Salesforce.com CRM Integration

The goal of the Digideck Salesforce CRM integration is to put the full functionality of the Digideck into the hands of your sales team inside the system they already use most. The integration is intended to allow them to easily create presentations from within a Salesforce Opportunity. If you prefer, it can be optionally configured to work from an Account, Contact or Lead.

If you are attaching Products to Opportunities, the presentations can be automatically tailored to the product interests of that deal. This functionality is not available when creating presentations from Accounts, Contacts or Leads.

Any slide in your Master Deck can also be customized to include CRM information dynamically at the time the presentation is created. After each presentation has been shared, analytics will be available to track presentation views directly inside the CRM record.

System Requirements:

- All versions of Salesforce.com are supported

Customer prerequisites:

- CRM Admin
    - A CRM Administrator will be necessary to install and configure a custom Salesforce solution.

How does the integration work?

The process to integrate with Salesforce is not difficult but does require a bit of planning and knowledge of your opportunities.

Sportsdigita Steps:

1. We'll provide an installation package link for your CRM Administrator to install once the customer steps have been completed.

Customer Steps:

It will be beneficial that you consider how your product information presented in the Digideck relates to your product listing in CRM. If you are using the Salesforce Products object, we recommend creating a spreadsheet or other document to plan how your products listed in CRM are associated to slides within the Master Deck. Having a document prepared in advance will make the configuration of your Master Deck go quickly and smoothly.

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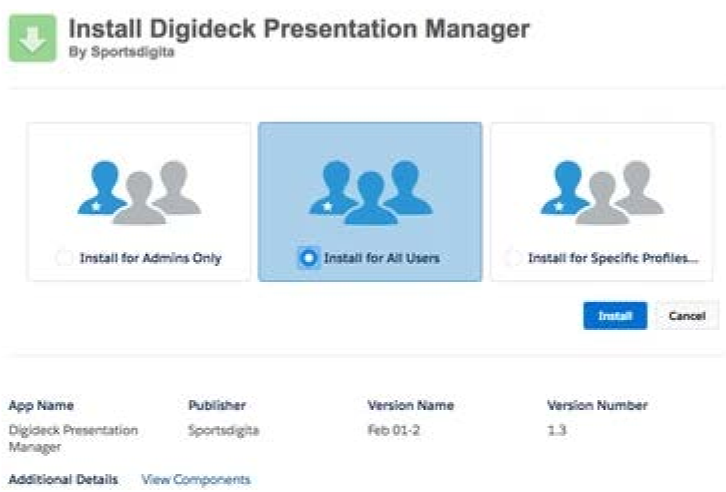
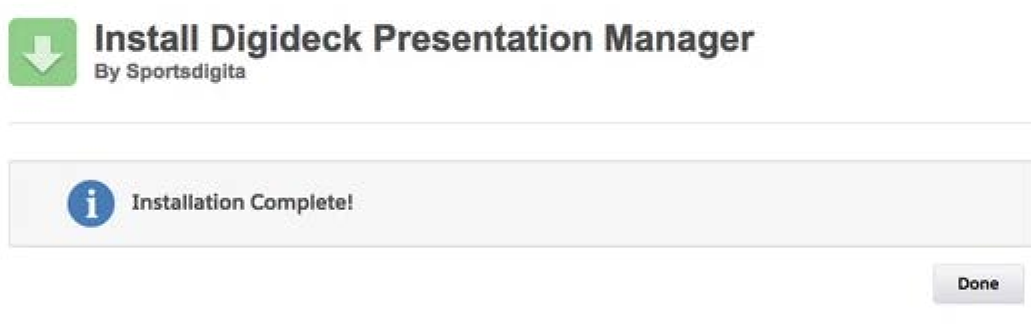
Note: If you are not currently using the Products object in CRM, you can still use the rest of the Digideck integration. The product mapping feature will be available to you at any time if you should decide to add Products to your sales process.

1. **Initiate the standard Salesforce Package install process** using the link provided by your Account Manager.



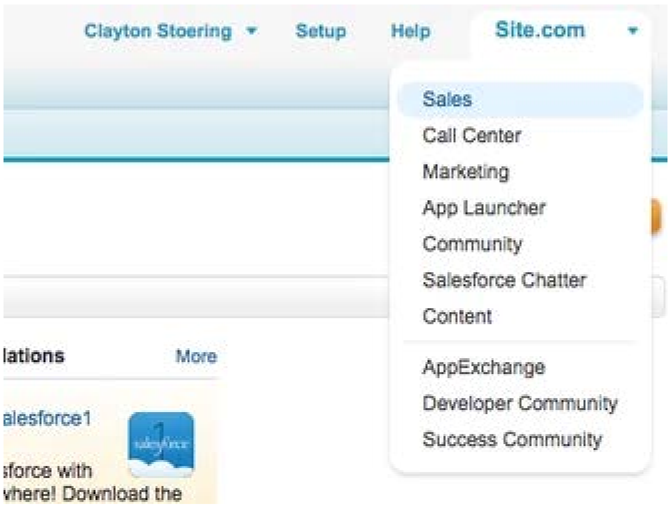
2. **Login** with your Salesforce administrator credentials.



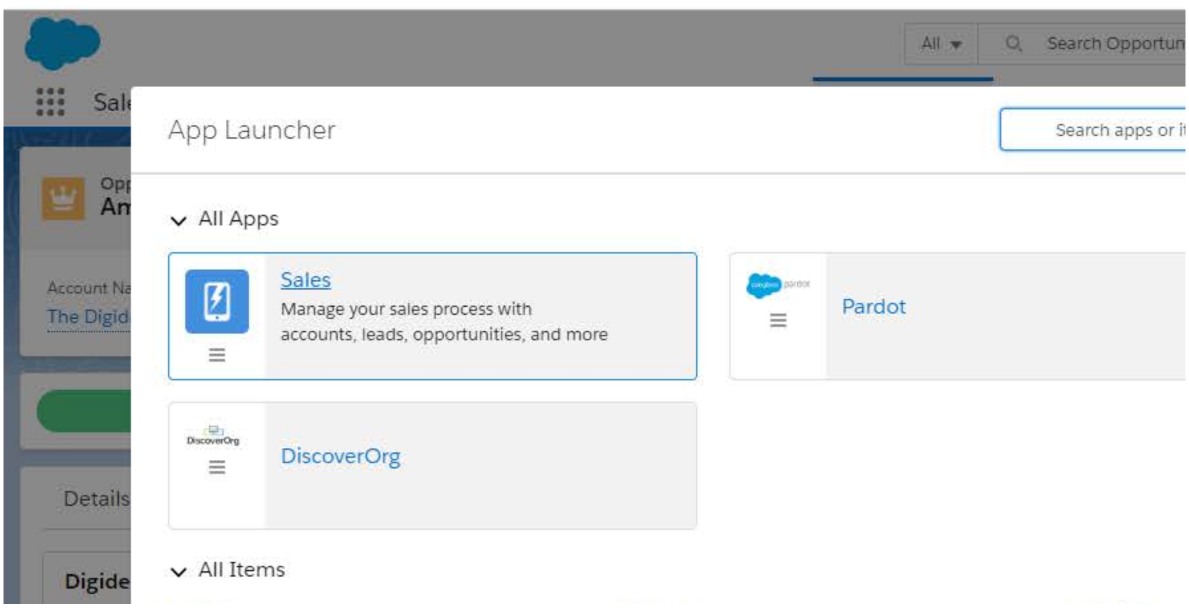
3. Once the solution has been installed, you will need to configure Salesforce.com to view the Presentation Manager screens. The following examples show the steps in both the Salesforce Classic and Lightning interfaces.

4. Begin by **selecting the Sales view:**

In Classic:



In Lightning, click the 9 dot icon in the top left, and select the Sales App:



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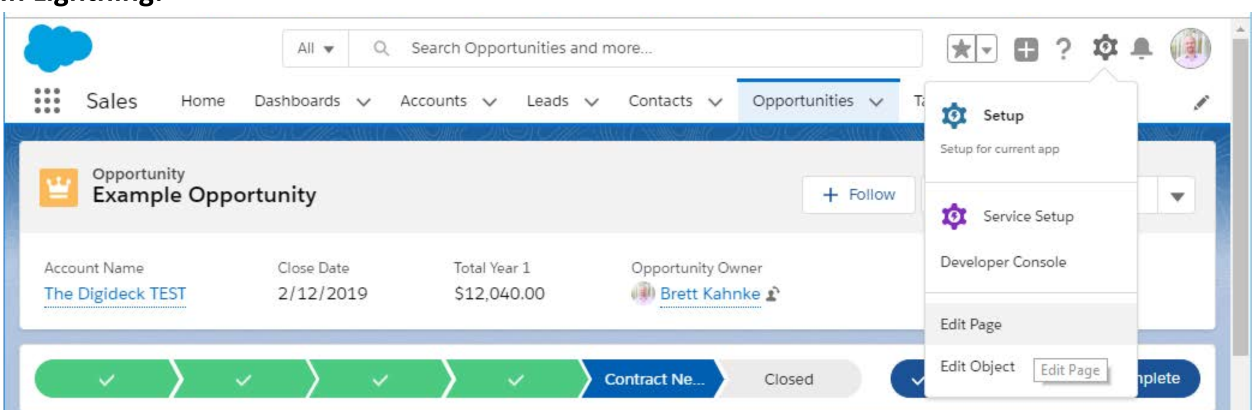
5. The Digideck integration can be associated with either the Opportunity, Account, Contact or Lead object. The Opportunity object is recommended for most clients, because it allows customization of content in the Digideck presentation based on which Products are attached to the Opportunity. If you choose to install the integration on the Account, Contact or Lead object, the steps are similar.

   Edit the Opportunity page layout, either from the Setup menu or by selecting the Opportunity tab and choosing Edit Layout.

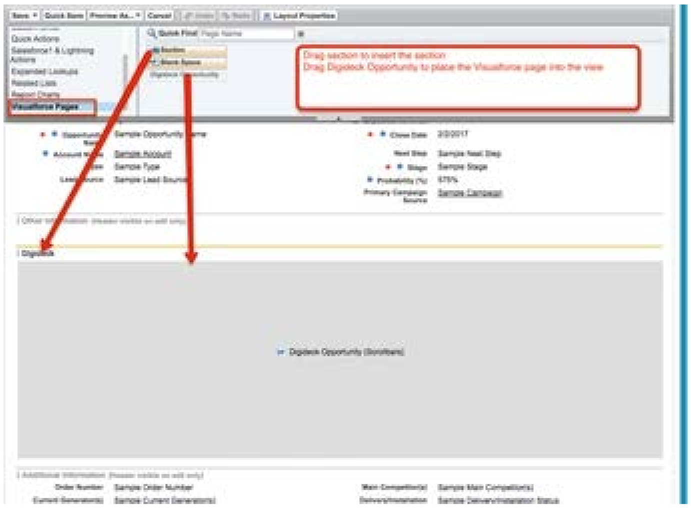
   In Classic:

   In Lightning:

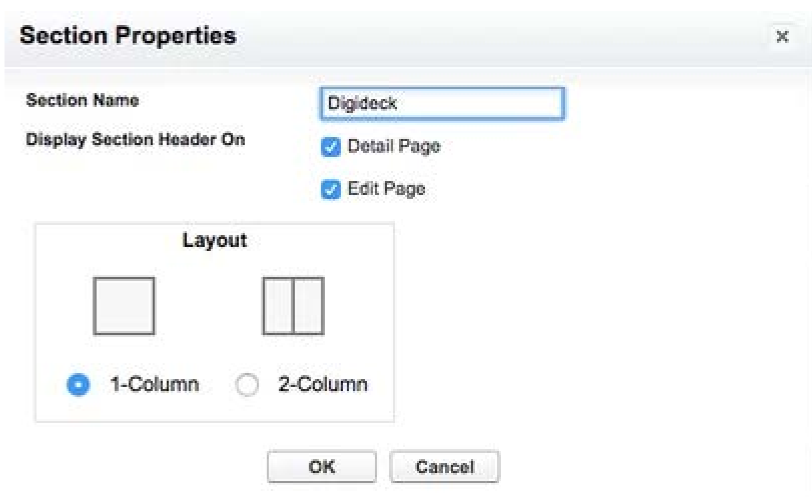


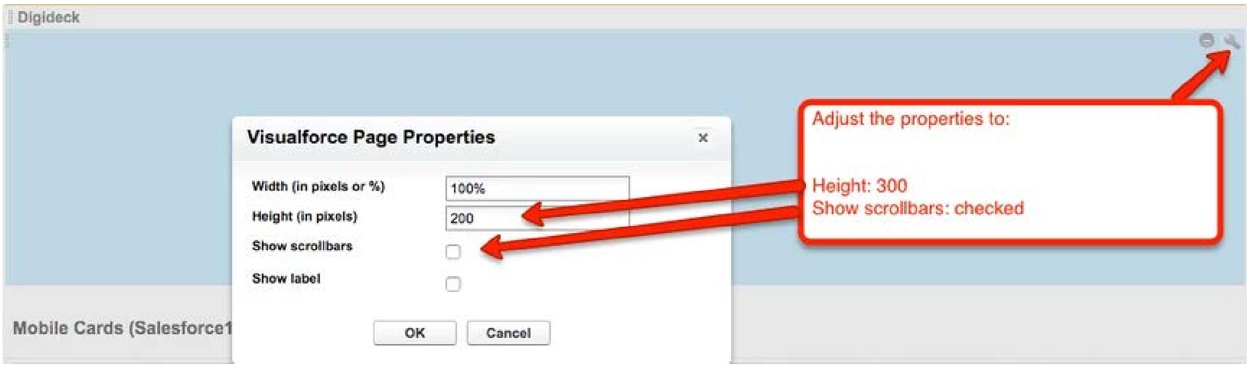
6. **Add the Visualforce page** to the Opportunity page layout that you wish your sales team to use.

In Classic:

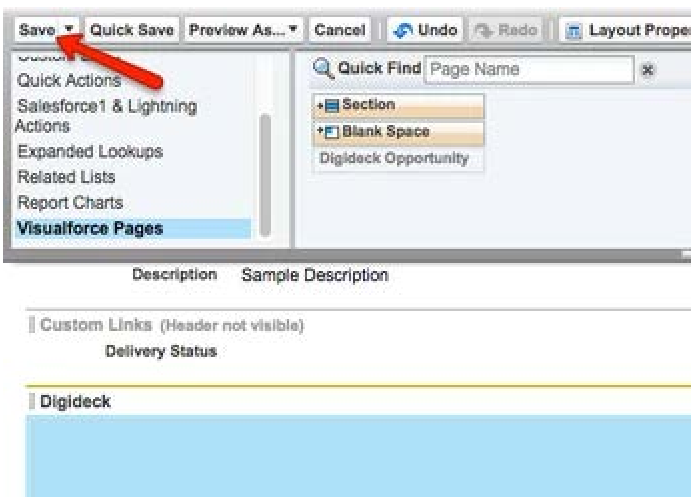


Name the section, **select 1-Column and adjust the properties.**



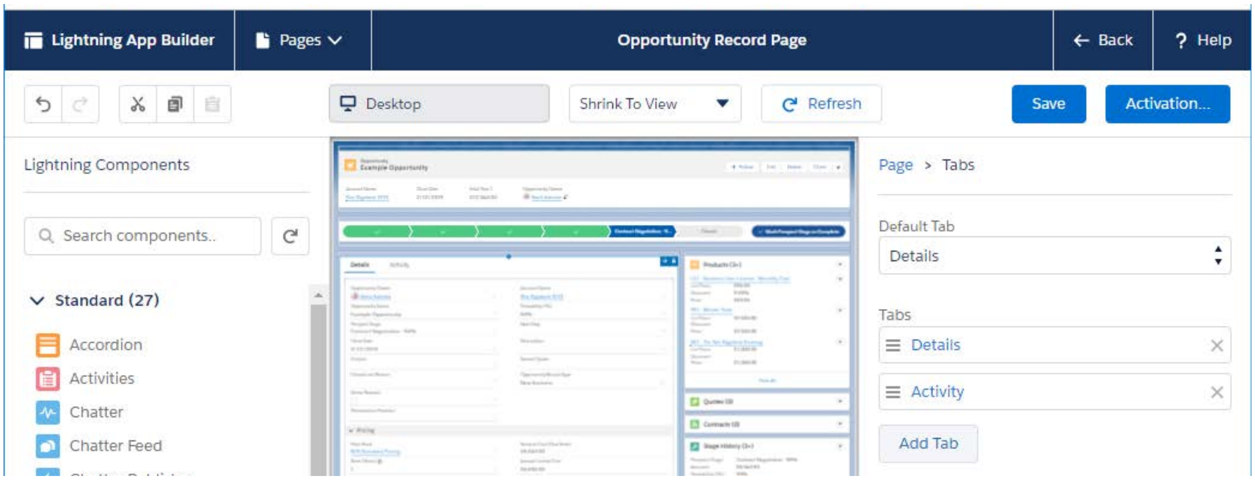


Save your changes.

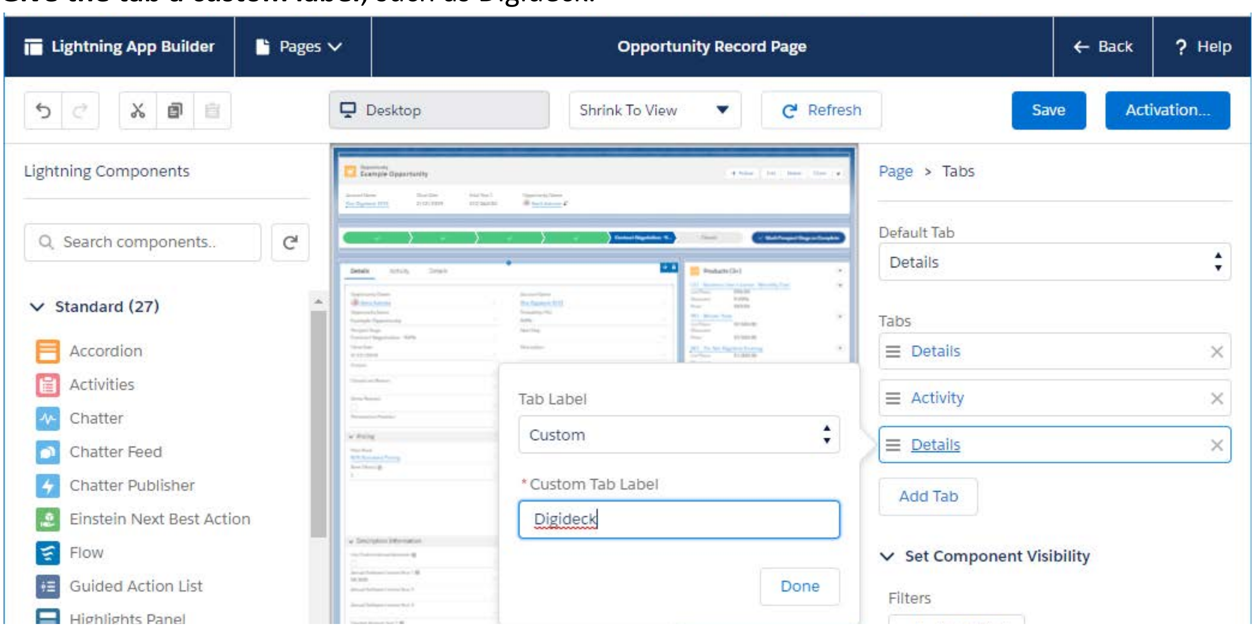


In Lighting:

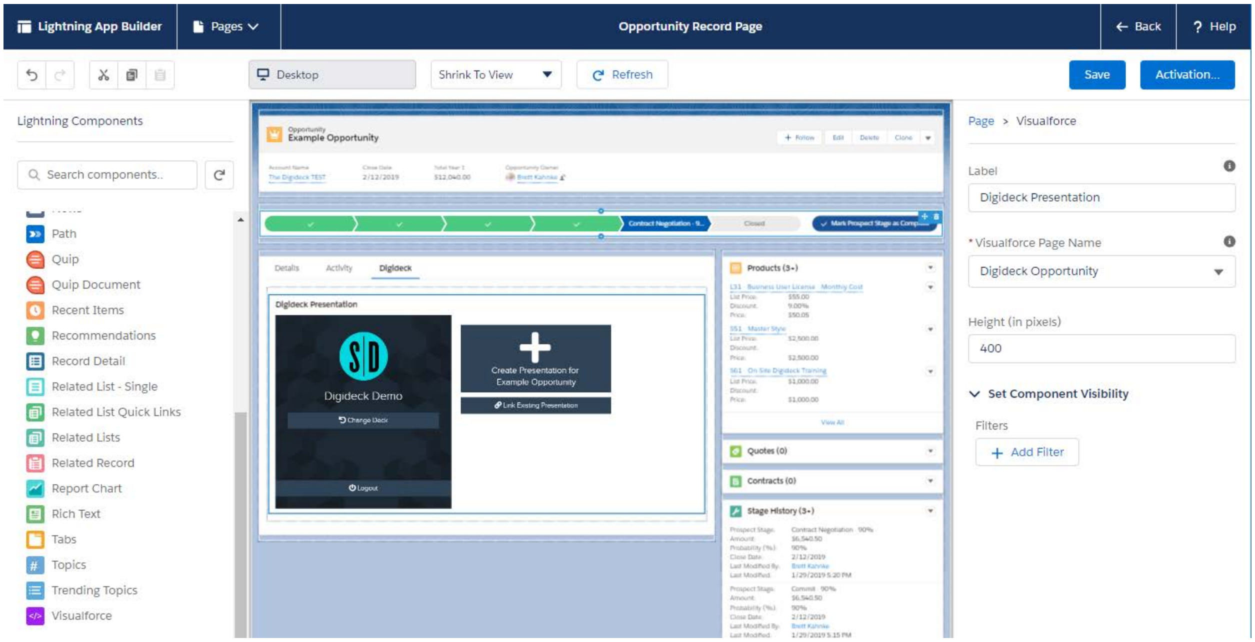
Add a tab to the Opportunity Page.



Give the tab a custom label, such as Digideck.



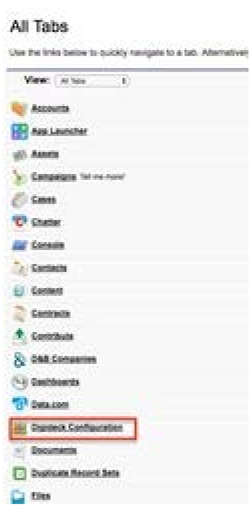
Drag the Visualforce object into the new tab, and edit the details. **Choose Digideck Opportunity as the Visualforce Page Name.** We recommend setting it to be at least 400px high.



Save your changes and return to the Opportunity screen to verify your updates.

7. **Navigate to the Digideck Configuration tab.**

In Classic:



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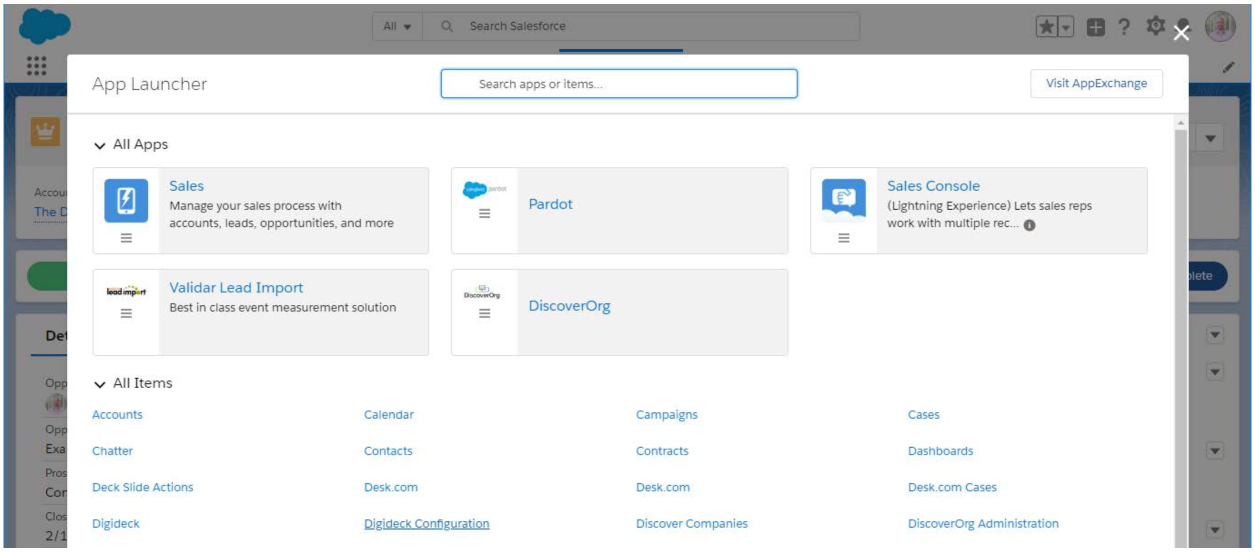
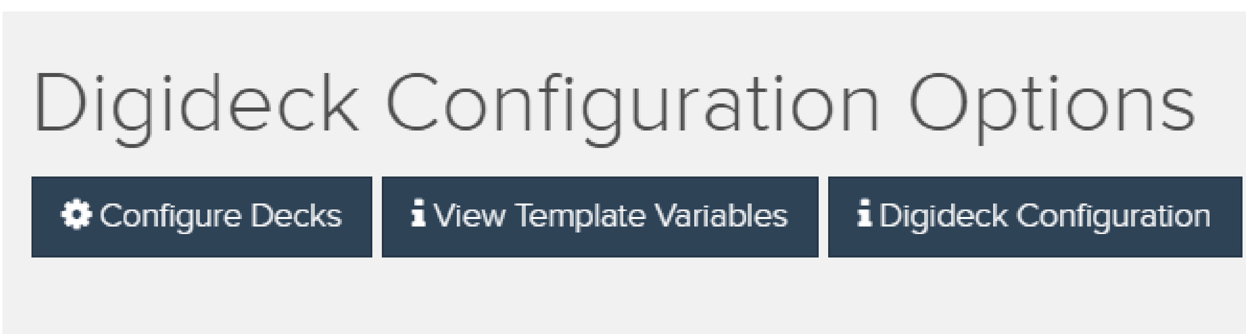
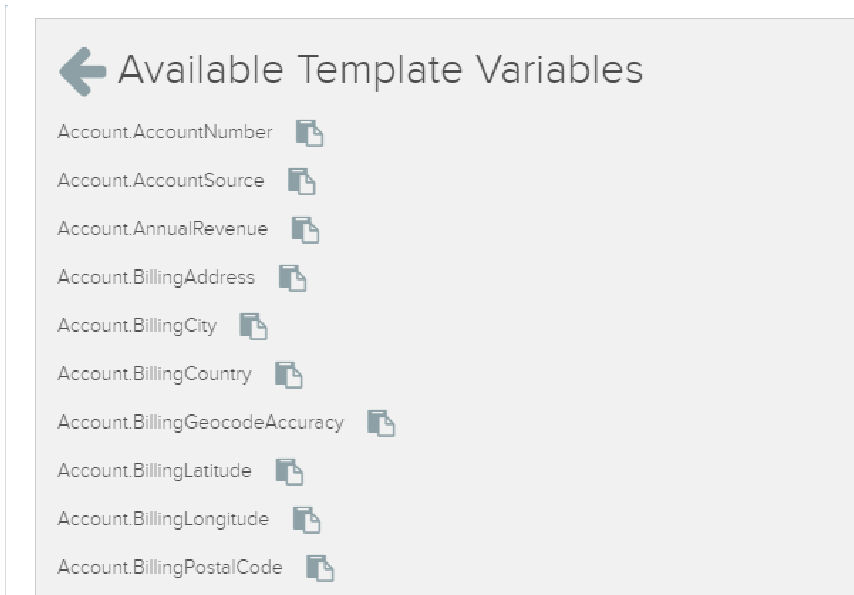
In Lightning:



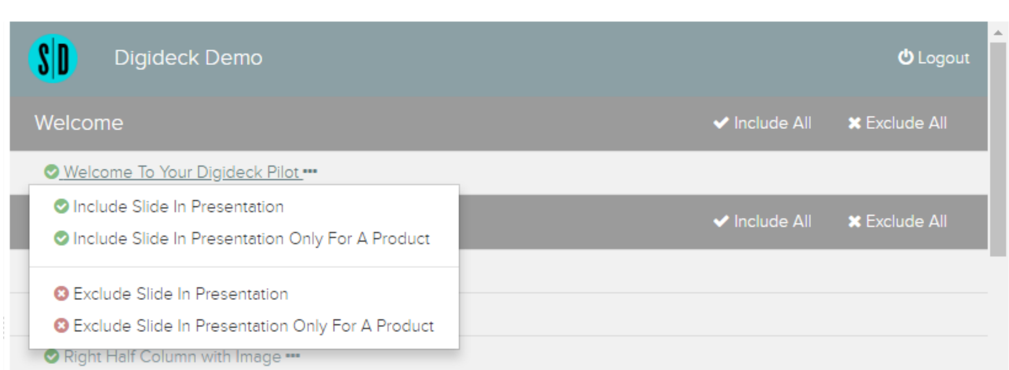
8. **Click on View Template Variables.**



On this page, you will see a listing of all of the available fields that can be merged into your presentation content. To add a variable field to your Master Deck, start by editing the appropriate slide in the Master Deck inside the Digideck platform. Then, return to this View Template Variables page, click the Copy to Clipboard icon next to the field you wish to add and paste it into the content of your slide wherever you want that information to appear. Whenever a presentation is created, that variable will be replaced by the appropriate data from the CRM field for that record.

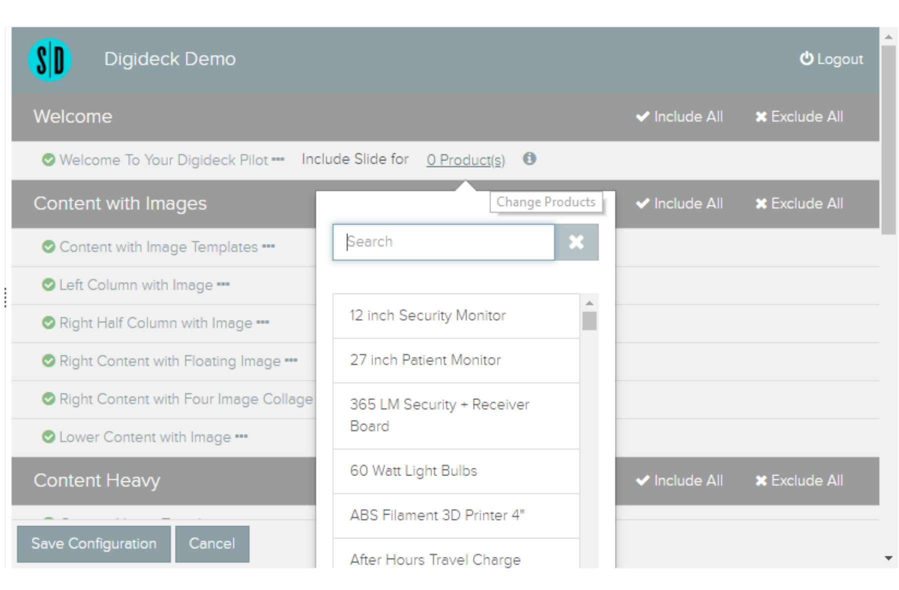


9. **Return to the Digideck Configuration Options page** and **click on Configure Decks**. Here you will be asked to select your Master Deck, and will then be taken to a listing of your available slides.



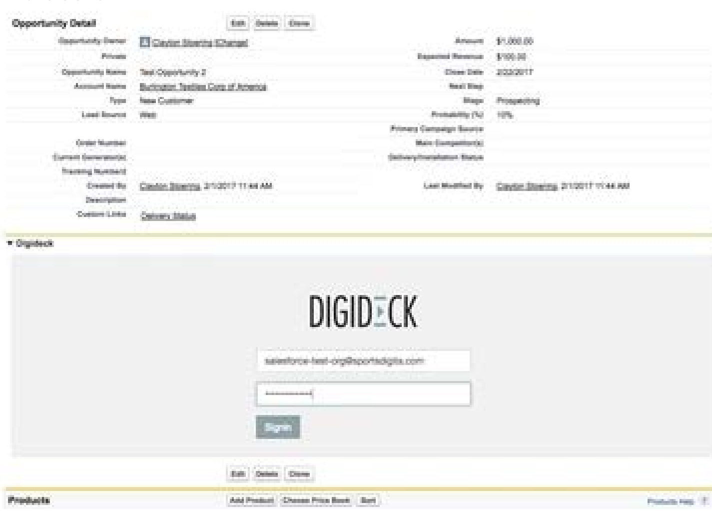
From this screen, you will be able to match up individual slides (or whole chapters) from your Master Deck to your Salesforce Product List. All slides default to the value "Include Slide in Presentation." You can also exclude a slide from all presentations, or selectively include or exclude based on products. To have a slide appear only when a specific product (or multiple products) are attached to the opportunity, **click on the name of the Slide, then choose "Include Slide in Presentation Only For A Product."**

You will now see Include Slide for 0 Product(s). **Click on 0 Product(s)** to bring up a list of products in your CRM system. You can click to select multiple products. When you have completed adding products, be sure to **click the Save Configuration button** to keep your changes.

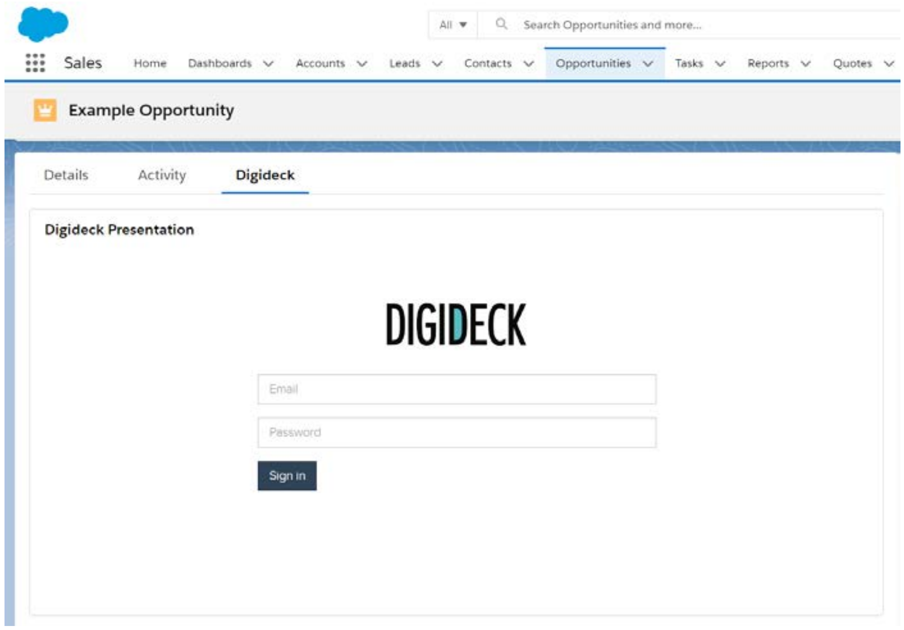


10. Now you are ready to log into the Sportsdigita Presentation Manager from within an Opportunity.

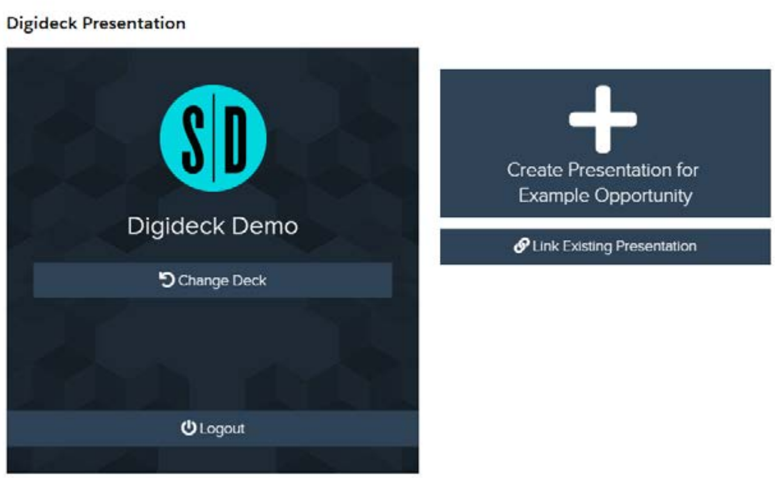
In Classic:



In Lightning:



11. Within the Standard Opportunity page, the Digideck Section will now populate. When the presentation is being created, it can merge data from the Account, Opportunity, Product and User records. Initially, users will see the Create Presentation interface.



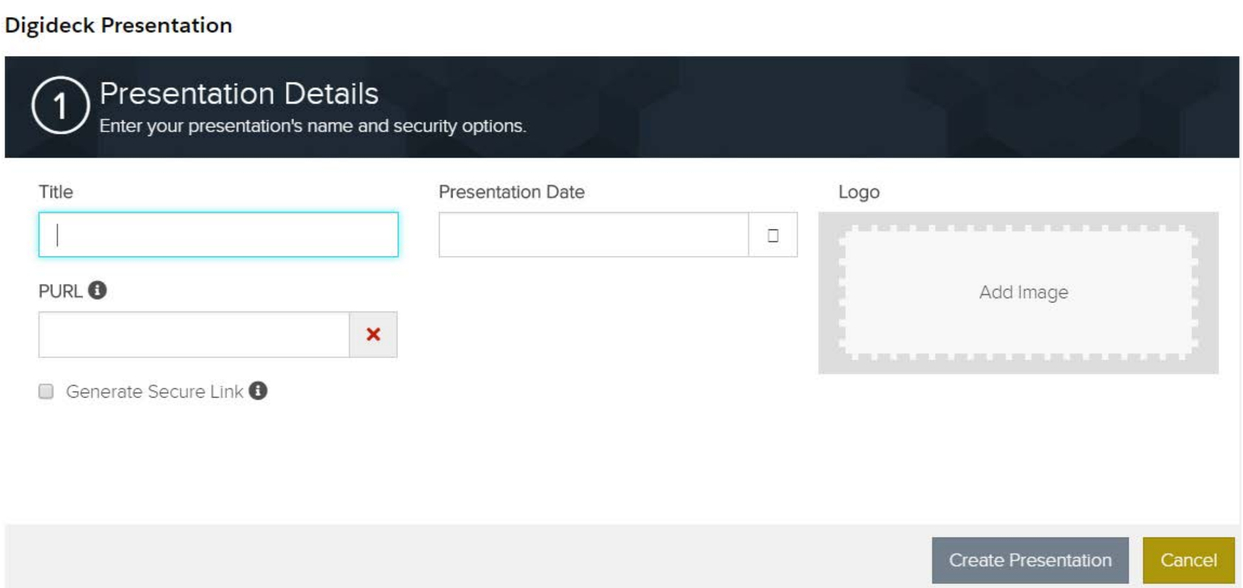
Notes:

a. You can only be linked to 1 presentation at a time.

b. Normal operation would be to create a presentation for this opportunity. This is a 1-time operation, so if you make changes to the opportunity or products you would have to Unlink the presentation and create it again if you want to get the updated information into the new presentation. This allows the user to make changes to the presentation after it is generated and the salesforce integration will not overwrite those changes.

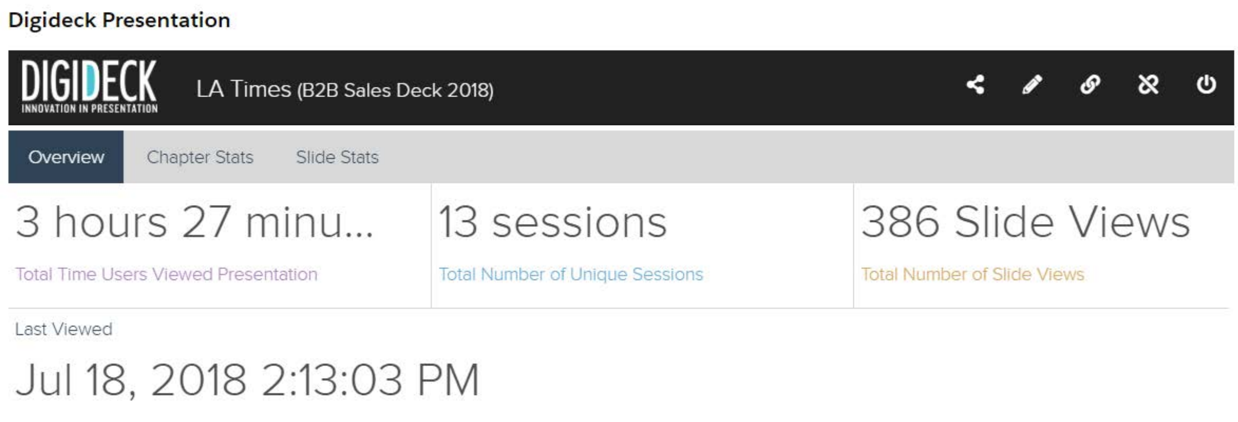
c. There may be times that you want to link to an existing presentation. Select Link Existing Presentation to choose from any existing presentation inside the related Master Deck on your Digideck platform.

12. When you select the Create Presentation button, you will have the opportunity to enter a presentation Title, choose whether the presentation will be publicly viewable, and add a logo image to be included in any hotspots that have been configured in your Master Deck. *Note: The presentation title must be unique for the presentation to be created.*



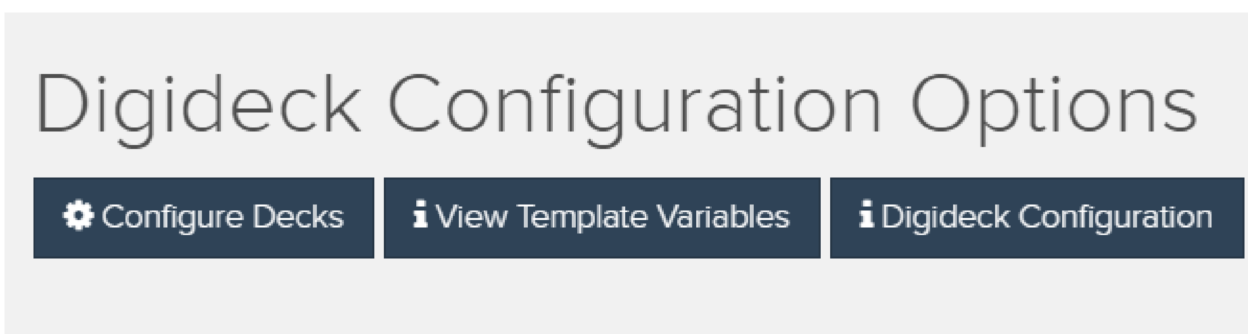
13. The Digideck CRM integration supports the use of Digideck Presentation Flows. Building Presentation Flows is beyond the scope of this document. However, you should be aware that if you choose to implement this feature, you will have the opportunity to choose which Presentation Flows are active within CRM, and those options will be presented to the user once they have completed the screen above.

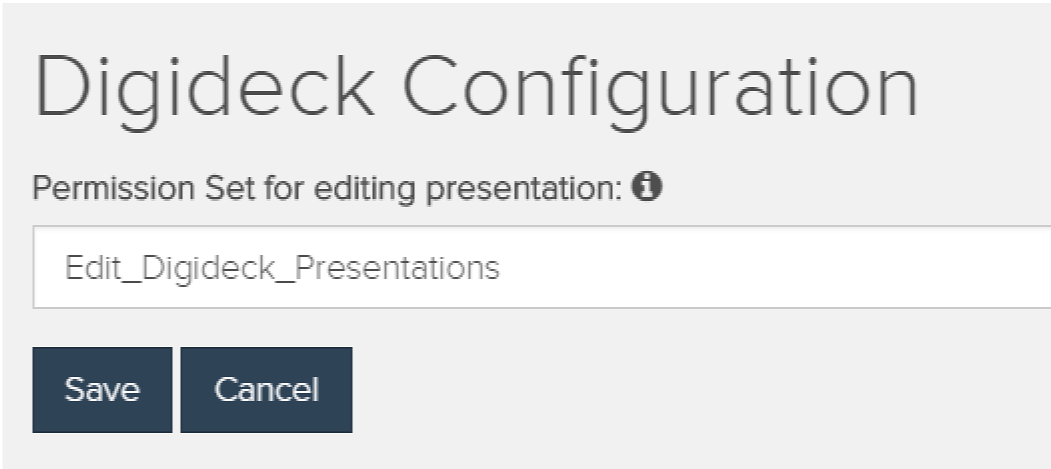
14. Once the presentation has been created, you will see the presentation information interface. The interface includes icons at the top right that allow the user to create and manage share links, edit the presentation, view the presentation, unlink the presentation from the Opportunity, or log out.



Once you have shared a link and received your first external presentation view, analytics will begin appearing. There are three tabs available, offering the Overview, Chapter Stats and Slide Stats.

15. You will have the option of restricting access to the Edit icon if you do not want your users to have access to the Digideck Editing Screens through CRM. To restrict the Edit icon, **return to the Digideck Configuration screen**, and **select the Digideck Configuration button**.





In the text box, **enter the API Name of any existing Permission Set** in your organization. The Edit button will now be visible only to members of that Permission Set. There is no change required to the settings of the Permission Set itself.