## **C2C Salesforce - integraatio**

Asennusohje 22.3.22

Home   Salesforce				U.	
$\rightarrow$ C $\triangle$	○ A = https://secure.click2contract.com/integrations	1			
	Severa				
	Is Active				
	Client ID:				
	Client SECRET:	Varmista, että olet kiriautuneena			
		Selectorecon in Click?Contraction			
	Get stages	Salesforceen ja Click2Contractiin			
		samalla sähköpostiosoitteella.			
	Salestorce	Integraatio tunnistaa			
	Is Active      Inload Contracts	Click2Contract-tilin			
		sähkönostiosoitteen perusteella			
	Salesforce authentication Install Salesforce Visual Force Component	santopostiosofficeri perusteena.			
	Get stages				
	Netview	Aloita Click2Contractin			
		Integrations valikosta			
	Auto send to Netvisor when proposal accepted				
	Business ID: xxxxxx-x	Valitse Salesforce authentication			
	Customer ID: ND_xxxxxx_xxxx				
	Private key: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx				
	Upload confirmed PDF's to Google Drive				_
	Is Active				2
ps://login.salesforce.com/ser	rvices/oauth2/authorize2response_type=code&client_id=3MVG9t0sl2P.pBypBFmOn5l5nFdRfi5DYt6VIIkh	KPFzuINXhRHIzhf39SNWIFkveRW4Oztv/Fuv_6IIJ8vJuf&redirect_uri=https://secure.click2contract.com/integ	aration/salesforce/oauth2cal	llback	
2 Q Type here to	o search O H = O M & O	) ol V	記 (1)) 智つ ENG	14.18	ĩ

Home   Salesforce ×	Allow Access?   Salesforce × +	- 0 ×
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$	🔿 👌 https://click2contract2022.my. <b>salesforce.com</b> /setup/secur/RemoteAccessAuthorizationPage.apexp?source=CAAAAX9QJXHCMDAwMDAwMDAwMDAwMDAwMDA	⊚ 👱 ≡
	· · · · · · · · · · · · · · · · · · ·	



🔴 3°C Aurinkoista \land 🔩 🕼 🕬 🖬 ENG 03/03/2022

₹4

0

Home   Salesforce	× Click2Contract × +	- 0 ×
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$	○ A = https://secure.click2contract.com/integrations	⊚ 👱 ≡
	Upload Contracts	
	Hubspot authentication Get stages	
	Severa	
	Is Active	
	Client ID:	
	Client SECRET:	
	Get stages	
	Salesforce	
	<ul> <li>Is Active</li> <li>Upload Contracts</li> <li>Lataa Visual Force komponentti</li> </ul>	
	Salesforce authentication       Install Salesforce Visual Force Component         Get stages	
	Netvisor	
	Is Active	
	Auto send to Netvisor when proposal accepted	
	Business ID: xxxxxx-x	
	Customer ID: ND_xxxxxx_xxxxx	
	Private key: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	
https://login.salesforce.com/packagin	g/installPackage.apexp?p0=04t7Q000000cXic to Coogle Drive	
Type here to sear	ch 🛛 🗧 🧰 🍪 👧 🤀 🧏 🥒 🥚 3°C Aurinkoista 🔨 🤹 🖾	⊈୬) ≌⊡ ENG 14.19 03/03/2022 🛃



0



🔴 3°C Aurinkoista 🔨 🐢 🕼 🕬 阳 ENG 14.20 03/03/2022



Home   Salesforce × ac C	lick2Contract	× 🕨 Installed Packa	ages   Salesforce × +							- 0 ×
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$	08=	https://click2contract2022.lightni	ng.force.com/lightning/setup/Imp	ortedPackage/page?	address=%2F0A3%3f	setupid%3DImport	edPackage	%26app	Layo 🏠	⊚ ⊻ ≡
-		Q lightni	ng app						*•	🗄 🏽 ? 🌣 🖡 🐻
Setup Home Object M	anager 🗸	Q "lightn	ing app" in Setup	_						
PLATFORM TOOLS	SE Ir	TUP Lightni User Int Installed Packa	ng App Builder erface	A	Siirry Sale	sforcess eriin	a Lig	htn	ing	
App Manager	Installe	ed Packages								Help for this Page 🥝
> Connected Apps	On AppExcha	ange you can browse, test drive, download,	and install pre-built apps and componen	ts right into your salesfor	ce.com environment. Lea	n More about Installing	Packages.			
> Lightning Bolt	Apps and cor	nponents are installed in packages. Any cu	stom apps, tabs, and custom objects are	initially marked as "In De	velopment" and are not d	eployed to your users.	This allows yo	u to test a	and custom	nize salesforce appexchange
> Mobile Apps	Depending of	ying. You can deploy the components indivi	u can take different actions from this page	er as a group by clicking L	Jepioy.					
✓ Packaging	To remove a	package, click Uninstall. To manage your	package licenses, click Manage License	95.						Visit AppExchange »
Installed Packages	Installed I	Packages								
Package Manager	Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects AppExchange Ready
Package Usage	Uninstall	GS_Sales_Reports_Dashboards	Salesforce Success Programs	1.0		15.2.2022 12.45	~	0	0	0 Not Applicable
> Feature Settings	Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		15.2.2022 12.45	~	0	0	0 Not Applicable
> Einstein		Description Salesforce.com CRM Dashboards								
> Objects and Fields	Uninstall	Click2Contract	Click2Contract Oy	1.1		3.3.2022 14.20	✓	0	0	0 Not Applicable
> Events	Uninstalle	ed Packages								
> Process Automation	No uninsta	lled package data archives								
> User Interface										
> Custom Code										
> Development										
> Environments										
javascript:void(0); ment										
Type here to search		o ei 🧮	2 🕹 🔕 😔 🧕	- 2		🥚 3°C /	Aurinkoista	^	<b>a</b> 🕄	ばり) 配 ENG 14.22 03/03/2022

Home   Salesforce × 🚾 Cli	ick2Contract	× 💽 Lightning App	Builder   Salesfor × +						- 0 ×
$\leftrightarrow$ $\rightarrow$ C $\textcircled{a}$	○ A = http:	s://click2contract2022.lightnii	ng.force.com/lightning/se	etup/FlexiPageList/home?0.source=al	loha		☆		⊚ ⊻ ≡
<b>*</b>		Q lightnir	ng app				*	8	? 🌣 🜲 🐻
Setup Home Object Ma	inager 🗸								
PLATFORM TOOLS  Apps App Manager AppExchange Marketplace	SETUP Light	ning App Builder	graphical interface for creating	ng custom Lightning pages for Salesforce	e Lightning Experier	nce and mobile a	pp. Lightning pages are built us	sing Lightning	components-compact,
> Connected Apps	configurable, and re	usable elements that you can dr	ag and drop into regions of	the page in the Lightning App Builder.					
> Lightning Bolt	View: All 🗸	<u>Create New View</u>				E E C HIIII		THIVIYIY	√ Z Å Ä Ö Other All
> Mobile Apps					ADCDL	_			
✓ Packaging		label *	Name	Namesnace Profix	Description	Type	Created By	Last Mod	lified By
Installed Packages	Edit   Clone   Del	Account Record Page	Account Record Page1	1	Description	Record Page	IRant 15 2 2022 12 45	JRant 15	5 2 2022 12 45
Padraga Managar	Edit   Clone   Del	Account Record Page	Account Record Page?	· 2		Record Page	JRant 15.2.2022 12.45	JRant 15	5 2 2022 12 45
Package Manager	Edit   Clone   Del	Account Record Page	Account Record Page			Record Page	JRant. 15.2.2022 12.45	JRant. 15	5.2.2022 12.45
Package Usage	Edit   Clone   Del	Contact Record Page	Contact Record Page1			Record Page	JRant, 15.2.2022 12.45	JRant, 15	5.2.2022 12.45
> Feature Settings	Edit   Clone   Del	Contact Record Page	Contact Record Page			Record Page	JRant, 15.2.2022 12.45	JRant, 15	5.2.2022 12.45
) Finatoin	Edit   Clone   Del	Getting Started Home	Getting Started Home			Home Page	JRant, 15.2.2022 12.45	JRant, 15	5.2.2022 12.45
> Einstein	Edit   Clone   Del	Lead Record Page	Lead Record Page1			Record Page	JRant, 15.2.2022 12.45	JRant, 15	5.2.2022 12.45
> Objects and Fields	Edit   Clone   Del	Lead Ref Edit Basard 10 On	nortunity Record Dags je			Record Page	JRant. 15.2.2022 12.45	JRant, 15	5.2.2022 12.45
> Events	Edit   Clone   Del	Opportunity Record Page	Opportunity_Record_Page	<sup>age1</sup> Siirry ec	litoimaa	n Oppo	rtunity 022 12.45	JRant, 17	7.2.2022 14.11
> Process Automation	Edit   Clone   Del	Opportunity Record Page	Opportunity_Record_Pa	age Record	Pagea	Record Page	JRant, 15.2.2022 12.45	<u>JRant</u> , 3.(	3.2022 14.15
✓ User Interface				I CCOIU	i ayea				
Action Link Templates									
Actions & Recommendations									
App Menu									
javascript:void(0) Labels									
Type here to search		O 🗄 🔚 🤇	) 🔬 😉 🖸	🤁 🥶 🛃		<mark>)</mark> 3°C	Aurinkoista 🔨 🔩 🕄	() <b>1</b>	ENG 14.23 03/03/2022

Home   Salesforce X Click2Cor	tract × Opportunity Record Page - Ligh × +	- 0 :
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$ O (	त्र न्थ https://click2contract2022.lightning.force.com/visualEditor/appBuilder.app?id=0M07Q0000035NjBSAU&retUrl=%2fone%2fone.app%23%2fsetup%2fp 🖒	S 7
← 📅 Lightning App Builder 🌓 Pages ৲	Opportunity Record Page	? Не
	The Desktop The Shrink To View The Contract of the Analyze 🛕 🖌	Activation Save
Components	Opportunity Uusi dilli Delete Clone V	
Q Search 🕸 🗸	Account Name Close Date Amount Opportunity Owner Salesforce.com (Sample) 6.3.2022 €600.00 D Jaakto Ranta & Opportunity Record Page	a
Related List Quick Links	Proposal Negotiation Closed ✓ Mark Stage as Complete     * Developer Name	<u> </u>
Related Lists Related Record	Activity Chatter Details Related List Quick Links O Opportunity_Record_Pag	e
Peptite Report	Log a Call New Task New Event Email *Page Type  *Page Type  Record Page	
Salesforce Anywhere Messages	Recap your call     Add     If lifes (0)     If cash objectit (0)       Filters: All time + All activities + All types     Image: Cash objectit (0)     Image: Cash objectit (0)	
Tabs # Topics	V Upcoming & Overdue  No next stans View All Vie	
Trending Topics	To get things moving, add a task or set up a meeting.  No past activity. Past meetings and tasks marked as done show up here.  No past activity. Past meetings and tasks marked as done show up here.  Template Header, Subheader, Righ	t Sid Change
✓ Custom (0)	Valitse alue, jolla C2C	
No components available.	Visualforce kuvake alueelle	
✓ Custom - Managed (0)	Contact Roles (1)	
No components available. 🗸 🗸	Marc Benioff (Sample)     Role:     The Executive Officer	
Get more on the AppExchange	View All O' Tips 2	_ ×

Home   Salesforc
------------------

Click2Contract

×

X

Opportunity Record Page - Ligh × +

• @ ×



Home	Salesforce
	Darobiored



C

secure.click2contract.com/integrations

Get deals from: TARJOUS

Move confirmed deals to: TILAUS dont move

Click2ContractOy\_NeGR7tjlWUekbXLgD6.apps.vismasevera.com

4c5155bc-6c55-31f7-ca93-51fc98d1a517

Colosfarras	
Salestorce	000 m late metions will be dell'in a literality
Is Active	C2C:n Integrations vallendella volt valita
Move sent deals to: PROPOSAL/PRICE QUOTE dont move	1) Vaihdetaanko Salesforcessa stageia
Move opened deals to: PROSPECTING dont move	tariouksen etenemisen mukaan
Move confirmed deals to: QUALIFICATION dont move	0) Ladata en la jaka internet like tattu
Upload Proposals to Opportunity	2) Ladataanko jokainen lähetetty
Upload Contracts to Opportunity	tarjousversio Opportunitylle
Upload Contracts to Account	3) Ladataanko asiakkaan allekirioittama
	sonimus Opportunitylle tai Accountille
Salesforce authentication Install Salesforce Visual Force Compone	Lisäksi voidaan määrittää Custom fieldien ja
Get stages	Custom obiektien tuomista tariouksille ia
Natricar	sonimuksille
S Active	
Auto send to Netvisor when proposal accepted	
2805139-5	
CD 1/6850 80522	
O 🛱 🚍 💽 🧖	ala 👌 🚷 🛛 🕘 2°C Aurinkoista \land 🔩 🕼