

# B2C ecommerce on Salesforce

Propel your business forward with **ForceGento**  
the cost effective integrated B2C ecommerce solution.

Learn More



## How to install and configure ForceGento App using Manage Package

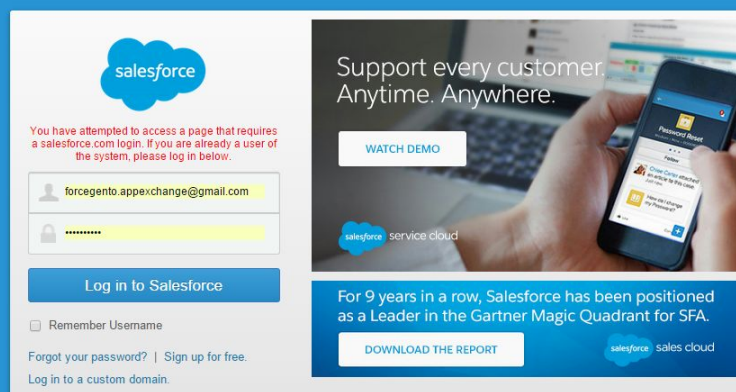
This guide will walk you through the installation of TechnoMile's ForceGento Application for your Salesforce Organization.

Note: Installation of TechnoMile's ForceGento Application is the same as any other AppExchange App. You may skip Part I of this document if you are already familiar with it. If you are not a system administrator but would like to install it anyway, you can install it into a free Developer Edition. Sign up at <http://developer.force.com>.

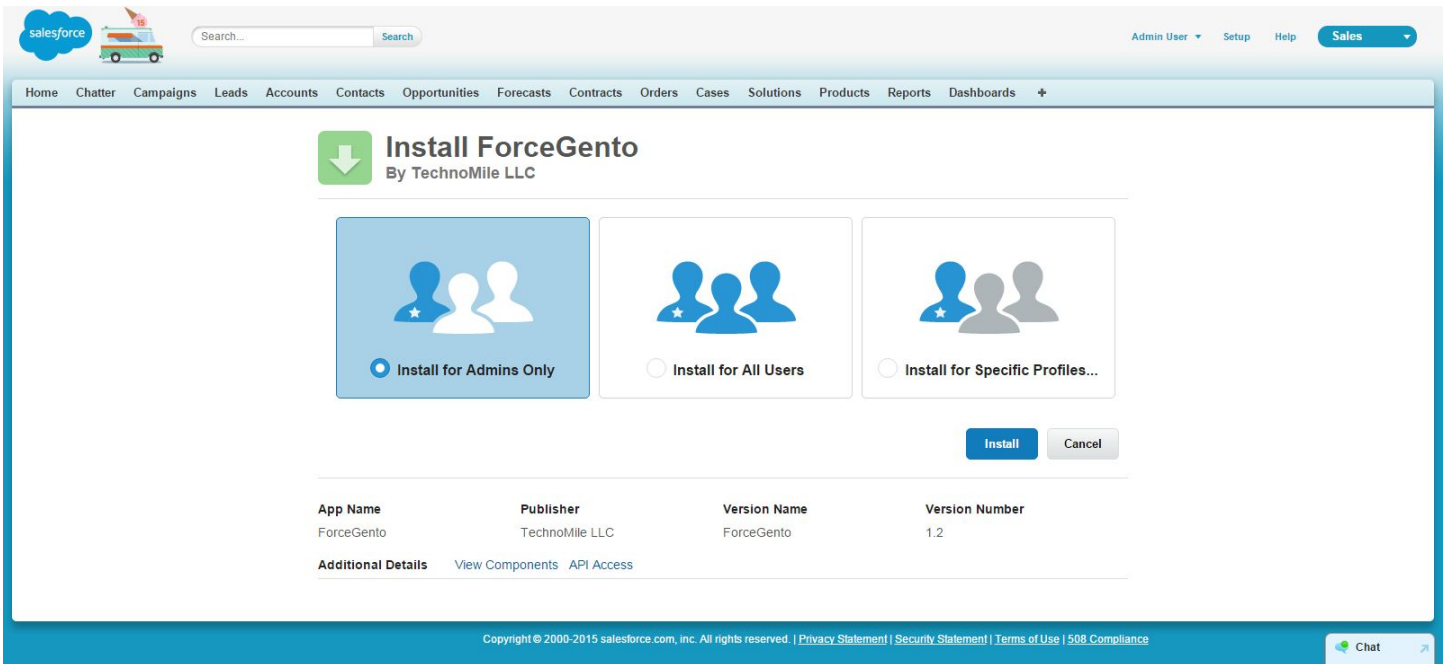
**Important: Once installation is complete, you must deploy the standard objects additional pick list values for the Account Type, Opportunity Stage & Product Family and finish your installation by following the instructions in Part II.**

### Part I

1. Run this manage package URL on browser.  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04to00000003xMk>
2. Enter your Salesforce credentials i.e. Username & Password.



3. **Note:** If you would like all users to be able to add ForceGento Application, select the “Grant Access to all users” radio button. If you would like specific users to be able to add ForceGento Application, select the “Select Security settings” radio button. If you would like only the admin users to be able to add ForceGento Application, select the “Install for All Users only” radio button.

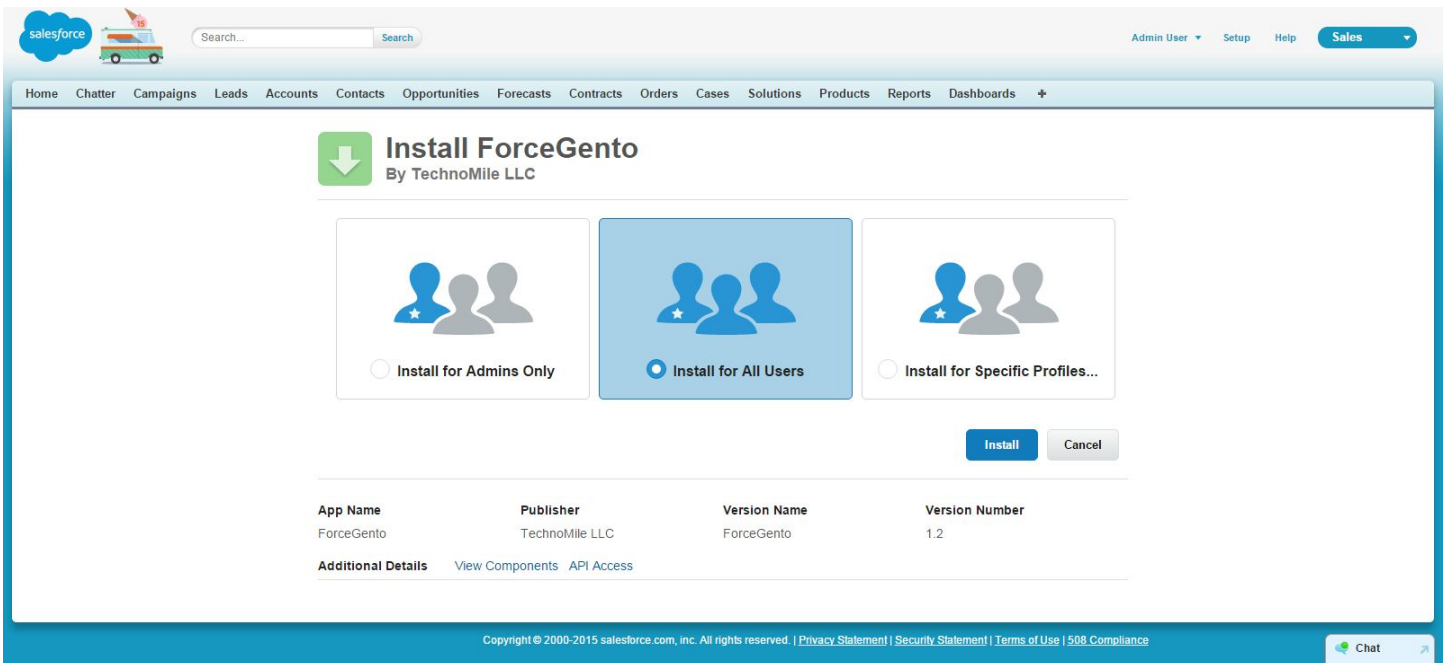


The screenshot shows the Salesforce App Store interface for installing the 'ForceGento' application by TechnoMile LLC. The page features three radio button options for user selection: 'Install for Admins Only' (selected), 'Install for All Users', and 'Install for Specific Profiles...'. Below these options are 'Install' and 'Cancel' buttons. A table at the bottom provides details about the application.

App Name	Publisher	Version Name	Version Number
ForceGento	TechnoMile LLC	ForceGento	1.2

Additional Details: [View Components](#) [API Access](#)

4. Click “Install”.

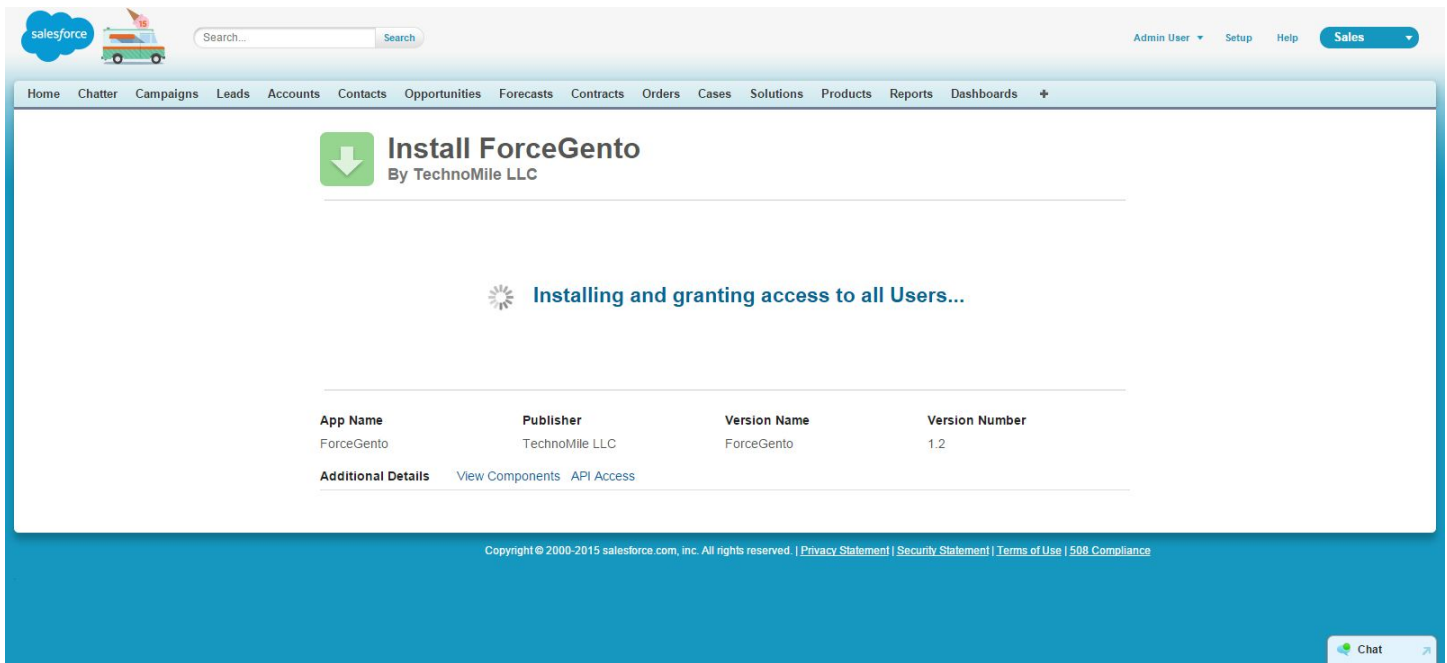


This screenshot shows the same 'Install ForceGento' page, but with the 'Install for All Users' radio button selected. The 'Install' button is highlighted in blue, indicating it is the active option.

App Name	Publisher	Version Name	Version Number
ForceGento	TechnoMile LLC	ForceGento	1.2

Additional Details: [View Components](#) [API Access](#)

5. It will take several minutes for the install to complete; you will be notified via an email.





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Search...

Admin User Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards +

 **Install ForceGento**  
By TechnoMile LLC

 **Installing and granting access to all Users...**

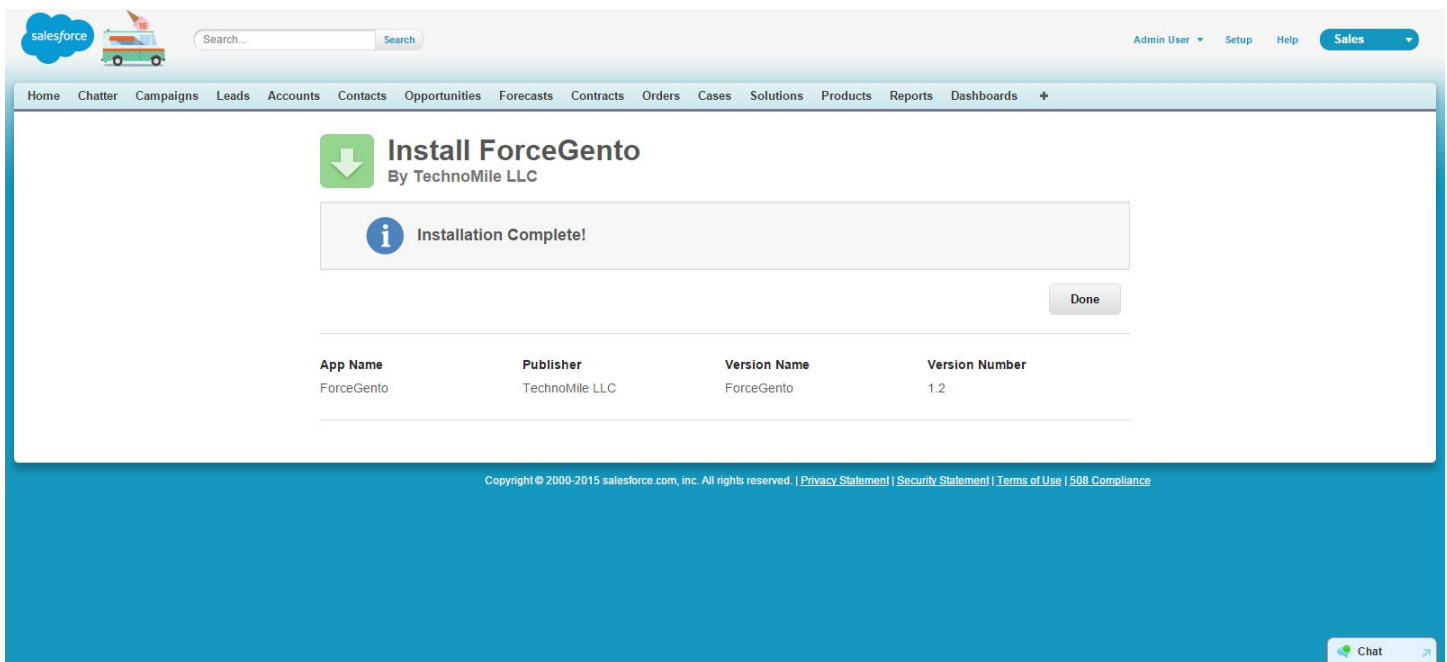
App Name	Publisher	Version Name	Version Number
ForceGento	TechnoMile LLC	ForceGento	1.2

**Additional Details** [View Components](#) [API Access](#)

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6. Installation Completed.





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 **Install ForceGento**  
By TechnoMile LLC

 **Installation Complete!**

**Done**

App Name	Publisher	Version Name	Version Number
ForceGento	TechnoMile LLC	ForceGento	1.2

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7. To view the installed Profile Image Application click on Setup > Build > View Installed Packages.

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Admin User ▾ Setup Help **Sales** ▾

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Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards +

Search All Setup... Expand All | Collapse All

**Salesforce1 Setup**

**Force.com Home**

**Administrator**

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Connect BETA
- Email Administration
- Google Apps
- Data.com Administration

**Build**

- Customize
- Create
- Develop
  - Schema Builder
  - Lightning App Builder New!
  - Canvas App Previewer

**Installed Packages**

AppExchange Marketplace  
Critical Updates

**Deploy**

- Deployment Settings
- Deployment Status

**Monitor**

- System Overview
- Imports
- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- API Usage Notifications
- Mass Emails
- Email Snapshots
- Jobs
- Logs

## Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment! [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects
Uninstall	<a href="#">ForceGento</a>	TechnoMile LLC	1.2	ForceGento	8/14/2015 1:08 AM	✓	1	3	3

**Uninstalled Packages**

No uninstalled package data archives

[appexchange](#)  
[Visit AppExchange »](#)

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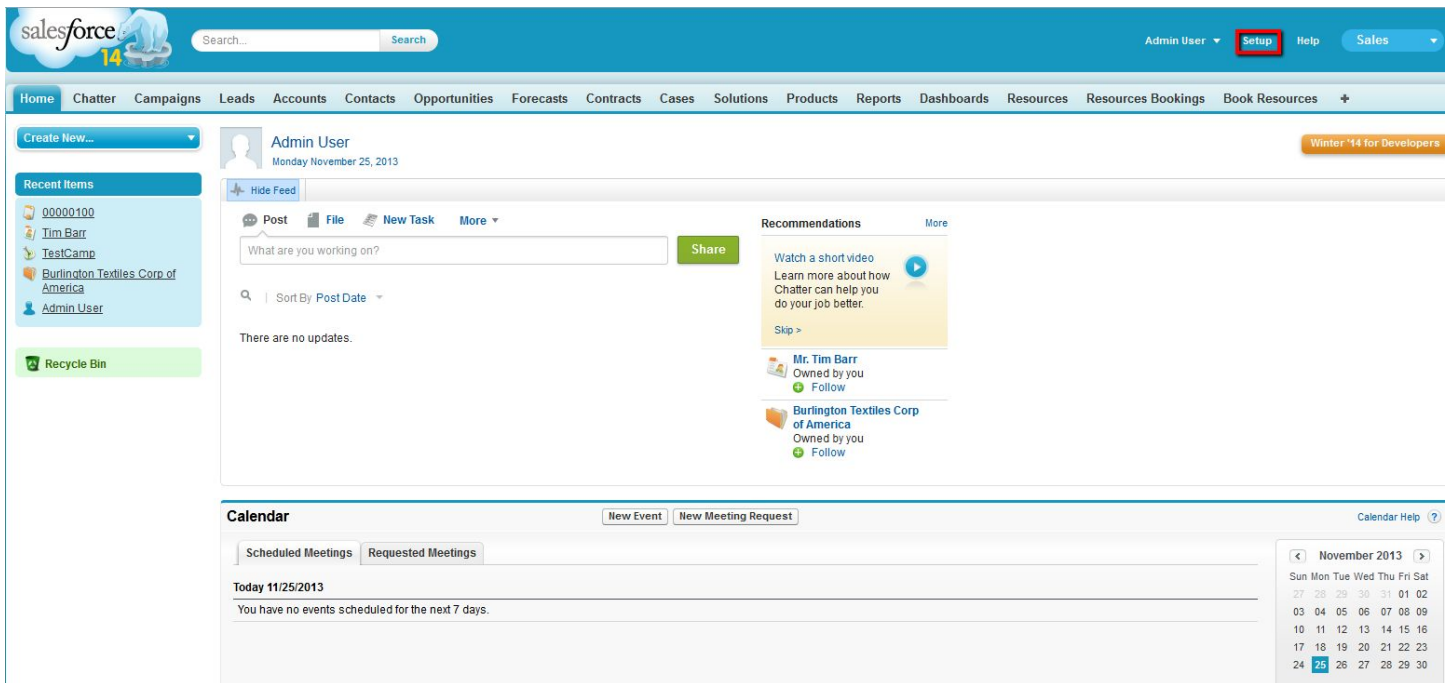
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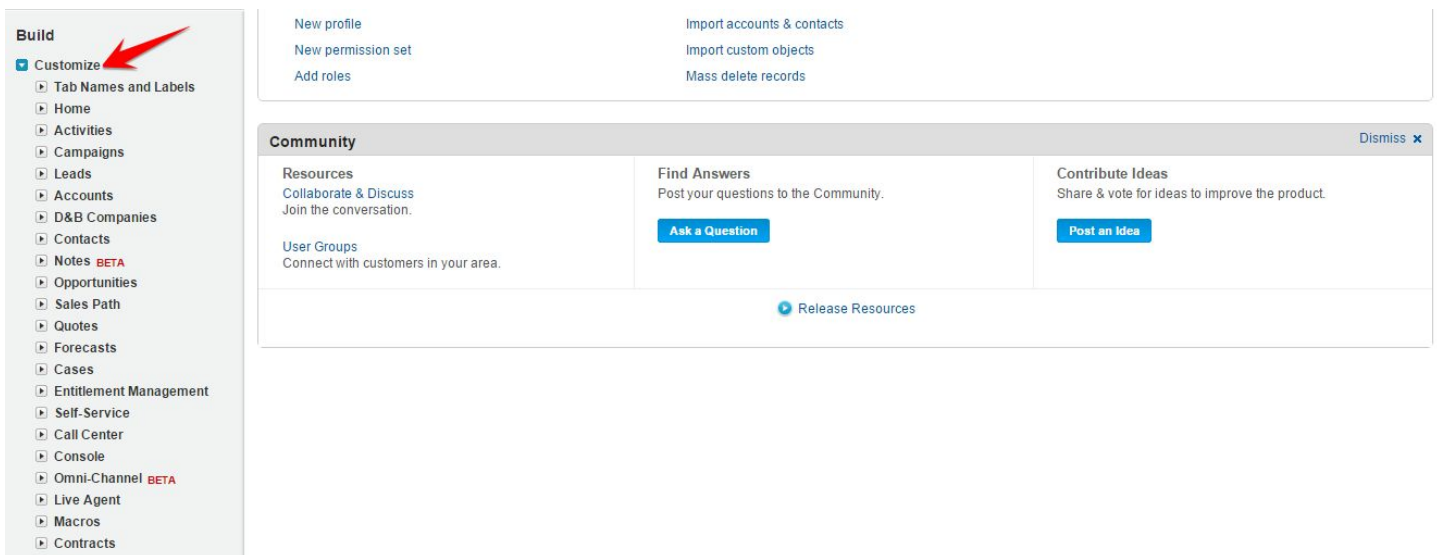
## Part II

Please complete the following steps to finish the configuration of the application.

1. Click on “Setup” in the upper right-hand corner of your browser.



2. Click on the down arrow next to “Customize”.



- Click on the down arrow next to "Account" to expose the "Fields" menu then click on "Type" field for adding additional pick list values.

## Step 1

**Customize**

- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Accounts**

**Fields**

- Related Lookup Filters
- Validation Rules
- Triggers
- Partner Roles
- Contact Roles
- Page Layouts
- Field Sets
- Compact Layouts
- Search Layouts
- Buttons, Links, and Actions
- Record Types
- Limits
- Account Teams
- Settings

Field	Type
Fax	Fax
Industry	Picklist
Last Modified By	Lookup(User)
NAICS Code	Text(8)
NAICS Description	Text(120)
Ownership	Picklist
Parent Account	Hierarchy
Phone	Phone
Rating	Picklist
Shipping Address	Address
SIC Code	Text(20)
SIC Description	Text(80)
Ticker Symbol	Content(20)
Tradestyle	Text(255)
Type	Picklist
Website	URL(255)
Year Started	Text(4)

**Account Custom Fields & Relationships**

New Field Dependencies

## Step 2

Account Type Picklist Values					Account Type Picklist Values Help ?	
					New Reorder Replace Printable View Chart Colors	
Action	Values	Default	Chart Colors	Modified By		
Edit   Del	Prospect	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Customer - Direct	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Customer - Channel	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Channel Partner / Reseller	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Installation Partner	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Technology Partner	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		
Edit   Del	Other	<input type="checkbox"/>	Assigned dynamically	Admin User, 8/13/2015 11:36 PM		

## Step 3

### Add Picklist Values Account Type

Add one or more picklist values below. Each value should be on its own line.

Registered - Ecommerce  
Customer - Ecommerce

Save Cancel



- Click on the down arrow next to "Opportunity" to expose the "Fields" menu then click on "Stage" field for adding additional pick list value 'Wishlist'.

## Step 1

Opportunity Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Current Generator(s)	CurrentGenerators__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del   Replace	Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist			Admin User, 8/13/2015 11:36 PM
Edit   Del	Main Competitor(s)	MainCompetitors__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Order Number	OrderNumber__c	Text(8)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Tracking Number	TrackingNumber__c	Text(12)			Admin User, 8/13/2015 11:36 PM

## Step 2

Opportunity Custom Fields & Relationships

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Current Generator(s)	CurrentGenerators__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del   Replace	Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist			Admin User, 8/13/2015 11:36 PM
Edit   Del	Main Competitor(s)	MainCompetitors__c	Text(100)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Order Number	OrderNumber__c	Text(8)			Admin User, 8/13/2015 11:36 PM
Edit   Del	Tracking Number	TrackingNumber__c	Text(12)			Admin User, 8/13/2015 11:36 PM

## Step 3

### Opportunity Stages

[Help for this Page](#)

Modify or Add the stage to fit your sales process. Note that the Type and Forecast Category values affect each other. The Forecast Category automatically determines how opportunities are tracked in a forecast, but these values can be revised when users update their forecasts.

Changing the Type or Forecast Category will update all opportunities that have this stage value.

Save Save & New Cancel

Stage Name: Wishlist

Type: Open

Description: Wishlist products from Shopping Cart.

Probability: 10%

Forecast Category: Pipeline

Chart Color: Assigned dynamically

Save Save & New Cancel

- Click on the down arrow next to “Product” to expose the “Fields” menu then click on “Family” field for adding additional pick list value ‘simple’.

## Step 1

### Product Fields

[Help for this Page](#)

This page allows you to specify the fields that can appear on the Product page. You can create up to 500 Product custom fields.

Note that deleting a custom field will delete any filters that use the custom field. It may also change the result of Assignment or Escalation Rules that rely on the custom field data.

[Set History Tracking](#)

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
<a href="#">Edit</a>	<a href="#">Active</a>	IsActive	Checkbox			<input type="checkbox"/>
	<a href="#">Created By</a>	CreatedBy	Lookup(User)			<input type="checkbox"/>
	<a href="#">Last Modified By</a>		Lookup(User)			<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Code</a>		Text(255)		✓	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Description</a>		Text Area(4000)			<input type="checkbox"/>
<a href="#">Replace</a>   <a href="#">Edit</a>	<a href="#">Product Family</a>		Picklist			<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Name</a>	Name	Text(255)		✓	<input type="checkbox"/>

**Product Custom Fields & Relationships**

[New](#) [Field Dependencies](#)

No custom fields defined

## Step 2

Product Field

### Product Family

[Back to Product Fields](#)

[Help for this Page](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

**Field Information**

Field Label	Product Family	Field Name	Family
Data Type	Picklist		
Help Text			

**Field Dependencies**

[New](#)

No dependencies defined.

[Field Dependencies Help](#)

**Validation Rules**

[New](#)

No validation rules defined.

[Validation Rules Help](#)

**Product Family Picklist Values**

[New](#)

[Product Family Picklist Values Help](#)

Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>	None	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 8/13/2015 11:36 PM



Step 3

Add Picklist Values

[Help for this Page](#) 

Product Family

Add one or more picklist values below. Each value should be on its own line.

simple

Save Cancel