



**GoToAssist**  
Corporate

**GoToAssist Corporate**  
GoToAssist for Salesforce  
Installation Guide

## Contents

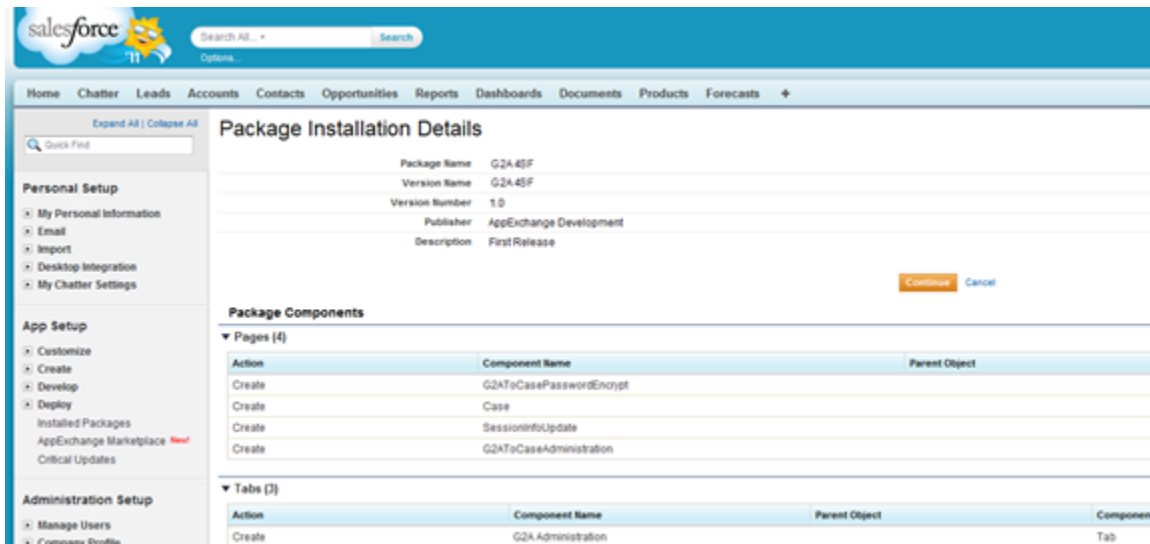
<b>Install GoToAssist for Salesforce</b>	<b>3</b>
<b>Customize GoToAssist for Salesforce</b>	<b>5</b>
Deploy Custom Objects	5
Configure an Email Service	6
Send Completed Session Emails to Salesforce	8
Customize Layout Pages	9
Enable Access to GoToAssist Login Credentials	10
Log Incoming Emails	10
Provide Access to User Profiles	11
Assign Custom Page Layout to Users	13
<b>View the GoToAssist Application</b>	<b>13</b>

## Install GoToAssist for Salesforce

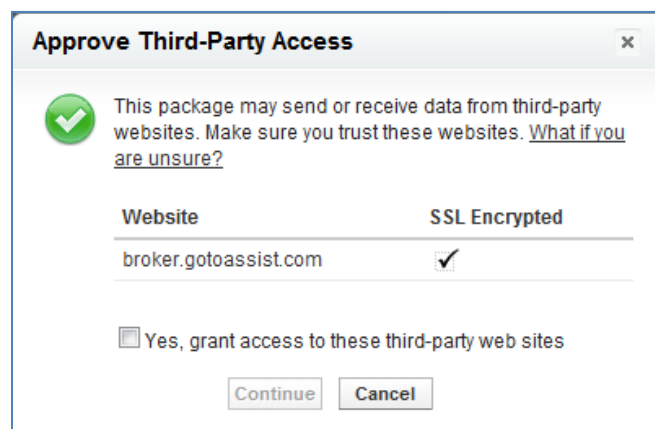
In order to streamline your support operations and deliver quick, seamless session connections with the GoToAssist for Salesforce application, you must first install it into your salesforce.com instance.

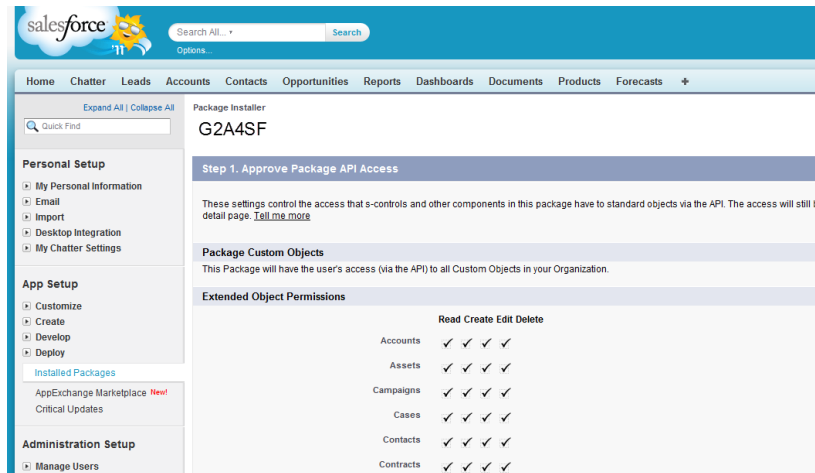
### ► To install the GoToAssist Integration for Salesforce

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**.

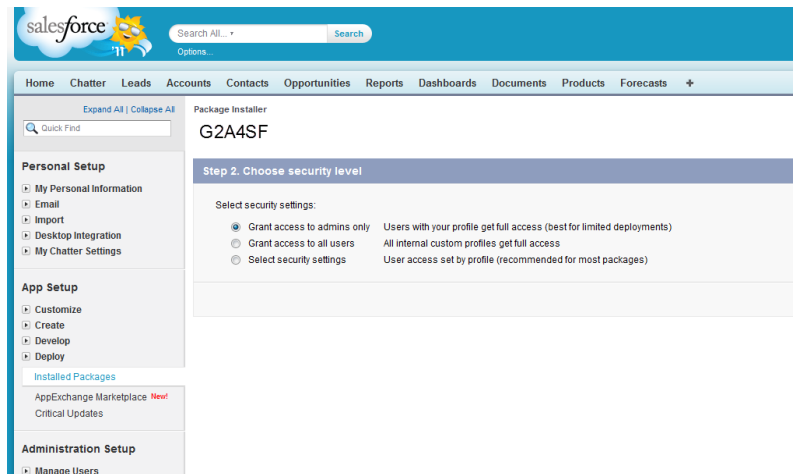


5. Approve the package API access. This allows you to use the API to access certain objects.

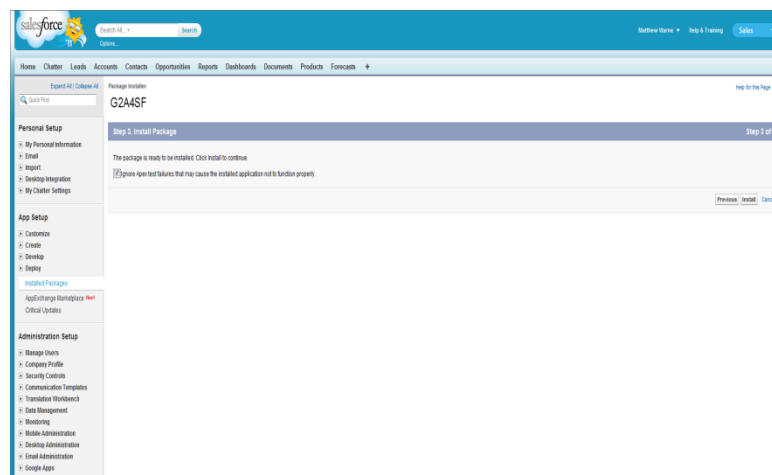




6. Select the security level. We recommend selecting *Grant access to admins only* at first until you are ready to roll the functionality out to all appropriate roles. If you select *Grant access to all users*, any user who logs in will be able to see GoToAssist for Salesforce objects and tabs.



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.

The screenshot shows the 'Package Details' for 'G2A4SF (Managed)'. At the top, there is a link '< Back to List: Installed Package'. Below the package name, there is a section titled 'Installed Package Detail' with three buttons: 'Uninstall', 'Deploy', and 'Show Dependencies'. A red arrow points to the 'Deploy' button. Below this, there is a table with the following details:

Package Name	G2A4SF	Version Number	1.0
Language	English	First Installed Version Number	1.0
Version Name	G2A Release 1	Package Type	Managed
Namespace Prefix	G2A4SF	API Access	Unrestricted <a href="#">[Enable Restrictions]</a>
Publisher	Publishing Org - G2A 2nd Package	Modified By	<a href="#">Pratik Tanna</a> 9/12/2011 11:49 AM
Description			
Installed By	<a href="#">Pratik Tanna</a> 9/12/2011 11:49 AM		

At the bottom of the table, there are three buttons: 'Uninstall', 'Deploy', and 'Show Dependencies'.

## 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 G2A4SF.
4. Set the *Apex Class* to G2AToCaseUpdate.
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**.

The screenshot displays the Salesforce 'Email Service' configuration interface. The left sidebar contains navigation menus for 'Personal Setup', 'App Setup', and 'Administration Setup'. The main content area is titled 'Email Service' and includes the following sections:

- Email Service Information:**
  - Email Service Name: G2A4SF
  - Apex Class: G2AToCaseUpdate
  - Accept Attachments: None
  - Advanced Email Security Settings: ☒
  - Accept Email From: [Empty field]
  - Truncate Oversize Email (Text and HTML): ☒
  - Convert Text Attachments to Binary Attachments: ☒
  - Active: ☒
- Failure Response Settings:**

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below.

  - Over Email Rate Limit Action: Bounce message
  - Deactivated Email Address Action: Bounce message
  - Deactivated Email Service Action: Bounce message
  - Unauthenticated Sender Action: Bounce message
  - Unauthorized Sender Action: Bounce message
  - Enable Error Routing: ☒
  - Route Error Emails to This Email Address: error\_noreply@simuscorp

Buttons for 'Save', 'Save and New Email Address', and 'Cancel' are located at the top right and bottom right of the configuration area.

8. Verify that the *Accept Email From* field is blank.
9. Select the *Active* checkbox.

**Email Service Information**

Save Save and New Email Address Cancel

Email Service Name: G2A4SF

Apex Class: G2AToCaseUpdate

Accept Attachments: None

Advanced Email Security Settings: ☐

Accept Email From:

Truncate Oversize Email (Text and HTML): ☐

Convert Text Attachments to Binary Attachments: ☐

Active: ☒

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.

**Email Service: G2A4SF**

Edit Deactivate Cancel

Email Service Name: G2A4SF

Apex Class: G2AToCaseUpdate

Accept Attachments: None

Advanced Email Security Settings: ☒

Accept Email From: All email addresses (subject to security settings)

Truncate Oversize Email (Text and HTML): ☐

Convert Text Attachments to Binary Attachments: ☐

Active: ☒

**Failure Response Settings**

Over Email Rate Limit Action	Bounce message
Deactivated Email Address Action	Bounce message
Deactivated Email Service Action	Bounce message
Unauthenticated Sender Action	Bounce message
Unauthorized Sender Action	Bounce message
Enable Error Routing	<input checked="" type="checkbox"/>

Route Error Emails to This Email Address: [colg2a@v-3mx645ttvwzq8ac2a6icov.uhmbbmao.u.apex.salesforce.com](mailto:colg2a@v-3mx645ttvwzq8ac2a6icov.uhmbbmao.u.apex.salesforce.com)

**Email Addresses**

New Email Address

Action	Email Address
View   Edit	<a href="mailto:colg2a@v-3mx645ttvwzq8ac2a6icov.uhmbbmao.u.apex.salesforce.com">colg2a@v-3mx645ttvwzq8ac2a6icov.uhmbbmao.u.apex.salesforce.com</a>

## 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/>

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**.

**GoToAssist Corporate**

MANAGEMENT

Home  
Dashboard  
Reports  
Session Review  
Representatives  
Teams  
■ Portals  
    Business Hours  
Managers  
Downloads  
My Settings  
Support

Language | Help | Log Out

### Edit Portals: G2P Help Website

Modify settings for this portal.

[View current portal representatives.](#)

#### Portal Settings

Enable functions at portal and representative levels to give them to a representative.

Functions:

<input checked="" type="checkbox"/> Customer screen sharing	<input checked="" type="checkbox"/> Representative screen sharing
<input checked="" type="checkbox"/> Record customer screen sharing	<input checked="" type="checkbox"/> Record representative screen sharing
<input checked="" type="checkbox"/> Send files	<input checked="" type="checkbox"/> Receive files
<input checked="" type="checkbox"/> Allow run as a service	<input checked="" type="checkbox"/> Allow start as a service
<input checked="" type="checkbox"/> Uninstall service on session end	<input checked="" type="checkbox"/> Enable sound for customer on chat receipt
<input checked="" type="checkbox"/> Allow Annotations	<input checked="" type="checkbox"/> Invite External Specialist

#### Email Notification for Completed Sessions

Enter an email address to receive information about completed sessions, such as customer and representative ratings.

Email Address:

Assigned Portal Business Hours Set:  
No Business Hours Sets assigned

Assigned Portal Business Hours Holidays/Events:  
No Business Hours Holidays/Events assigned  
[Manage Business Hours...](#)

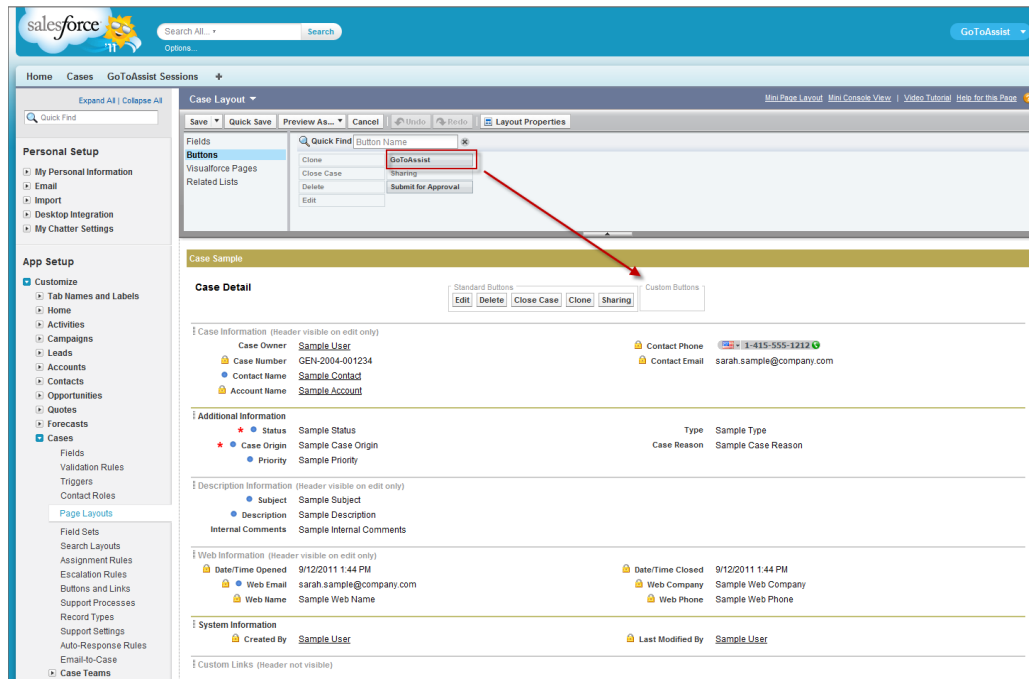


## Customize Layout Pages

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. 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 *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 Incoming Email.

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link:

Splash Page Custom Link:

Enter a short description:

Description:

click on this tab:

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**.

[illegible]

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	
<a href="#">Edit</a>	
Apex Class Name	AppExchange Package Name
<a href="#">G2A4SF_G2AToCaseUpdate</a>	<a href="#">G2A4SF</a>

Enabled Visualforce Page Access	
<a href="#">Edit</a>	
Visualforce Page Name	AppExchange Package Name
<a href="#">G2A4SF.Case</a>	<a href="#">G2A4SF</a>
<a href="#">G2A4SF.G2AToCaseAdministration</a>	<a href="#">G2A4SF</a>
<a href="#">G2A4SF.G2AToCasePasswordEncrypt</a>	<a href="#">G2A4SF</a>
<a href="#">G2A4SF.SessionInfoUpdate</a>	<a href="#">G2A4SF</a>

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 instructions 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.

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. T

Profiles	Page Layout
Content Only User	Case Layout
Contract Manager	Case Layout
Customer Portal Manager	Case Layout
Customer Portal Manager Custom	Case Layout
Customer Portal Manager Standard	Case Layout
Customer Portal User	Case Layout
Force.com - One App User	Case Layout
Gold Partner User	Case Layout
High Volume Customer Portal User	Case Layout
Marketing User	Case Layout
Read Only	Case Layout
Solution Manager	Case Layout
Standard Platform User	Case Layout
Standard User	Case Layout
Standard User G2A	G2A Case Layout
System Administrator	G2A Case Layout

## 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.

