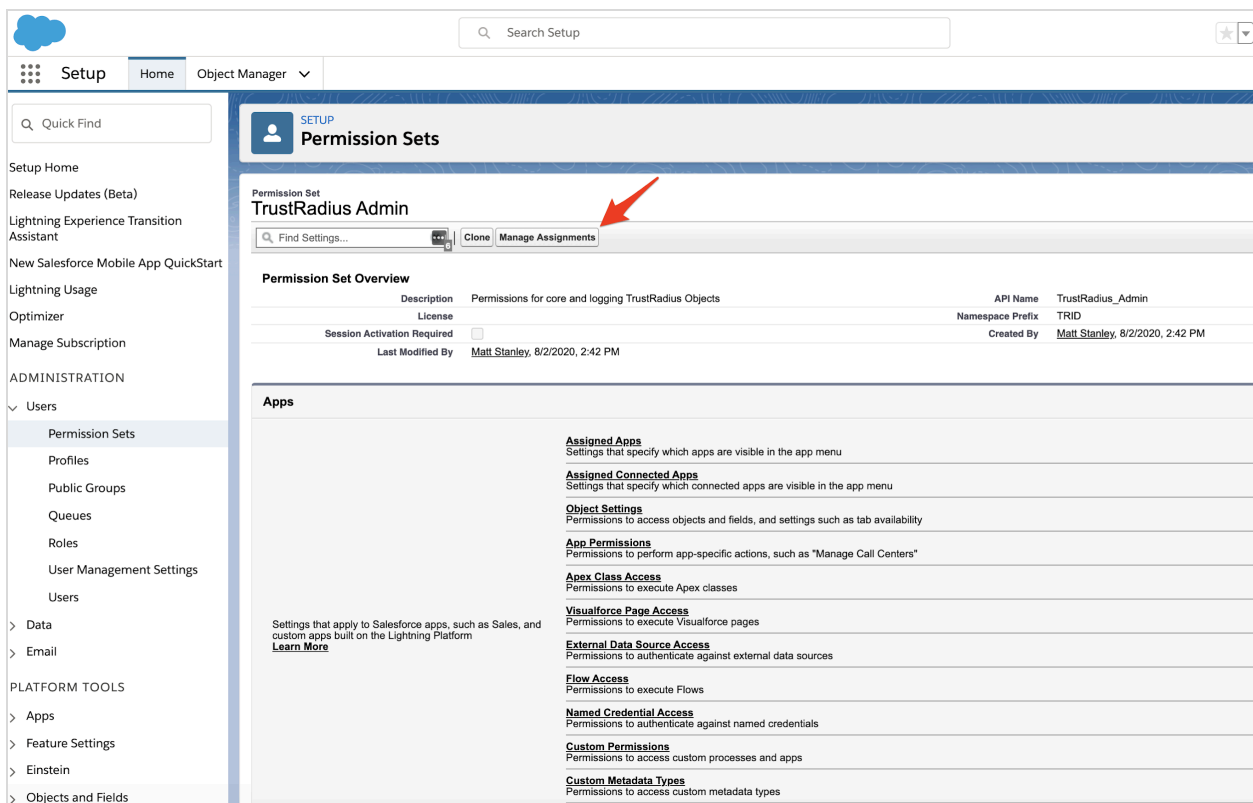
2. Select a TrustRadius permission set.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Permission Sets' is selected under the 'Users' section. The main content area displays the 'Permission Sets' list. A table lists various permission sets, with 'TrustRadius Admin' highlighted by a red box. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce C...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Clone	TrustRadius Admin	Permissions for core and logging TrustRadius Objects	
<input type="checkbox"/> Clone	TrustRadius Read Only	Read Only - core TrustRadius Objects	
<input type="checkbox"/> Clone	TrustRadius User	Only core TrustRadius Objects	

3. Click “Manage Assignments”.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Permission Sets' is selected under the 'Users' section. The main content area displays the 'TrustRadius Admin' permission set details. A red arrow points to the 'Manage Assignments' button. The page shows the 'Permission Set Overview' and a list of 'Apps' with their respective permissions.

Permission Set Overview

Description	License	API Name	TrustRadius Admin
Permissions for core and logging TrustRadius Objects		Namespace Prefix	TRID
Session Activation Required	<input type="checkbox"/>	Created By	Matt Stanley, 8/2/2020, 2:42 PM
Last Modified By	Matt Stanley, 8/2/2020, 2:42 PM		

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Flow Access**
Permissions to execute Flows
- Named Credential Access**
Permissions to authenticate against named credentials
- Custom Permissions**
Permissions to access custom processes and apps
- Custom Metadata Types**
Permissions to access custom metadata types

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

The screenshot shows the 'Permission Sets' page in the TrustRadius Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Permission Sets' and shows a table of assigned users for the 'TrustRadius Admin' permission set. A red arrow points to the 'Remove Assignments' button in the top right corner of the table.

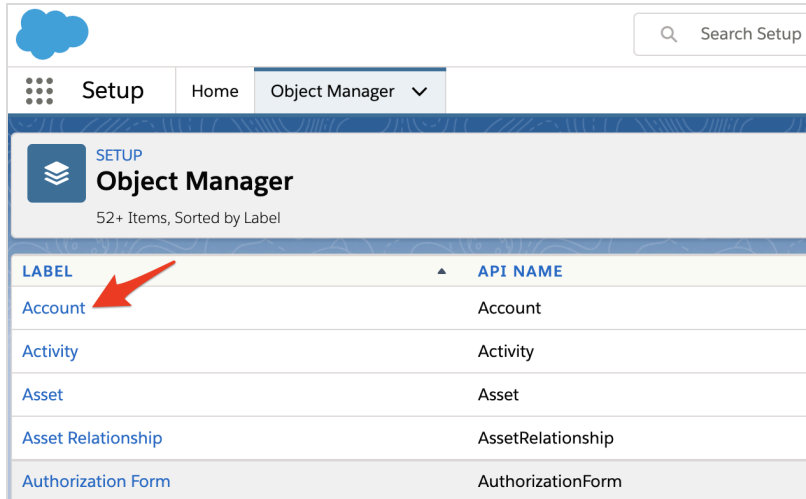
Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
<input checked="" type="checkbox"/> Edit	Srinivasan, Sandhya	ssrin	sandhya.srinivasan@trustradius.com.trusttestpe			<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/> Edit	Stanley, Matt	mstan	matt.stanley@trustradius.com.trusttestpe	8/2/2020, 2:16 PM		<input checked="" type="checkbox"/>	System Administrator

5. Repeat steps above for each TrustRadius permission set (TrustRadius Admin, TrustRadius User, TrustRadius Read-Only).

6. Select “Object Manager”.

The screenshot shows the 'Object Manager' dropdown menu in the TrustRadius Setup interface. A red arrow points to the 'Object Manager' dropdown menu. The main content area is titled 'Installed Packages'.

7. Select "Account".

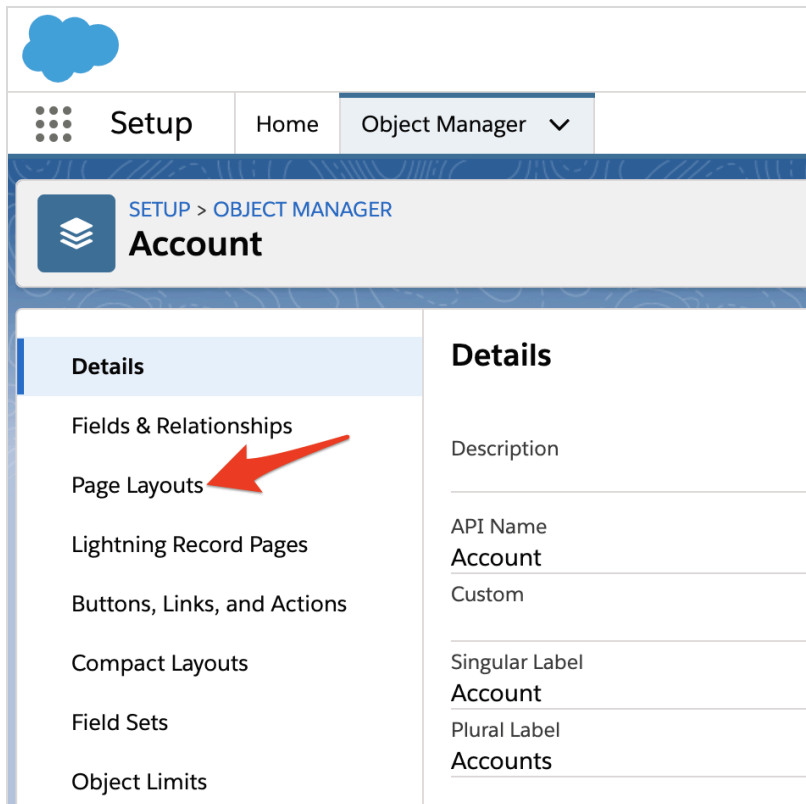


Setup Home Object Manager ▾

SETUP
Object Manager
52+ Items, Sorted by Label

LABEL	API NAME
Account	Account
Activity	Activity
Asset	Asset
Asset Relationship	AssetRelationship
Authorization Form	AuthorizationForm

8. Select "Page Layouts".



Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
Account

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits

Details

Description

API Name
Account

Custom

Singular Label
Account

Plural Label
Accounts

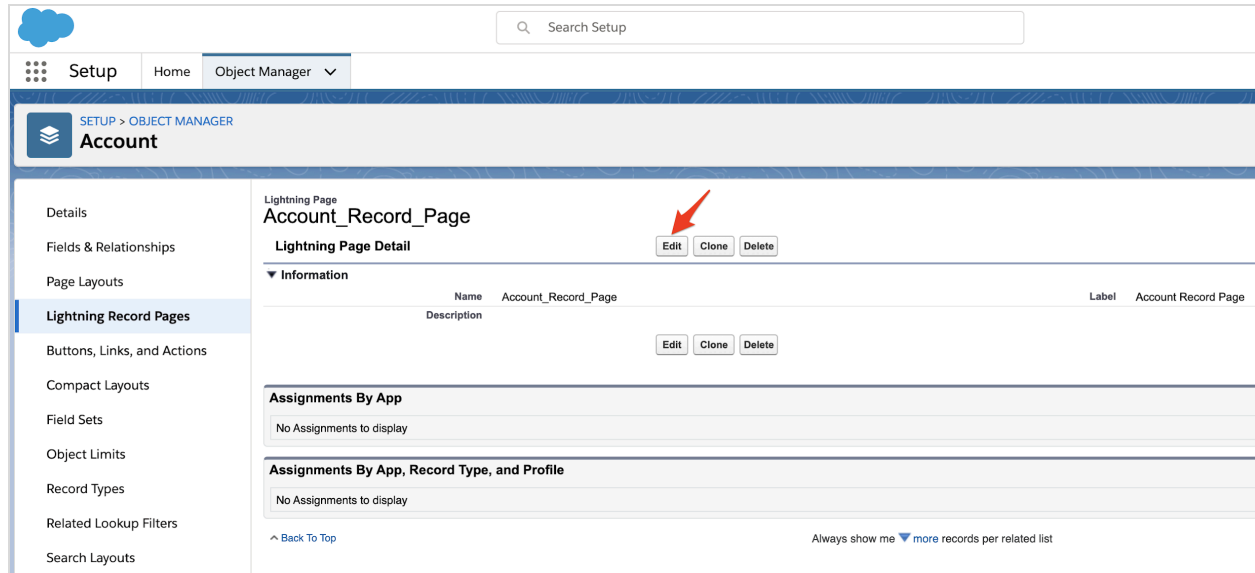
9. Select the Page Layouts which include TrustRadius objects and fields.
10. Remove the “TrustRadius” Section and “TrustRadius Activities” Related List from the Page Layout. Click “Save”.

The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays the 'Account' page layout. A red box highlights the 'TrustRadius' section, which includes a 'TrustRadius Account' field. Another red box highlights the 'TrustRadius Activities' related list. A red arrow points to the 'Remove Section' button located at the bottom right of the 'TrustRadius' section.

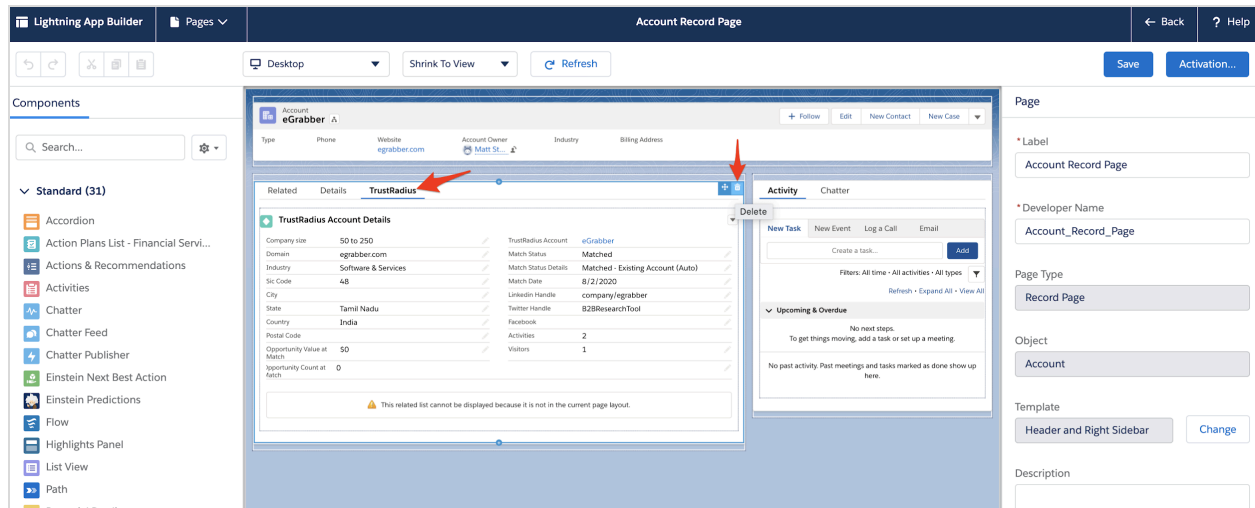
7. Select “Lightning Record Pages”.

The screenshot shows the Salesforce Setup interface for the 'Account' object. The left sidebar lists various setup options, with 'Page Layouts' selected. A red arrow points to the 'Lightning Record Pages' option in the sidebar. The main content area displays the 'Account' page layout, which includes sections for 'Custom Links', 'Quick Actions', 'Mobile & Lightning Actions', 'Expanded Lookups', 'Related Lists', 'Report Charts', and 'Components'. The 'Account Sample' section is also visible at the bottom.

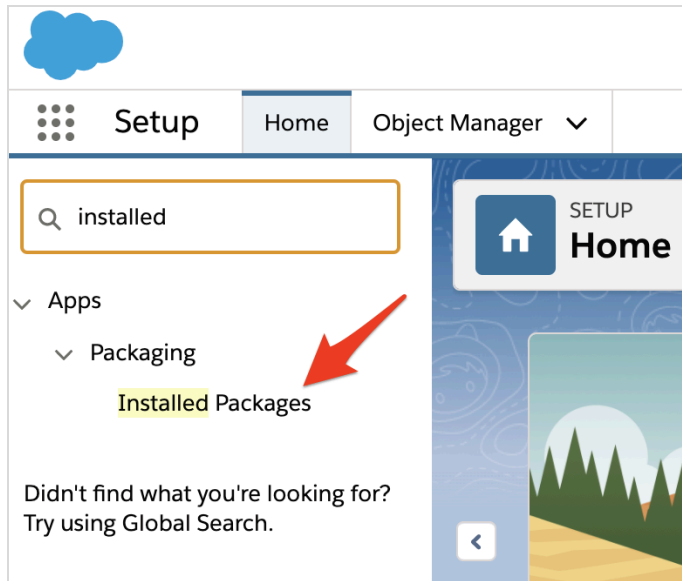
8. Select the Lightning Record Page(s) which include TrustRadius objects and fields.
9. Click “Edit”.



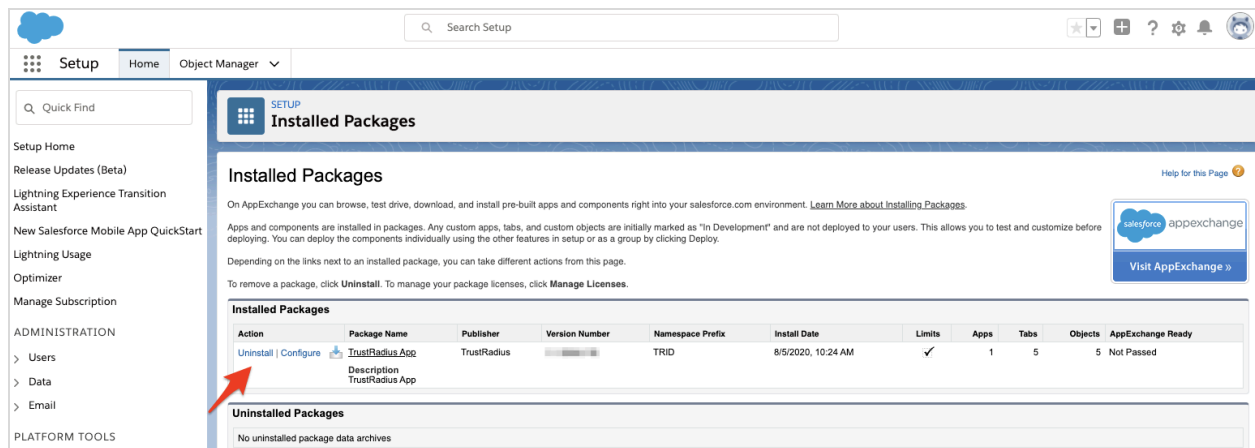
10. Select the “TrustRadius” tab and click the trash icon in the upper right hand corner.
11. Click “Save”.



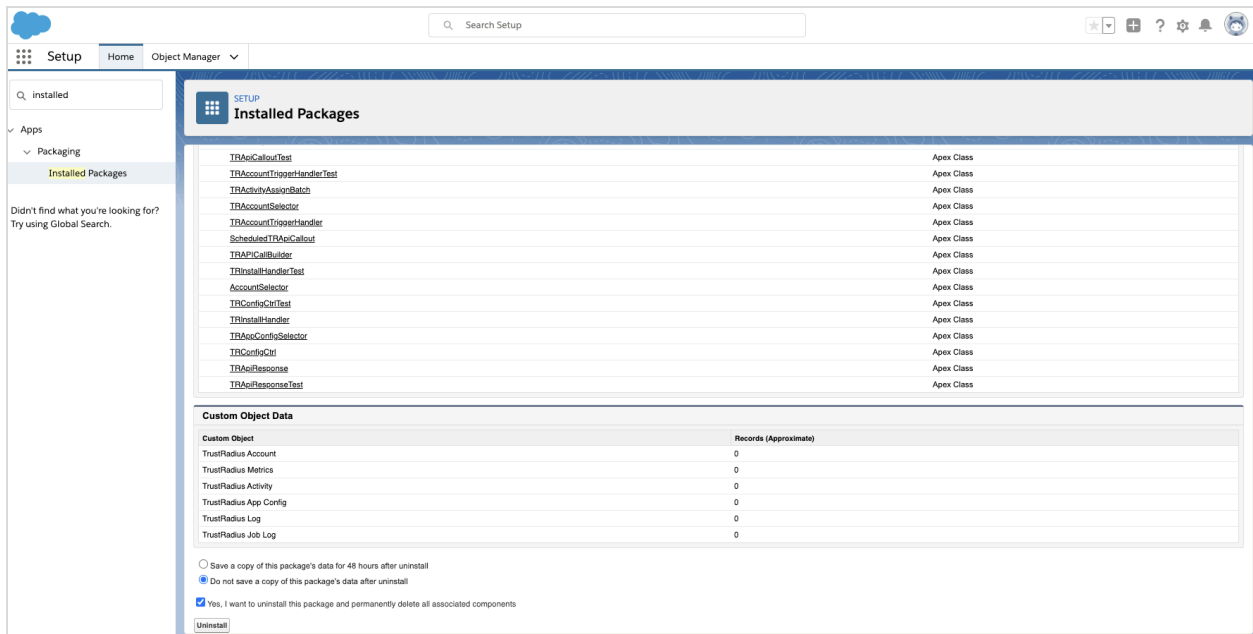
12. Navigate to your organization's Installed Packages.



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.

