

Installation Guide

Whistic Managed Package for Salesforce.com

July 2026

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 v1.36:

a. Production:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tam000006atvPAAQ>

b. Sandbox:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tam000006atvPAAQ>

* 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.

Install

Cancel

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 Whistic Permission Sets
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	☒
api.whistic.com	☒
api.whistic.io	☒
external.whistic.co	☒
external.whistic.com	☒
external.whistic.io	☒

☒ Yes, grant access to these third-party web sites

ContinueCancel

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
Mobile Start URL

OAuth Policies

Permitted Users **All users may self-authorize**
Enable Single Logout ☐

IP Relaxation **Enforce IP restrictions**
Refresh Token Policy:
☒ Refresh token is valid until revoked
☐ Immediately expire refresh token
☐ Expire refresh token if not used for Day(s)
☐ Expire refresh token after Day(s)

Session Policies

Timeout Value **--None--**
☐ High assurance session required

Custom Connected App Handler

Apex Plugin Class
Run As

User Provisioning Settings

☐ Enable User Provisioning

Save

Cancel

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

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.

[Help for this Page](#)



System Administrator

Save

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

Permission Sets

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
☐ Del Clone	Case Feed		Salesforce
☐ Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to in...	Cloud Integration User
☐ Clone	Whistic Admin		
☐ 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).
4. Add the “Whistic NDA Bypass” permission set to users who should be able to configure NDA bypass.

Connection Module

App Launcher

Search apps or items...

[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 image shows two overlapping screenshots of a Salesforce interface. The top screenshot, titled 'Getting Connected', features a 'Create New' button and a table with columns for 'Whistic In...', 'Environ...', 'API Key', 'Edit', and 'Delete'. The table contains one row for 'Default Instance' with 'Edit' and 'Delete' buttons. Below the table, it says 'Package Version: 1.36'. The bottom screenshot, titled 'Edit Connection', is a modal form with two required fields: 'Whistic Environment' (a dropdown menu showing 'Whistic Production') and 'Whistic API Key' (a text input field with a masked key icon). At the bottom of the modal are 'Cancel' and 'Save & Check Connection' buttons.

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. Select the target Whistic Environment, 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.

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

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 application interface. At the top, there is a navigation bar with the Whistic logo, a search bar, and several menu items: Security Profiles, Contacts, Opportunities (highlighted), Accounts, Reports, Home, and Error Details. Below the navigation bar, 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 a 'V2C' checkbox. 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. Below the record details, there is a stage progression bar with stages: Evaluation - Sta..., Propose - Stage 3, Selected - Stag..., Negotiate - Sta..., and Closed. A 'Mark Stage as Complete' button is also visible.

Whistic

Security Profiles ▾ Contacts ▾ Opportunities ▾ Accounts ▾ Reports ▾ Home Error Details ▾

Opportunity
Test Account

+ Follow

Close Date	Product ARR	Days Since Last Opp Stage Change	Number of Close Date Changes	V2C
3/12/2021	\$0.00		0	☐

Setup
Developer Console
Edit Page
Edit Object

✓ ✓ Evaluation - Sta... Propose - Stage 3 Selected - Stag... Negotiate - Sta... Closed

✓ Mark Stage as Complete

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.

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 expandable sections: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (3)'. The 'Custom - Managed (3)' section 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 table with columns for 'Close Date', 'Product Add', 'Days Since Last Opp Stage Change', 'Number of Close Date Changes', and 'VDC'. Below the table, there is a 'Whistic Profile Shares' component preview showing a list of shares with columns for 'Profile', 'Share', 'MFA S...', and 'Share'. The preview also shows a 'Related' section with links to 'Products (0)', 'Gong Conversations (0)', and 'Opportunity Field History (1)'.

Right-hand Configuration Panel: This panel is titled 'Page > Whistic Profile Shares'. It contains several configuration options: 'Path to Account Record' (set to 'AccountId'), 'History Display Fields' (set to 'AccountId'), and 'Set Component Visibility' (set to 'Filters'). There is also 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: Components, a central preview, and a right-hand configuration panel.

Components Panel: A search bar contains 'whistic'. Below it, three categories are listed: 'Standard (0)', 'Custom (0)', and 'Custom - Managed (3)'. The 'Custom - Managed (3)' category is expanded, showing three components: 'Whistic Connection Configuration', 'Whistic Profile Shares', and 'whisticOrgConnect'.

Central Preview: This area shows a mockup of the Opportunity record page. It includes a header with 'Opportunity Test Account' and a table with columns: 'Close Date', 'Product Amt', '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 main content area is split into 'Activity' and 'Details' tabs. The 'Activity' tab shows a 'Task' section with a 'Log a Call' button and an 'Event' section. The 'Details' tab shows a 'Whistic Profile Shares' section with a table of shares.

Configuration Panel (Right): The panel is titled 'Page > Whistic Profile Shares'. It contains three sections: 'Path to Account Record' (with a dropdown set to 'AccountId'), 'History Display Fields' (with a dropdown), and 'Set Component Visibility' (with a '+ 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.

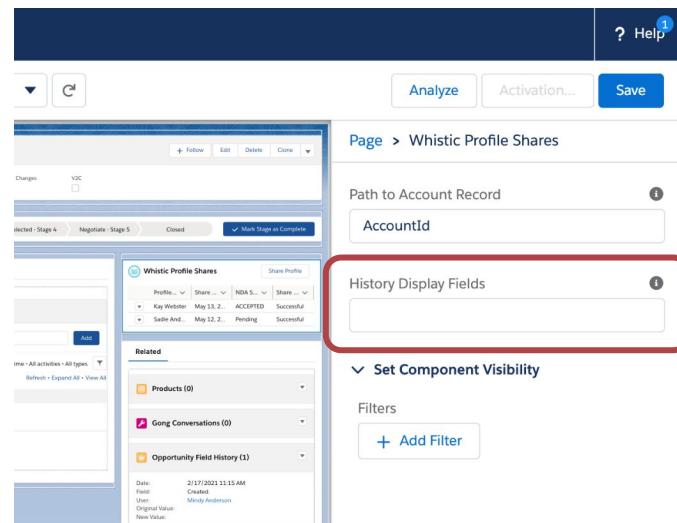
For Accounts, Opportunities, or Contact:

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:

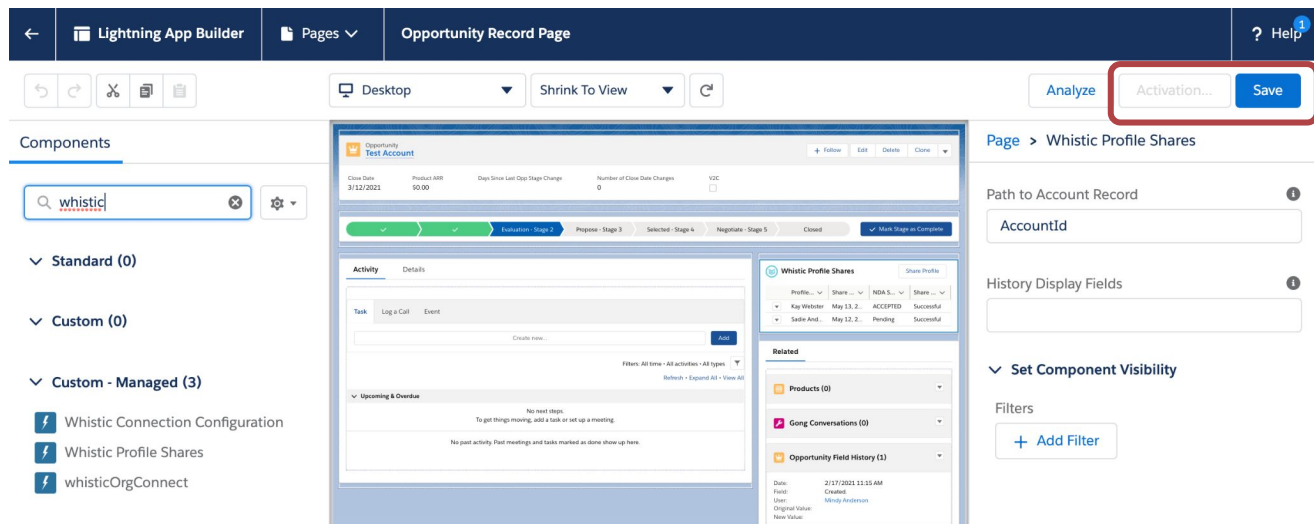
whistic_profile__Lead_Id__r.Name,
whistic_profile__Profile_Share__r.whistic_profile__Share_Date__c,
whistic_profile__Profile_Share__r.whistic_profile__NDA_Status__c

Note the double underscores after the “Whistic_Profile” namespace, rather than a single underscore like you see everywhere else.



Configuration

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!



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

Filters

+ Add Filter