UNIVERSAL PICKLISTS
IMPLEMENTATION GUIDE

ToAFinish

UNIVERSAL PICKLISTS FOR SALESFORCE.COM

Implementation Guide

12407 MoPac Expwy N • Suite 250
Austin, TX 78758
Phone 512.436.3464 • Fax 267.935.7773

Table of Contents

Introduction to this Implementation Guide ______ *2*

Introducing Salesforce.com ______ 3

Introducing To A Finish ______ 4

Introducing the Universal Picklists App ______ 5

Free vs. Paid App Comparison ______ 5

Before You Begin, Requirements ______ 6

Warning: Test First! ______ 6

Configuration ______ *7*

Setting Up Your Org's "Remote Site" ______ 8

Adding a Picklist to Manage ______ 10

Upgrading Your App ______ 12

Setting up Additional Orgs (Paid Only) ______ 13

Version 2016.09.11

Chapter

1

Introduction to this Implementation Guide

Introducing all the key components of the Universal Picklists App for Salesforce.com

This manual will help you through the implementation of the Universal Picklists app for your Salesforce.com Org. You can read this chapter if you desire to do so, but most users can probably start at the next chapter, where the installation and configuration instructions begin.

Thank you for considering our app in your organization.

ICON KEY
Details You Can Skip
Don't Miss This!
Sample Code
Danger!

To succeed in the installation process you will need to pay close attention to all of the information contained in this manual. We recommend reading through this first chapter before you begin, and then reading through each section as you work on it.

The Icon Key to the left shows the icons you will be seeing as you go through this manual. The more advanced readers can skip some of the details as indicated by the appropriate icon.

This manual is a work in progress, so please do take notes and let us know if you run into any issues with the text or if you believe there is a better way to accomplish the tasks we describe.

Introducing Salesforce.com

Salesforce.com's CRM solution is broken down into several broad categories: Sales Cloud, Service Cloud, Data Cloud (including Jigsaw), Collaboration Cloud (including Chatter) and Custom Cloud (including Force.com). Below, we'll highlight a few of them.

The Sales Cloud

The Sales Cloud includes a real-time sales collaborative tool called Chatter, provides sales representatives with a customer profile and account history, allows the user to manage marketing campaign spending and performance across a variety of channels from a single application, tracks opportunity-related data including milestones, decision makers, customer communications, and other information unique to the company's sales process. Automatic email reminders can be scheduled to keep teams up to date.

Other activities on the Salesforce cloud include using the Jigsaw business data to access business contacts, and designing and automating processes in Salesforce CRM.

The Service Cloud

The Service Cloud provides companies with a call center-like view that enables them to create and track cases coming in, and automatically route and escalate what's important. The Salesforce CRM-powered customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email, chat, Google search, and access to customers' entitlement and contracts.

The Force.com Platform

Salesforce.com's platform as a service (PaaS) product is known as Force.com. The Force.com platform allows external developers to create add-on applications that integrate into the main salesforce.com application and are hosted on Salesforce.com's infrastructure.

These applications are built using Apex (a proprietary Java-like programming language for Force.com) and Visualforce (an XML-like syntax for building user interfaces in HTML or Flex).

Web Services

In addition to the web interface, salesforce.com offers a **SOAP/REST Web service API** that enables integration with other systems. This is the technology we will be using to power the integration with ETAdirect.

You can continue reading more on Salesforce.com at WikiPedia.com.

Introducing To A Finish

To A Finish™ is a concept company that has grown out of a desire to improve the Salesforce CRM consulting industry. Too often we have found the priorities of consulting companies skewed towards speed and profitability, rather than excellence and long-term success. This is not a blanket statement about all consulting companies, rather a general statement of the industry at large.

We believe there is a different way of consulting that will bring ultimate success to any CRM venture. The biggest difference is time. We give special attention to steps that are often rushed or even overlooked entirely in a typical project. Things like in-depth analysis, getting to really know a business, documentation and end-user involvement in the process help us set up a project for success. Ultimately, we must spend the time to do the work until it is absolutely complete; To A Finish™.

We are not guaranteeing our clients will never see a bug or have to rethink initial strategies. Reworking is actually part of the process of achieving success. What we are saying is that our strategies and focus will minimize unforeseen problems and achieve for us an ultimately successful project completion. We put our name on our work and stake our reputation on quality service.

Test us. Allow us to show you the difference of doing work To A Finish™.

You can find more about To A Finish at www.toafinish.com

ToAFinish

When you finish a thing you ought to be able to say to yourself: "There, I am willing to stand for that piece of work. It is not pretty well done; it is done as well as I can do it; done to a complete finish. I will stand for that. I am willing to be judged by it."

- O.S. Marden

Introducing the Universal Picklists App

Salesforce.com picklist fields keep your data standardized and clean. Sometimes, however, you have the same list of choices in several different Orgs, the Industry or Lead Source fields, for example. Administrators have historically been forced to manage these lists in separate places.

No longer. Presenting: ***Universal Picklists for Salesforce.***

You now have one place to manage your picklists, no matter if these picklists are used in multiple places. The free version will be all most administrators will need. For advanced functionality, like maintaining picklists across multiple Orgs, please upgrade to the paid version.

Free vs. Paid App Comparison

The Paid version of Universal Picklists includes many advantages. See a chart comparing the versions below:

Feature	Free	Paid
Technical Support		✔
Number of Picklists	**5**	**Unlimited**
Standard Objects	✔	✔
Custom Fields (in Standard Objects)		✔
Dependent Picklists	✔	✔
Custom Objects		✔
*** Multiple Orgs**		✔

* The *Multiple Orgs* feature allows you to maintain your picklists in your Production Org and synchronize them with all of your sandboxes. (Only one Production org/license.)

Before You Begin, Requirements

Before you begin working with our app, you must have several components already in place and configured. We will not cover these components in detail, but will at least point you to where you can get the information you need.

Salesforce.com A production system Salesforce.com Org will be needed in order to set up the integration. A sandbox will be very helpful in this process as well. Any edition of Salesforce.com should work.

- Sales Cloud
- Service Cloud
- Custom Cloud (Force.com)

Warning: Test First!

Before you deploy this solution to your production Org, it is strongly recommended that you test it in a sandbox first.

This app is very, very powerful. It has the power to overwrite multiple fields, including field dependencies, with the click of a single button. If you are not careful, you could end up with a bunch of cleanup work.

Please always test any admin app of this type first, but in particular one that attempts to accomplish tasks which are usually not possible.

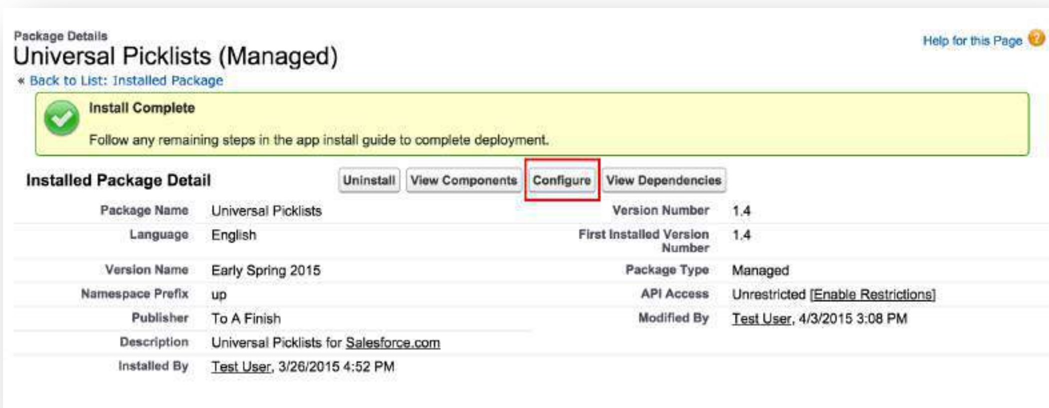
Test. Test. Test.

Chapter
2

Configuration

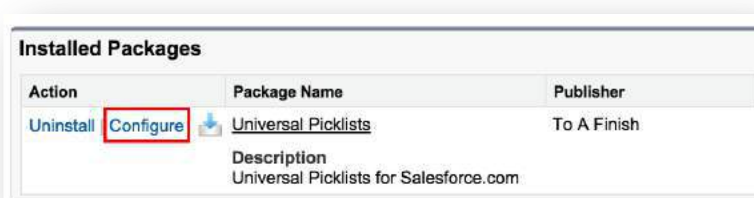
The steps necessary to set up the app for full use

The initial steps in the configuration are completed by clicking the "Configure" button on the Universal Picklists package after it has been installed from the AppExchange.com app store.



If you have already left the package installation screen, you can get back to the configuration page, by clicking: Setup → App Setup → Installed Packages

Click on the "Configure" link next to the Universal Picklists package.



Setting Up Your Org's "Remote Site"

The first thing you will see when you go to configure your Universal Picklist app, is a warning telling you that you need to set up a "remote site" before you can use the app. "Remote site" is the term used for the URL to access your Org's metadata.

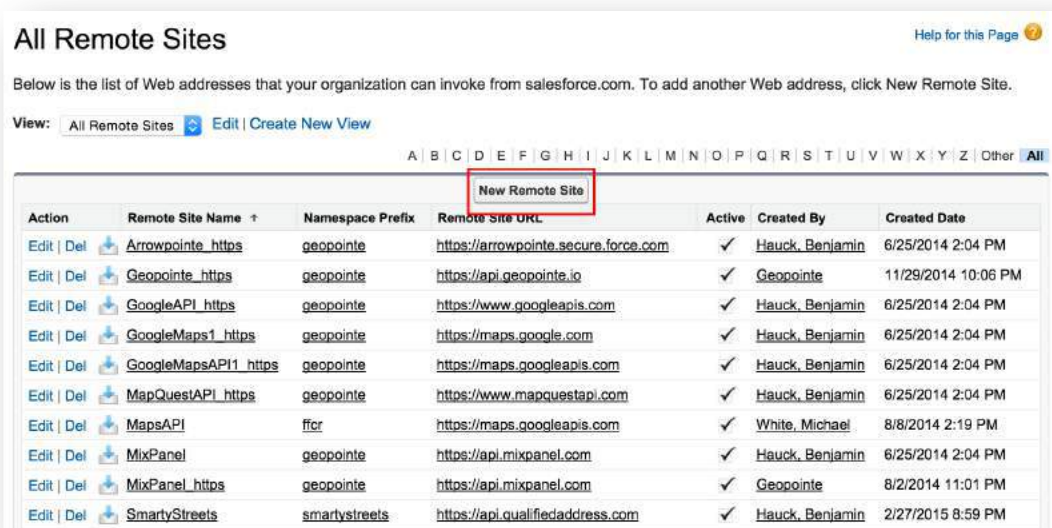
> ** Please note that To A Finish (the makers of this amazing app) cannot access your Org as this term might imply to some. This step is necessary so that you can access your own metadata (data about your data, including picklist options) through our app.*

Read more about the Remote Site settings from the Salesforce.com Developer documentation [here](#).

If you see this error, please follow these steps:

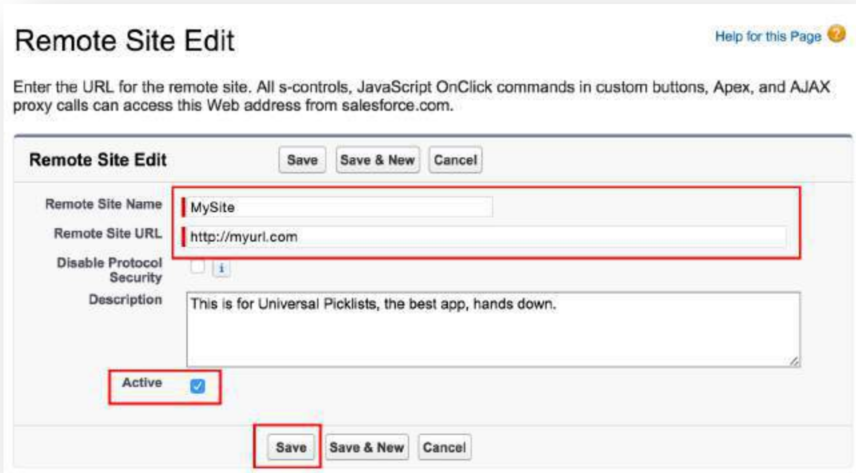
1) Copy the **endpoint** indicated in the error, starting with the "https://" and all the way through the end.

2) Now, go to: Setup → Security Controls → Remote Site Setup.



Action	Remote Site Name ↑	Namespace Prefix	Remote Site URL	Active	Created By	Created Date
Edit | Del	Arrowpointe_https	geopointe	https://arrowpointe.secure.force.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	Geopointe_https	geopointe	https://api.geopointe.io	✓	Geopointe	11/29/2014 10:06 PM
Edit | Del	GoogleAPI_https	geopointe	https://www.googleapis.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	GoogleMaps1_https	geopointe	https://maps.google.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	GoogleMapsAPI1_https	geopointe	https://maps.googleapis.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	MapQuestAPI_https	geopointe	https://www.mapquestapi.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	MapsAPI	ffcr	https://maps.googleapis.com	✓	White, Michael	8/8/2014 2:19 PM
Edit | Del	MixPanel	geopointe	https://api.mixpanel.com	✓	Hauck, Benjamin	6/25/2014 2:04 PM
Edit | Del	MixPanel_https	geopointe	https://api.mixpanel.com	✓	Geopointe	8/2/2014 11:01 PM
Edit | Del	SmartyStreets	smartystreets	https://api.qualifiedaddress.com	✓	Hauck, Benjamin	2/27/2015 8:59 PM

3) Click on the **New Remote Site** button.



4) In the Remote Site Edit dialog, enter any name for the **Remote Site Name**, and then paste the URL you copied in step #1 into the **Remote Site URL** field.

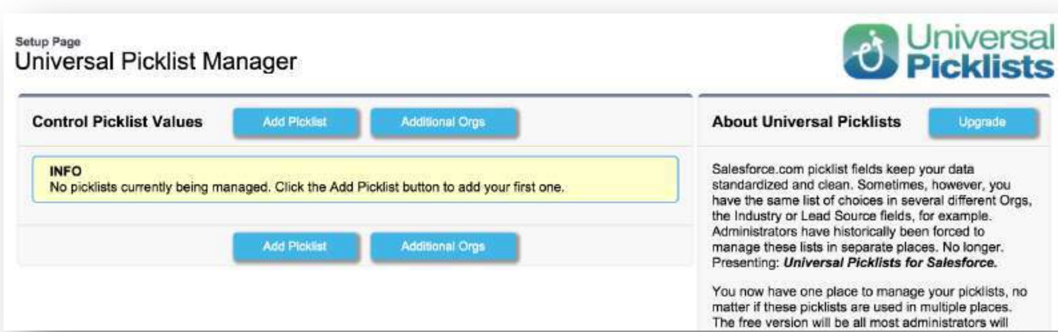
> * Note: If you have set up a Custom Domain/My Domain, you will want to add this in here as a Remote Site as well.

5) Make sure the **Active** checkbox is enabled, and press the **Save** button.

6) If you are using the paid version, and plan to manage picklists in your sandbox(es) from this Org, then please also add a Remote Site entry for: https://test.salesforce.com/

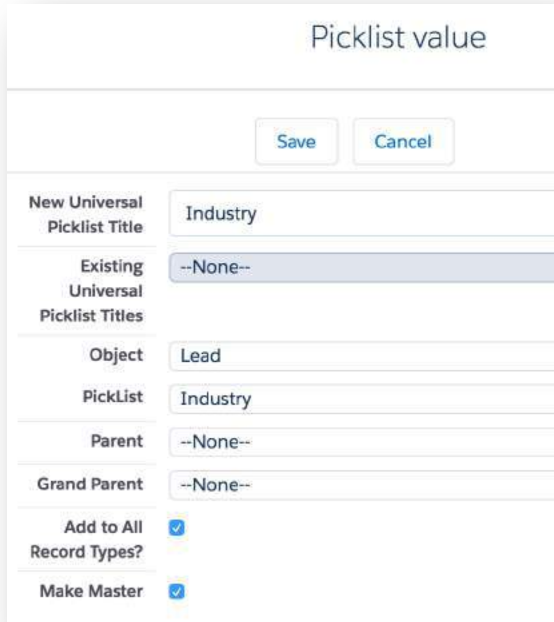
7) Now go back to configure Universal Picklists. Go to: Setup → App Setup → Installed Packages and click on the **Configure** link next to the Universal Picklists app.

You should see the Universal Picklist Manager setup page, alerting you that you have not yet set up any picklists.



Adding a Universal Picklist to Manage

Picklist values for the same or similar picklists in different objects (and different Orgs in the paid version) can be managed from one single location. If you have reached the setup page in the previous section, you can now follow these simple steps to set up a universal picklist.



1) Click the **Add Picklist** button.

2) From the Edit page, enter the **Title** of the picklist. To manage multiple picklists as one ***Universal Picklist***, give both of the records the **same** title.

   This title is critically important, as it determines the uniqueness of the picklist. In other words, if you add multiple picklists with this same title, the system will treat them all as the same universal picklist.

3) Select the desired **Object**.

4) Select the desired **Picklist** to manage. This is the picklist that will be updated when you sync.

5) Optional. Select a "Parent" picklist. This is for situations where the Picklist you are managing has a controlling parent picklist (the Picklist field would be the dependent picklist). You want to be able to make sure you can indicate which parent value fits the picklist value.

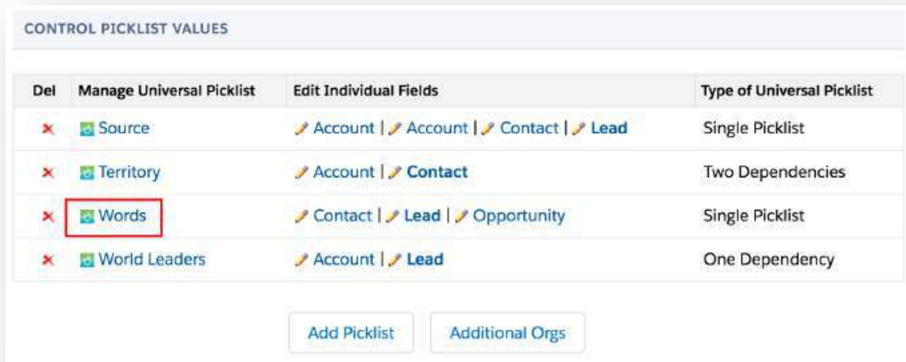
6) Optional. Select a "Grand Parent" picklist. This is for situations where the Picklist you are managing has a controlling picklist as a parent, that in turn has a controlling picklist, controlling it! (Any more than that, and you're on your own!)

7) Optionally click the "Add to All Record Types?" checkbox. This will add the value to the record types that exist for this object. *Note: Only 10 Record Types per Object are supported.*

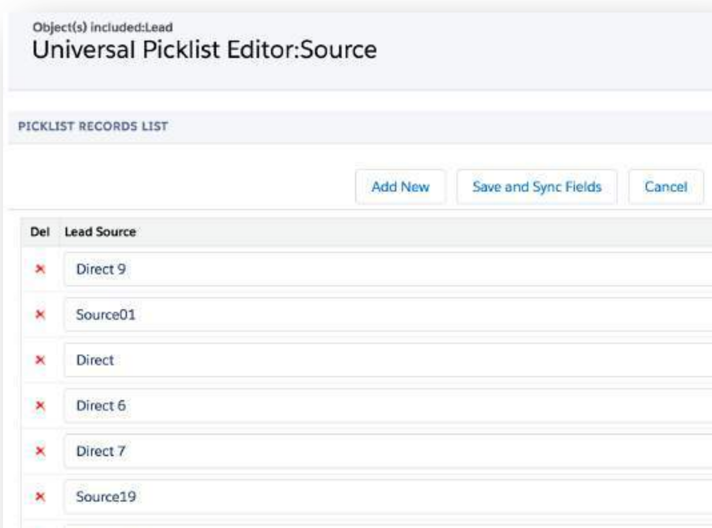
8) Click the "Make Master" checkbox to make this picklist the default one, which will be used when synchronizing the Universal Picklist you named.

9) Click the **Save** button, which will return you to the list of Universal Picklists.

Add as many records as you want (a maximum of three unique titles in the free version).



10) After adding the desired number of picklists, you will see a list of unique **Titles**, and potentially multiple Objects where the same Universal Picklist is being used. Click on the Title of the picklist you want to manage (not the "Edit" link).



11) You can now do several things:

    a. Click the **Add New** button in order to add another option to the list.

    b. Edit one of the existing entries directly in line.

    c. Sort the existing entries in alphabetical order by clicking the **Sort entries in Alphabetical Order**.

12) When finished, press the **Save and Sync Fields** button to save the values listed on the page to the picklists on all of the objects set up. You will get an email when the synchronization is done. With the paid version, it will do this in all the Orgs you have set up, in addition to the current Org.

Upgrading Your App

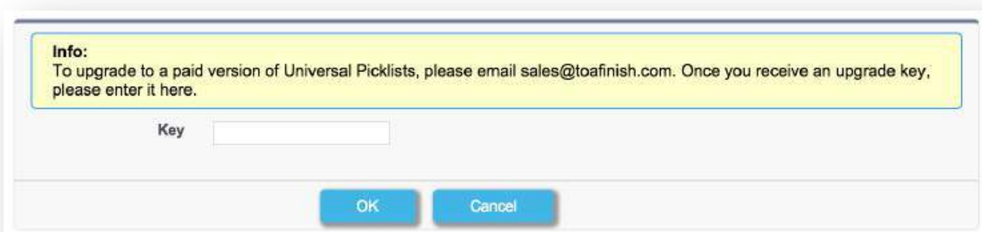
The free version of the app will allow you to maintain up to three Universal Picklists in a single Org. The paid version gives you much more. See page 7 of this Implementation Guide for a list of the advantages of the paid version.

To upgrade to a paid version, you will need to email sales@toafinish.com and give the following information:

- **Your Org Id**. (Go to Setup → Company Profile → Company Information)
- **Billing Contact Name** and **Billing Address**. This is the information where an invoice for the paid version will be sent.

The cost of the upgrade is $199 per year. However, the **Upgrade Key** should be emailed back within 24 hours, usually much less time than that.

Once you receive the upgrade key, click on the **Upgrade** button and paste the key into the box:



Once you have entered a valid key, press the OK button to unlock the paid functionality in the app.

Information on technical support will also be emailed to you at the same time as the key. Use this information for any questions you might have.

Setting up Additional Orgs (Paid Only)

Once you have upgraded to a paid version of the app, you can start controlling multiple Orgs from a single, master Org. We recommend setting up the app in your production system and then setting up multiple entries for each sandbox in your organization.

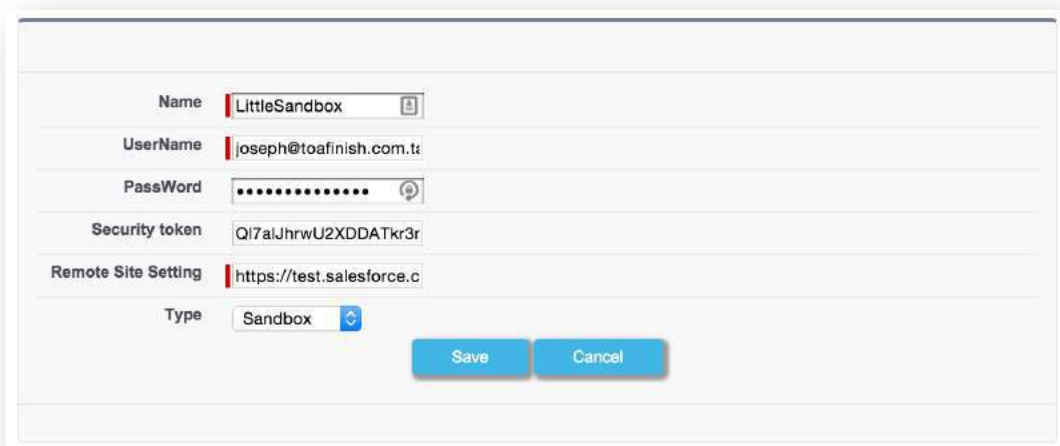
You can also control all picklists from a sandbox, but you run the risk of losing all of your work if the sandbox is refreshed.

Follow these steps to add additional entries to your list of Orgs to synchronize with when you press the Save and Sync Fields button on a universal picklist.

1) Press the **Additional Orgs** button.

2) Press the **New** button.

3) Enter all the information in the popup. When you press the **Save** button, the app will add a Remote Site to the current Org and verify that it can access the org.



Here are descriptions of what each field means:

Field	Description
Name	The name to be displayed on the list; also the name of the Remote Site that will be created in the current org. That means that the name cannot have any spaces in it.
Username	The username in email address format used to log into an Org
Password	The password used to log into an Org

Field	Description
Security token	The token needed by an external system to log into an Org. This is needed most cases, but not all. To get a security token, you can log into the desired Org and Go to: My Settings → Personal → Reset My Security Token. This will email you a new security token. NOTE: Do not do this if another external system is already using a security token, or else the previously issues token will be invalidated. Simply use the one that was email previously.
Remote Site Setting	This will usually be https://test.salesforce.com, but if the org you are adding has a custom domain, you might need to put it here. You can find it by simply logging into the Org and checking your browser's address bar.
Type	Select Production or Sandbox. Note that it is strongly recommended that you manage the Universal Picklists directly from your Production system, so you should not need to enter a production org here, but the Production option is available in case you need to manage picklists from a sandbox.

4) Once an Org is added, you can close the **Additional Org** list and from now on, every time you press the Save and Sync Fields button, the Orgs in this list will be updated.

Please note that you can only have one "Production" org in your Org list. If your organization uses more than one production org, you will need to purchase multiple copies of our app. Or, if you have the technical need to manage both production Orgs from a single location, please email techteam@toafinish.com and request a Premium Upgrade for the Universal Picklist app. Pricing on this unlisted Premium Upgrade will be determined based on the number of production Orgs needed.