# GoToAssist Corporate
## GoToAssist for Salesforce

Installation Guide

# Contents

# Install GoToAssist for Salesforce

In order to streamline your support operations and deliver quick, seamless session connections with the GoToAssist for Salesforce application, you must first install it into your salesforce.com instance.

▶ **To install the GoToAssist Integration for Salesforce**

1. Visit the [GoToAssist for Salesforce](#) AppExchange listing and click **Get it Now.**

2. Select your environment type (*Production* or *Sandbox*).

3. When prompted, log in with your administrator user account. You will be presented with the list of items in the GoToAssist for Salesforce AppExchange package, including Apps, Objects and Code.

4. Click **Continue**.
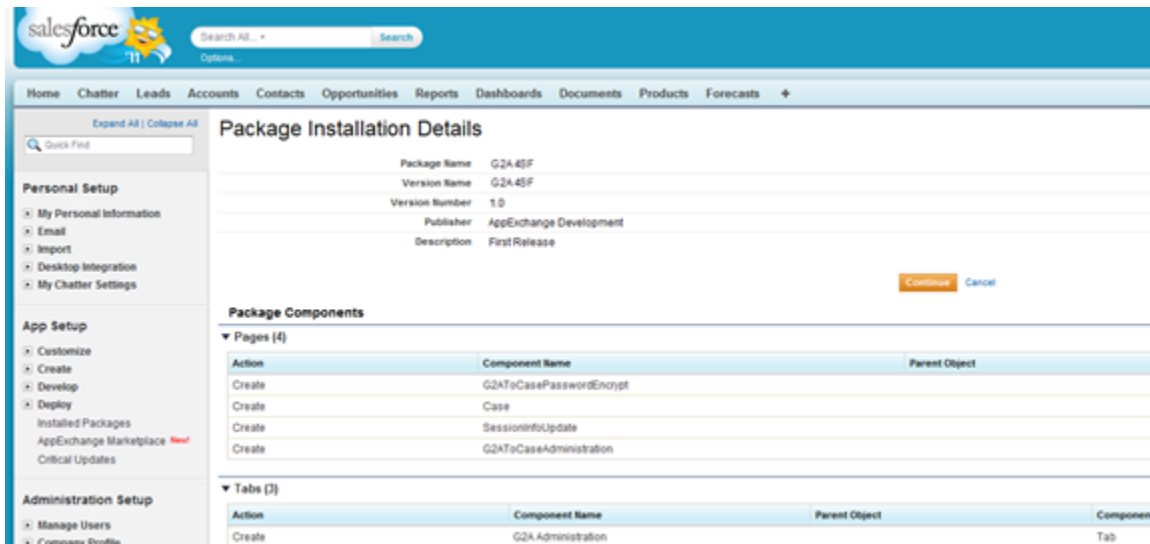


5. Approve the package API access. This allows you to use the API to access certain objects.
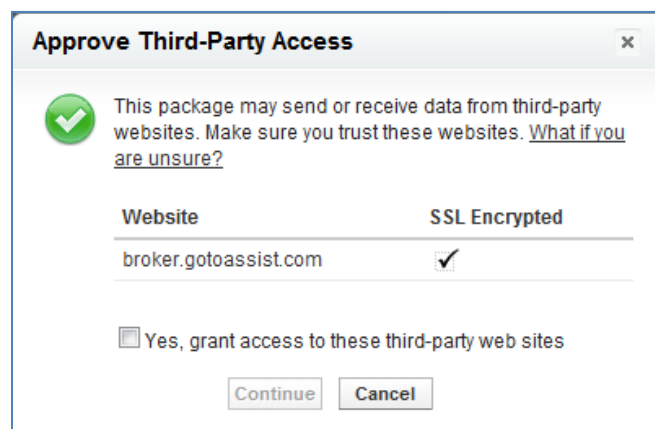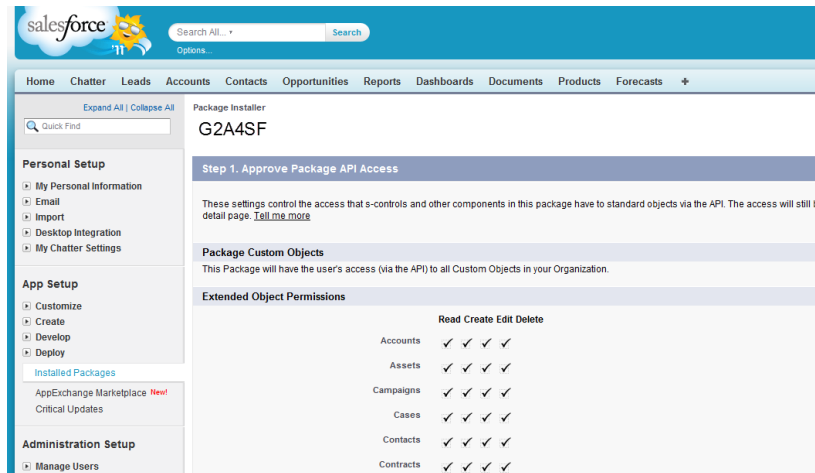
6. Select the security level. We recommend selecting *Grant access to admins only* at first until you are ready to roll the functionality out to all appropriate roles. If you select *Grant access to all users*, any user who logs in will be able to see GoToAssist for Salesforce objects and tabs.
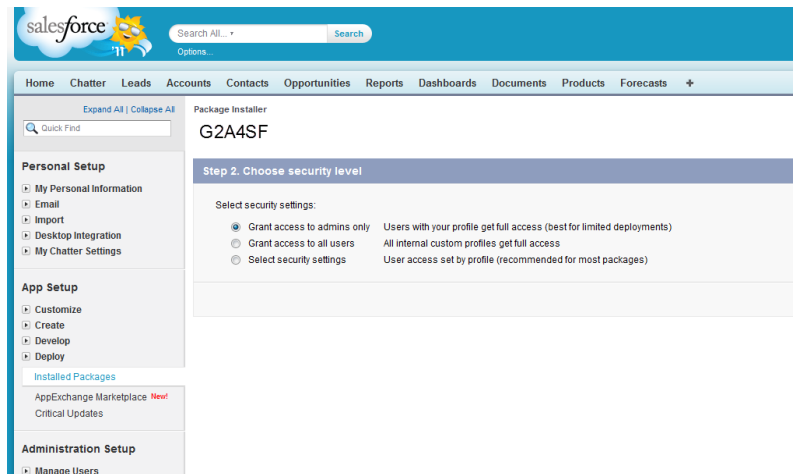


7. Click **Install** to finish the installation. You will receive an email notification once the install completes.
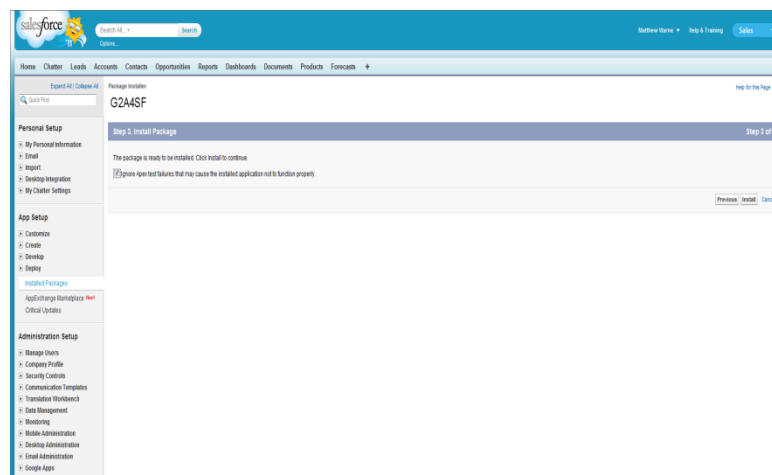


GoToAssist for Salesforce managed package is now installed in your org.

# Customize GoToAssist for Salesforce

Upon deploying the managed package, you must perform the following steps to make your app fully functional. Additionally, you can customize the application by setting permissions and adding buttons, links and images to your layout and related lists.

## Deploy Custom Objects

An integral part of the installation, you must deploy the custom objects to install every managed package in Salesforce.

▶ **To deploy the custom objects**

1. Navigate to *App Setup > Deploy > Installed Packages*.

2. Select the G2A4SF package to open the app details.

3. Click **Deploy**.

**Note:** This step is useful for non-system admin users looking to use this application.

## Configure an Email Service

A Salesforce Email Service is used to receive, process and associate the GoToAssist session information with a Salesforce case. To do this, the email address for this service needs to be registered with a GoToAssist support portal through the GoToAssist Management Center.

▶ **To set up the new email service**

1.  Navigate to *App Setup > Develop > Email Services*.

2.  Select *New Email Service*.

3.  Set the *Email Service Name* to <u>G2A4SF</u>.

4.  Set the *Apex Class* to <u>G2AToCaseUpdate</u>.

5.  Select the *Active* checkbox.

6.  Configure the rest of the email settings for the service as per your organization's requirements. We recommend that you requeue or bounce email addresses and enable error email routing to one of your system administrators.

7.  Click **Save and New Email Address**.

8. Verify that the *Accept Email From* field is blank.

9. Select the *Active* checkbox.



10. Select the Email Service (G2A4SF) that was just created.

11. Under *Email Addresses*, copy the email address. This email address will be used in the GoToAssist Management Center to direct completed session emails to Salesforce.

## Send Completed Session Emails to Salesforce

GoToAssist session information can be associated with Salesforce cases. To complete this process, a company manager will need to enter the Email Service address in the *Email Notification for Completed Sessions* field within the GoToAssist Management Center.

▶ **To associate GoToAssist session information with Salesforce cases**

1. Log into the GoToAssist Management Center with company manager credentials.

   [https://www.gotoassist.com/manager/](https://www.gotoassist.com/manager/)

2. Navigate to the *Portals* section.

3. For each Portal, paste the newly created Salesforce email address into the *Email Notification for Completed Sessions* dialog.

4. Click **Save Settings**.

## Customize Layout Pages

There are two objects that need to be added to either a new or existing custom page layout: the **GoToAssist** button and the *GoToAssist Sessions* Related List.

▶ **To add the GoToAssist button**

1. In Salesforce, navigate to *App Setup > Customize > Cases > Page Layouts.*
2. *S*elect the Case Page Layout you want to modify. If you do not have any existing custom layout pages, choose the default *Case Layout*.
3. Click **Edit**.
4. Select *Buttons* in the *Layout Properties* section located at the top of the *Edit Layout* page.
5. Drag the **GoToAssist** button to the *Custom Buttons* box.
6. Click **Save**.
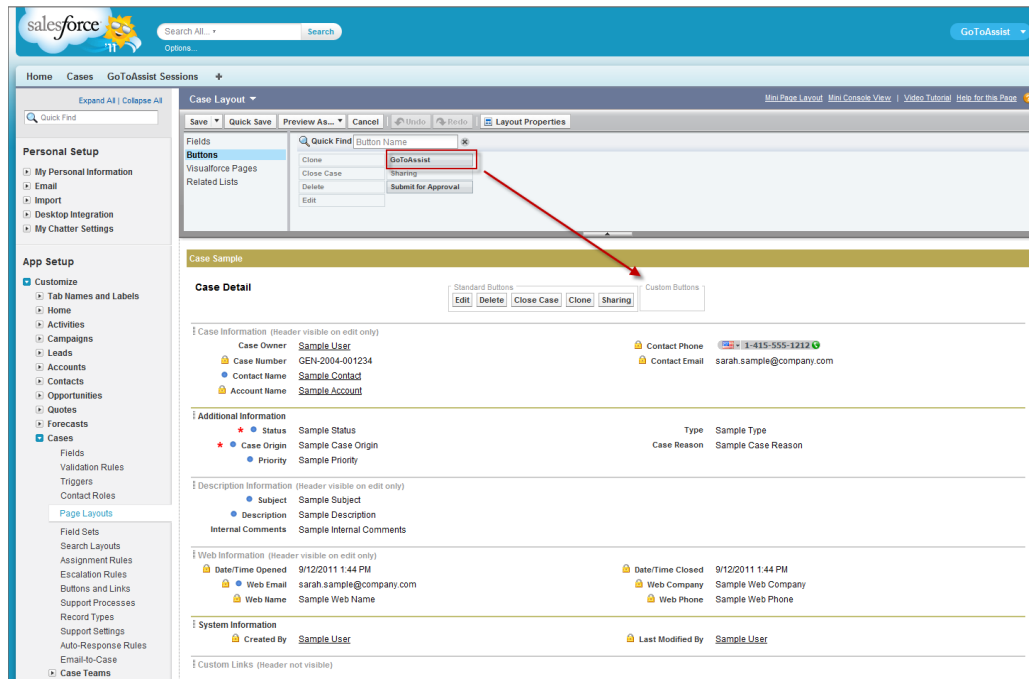


▶ **To add the GoToAssist Sessions Related List**

1. Navigate to *App Setup > Customize > Cases > Page Layouts.*
2. Select the Case Page Layout you want to modify. If you do not have any existing custom layout pages, choose the default *Case Layout*.
3. Click **Edit**.
4. Select *Related Lists* in the *Layout Properties* section located at the top of the *Edit Layout* page.
5. Drag the *GoToAssist Sessions* label to the desired location on the page.
6. Click **Save**.

## Enable Access to GoToAssist Login Credentials

First-time GoToAssist for Salesforce users are prompted for their GoToAssist representative login credentials. After the first time, these credentials are cached within Salesforce.

Additional custom fields on the *User Layout* page are required to manage and remove the email credentials cache.

### ▶ To add the GoToAssist Sessions Related List

1. Navigate to *App Setup > Customize > Users > Page Layouts.*

2. Select the User Page Layout you want to modify. If you do not have any existing user layout pages, choose the default *User Layout.*

3. Click **Edit**.

4. Select *Fields* from the *Layout Properties* section at the top of the *Edit Layout* page.

5. Drag the *G2A_Password* and *G2A_Username* custom fields to the *Additional Information* section.

6. Click **Save**.

## Log Incoming Emails

There is a custom object named *Incoming Emails* included in the package that logs incoming emails depending on the value chosen. You can track the incoming emails if the value of *Enable Email Logging* under *G2A Settings* is set to *True.*

To access this setting, you must first create the *Incoming Emails* tab.

### ▶ To create an Incoming Emails tab

1. Navigate to *App Setup > Create > Tabs.*

2. Click **New** next to *Custom Object Tabs.*

3. Set *Object* to <u>Incoming Email</u>.



4. Choose a *Tab Style.*

5. Click **Next**.

6. Select the visibility and which apps you want to add this tab to.

7. Complete the remaining selections according to your own preferences.

8. Click **Next**.

9. Click **Save**.

## Provide Access to User Profiles

By default, the custom objects in the managed package are only visible to the system administrator profile. Administrators can provide access to any user profiles that are going to run the application.

Standard profiles cannot be edited to give CRUD access to custom objects of the managed package, so the user will have to create a new profile by cloning the existing one. Make sure the custom objects are deployed (see Deploy Custom Objects, page 5) before beginning.

*Please note that these steps can only be carried on in Salesforce Enterprise Edition orgs. For Professional Edition and Group Edition, access needs to be granted at time of installation of G2A4SF: it may be necessary to uninstall the G2A4SF managed package and reinstall it again giving proper access to all profiles that are going to use it.*

▶ **To provide GoToAssist access to additional user profiles**

1. Navigate to *Admin Setup > Manage Users > Profiles.*

2. Select an existing profile to Clone or Click New to create a new profile.

3. If creating a new profile, select an Existing Profile from the dropdown or create a new profile.



4. Click **Save**

5. On the Profile Detail page, choose Edit.



6. Grant complete CRUD access of the *GoToAssist Sessions* and *Incoming Emails* custom objects to this profile.

7. From *Enabled Apex Class Access,* enable access to G24SF_G2ACaseUpdate.

8. From *Enabled VisualForce Page Access,* enable access to G2A4SF.Case, G2A4SF.G2AToCaseAdministration, G2A4SF.G2AToCasePasswordEncrypt and G2A4SF.SessionInfoUpdate.

| Enabled Apex Class Access | Edit | |
| --- | --- | --- |
| Apex Class Name | | AppExchange Package Name |
| G2A4SF.G2AToCaseUpdate | | G2A4SF |

| Enabled Visualforce Page Access | Edit | |
| --- | --- | --- |
| Visualforce Page Name | | AppExchange Package Name |
| G2A4SF.Case | | G2A4SF |
| G2A4SF.G2AToCaseAdministration | | G2A4SF |
| G2A4SF.G2AToCasePasswordEncrypt | | G2A4SF |
| G2A4SF.SessionInfoUpdate | | G2A4SF |

9. Click **Save**.

## Assign Custom Page Layout to Users

Users that require access to the custom pages will need to have their default *Case Layout* assigned to the new custom page layout.

▶ **To assign the custom page layout to users**

**Note:** These instruction assume that the custom page you created earlier is called G2A Case Layout.

1. Navigate to *App Setup > Customize > Cases > Page Layouts*.

2. Click **Page Layout Assignment** in the *Case Page Layouts* section.

3. Click **Edit Assignment**.

4. From the *Profiles* column, select the user for which you want to modify the page layout.

5. Select G2A Case Layout from the *Page Layout To Use* drop-down menu.



# View the GoToAssist Application

To view the GoToAssist for Salesforce tabs and layouts, select *GoToAssist* from the application menu in the top right corner of the Salesforce screen.