

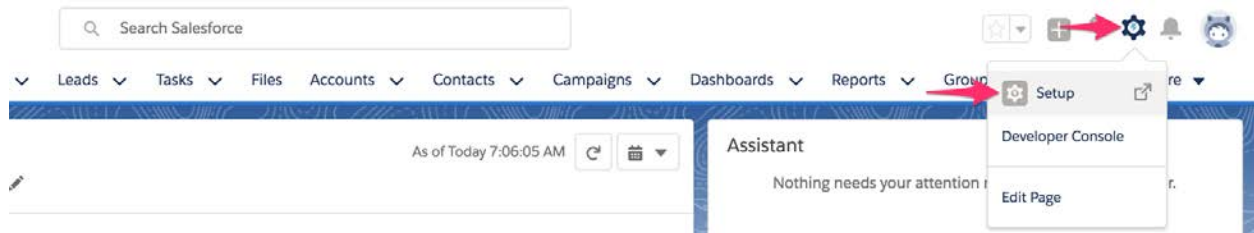
Validity Verify Installation and Configuration Guide

Introduction

This document serves as an installation and configuration guide for the Validity BriteVerify app. The first section covers the installation of the Validity BriteVerify package. The following sections will walk you through completing the Setup Assistant, applying permission sets, and adding the Validity BriteVerify component to page layouts. This document is meant to guide you through configuring your org in a Lightning Experience environment. If using the Salesforce Classic interface, you can switch to Lightning by clicking **Switch to Lightning Experience** at the top of the page.



In the following sections, the highlighted navigation steps begin from Setup which can be accessed by clicking the gear icon to the upper right and selecting **Setup**. Once in Setup, you may use the **Quick Find** box in the left column of the home tab to find and navigate to the appropriate section or access the Object Manager tab.

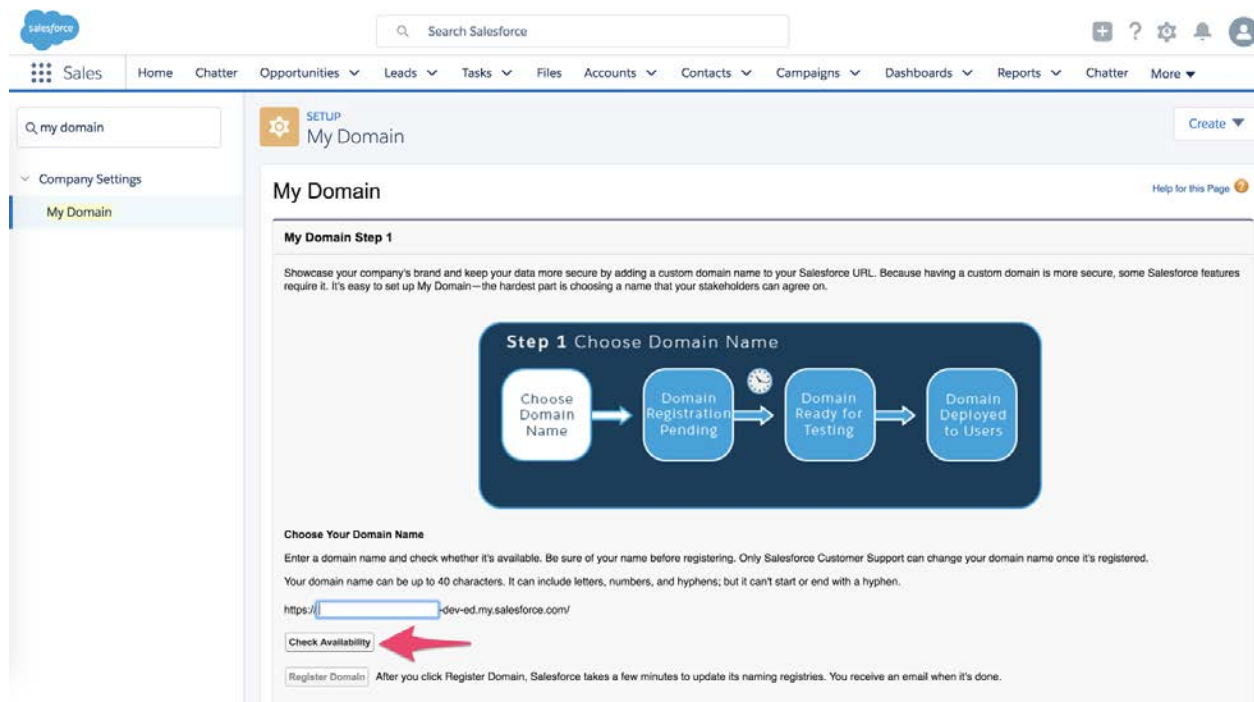


--Installing the Package--

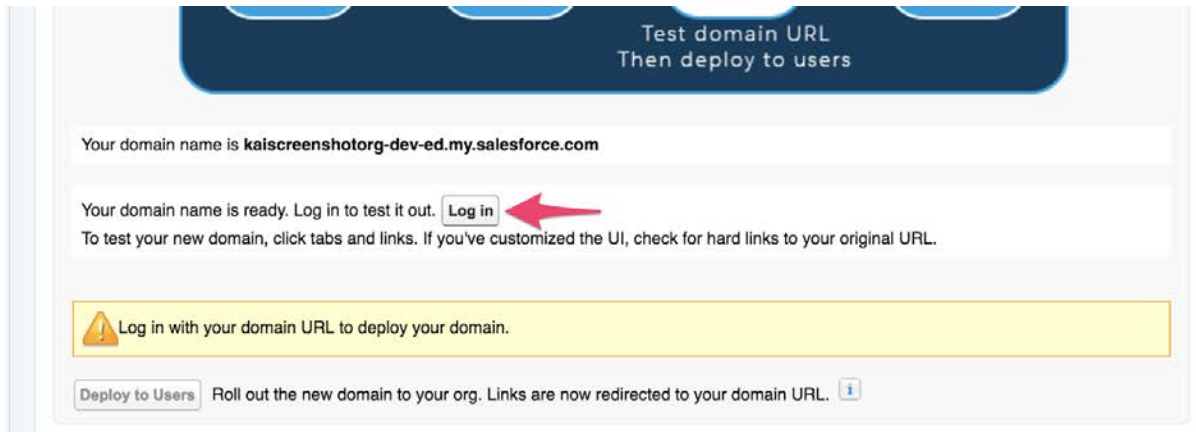
Domain Setup

A custom domain is required for Salesforce Lightning. If your org does not already have a domain enabled, navigate to **Setup > Company Settings > My Domain**

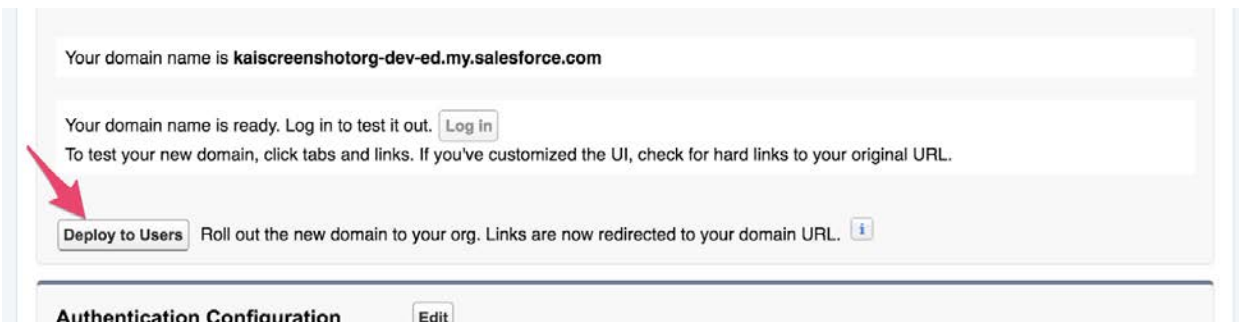
- Check for the availability of a domain and register it



- After the domain has been registered, refresh the page. You will need to log into the new domain for the org in order to continue the process—click on the **Log in** button and re enter your credentials.



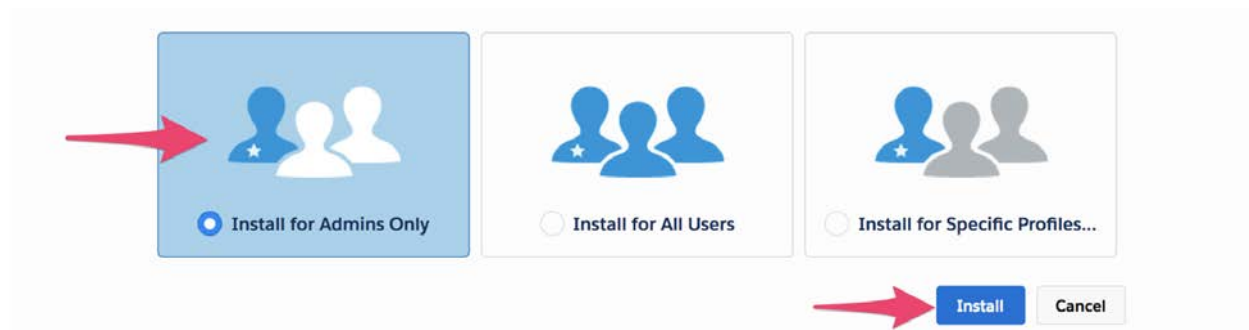
- After logging in, click **Deploy to Users**



Installation

Copy and paste the package install URL into your browser's address bar. If you are not already logged into the org you wish to install the package into, salesforce will prompt you to log in. Once logged in...

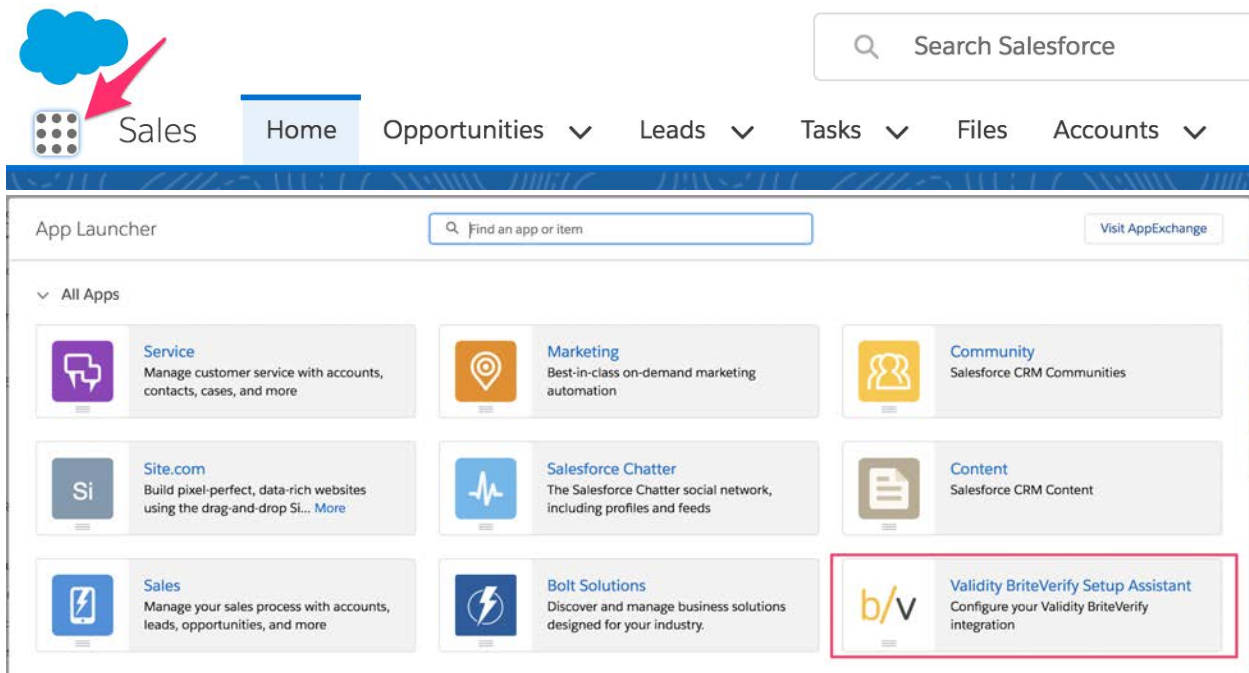
- **Install for Admins Only** is recommended—this option allows for controlling access and permissions after the package has been installed
For further information, [please click here to refer salesforce documentation on Package Installations](#).



--Setup and Configuration--

Validity Verify Setup App (Setup Assistant)

The Validity BriteVerify Setup Assistant will need to be completed to connect your Salesforce org to your Validity BriteVerify account in order to verify an email address. Navigate to **App Launcher > Validity BriteVerify Setup Assistant**



- Click **Get Started**



Complete the sections below to set up the Validity BriteVerify app.



System Connections

Establish an outbound connection between your Validity BriteVerify account and Salesforce



Permission Sets

Assign app specific settings to use the Validity BriteVerify component



Lightning Component

A general overview about the Validity BriteVerify component

- Enter your API Key then click **Next**

Connect to Validity BriteVerify

Authorize Salesforce to send data to your company's Validity BriteVerify account

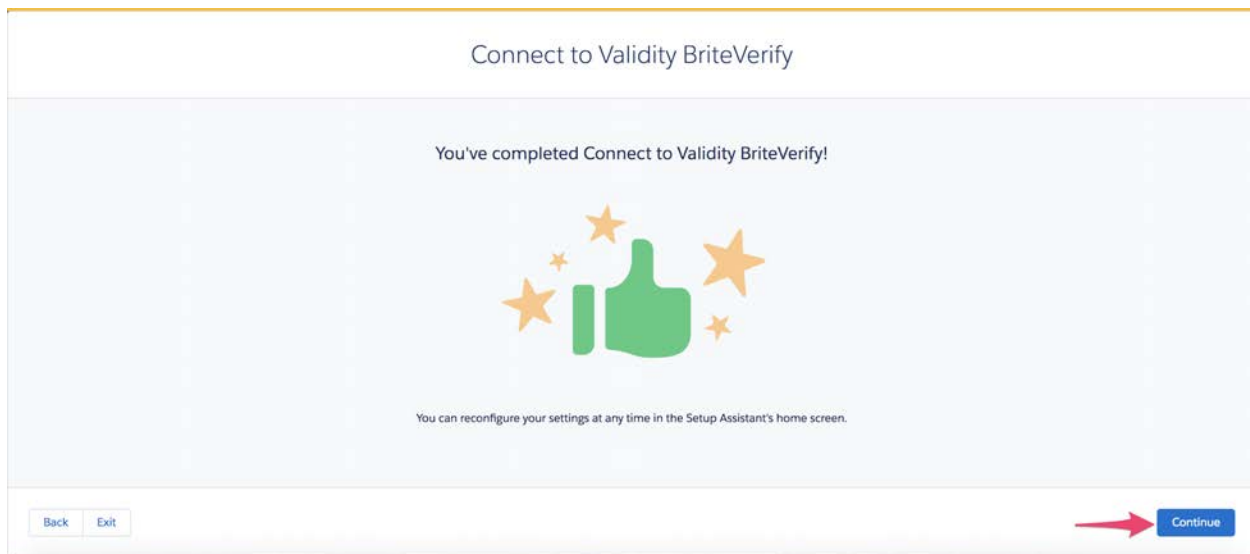
i The API Key or Application Programming Interface is unique to your organization. Please sign into your Validity BriteVerify account to obtain your API Key at https://app.briteverify.com/users/sign_in

* Api Key
Input your key

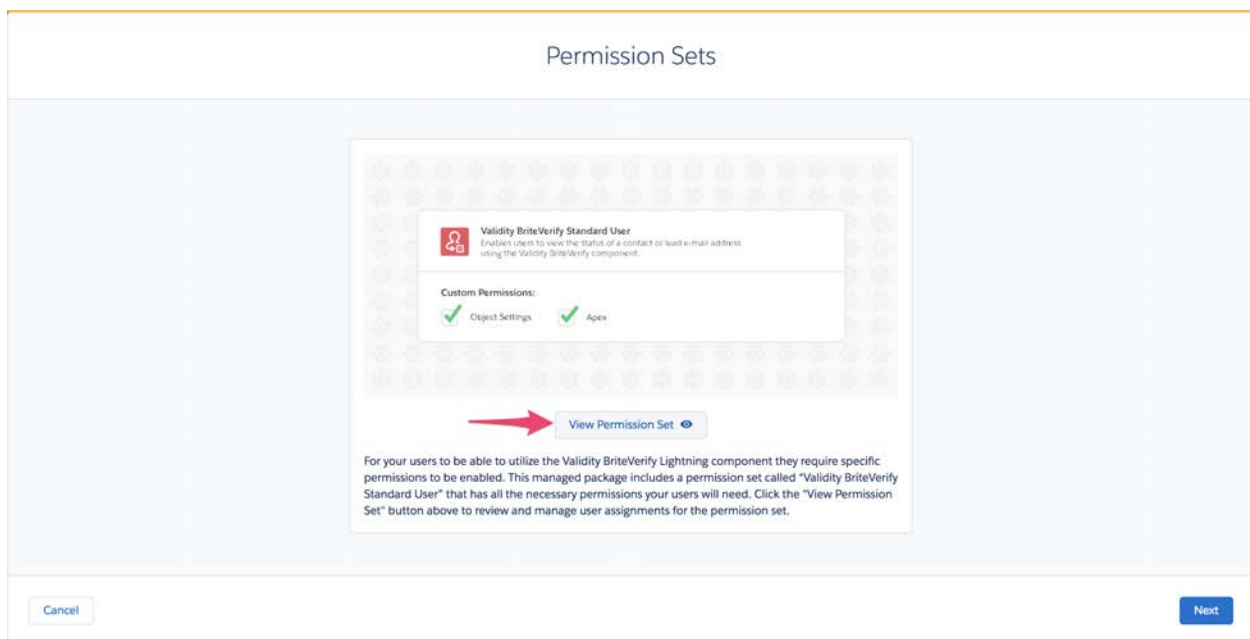
Cancel

Next

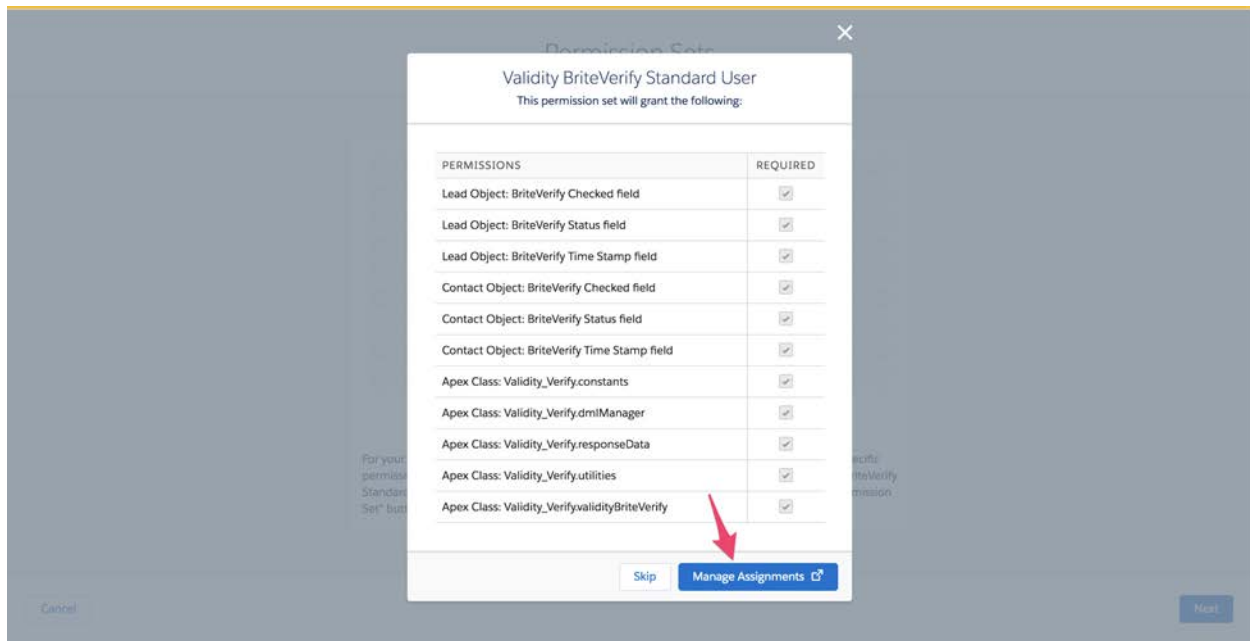
- Click **Continue**



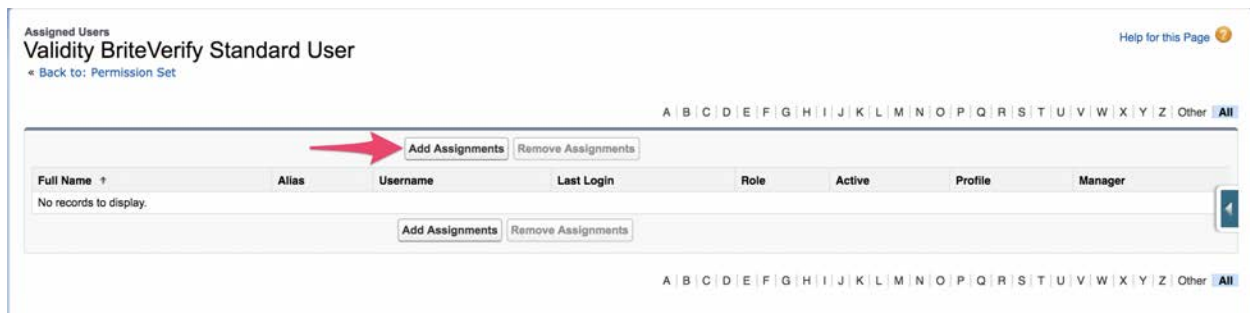
- Click **View Permission Set** to assign the Validity Verify Standard User Permission Set



- Click **Manage Assignments** this will open a new tab



- Click **Add Assignments**



- (1) Check the box next to the user(s) and then (2) click **Assign**

Assign Users Help for this Page

All

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**

2 → Assign Cancel

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00d1d0000000o7wuaa.tdexedj1m97u@chatter.salesforce.com			✓	Chatter Free User	
<input checked="" type="checkbox"/> Edit	User_Integration	integ	integration@00d1d0000000o7wuaa.com			✓	Analytics Cloud Integration User	
<input checked="" type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d1d0000000o7wuaa.com			✓	Analytics Cloud Security User	
<input checked="" type="checkbox"/> Edit	User_User	UUser	test-fb5xgvau8n9n@example.com	9/14/2018 2:08 PM		✓	System Administrator	

1 → Assign Cancel

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**

- Return to the SetUp Assistant page and click **Next**

Permission Sets

Validity BriteVerify Standard User
Enables users to view the status of a contract or lead e-mail address using the Validity BriteVerify component.

Custom Permissions:

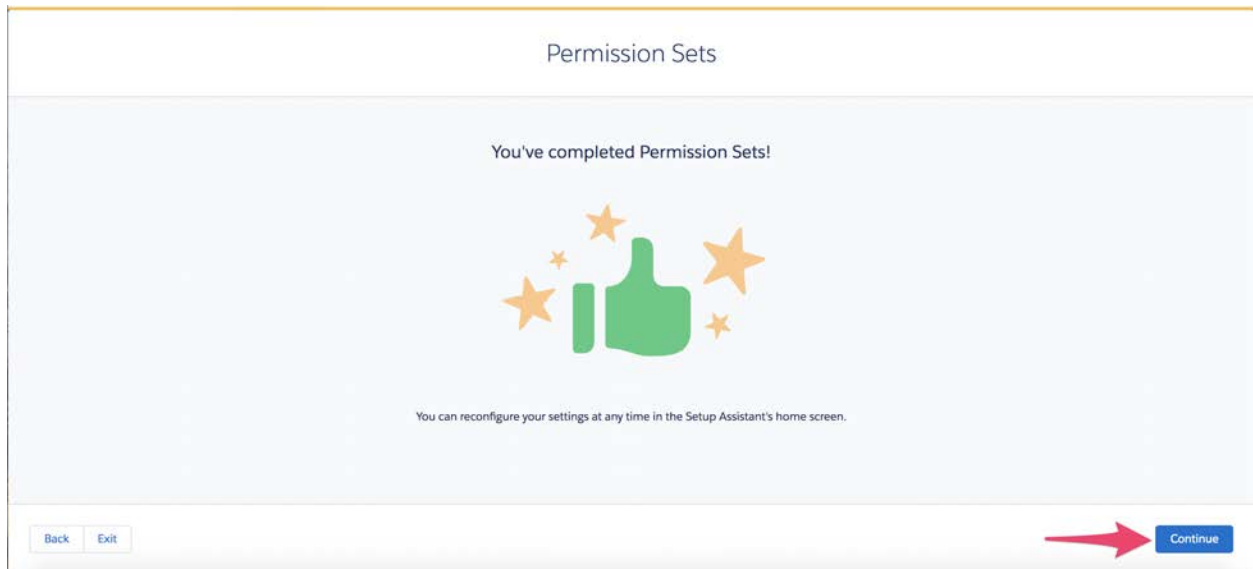
- ✓ Object Settings
- ✓ Apex

[View Permission Set](#)

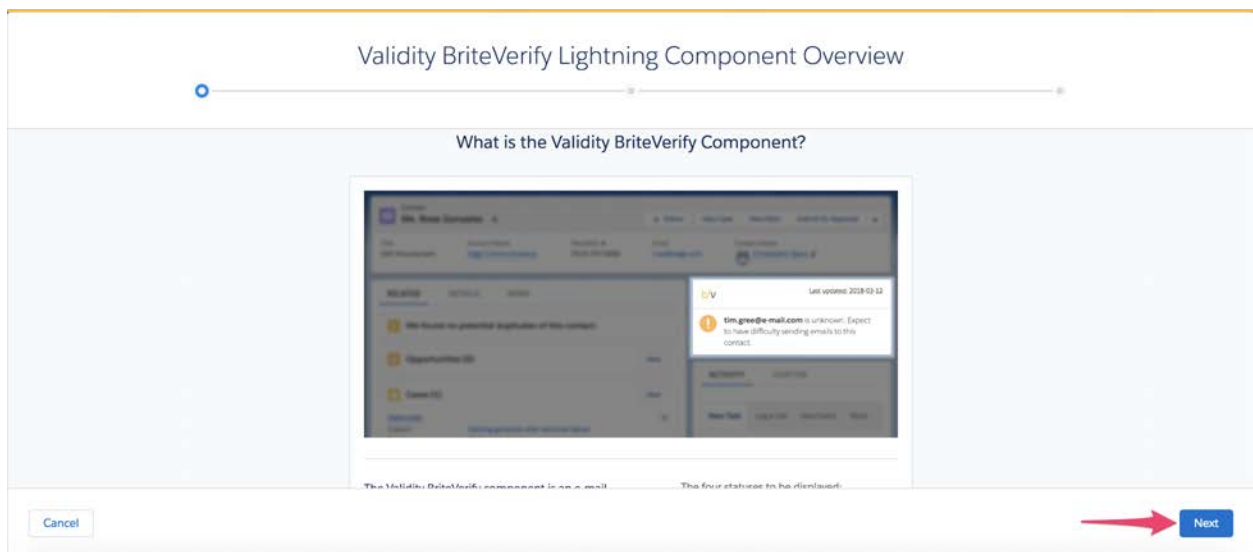
For your users to be able to utilize the Validity BriteVerify Lightning component they require specific permissions to be enabled. This managed package includes a permission set called "Validity BriteVerify Standard User" that has all the necessary permissions your users will need. Click the "View Permission Set" button above to review and manage user assignments for the permission set.

Cancel Next

- Click **Continue**



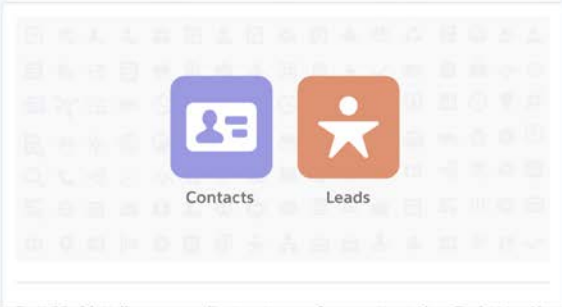
- Click **Next**



- Click **Next**

Validity BriteVerify Lightning Component Overview

Where does the Validity BriteVerify Component work?



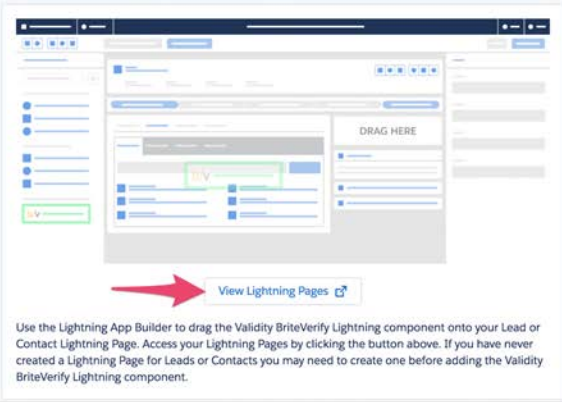
Back Exit

Next

- Click **View Lightning Pages**. This will take you to the Lightning App Builder in a new tab where you can add the **Validity BriteVerify component** to a Contact or Lead lightning record page

Lightning Component

How to Add the BriteVerify Lightning Component to Your Page



View Lightning Pages

Use the Lightning App Builder to drag the Validity BriteVerify Lightning component onto your Lead or Contact Lightning Page. Access your Lightning Pages by clicking the button above. If you have never created a Lightning Page for Leads or Contacts you may need to create one before adding the Validity BriteVerify Lightning component.

Back Exit

Next

- Click **Edit** to add the component to an existing lightning page layout.

The screenshot shows the Lightning App Builder interface. On the left is a navigation menu with sections like 'ADMINISTRATION', 'PLATFORM TOOLS', and 'User Interface'. The main area is titled 'Lightning App Builder' and contains a table of 'Lightning Pages'. A red arrow points to the 'Edit' link for the 'Contact Record Page'.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Edit Clone Del	Contact Record Page	Contact_Record_Page			Record Page	Tom, 8/23/2018 8:52 AM	Tom, 8/30/2018 2:40 PM
Edit Clone Del	Lead Record Page	Lead_Record_Page			Record Page	Tom, 8/27/2018 8:27 AM	Tom, 8/27/2018 9:32 AM

- Once in the Lightning App Builder, from the list of components on the left, find the **Validity BriteVerify** component under the “Custom - Managed” section and drag and drop it onto the page layout

The screenshot shows the Lightning App Builder interface with a 'Contact Record Page' layout. On the left, the 'Lightning Components' panel shows the 'Custom - Managed' section with the 'Verify Email' component highlighted. A red arrow indicates the component being dragged to the 'ACTIVITY' section of the page layout.

Page

*Label
Contact Record Page

*Developer Name
Contact_Record_Page

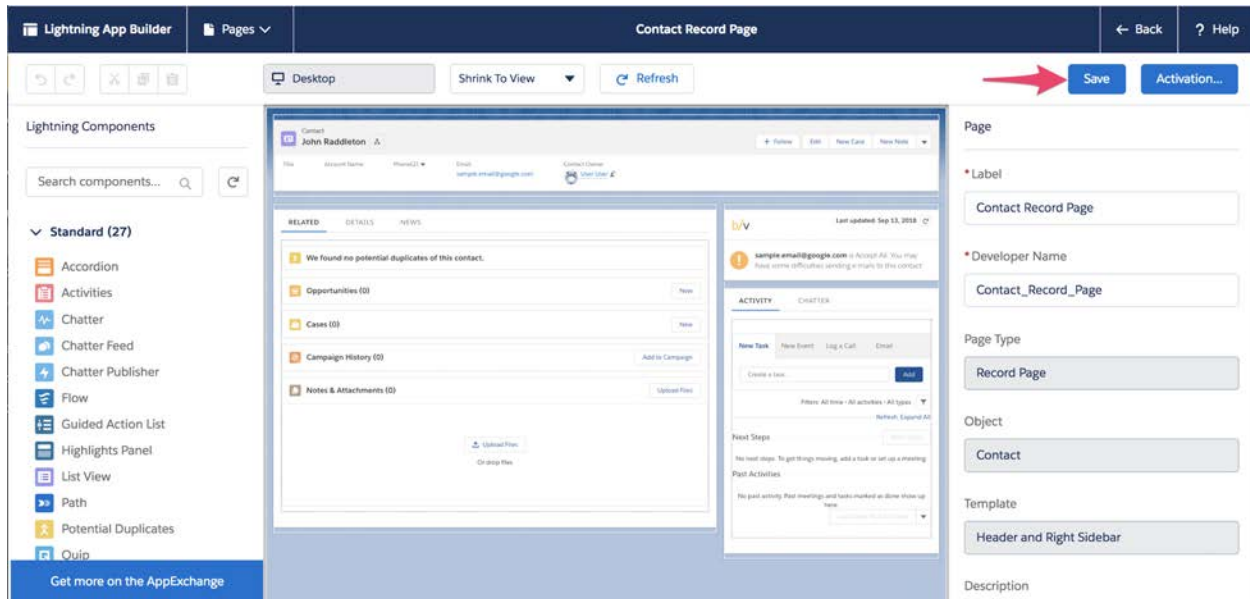
Page Type
Record Page

Object
Contact

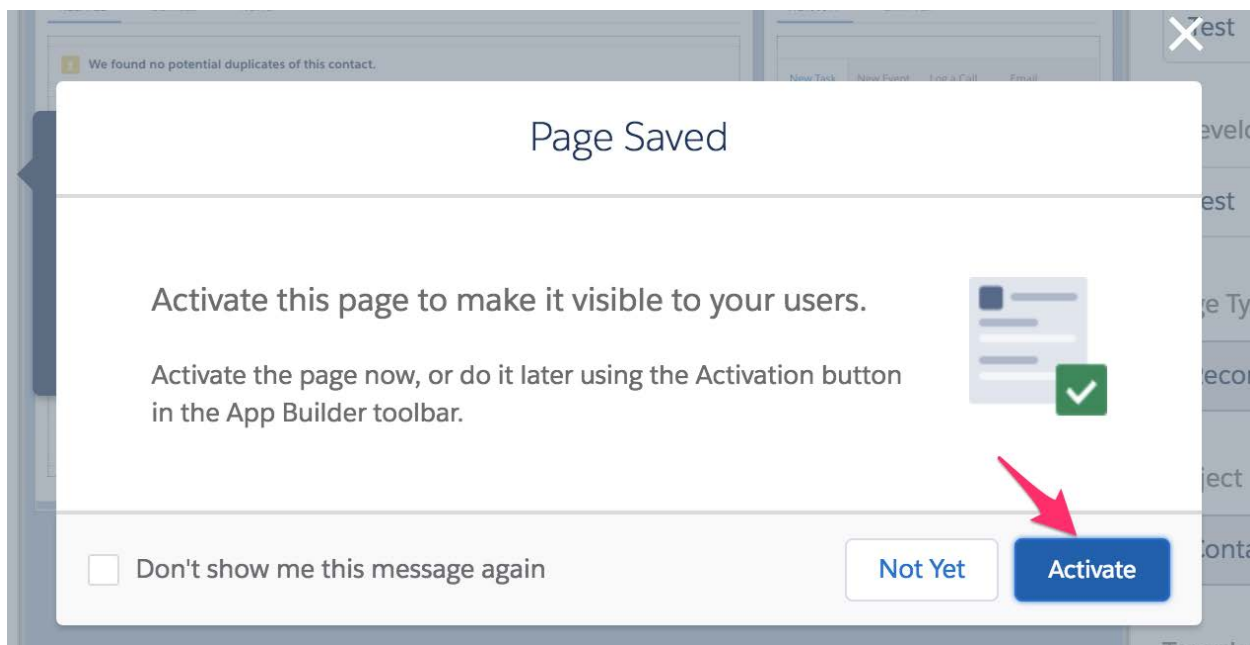
Template
Header and Right Sidebar

Description

- Click **Save**



- Click **Activate** from the Page Saved modal or click **Activation...** from the Lightning App Builder if activation is required



Lightning App Builder Pages Contact Record Page Back ? Help

Desktop Shrink To View Refresh Save Activation...

Lightning Components

Search components... Standard (27)

- Accordion
- Activities
- Chatter
- Chatter Feed
- Chatter Publisher
- Flow
- Guided Action List
- Highlights Panel
- List View
- Path
- Potential Duplicates
- Quip

Get more on the AppExchange

Contact Record Page

Page

* Label

Contact Record Page

* Developer Name

Contact_Record_Page

Page Type

Record Page

Object

Contact

Template

Header and Right Sidebar

Description

- Activate the case record page as an org default, app default, or a combination of app, record type, and profile

Activation: Contact Record Page

Custom record pages can be assigned at different levels:

- The org default** record page displays for an object unless more specific assignments are made.
- App default** page assignment, if specified, overrides the org default.
- App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

ORG DEFAULT **APP DEFAULT** **APP, RECORD TYPE, AND PROFILE**

This page is set as the org default.

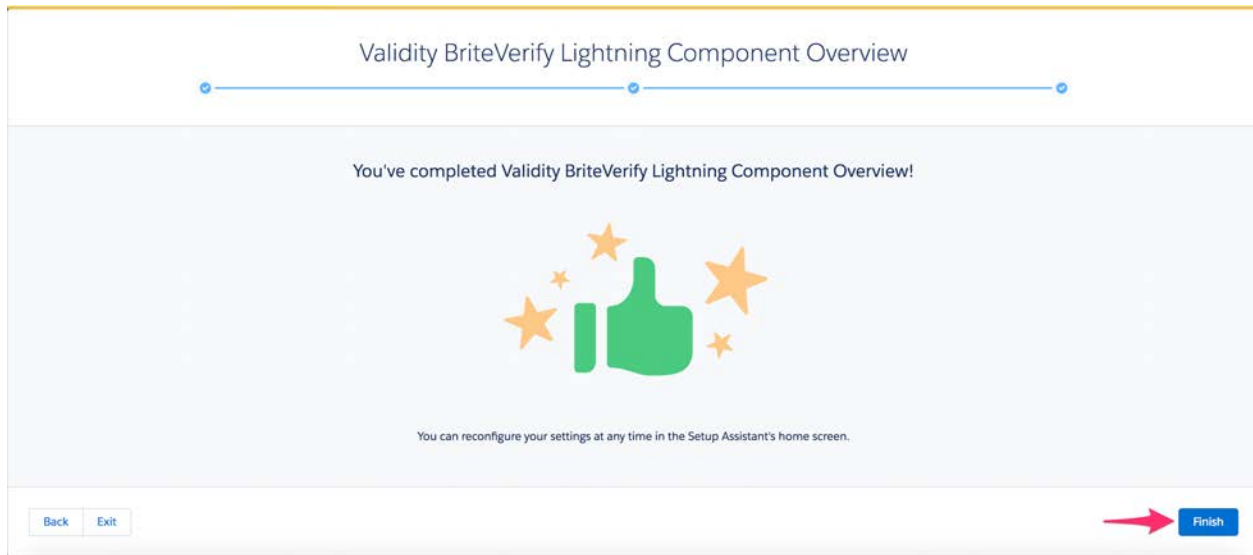
If you remove this page as the default, apps that don't have a custom record page assigned display the Salesforce system default record page.

i In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default. [Check your assignments.](#)

[Remove as Org Default](#)

[Close](#)

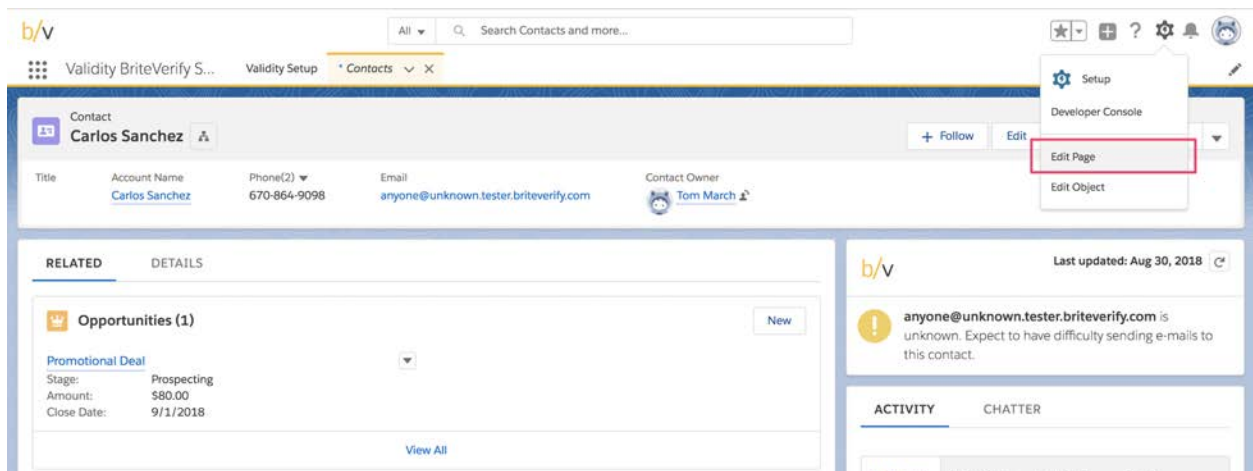
- Return to the Setup Assistant by clicking **Finish**



Validity BriteVerify Component

The Validity BriteVerify component will be available for the Contact and Lead objects. To add the **Validity BriteVerify component** to a lightning record page go into the Contact and Lead Record Page.

Note: You may also click **Edit Page** from a contact record page to get to the Lightning App Builder



Permission Sets

Two permission sets are included with the Validity BriteVerify package. The **Validity BriteVerify Standard User** and the **Validity BriteVerify Setup User**.

The Validity BriteVerify Standard User permission set will need to be assigned to any user that will be interacting with the Validity BriteVerify component. The Validity BriteVerify Setup User permission set can be assigned to the user that will be completing the Setup Assistant. The Validity BriteVerify Setup User permission set is provided as part of the package for cases where a non system admin user would be in charge of the implementation of the Validity BriteVerify component or as a reference for what permissions are required to access the Setup Assistant.

Assign Permission Set

In a case where the admin does not assign the Validity BriteVerify Standard User permission set during Setup Assistant, navigate to **Setup > User > Permission Sets** then select the permission set you would like to assign.

- Select the Permission Set you would like to apply

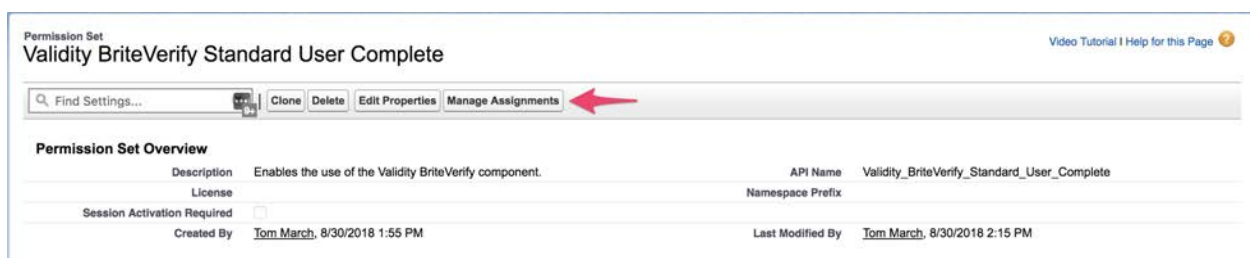
New



A B C D E F G H I J K L M N

<input type="checkbox"/>	Action	Permission Set Label ↑	Description
<input type="checkbox"/>	Del Clone	Case Feed	
<input type="checkbox"/>	Clone	Validity BriteVerify Setup User	Assigned user(s) have the ability to use the Validity B...
<input type="checkbox"/>	Clone	Validity BriteVerify Standard User	Enables the use of the Validity BriteVerify component.

- From the Permission Set Overview page, click **Manage Assignments**



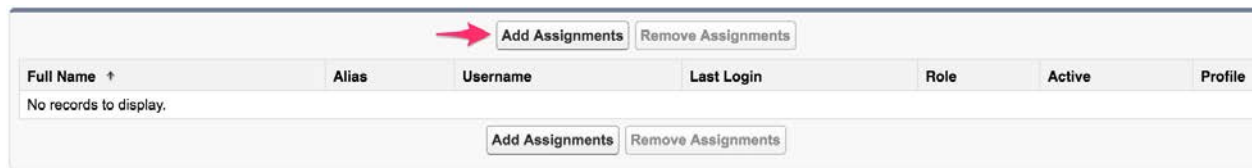
Permission Set
Validity BriteVerify Standard User Complete

[Find Settings...](#) [Clone](#) [Delete](#) [Edit Properties](#) [Manage Assignments](#)

Permission Set Overview

Description	Enables the use of the Validity BriteVerify component.	API Name	Validity_BriteVerify_Standard_User_Complete
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>		
Created By	Tom March, 8/30/2018 1:55 PM	Last Modified By	Tom March, 8/30/2018 2:15 PM

- Click **Add Assignments**



Add Assignments Remove Assignments

Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
No records to display.						

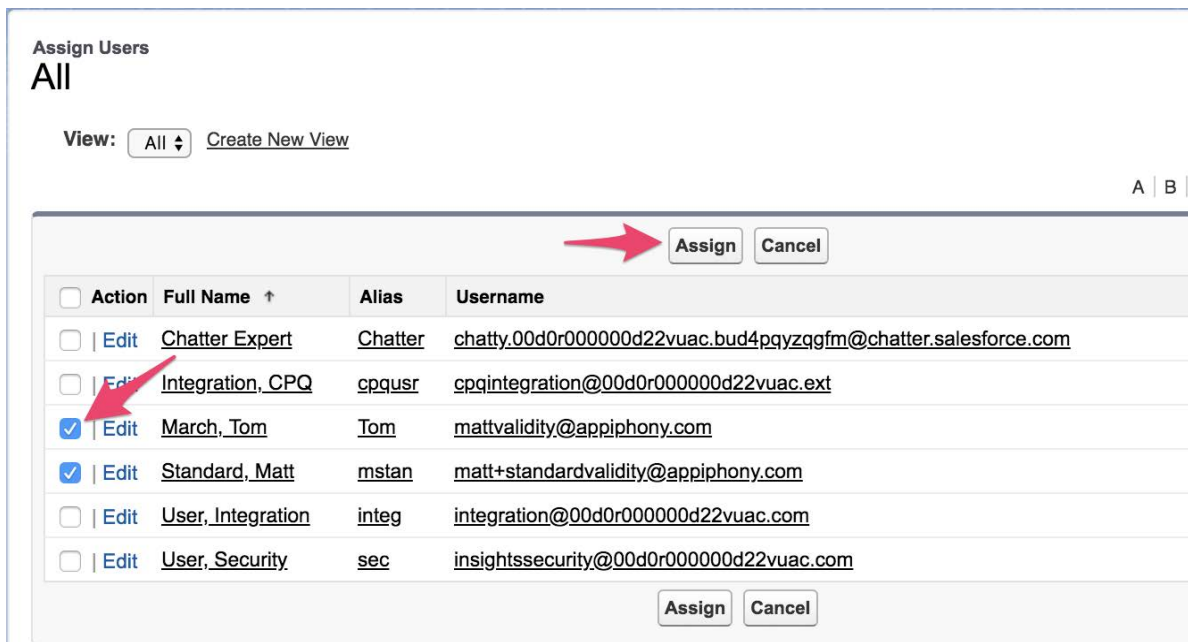
Add Assignments Remove Assignments

- Check the box next to the user(s) that you would like to assign the permission set to and click **Assign**

Assign Users
All

View: All ▾ [Create New View](#)

A | B |



Assign Cancel

<input type="checkbox"/> Action	Full Name ↑	Alias	Username
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d0r000000d22vuac.bud4pqyzqgfm@chatter.salesforce.com
<input type="checkbox"/> Edit	Integration, CPQ	cpqusr	cpqintegration@00d0r000000d22vuac.ext
<input checked="" type="checkbox"/> Edit	March, Tom	Tom	mattvalidity@appiphony.com
<input checked="" type="checkbox"/> Edit	Standard, Matt	mstan	matt+standardvalidity@appiphony.com
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d0r000000d22vuac.com
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d0r000000d22vuac.com

Assign Cancel