Update Version Guide

Whistic Managed Package for Salesforce.com

July 2026

Update Preparations

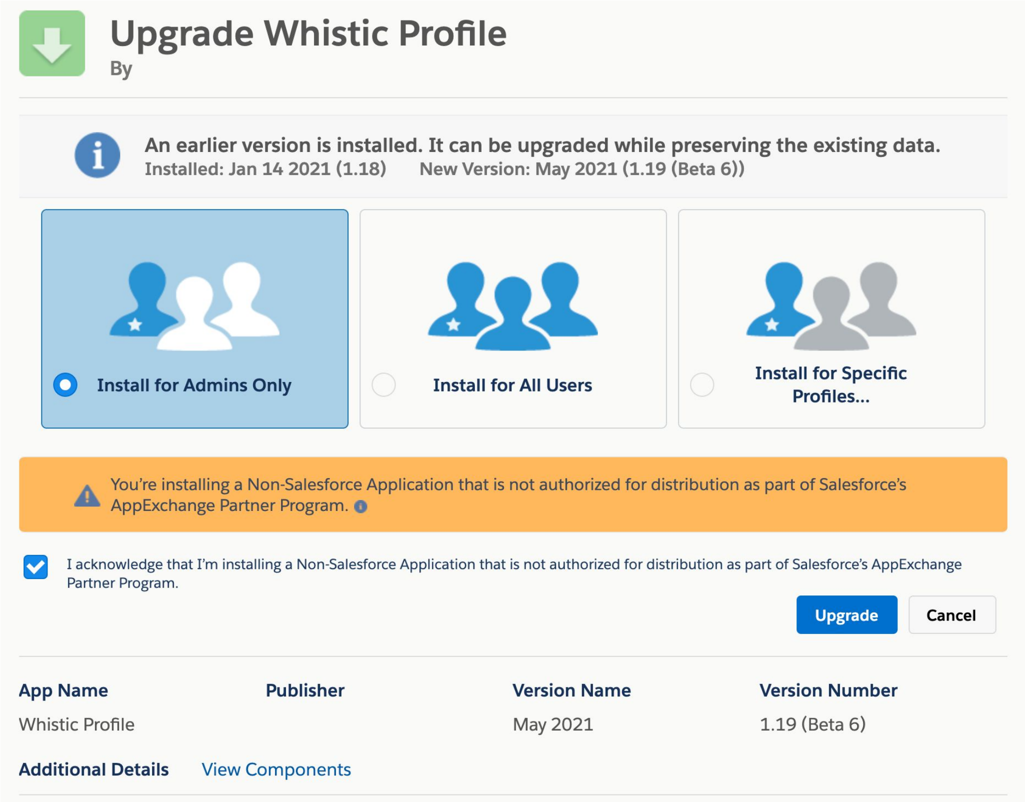
1. New Installs
    a. If you are doing a new install instead of an update, please contact Whistic for that guide.
2. Whistic Connections
    a. If you wish to connect Whistic to a new Salesforce org, your Whistic Admin can provide a new key:
        i. Whistic.com > Admin Tools > Company Settings > 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

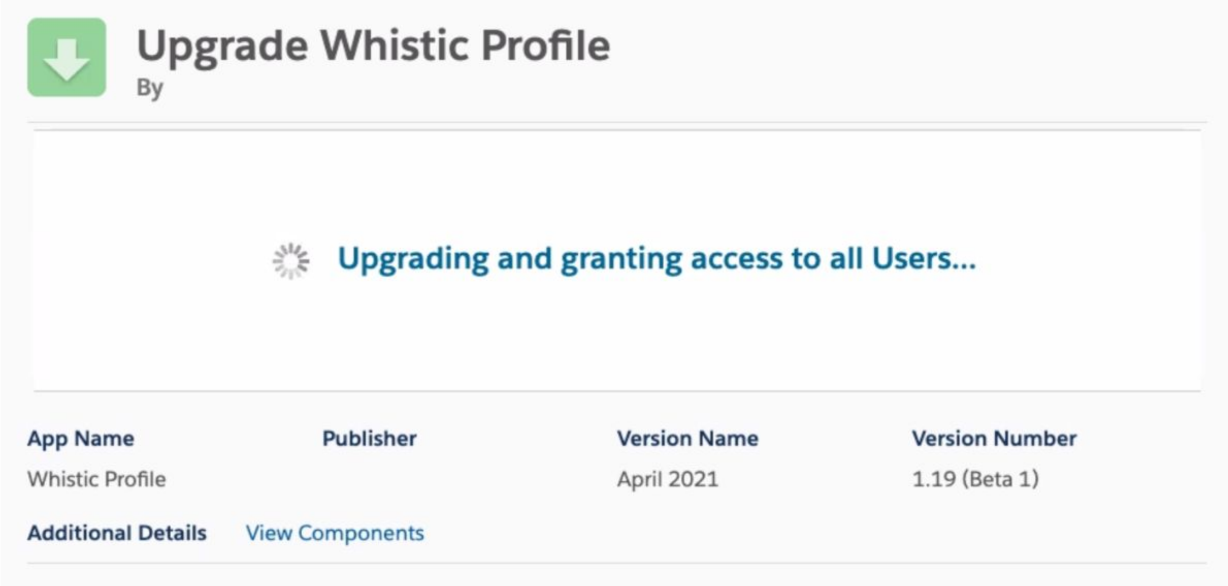


1. Choose to Install for Admins Only or for All Users
2. Check the Acknowledgement box
3. Click "Upgrade"

Update

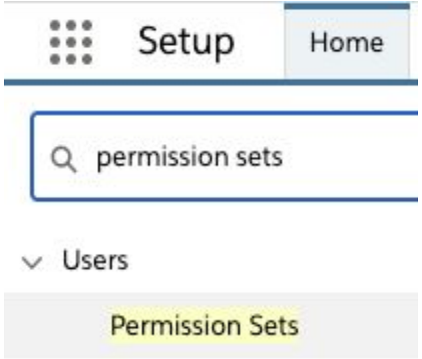
1. Check the grant checkbox
2. Click “Continue”

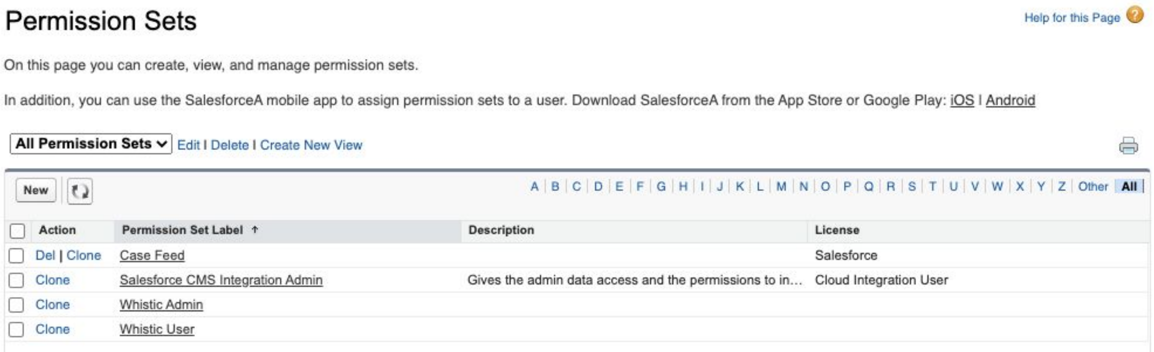
Update



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*

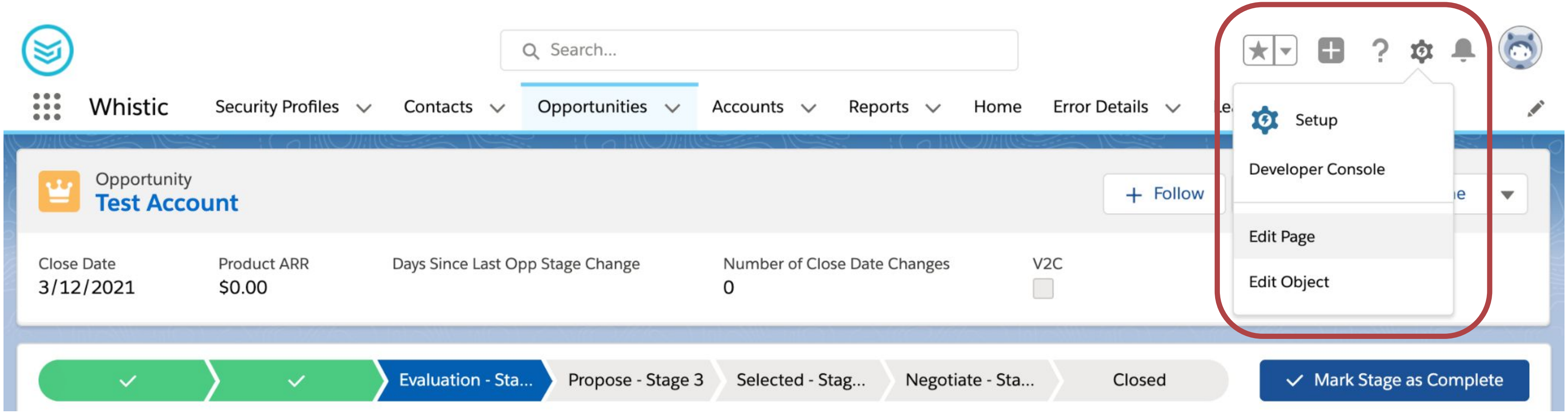




1. Now add the permission sets to the appropriate users.
   a. For full admin and testing access, use both permission sets.
2. Add the “Whistic Admin” permission set to the SF Admin setting up the managed package (limited access).
3. Add the “Whistic User” permission set to the users who you would like 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 .

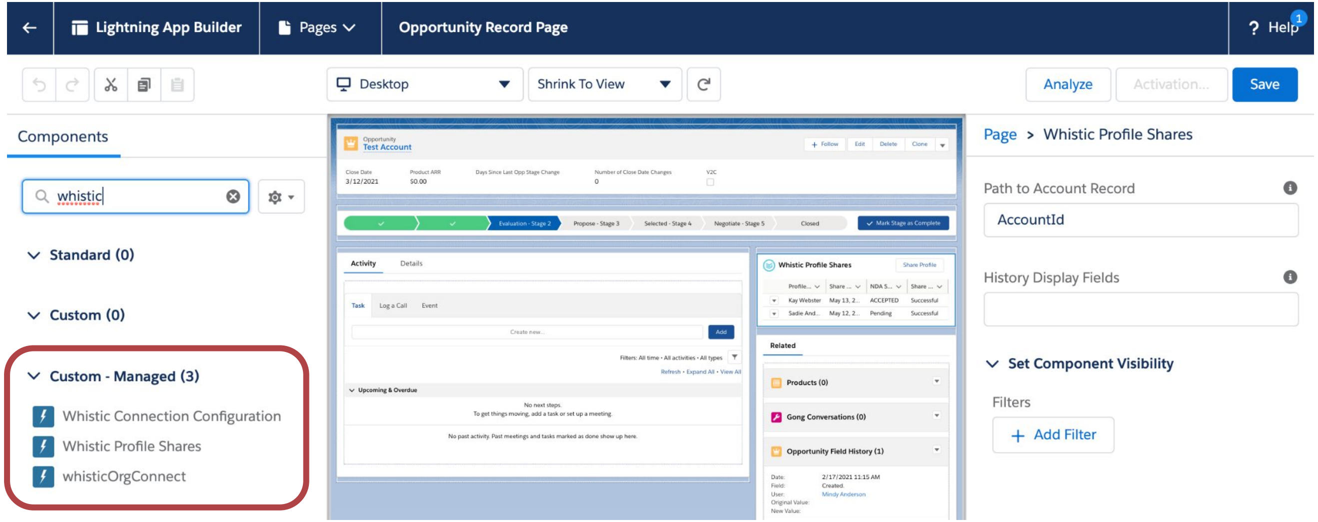
Configuration (Optional)

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"



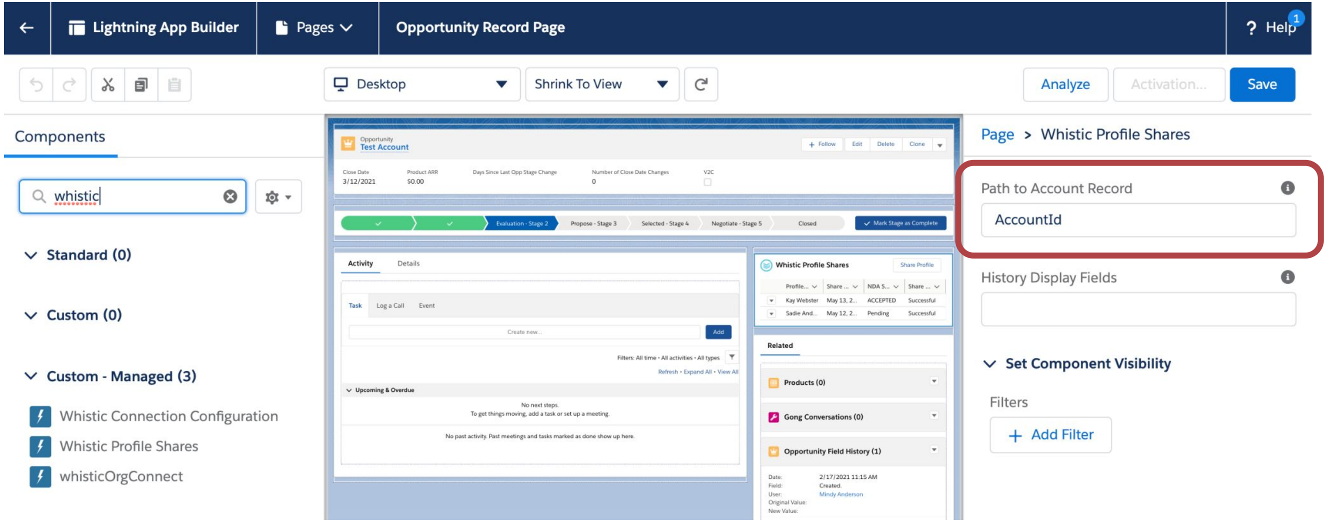
Configuration (Optional)

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.



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.



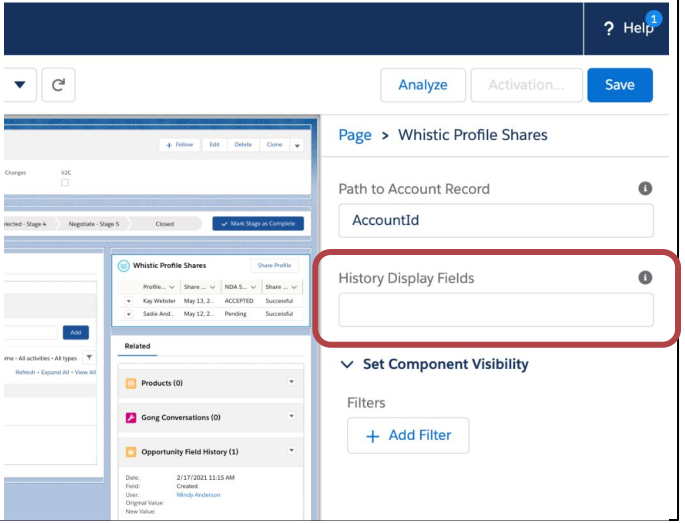
Configuration (Optional)

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!