PartnerTap Managed Package Installation Guide

*Salesforce Managed Package is a **paid feature** at PartnerTap. When your company has purchased this, you will receive a link to install the package.*

Adding PartnerTap Mapped Partners to your Account Layouts

Lighting Installation Instructions

1. Install the PartnerTap Salesforce Managed Package from the Salesforce AppExchange. Or by using the Install URL provided by Customer Success.
2. Click Setup in the gear icon near your profile picture
3. Click Object Manager near the 9 dot button on the left
4. Choose “Account” in the object list
5. Choose “Page Layouts” in the menu on the left
6. Pick the Account layout you wish to edit
7. From the field select tool at the top, in the left panel, select related-lists
8. On the right side of the field select tool choose “PartnerTap Partners” and drag it into your layout
9. Once the object is in your layout click the wrench icon on the “PartnerTap Partners” object
10. Choose the following to include in the layout:
    a. **Partner Company, Partner Account Type, Partner Rep Name, Partner Phone, Partner Email, Partner Title**
11. From the field select tool at the top click “Save”

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Classic Installation Instructions

1. Install the PartnerTap Salesforce Managed Package from the Salesforce AppExchange. Or by using the Install URL provided by Customer Success.
2. Click “Setup” near the top of the page
3. In the side menu navigate to Customize → Accounts → Page Layouts
4. Pick the Account layout you wish to edit
5. From the field select tool at the top, in the left panel, select related-lists
6. On the right side of the field select tool choose “PartnerTap Partners” and drag it into your layout
7. Once the object is in your layout click the wrench icon on the “PartnerTap Partners” object
8. Choose the following to include in the layout:
    a. **Partner Company, Partner Account Type, Partner Rep Name, Partner Phone, Partner Email, Partner Title**
9. From the field select tool at the top click “Save”

Visibility of PartnerTap records in Salesforce

By default PartnerTap records are set to “Private” meaning only the record owner and their superiors can see the partner record associated with an Account or Opportunity object.

If you would like to make PartnerTap mapped partner records public to everyone you can adjust sharing settings by following these steps:

1. Navigate to Security → Sharing Settings
2. Click ‘edit’
3. Locate the PartnerTap custom objects
4. Select the sharing setting that fits your needs (This takes some time to process)

Reporting Setup (Classic)

1. Create campaign "PartnerTap Partner Sourced"
2. Click "Advanced Setup" and create a "Member Status" called "Partner Sourced Opp" and check the box "Responded"
3. Create campaign ""PartnerTap Partner Accelerated"

Uninstall Instructions (Classic & Lightning)

1. Navigate to "Setup"
2. In the quick search search for "Package"
3. Navigate to "Installed Packages"
4. Find "PartnerTap Connect for Salesforce" and click "uninstall"
5. Follow the directions for optional backup of data if desired

Deleting PartnerTap Partner Records (Classic Only)

If for any reason you need to remove the PartnerTap mapped partner records follow this guide:

In order to do this, we need to first make sure the custom object truncate is enabled in the User Interface settings.

To do this:

1. Navigate to Setup >> Customize >> User Interface.
2. Select the "Enable Custom Object Truncate" setting in the Setup section as shown below
3. Save the changes.

Once enabled:

1. Navigate to Setup >> Create >> Object
2. Select "PartnerTap Partners"
3. At the top click "Truncate".

Then navigate to the trunc object that is created and delete it:

1. Navigate to: Setup >> Create >> Object >> Deleted Objects (at the bottom)