

# Upgrade Version Guide

## Whistic Managed Package for Salesforce.com

26Apr2024



# Upgrade Preparations

1. New Installs
  - a. If you are doing a new install instead of an upgrade, please contact Whistic for that guide.
2. Whistic Connections
  - a. If you wish to connect Whistic to a new Salesforce org, your Whistic Admin can provide a new key:
    - i. Whistic.com > Admin Tools > Company Settings > Integrations > API Key > Generate New Key
  - b. Manage Existing Connections:
    - i. Whistic.com > Admin Tools > Company Settings > Salesforce
3. Permission Sets
  - a. In order for Salesforce Users to have access to share profiles, they will need to have the Whistic Admin and/or Whistic User permission set assigned to them in Salesforce. This was created in order to restrict unauthorized access to Whistic profile sharing within Salesforce but retain visibility of shares for unauthorized Salesforce users. In Salesforce> Permission Sets> Whistic User> Manage add all users that you would like to have access to the sharing capabilities.

# Upgrade

Whistic Managed Package v1.34.3:

1. Whistic Admin permission set required for all steps.
2. Salesforce Admin Only
  - a. Install Upgrade
    - i. Sandbox (Recommended First):  
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PnV2>
    - ii. Production:  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PnV2>
  - b. Reconnect App
    - i. Salesforce.com > Whistic app > Getting Connected > Edit > Check Connection (even if blank)
3. Test
  - a. Continue with usual testing for your organization's unique configurations & requirements.
  - b. If there are any profile share timeouts, please repeat Step 2b.
  - c. Some accounts may require additional configurations to Share Settings that give profile senders edit access to accounts or object which they do not own.

# Upgrade

 **Upgrade Whistic Profile**  
By

 **An earlier version is installed. It can be upgraded while preserving the existing data.**  
Installed: Jan 14 2021 (1.18)    New Version: May 2021 (1.19 (Beta 6))

**Install for Admins Only**

**Install for All Users**

**Install for Specific Profiles...**

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. 

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

App Name	Publisher	Version Name	Version Number
Whistic Profile		May 2021	1.19 (Beta 6)

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

1. Choose to Install for Admins Only or for All Users
2. Check the Acknowledgement box
3. Click "Install"

# Upgrade

**Approve Third-Party Access**

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
api.whistic.com	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

**Continue** **Cancel**

1. Check the grant checkbox
2. Click "Continue"

# Upgrade



## Upgrade Whistic Profile

By

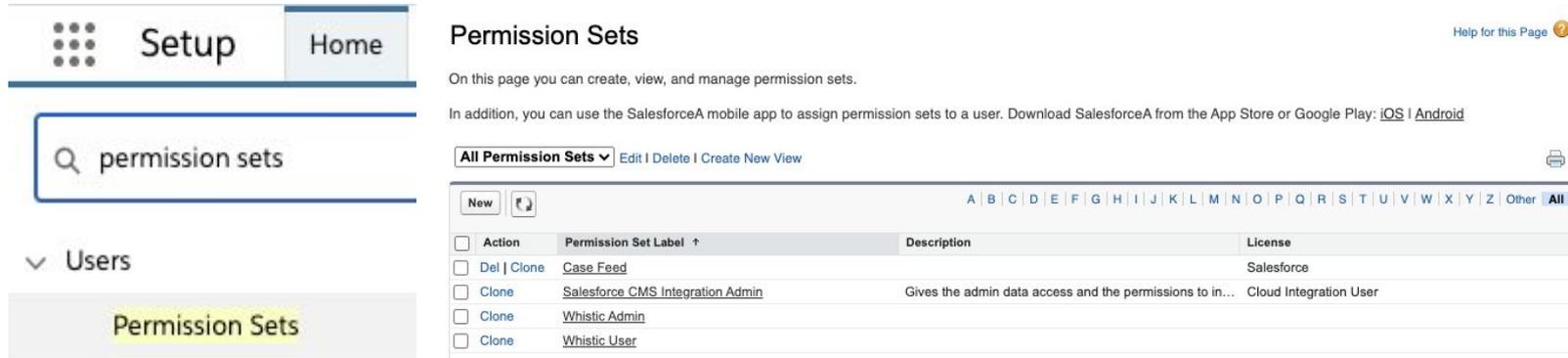
 **Upgrading and granting access to all Users...**

App Name	Publisher	Version Name	Version Number
Whistic Profile		April 2021	1.19 (Beta 1)

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

1. Wait for upgrade to be confirmed successful.
2. Sometimes this may take longer and Salesforce.com will send an email on completion.
3. We test thoroughly on our side, but we recommend your team review any functionality you can to be extra sure.

# Permission Sets: \*Required for Sharing\*



The screenshot shows the Salesforce Setup interface for Permission Sets. The top navigation bar includes 'Setup' and 'Home' tabs. A search bar contains the text 'permission sets'. Below the search bar, there is a 'Users' dropdown menu and a 'Permission Sets' button. The main content area is titled 'Permission Sets' and includes a help link 'Help for this Page'. Below the title, there is a description: 'On this page you can create, view, and manage permission sets.' and a note: 'In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'. A dropdown menu shows 'All Permission Sets' with options for 'Edit', 'Delete', and 'Create New View'. Below this is a table of permission sets.

Action	Permission Set Label ↑	Description	License
<input type="checkbox"/> Del   Clone	<a href="#">Case Feed</a>		Salesforce
<input type="checkbox"/> Clone	<a href="#">Salesforce CMS Integration Admin</a>	Gives the admin data access and the permissions to in...	Cloud Integration User
<input type="checkbox"/> Clone	<a href="#">Whistic Admin</a>		
<input type="checkbox"/> Clone	<a href="#">Whistic User</a>		

1. Now add the permission sets to the appropriate users.
  - a. For full admin and testing access, use both permission sets.
2. Add the “Whistic Admin” permission set to the SF Admin setting up the managed package (limited access).
3. Add the “Whistic User” permission set to the users who you would like to be able to share Whistic profiles via Salesforce.
4. Some accounts may require additional configurations to Share Settings that give profile senders edit access to accounts or object which they do not own .

# Configuration (Optional)

1. The Whistic Profile Shares component can be added to the Account, Opportunity, Contact, and Lead record pages.
2. Navigate to the record page and click the Setting icon, then select "Edit Page"

The screenshot displays the Whistic CRM interface. At the top, there is a search bar and a navigation menu with items like Whistic, Security Profiles, Contacts, Opportunities, Accounts, Reports, Home, and Error Details. The 'Opportunities' menu item is highlighted. Below the navigation, the main content area shows an 'Opportunity' record for 'Test Account'. The record details include: Close Date (3/12/2021), Product ARR (\$0.00), Days Since Last Opp Stage Change, Number of Close Date Changes (0), and V2C (checkbox). A stage progression bar at the bottom shows stages: Evaluation - Sta..., Propose - Stage 3, Selected - Stag..., Negotiate - Sta..., and Closed. A 'Mark Stage as Complete' button is visible. On the right side, a settings menu is open, showing options: Setup, Developer Console, Edit Page, and Edit Object. The 'Edit Page' option is highlighted, and the entire settings menu is enclosed in a red rounded rectangle.

Close Date	Product ARR	Days Since Last Opp Stage Change	Number of Close Date Changes	V2C
3/12/2021	\$0.00		0	<input type="checkbox"/>

# Configuration (Optional)

1. Confirm that you can edit any part of the page first. Your company may be using managed package page layouts which cannot be edited.
2. Select the "Whistic Profile Shares" component from the "Custom" section of the components list and drag to the desired position on the page.

The screenshot displays the Lightning App Builder interface for configuring an 'Opportunity Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. Below the navigation bar are various controls for viewports (Desktop, Shrink To View) and actions (Analyze, Activation..., Save). The main workspace shows a preview of the page layout with a 'Whistic Profile Shares' component visible. On the left, the 'Components' panel is open, showing a search for 'whistic' and a list of components under the 'Custom - Managed (3)' category, which is highlighted with a red box. The components listed are 'Whistic Connection Configuration', 'Whistic Profile Shares', and 'whisticOrgConnect'. The right-hand side of the interface shows the configuration options for the 'Whistic Profile Shares' component, including 'Path to Account Record' (set to 'AccountId'), 'History Display Fields', and 'Set Component Visibility' (with an 'Add Filter' button).

# Configuration (Optional)

1. Click on the Whistic Profile Shares component that is now on the page.
2. For Opportunity and Account record pages, the "Path to Account Record" field is required. The value for this field for the Opportunity page should be "AccountId". For the Account page, it should be "Id". For the Contact and Lead record pages, leave this field blank.

The screenshot displays the Lightning App Builder interface for configuring an Opportunity Record Page. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. The main workspace shows a preview of the record page with a 'Whistic Profile Shares' component highlighted. The configuration panel on the right, titled 'Page > Whistic Profile Shares', contains the following fields:

- Path to Account Record:** A text input field containing 'AccountId', highlighted with a red box.
- History Display Fields:** An empty text input field.
- Set Component Visibility:** A section with a filter button labeled '+ Add Filter'.

The main preview area shows a sample record for 'Test Account' with the following details:

- Close Date:** 3/12/2021
- Product Amt:** \$0.00
- Days Since Last Opp Stage Change:** 0
- Number of Close Date Changes:** 0
- VIC:**

The record is in the 'Evaluation' stage. The 'Whistic Profile Shares' component is configured with the following settings:

- Profile:** Key WhicHer
- Share:** Map 13.2
- Role:** ACCPTFD
- Status:** Successful

The 'Related' section shows the following components:

- Products (0)**
- Gong Conversations (0)**
- Opportunity Field History (1)**

The 'Opportunity Field History' component shows the following details:

- Date:** 2/17/2021 11:55 AM
- Field:** Created
- User:** Minya Anderson
- Original Value:**
- New Value:**

# Configuration (Optional)

1. (Recommended) You can skip this entire page and leave this field blank for default columns.
2. (Advanced) Customizing the columns is currently recommended only for advanced users. This field accepts a comma-separated list of field api names relative to the Profile Share Contact object. You can include fields from related objects using dot notation. By default, the Name, Share Date, and NDA Status are already included. The comma separated string values for those three fields are below.

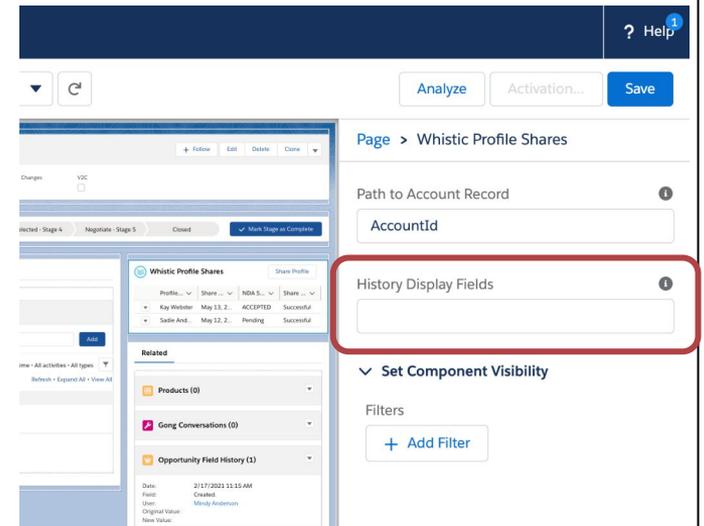
## For Accounts, Opportunities, or Contact:

whistic\_profile\_\_Contact\_Id\_\_r.Name,  
whistic\_profile\_\_Profile\_Share\_\_r.whistic\_profile\_\_Share\_Date\_\_c,  
whistic\_profile\_\_Profile\_Share\_\_r.whistic\_profile\_\_NDA\_Status\_\_c

## For Leads:

whistic\_profile\_\_Lead\_Id\_\_r.Name,  
whistic\_profile\_\_Profile\_Share\_\_r.whistic\_profile\_\_Share\_Date\_\_c,  
whistic\_profile\_\_Profile\_Share\_\_r.whistic\_profile\_\_NDA\_Status\_\_c

*Note the double underscores after the "Whistic\_Profile" namespace, rather than a single underscore like you see everywhere else.*



# Configuration (Optional)

1. In order to save your changes, you must both save and activate. Depending on how your Salesforce is configured, the activation step may be automatic or not.
2. Once this component is added to your page, we recommend you or your Whistic Admin confirm everything is working as expected by submitting a share and reviewing your Whistic Customer Catalog. Happy sharing!

The screenshot displays the Lightning App Builder interface for an 'Opportunity Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. A toolbar at the top right contains 'Analyze', 'Activation...', and 'Save' buttons, with the 'Activation...' button highlighted by a red box. The main workspace shows a preview of the 'Opportunity Test Account' record page, which includes a progress bar for stages (Evaluation, Propose, Selected, Negotiate, Closed) and a 'Whistic Profile Shares' component. The component configuration panel on the right is titled 'Page > Whistic Profile Shares' and includes sections for 'Path to Account Record' (set to 'AccountId'), 'History Display Fields', and 'Set Component Visibility'. The 'Set Component Visibility' section has an 'Add Filter' button. The bottom left of the interface shows a 'Components' panel with a search bar containing 'whistic' and a list of components: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (3)'. The 'Custom - Managed (3)' section lists 'Whistic Connection Configuration', 'Whistic Profile Shares', and 'whisticOrgConnect'.