Installation Introduction

This guide assumes that you have successfully installed and deployed IndustryComplete from the Salesforce.com AppExchange.

Please see https://na1.salesforce.com/help/doc/en/salesforce_appexchange_install_guide.pdf paying close attention to the section "Deploying Installed Packages".

If you encounter any problems with this please contact us at support@provenworks.com.

Initial Installation

Once IndustryComplete has been successfully installed from the AppExchange, go to the **IndustryComplete Administration** tab to complete the installation.
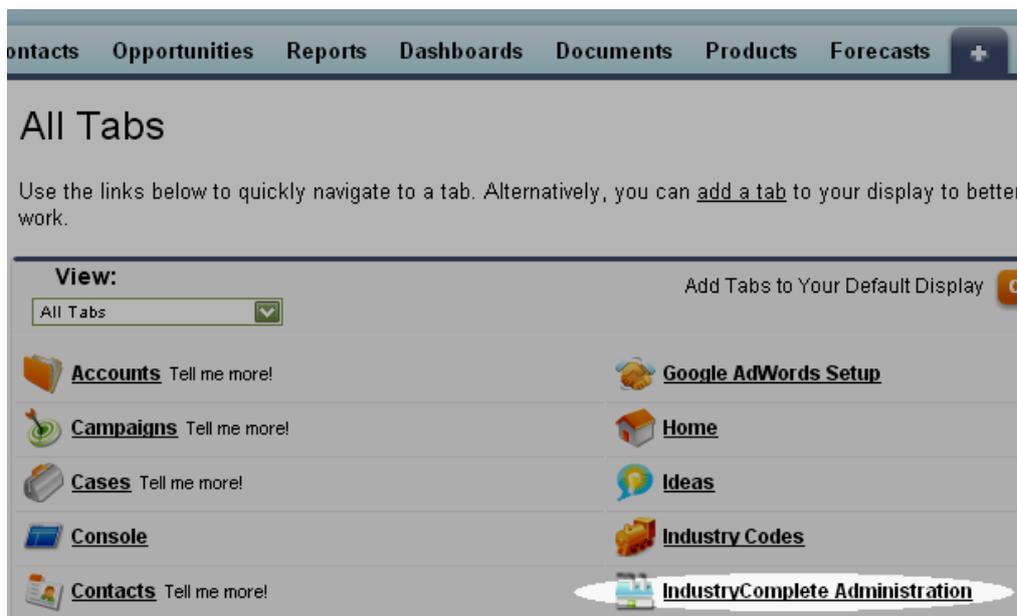

From the Administration tab you can install a list of Industry Codes with the Install Standard Industries button. This will take to a page where you may choose which standard of industry codes you would like to install. You may choose from the ISICr40, NAICS07 or USSIC87 industry classification codes.
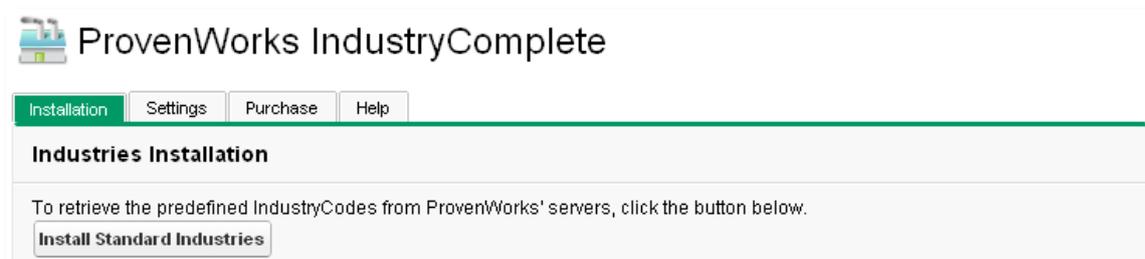
Sidebar Installation

The client-side elements of IndustryComplete are incorporated into Salesforce using a custom sidebar component.

First you need to place the IndustryComplete component onto the home page layout. Do this by going to the Salesforce Setup section which can be accessed by using the "**Setup**" link at the top of the salesforce.com interface. On the left hand tree menu expand **Customize -> Home -> Home Page Layouts**. Please note, if you have multiple home page layouts assigned to different users you will have to modify each layout to provide IndustryComplete to that group of users. Then to add the IndustryComplete component edit a home page layout and check "**IndustryComplete**" in the list of available narrow components. To finish the edit click the "**Next**" button and then the "**Save**" button on the following page.
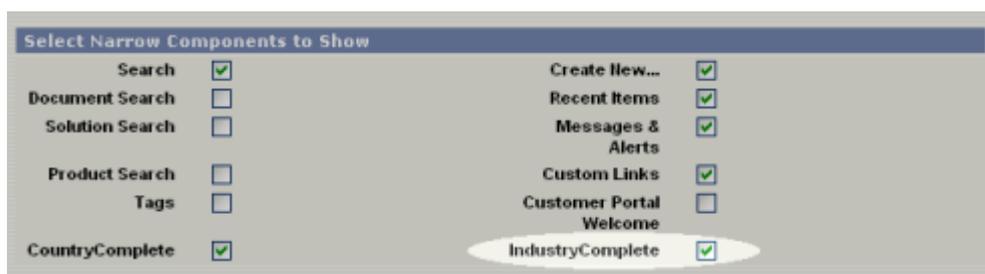
Once IndustryComplete is added to the home page layout we need to ensure this is used on every section of the salesforce.com interface. From the Setup section expand **Customize -> User Interface** then check the "**Show Custom Sidebar Components on All Pages**".
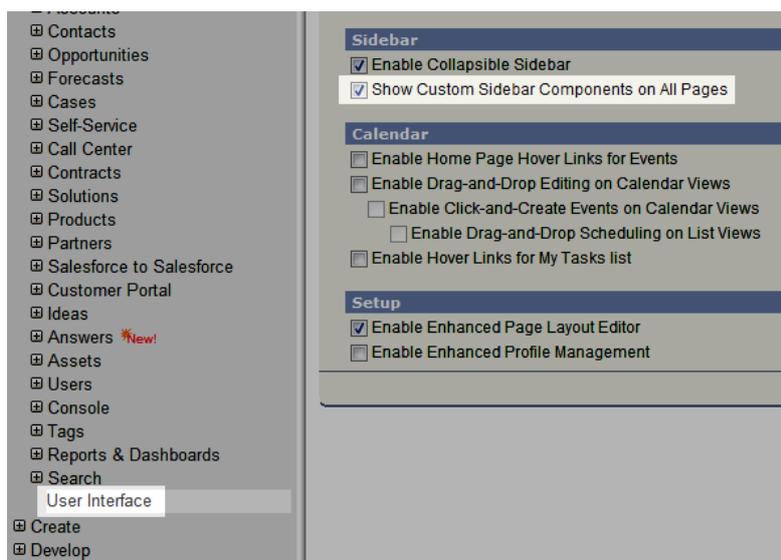
If any of your users have custom profiles with restricted permissions, ensure that they have read access to Documents (enabled by default). This can be granted in **Administration Setup > Manage Users > Profiles**, by selecting the custom profiles in question, and modifying Standard Object Permissions.

The IndustryComplete sidebar component should now appear on editable account pages. Pressing the Lookup Industry button will launch the search dialog.

Customizing Industries

If you would like to use another SIC standard or just modify the provided values, this can be easily done via the Industry Codes tab. Here the industries are exposed as standard force objects so they can be manipulated online, or modified using the Apex Data Loader.

SIC Code Field Visibility

The SIC Code Field may not be visible by default on Accounts in your organization. Confirm that your IndustryComplete user's profiles have visibility of this object in **Customize>Accounts>Fields**, click on the field name "SIC Code".

Custom Lookup Account SIC Description Field

You can create a SIC Code description field one of two ways, either with a custom lookup formula field, or by using our custom VisualForce component. To create the custom lookup formula field, go to **Customize> Account> Fields**, from "**Account Custom Fields & Relationships**" and click on "**New**" to create a new field.

Choose "**Formula**" for the Data Type. Enter "**SIC Description**" as the Field Label, and "**Text**" as the Formula Return Type. On the Formula page, select the Advanced Formula tab, and click "**Insert Field**".

On the Insert Field popup, select **Account>Industry Lookup>Description** as below, and click "**Insert**". On the next pages, make the field visible to the profiles you need, and add it to your account page layouts.

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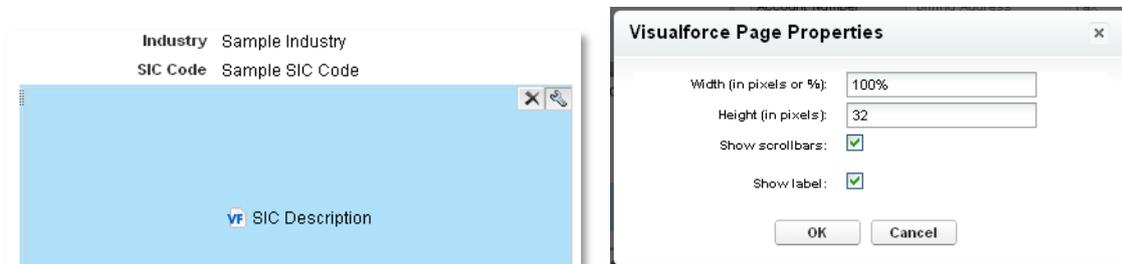You should now see the SIC description when viewing and Account with SIC populated using IndustryComplete.

VisualForce Account SIC Description Field

If you choose, you may add the custom VisualForce SIC description field included with IndustryComplete, this field can be added to specific page layouts, as opposed to the custom formula field which would be added to all accounts organization wide. This field will automatically lookup the description of an entered SIC Code each time the account page is displayed.

To add the field you must amend each Account Page Layout that you would like to display the field. Go to **Customize>Accounts>Page Layouts** and click edit on the first Page Layout you would like to amend. From the fields under VisualForce Pages, drag SIC Description to the location you would like it to appear on your account page. We suggest placing it underneath the SIC Code.

To customize, mouse-over the field and click on the wrench in the top right corner of the field. Set the field height to 32 pixels, and enable "**Show Label**" and "**Show Scrollbars**".
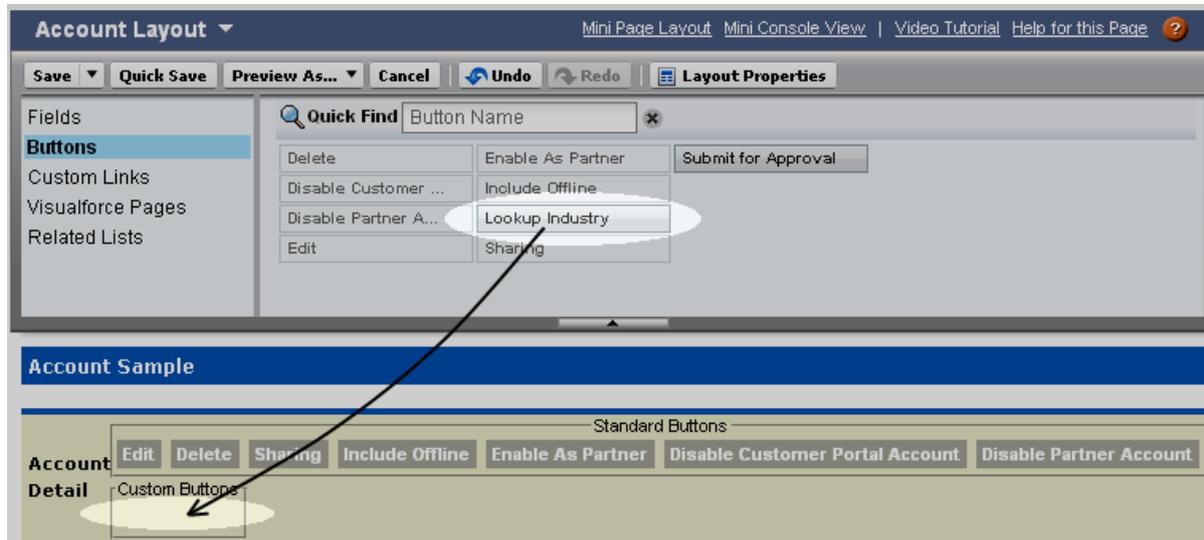
Custom Lookup Industry Account Button (Optional)

All you need to launch IndustryComplete is the Lookup Industry button provided on the sidebar. However, this isn't always completely obvious and can be lost if you have a large number of components on your sidebar. There is a simple way to install a Lookup Industry button onto the account layout, this is where users will likely expect to find a button which will modify the account record.

To do this navigate to **Setup -> Customize -> Accounts -> Page Layouts** then click Edit on the appropriate layout. When in the layout editor, open the Buttons section and drag the "**Lookup Industry**" onto the Custom Buttons area of the layout. Click the Save button to finalize your changes.

Help & Support

If you have any problems with installation or configuration please get in touch with us via email at support@provenworks.com.

We will be happy to answer any questions or problems that you may have.

Finally, if you can't find a product on the AppExchange to fit your needs, ProvenWorks offers bespoke CRM development and customization. Please get in touch with us at info@provenworks.com.