This document outlines important information for installation process for "Intelligent Third-Party Paper Extraction for Conga Contracts"

Brightleaf TPP Package for Salesforce - Installation Guide

Brightleaf Solutions, Inc.
Version 1.0 – 10/13/2021

Brightleaf TPP Package Installations

For Conga/SF (CFS/C1)

Version 1.0

Last updated October 2021

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GETTING STARTED

This guide is designed to make the installation process as easy and efficient as possible.

REQUIREMENTS

● You must be a Salesforce System Administrator to install Brightleaf TPP package for Salesforce

● Below mentioned pre-requisite installed packages must be enabled for your org

1.   Pre-requisite Installed Packages

Below is the list of packages which must be installed for the Brightleaf TPP package to work.
- Conga contract life cycle Management: 12.630
- Conga Base Library: 2.203

Login to your Org and check above packages are installed or not. To check this, follow the steps given below:

Steps:

Check the above-mentioned packages are available in the Org or not.
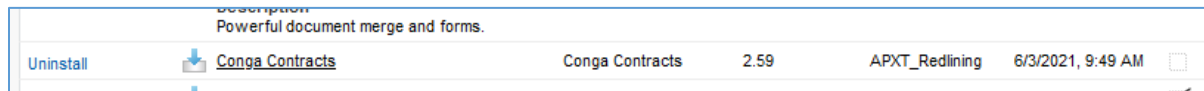
1.1   Click on the Gear icon on the top right side, go to Set up
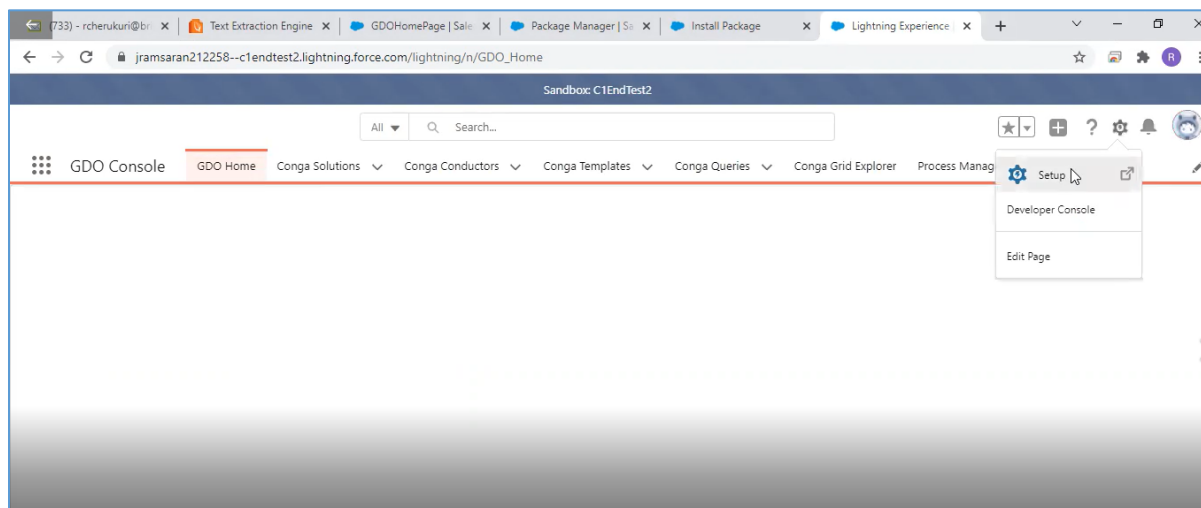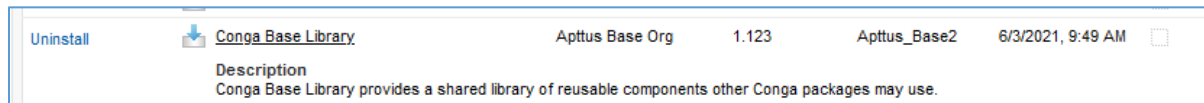

1.2   In Quick Find box, type "Installed Packages". Click on "Installed Packages" from the below list. The list of installed packages will appear in the right pane.
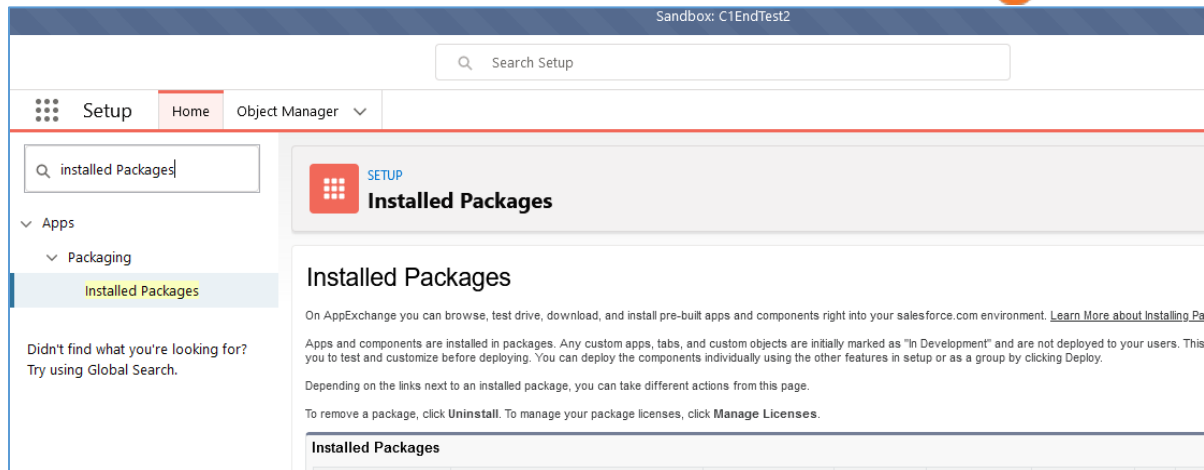
1.3   In the list, look for "Conga Contracts", this package should be available in the installed packages.

1.4   Similarly, in the list look for "". This package should be available in the installed packages.

Note: For the documentation purpose, screenshots provided in this document throughout are shown for the Sandbox Org. This will vary for the Production Org.

2.   Setup/Install Brightleaf TPP Package

The Brightleaf TPP package can be installed either in any Production or Sandbox Org.

Use the below URL for the Brightleaf Package installation for <u>Conga/SF (CFS/C1) Managed Package in the Production</u>

<u>Org</u>.

- https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5g000000y2C4

Use the below URL for the Brightleaf Package installation for <u>Conga/SF (CFS/C1) Managed Package in the Sandbox</u>

<u>Org</u>.

- https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5g000000y2C4

Note: The installation process will be performed using the main user credentials having the System Administrator profile and not of the Integration User.

Steps:

2.1 Copy/paste the Conga/SF (CFS/C1) Managed Package link in browser. Hit enter.

2.2 It will ask for the login credentials

2.3 Enter the login credentials and user will be logged in and redirected to the installation page. The user will be one of the main user with System Administrator role

2.4 Select "Install for Admin only" option on installation page

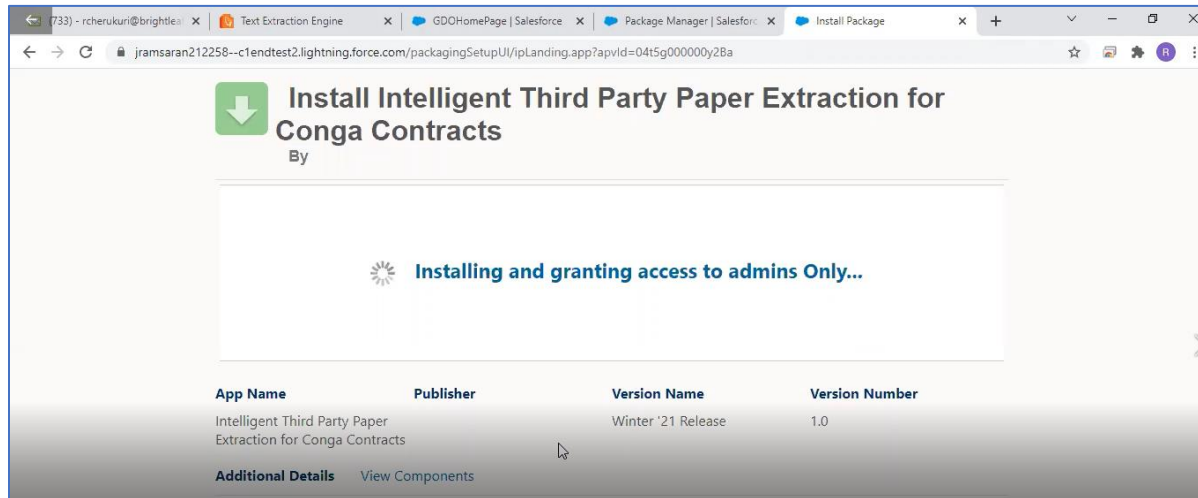2.5 Click the checkbox of Acknowledgement

2.6 Click on Install button
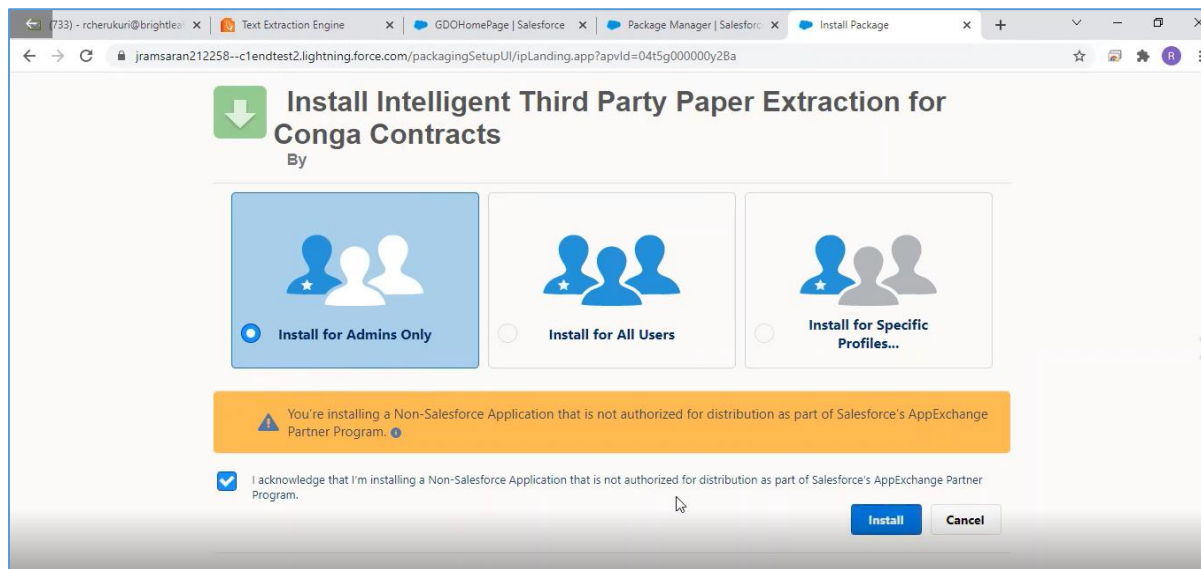
2.7 A popup will appear for the approval of Third Party Access
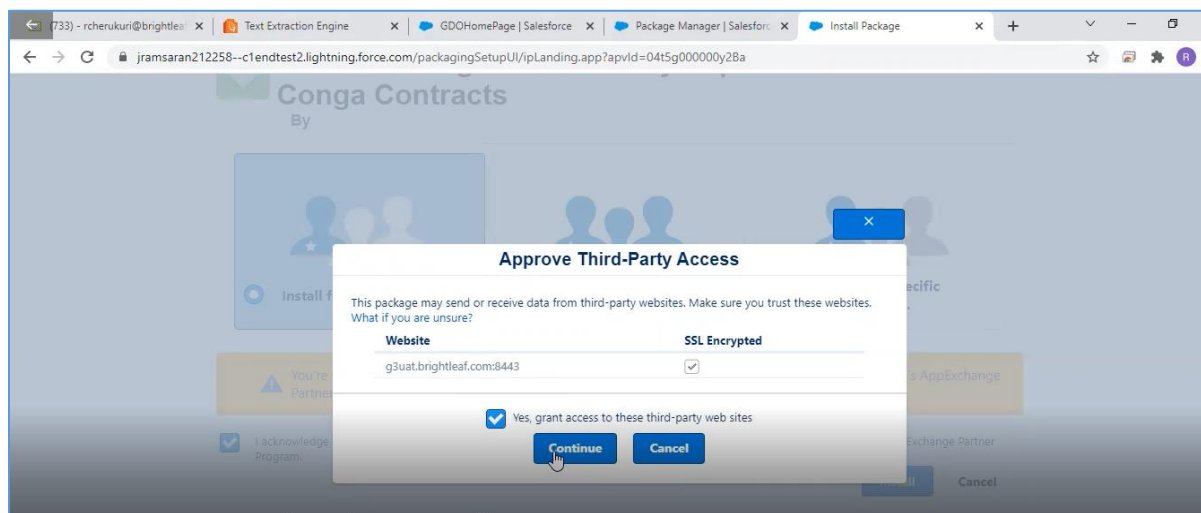
2.8 Click the checkbox "Yes, grant access to these third-party web sites

2.9   Click on Continue button

2.10   Package Installing process will start

2.11   Once the package is installed, the installation confirmation appears.
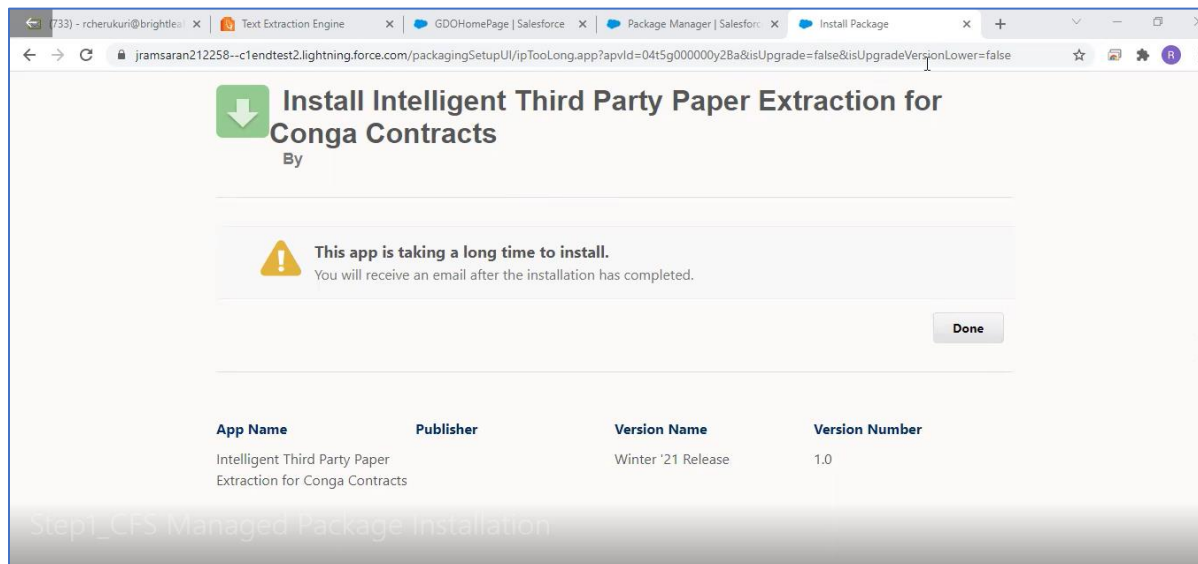
2.12   Click on Done.

2.13   Post Installation, go to installed packages and check "Intelligent Third Party Paper Extraction for Conga
Contracts" appear in the list.

2.14   For this, Click on Gear icon on the top right side. Go to Setup.
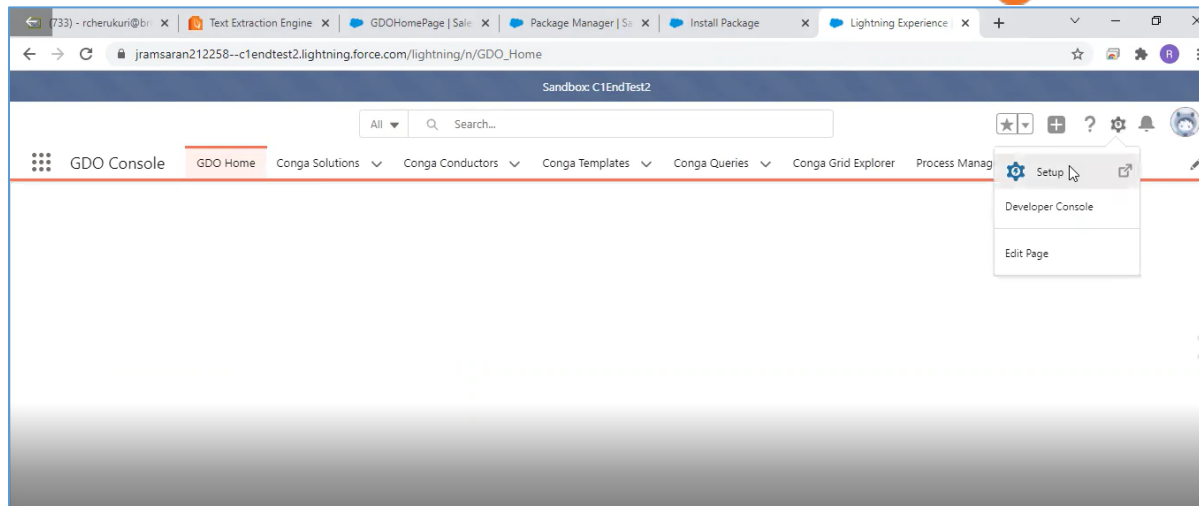
2.15   In "Quick Find" box, type "Installed Packages"
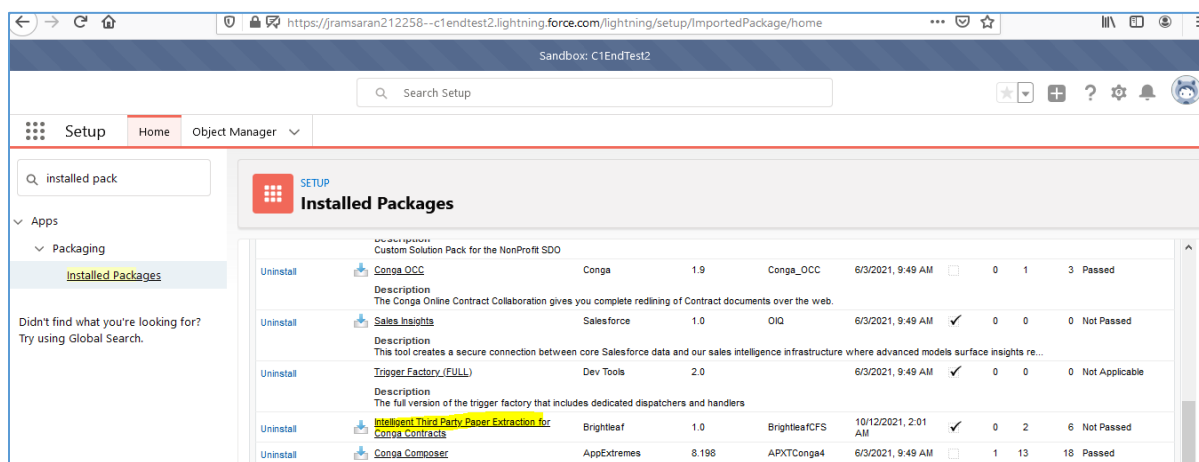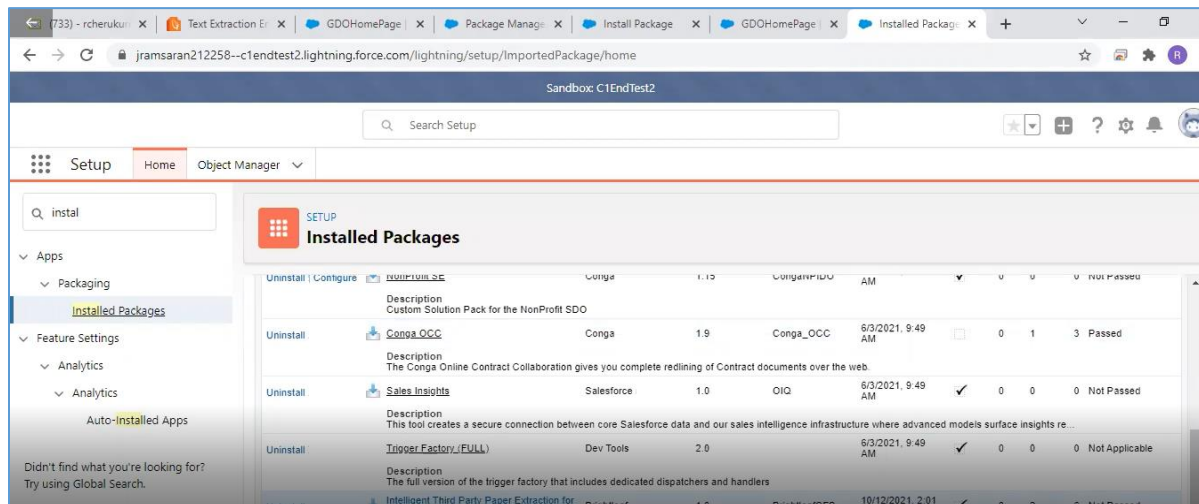
3.   Profile & Integration User Creation

Create an Integration user and share the credentials to Brightleaf team.

Steps:

To create an Integration User, first need to create an Integration Profile and assign the created Integration Profile to the User

3.1   Click on Gear icon. Go to Set up

3.2   In the Quick Find, type "Profiles"

3.3   From the list below, click on Profiles in the left pane

3.4   Click on 'New Profile' button on the right pane
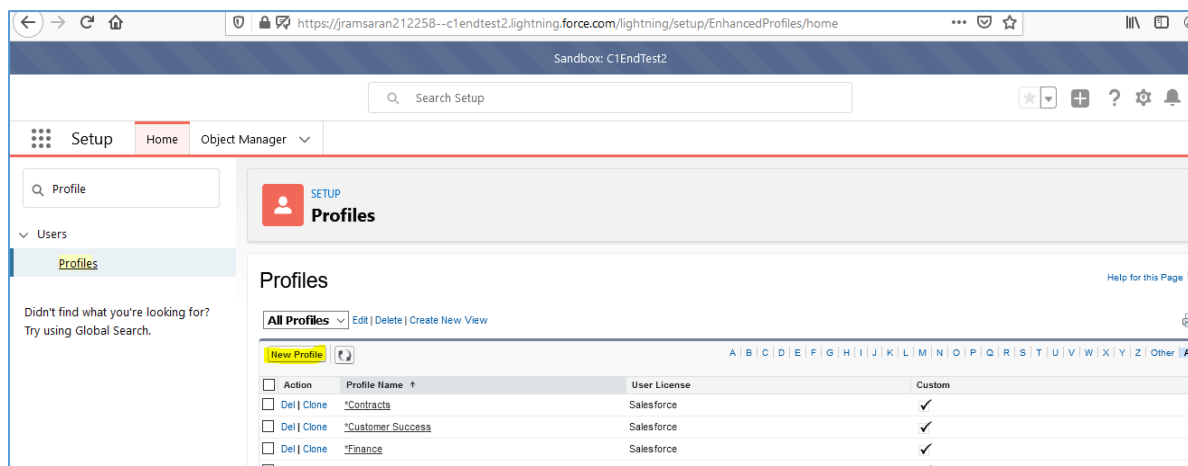
3.5   Select "System Administrator" for Existing Profile and give profile name as "IntegrationProfile"
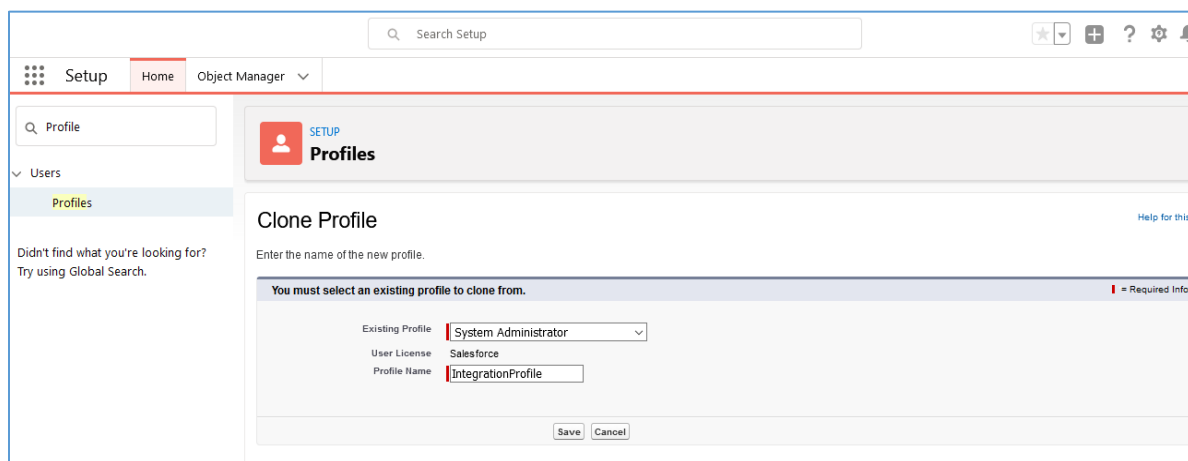
3.6   Click on Save

3.7   The created profile will be shown in the list
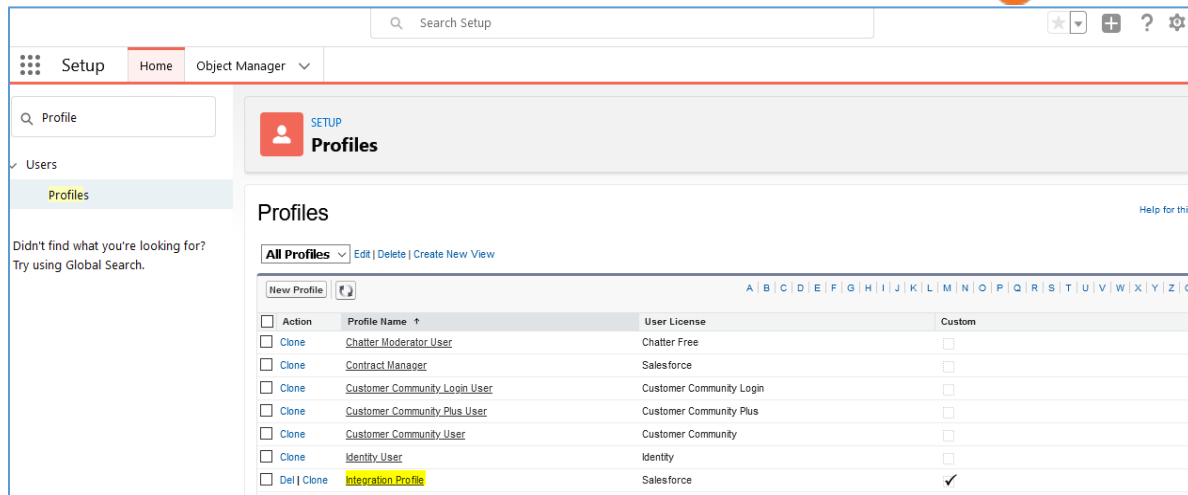
3.8   Create a User and assign the created 'Integration Profile" to it

3.8.1   Click on Gear icon. Go to Set up

3.8.2   In the Quick Find, type "Users"

3.8.3   From the list below, click on Users in the left pane
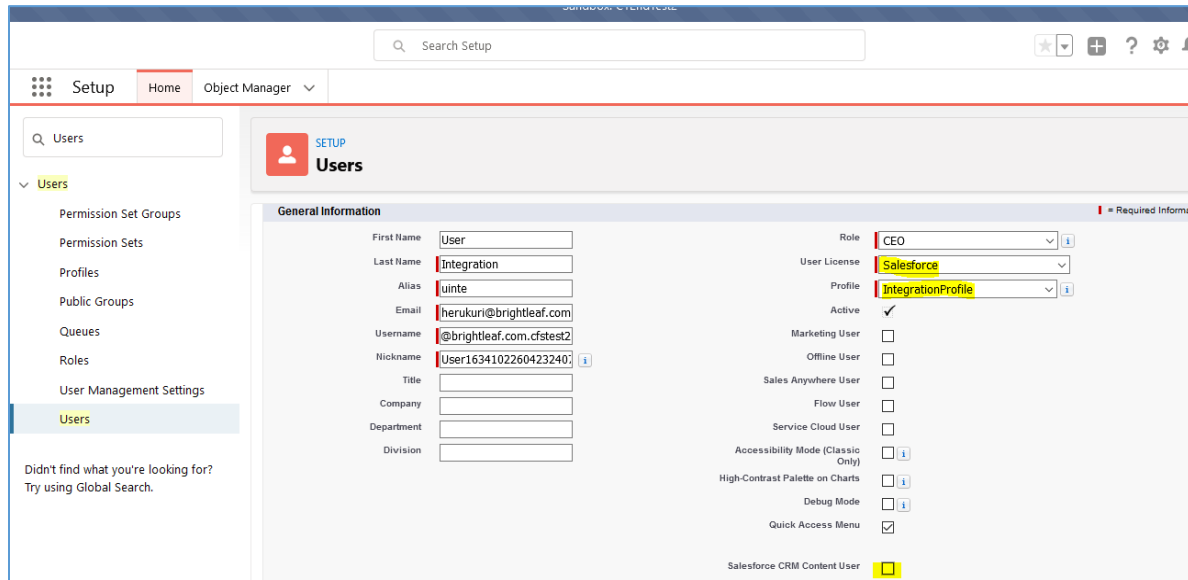
3.8.4   Click on 'New User' button on the right pane
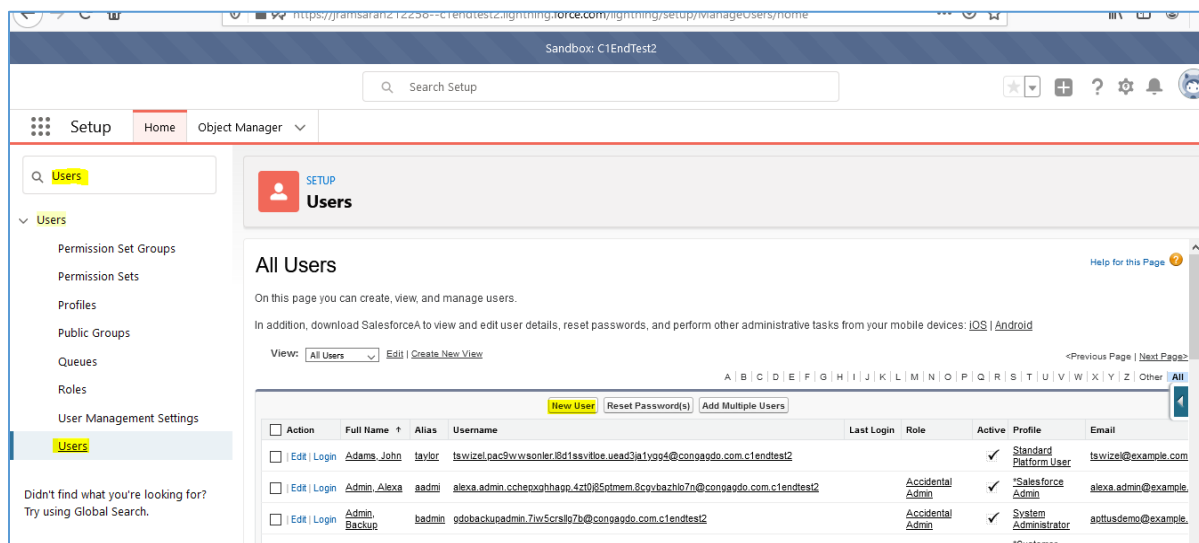
3.8.5   A form will appear and fill the following details as an example:

- First Name: User

- Last Name: Integration

- Email: rcherukuri@brightleaf.com [change to your email address]

- Username: rcherukuri@brightleaf.com.cfstest2 [change as per your req.]

- Role: CEO [change as per your req.]

- User License: Salesforce

- Profile: IntegrationProfile

- Salesforce CRM Content User: uncheck the checkbox

3.8.6   Click on Save

3.8.7   The Integration User will be shown in the list of Users

4.   Assign Permission to users
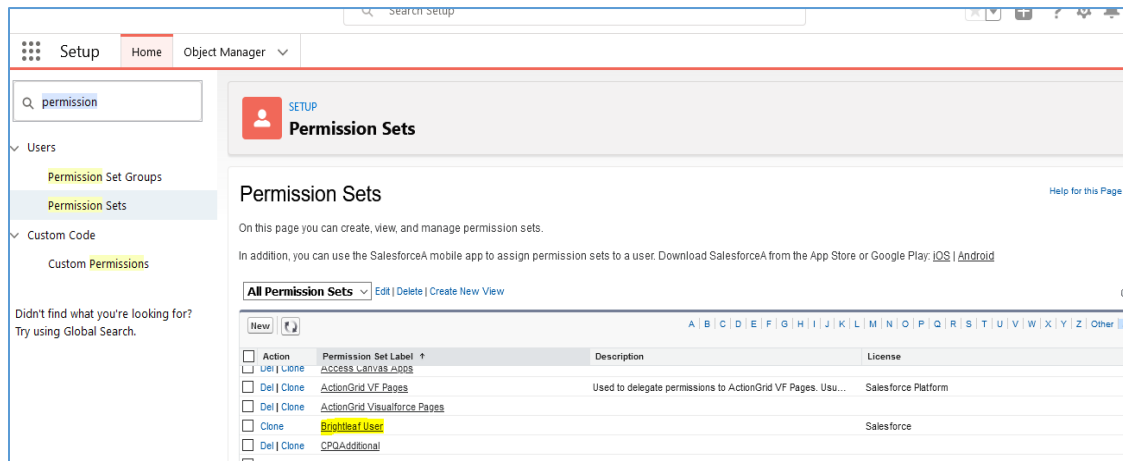
4.1 Assign 'Brightleaf User' permission set

Assign 'Brightleaf User' permission set to the main user (with which user logged in having System Administrator role) and the Integration User

Steps:
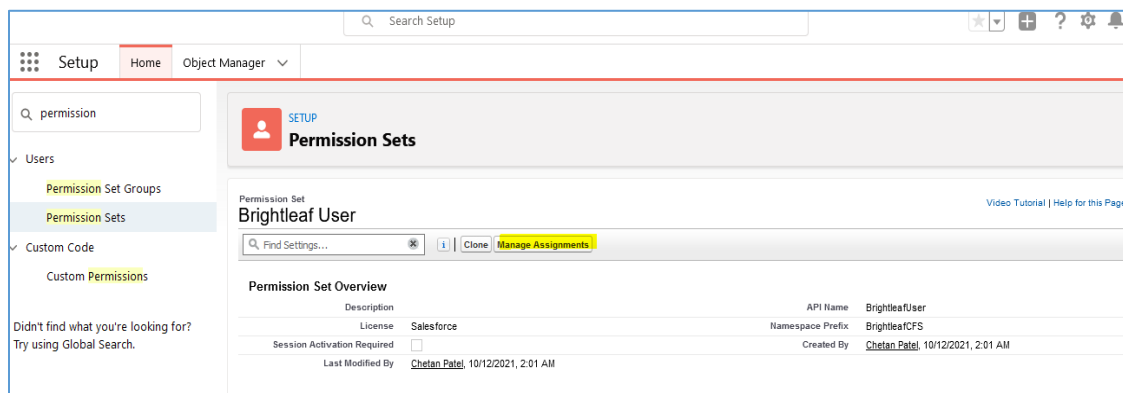
4.1.1   Click on the Gear icon, go to Set up

4.1.2   In Quick Find box, type "permission". From the list below, click on "Permission Sets". The list of permissions will be shown in right pane
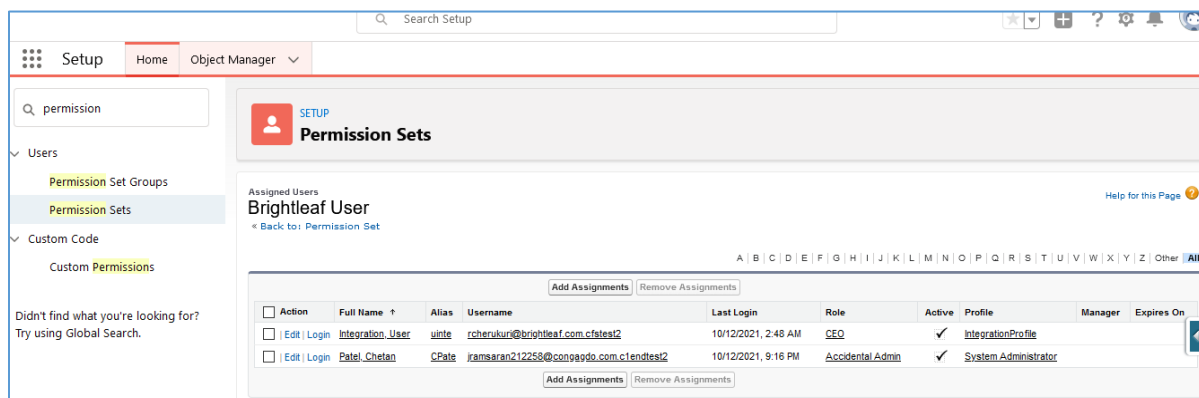
4.1.3   Click on "Brightleaf User" permission

4.1.4   Click on "Manage Assignments" button

4.1.5   Select the Main User (user having System Administrator profile) and Integration User

4.1.6   Click on 'Add Assignment' button

4.1.7   Click on Done

The above steps will set 'Brightleaf User' to the main user having system administrator profile and the Integration User.

4.2 Assign 'IP range'

Usually every Org (either the Production or the Sandbox Org) will have its own IP range of addresses depending on the Client Org configuration. If none of the IP ranges are available in the Org, then follow below steps to add the IP ranges to the Integration User Profile.

Steps:

4.2.1 Click on the Gear icon on the top right side. Go to Set up

4.2.2 In Quick Find text field, type "Users". From the list, look for "Users"
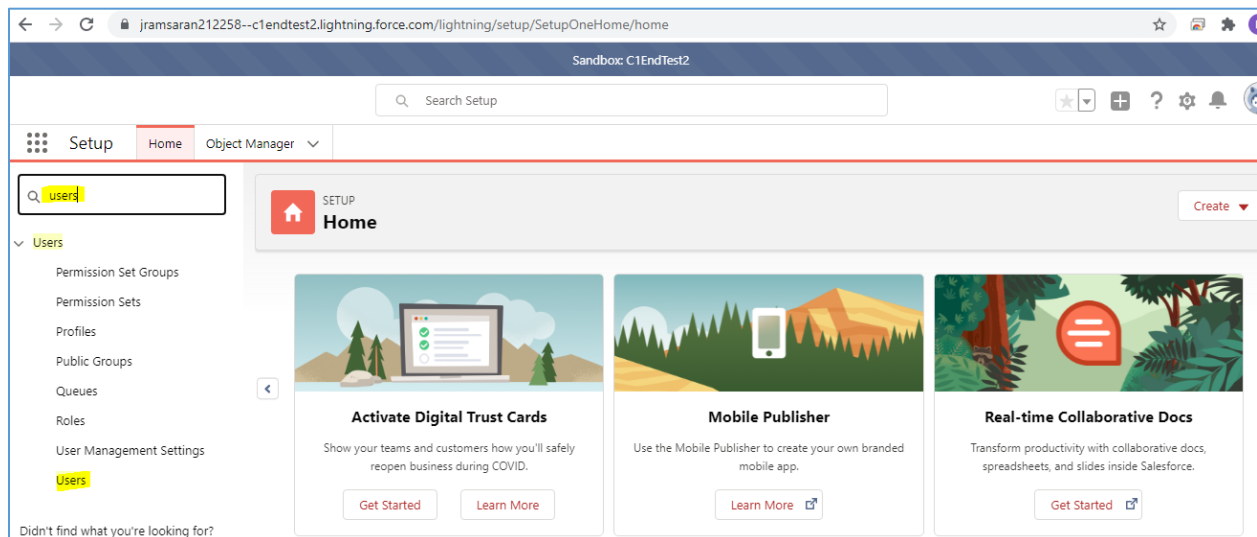
4.2.3 Click on "Users"

4.2.4 From the list of Users, click on the User created with Integration Profile

4.2.5 Click on the User Name

4.2.6 Go to Profile section of that particular user. Click on Profile Name

4.2.7 Navigate down and look for 'Login IP Ranges' under System. Click on the it

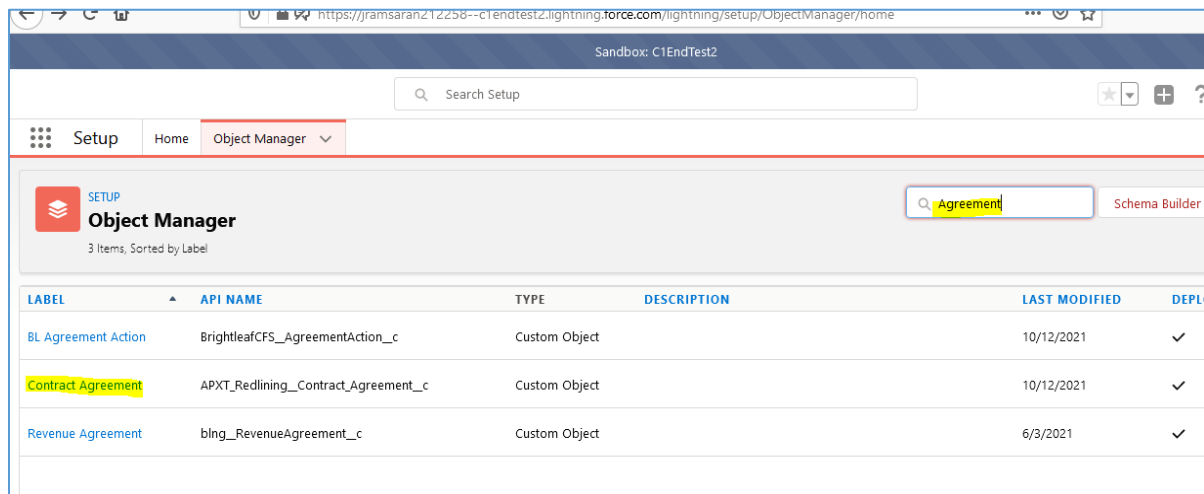4.2.8 If there are no list of IP ranges, then add it as per client requirement.

5.   Import Status & Related List Configuration on Agreement layout

After package installation, add the below field on the Agreement layout.

- Brightleaf Import status

Steps:

5.1   Click on the Gear icon on the top right side. Go to Set up.

5.2   Click on Object Manager tab

5.3   In Quick Find text field, type "Agreement". From the list, look for "Contract Agreement"

5.4   Click on "Contract Agreement"

5.5   Click on "Page Layouts" from Left pane

5.6   Click on "Contract Agreement Layout" from the Right pane
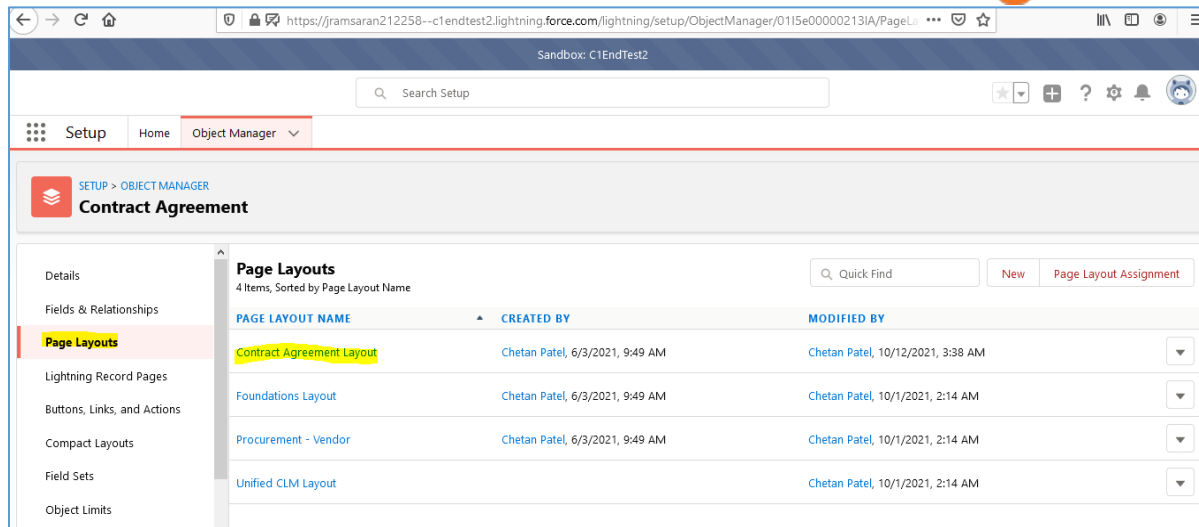
5.7   In the Quick Find box, type Status

5.8   Drag and Drop the Import Status field in the list of fields
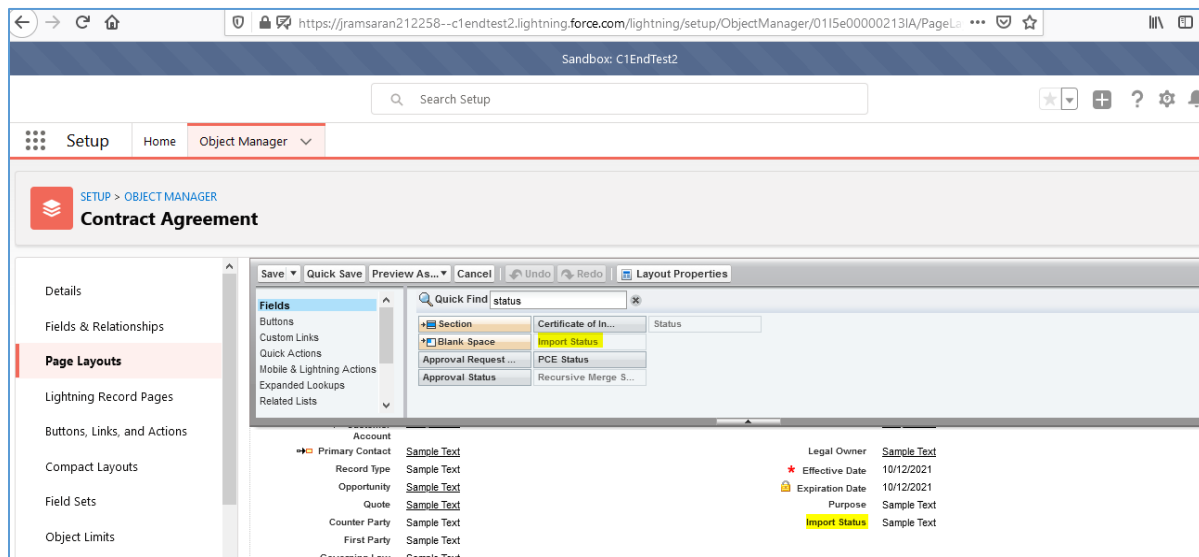
After Import Status is configured, next step is to add the related list tabs, add the below tabs on the Agreement layout.
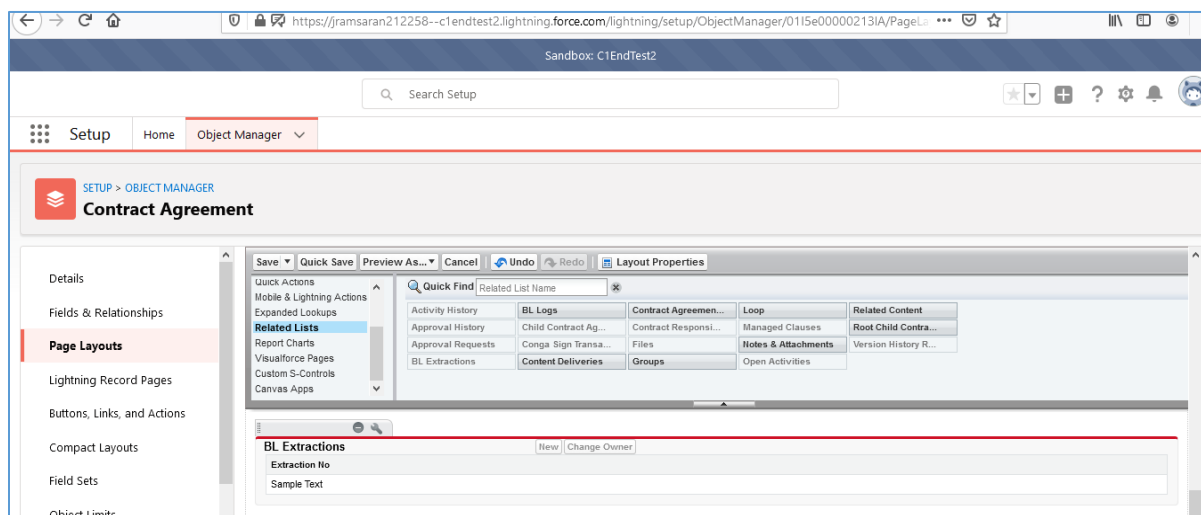
- BL Logs

- BL Extraction

Steps:

5.10 In the "Contract Agreement Layout", from the Fields list box, click on Related Fields List. The list of fields will be shown. In the available list, "BL Logs" and "BL Extraction" are present.
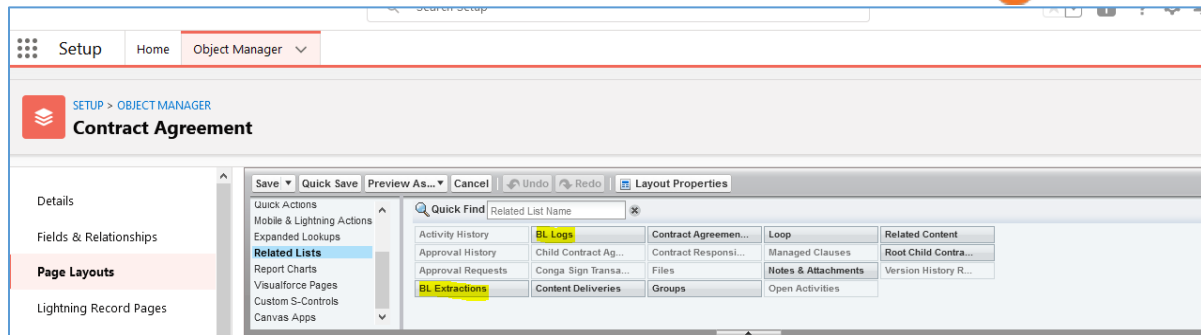
5.11 Select "BL Extractions" and drag and drop it on the page wherever would like to appear

5.12 Similar way, select "BL Logs" and drag and drop it on the page wherever would like to appear

5.13 Click on Save

6.   BL AgreementActions component on the Agreement page

Add the BL AgreementActions lightning component on the Agreement lightning page

Steps:

6.1   In the Object Manager Tab, click on "Lightning Record Pages" from the left.

6.2   Click on MSA

6.3   Click on Edit

6.4   From the left pane of "Page Builder" layout, in the search box type "BL Agreement Actions". The option button will appear below. Drag and drop the "BL Agreement Actions" button on the right pane.
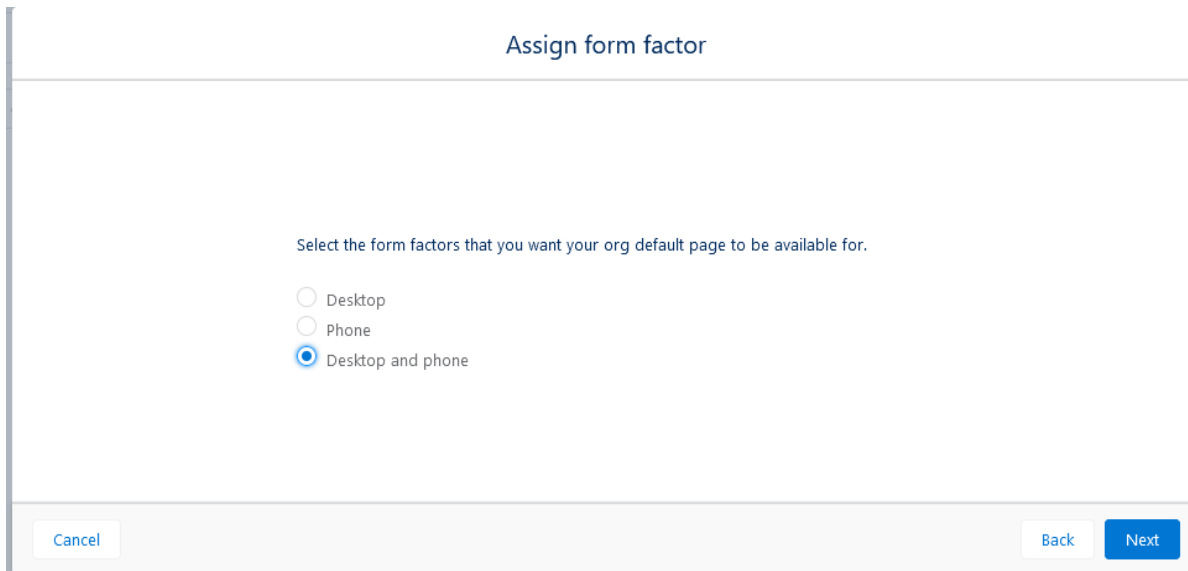
6.5   Click on Save

6.6   Click on Activation button

6.7   A popup will appear. In that popup, click on "Assign as Org Default"
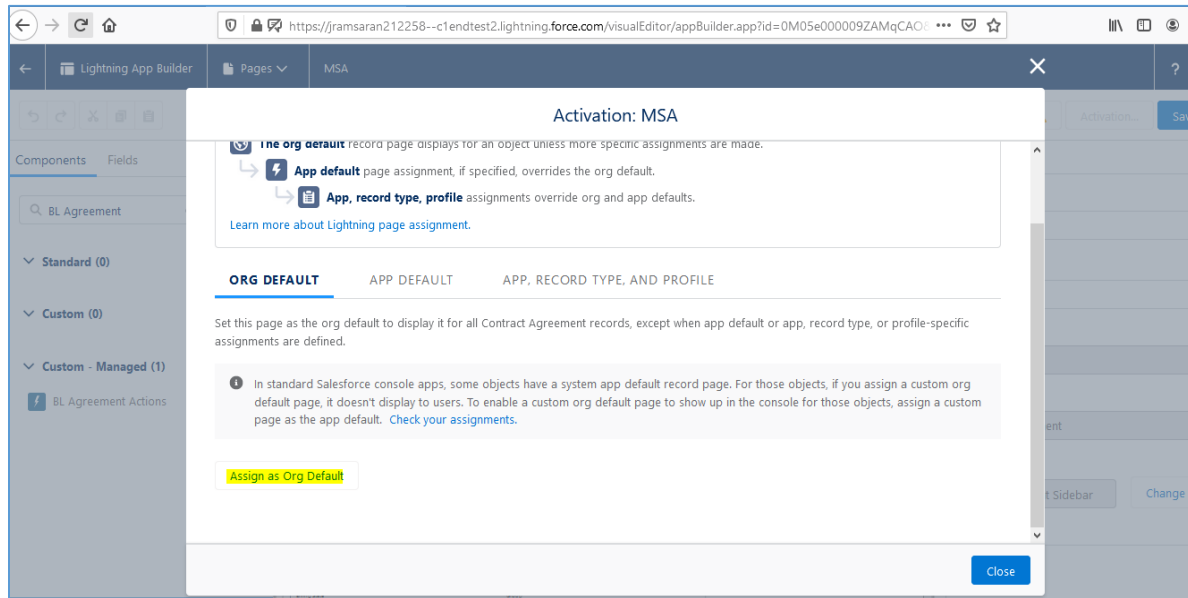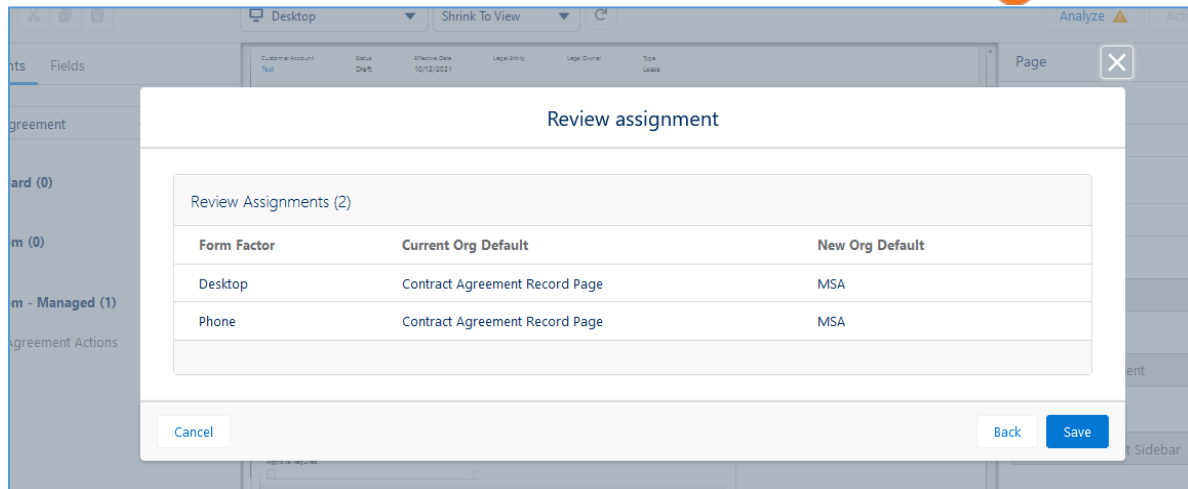

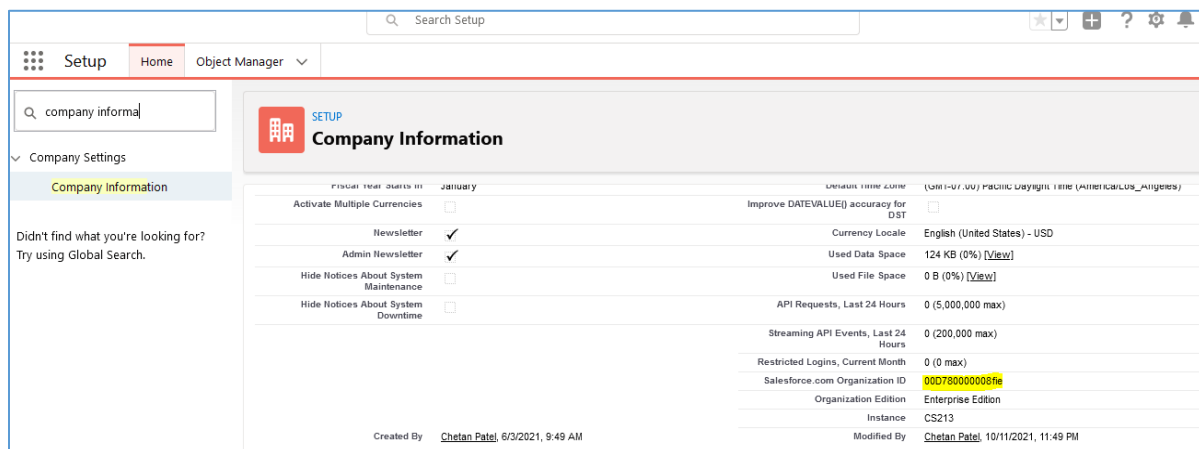6.8   Click on "Desktop and Phone"

6.9   Click on Next

6.10   Click on Save

6.11   Click on Activation

6.12   Click on Back button on the left side

6.13   Custom Agreement Action button (conditional Import/Review) will appear on the Agreement Details page when any Agreement record is created

7.   Organization Id on Company Information page.

Capture the organization Id from the Company Information page

Steps:

7.1   Click on the Gear icon, go to Set up

7.2   In Quick Find box, type "Company Information". Look for field "Salesforce.com Organization Id". Copy the Org Id. The Org Id is shown in below screenshot.
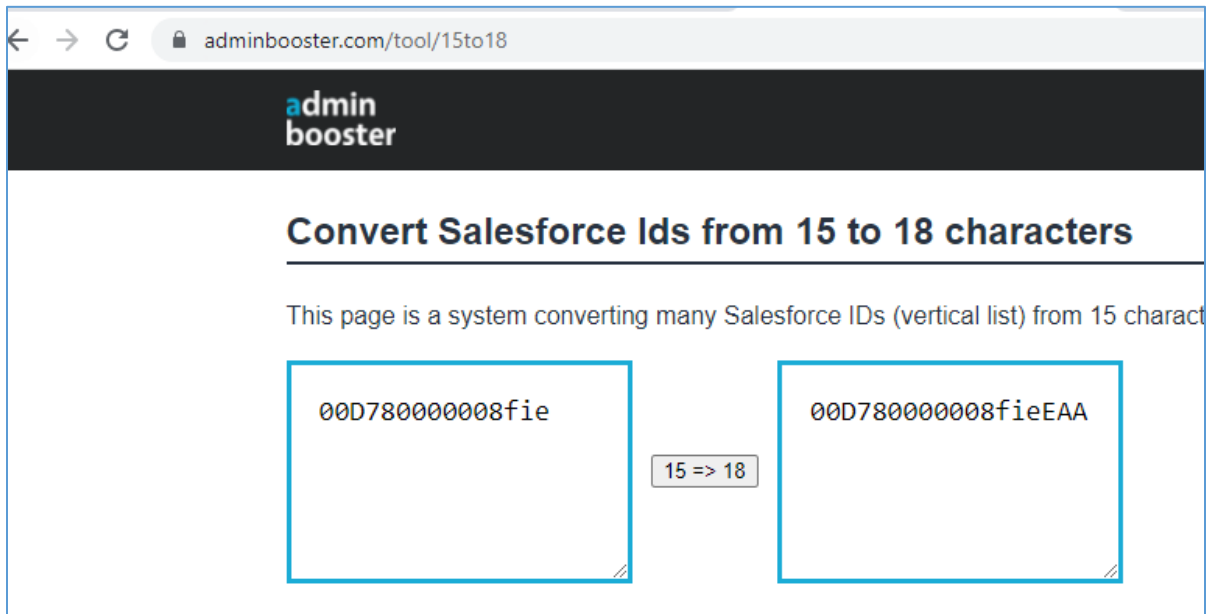
8. Convert 15 Digit SF Id to 18 Digit SF Id

All SF Org Ids are of 15 digits. The 15-digit Org Id is to convert to 18-digit Id

8.1   Use below link for converting 15-digit Org Id to 18 digits

https://www.adminbooster.com/tool/15to18

8.2   Copy the 15-digit Org left side and click on "15 => 18" button. The 18-digit Org Id will appear at right side.

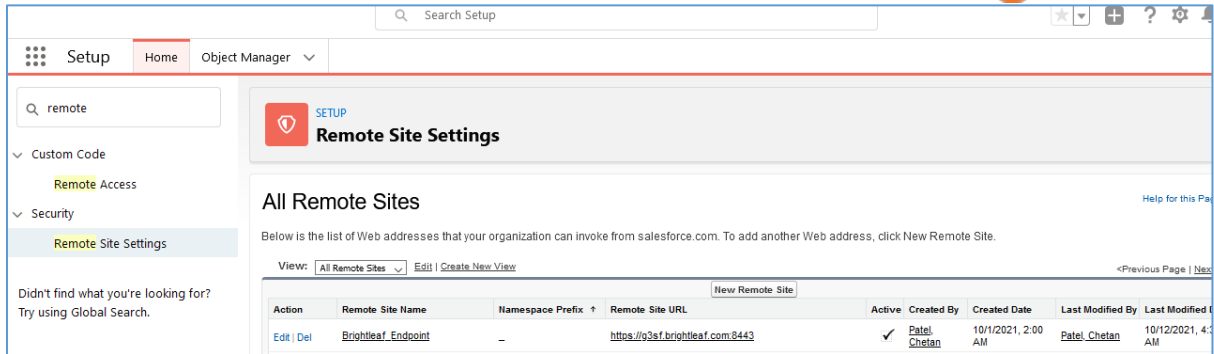## 9.   Brightleaf End Points at Salesforce Org

In the Salesforce Org, the end point with which it connects with Brightleaf is configurable. If the end point doesn't point to https://preprod.brightleaf.com, then follow below steps to change the end point, else ignore the below steps.

Steps:

9.1   Click on Gear Icon and Go to Set up

9.2   In the Quick Find box, type "Remote Site Settings"

9.3   Click on Brightleaf Endpoint

9.4   Click on Edit

9.5   Change the End Point to

https://preprod.brightleaf.com

9.6   Again, click on Gear Icon and Go to Set up

9.7   In the Quick Find box, type "Custom Settings"

9.8   Click on "BL Integration Server Details"

9.9   Click on Manage
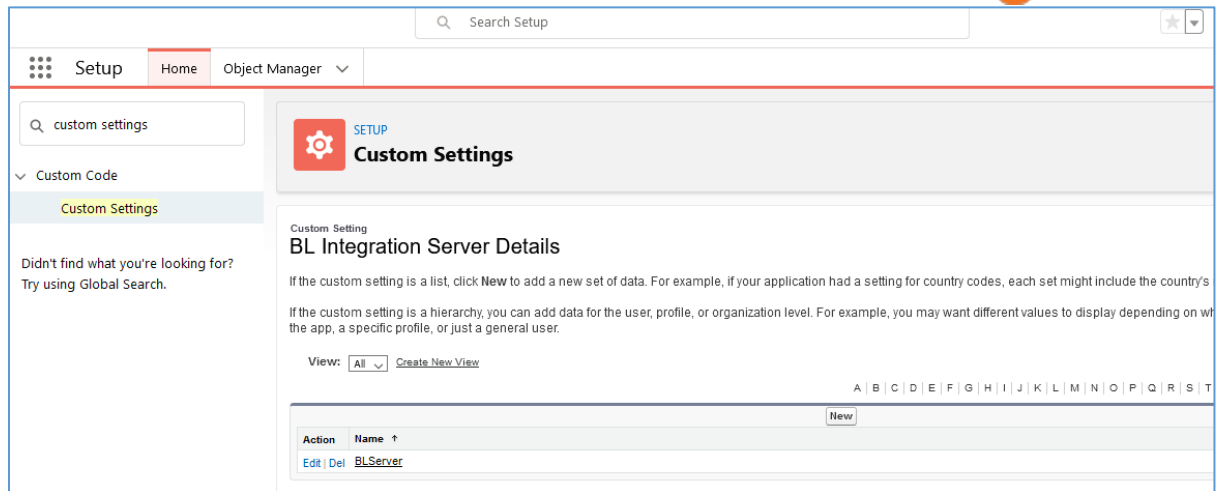
9.10   Click on BLServer
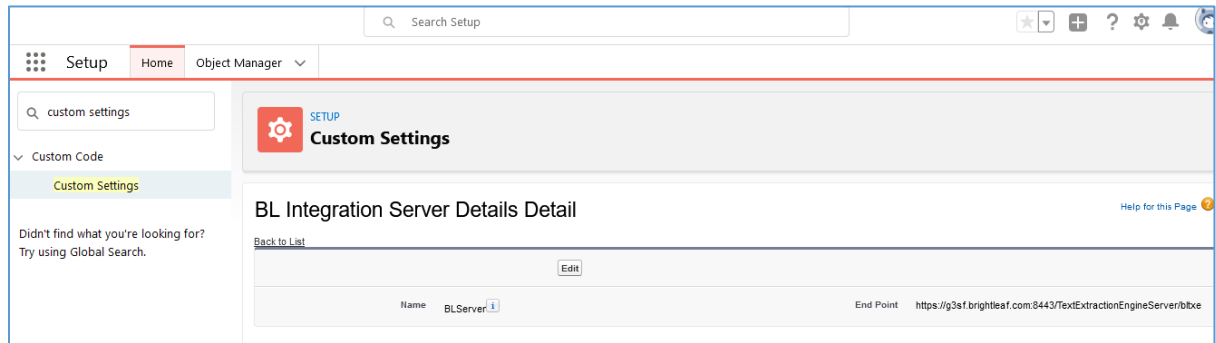
9.11   Click on Edit

9.12   Change the End Point to

https://preprod.brightleaf.com/TextExtractionEngineServer/bltxe

9.13   Click on Save
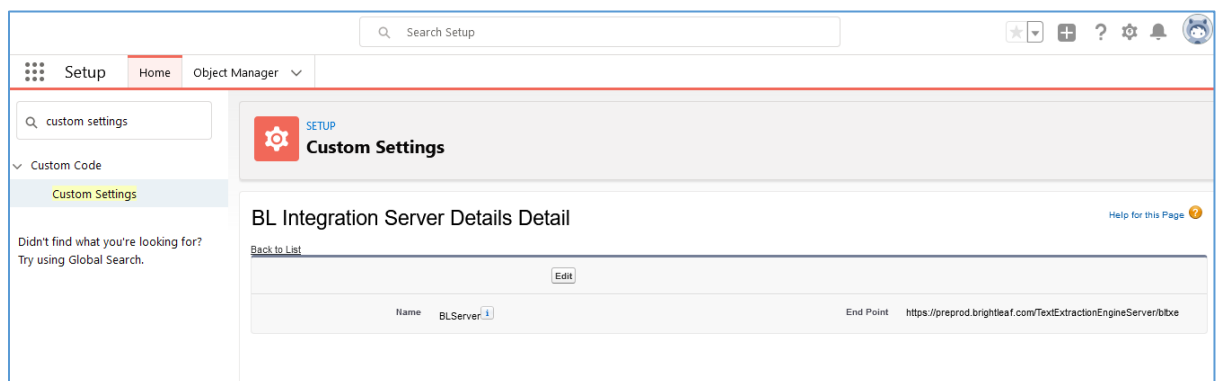
10.   Share Details with Brightleaf

Client Id & Client secret is fixed for all the Orgs. For the Brightleaf Connected App to work, some configuration is required at the Brightleaf side. For this, following details are to be shared with Brightleaf:

- **Client Id:**
  3MVG9fe4g9fhX0E45sVc_AUd6WdcUPON_xpsCD0g358tUF8r.K.cacpeNzTEwbF9SNaDbyRatdyTKdRa eR0EN

- **Client Secret:** F32C06481CC160DA22CF1273426175FE6F9B2F4AFBE0925B91AA0972D24FB8D0

- **Integration User Name:** Integration user name which is created

- **Integration User Password:** Integration user password which is created

- **Org Id:** Saleforce Org Id in which the Brightleaf TPP package is installed

- **Managed/Unmanaged:** The Org is Managed or Unmanaged

- **A1/C1:** The Org Type whether it is A1 or C1 Org

Brightleaf will register the Org details into its application and configure the required attributes at both Brightleaf and Salesforce side.

> **Above information should be shared with Brightleaf at tpp_conga_support@brightleaf.com with subject "Brightleaf Connected App - Integration User Details"**

11.   Brightleaf for Salesforce Support

Reach out to Brightleaf for Salesforce Support for Salesforce-specific questions. For example, questions about your package Brightleaf with anything outlined in our Help articles.

Brightleaf for Salesforce Support can be reached by email at tpp_conga_support@brightleaf.com.