

XTIVIA, Inc.

Vicinity for Salesforce Installation Guide



XTIVIA



Vicinity for Salesforce

Our Mission

XTIVIA, Inc. offers expertise in CRM applications, business process optimization, and Sales Consulting services that allow clients to optimize their relationships with their customers. Our mission is to work with our customers to ensure the success of their CRM implementation.

For more information, please contact us via email, phone, or visit our website

www.xtivia.com info@xtivia.com 888-685-3101, option 2

New York, New Jersey, Texas, Colorado, Missouri



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HOW TO INSTALL VICINITY

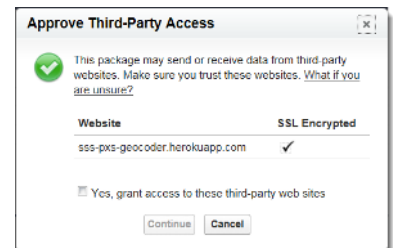
Geolocate and map your existing Salesforce data. Vicinity is a Salesforce1 ready application which provides users a fast, simple, cost effective way to locate nearby Leads, Accounts and Contacts within their Salesforce database.

Only address information is sent to the Vicinity service. Only latitude/longitude values are returned with the address information submitted. All data transmitted between your Salesforce organization and the Vicinity geocoding service is encrypted. No information from your Salesforce organization is stored in the Vicinity geocoding service.

Downloading Vicinity

Vicinity is available in the Salesforce AppExchange.

1. From the AppExchange **search** for Vicinity.
2. Hover over the Vicinity app and click on **More**.
3. Click on **Get It Now** and login to AppExchange. 
4. Here you have a choice to install into production or your sandbox.
5. Confirm and agree to the terms and conditions and click **Confirm and Install!** It will now take you back to the Salesforce log in page.
6. Enter your ID and password and click log in.
7. Click **Continue**.
8. Approve Third-Party Access by clicking the **Yes, grant access to these third-party web site**.



Note

During the installation of the Vicinity package, you are required to approve access to a third party website. This website, listed as sss-pxs-geocoder.herokuapp.com, is the Vicinity geocoding service. This service is used to geocode addresses in your database for Vicinity searches.



9. Click **Continue** and the Package Installer page opens.
10. At the bottom of the page, click **Next**.
11. Select your **Security** settings to **Grant access for all users**.
12. Click **Next** and the package is ready to install.
13. Click **Install**.

Enabling Topics

After installation Vicinity allows users to assign topics to Accounts, Contacts and Leads. Topics are useful for reporting or saving results for viewing later.

To enable topics:

1. Navigate to **Customize > Topics > Topics for Objects**.
2. Check the **Enable Topics** box.
3. Click **Save** for each object you wish to enable. Vicinity uses topics for **Account, Contact, and Lead**.

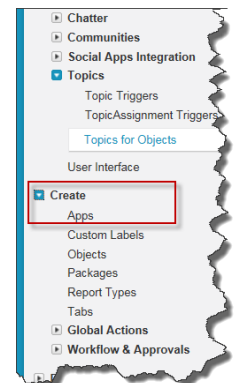


Add Vicinity Tabs to Your Applications and to Mobile

Vicinity comes with its own Salesforce App. However you will likely want to add Vicinity to your existing Sales or Marketing Apps, as well as the Salesforce1 mobile application.

To add the Vicinity tabs to your own applications:

1. In the Setup menu navigate to **Create > Apps**.
2. Click **Edit** next to the App you want to add a Vicinity tab.
3. Select the **Vicinity** and **Points of Interest** tabs in the Available Tabs list.
4. Click the **Add** button. Use the **Up** and **Down** buttons to move the Vicinity tabs to the location you would like them.
5. Click **Save**.



To add the Vicinity tab to your Salesforce1 mobile application:

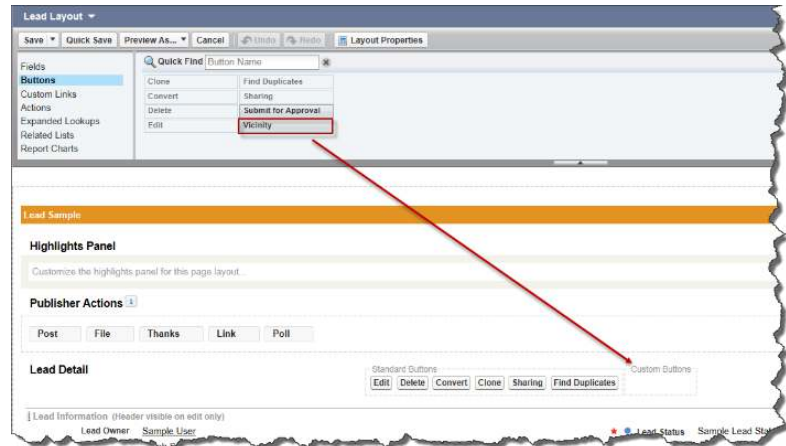
1. In the Setup menu navigate to **Mobile Administration > Mobile Navigation**.
2. Select the **Vicinity Mobile** menu item from the left side and click to add it.

Add Buttons to Page Layouts

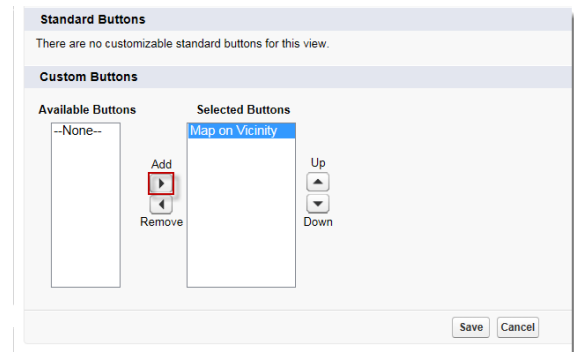
The Vicinity Salesforce package includes six buttons to make Vicinity mapping and searching from your Accounts, Contacts and Leads more convenient.

To add the buttons:

1. In the Setup menu navigate to **Customize > Leads > Page Layouts**.
2. Edit each page layout and add the **Vicinity** button.



3. Next, navigate to **Customize > Leads > Search Layouts**.
4. Edit the **Search Results** by selecting **Map on Vicinity** and adding it to **Selected Button**.
5. Click **Save**.
6. Repeat the previous steps for **Contacts** and **Accounts**.

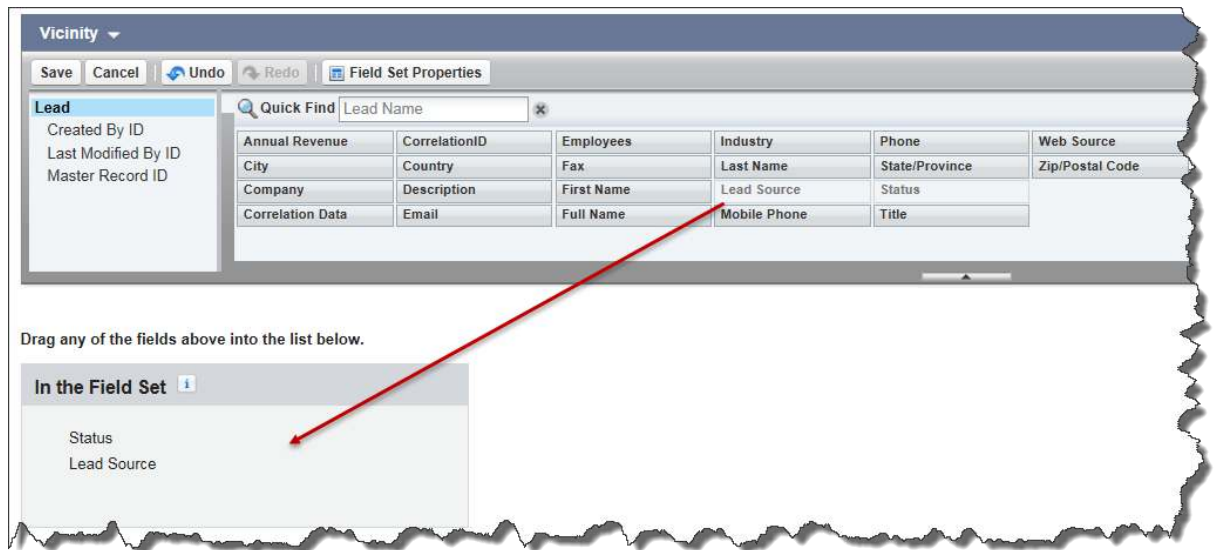


Configure Vicinity Field Sets

Vicinity uses Salesforce Field Sets to control filters and custom fields for your Vicinity searches. You may include up to six fields in each field set for filtering and additional columns.

To configure a Field set:

1. In the **Setup** menu navigate to **Customize > (Leads/Accounts/Contacts) > Field Sets**.
2. Click **Edit** on the **Vicinity** field set.
3. **Drag & Drop** fields from above into the field set to add them.



Note

Please note that Vicinity only supports searching for Text and Pick-list fields that are on the Account, Contact or Lead object itself. Fields from related objects or fields of other data types may not work.

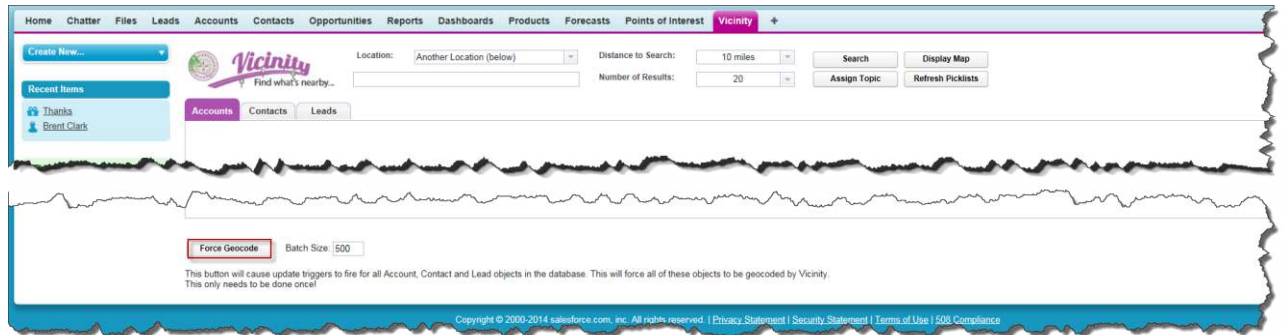
We recommend Status and Lead Source as all other fields are automatically available in Salesforce.



Geocode Addresses for the First Time

After installing Vicinity you will need to force your Account, Contact and Lead addresses to be geocoded. To do this, navigate to the **Vicinity** tab in Salesforce. At the bottom of the page you will see a section only visible to Administrators.

The **Force Geocode** button will trigger an update to run for all Accounts, Contacts and Leads in the system. Click the **Force Geocode** button to start the geocoding process. This initial process can take a long time, however it only needs to run once.

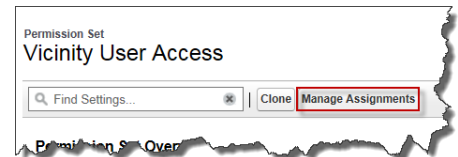


The **Batch Size** value can be decreased if needed. The default value of 500 will be fine for most Salesforce organizations. If you experience errors during this process, try reducing the batch size. Errors can be caused by, other triggers exceeding execution limits.

Configuring Security Profiles

Vicinity uses a Custom Object called **Points of Interest** that allows users to add frequently used locations.

1. Under the Setup menu navigate to **Manage Users > Permission Sets**.
2. Click on **Vicinity User Access**.
3. Select **Manage Assignments**.
4. Select **Add Assignments**.
5. Select users to give the permission set to and click **Assign**.
6. Click **Done**.





Assigning Vicinity Licenses

To grant users access to the Vicinity application you must assign them licenses.

To do this:

1. In the **Setup** menu navigate to **App Setup** and click on **Installed Packages**.
2. Click the **Manage Licenses** link next to the Vicinity package.
3. Click on **Add Users** for anyone that should have access to Vicinity.
We recommend adding all Sales, Marketing and Management staff as they will all have uses for the product.

The Vicinity Installation and Configuration is now complete. You and your users are ready to enjoy the application.