Catchlight

INSTALLATION & CONFIGURATION GUIDE

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Release Notes V1 (July 24 2023)

- Inbound will give you an error message for any contacts that failed to sync
- Adding Status field on Catchlight Profile object (Enrichment Status: Completed, Insufficient Data, In Progress, Prohibited, Failed)
    - On package upgrade, you will need to add the Enrichment Status field onto the Catchlight Profile page layout
- Sync Errors field on Catch Profile Object (Sync errors value with semi colon)
    - On package upgrade, you will need to add the Sync Errors field onto the Catchlight Profile page layout
- If one record fails it should not fail the whole batch job

Release Notes V2 (Oct 24 2024)

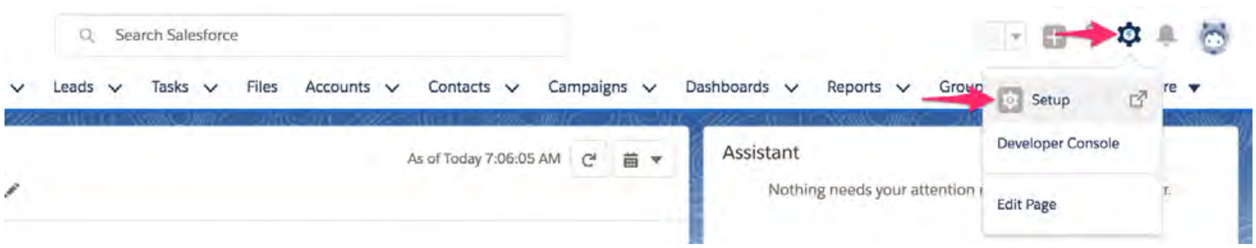
- System Connections Update: Added and Inbound Authentication Step to facilitate the new webservice
- Data Enrichment Flows: Added packaged flows to replace Outbound portion of the recurring batch job sync
- Catchlight Profile webservice: Added a webservice that Catchlight can use to update data-enriched Catchlight Profiles as a replacement for the Inbound portion of the recurring batch sync
- Data Mapping Update: Added a new Inbound Data Mapping record to facilitate any new changes to the Catchlight Profile schema
- Data Mapping Update: Added a new packaged Person Account Default Mapping for any org that has Person Accounts enabled
- Quality of Life Update: Batch Job is now a one-time run, removing the recurring functionality
- Quality of Life Update: Batch Job now sends the unique salesforce IDs of records during the Outbound Sync
- Quality of Life Update: Catchlight Profile Object is now set to allow reporting post-install
- Quality of Life Update: Catchlight Score is now rounded to the nearest integer instead of a decimal
- Quality of Life Update: Added a new informational section to the Catchlight Setup app, with information pertaining to the packaged Sync Flows
- Quality of Life Update: Added new Flow to facilitate the Lead-to-Client conversion directly from the Catchlight Profile Object
- Quality of Life Update: Added new post-install script to create default Outbound Mappings for Lead and Contact if none are created yet

- Quality of Life Update: Added new 'Lead Source' mapping for all Outbound Mappings

Introduction

This document serves as a configuration guide for the **Catchlight** Salesforce app. The first section covers the installation of the package. The following sections will walk you through applying permission sets and completing the Setup Assistant. This guide is meant to walk you through configuring your org in a Lightning Experience environment.

Throughout this guide, you will be instructed to navigate through Setup. To do so, you will need to click on the gear to the upper right and select Setup. Once in Setup, you may use the Quick Find box to find and navigate to the appropriate section.



Installation

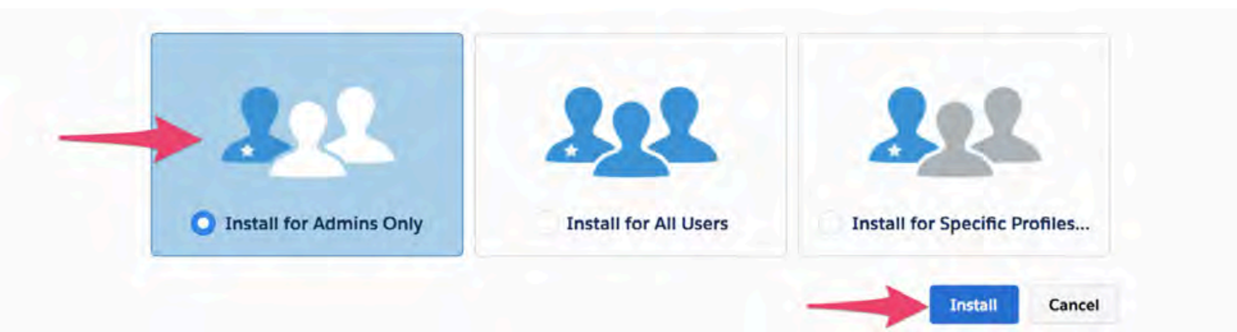
Installing the Catchlight Package

Copy and paste the package install URL into your browser's address bar and click the Enter/Return key on your keyboard (if you do not have the package URL, please contact a **Catchlight** representative to request one).

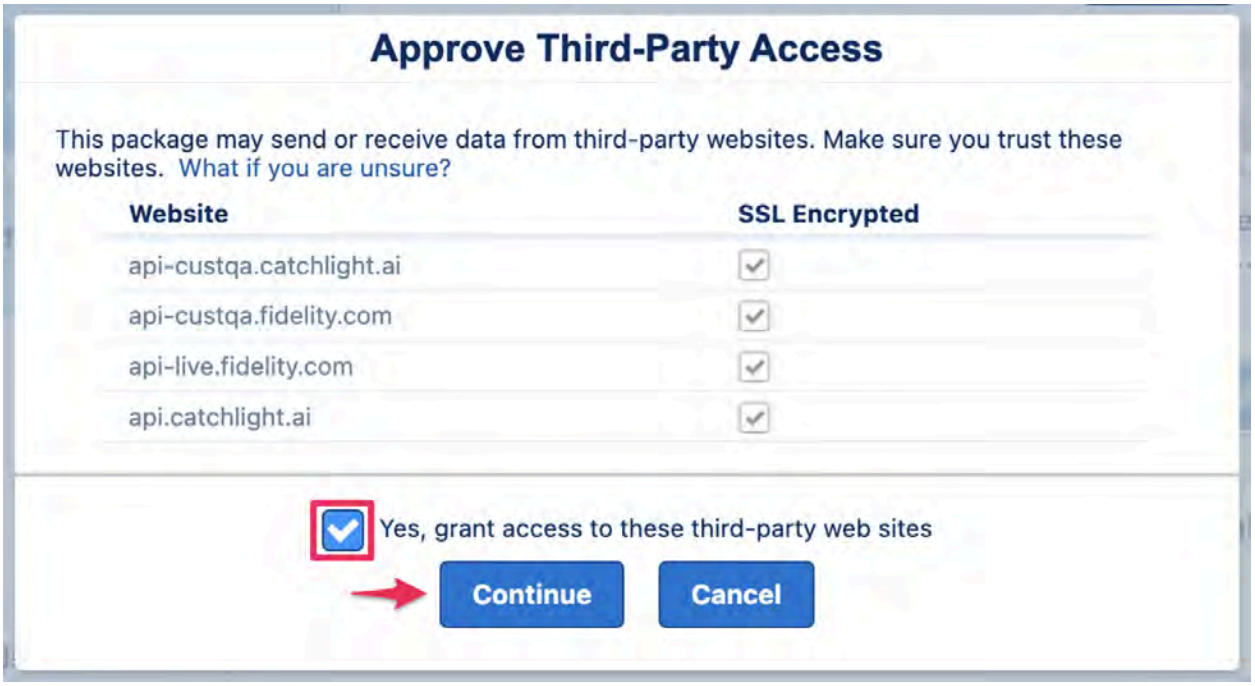
If you are not already logged into the org you wish to install the package into, Salesforce will prompt you to log in.

- **Install for Admins Only** is recommended - this option allows for controlling access and permissions after the package has been installed.

  For further information, [please click here to refer to salesforce documentation on Package Installations]().



- **Approve Third-Party Access** - check off the box and click **Continue** to start the package installation when the modal appears. As it states, this is to allow data to be sent back and forth between your Salesforce org and Catchlight.

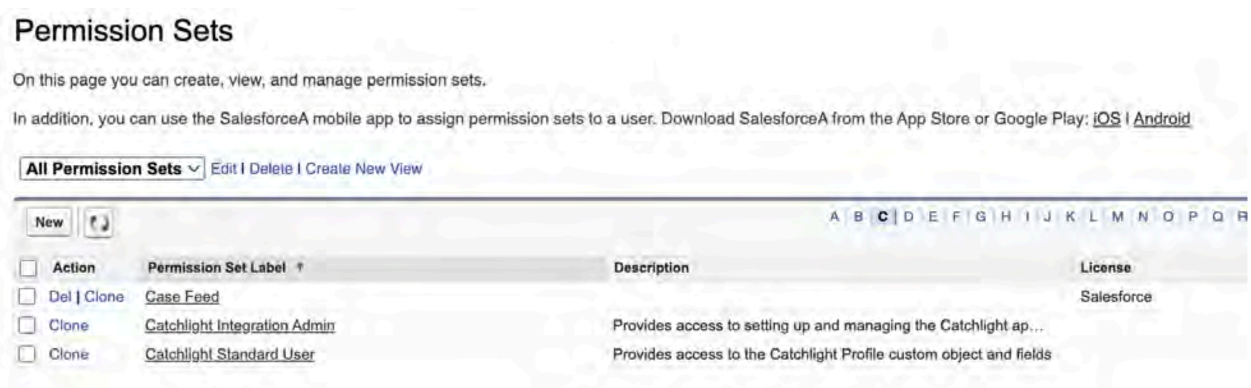

Approve Third-Party Access
This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?
Website
SSL Encrypted
api-custqa.catchlight.ai
api-custqa.fidelity.com
api-live.fidelity.com
api.catchlight.ai
Yes, grant access to these third-party web sites
Continue
Cancel

Catchlight Configuration

Permission Sets

The package includes the following permission sets:

- The **Catchlight Integration Admin** permission set must be assigned to any non-system admin user that will use and configure the Setup Assistant app.
- The **Catchlight Standard User** permission set must be assigned to any non-system admin that will need access to the custom objects and metadata in the app.



Clone Permission Set

Since system permissions are unable to be packaged due to limitations with AppExchange apps, you must add additional permissions manually by cloning the permission set first, in order for users to access setup features. We will be cloning the Catchlight Integration Admin permission set because we want to give access to the record types we created for the Contact object. In an FSC org, there will already be available record types for the Contact and Lead objects so we still need to clone this permission set and assign access to the available record types.

To clone the permission set, navigate to **Setup > User > Permission Sets**:

- Next to the **Catchlight Integration Admin** permission set, click **Clone**.

- Enter a new unique **Label** and **API Name,** then click **Save**.

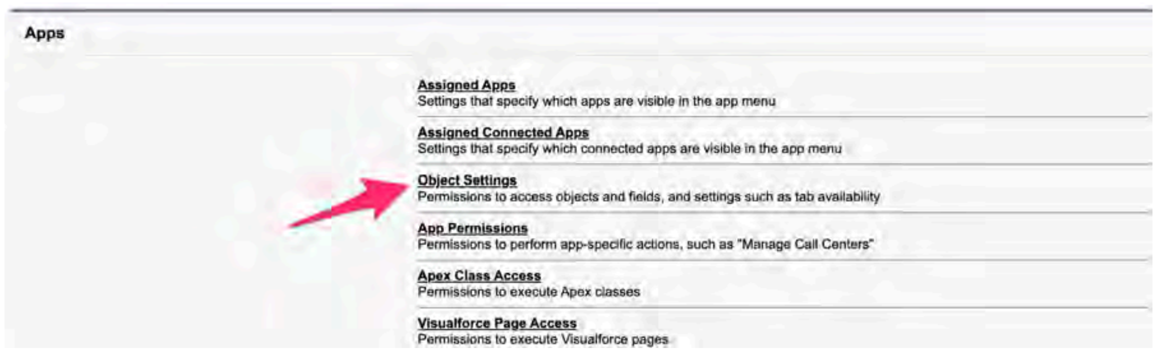
NOTE: We have updated both Permission Sets in V2 to give access to all the new packaged objects, fields, and apex classes. If you are upgrading from V1 and have previously cloned and edited the packaged Permission Sets, it is recommended that you clone these updated Permission Sets and modify them to fit your company's access needs.

Modify Permission Set

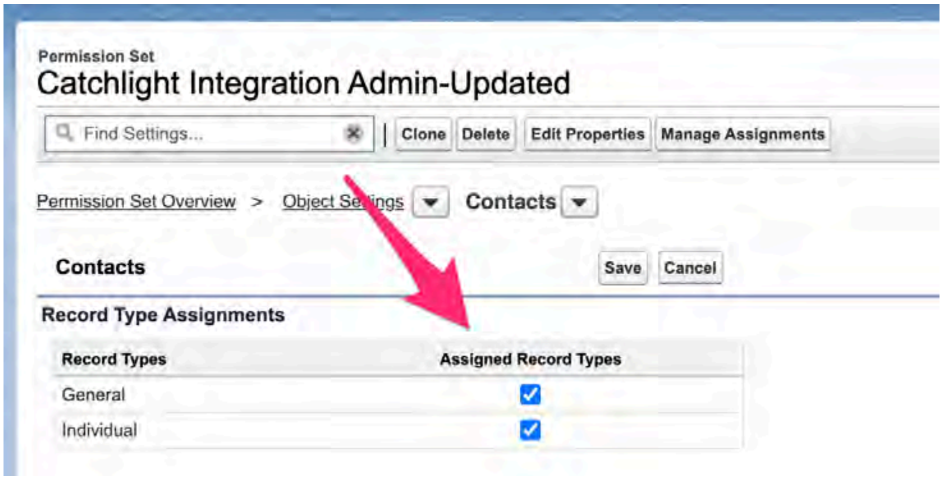
To modify the permission set, navigate to **Setup > User > Permission Sets**:

- Select your cloned permission set.

- Select **Object Settings**.



- Click on **Contact**
- Click **Edit**, then select the following permissions
    - **Contact**
        - Give access to record types by checking the checkboxes
            - General
            - Individual



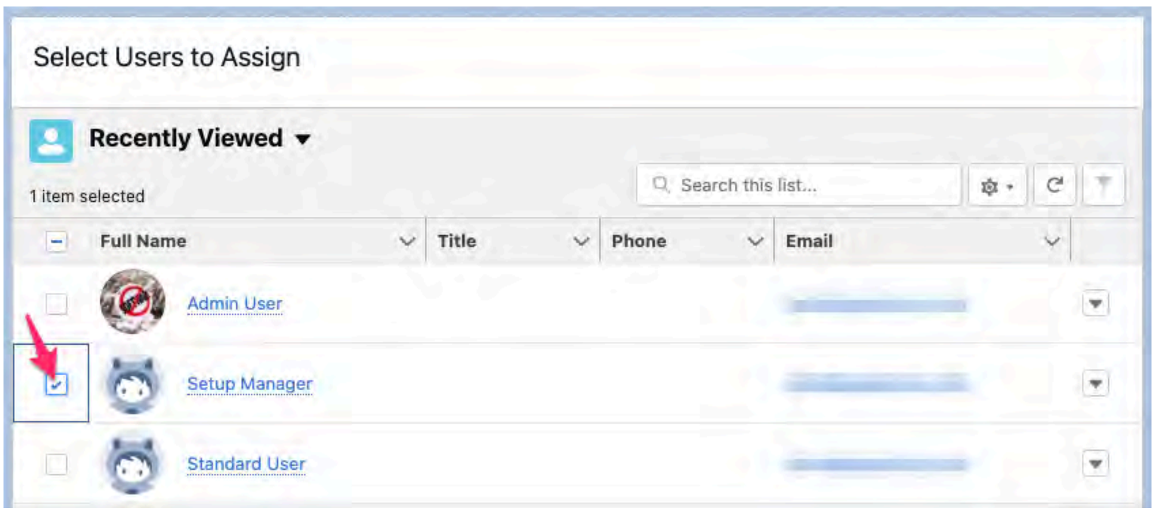
- Click **Save**

Now we've allowed access to record types we've created for the Contact. This allows us to map Contact twice with different record types which will be explained later in this document.

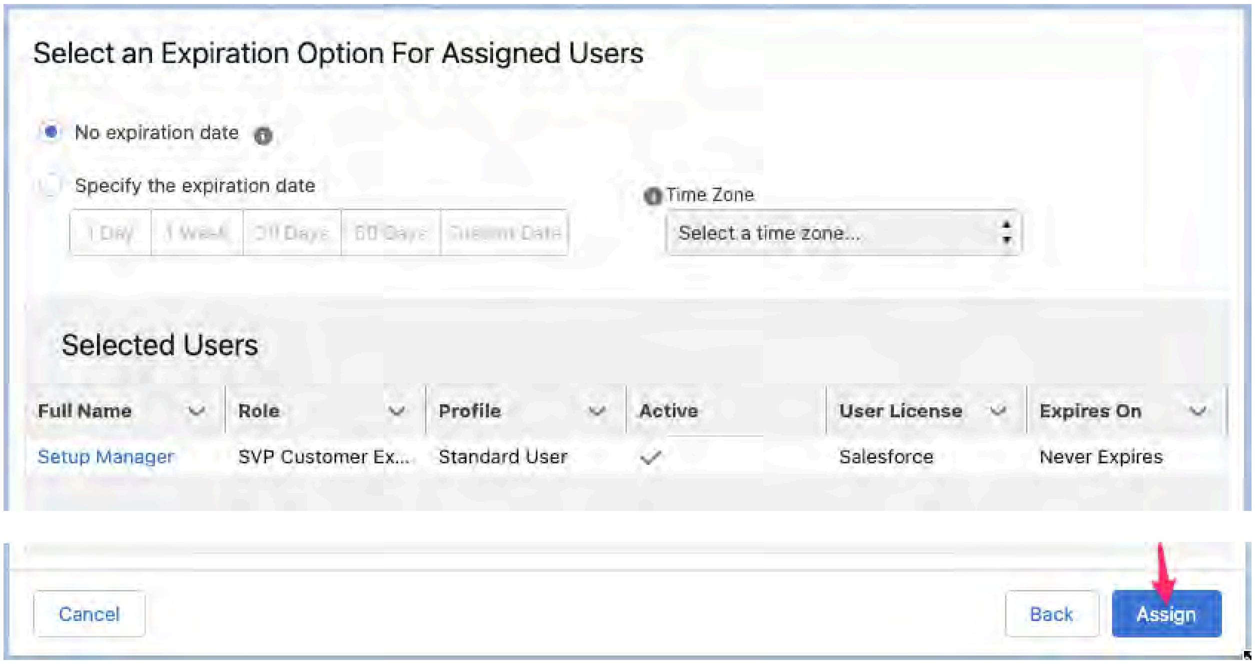
Assign Permission Sets

To assign permission sets to your users, navigate to **Setup > User > Permission Sets**

- Select the **Catchlight Integration Admin** permission set
- From the Permission Set Overview page, click **Manage Assignments**
- Click **Add Assignments**
- Check the box next to the user(s) that you would like to assign the permission set to and click **Next**



- Optionally select any expiration settings for assigned users and click **Assign**



For more information, please refer to Salesforce documentation on Permission Sets.

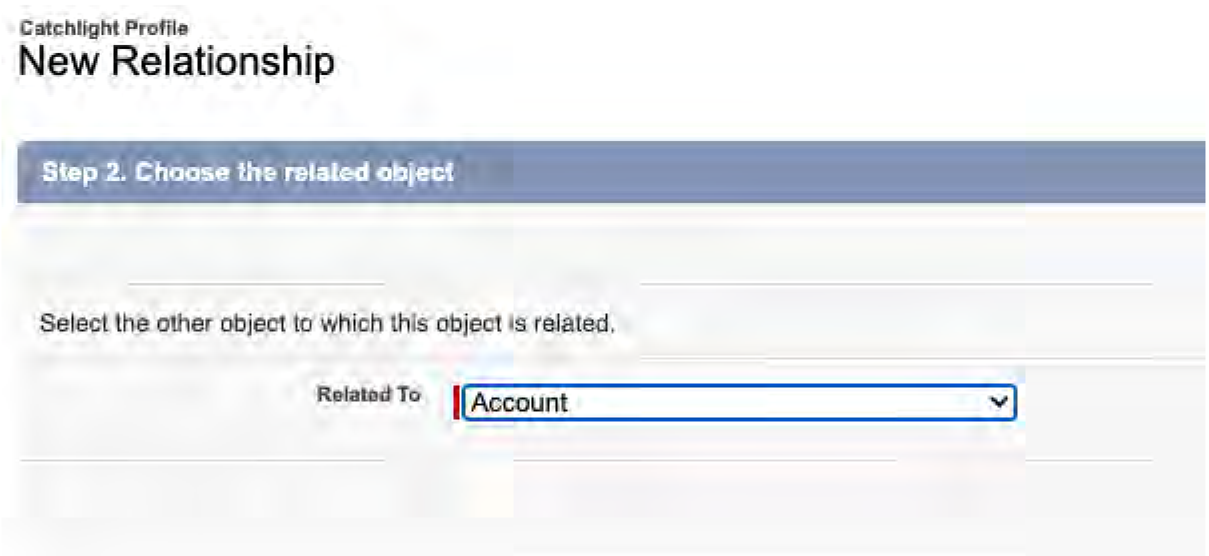
NOTE: There are several Permissions sets that are available in a Financial Services Cloud org that can be assigned to a user to give the user full capabilities of FSC. If the system admin wants to give a user full capabilities, just match all the permission FSC-related permission sets of the system admin and assign it to your user.

Create bi-directional Lookup fields with Catchlight Profile and Standard Salesforce Object or Custom Object

Before we start syncing any data with Catchlight, we first need to establish a 1:1 relationship between Catchlight persons and Salesforce object records. To do this we will need to create relational fields on the two objects. By default, the package will already include Lookups to the Contact and Lead from the Catchlight Profile object so these Lookups do not need to be created. This will be the case for the Contact and Lead objects, which will also have Lookups to the Catchlight Profile object. We can start by creating a Lookup field from the Catchlight Profile Object to an object that you want to map to. In this example, we will be creating a Lookup from Catchlight Profile to the Account object. Navigate to **Setup > Object Manager > Search and select Catchlight Profile > Fields and Relationships > New**

- **Step 1:** Select the Lookup Relationship and then click **Next**
    - For more Salesforce resources on Lookup fields, please see [Object Relationships Overview]

- **Step 2:** Select the object you want the Catchlight Profile object to look up to and then click **Next**



- **Step 3:** Enter a label and name for the lookup field
    - The Field label will be pre-populated and Field Name will be populated by clicking into the field

- Click Next and Establish field-level security for reference field **(Step 4)**
- Click Next to add reference field to Page Layouts **(Step 5)**
    - Catchlight Profile Layout should automatically be checked
- Click Next to add custom related lists **(Step 6)**
- Click Save

The user should be able to see the Lookup field created in the Fields and Relationships navigation section.

NOTE: In this example, to complete the 1:1 relationship we need to create a lookup from the Account object to the Catchlight Profile Object. We can follow the same steps mentioned above but it will be from the Account Object and related to the Catchlight profile object. The bi-directional lookups will enable the user to successfully sync data with Catchlight and utilize the conversion trigger.

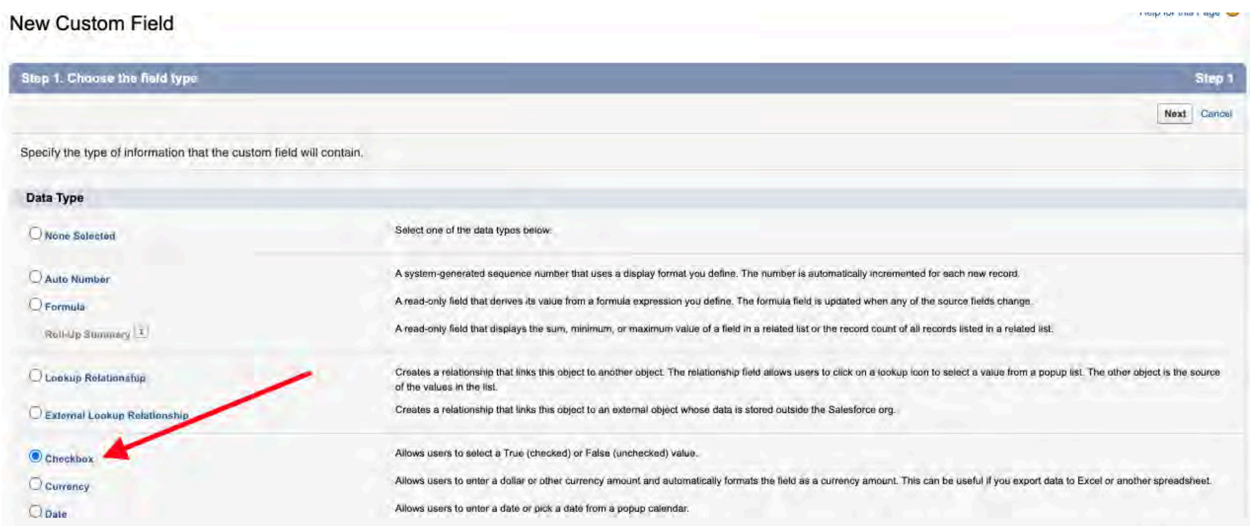
Remember: By default, Contact/Lead objects will already have bi-directional lookups with the Catchlight Profile object. These steps are if the user wants to add Lookups for objects that are not Contact/Lead.

Creating Sync with Catchlight and Last Synced to Catchlight fields and adding it to your Object record page layout

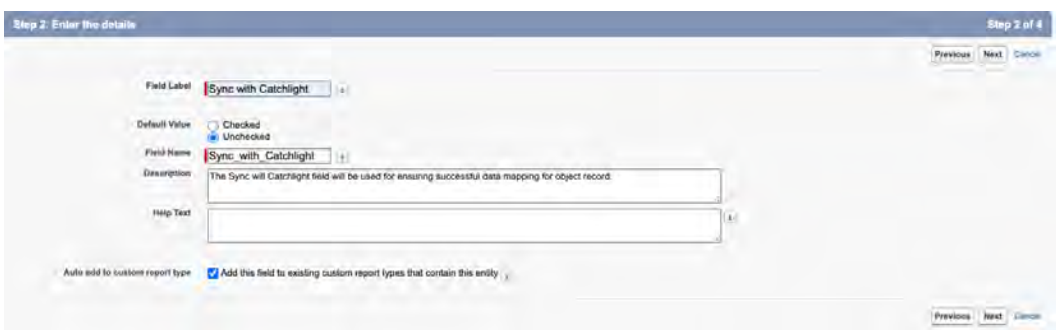
In order for users to successfully sync their person data to Catchlight, they must ensure that the Sync with Catchlight field must be checked on their parent record ie Contact/Lead/Person Account. Additionally, the Last Synced to Catchlight field will determine whether or not a Salesforce record has been synced compared to when it was last modified. The Sync with Catchlight and Last Synced to Catchlight fields will be packaged with the Contact, Lead, and Person Account objects. Even though they are packaged, these fields still need to be added to the Object page layouts! For any other object, the admin must create the Sync with Catchlight and Last Synced to Catchlight fields and assign it to their record page layout. We will go over how to add the Sync with Catchlight field and assign it to your record page layout. Then we will instruct you to repeat the same steps with the Last Synced to Catchlight field.

Navigate to **Setup** > **Object Manager** > In the Quick Find search the object > Click on Object > Select Fields and Relationships > Click New

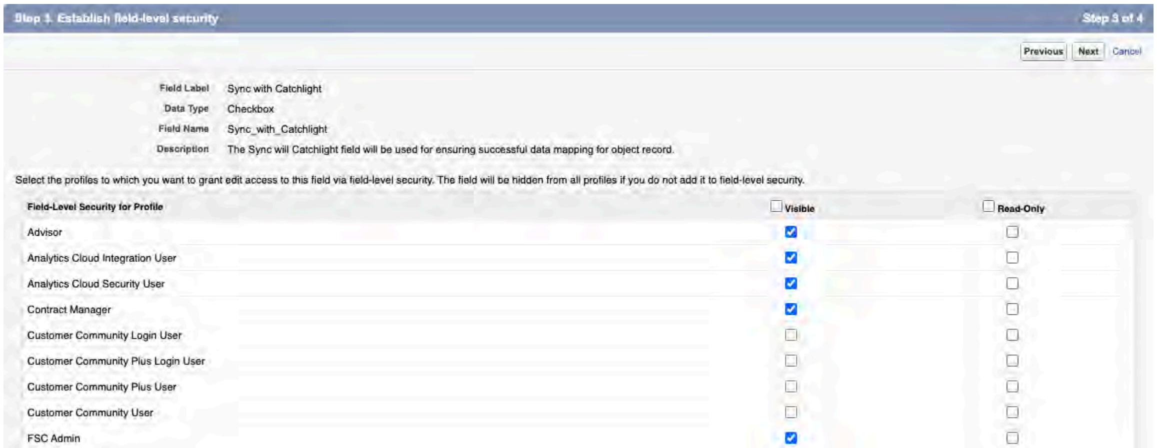
- Select Checkbox for the data type > Click **Next**



- Enter details for the Sync with Catchlight field > Click **Next**
  - Field Name will be auto-populated after entering a Field Label



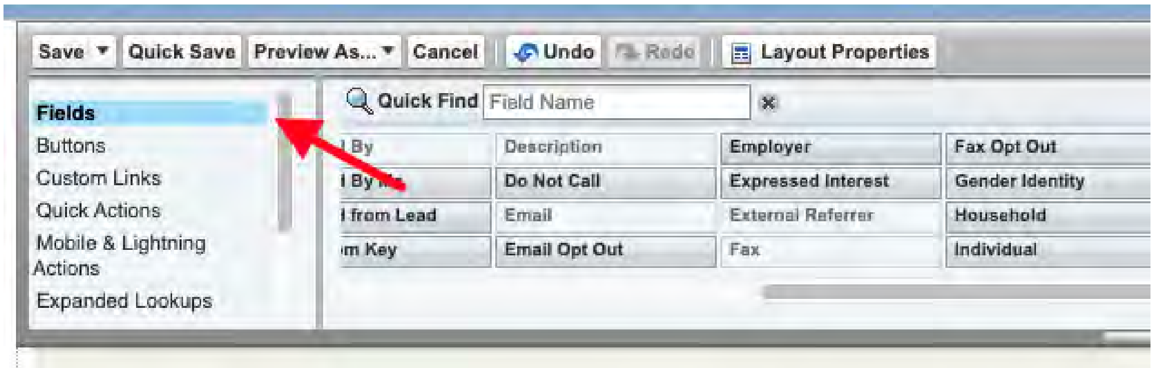
- Establish field-level security > select **Next**



- Add to Page layouts > Click **Save**

If the admin would like to add the Sync with Catchlight field to their page layouts they can navigate to **Setup > Object Manager > Select Page Layouts**

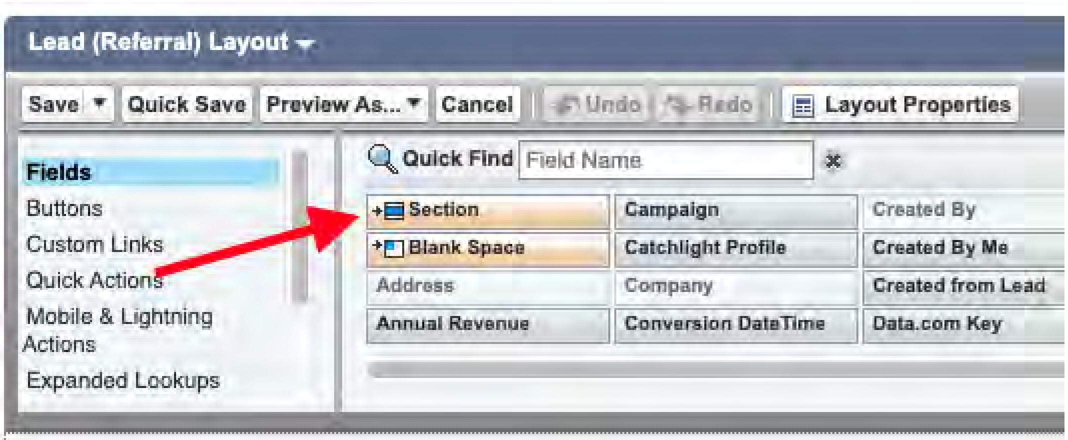
- Select Fields



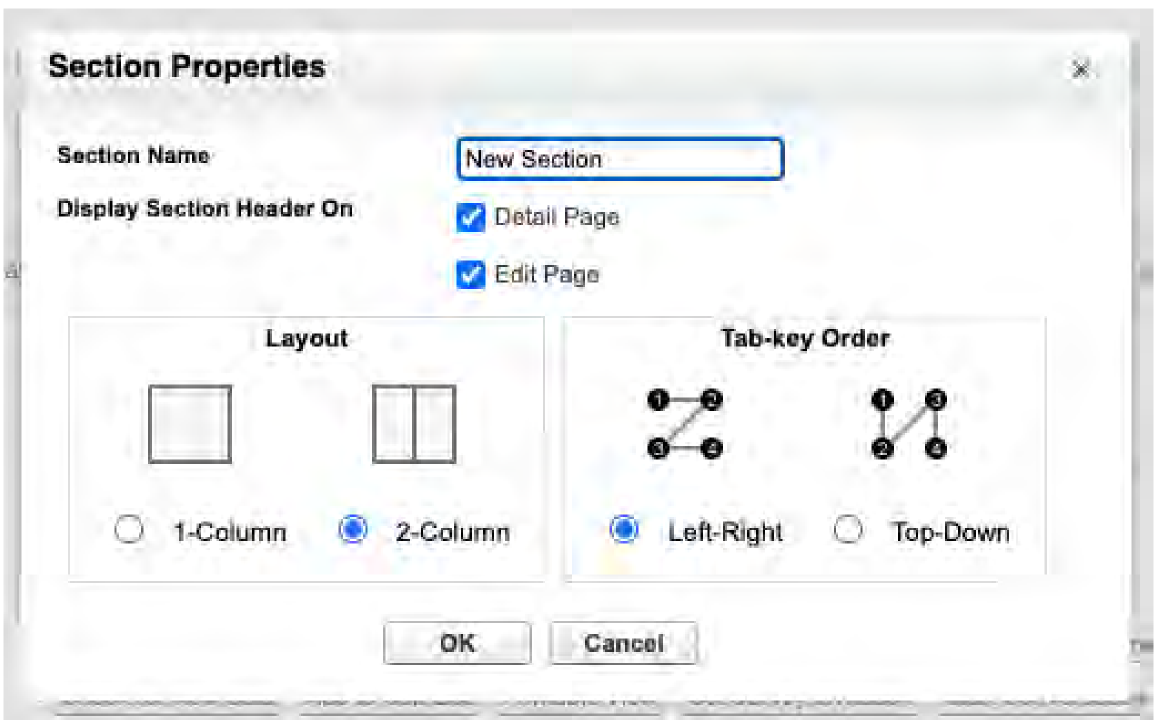
- Drag and drop **Sync with Catchlight** field onto any section that you would like
- Click **Save**

Admins can also create a section for their object page layout to include their Sync with Catchlight field. This may make it easier to locate the field when creating records to sync with the Catchlight Environment. Navigate to **Setup** > **Object Manager** > Choose whatever object you want to add the section to > **Page Layouts** > Select Layout

- In the Fields section drag Section onto your layout



- A Section Properties modal will appear and you can name the section and choose a column layout



- Click **Ok**

- Drag the Sync with Catchlight field into the section

- Click **Save**

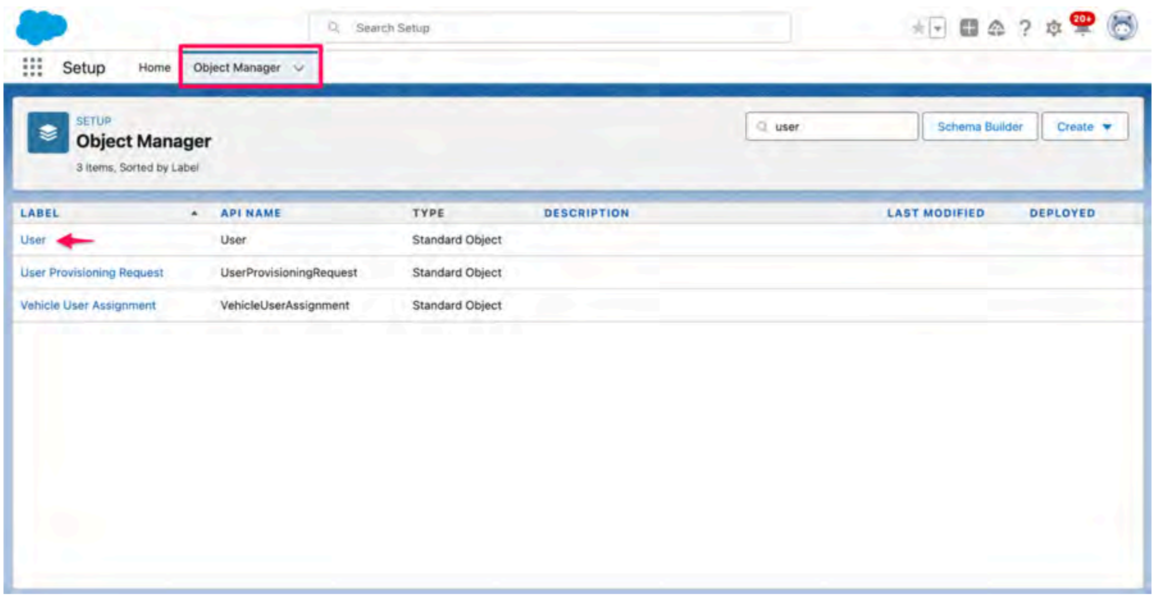
After creating and adding the **Sync with Catchlight** field to your page layout, you can follow the same steps above for the **Last Synced to Catchlight** field, with the only difference being that you choose the field type to be **Data/Time**.

NOTE: In addition to the Sync with Catchlight checkbox and the Last Synced to Catchlight Date/Time fields , it is also recommended that you add the lookup field to the Catchlight Profile (instructions for creating this field were provided in the previous section) in the same area for better visual clarity on the page layout.

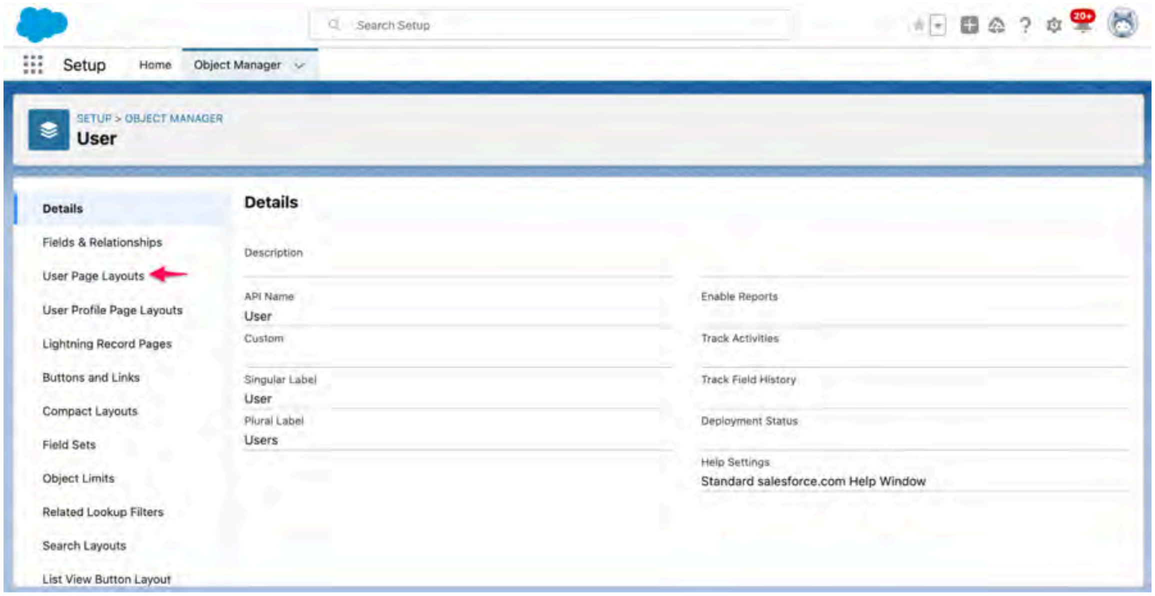
Updated in V2 - Add Catchlight ID Field to User Page Layout

The managed package includes a Catchlight ID field on the User Object in order to facilitate the sync functionality to Catchlight. If users in your org need to reference their Catchlight ID, you will need to update the User Page Layout to be able to view the Catchlight ID field directly on the User page. This section will provide you with steps to update the User Page accordingly.

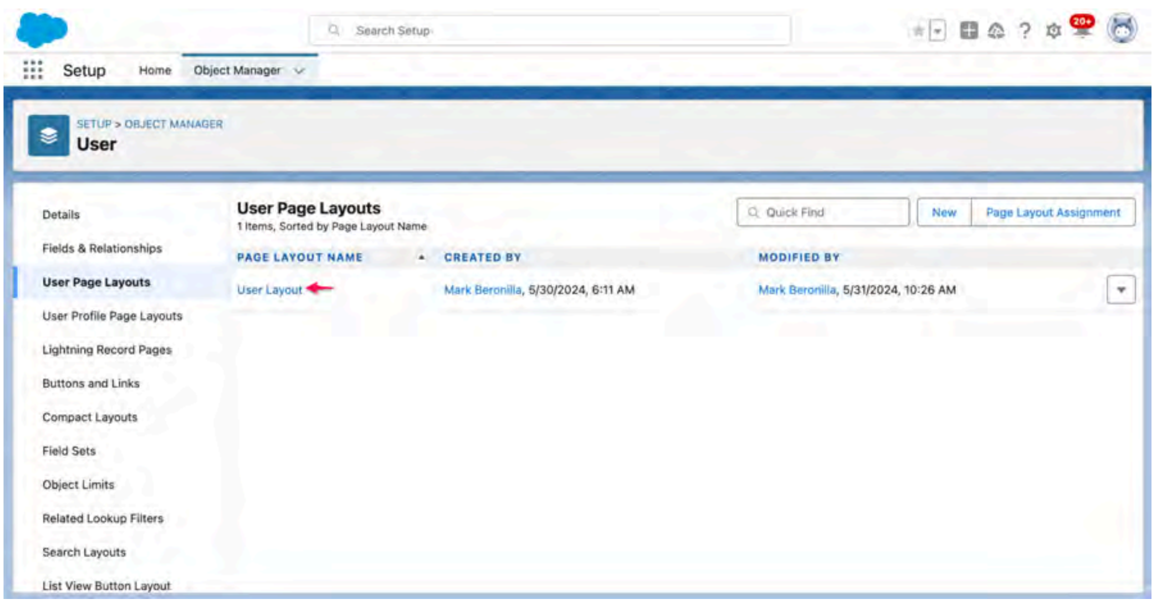
- Navigate to **Setup > Object Manager** and click on the **User** object



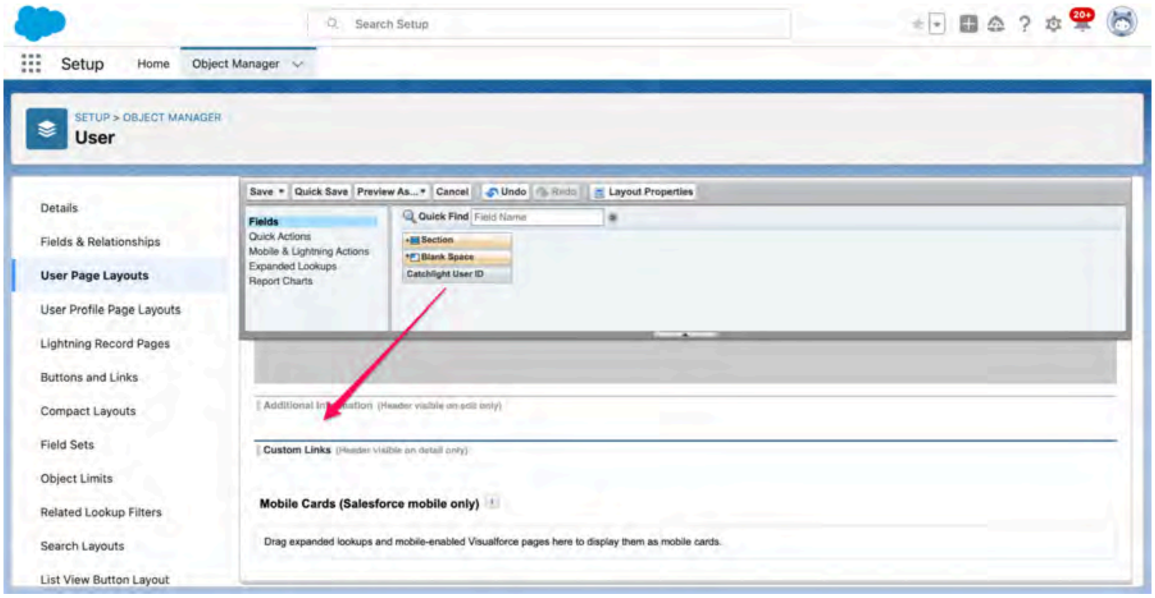
- Click **User Page Layouts**



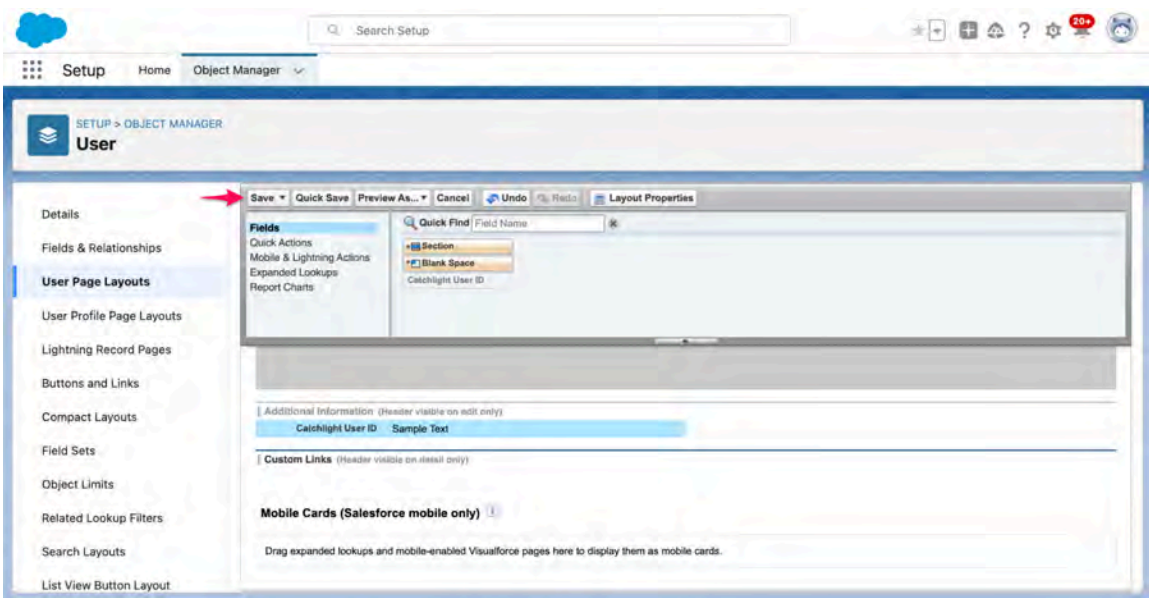
- Click the **User Layout**



- Scroll down to the **Additional Information** section and drag the **Catchlight User ID** field into the section



- Click **Save**



Updated in V2 - Catchlight Setup (Setup Assistant)

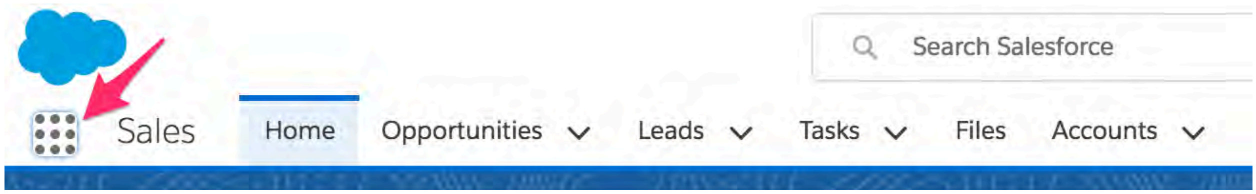
The Catchlight Setup Assistant will need to be completed to successfully configure and set up the Catchlight App. A simple, streamlined process is critical for application adoption and long-term success.

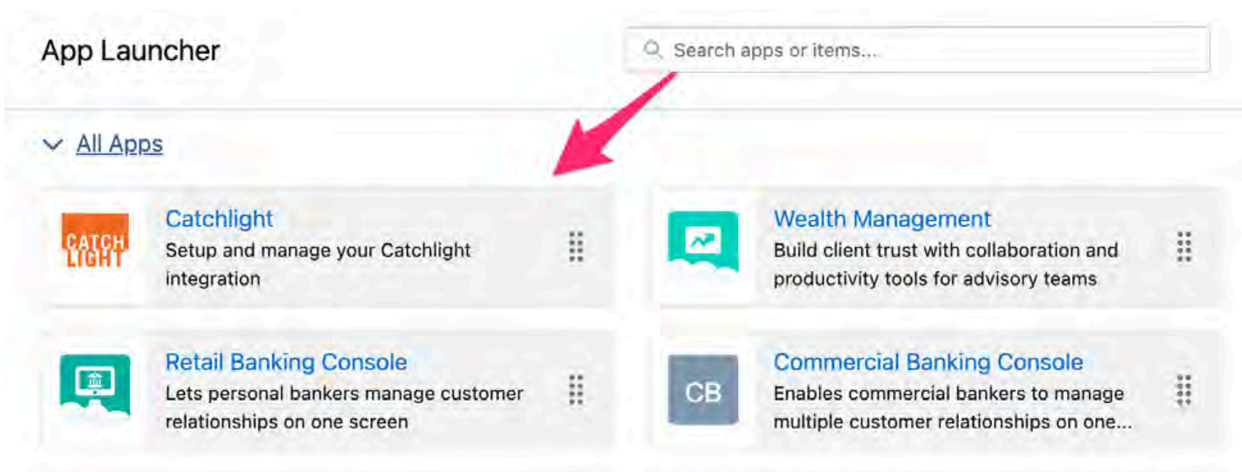
NOTE: When upgrading from V1 to V2, you will have to return to the first two steps in Setup (System Connections and Data Mapping). System Connections has a new Inbound Connection Step that is vital to using the syncing functionality in Flows.

As for the Data Mapping Step, if you had mapped a Custom Object to be synced, there will be a new "Last Synced to Catchlight" field that is required for mapping, and you will need to revisit the Custom Object mapping to update it with that new field.

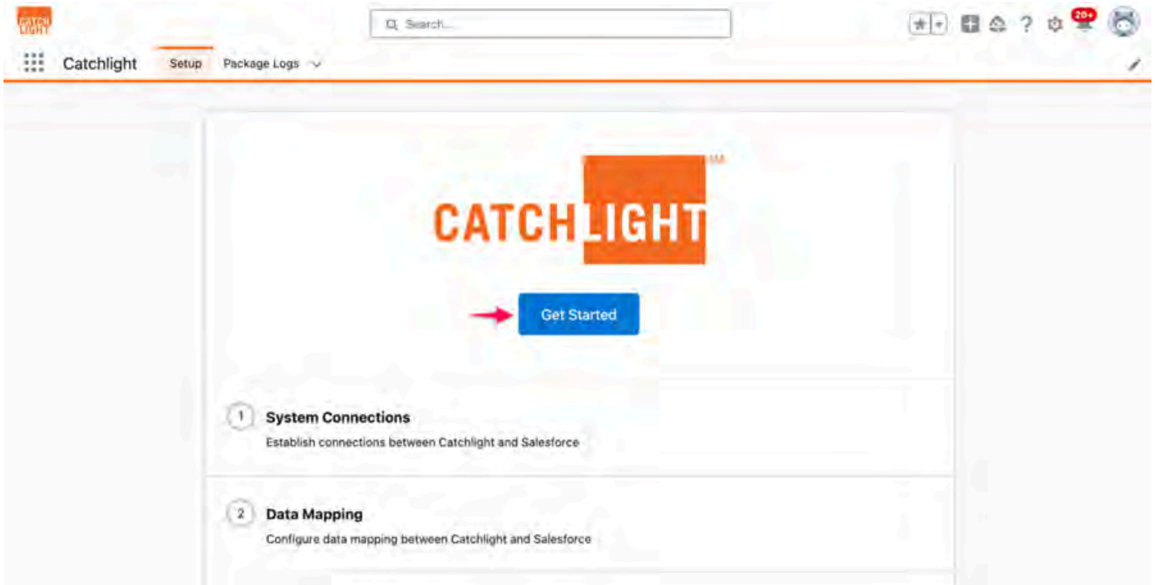
System Connections

In order to communicate with Catchlight's API, Salesforce and Catchlight both need to be connected so that the data syncing system defined later in this solution can function. The system connections setup step will facilitate the bi-directional authenticated connection. To start System Connections, navigate to **App Launcher > Catchlight**

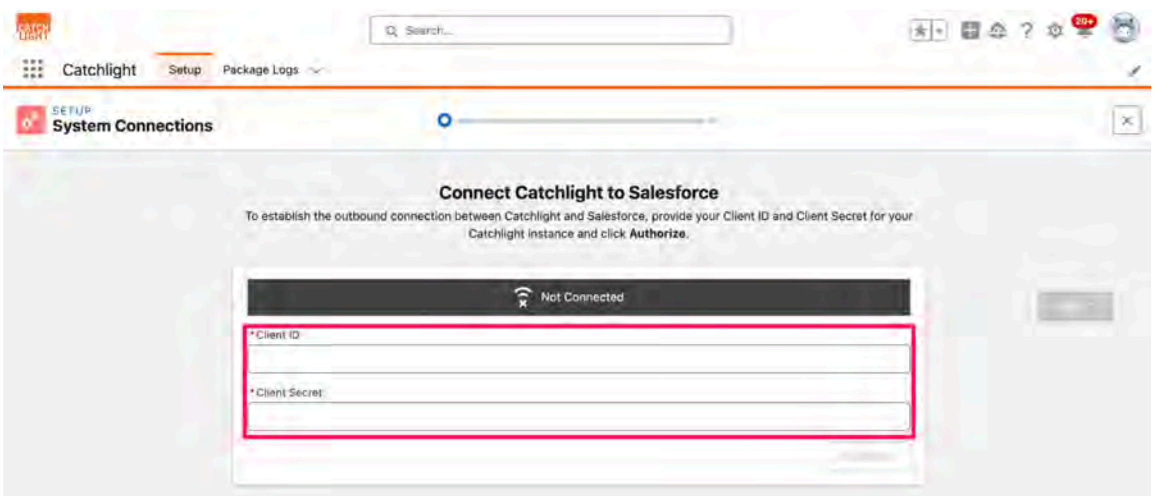




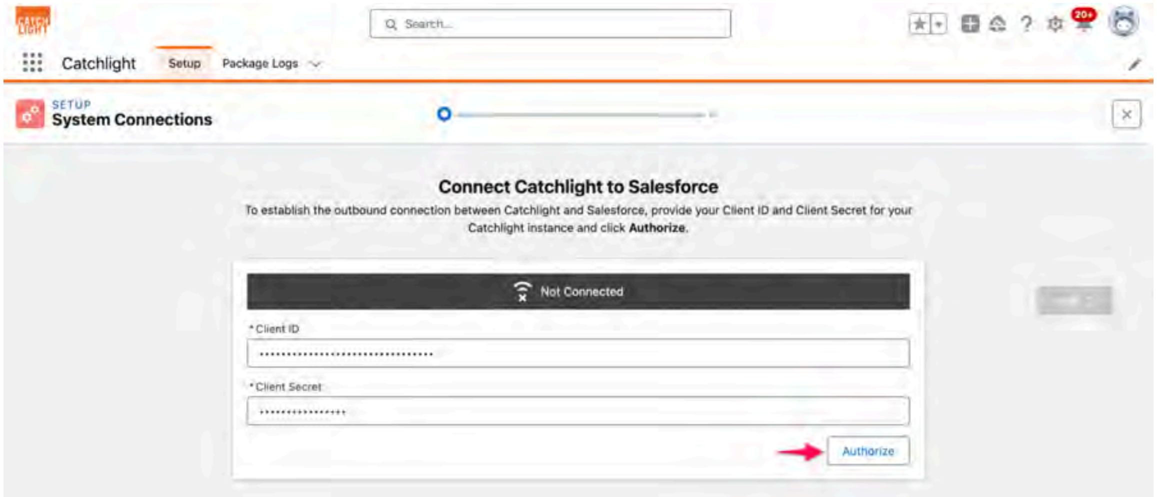
- Click **Get Started**



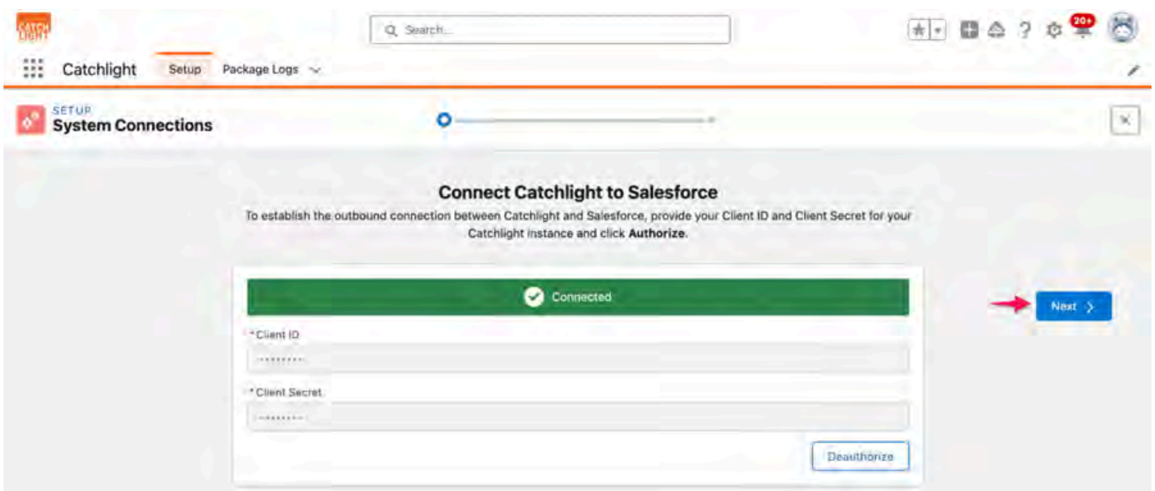
- This step will establish an Outbound Connection and allow your org to send person data to Catchlight. Enter in the **Client ID** and **Client Secret** into their respective fields - you can get these from your **Catchlight Representative**



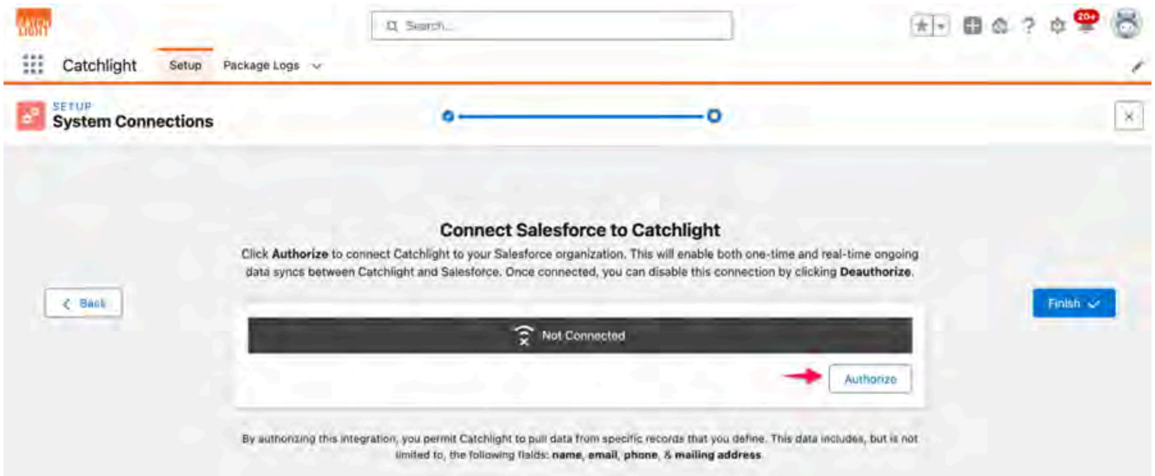
- Click **Authorize**



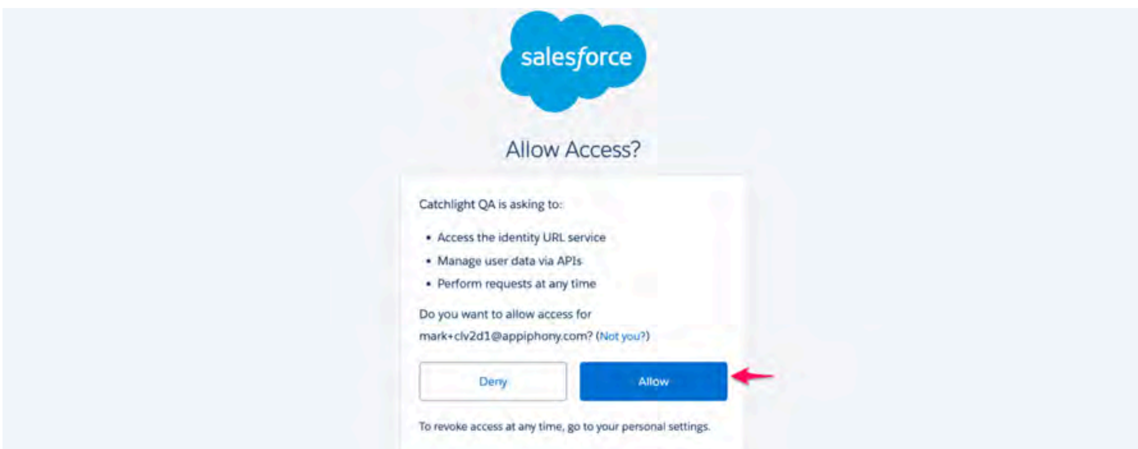
- The **Not Connected** Status bar will change to a green **Connected** Status bar to show that the connection has successfully authenticated if the credentials are input correctly. Once successfully authorized, click **Next**



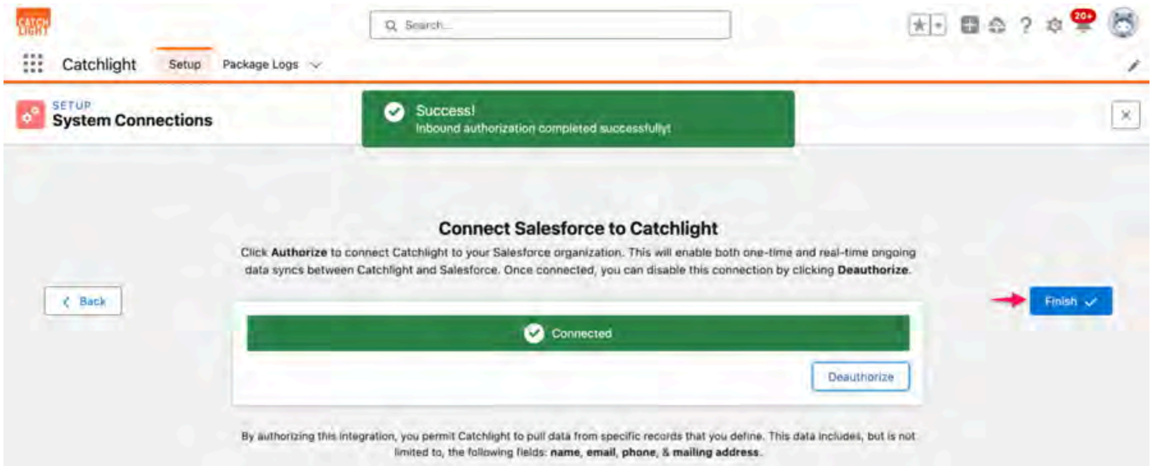
- This step will establish an Inbound Connection and allow Catchlight to send enrichment data to your org via the webservice added in V2. Click **Authorize**



- A new tab will open, prompting you to allow access to Catchlight. Click **Allow**



- The **Not Connected** Status bar will change to a green **Connected** Status bar to show that the connection was a success. Click **Finish**

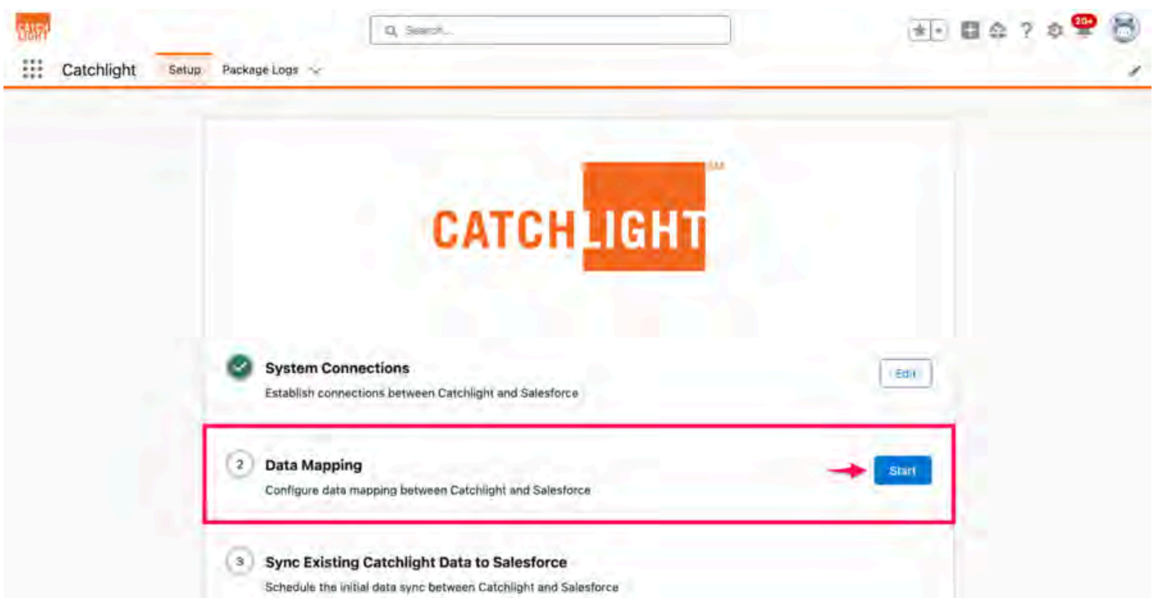


Data Mapping (Default State)

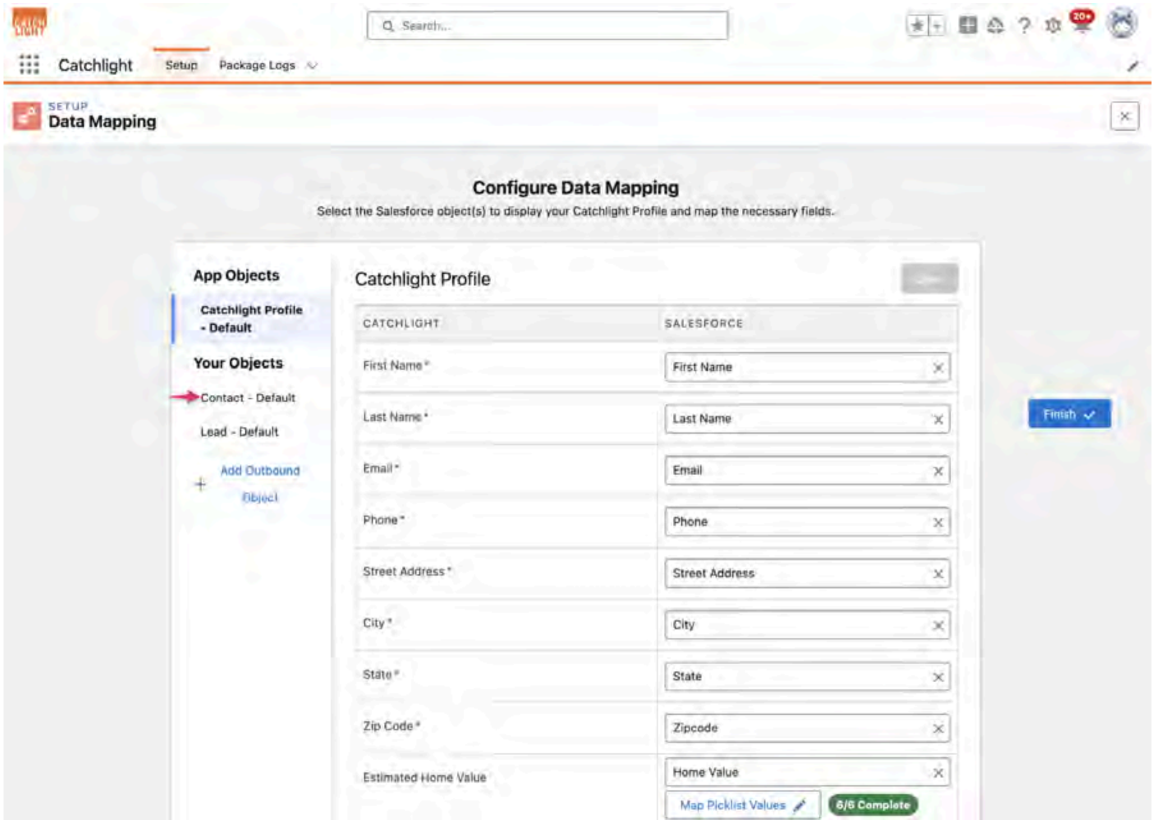
The Data Mapping step is Step 2 of the Setup Assistant which enables the user to configure data mapping from Salesforce to Catchlight. **Contact and Lead objects will be pre-populated under the Salesforce Objects navigation in the default state**. In V2 of the Catchlight App, the Contact and Lead mappings will be defaulted, and will only need to be verified. To start the process of completing the Data Mapping from a default state follow these steps:

Ensure the Systems Connections step is completed with a green check mark, navigate to the Start button next to the Data Mapping step

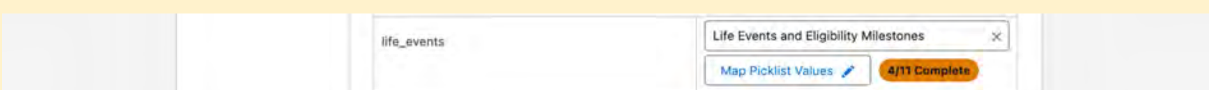
- Click **Start**



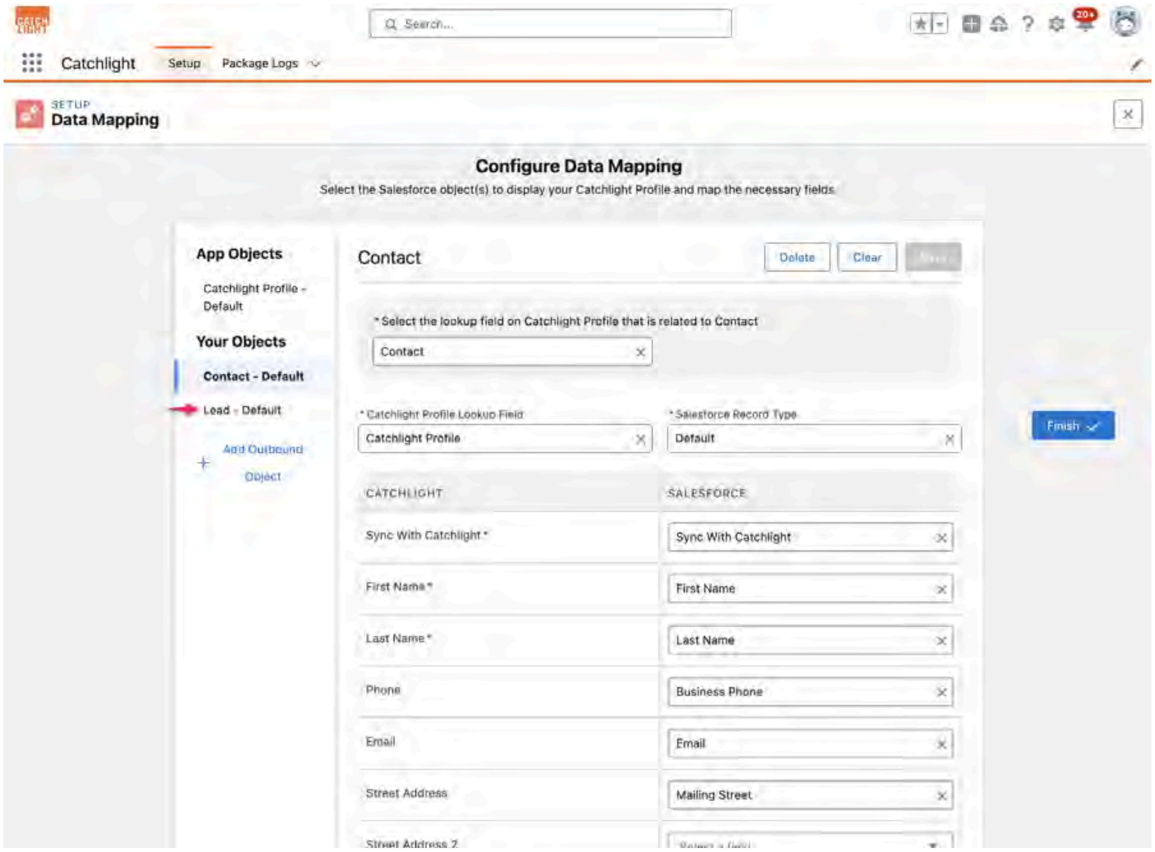
- The **Catchlight Profile** mapping will be loaded first. This will facilitate any future updates to the Catchlight data model. For now, you can leave the defaults for this mapping and click on the **Contact** mapping



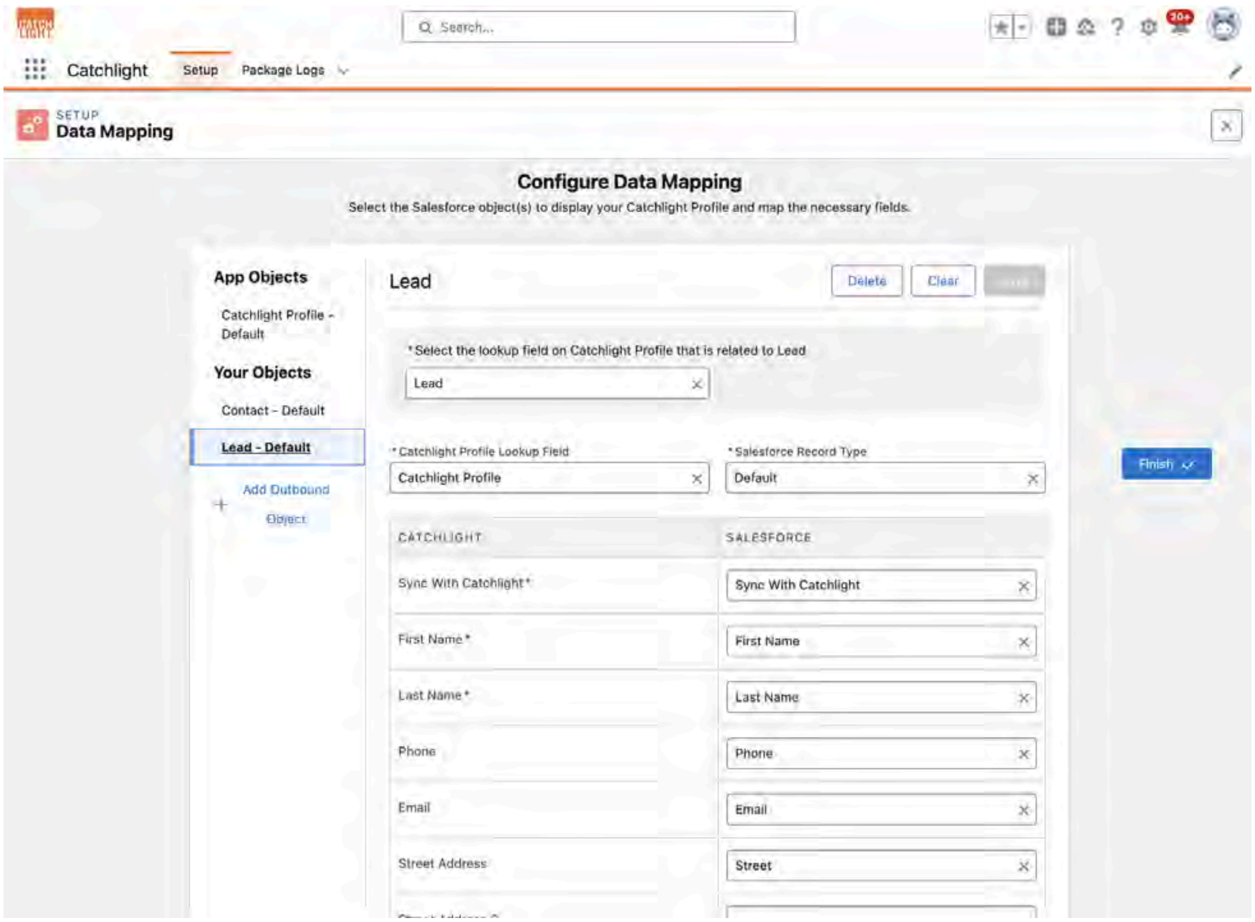
NOTE: If you are upgrading the Catchlight app from V1, you may notice some picklist values are not mapped. This is because a package upgrade does not facilitate updating picklist field values. For this reason, all picklist fields on the Catchlight Profile object are set to "Unrestricted", and leaving these values unmapped will not cause any issues with the data sync



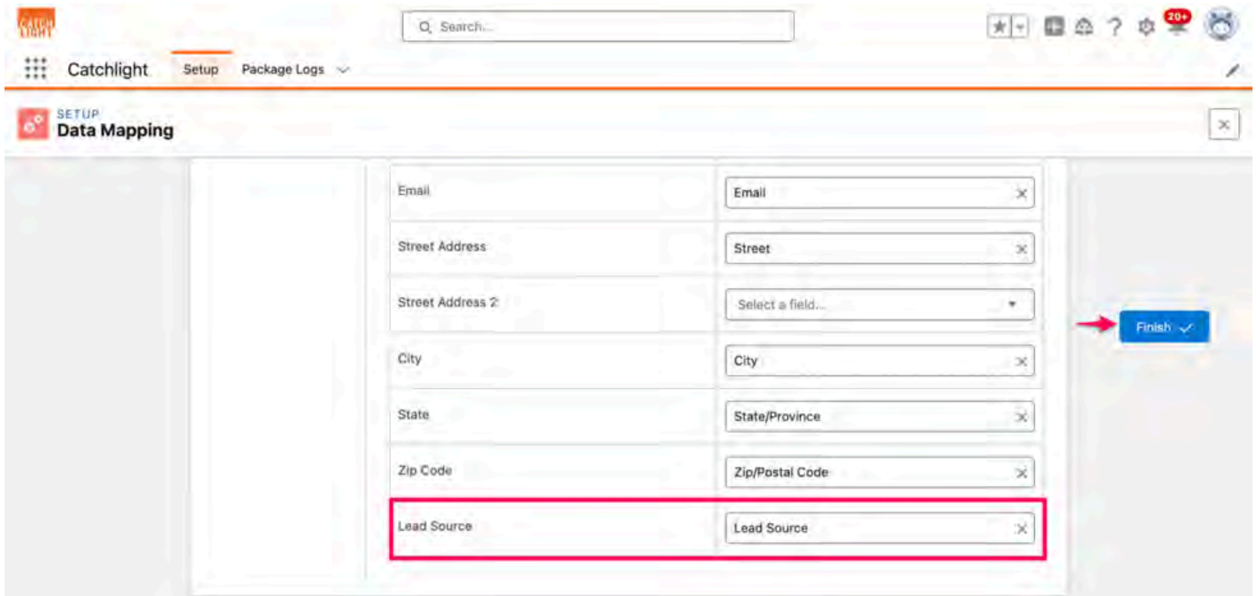
* Verify that the **Contact** field mappings are defaulted, or remain unchanged from the package upgrade, then click the **Lead** mapping



- Verify that the **Lead** field mappings are defaulted, or remain unchanged from the package upgrade



- Scroll down to the bottom mapping row. In V2, the Catchlight app has a new Outbound mapping for **Lead Source**. If you are upgrading from V1, you will need to map this field to the **Lead Source** field on the **Lead** object. From a fresh install, this field mapping will already be mapped by default. Once mappings are set to your liking, click **Finish**

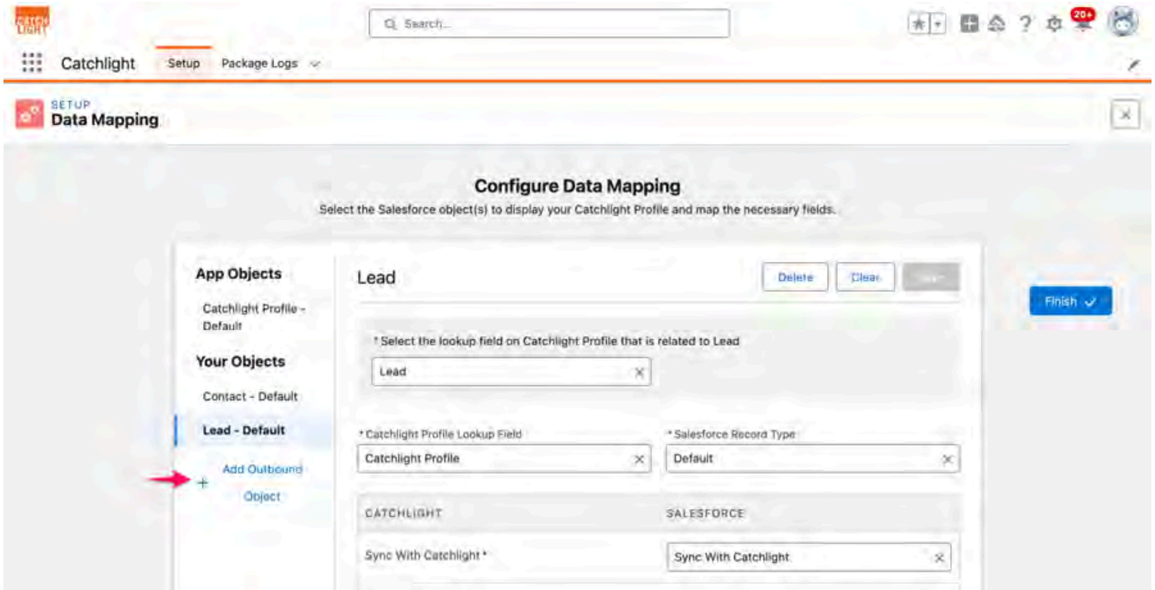


Data Mapping (Adding Object Mappings)

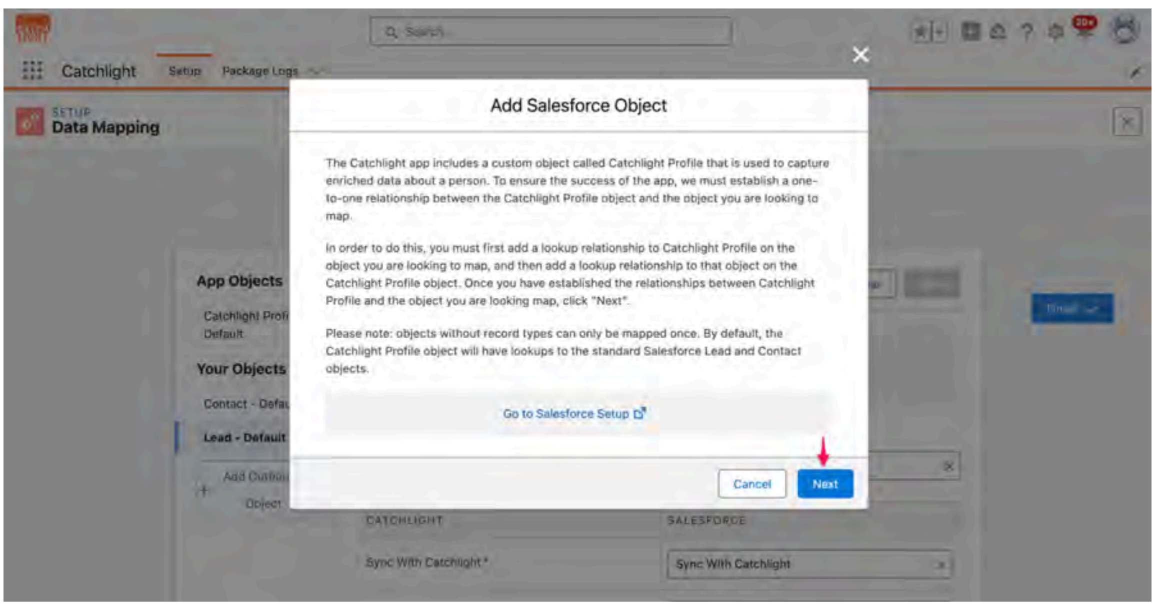
Admins can add multiple mappings to the same object but they must be of different record types. For example, a user can map the Contact object with record types Business and Individual. Objects without record types can only be mapped once. These objects will only have a "Default" option for the Salesforce Record Type. Please note, a user cannot add another object if they have not saved the mapping that they are currently on. In order for you to add a mapping for an object, you will first need to make sure that bi-directional lookup fields and the Sync with Catchlight field are created for that object. You can refer to the previous sections on how to create these fields and add them to their respective Page Layouts.

NOTE: You can follow the steps outlined below for any object, granted that object contains the bi-directional lookup and Sync with Catchlight fields. In this example, we will be using a Custom Object, created and set up with the prerequisites listed above, named "Catchlight Lead".

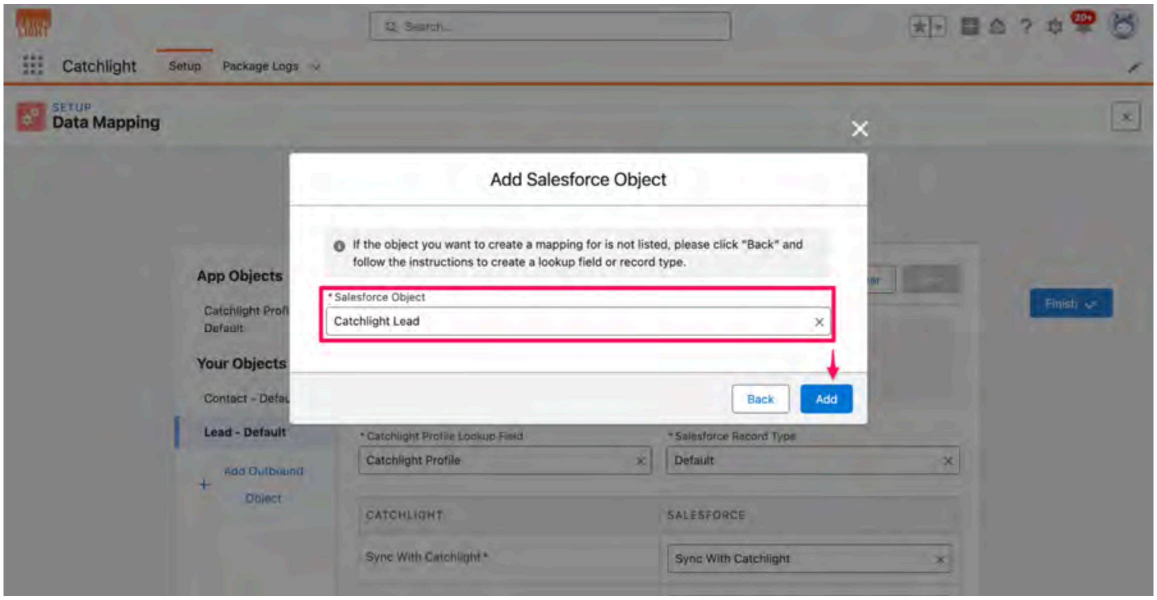
- Back on the **Data Mapping** Page, click on the **Add Outbound Object** link



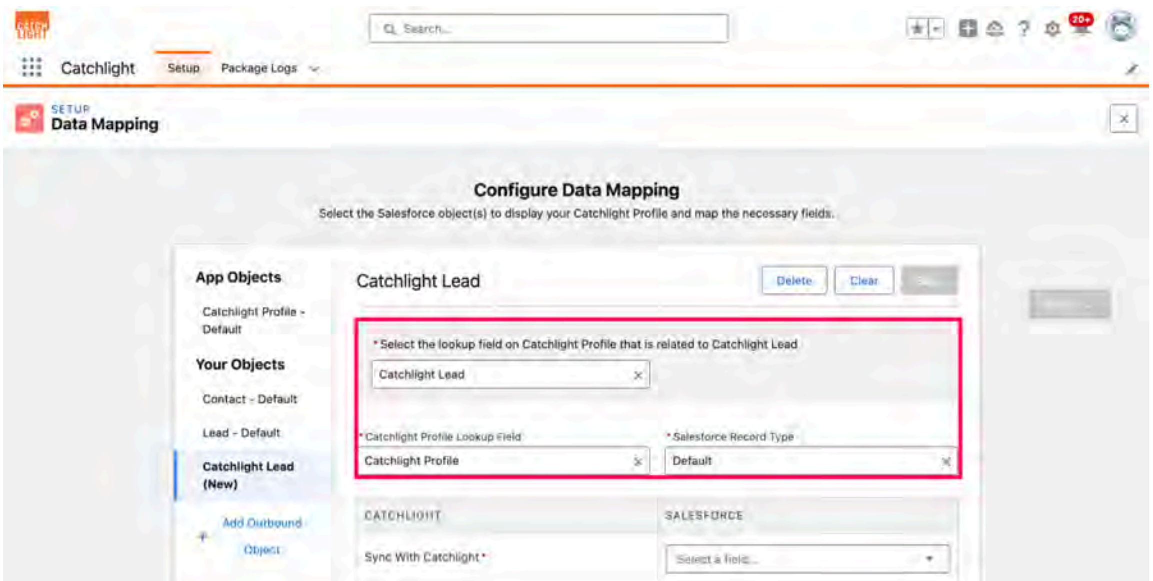
- Click **Next**



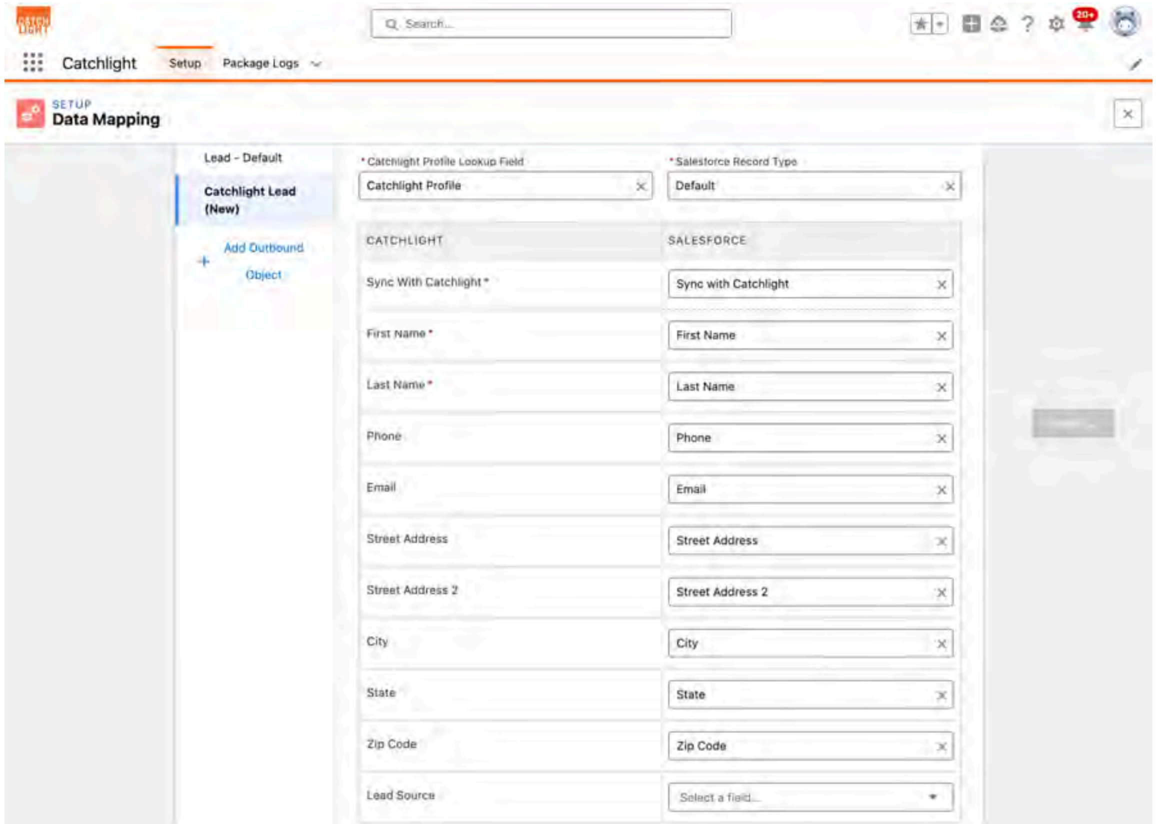
- Select the **Catchlight Lead** object and click **Add**



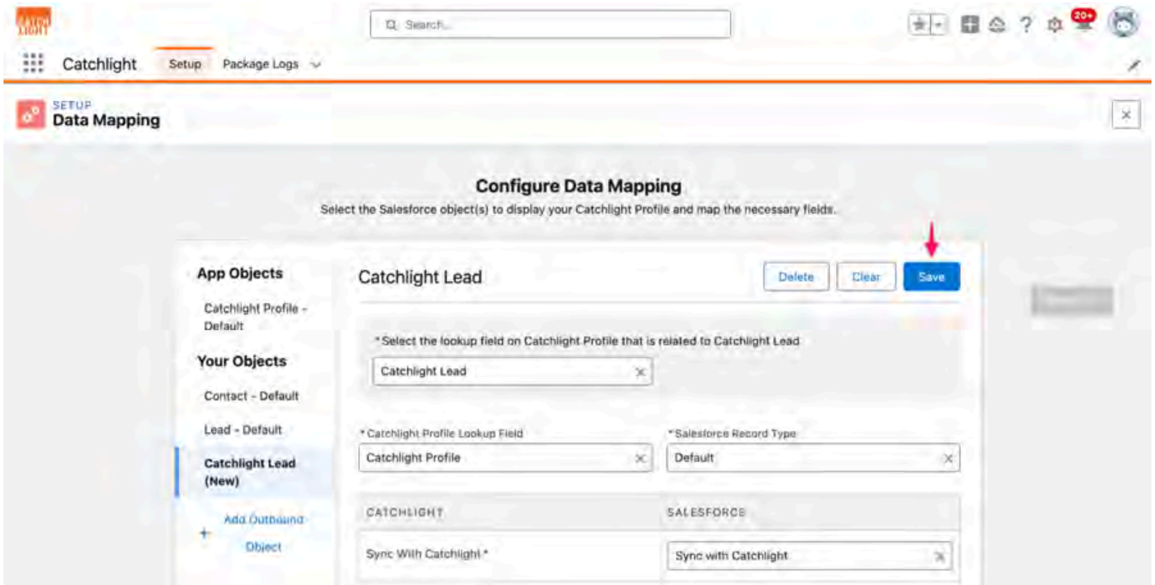
- Select the correct Lookup and Record Types to be used for the mapping. If you created the correct bi-directional lookup fields, you should see them among the picklist values



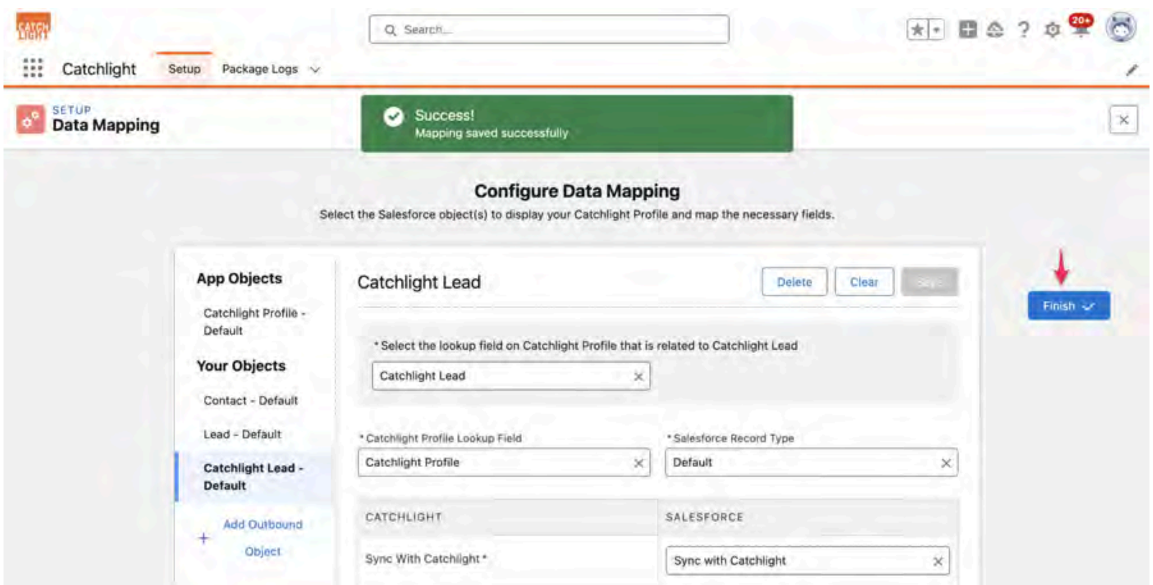
- Fill in the rest of the mappings



- Click **Save**



- Once the mapping is saved, click **Finish**



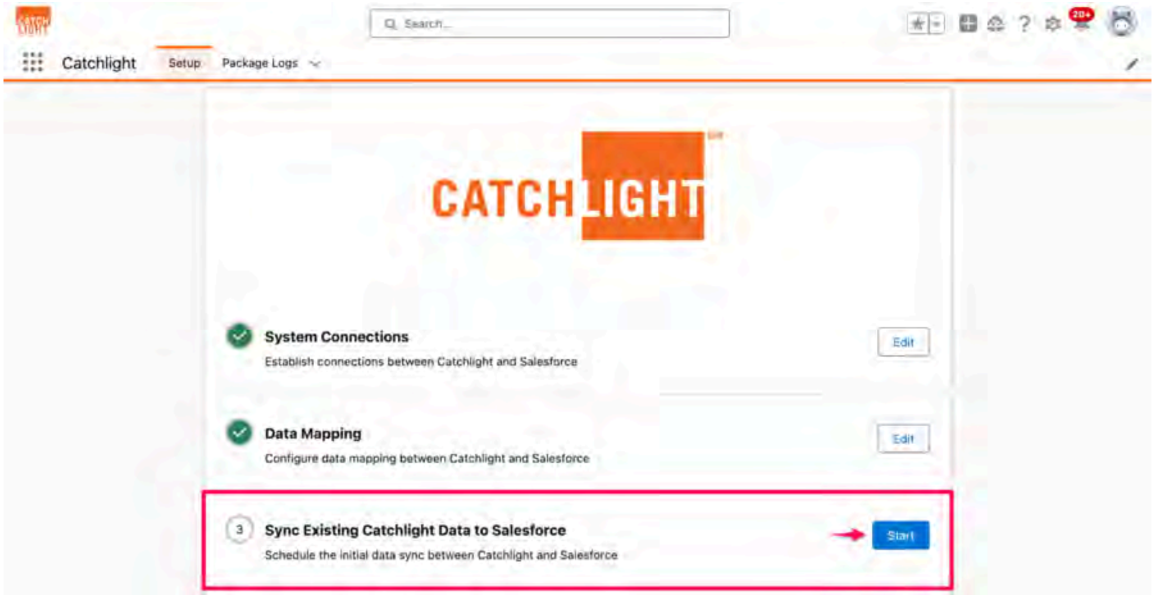
Data Sync Management

Person data needs to remain in sync between Catchlight and Salesforce. This system will utilize a batch job scheduler step in setup along with a series of Apex batch jobs to manage the data syncing process. Admins can set the frequency and start time of the sync job. The outbound sync job will sync any records that have been created, updated, or deleted since the previous job run. The inbound sync job will pull in any Catchlight profile data from Catchlight and store the information in the Catchlight Profile record.

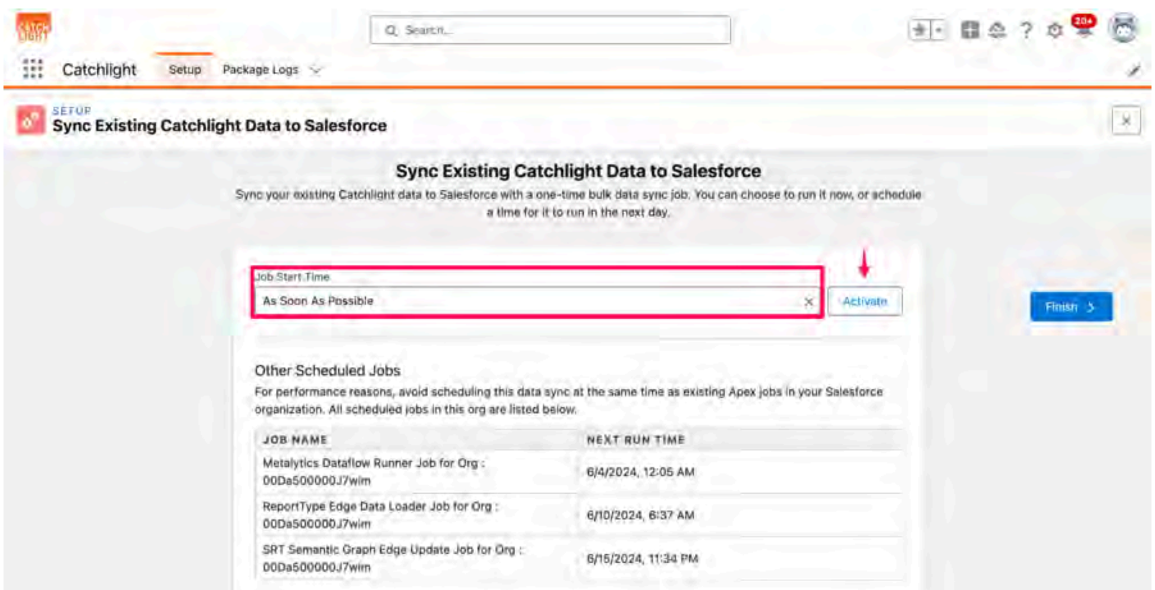
In V2 of the Catchlight app, the batch syncing system functionality has been changed to be a one-time-only run. This use case is for any existing records that have not been synced yet prior to installing the V2 package. Both Outbound and Inbound sync functionality will remain the same in the batch job, but moving forward, the Outbound sync functionality will be delegated to the new packaged Sync Flows, outlined in a later section, and the Inbound sync will be handled by the new webservice that was previously set up in System Connections.

If you do not have any pending data that needs syncing, you can skip this step by clicking **Start**, then clicking **Finish** on the next page. Otherwise, the steps to activating the job are as follows.

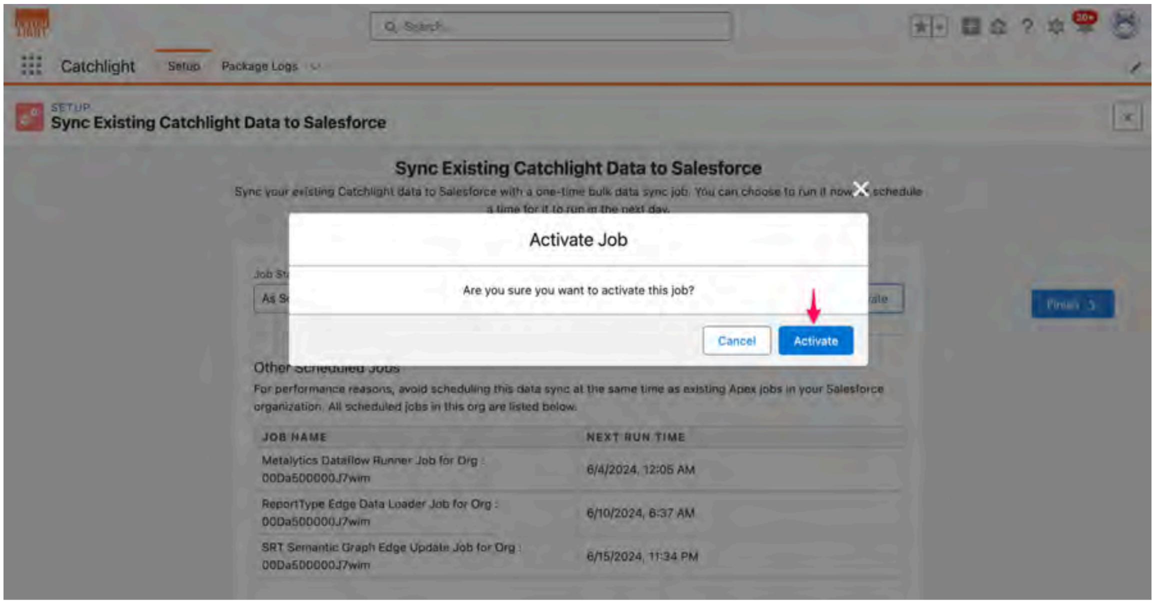
- Click **Start**



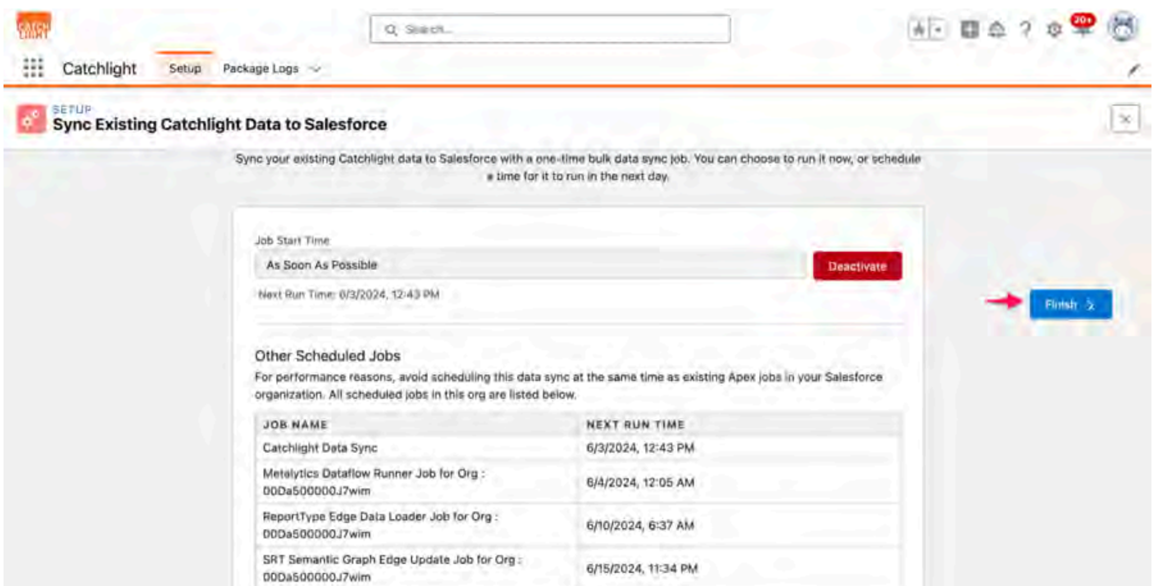
- Select a **Job Start Time** and click **Activate**



- In the modal, click **Activate**



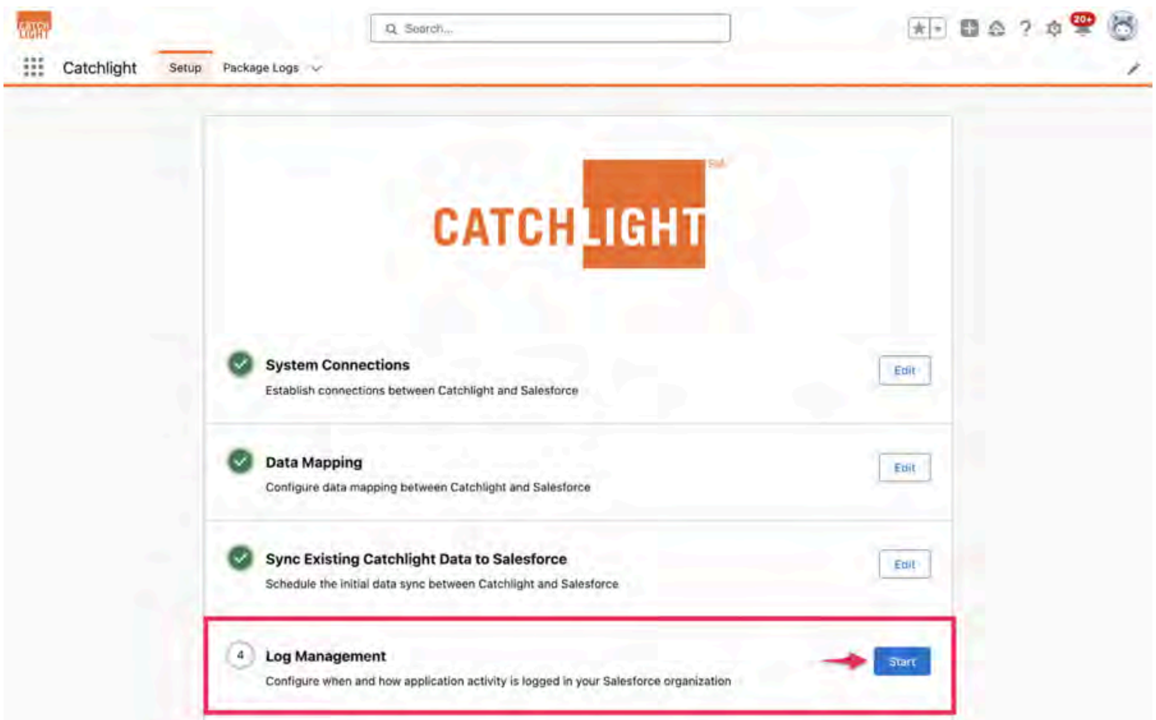
- Click **Finish**



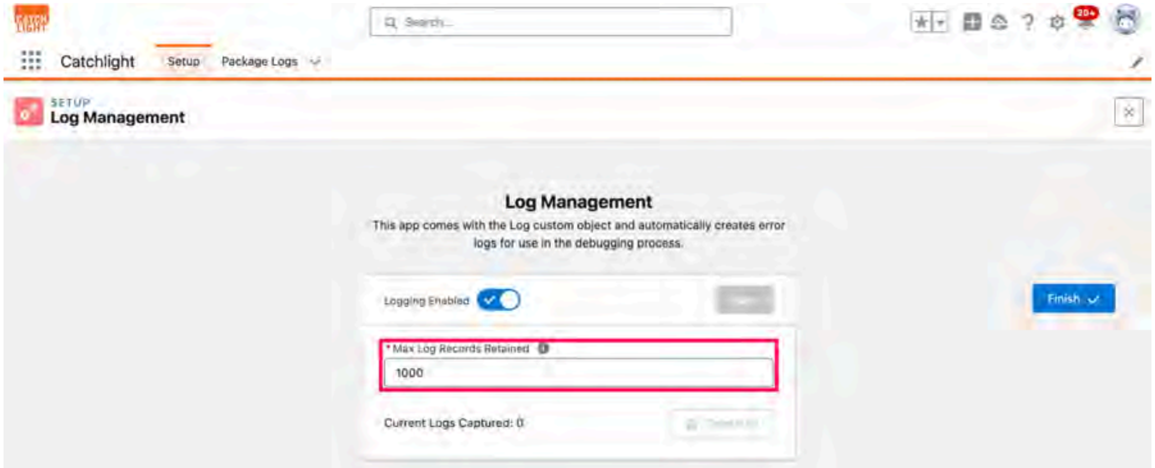
Log Management

In an effort to improve the reliability of the Catchlight app, the package will include error-logging capabilities and a setup assistant section to manage the settings of the error logger. The integration admin will be able to limit the number of records stored in the org by entering a numerical value. Should the number of records in the org reach this number, any new log records will cause the oldest log record to be deleted prior to being saved.

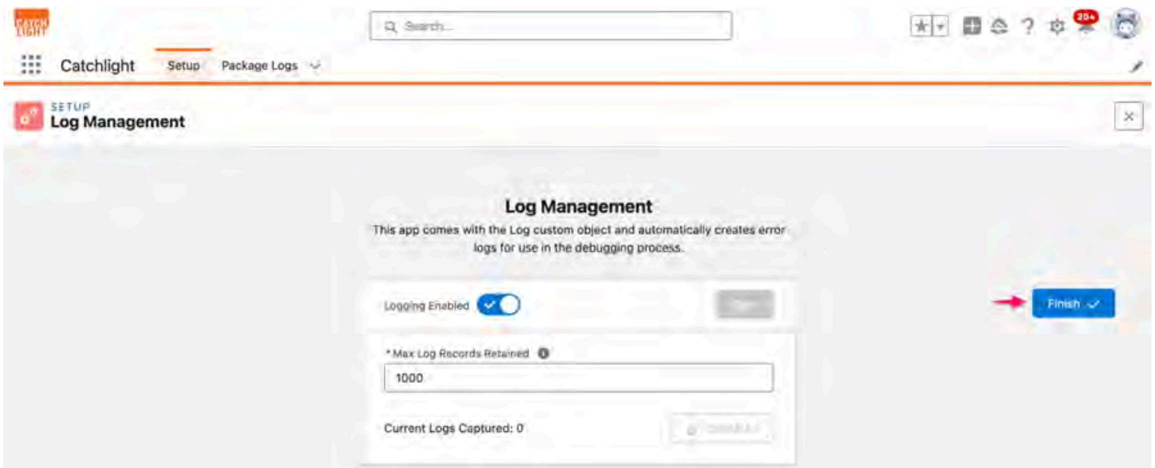
- To begin the configuration of the Log Management step, click **Start**



- Enter Max Log Records retained. 1,000 will be populated by default



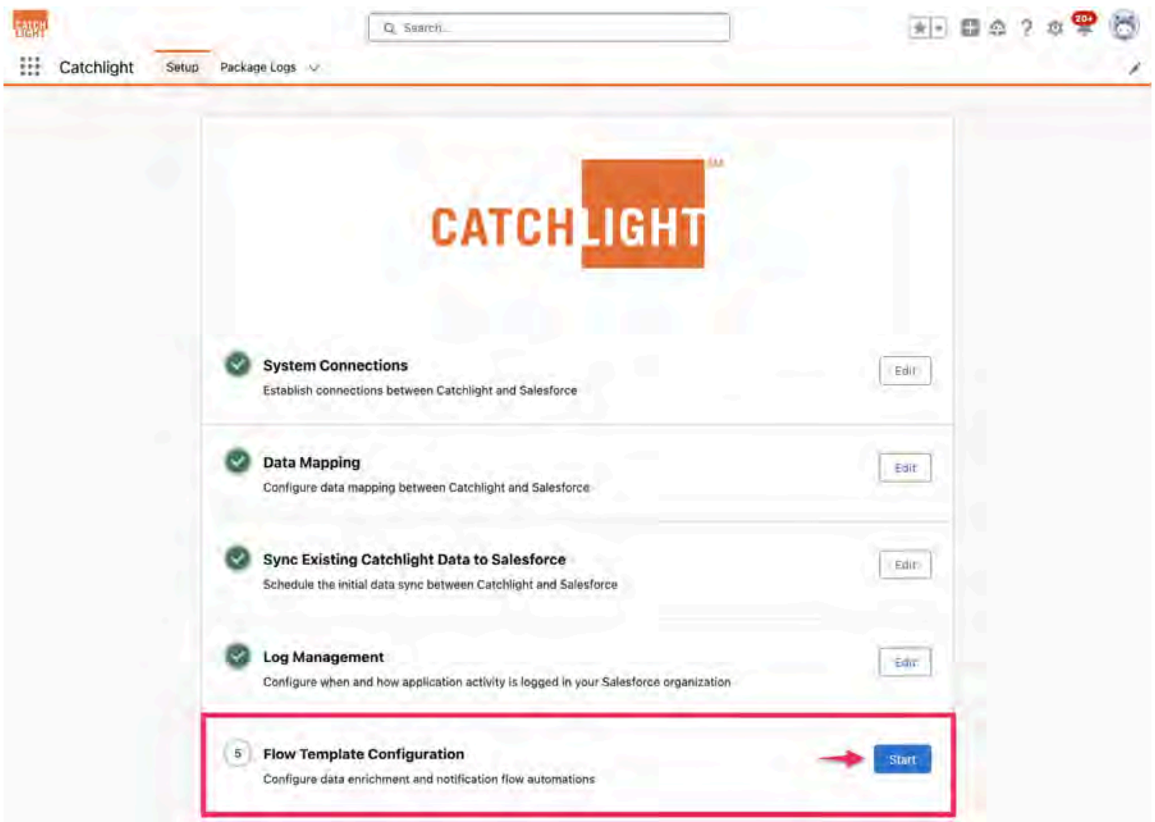
- Save your changes, then click **Finish**



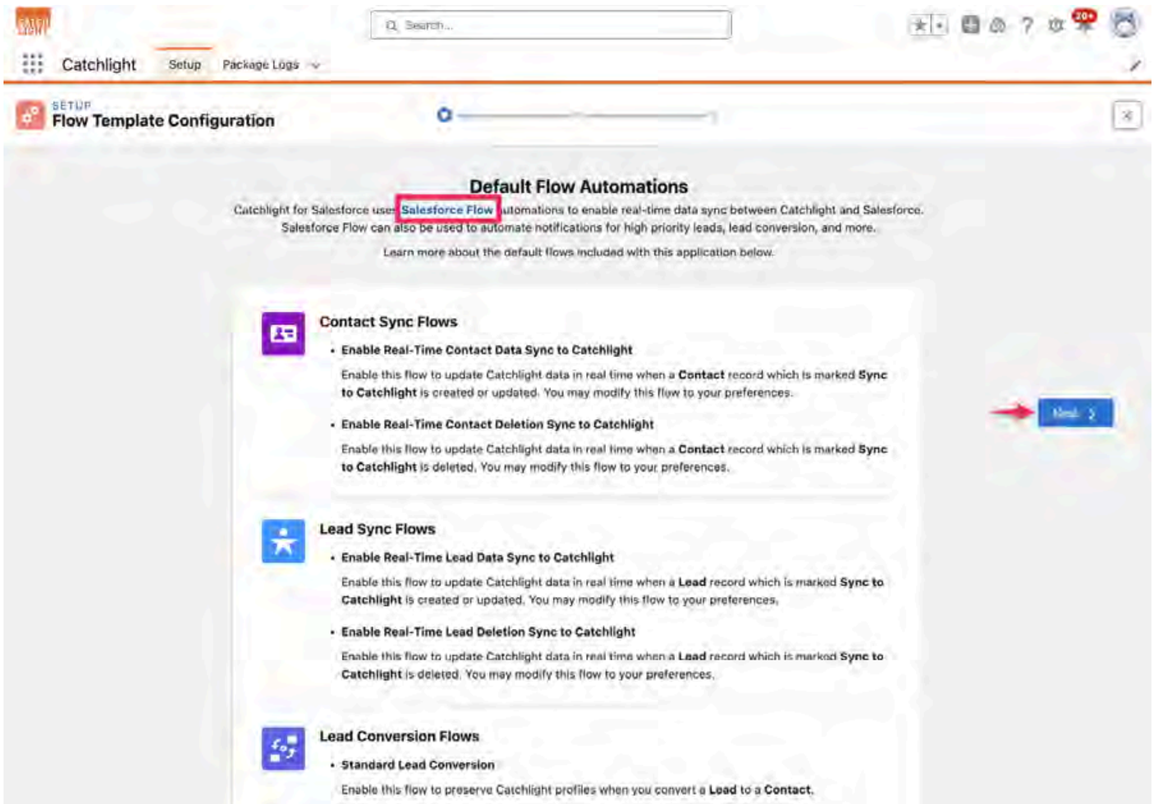
Flow Template Configuration

In V2 of the Catchlight app, there is a new 5th section of the Setup page called Flow Template Configuration. This is an informational step about the packaged flows that will be outlined in the next section. You may look through the steps as you see fit, but the setup of the flows will be covered in the next section, so the following instructions will only guide you through navigating the information steps.

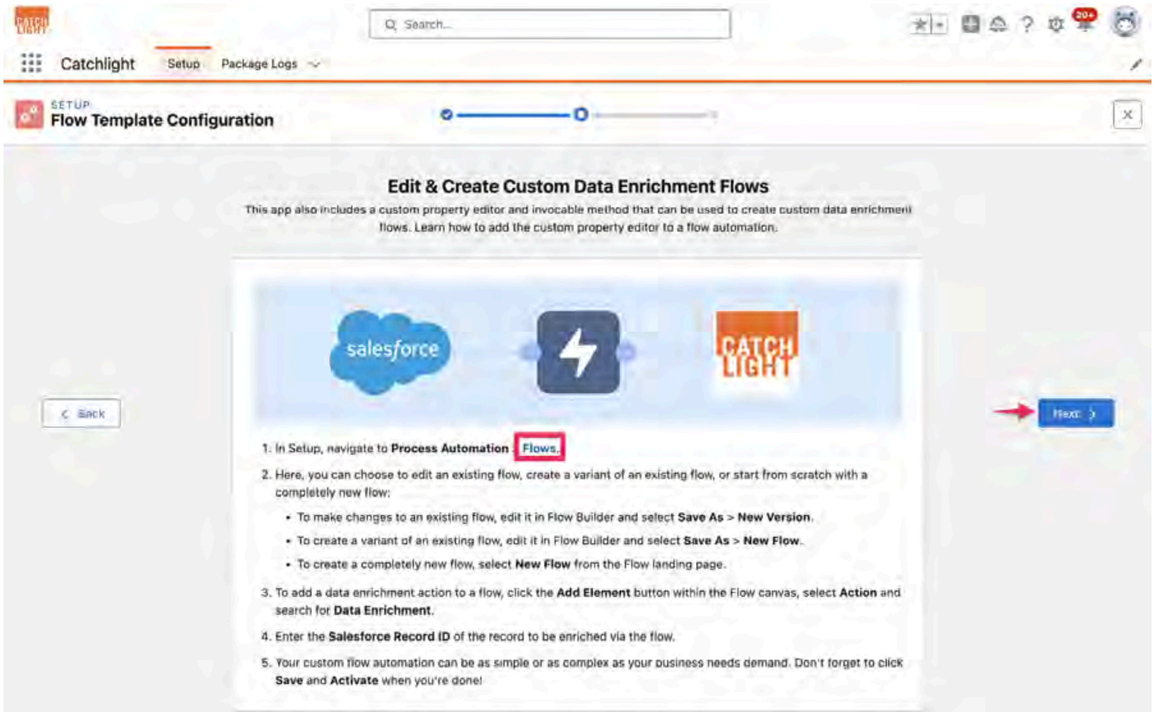
- Click **Start**



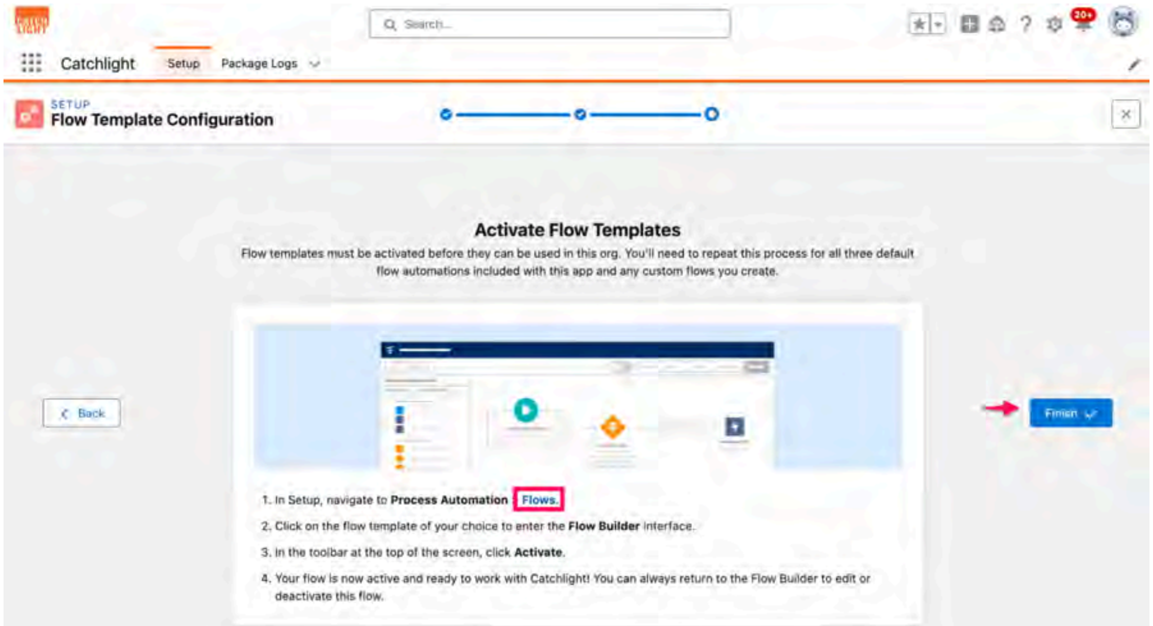
- There is a **Salesforce Flow** link that will navigate you to a help article from Salesforce that provides information on Flows. You may review the article and informational page, then click **Next**



- There is a link to the **Flow List** of your Salesforce org for easy access. You may review the informational page, then click **Next**



- There is another link to the **Flow List** on the final page. You may review the informational page, then click **Finish**



Updated in V2 - Packaged Flows Overview

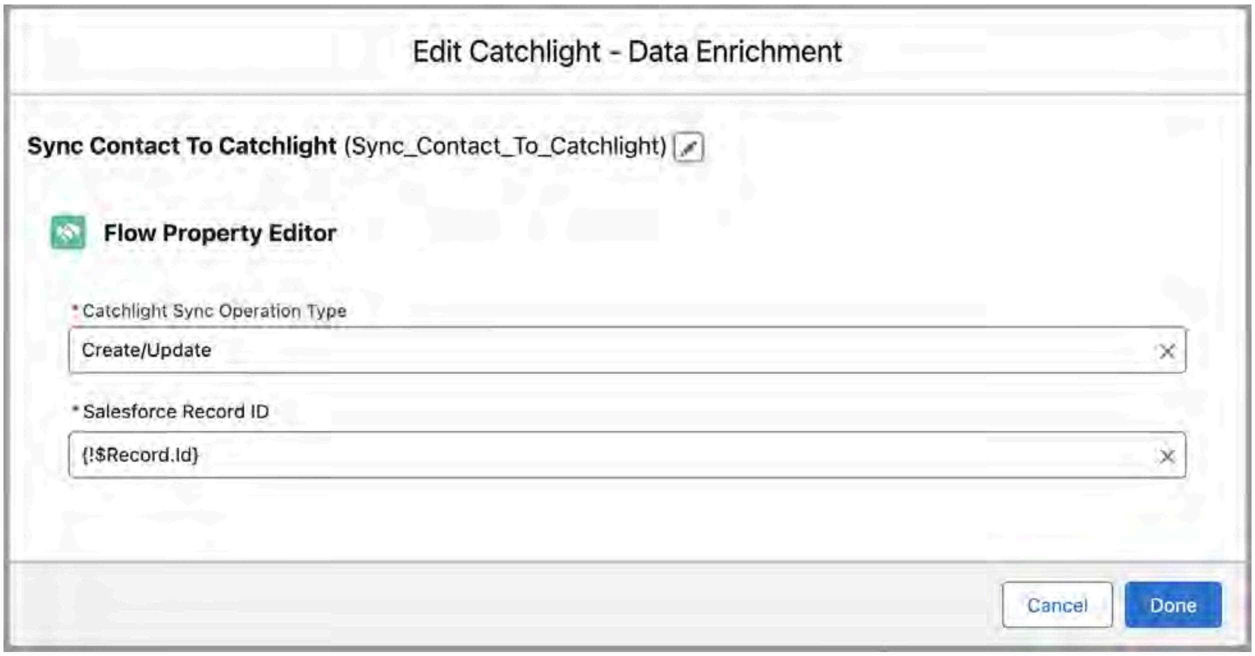
After completing the **Catchlight Setup App**, you will be able to fully utilize the packages Flows for Outbound syncing. The following sections will provide you with information on how the Flows work, as well as instructions on how to clone existing Flows to be used for other objects, and how to activate your Flows.

A quick reference to the packaged Flows are listed below.

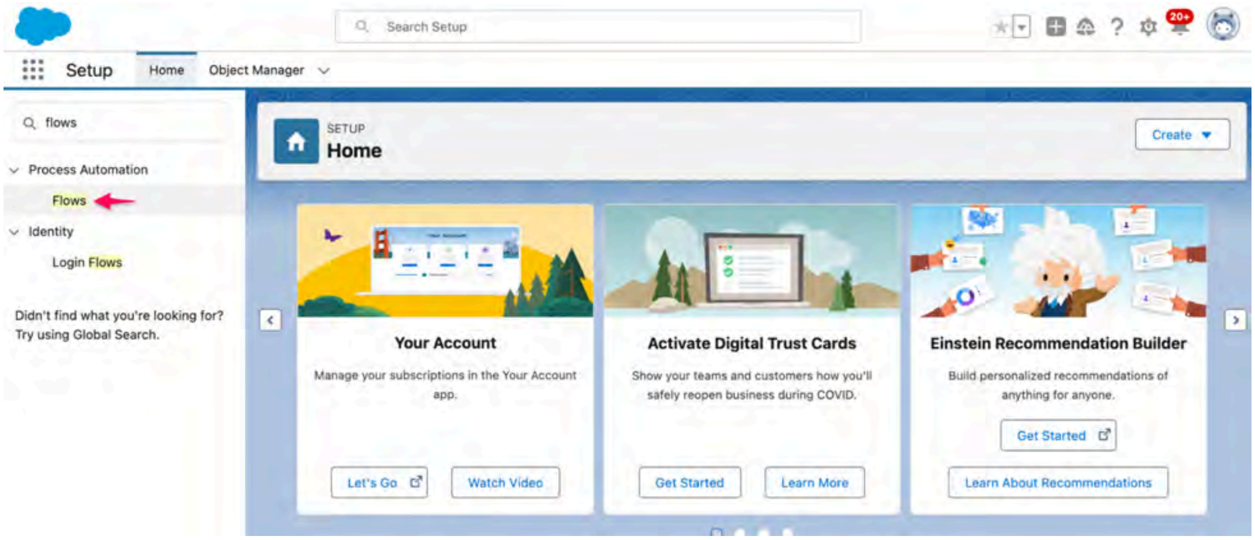
- Lead Conversion Flows
  - Added in V1 - Standard Lead Conversion
  - Added in V1 - Lead Conversion for Opportunities
  - Added in V2 - Update Catchlight Profile Flow
- Added in V2 - Create/Edit Sync Flows
  - Sync Contact to Catchlight
  - Sync Lead to Catchlight
- Added in V2 - Delete Sync Flows
  - Delete Catchlight Profile (Contact)
  - Delete Catchlight Profile (Lead)

The Flows provided in V1 come packaged as Inactive, because they offer secondary functionality, and will not be needed for the main sync functionality. Alternatively, the Flows provided in V2 come packaged as Active, because they are essential components to the new Outbound sync.

The majority of the Flows provided in V2 include a packaged **Custom Property Editor** that performs the Outbound Sync functionality. There are 2 modes of Sync: Create/Update and Delete.



Each Flow type will be covered in their respective sections. In order to view and edit these flows, navigate to **Setup > Process Automation > Flows**



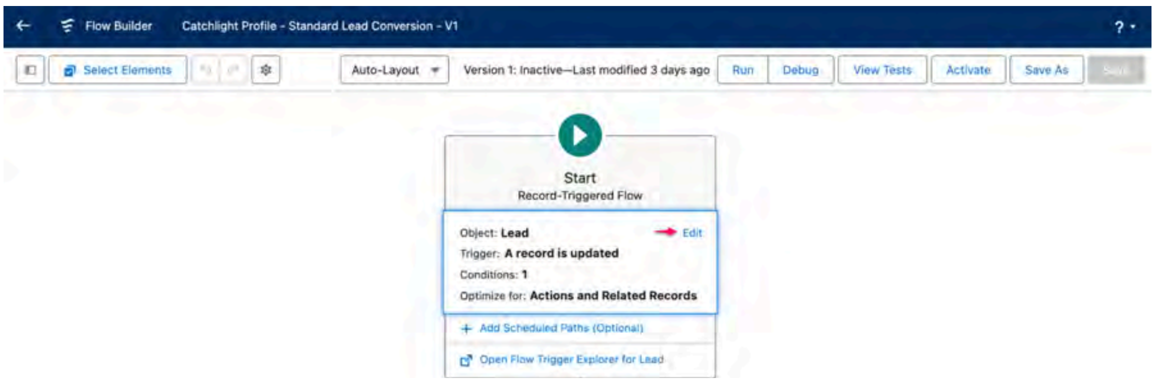
Updated In V2 - Lead Conversion Flows

Standard Lead Conversion Flow

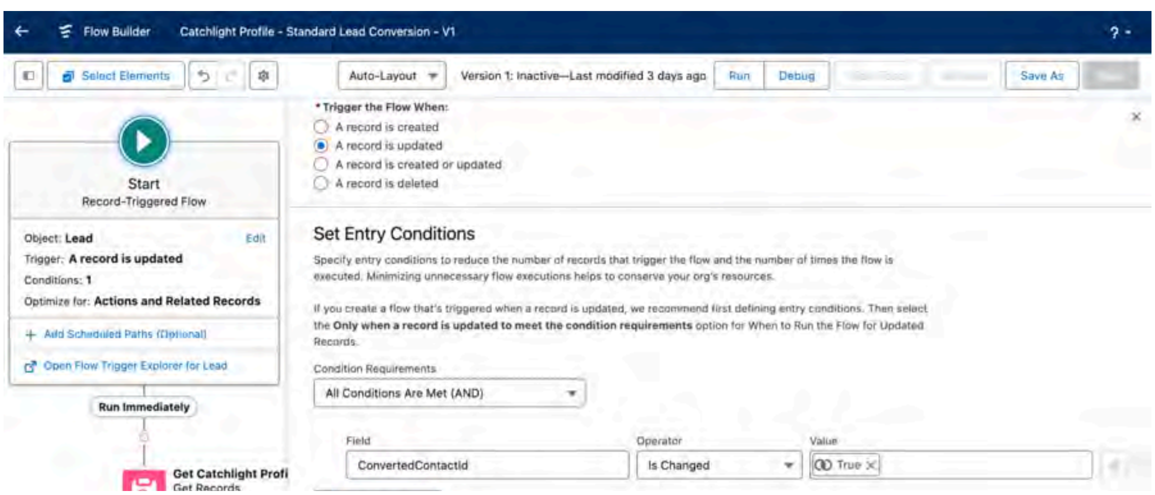
This Flow is triggered when a Lead is converted into a Contact. It will reassign the Catchlight Profile record from the Lead to the newly-created Contact.

Start Node

- Click **Edit** to view the details of the node

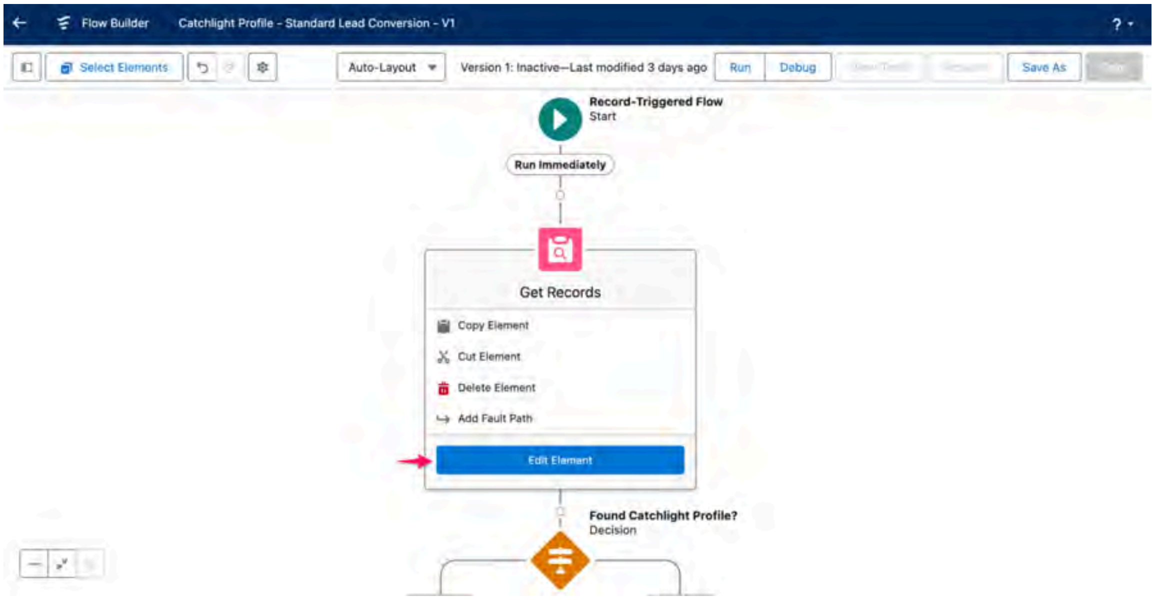


- The Flow is fired off the Lead object. It is triggered every time a record is updated and meets the condition requirements.

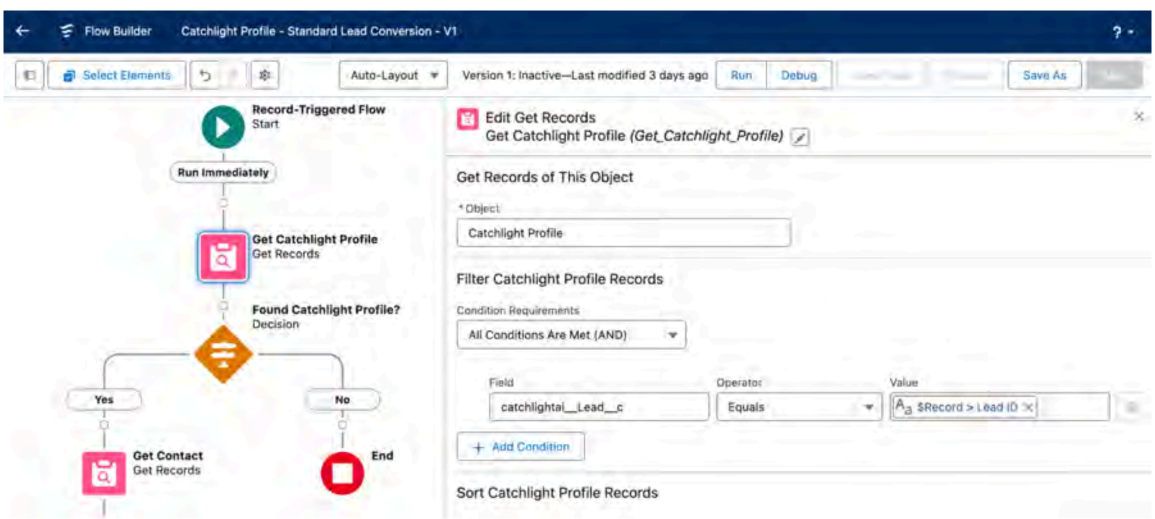


Get Catchlight Profile Node

- Click **Edit Element** to view the details of the node

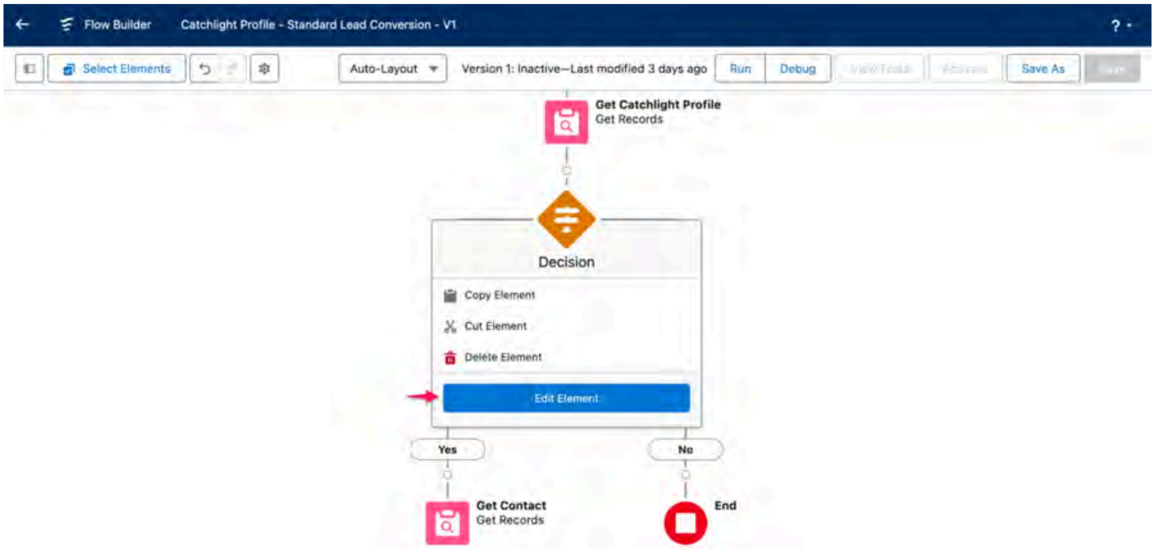


- Get Catchlight Profile is a **Get Records** node that retrieves the record ID of the Catchlight Profile related to the Lead that triggered the Flow

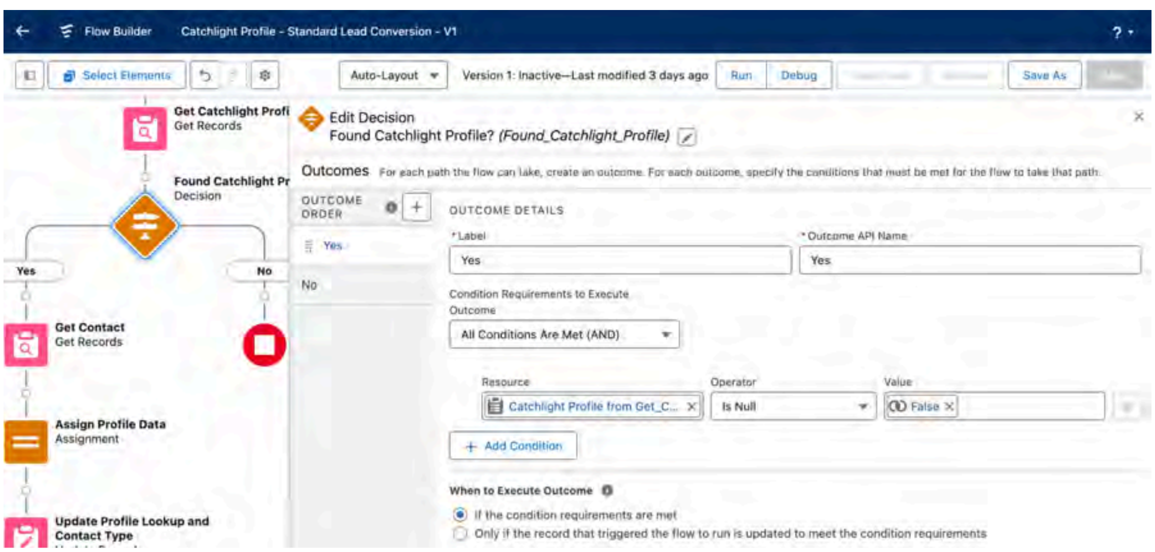


Found Catchlight Profile? Node

- Click **Edit Element** to view the details of the node



- Found Catchlight Profile? is a **Decision** node that checks if the Lead has an associated Catchlight Profile. If there is, the flow will continue. If there is not, the flow will end and a regular lead conversion will occur.



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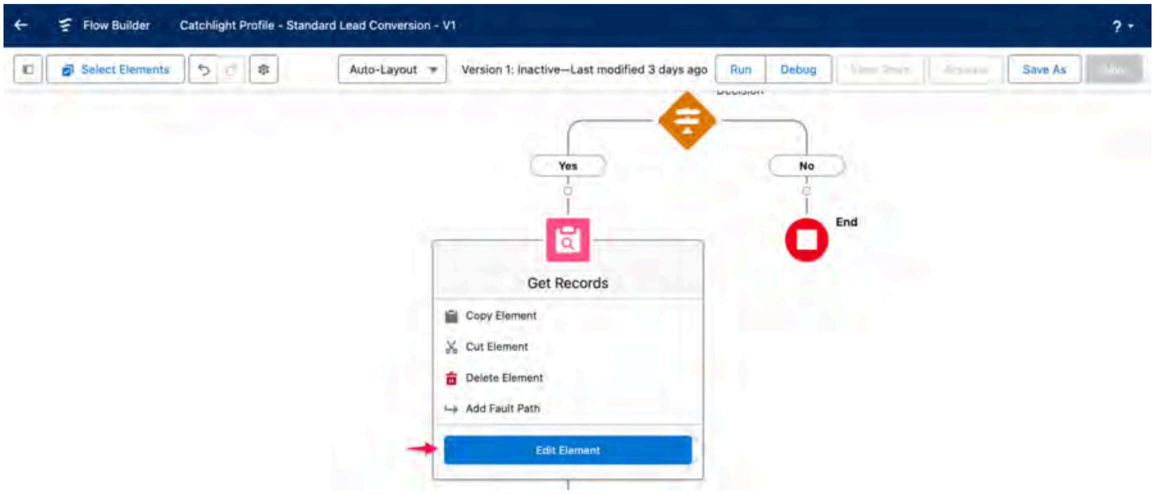
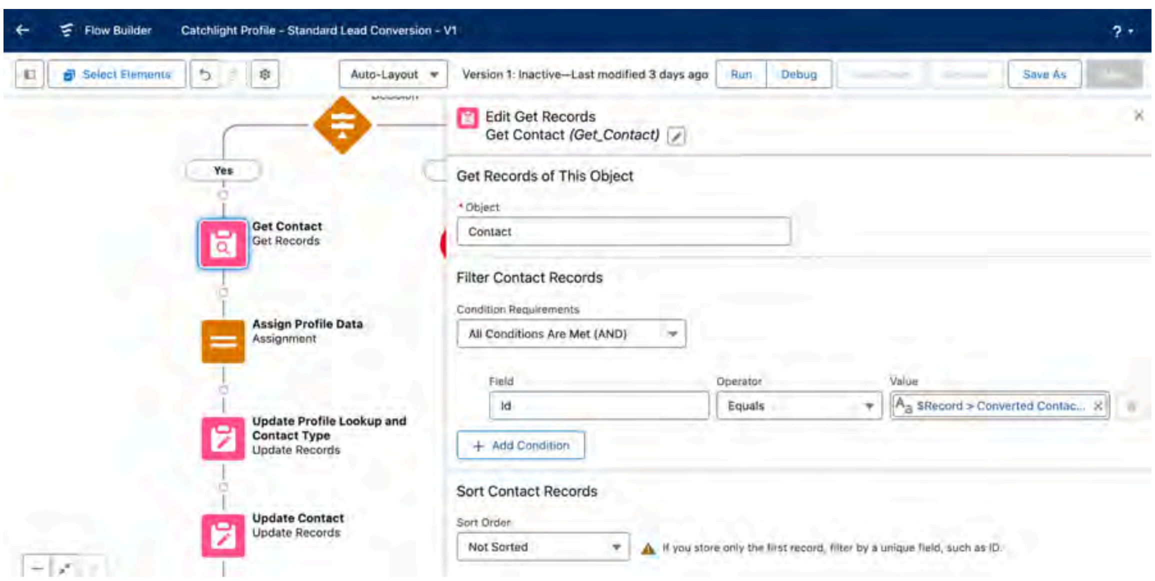
Get Contact Node

- Click **Edit Element** to view the details of the node

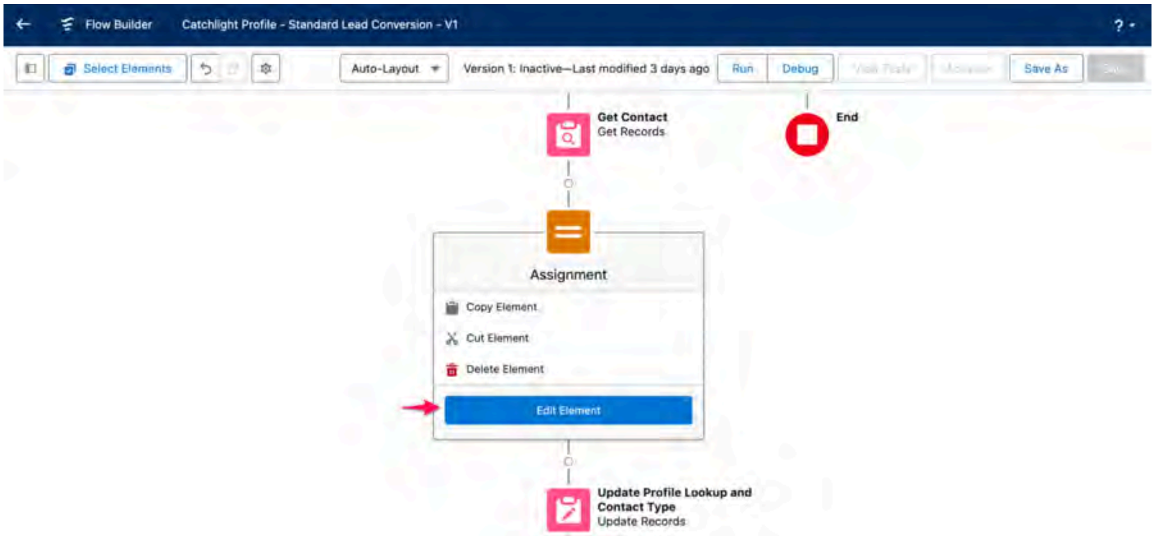


- Get Contact is a **Get Records** node that retrieves the record ID of the newly-created Contact

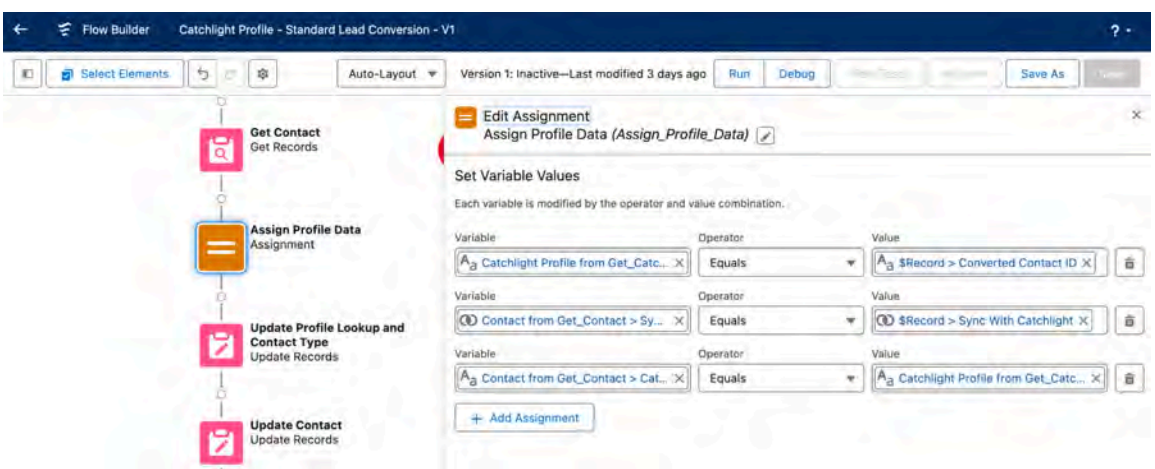


Assign Profile Data Node

- Click **Edit Element** to view the details of the node

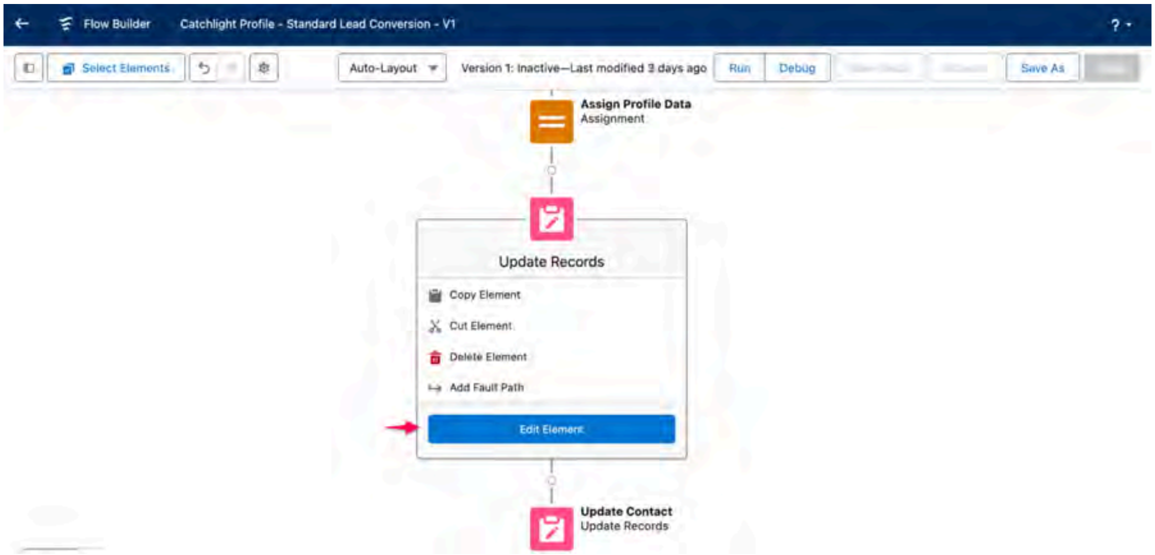


- Assign Profile Data is an **Assignment** node. It assigns the following values to the following fields: 1. Assigns the converted Contact record ID to the Contact lookup field on the Catchlight Profile record, 2. Assigns the Sync with Catchlight field on the converted Contact to be True, 3. Assigns the Catchlight Profile record ID to the Catchlight Profile lookup field on the converted Contact record.

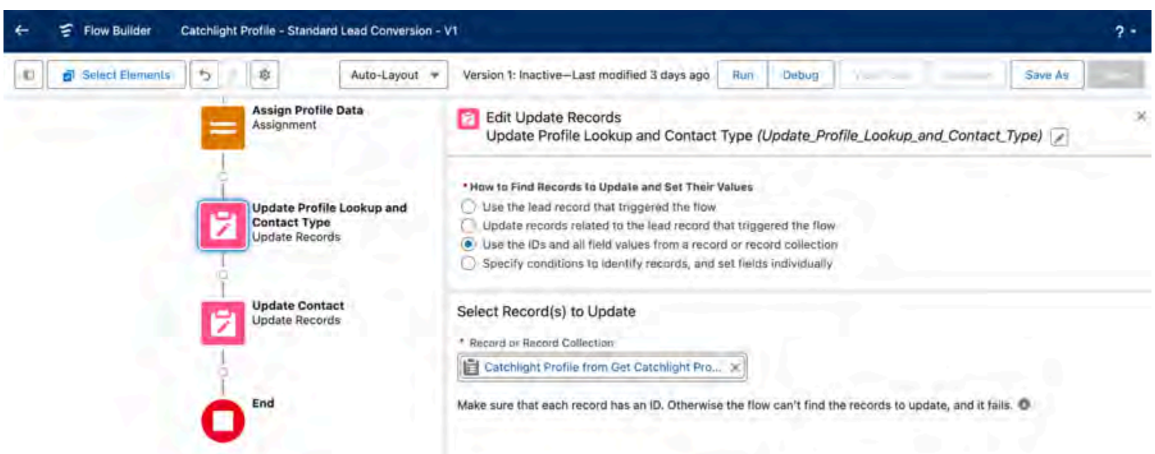


Update Profile Lookup and Contact Type Node

- Click **Edit Element** to view the details of the node

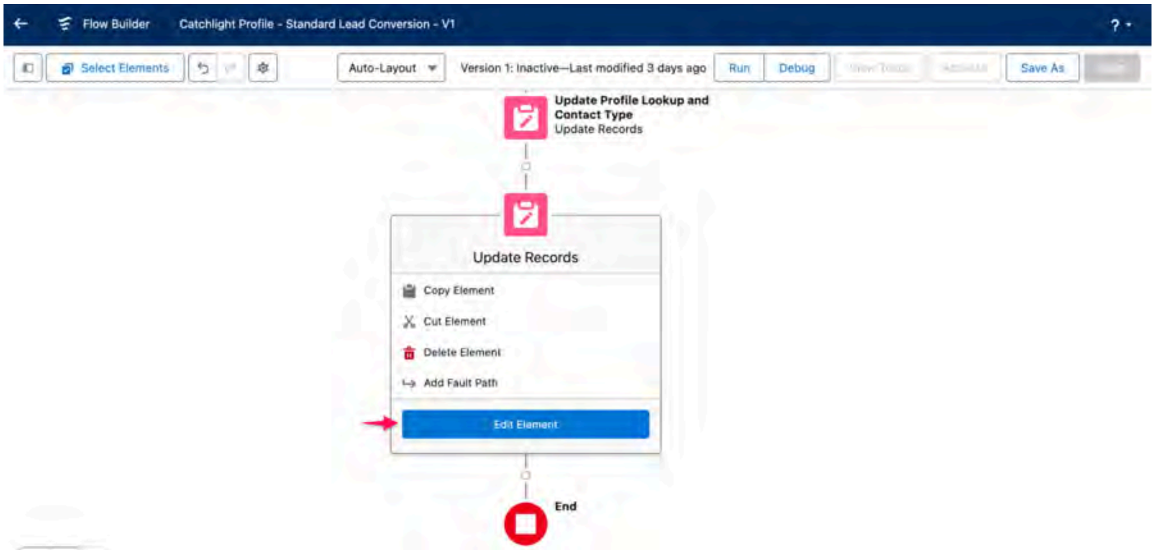


- Update Profile Lookup and Contact Type is an **Update Records** node. This node takes the assignments from the previous node and saves them down to the Catchlight Profile record.

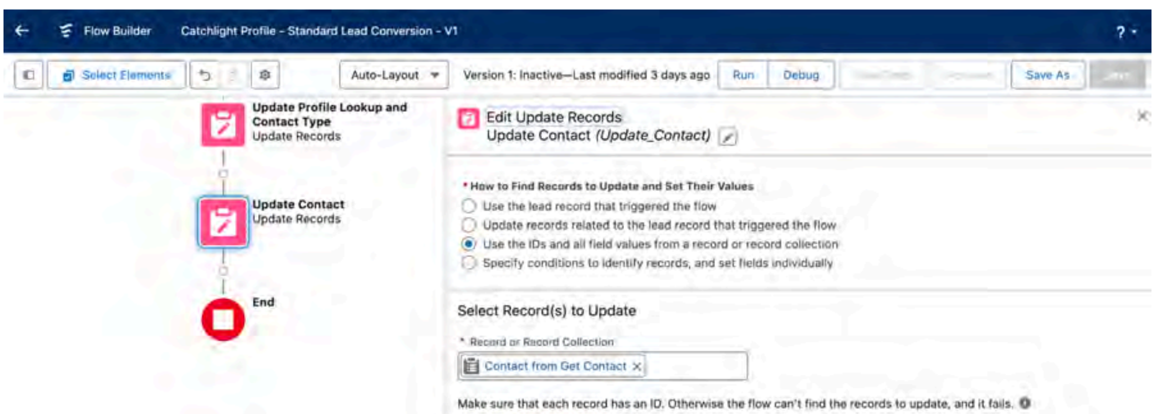


Update Contact Node

- Click **Edit Element** to view the details of the node



- Update Contact is an **Update Records** node. This node takes the assignments from the previous node and saves them down to the Contact record.

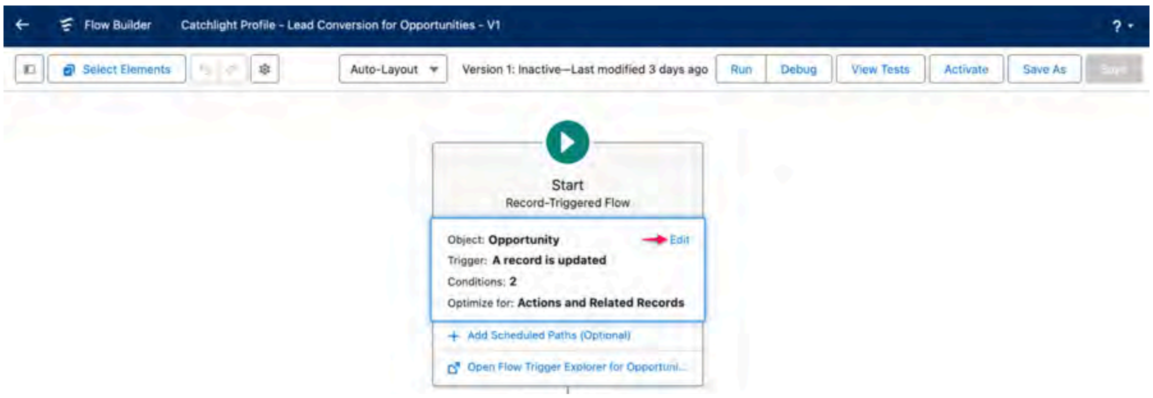


Lead Conversion for Opportunities

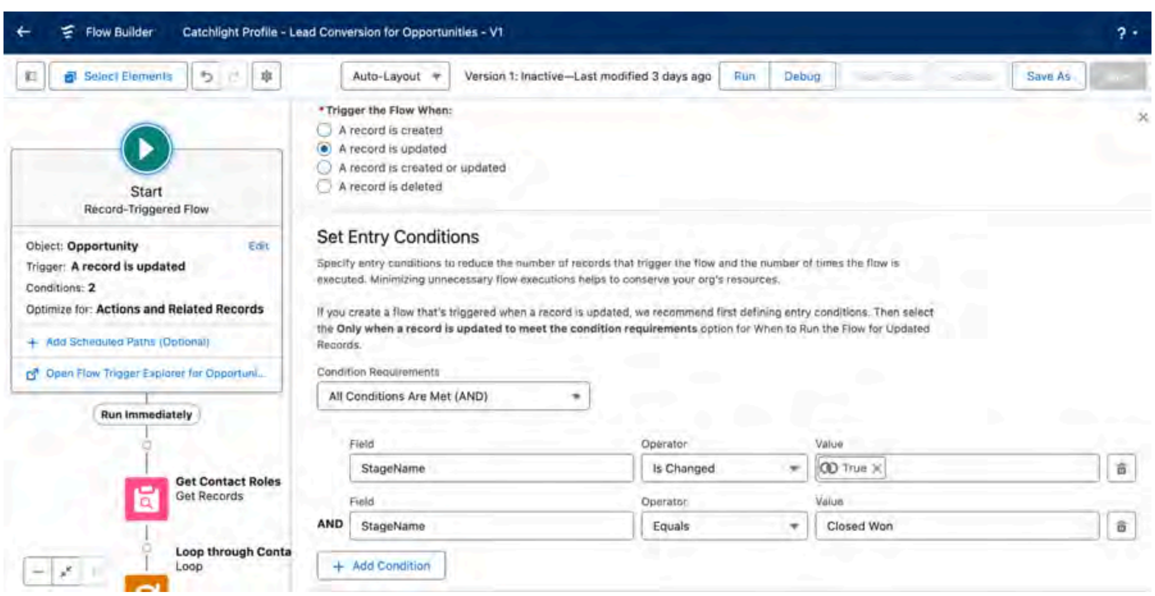
This Flow is triggered when an Opportunity is marked as Closed-Won. It loops through the Contacts and changes the Contact Type of each Catchlight Profile from “Lead” to “Client”.

Start Node

- Click **Edit** to view the details of the node

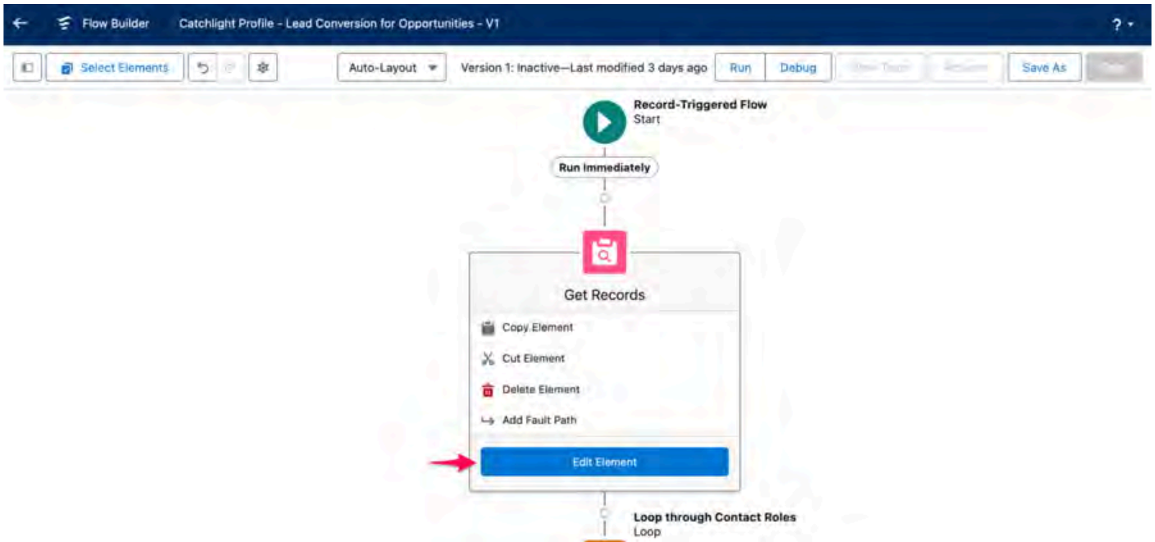


- The Flow is fired off the Opportunity object. It is triggered every time a record is updated and meets the condition requirements.

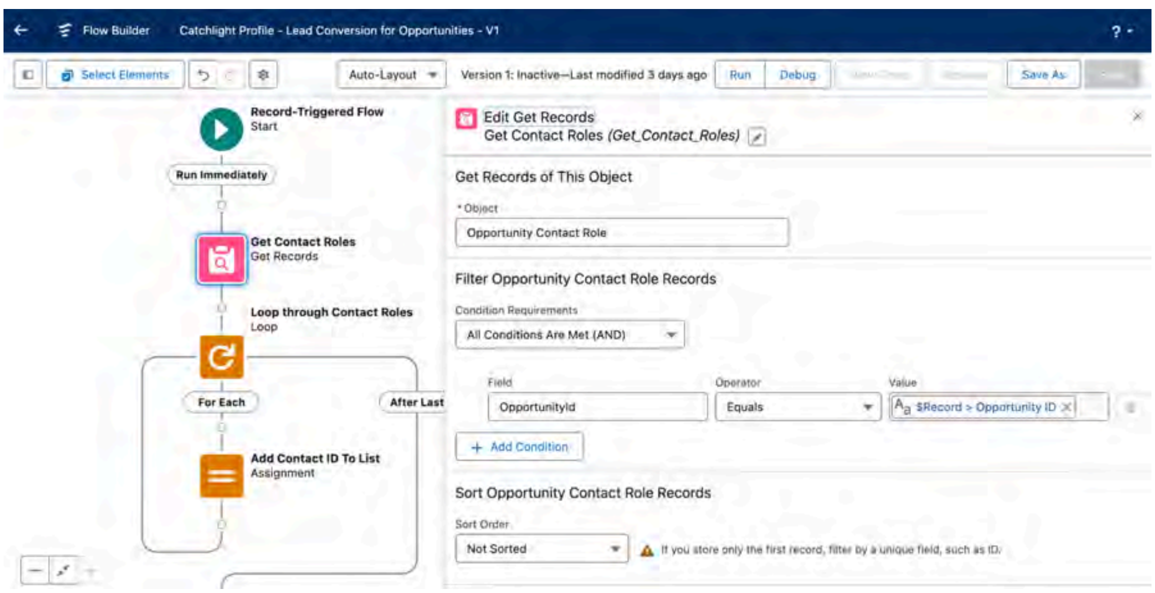


Get Contact Roles Node

- Click **Edit Element** to view the details of the node

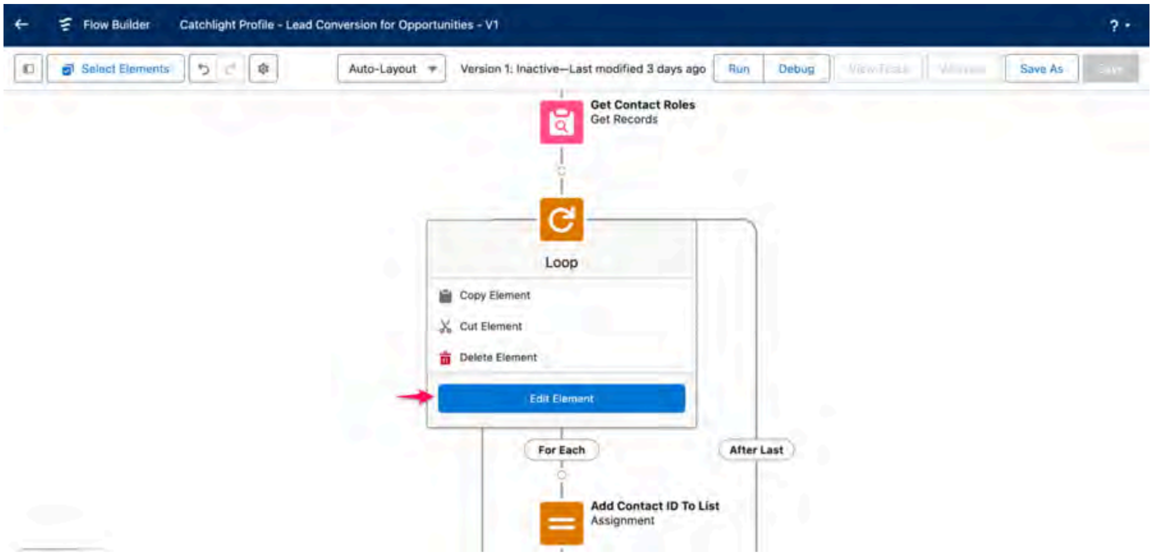


- Get Contact Roles is a **Get Records** node that retrieves the record IDs of the associated Contact Roles of the Opportunity

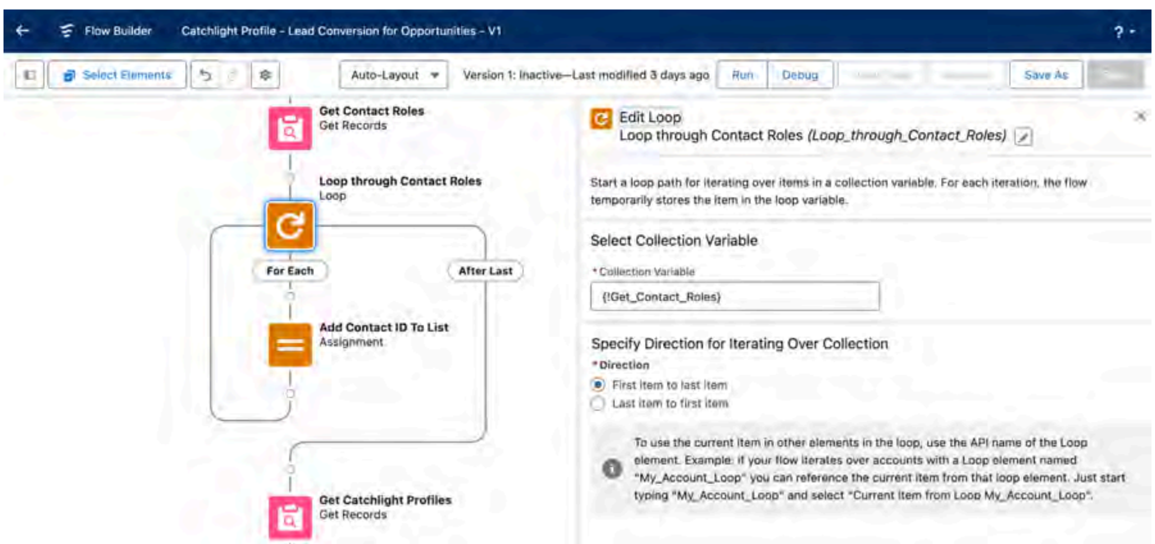


Loop through Contact Roles Node

- Click **Edit Element** to view the details of the node

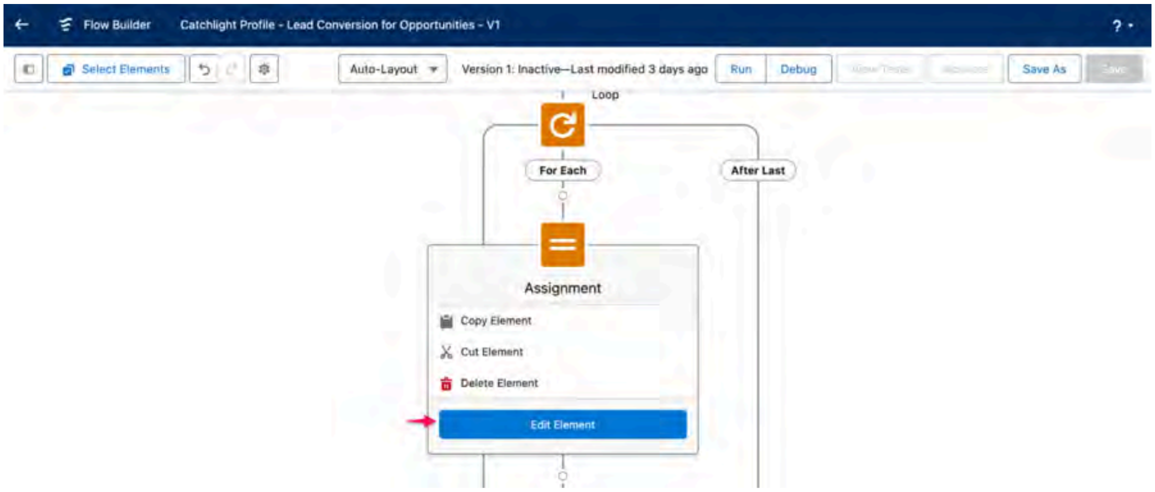


- Loop through Contact Roles is a **Loop** node that takes Contacts from the previous node and applies all actions in the For Each path

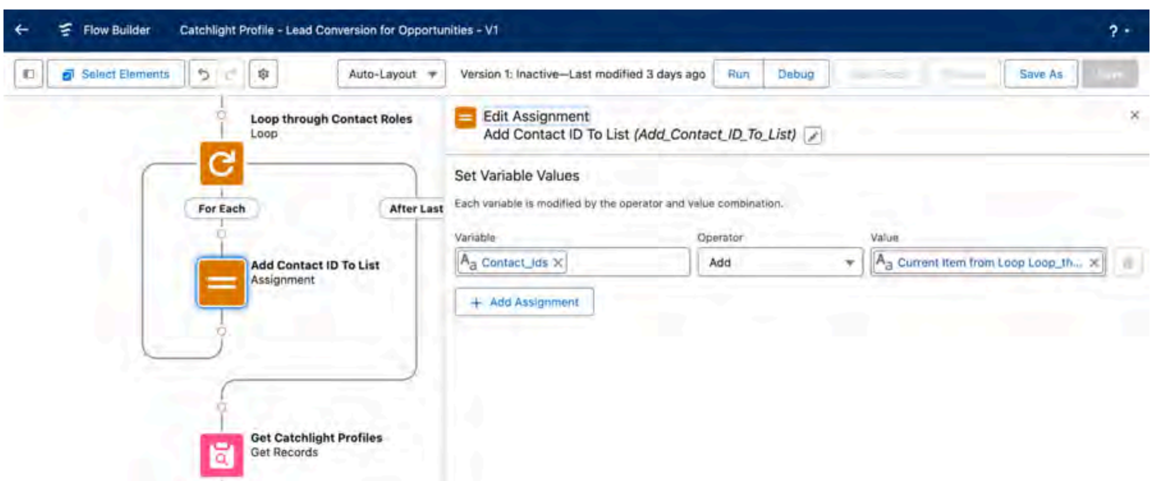


Add Contact ID to List Node

- Click **Edit Element** to view the details of the node

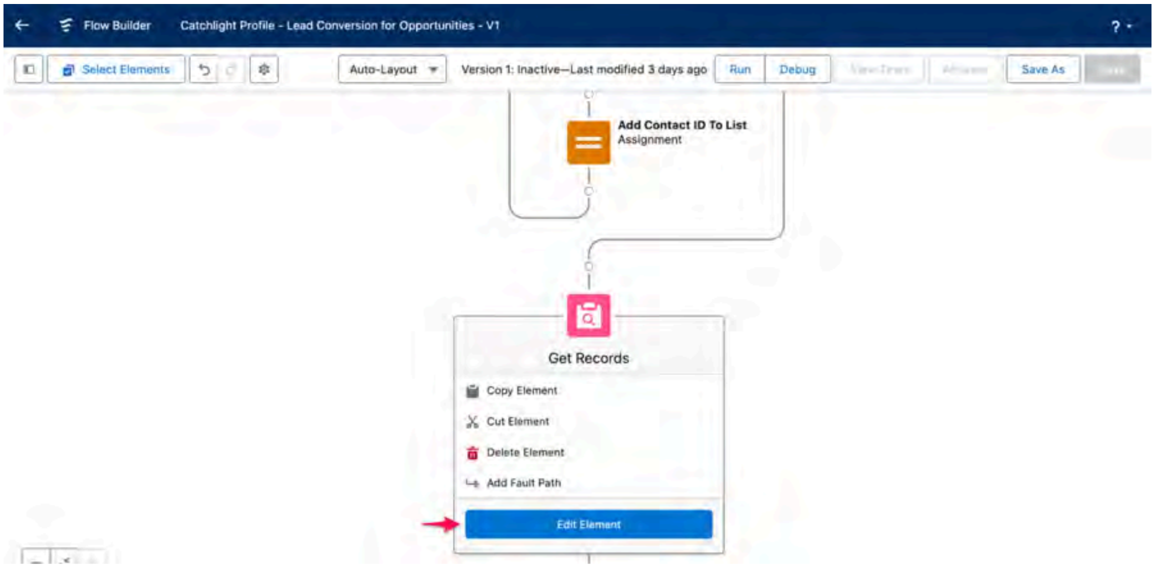


- Add Contact ID to List is an **Assignment** node in the For Each path of the previous Loop node that saves the record ID of each associated Contact into a collection variable

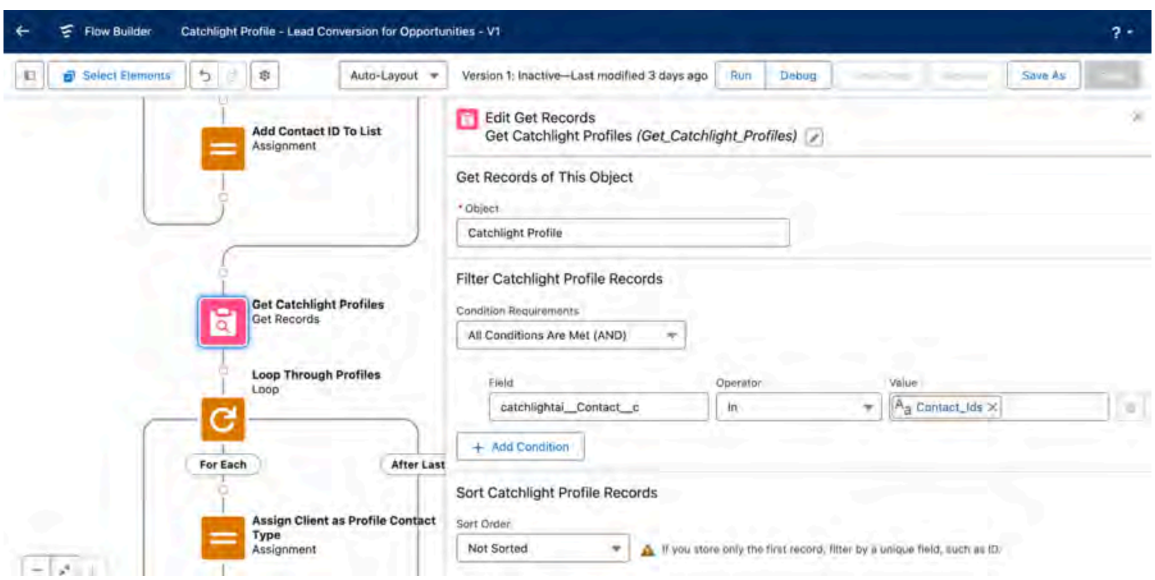


Get Catchlight Profiles Node

- Click **Edit Element** to view the details of the node

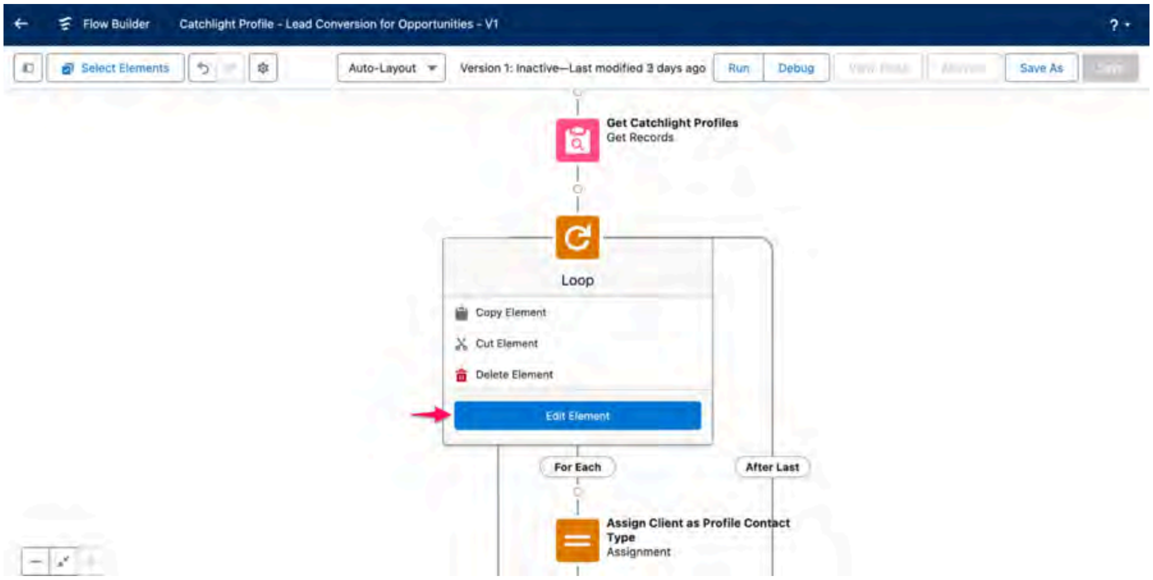


- Get Catchlight Profiles is a **Get Records** node that retrieves the record ID's of all associated Catchlight Profiles of Contacts in the collection variable

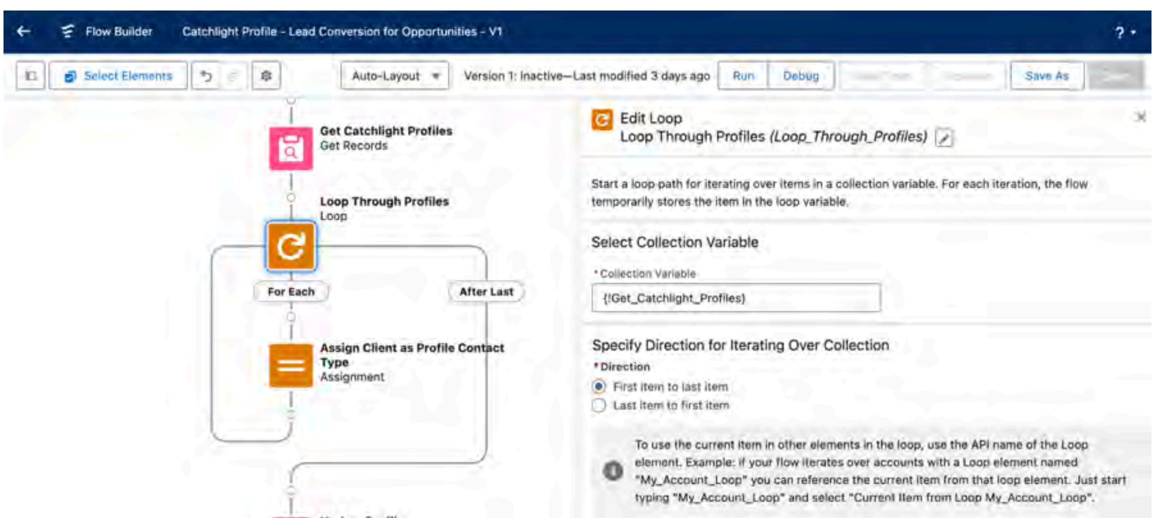


Loop Through Profiles Node

- Click **Edit Element** to view the details of the node

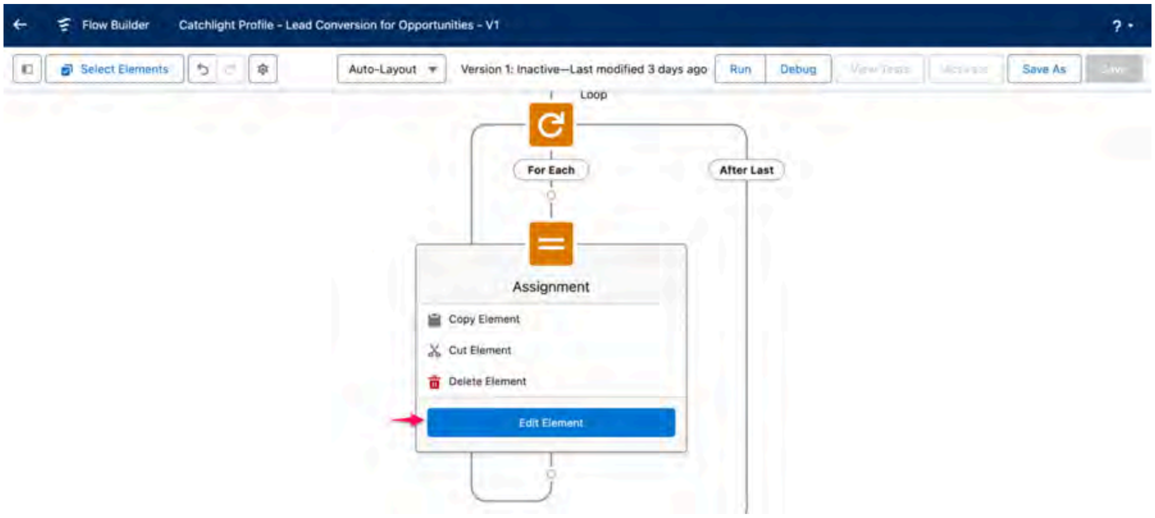


- Loop through Profiles is a **Loop** node that takes Catchlight Profiles from the previous node and applies all actions in the For Each path

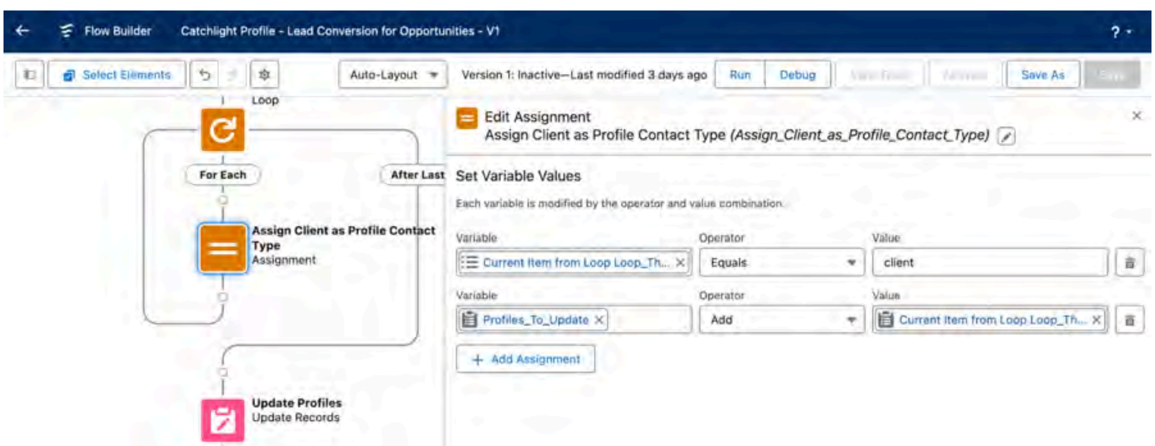


Assign Client as Profile Contact Type Node

- Click **Edit Element** to view the details of the node

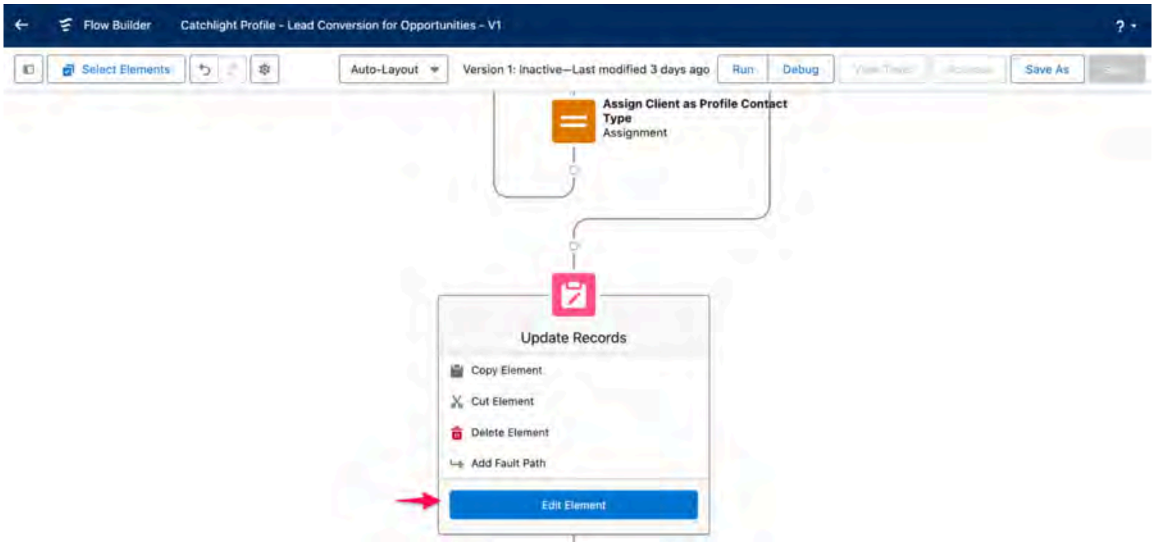


- Assign Client as Profile Contact Type is an **Assignment** node in the For Each path of the previous Loop node that assigns the Contact Type of each associated Catchlight Profile to "Client", and saves the record ID of the Catchlight Profile into a collection variable

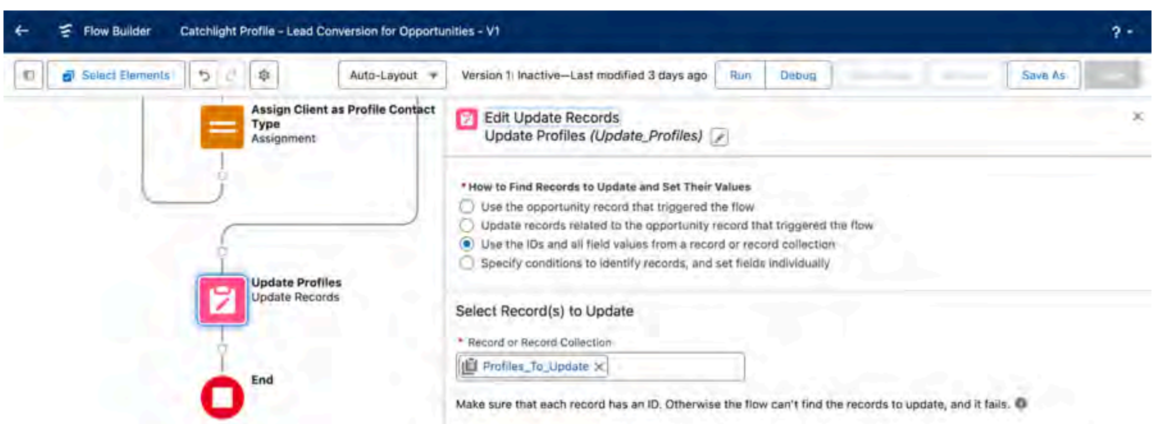


Update Profiles Node

- Click **Edit Element** to view the details of the node



- Update Profiles is an **Update Records** node. This node takes the assignments from the previous node and saves them down to the Catchlight Profile records in the collection variable from the previous loop.

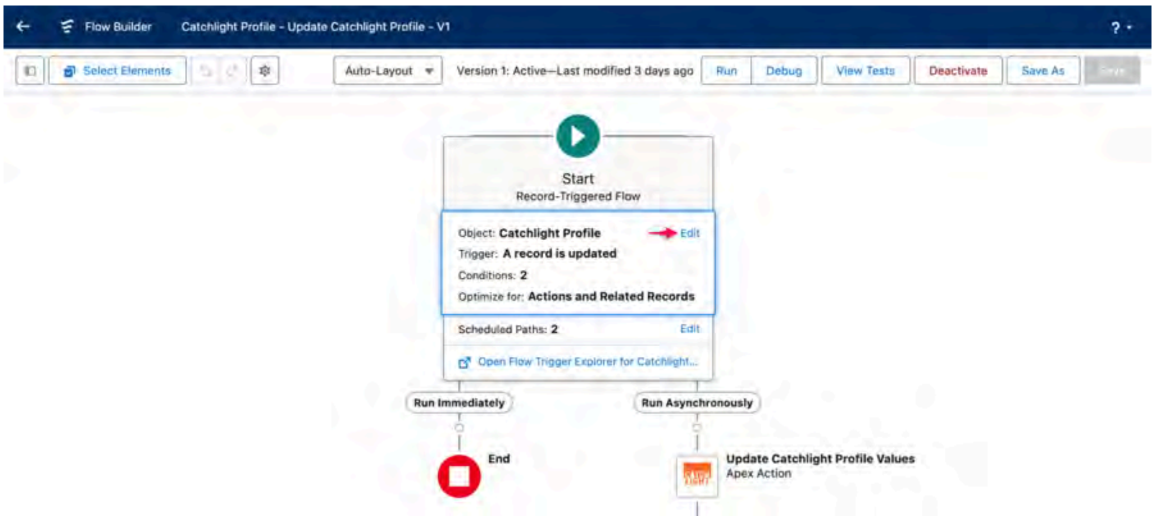


Update Catchlight Profile Flow

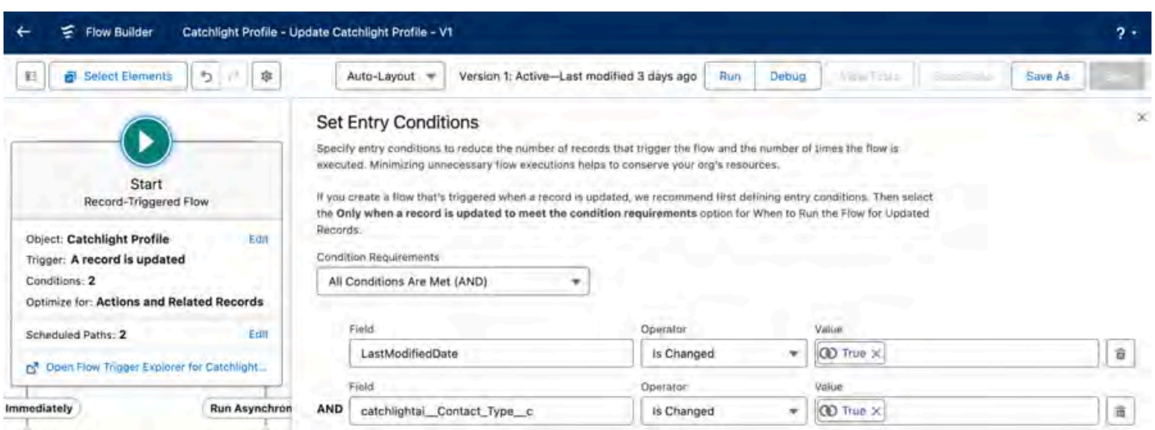
This Flow is triggered when a Catchlight Profile's Contact Type is changed from Lead to Client and vice versa. It utilizes the packaged Custom Property Editor to perform an Outbound sync.

Start Node

- Click **Edit** to view the details of the node

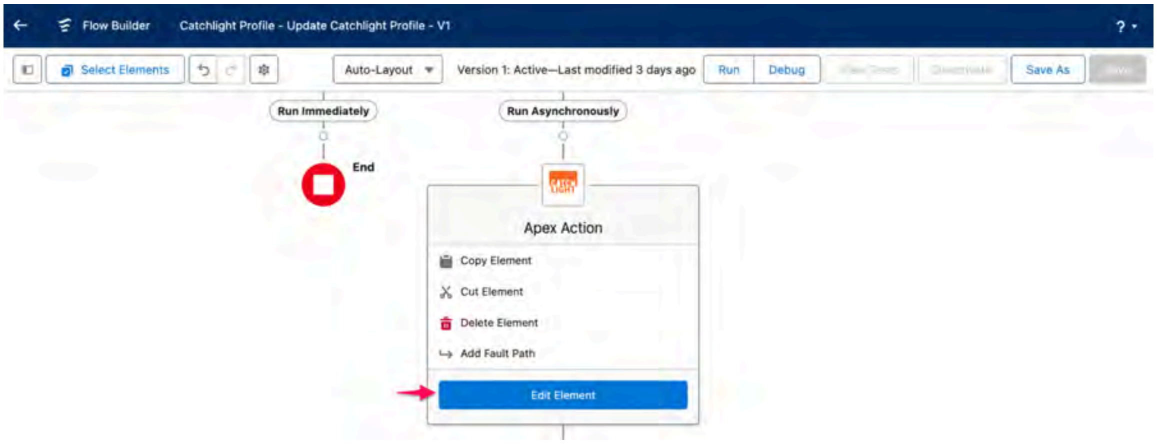


- The Flow is fired off the Lead object. It is triggered every time a record is updated and meets the condition requirements.

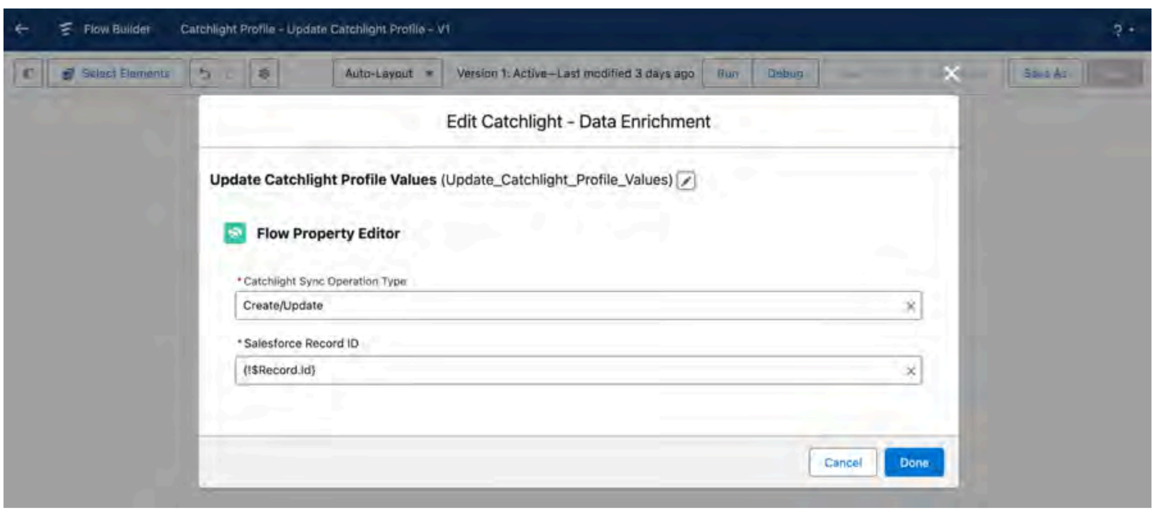


Update Catchlight Profile Values Node

- Click **Edit Element** to view the details of the node



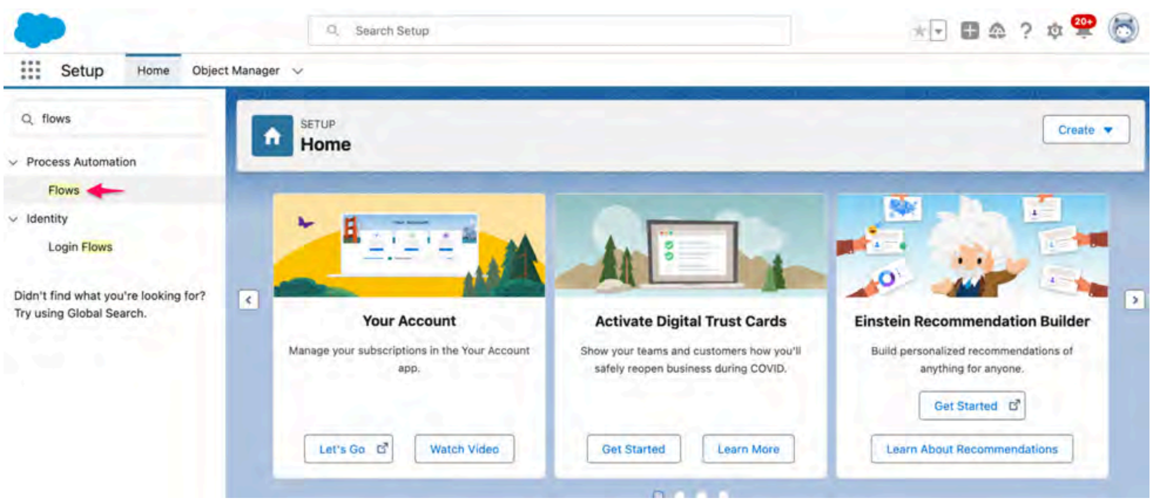
- Update Catchlight Profile Values is an **Apex Action** node with a **Custom Property Editor** that performs an Outbound Sync to Catchlight



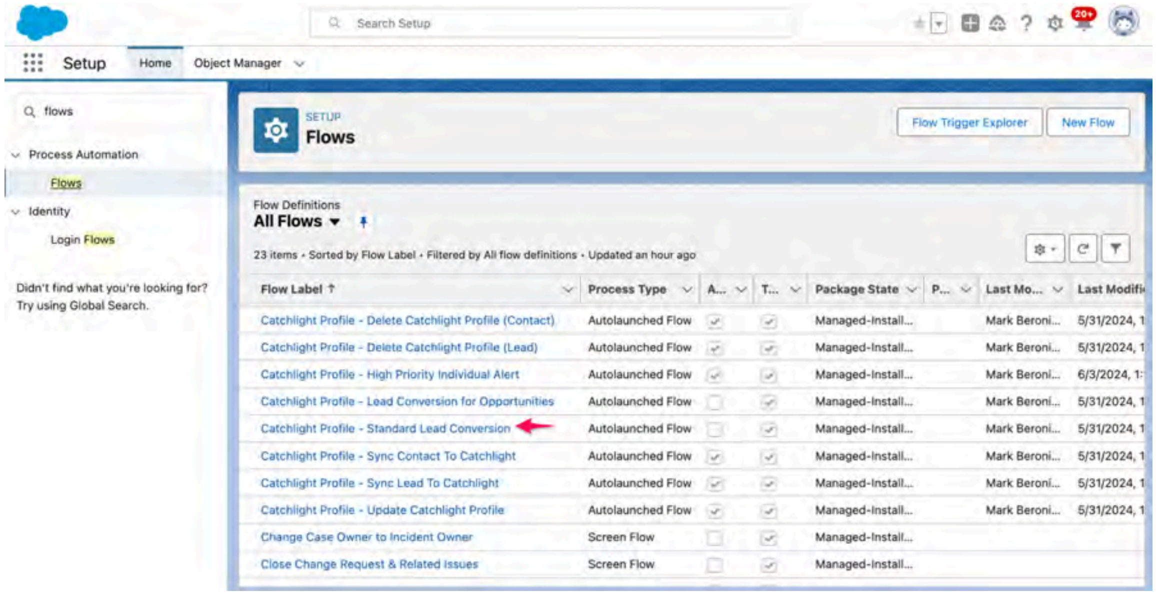
Activating the packaged Flows for your org

The Flows from V1 are the only packaged Flows that come Inactive out of the box. In order to align the lead conversion process with Catchlight's process, both of these flows will need to be activated. The following steps will guide you through activating the **Standard Lead Conversion Flow**, but you can follow the same steps for the **Lead Conversion for Opportunities** Flow

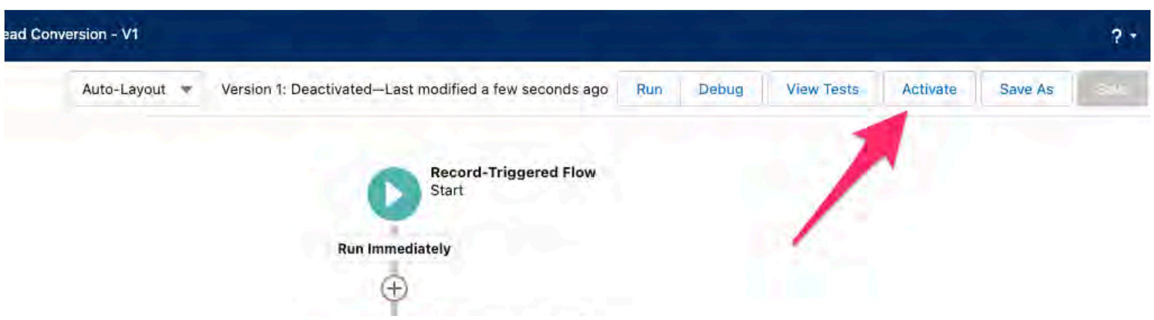
- Navigate to **Setup** > **Process Automation** > **Flows**



- Click **Catchlight Profile - Standard Lead Conversion**



- Click **Activate**



NOTE: These flows will work out-of-the-box in a Sales cloud org, so the admin does not need to configure these flows provided in the package.

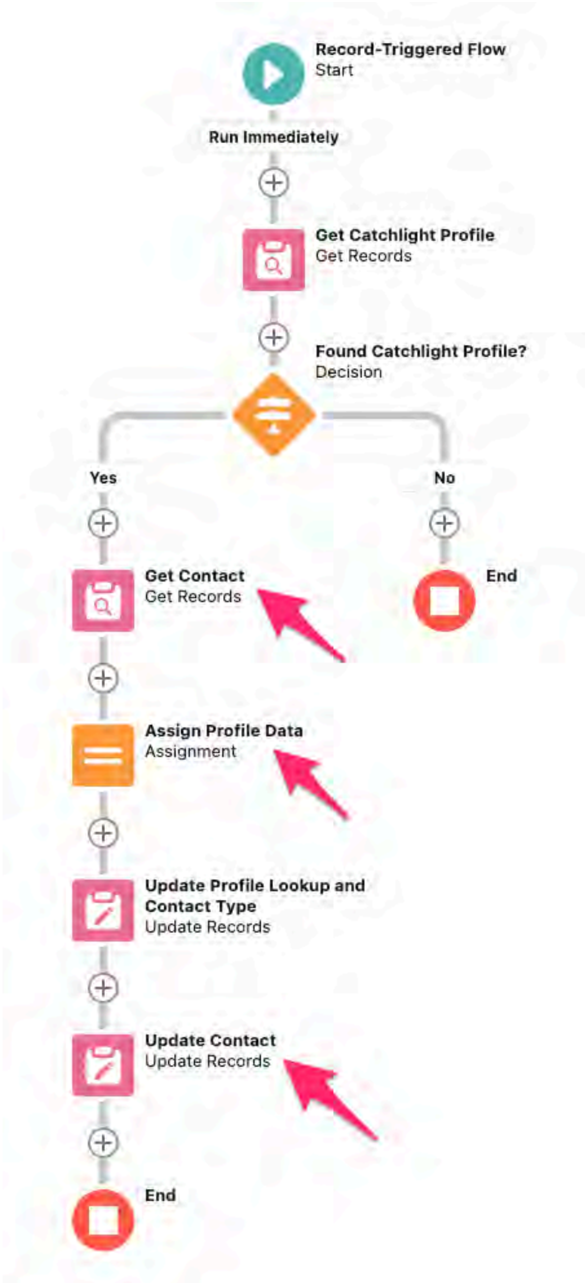
Remember: Both of these Flows need to be activated in order to successfully complete the Lead Conversion process and have it reflected in Catchlight!

Configuring the packaged Lead Conversion Flows for your FSC org with Person Accounts

In order to successfully complete the lead conversion process in a Financial Services Cloud org, the **Standard Lead Conversion** Flow must be cloned and changed to reflect the use of Person Accounts. This is due to how lead conversion works when Person Accounts are enabled, which will convert a Lead into a Person Account instead of a Contact.

- Refer to these helpful links for Flows in Salesforce
  - Salesforce Help: Flows and Processes
  - Trailhead: Build Flows with Flow Builder

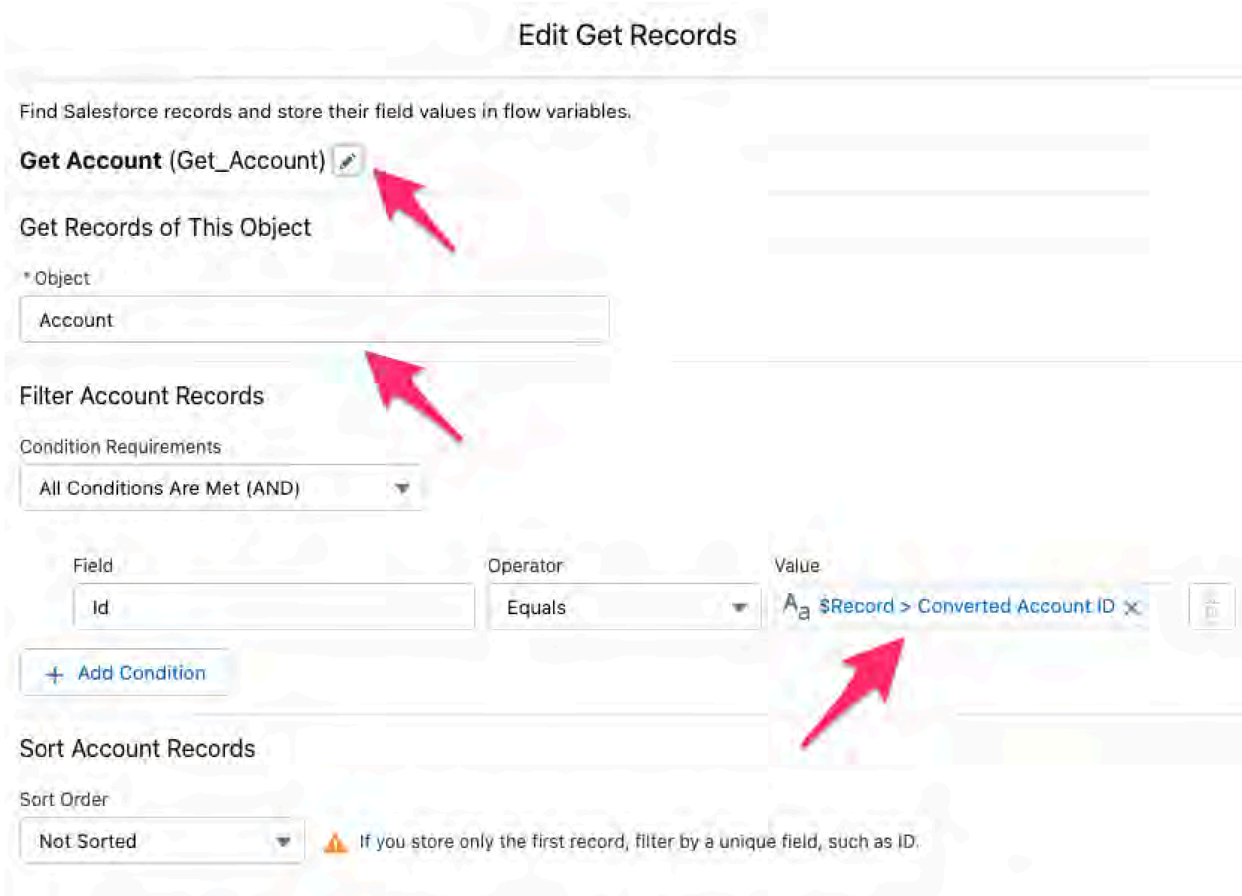
- This is the **Standard Lead Conversion** Flow



- This is the **Standard Lead Conversion (Account)** Flow, which is cloned and edited from the previous Flow

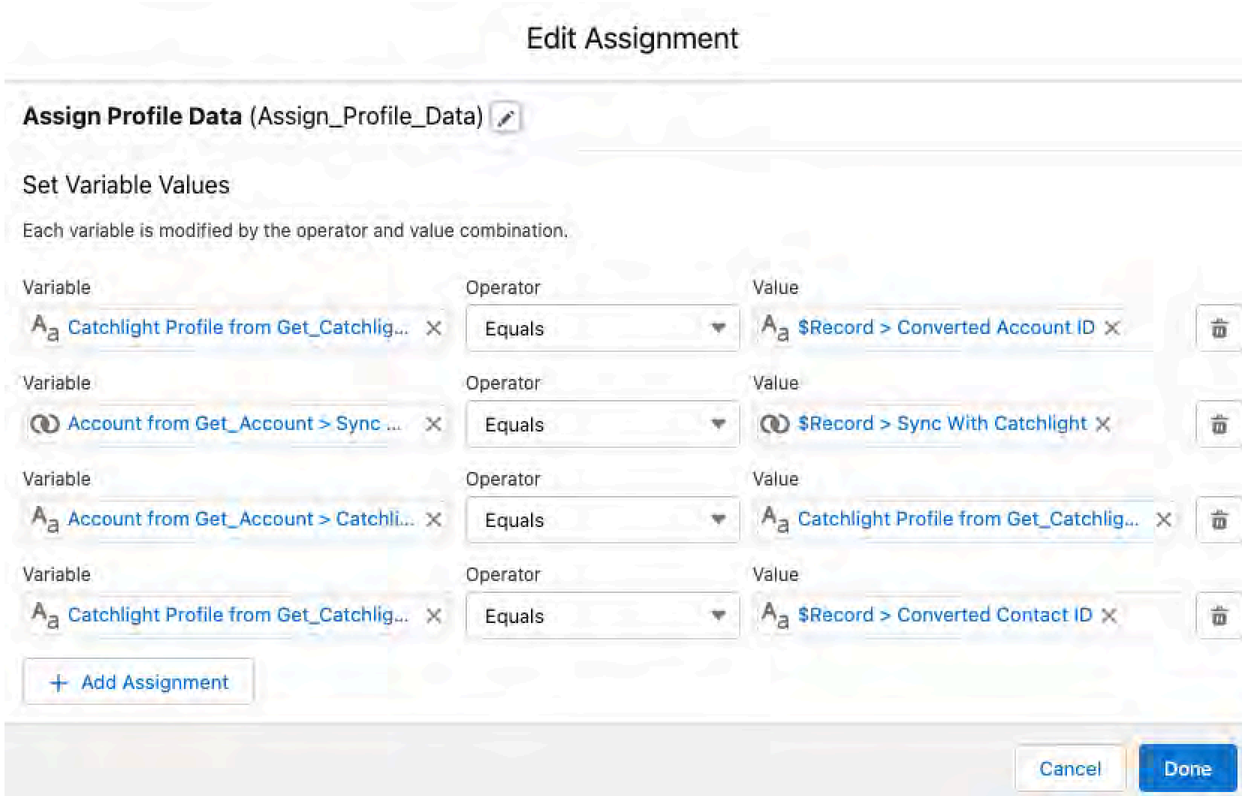
In the flow template, we will be modifying these three nodes. We will start with the Get Contact node.

Get Account



- Rename Get Contact to **Get Account**
- In the Object field select **Account** instead of Contact
- Modify the value field in the Condition Requirements to be **{!$Record.ConvertedAccountId}**

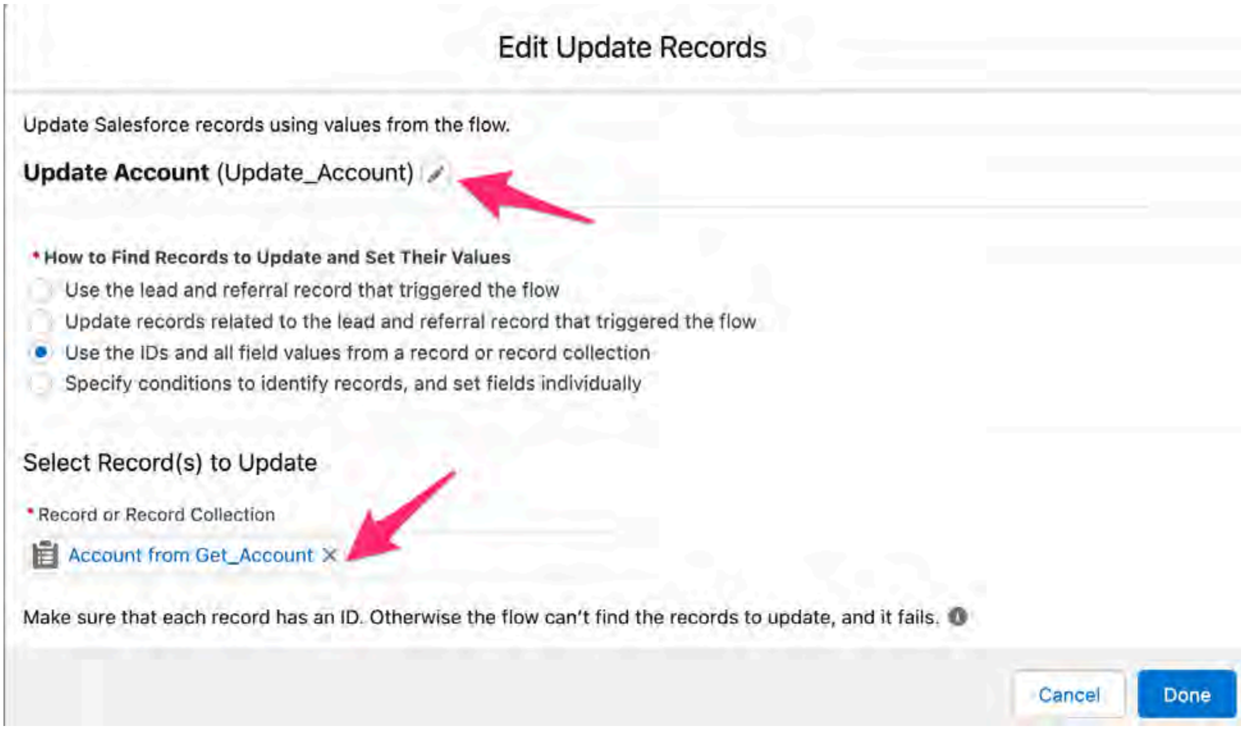
Assign Profile Data



We will now assign the necessary profile data for the Account object.

- Assignment 1: **{!Get_Catchlight_Profile.Account__c}** = **{!$Record.ConvertedAccountId}**
- Assignment 2: **{!Get_Account.catchlight__Sync_With_Catchlight__pc}** = **{!$Record.catchlight__Sync_With_Catchlight__c}**
- Assignment 3: **{!Get_Account.catchlight__Catchlight_Profile__pc}** = **{!Get_Catchlight_Profile.Id}**
- Assignment 4: **{!Get_Catchlight_Profile.catchlight__Contact__c}** = **{!$Record.ConvertedContactId}**

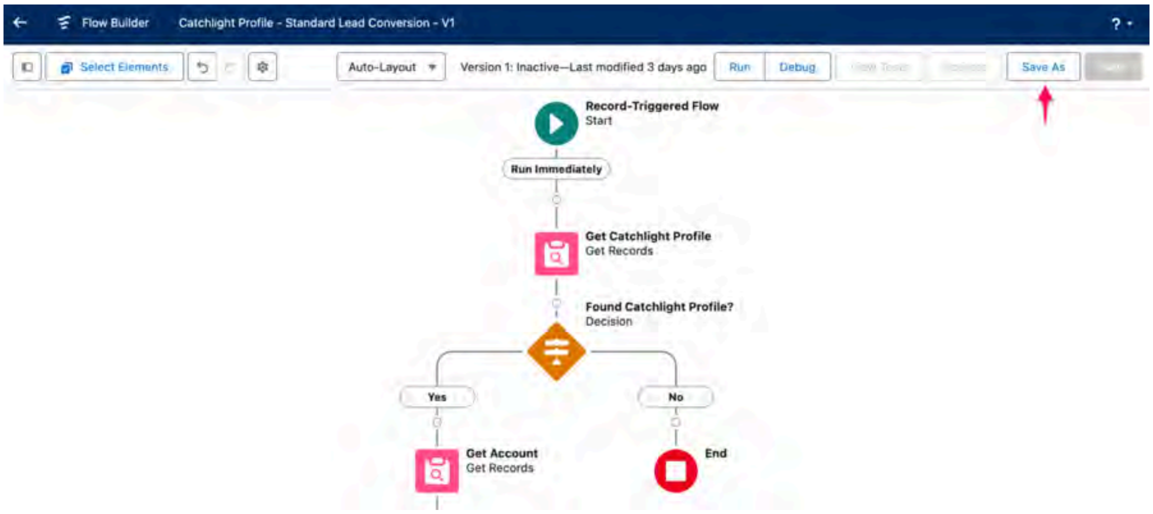
Update Account



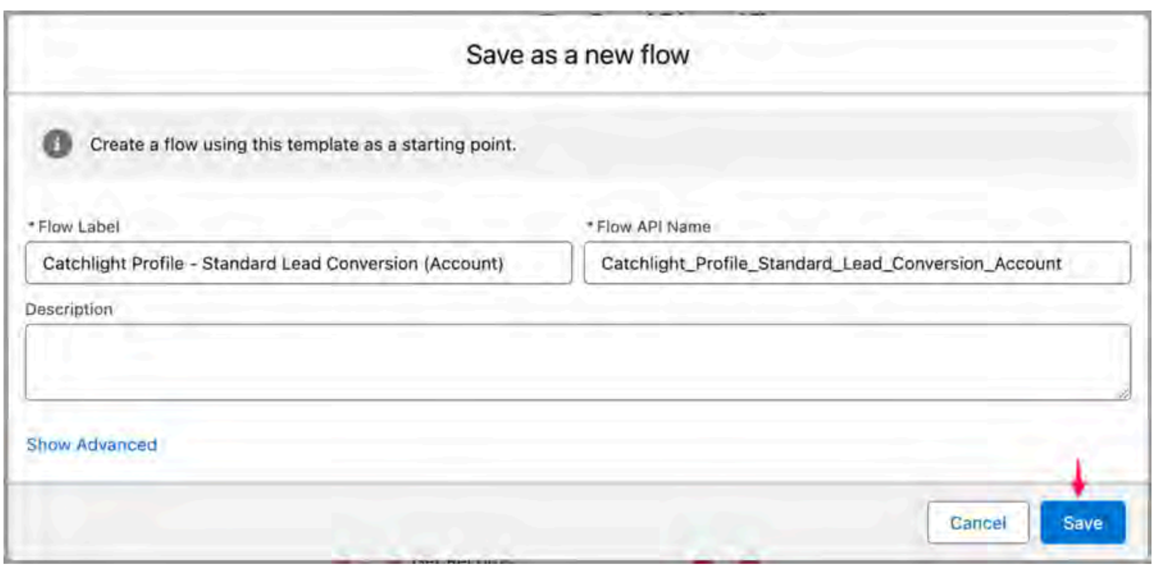
- **Step 1**: Click the pencil icon next to the rename the Update Contact node to **Update Account**
  - API Name: **Update_Account**
- **Step 2:** Select the Account from Get Account
  - {!Get_Account}

To finish the process of saving and activating this new Lead Conversion Flow for Person Accounts,

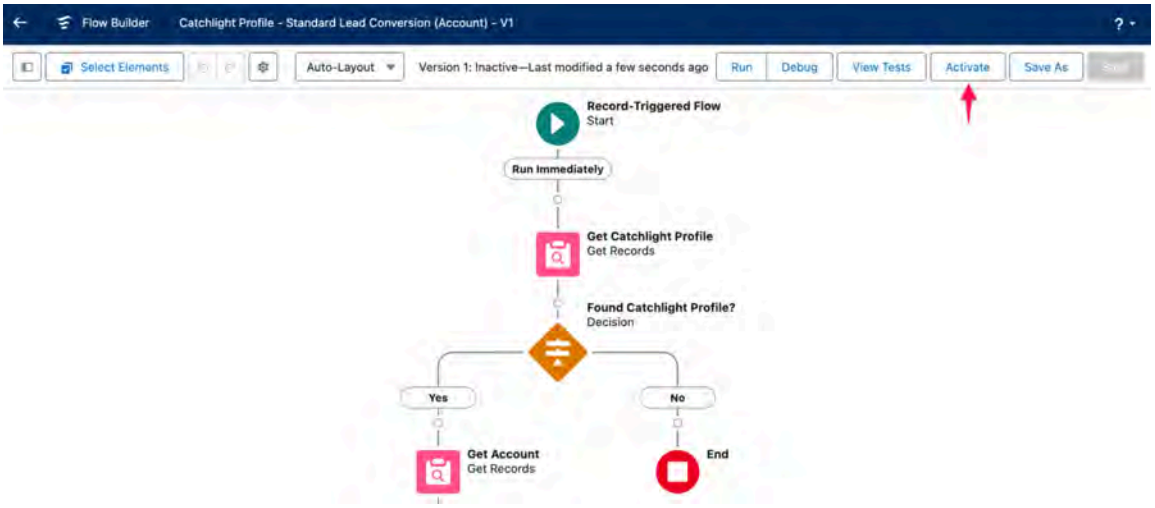
- Click **Save As**



- Enter Enter Flow Label
    - **Catchlight Profile - Standard Lead Conversion (Account)**
- Click **Save**



- Click **Activate**



NOTE: The Account object must be mapped in the Data Mapper step. The "Person Account" Record Type has to be selected in the Salesforce Record Type field. In V2 of the app, the Person Account Data Mapping will automatically be created after installation is complete. The Catchlight Profile - Lead Conversion for Opportunities Flow will still have to be activated but does not need to be modified.

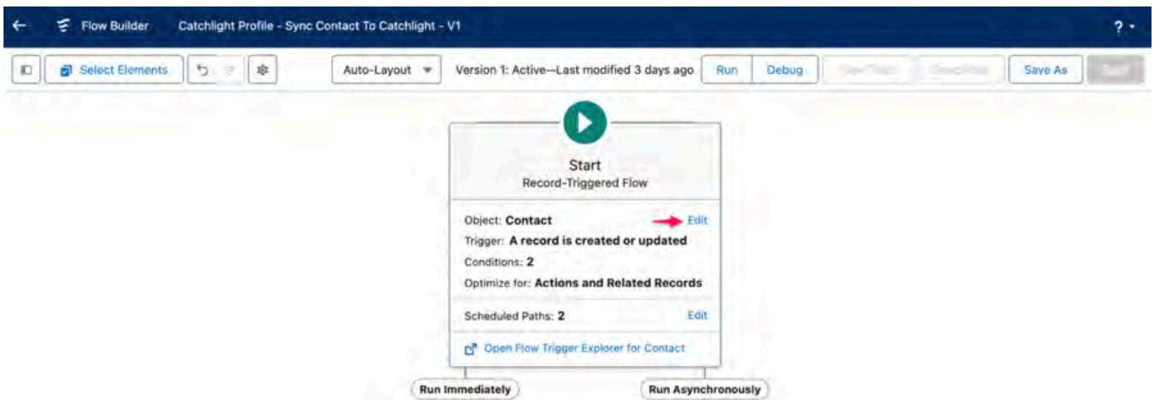
Added In V2 - Create/Edit Sync Flows

Sync Contact to Catchlight Flow

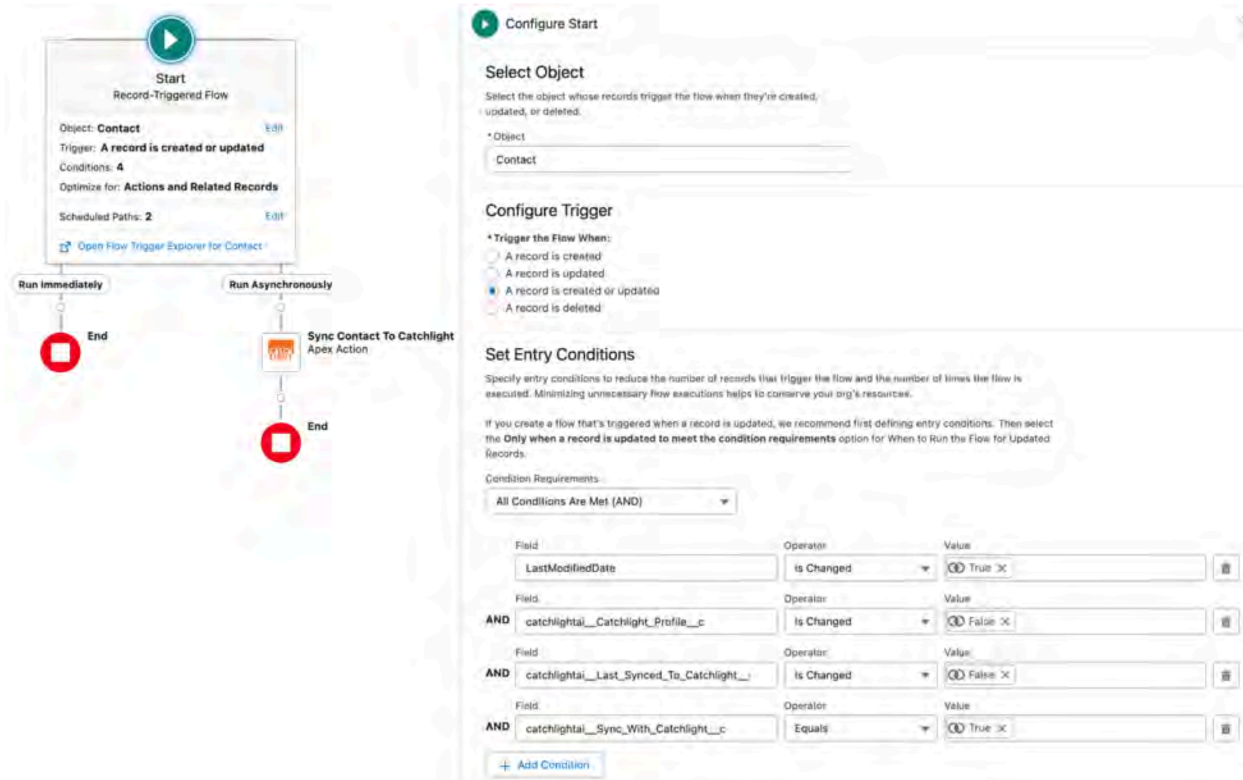
This Flow is triggered when a Contact is created or updated, and the Sync with Catchlight checkbox is set to True. It utilizes the packaged Custom Property Editor to perform an Outbound sync.

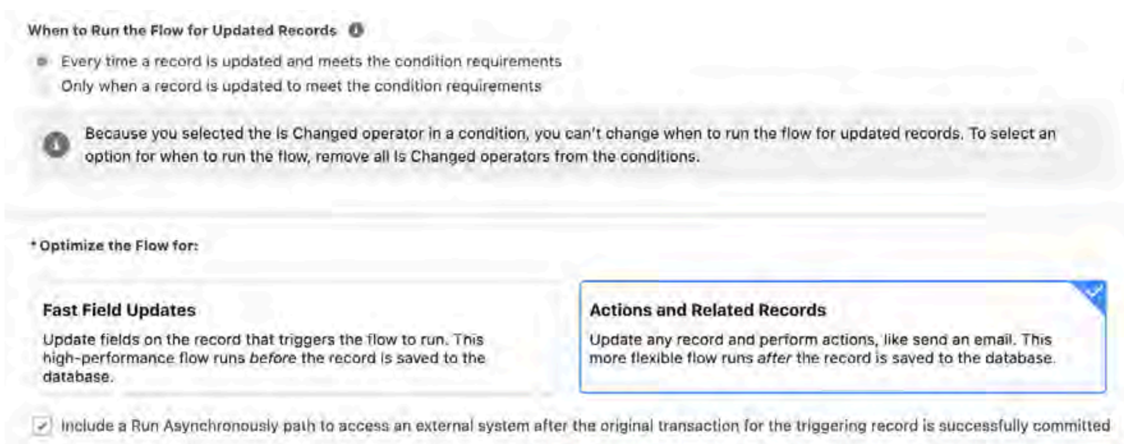
Start Node

- Click **Edit** to view the details of the node



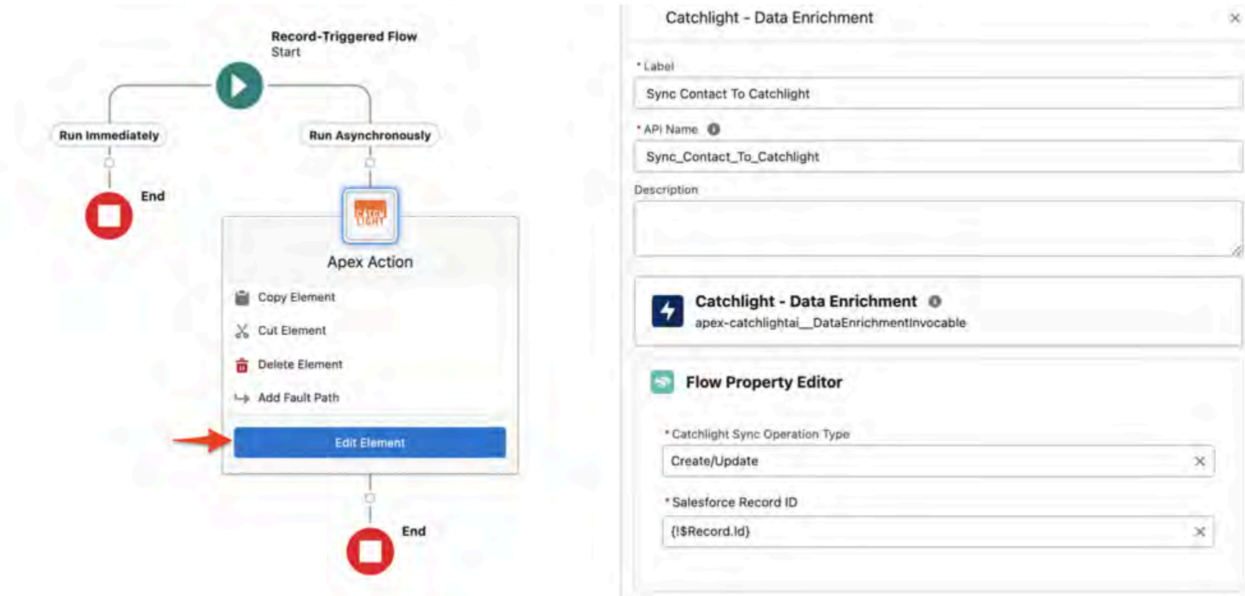
- The Flow is fired off the Contact object. It is triggered every time a record is updated and meets the condition requirements.



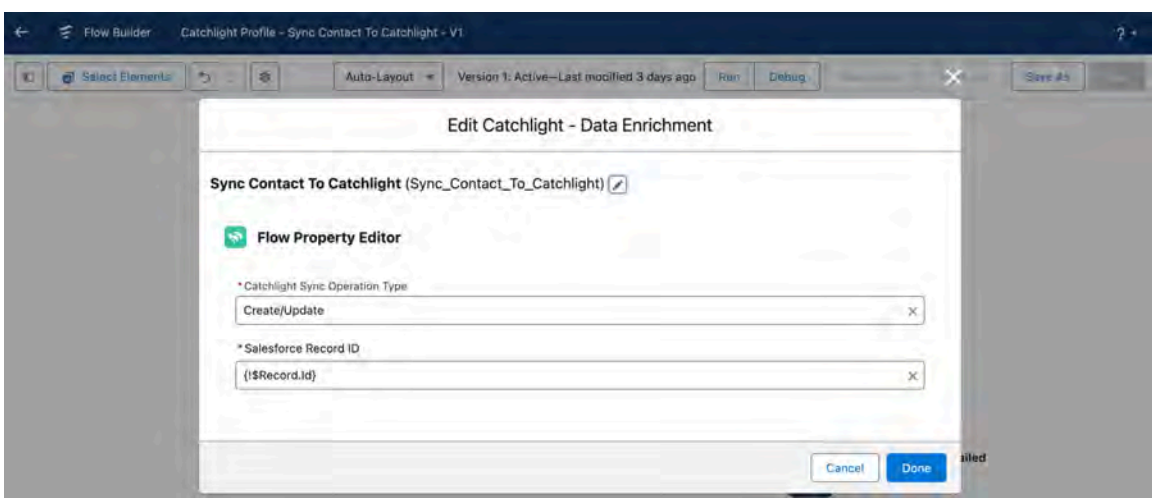


Sync Contact to Catchlight Node

- Click **Edit Element** to view the details of the node



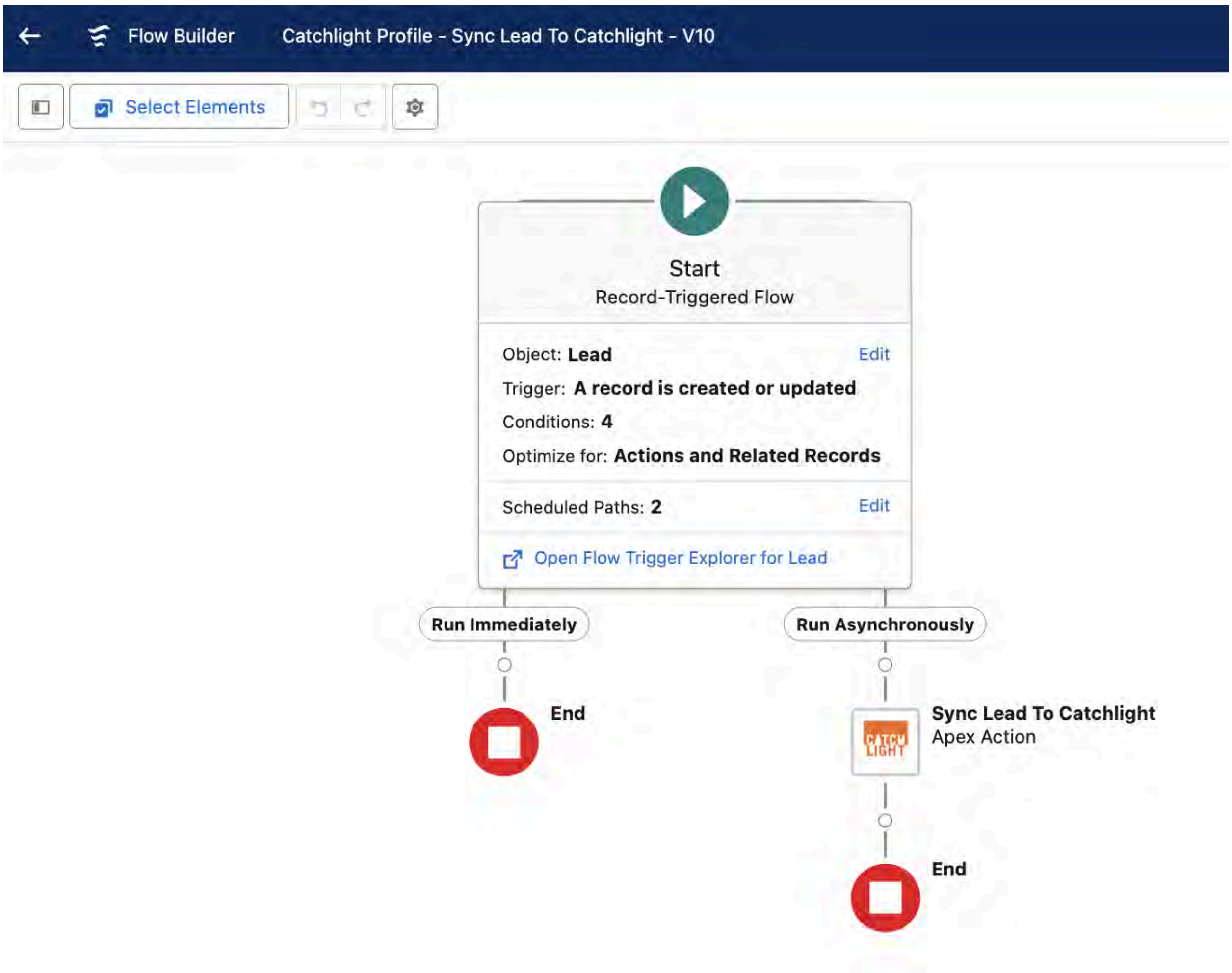
- Sync Contact to Catchlight is an **Apex Action** node with a **Custom Property Editor** that performs an Outbound Sync to Catchlight



Sync Lead to Catchlight Flow

This Flow is triggered when a Lead is created or updated, and the Sync with Catchlight checkbox is set to True. It utilizes the packaged Custom Property Editor to perform an Outbound sync.

The Flow shares the same structure as the Sync Contact to Catchlight Flow, with the trigger condition and sync adapted for the Lead Object.

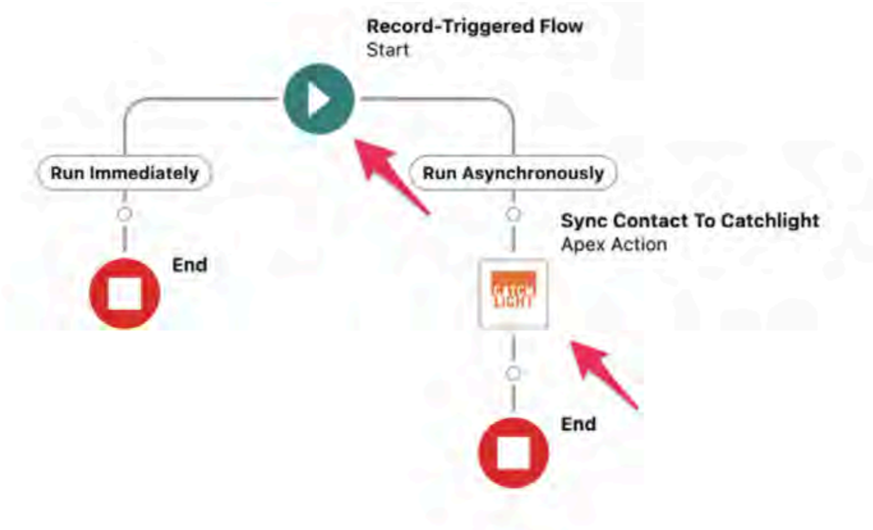


Configuring the packaged Create/Edit Sync Flows for your FSC org with Person Accounts

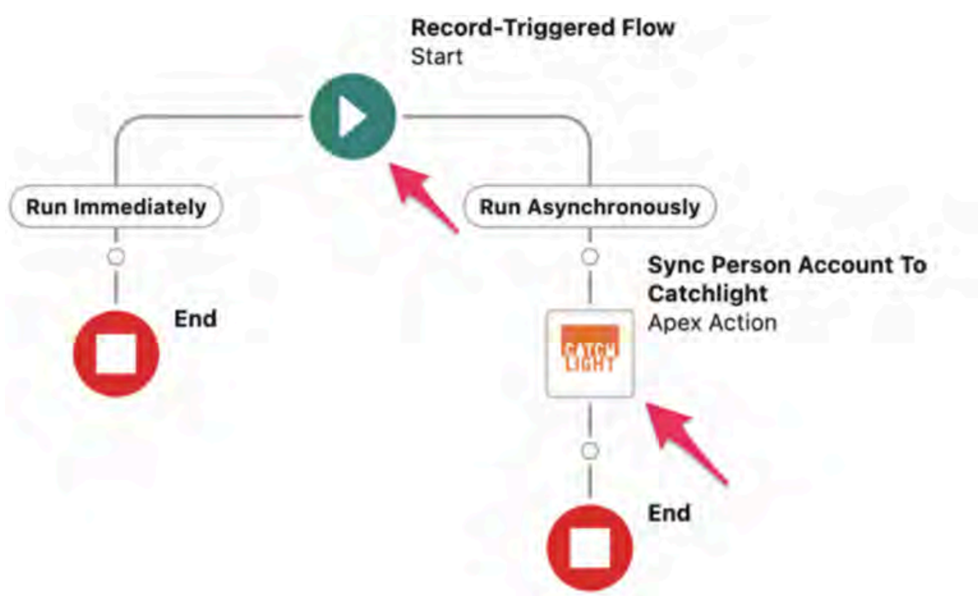
In order to successfully complete a sync with Person Accounts in a Financial Services Cloud org, either one of the **Create/Edit Sync** Flows must be cloned and changed to reflect the use of Person Accounts.

- Refer to these helpful links for Flows in Salesforce
  - Salesforce Help: Flows and Processes
  - Trailhead: Build Flows with Flow Builder

- This is the **Sync Contact to Catchlight** Flow

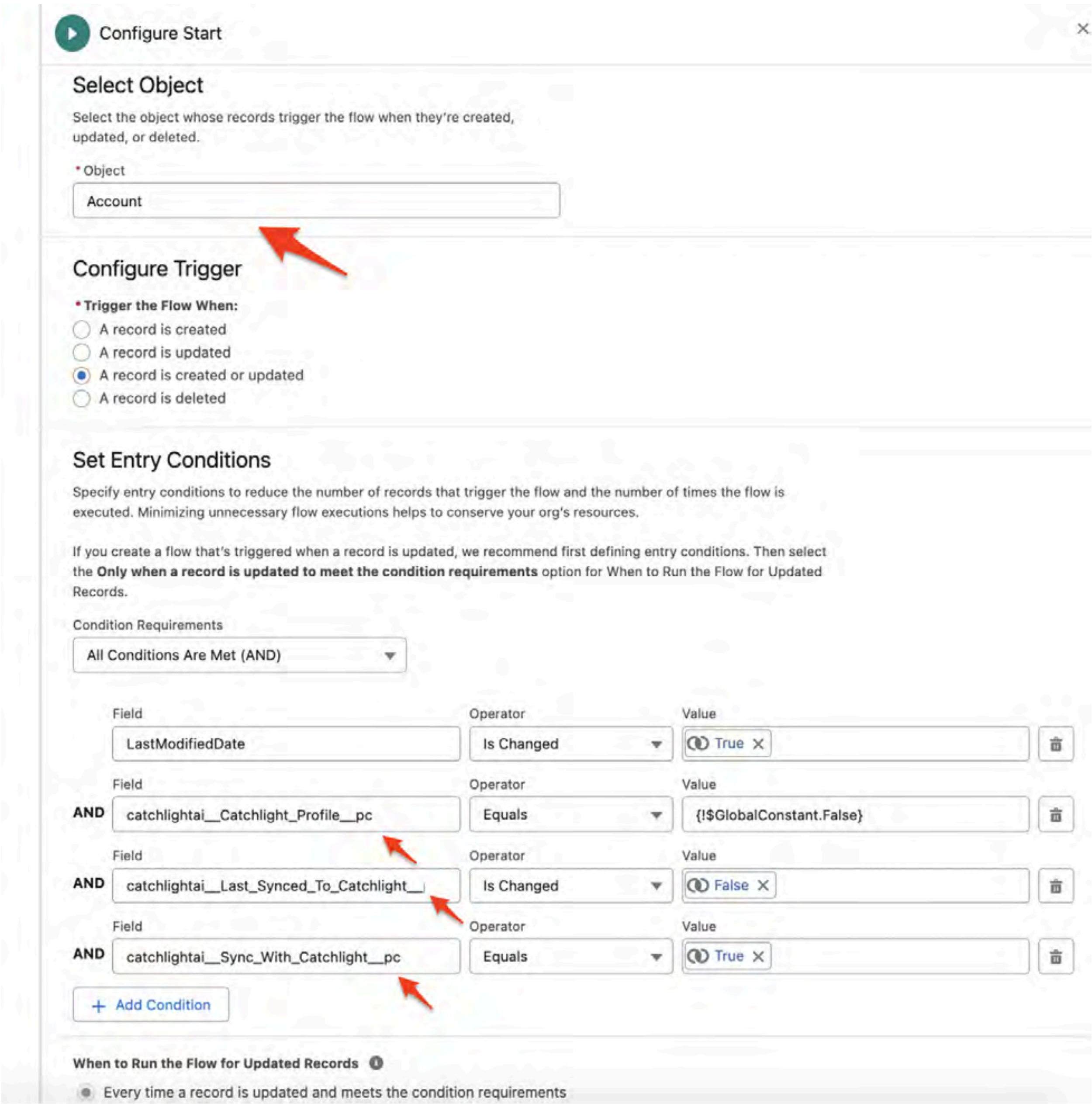


- This is the **Sync Person Account to Catchlight** Flow, which is cloned and edited from the previous Flow



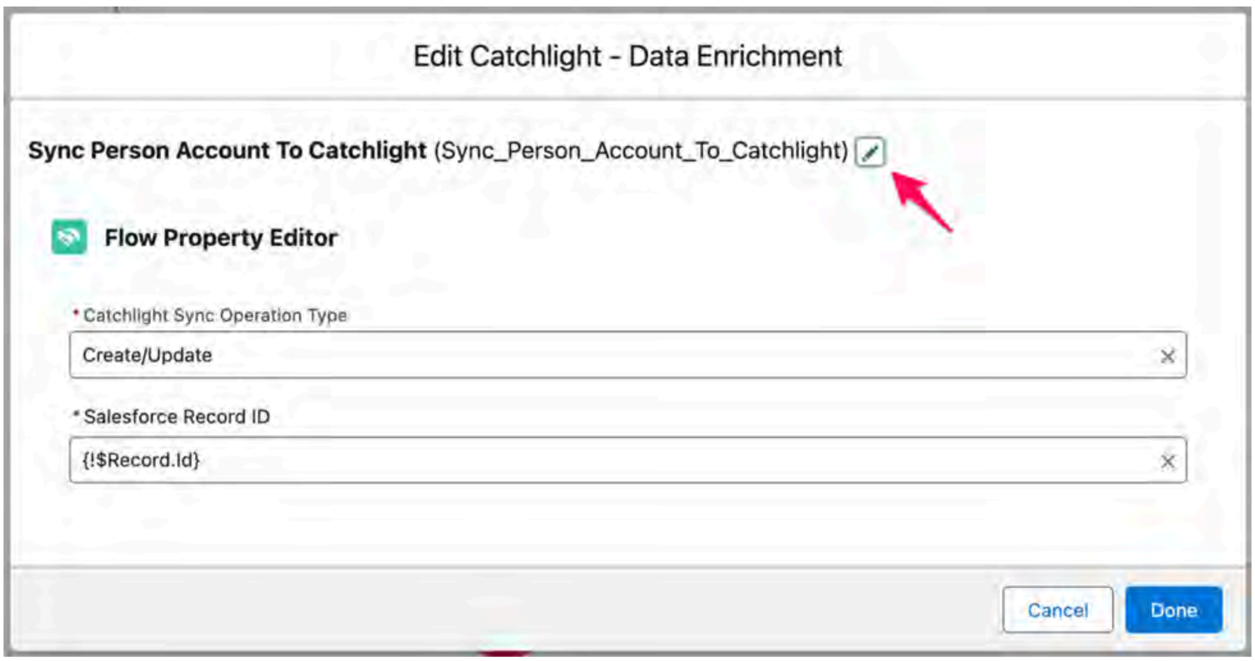
In the flow template, we will be modifying these two nodes. We will start with the Start node.

Start



- In the Object field select **Account** instead of Contact
- Modify the 2nd Condition Requirement Field to **catchlightai__Catchlight_Profile__pc**
- Modify the 3rd Condition Requirement Field to **catchlightai__Last_Synced_To_Catchlight__pc**
- Modify the 4th Condition Requirement Field to **catchlightai__Sync_With_Catchlight__pc**

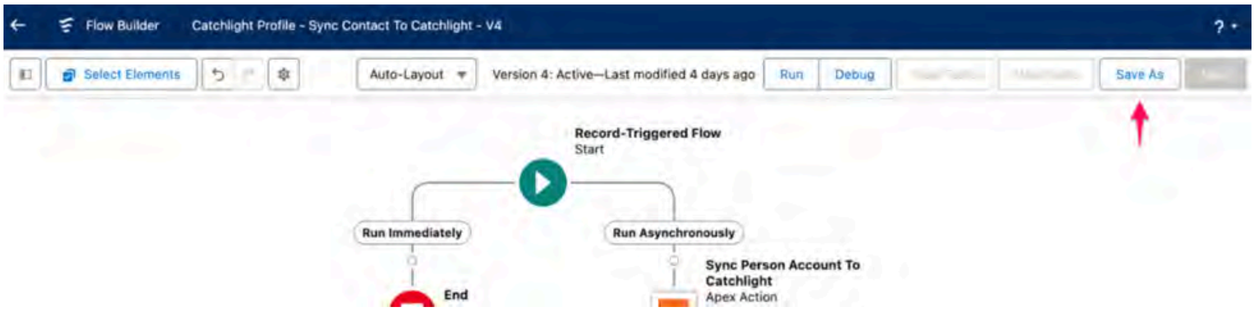
Sync Person Account to Catchlight



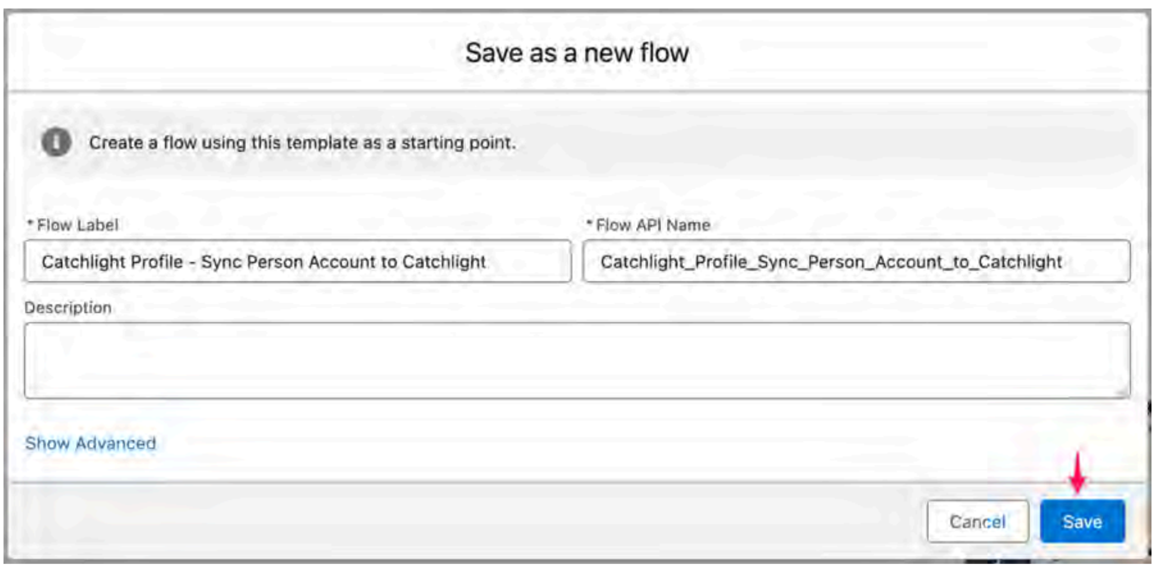
- Rename Sync Contact to Catchlight to **Sync Person Account to Catchlight**

To finish the process of saving and activating this new Sync Flow for Person Accounts,

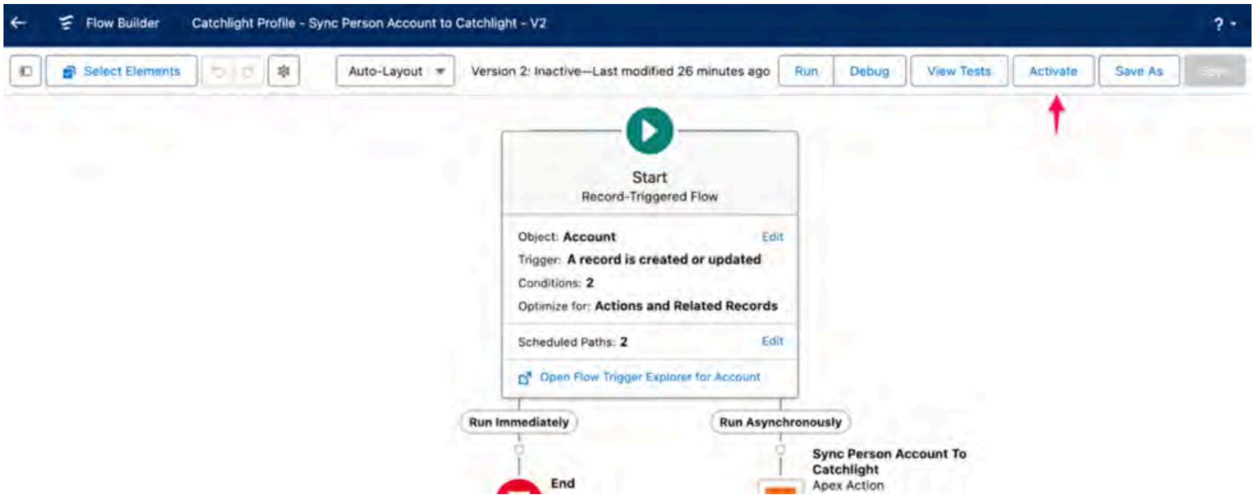
- Click **Save As**



- Enter Enter Flow Label
    - **Catchlight Profile - Sync Person Account to Catchlight**
- Click **Save**



- Click **Activate**



NOTE: The Account object must be mapped in the Data Mapper step. The "Person Account" Record Type has to be selected in the Salesforce Record Type field. In V2 of the app, the Person Account Data Mapping will automatically be created after installation is complete.

Added In V2 - Delete Sync Flows

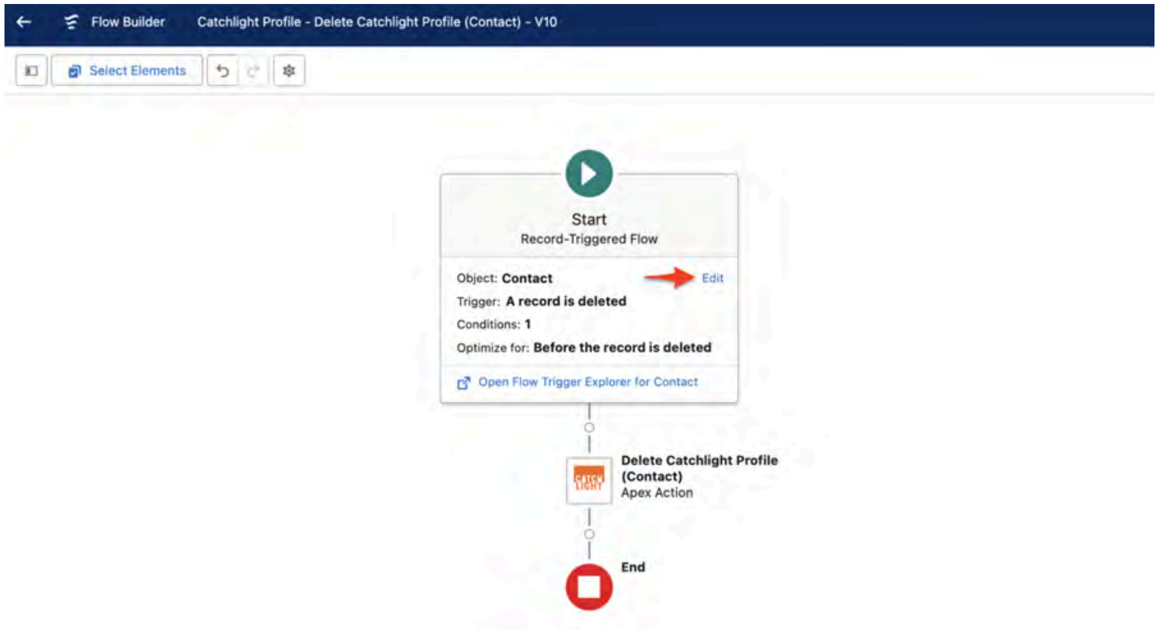
NOTE: We have removed deletion sync functionality from the schedulable Batch Job in order to prevent extra erroneous API calls to Catchlight. The deletion sync is now handled strictly from the Deletion Flows, and it is required that these Flows remain Active in order for any deletion sync to work.

Delete Catchlight Profile (Contact) Flow

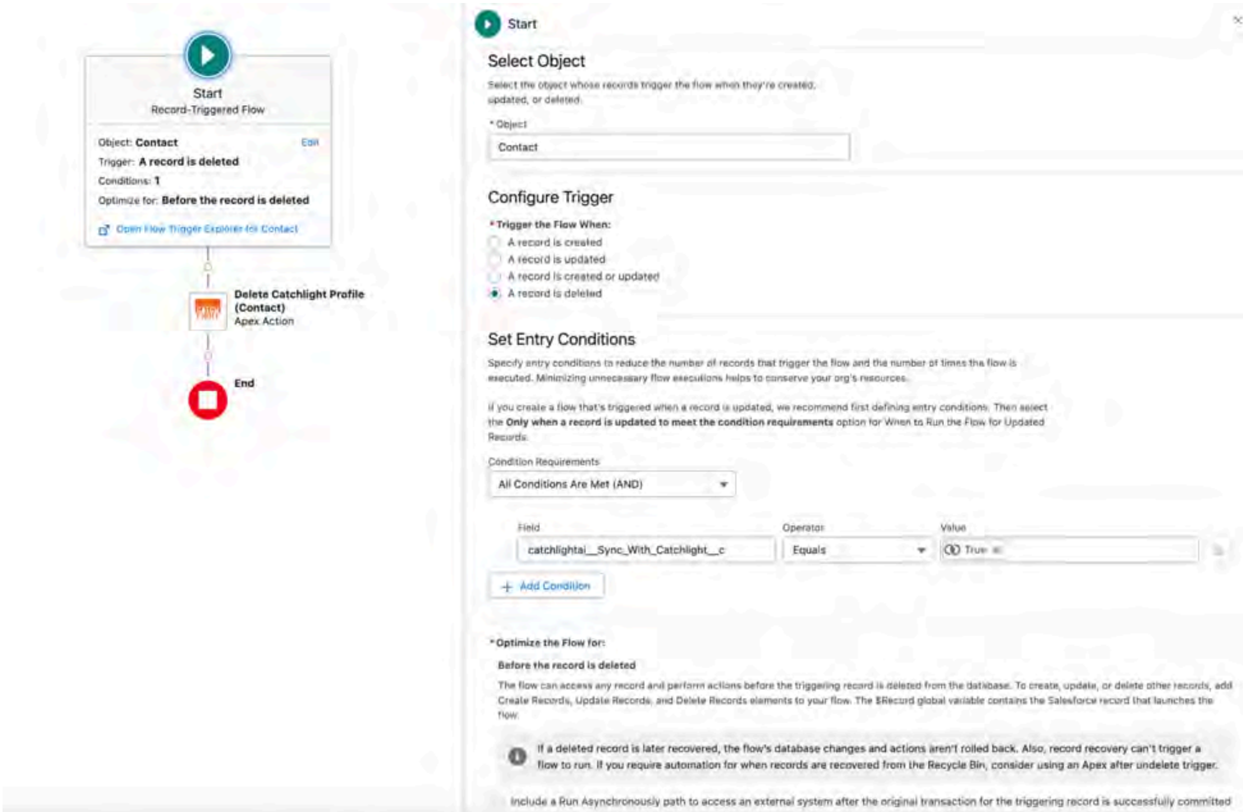
This Flow is triggered when a Contact is deleted, and the Sync with Catchlight checkbox is set to True. It utilizes the packaged Custom Property Editor to perform an Outbound delete sync.

Start Node

- Click **Edit** to view the details of the node

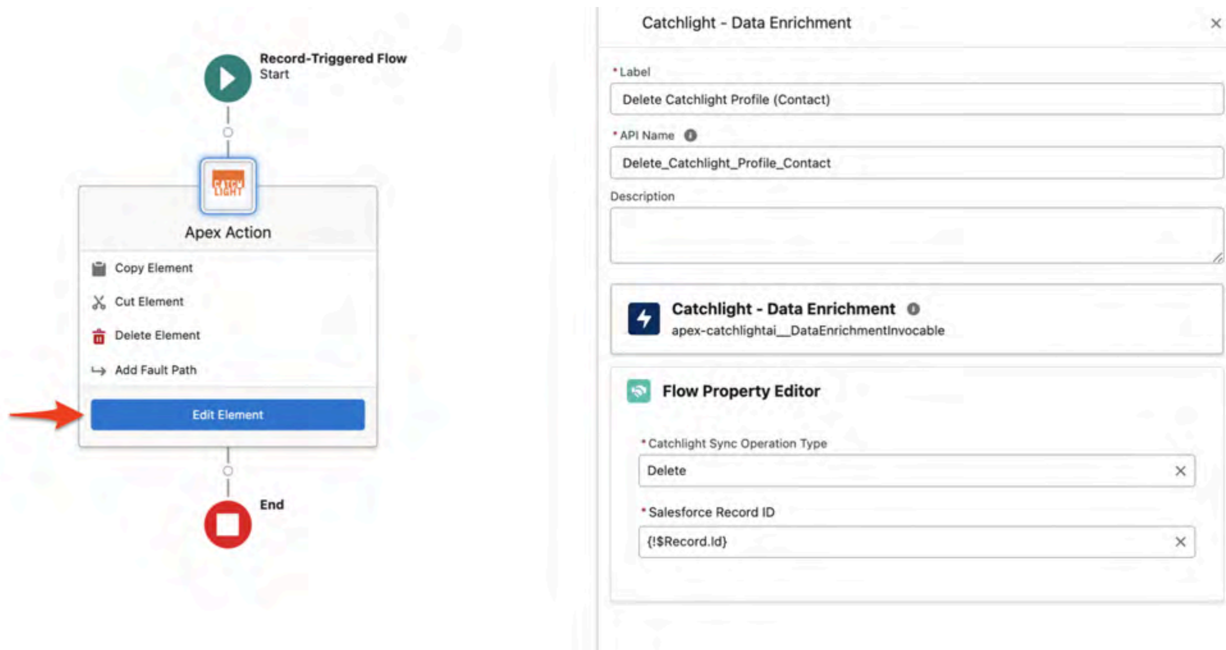


- The Flow is fired off the Contact object. It is triggered every time a record is deleted and Sync with Catchlight equals True.

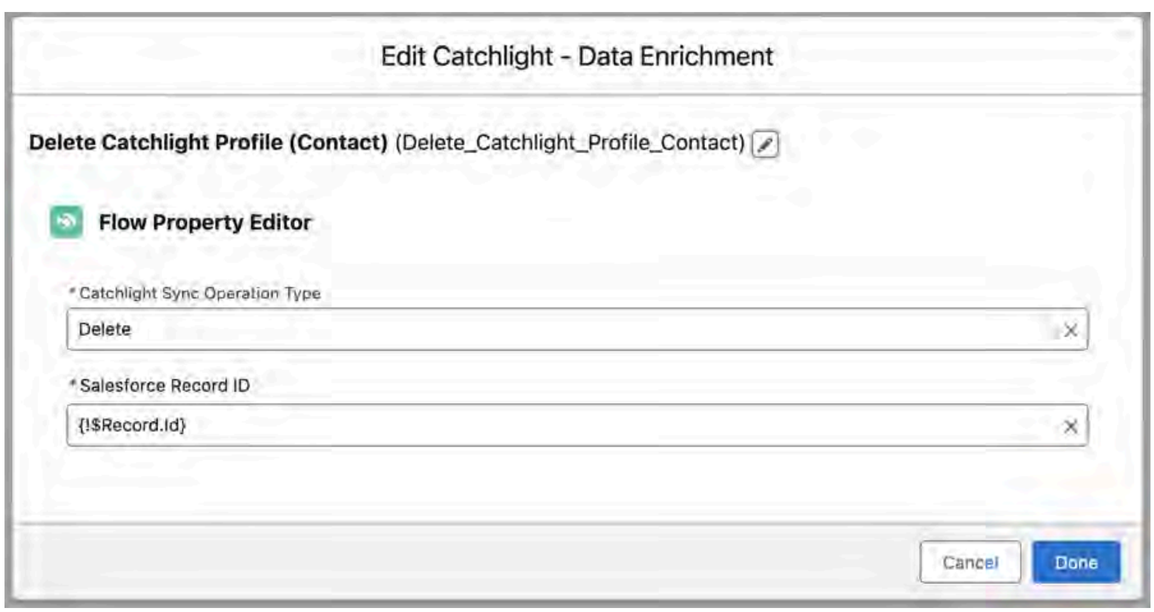


Delete Catchlight Profile (Contact) Node

- Click **Edit Element** to view the details of the node



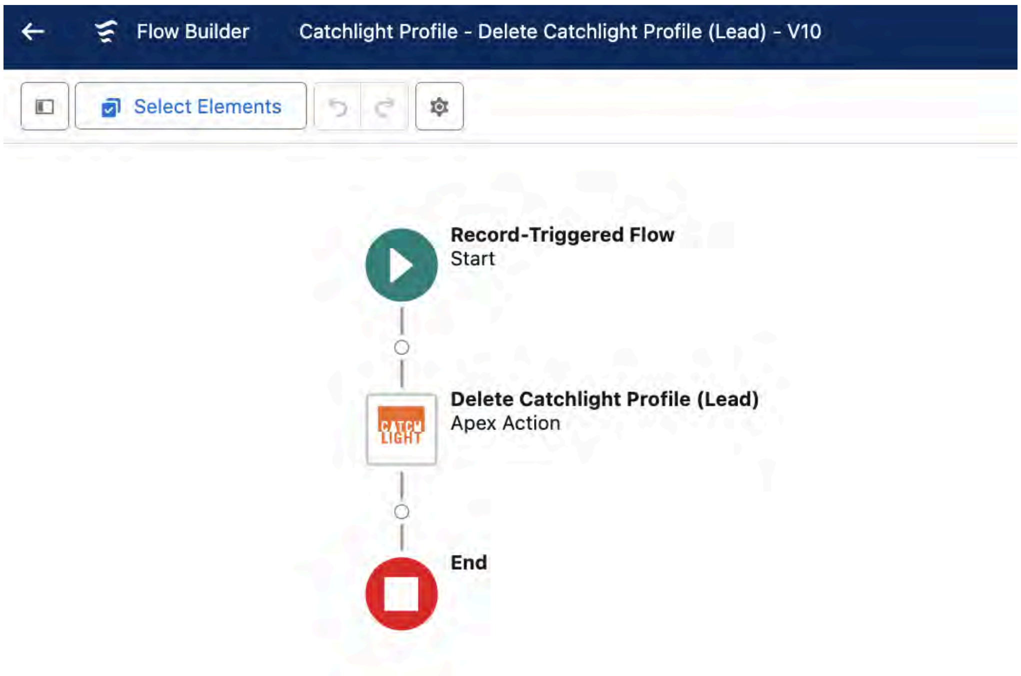
- Delete Catchlight Profile (Contact) is an **Apex Action** node with a **Custom Property Editor** that performs an Outbound Delete Sync to Catchlight



Delete Catchlight Profile (Lead) Flow

This Flow is triggered when a Lead is deleted, and the Sync with Catchlight checkbox is set to True. It utilizes the packaged Custom Property Editor to perform an Outbound sync.

The Flow shares the same structure as the Delete Catchlight Profile (Contact) Flow, with the trigger condition and sync adapted for the Lead Object.

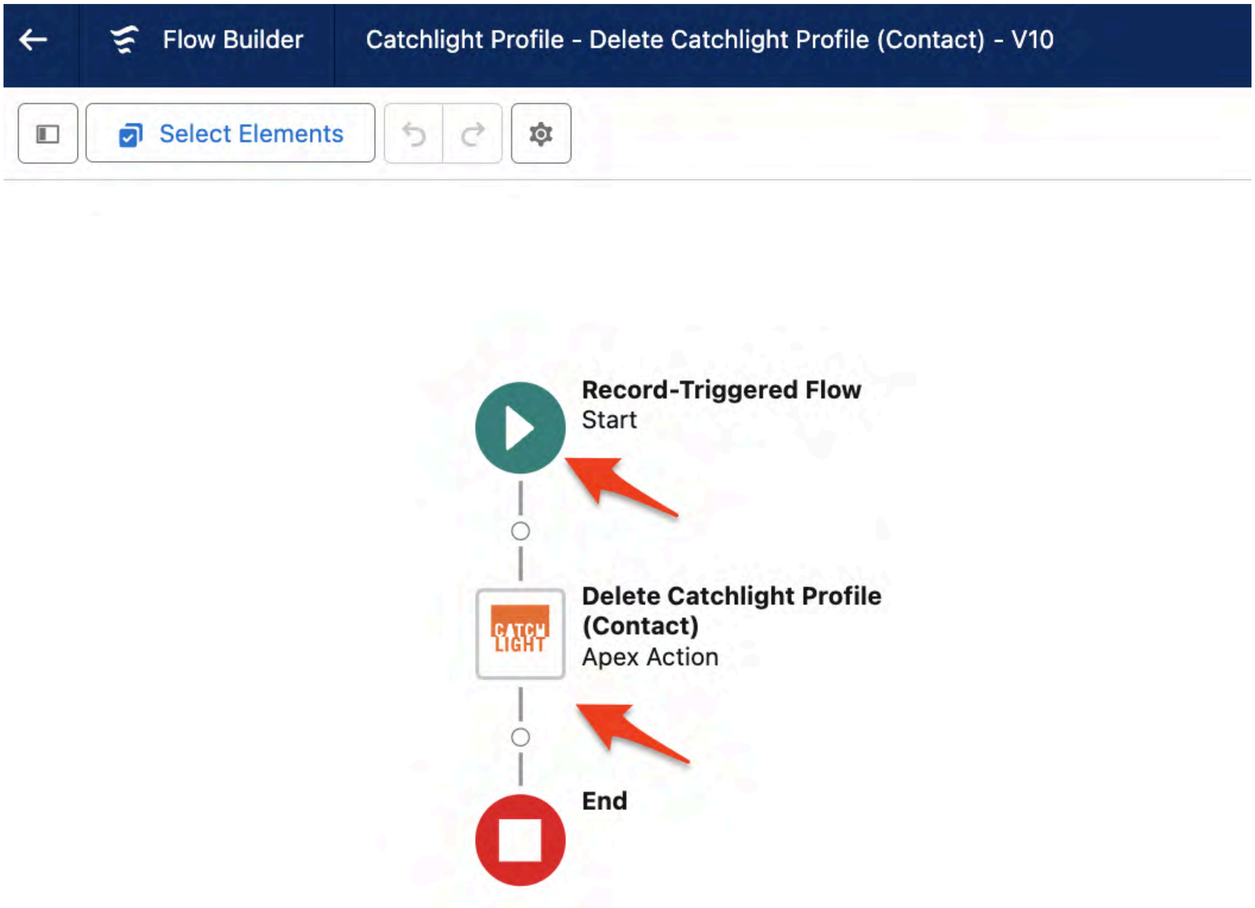


Configuring the packaged Delete Sync Flows for your FSC org with Person Accounts

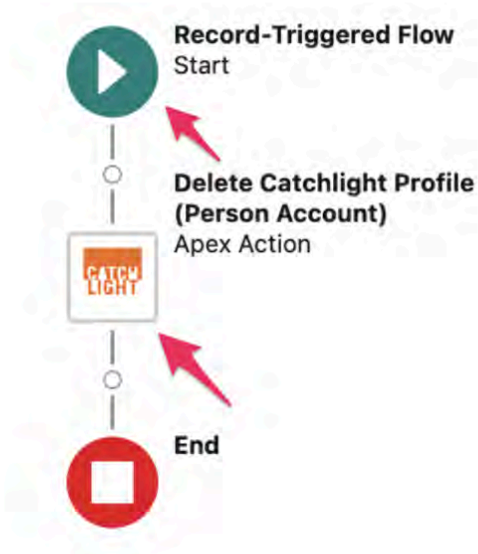
In order to successfully complete a delete sync with Person Accounts in a Financial Services Cloud org, either one of the **Delete Sync** Flows must be cloned and changed to reflect the use of Person Accounts.

- Refer to these helpful links for Flows in Salesforce
  - Salesforce Help: Flows and Processes
  - Trailhead: Build Flows with Flow Builder

- This is the **Delete Catchlight Profile (Contact)** Flow

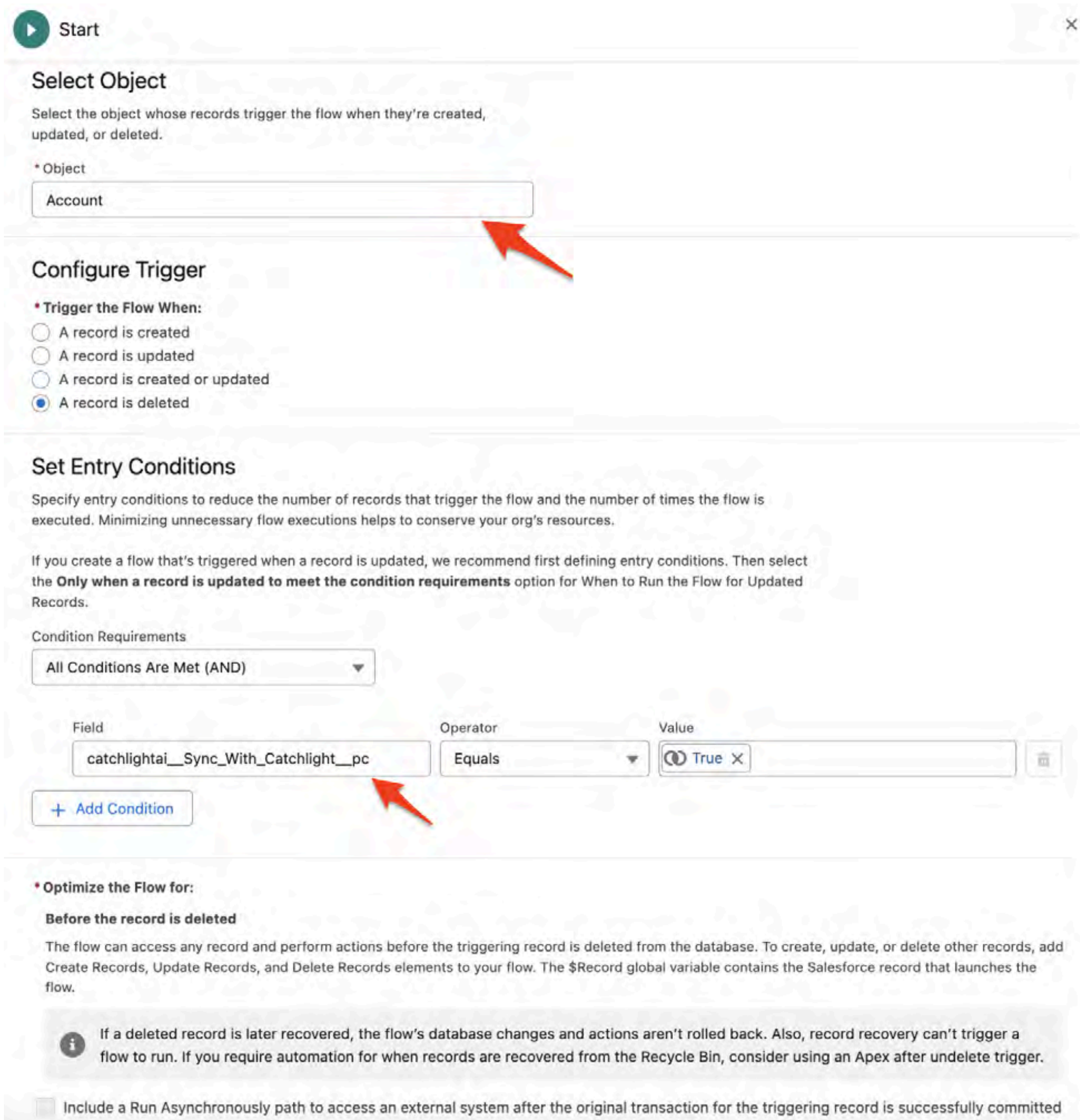


- This is the **Delete Catchlight Profile (Person Account)** Flow, which is cloned and edited from the previous Flow



In the flow template, we will be modifying these two nodes. We will start with the Start node.

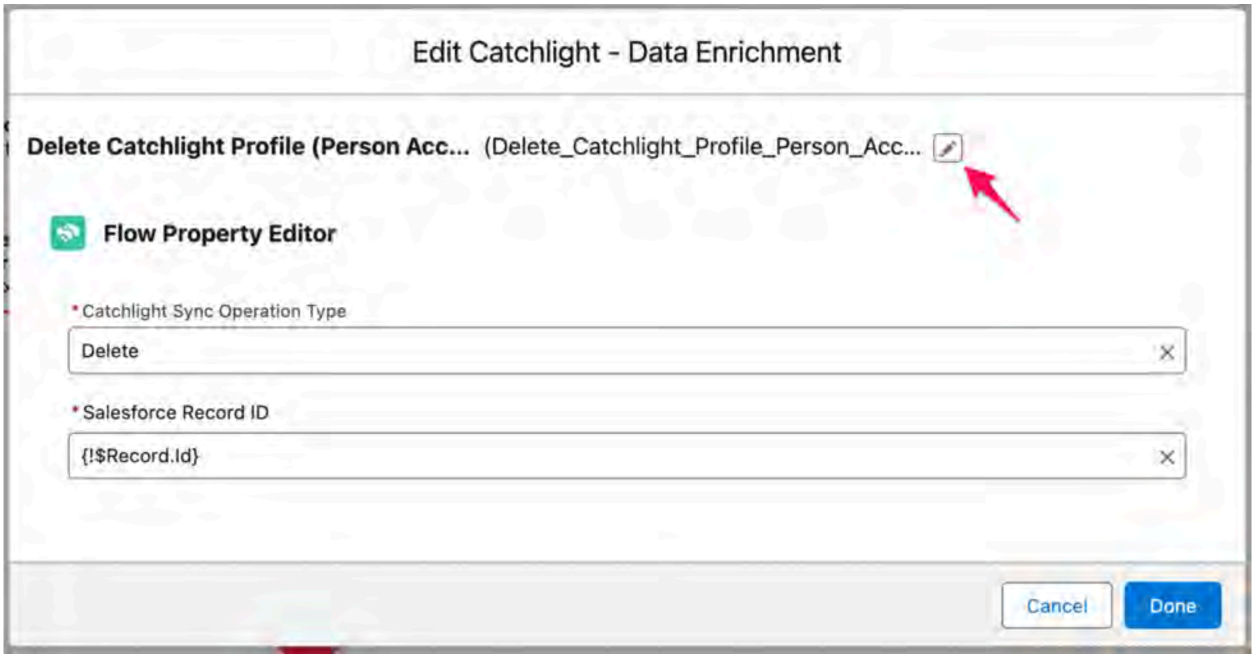
Start



- In the Object field select **Account** instead of Contact

- Modify the Condition Requirement Field to **catchlightai__Sync_With_Catchlight__pc**

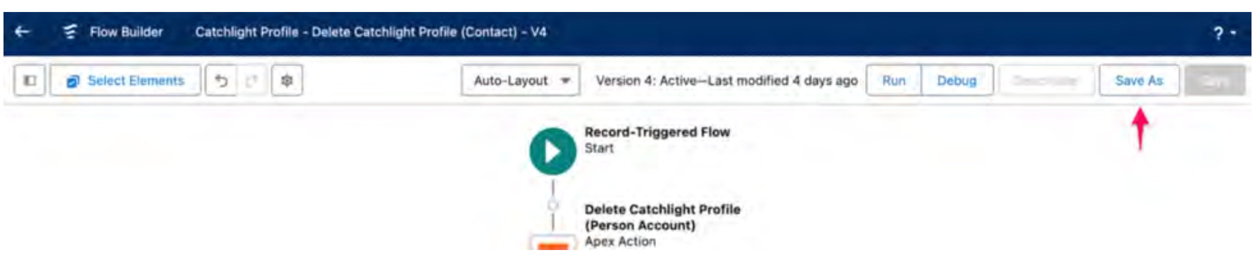
Sync Person Account to Catchlight



- Rename Delete Catchlight Profile (Contact) to **Delete Catchlight Profile (Person Account)**

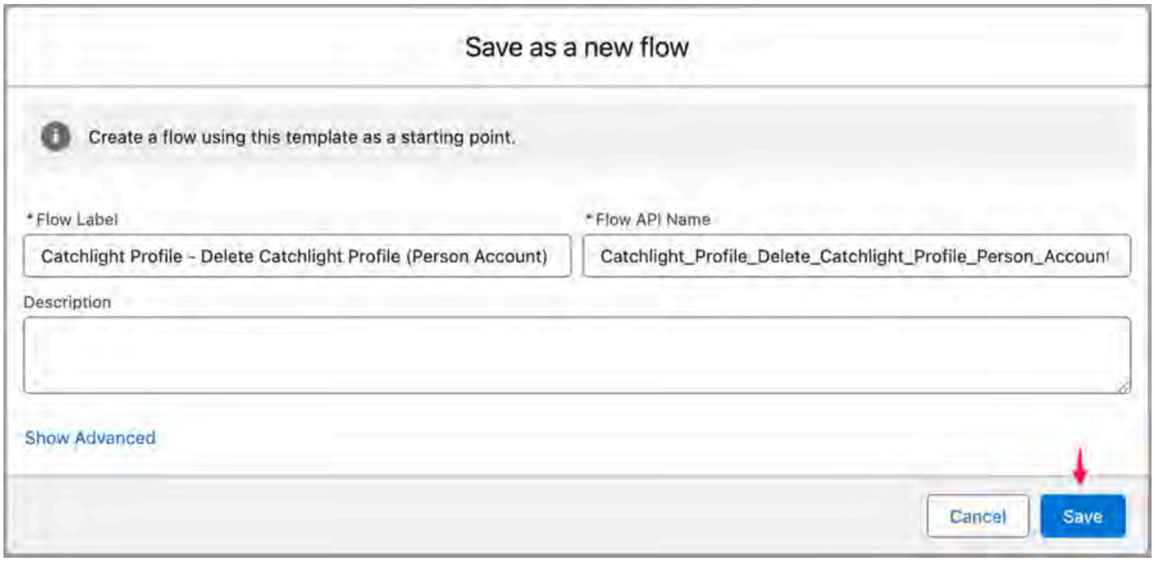
To finish the process of saving and activating this new Sync Flow for Person Accounts,

- Click **Save As**

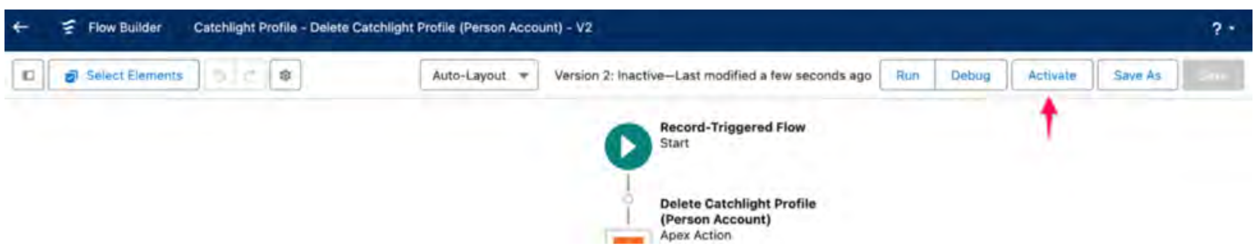


- Enter Enter Flow Label
  - **Catchlight Profile - Delete Catchlight Profile (Person Account)**

- Click **Save**



- Click **Activate**



NOTE: The Account object must be mapped in the Data Mapper step. The "Person Account" Record Type has to be selected in the Salesforce Record Type field. In V2 of the app, the Person Account Data Mapping will automatically be created after installation is complete.

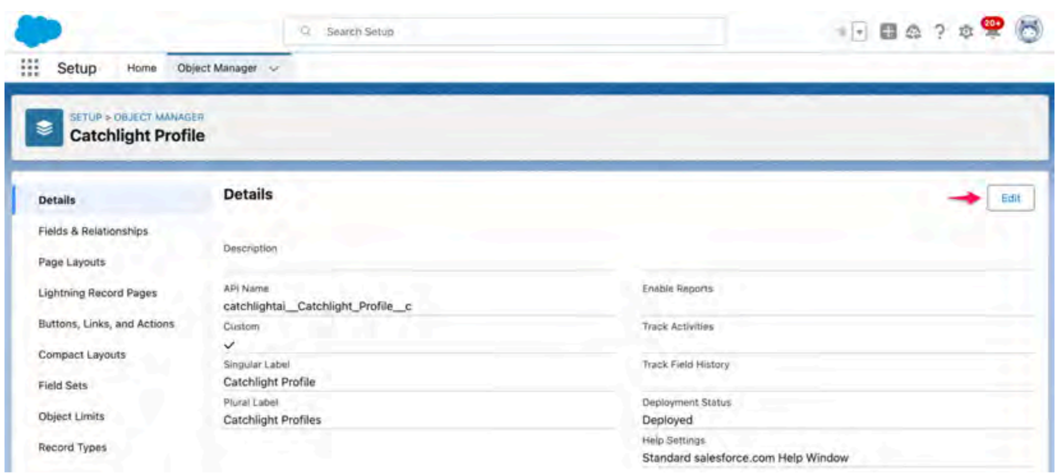
Additional Resources

Limitations and Gotchas

There are three gotchas that need to be mentioned for the Catchlight app:

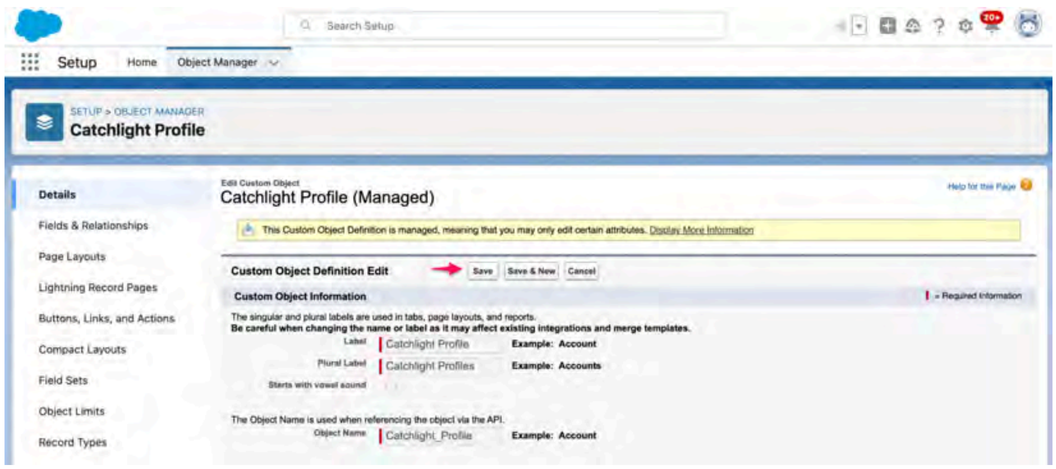
- Gotcha #1: In V2, the Catchlight Profile Object is set to Allow Reports on install. If you are upgrading from a V1 package, however, the Allow Reports flag will still be set to False after upgrade is complete. In order to set the Allow Report flag to True, follow these steps:
  - Navigate to **Setup > Object Manager** and click the **Catchlight Profile** object

  - Click **Edit**



- Scroll down and check the **Allow Reports** checkbox

- Scroll back up and click **Save**

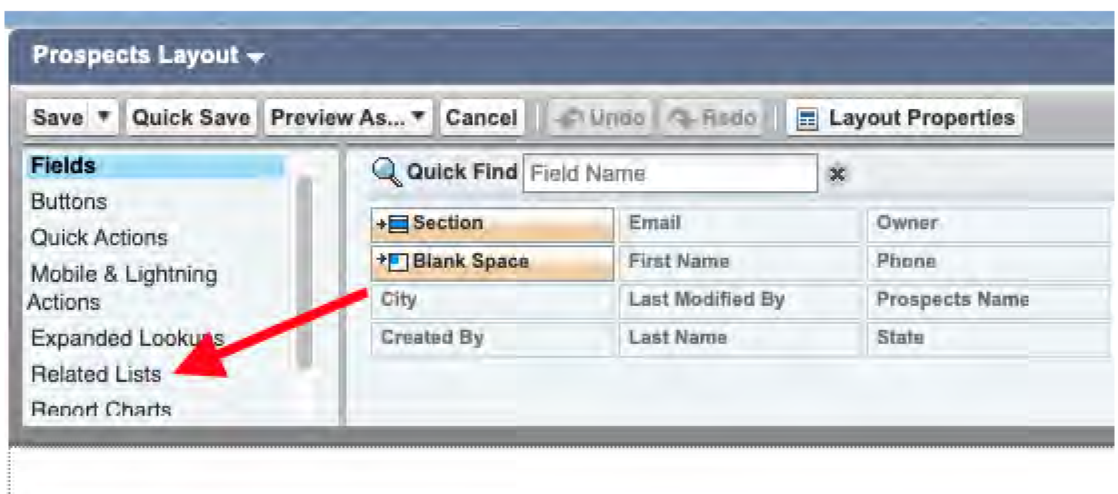


- Gotcha #2: There is a chance that the **Catchlight Profile Data Mapping** record can be deleted from the org. There is no way in the UI of the Catchlight app to re-create this record, but there is a workaround. If this ever occurs, an admin user can return to **System Connections** and reauthorize the **Outbound Connection** step. Upon completion of the step, the **Catchlight Profile Data Mapping** record will automatically be created
- Gotcha #3: We have removed deletion sync functionality from the schedulable **Batch Job** in order to prevent extra erroneous API calls to Catchlight. The deletion sync is now handled strictly from the **Deletion Flows**, and it is recommended that these Flows remain Active.

Adding a Related List to the Object record page

The Catchlight Profile Related List can be included in a Salesforce Object's record page layout. This will allow the user to view the object record's Catchlight Profile Record associated with the object record. To configure this, navigate to the gear icon of your org.

- Click Setup
- From Setup, open Object Manager
- Use Quick Find to select the object to change
- Click Page Layouts
- Select the page layout you want to add the related list to
- Select Related Lists from the navigation of the page layout

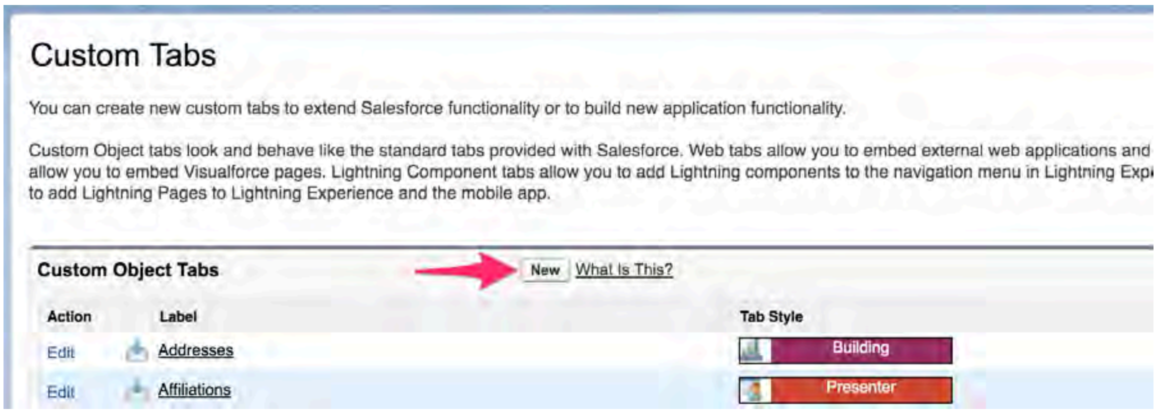


- Drag and drop the Catchlight Profile related list to your page layout
- Click Save

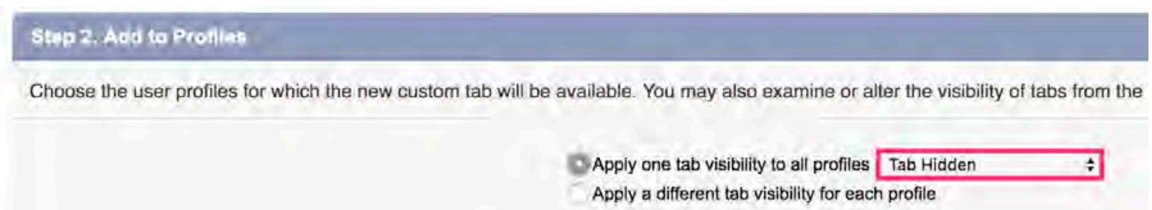
Creating a Custom Tab

Catchlight admins have the option to create a Custom tab to display a custom object they have created. In order to add the tab, navigate to **Setup > User Interface > Tabs**

- From Custom Tabs, select **New**

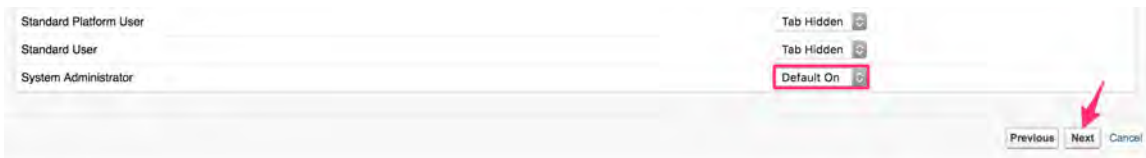


- For "Step 1. Enter the Details", select the custom object you have created to display in the custom tab
- Select the **Tab Style lookup icon** to display the Tab Style Selector and select the color scheme and icon for the custom tab
- Optionally choose a custom link and/or enter a description of the tab
- Click **Next**
- For "Step 2. Add to Profiles", select **Apply one tab visibility to all profiles**
- Click the drop-down picklist and select **Tab Hidden**



- Then select **Apply a different tab visibility for each profile**

- Scroll to the System Administrator profile and click the drop-down picklist and select **Default On**
- Select **Next**



Note: Visibility should be granted to only those profiles which need access to manage/view logged errors. If another user profile needs access to this tab, you must update their tab visibility access settings.

- For "Step 3. Add to Custom Apps", select the Custom Apps for which the new custom object tab will be available
- Select **Save**

For more information, please refer to Salesforce documentation on Creating a Custom Object Tab.