

Installation Guide

Whistic Managed Package for Salesforce.com

26Apr2024

Pre-installation steps

1. Verify that your Salesforce edition is Lightning Enterprise or higher. We do not support the Classic edition.
2. Verify with your CSM that the Salesforce feature is enabled for your account. If you would like to send tests to yourself, they will also need to turn on the “share with own company” option.
3. Enable your profiles(s) in Whistic by going to each Profile, click Edit, then the Salesforce button and select the toggle to turn on the profile for SF (make sure to save changes)
4. Securely/privately obtain a Whistic.com API Key from your Whistic Admin who is able to generate it in the Whistic Company Integrations Settings.

1. Whistic managed package v1.34.3:

- a. Production: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PnV2>
- b. Sandbox: <https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5w000005PnV2>

* If the package is already installed in Sandbox environment-- before installing in Production, delete the API token (not the key) in Company Settings > Integrations > Salesforce before re-installing in Production (only for going from sandbox to production).

2. Configure Connected App settings for Authentication
3. Assign Permission Sets to those users whom you would like to have access
4. Connect your Salesforce.com org to Whistic API Server

Please execute each page in this guide to make sure everything is set up consistently and correctly.

Installation



Install Whistic Profile

By Whistic Packaging

 **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	Whistic Packaging	December 2023	1.34.1

Additional Details [View Components](#)

1. Choose to Install for Admins Only or for All Users
2. If you install for All Users, you can still determine who has access using Permissions
3. Check the Acknowledgement box
4. Click "Install"

Installation

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.co	<input checked="" type="checkbox"/>
api.whistic.com	<input checked="" type="checkbox"/>
api.whistic.io	<input checked="" type="checkbox"/>
external.whistic.co	<input checked="" type="checkbox"/>
external.whistic.com	<input checked="" type="checkbox"/>
external.whistic.io	<input checked="" type="checkbox"/>

Yes, grant access to these third-party web sites

[Continue](#) [Cancel](#)

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

Installation



Install Whistic Profile

By Whistic Packaging

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

App Name	Publisher	Version Name	Version Number
Whistic Profile	Whistic Packaging	December 2023	1.34.1

Additional Details [View Components](#)

1. Wait for installation to be complete
2. Sometimes this may take longer and Salesforce.com will send an email on completion

Connected App Settings

Connected Apps

[Help for this Page](#) 

Manage access to apps that connect to this Salesforce organization.

App Access Settings Edit

Allow users to install canvas personal apps

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Action	Master Label ↑	Application Version	Permitted Users
Edit	 Whistic Profile App Connection	28.0	All users may self-authorize

1. Go to “Manage Connected Apps” (Setup | Apps | Connected Apps | Manage Connected Apps)
2. Click on the “Whistic Profile App Connection”

Connected App Settings

Connected App Whistic Profile App Connection

Help for this Page

Connected App Detail

[Edit Policies](#) [Uninstall](#)

Version 28
Description



System Info

Installed By	Sam Smith	Installed Date	9/2/2020, 7:33 AM
Last Modified By	Sam Smith	Last Modified Date	9/2/2020, 7:33 AM

Basic Information

Info URL	Start URL
	Mobile Start URL

OAuth Policies

Permitted Users	All users may self-authorize	IP Relaxation	Enforce IP restrictions
Usage	View OAuth Usage	Refresh Token Policy:	Refresh token is valid until revoked
Single Logout	Single Logout disabled		
Application Permissions:	Perform requests on your behalf at any time		
	Provide access to your data via the Web		
	Access and manage your data		

Session Policies

1. Click on “Edit Policies”

Connected App Settings

Connected App
Whistic Profile App Connection Help for this Page

Connected App Edit

Version 28
Description

Basic Information Required Information

Start URL: ? i Mobile Start URL: i

OAuth Policies

Permitted Users: i

Enable Single Logout: i

IP Relaxation: i

Refresh Token Policy:

- Refresh token is valid until revoked
- Immediately expire refresh token
- Expire refresh token if not used for i
- Expire refresh token after i i

Session Policies

Timeout Value: i High assurance session required

Custom Connected App Handler

Apex Plugin Class: i

Run As: i

User Provisioning Settings

Enable User Provisioning i

1. Within the “Permitted Users” dropdown, select “Admin approved users are pre-authorized”
2. Click on “Save”

Connected App Settings

Connected App
Whistic Profile App Connection

[Help for this Page](#)

Connected App Detail [Edit Policies](#) [Uninstall](#)

Version 28
Description



System Info

Installed By	Sam Smith	Installed Date	9/2/2020, 7:33 AM
Last Modified By	Sam Smith	Last Modified Date	9/2/2020, 8:24 AM

Basic Information

Info URL	Start URL
	Mobile Start URL

OAuth Policies

Permitted Users	Admin approved users are pre-authorized	IP Relaxation	Enforce IP restrictions
Usage	View OAuth Usage	Refresh Token Policy	Refresh token is valid until revoked
Single Logout	Single Logout disabled		
Application Permissions:	Perform requests on your behalf at any time		
	Provide access to your data via the Web		
	Access and manage your data		

Session Policies

Timeout Value

Custom Connected App Handler

Apex Plugin Class
Run As

User Provisioning Settings

Enable User Provisioning [?](#)

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles [Manage Profiles](#)

No profiles associated with this app.

System Administrator

[Save](#)

1. Select “Manage Profiles”
2. Check the “System Administrator”
3. Click “Save”

Permission Sets

The screenshot shows the Salesforce 'Permission Sets' management page. The left sidebar contains navigation options: 'Setup' (selected), 'Home', a search bar with 'permission sets' entered, and a 'Users' section with a 'Permission Sets' link highlighted. The main content area is titled 'Permission Sets' and includes a help link. Below the title, there is a dropdown menu for 'All Permission Sets' and a table listing existing permission sets.

Permission Sets [Help for this Page](#)

On this page you can create, view, and manage permission sets.

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](#)

All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#) [Print](#)

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

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 use the integration (component).

Connection Module

App Launcher

[Visit AppExchange](#)

▼ All Apps

 Service Manage customer service with accounts, contacts, cases, and...	 Marketing Best-in-class on-demand marketing automation	 Salesforce Chatter The Salesforce Chatter social network, including profiles and...
 Service Cloud Console	 Chatter Answers Moderator	 Lightning Usage App View Adoption and Usage Metrics for Lightning Experience
 Bolt Solutions Discover and manage business solutions designed for your...	 Sales Manage your sales process with accounts, leads, opportunities,...	 Whistic Whistic app for sharing security profiles

1. Within “App Launcher” select the “Whistic” app (square dot icon in the top left corner of the screen).

Connection Module (SF Admins Only)

The screenshot shows the Whistic interface within a Salesforce environment. The top navigation bar includes the Whistic logo, a search bar, and navigation tabs for Home, Accounts, Contacts, Leads, and Opportunities. The main content area is divided into several sections:

- Security Profiles:** A table with columns for Name, Description, Whistic Instance, and Enabled. It shows 0 items and a search bar for this list.
- NDA Bypass User Permissions:** A section with an 'Add' button and a table listing 'Salesforce Users' and 'Actions'.
- Getting Connected:** A section with a 'Create New' button, dropdowns for 'Whistic Instance' and 'API Key', an 'Edit' button, and a 'Default Instance' dropdown with an 'Edit' button. It also displays 'Package Version: 1.34'.
- Share Matrix:** A section with an 'Add' button and a table with columns for 'Salesforce Profile', 'Whistic Profile', and 'Ac...'. There is also a 'Configure' button.
- Automated Whistic Profile Access Approval:** A section with a 'Configure' button. It shows 'Access Bypass status: Disabled' and provides detailed text about automated approval for profile access based on email or company URL matches.

- Security profiles generally pull over immediately after a successful connection. If no profiles are shown, please click the refresh icon.

1. Go to the “Home” tab within the “Whistic” app.
2. Click the Edit button next to the Default Instance in the Getting Connected component
3. Paste in your API Key and click “Save & Check Connection.” This will connect your Salesforce.com Org to Whistic’s API server
4. A Green success message will appear when the connection is established.

Configuration

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: Whistic, Security Profiles, Contacts, Opportunities (highlighted), Accounts, Reports, Home, and Error Details. Below the navigation is a header for an Opportunity record titled "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. A red box highlights the settings menu in the top right corner, which contains the following options: Setup, Developer Console, Edit Page, and Edit Object.

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

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.

Lightning App Builder | Pages | Opportunity Record Page | Help

Desktop | Shrink To View | Analyze | Activation... | Save

Components

whistic

- Standard (0)
- Custom (0)
- Custom - Managed (3)**
 - Whistic Connection Configuration
 - Whistic Profile Shares
 - whisticOrgConnect

Page > Whistic Profile Shares

Path to Account Record: AccountId

History Display Fields

Set Component Visibility: Add Filter

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:** Whistic
- Share:** All
- Role:** All
- Share:** All

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:** Minda 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.

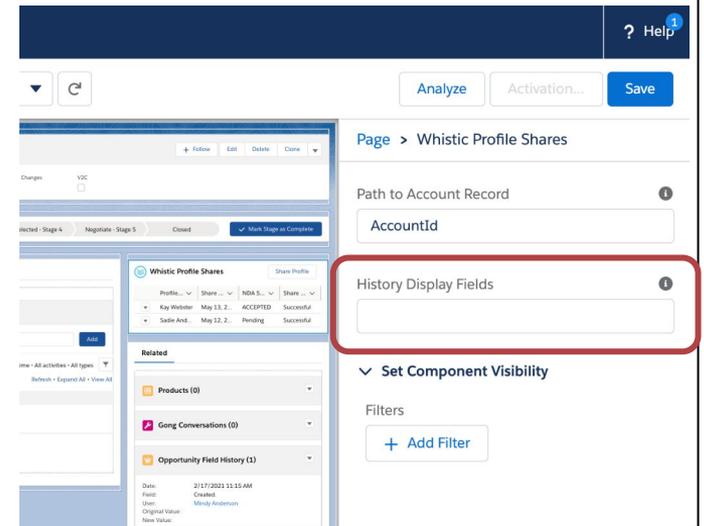
For Accounts, Opportunities, or Contact:

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

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 content area 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 'Whistic Profile Shares' component is configured with the following settings:

- Path to Account Record: AccountId
- History Display Fields: (Empty)
- Set Component Visibility: (Empty)
- Filters: (Empty)
- + Add Filter

The left sidebar shows the 'Components' panel with a search for 'whistic' and a list of components:

- Standard (0)
- Custom (0)
- Custom - Managed (3)
 - Whistic Connection Configuration
 - Whistic Profile Shares
 - whisticOrgConnect