

# Update Version Guide

## Whistic Managed Package for Salesforce.com

July 2026

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# Update Preparations

1. New Installs
  - a. If you are doing a new install instead of an update, 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.

# Update

Whistic Managed Package v1.36:

1. Whistic Admin permission set required for all steps.
2. Salesforce Admin Only
  - a. Install Update
    - i. Sandbox (Recommended First):  
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tam000006atvPAAQ>
    - ii. Production:  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tam000006atvPAAQ>
  - 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.

# Update

 **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.

Upgrade

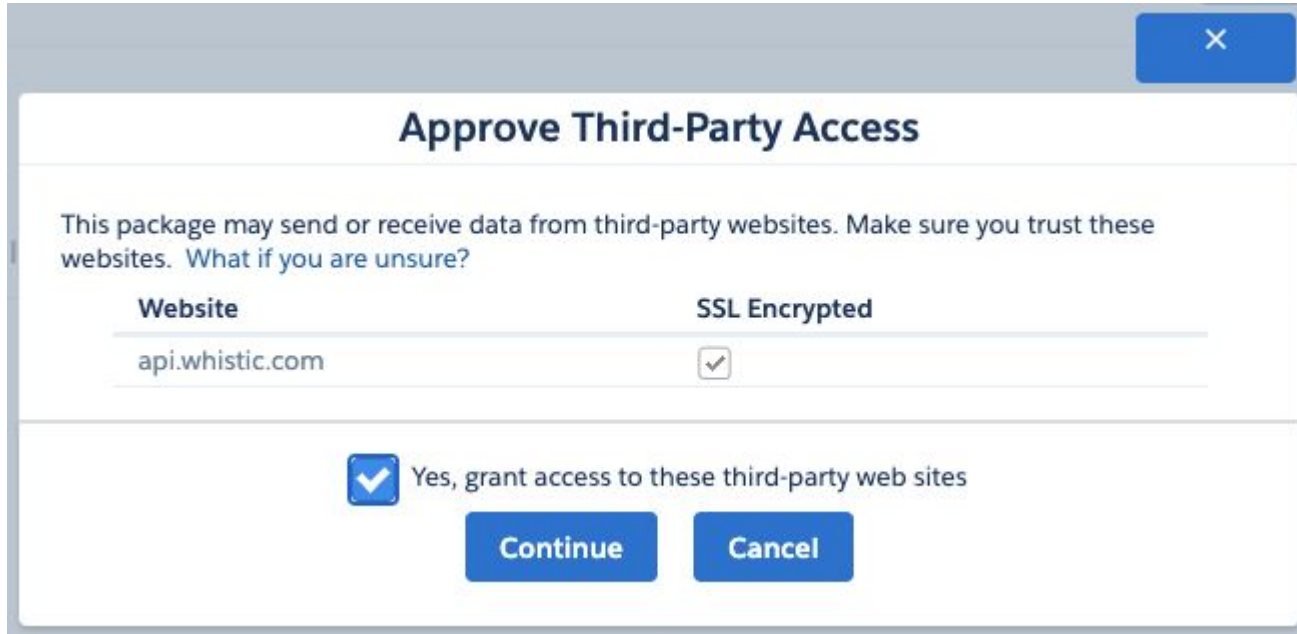
Cancel

| 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 “Upgrade”

# Update



The screenshot shows a dialog box titled "Approve Third-Party Access" with a close button (X) in the top right corner. The main text reads: "This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?". Below this is a table with two columns: "Website" and "SSL Encrypted". The first row contains the website "api.whistic.com" and a checked checkbox. At the bottom, there is a checkbox labeled "Yes, grant access to these third-party web sites" which is also checked. Below this checkbox are two buttons: "Continue" and "Cancel".

| 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"

# Update

 **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' page for 'Permission Sets'. The left sidebar has 'Setup' and 'Home' tabs, a search bar with 'permission sets', and a 'Users' section with 'Permission Sets' highlighted. The main content area is titled 'Permission Sets' and includes a help link. Below the title, it states: '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](#)'. A filter bar shows 'All Permission Sets' with options to 'Edit', 'Delete', or 'Create New View'. Below this is a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table lists four permission sets: 'Case Feed' (Salesforce license), 'Salesforce CMS Integration Admin' (Cloud Integration User license), 'Whistic Admin', and 'Whistic User'.

Setup Home

permission sets

Users

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](#)

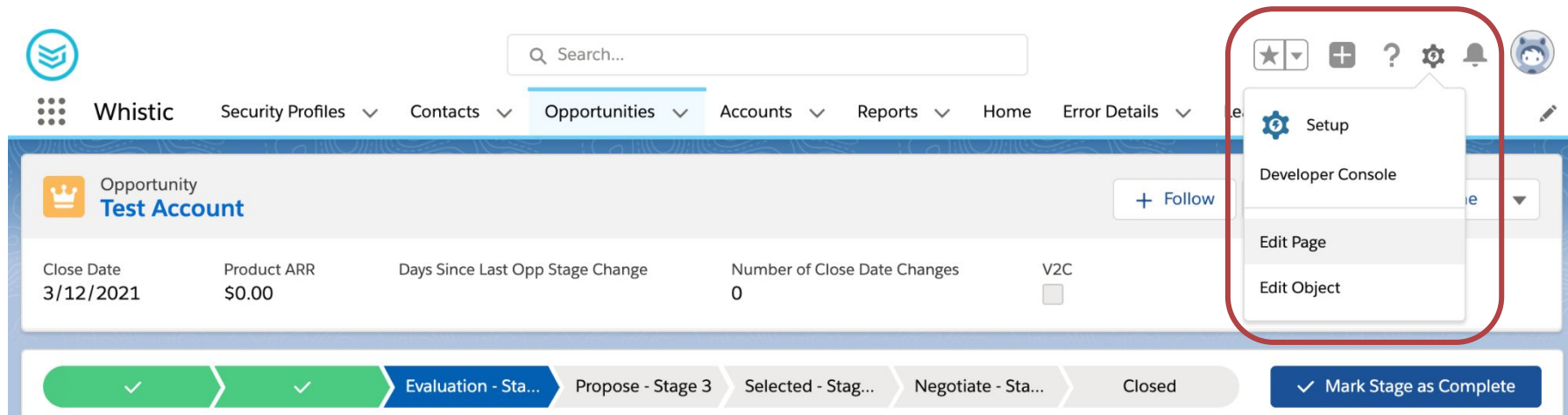
All Permission Sets Edit Delete Create New View

| 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 be able to share Whistic profiles via Salesforce.
4. Add the “Whistic NDA Bypass” permission set to users who should be able to configure NDA bypass.
5. 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. The top navigation bar includes the Whistic logo, a search bar, and various menu items: Security Profiles, Contacts, Opportunities (highlighted), Accounts, Reports, Home, and Error Details. Below the navigation bar, the 'Opportunity' section is visible, showing details for 'Test Account'. A table lists various metrics: Close Date (3/12/2021), Product ARR (\$0.00), Days Since Last Opp Stage Change, Number of Close Date Changes (0), and V2C. A red box highlights the settings menu, which includes options like 'Setup', 'Developer Console', 'Edit Page', and 'Edit Object'. The bottom of the interface shows a progress bar with stages: Evaluation - Sta..., Propose - Stage 3, Selected - Stag..., Negotiate - Sta..., and Closed. A 'Mark Stage as Complete' button is also present.

| 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 an 'Opportunity Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. Below the navigation bar, there are buttons for 'Analyze', 'Activation...', and 'Save'. The main workspace is divided into three sections: 'Components', a central preview area, and a right-hand configuration panel.

**Components Section:** A search bar contains the text 'whistic'. Below it, there are three categories: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (3)'. The 'Custom - Managed (3)' category is highlighted with a red border and contains three items: 'Whistic Connection Configuration', 'Whistic Profile Shares', and 'whisticOrgConnect'.

**Central Preview Area:** This area shows a preview of the 'Opportunity Test Account' page. It includes a header with 'Opportunity Test Account' and a table with columns: 'Close Date', 'Product AM', 'Days Since Last Opp Stage Change', 'Number of Close Date Changes', and 'VDC'. Below the table is a progress bar with stages: 'Evaluation - Stage 2', 'Propose - Stage 3', 'Selected - Stage 4', 'Negotiate - Stage 5', and 'Closed'. The 'Activity' section shows a 'Task' list with a 'Log a Call' button. The 'Whistic Profile Shares' section shows a table with columns: 'Profile', 'Share', 'MFA S...', and 'Share'. The 'Related' section shows a list of 'Products (0)', 'Gong Conversations (0)', and 'Opportunity Field History (1)'.

**Right-hand Configuration Panel:** This panel is titled 'Page > Whistic Profile Shares'. It contains three sections: 'Path to Account Record' with a text input field containing 'AccountId', 'History Display Fields' with a text input field, and 'Set Component Visibility' with a 'Filters' section containing a '+ 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 a back arrow, 'Lightning App Builder', a 'Pages' dropdown, 'Opportunity Record Page', and a 'Help' icon. Below the navigation bar are icons for undo, redo, delete, and a 'Desktop' view selector. The main workspace is divided into three sections: a left sidebar for 'Components', a central preview area, and a right sidebar for component configuration.

The 'Components' sidebar on the left shows a search bar with 'whistic' entered. Below it, there are three categories: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (3)'. Under 'Custom - Managed (3)', three components are listed: 'Whistic Connection Configuration', 'Whistic Profile Shares', and 'whisticOrgConnect'.

The central preview area shows a mockup of the Opportunity Record Page. It includes a header for 'Opportunity Test Account' with fields for Close Date, Product Amount, Days Since Last Opp Stage Change, Number of Close Date Changes, and VDC. Below the header is a progress bar with stages: Evaluation - Stage 2, Propose - Stage 3, Selected - Stage 4, Negotiate - Stage 5, and Closed. The main content area is divided into 'Activity' and 'Details' sections. The 'Activity' section shows a task log with a 'Log a Call' button. The 'Details' section shows a 'Whistic Profile Shares' component with a table of shares and a 'Related' section with links to 'Products (0)', 'Gong Conversations (0)', and 'Opportunity Field History (1)'.

The right sidebar is titled 'Page > Whistic Profile Shares'. It contains three main sections: 'Path to Account Record' with a text input field containing 'AccountId', 'History Display Fields' with a text input field, and 'Set Component Visibility' with a 'Filters' section and an 'Add Filter' button.

# 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.

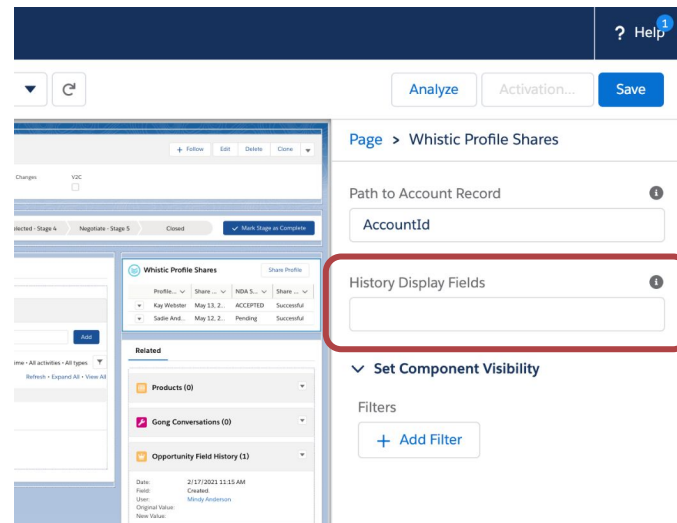
## For Accounts, Opportunities, or Contact:

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'. On the right, there are buttons for 'Analyze', 'Activation...', and 'Save', with the 'Activation...' button highlighted by a red box. The left sidebar shows the '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'. The main canvas shows a preview of the 'Opportunity Test Account' record page. The page layout includes a header with account details, a progress bar for the sales process (Evaluation, Propose, Selected, Negotiate, Closed), and a main content area with 'Activity' and 'Details' tabs. The 'Whistic Profile Shares' component is visible in the preview, showing a table of shares with columns for Profile, Share, and Status. The right sidebar shows the configuration for the 'Whistic Profile Shares' component, including 'Path to Account Record' (AccountId), 'History Display Fields', and 'Set Component Visibility' (Add Filter).